

Final Evaluation of the Projects of the MCA-Morocco Compact – Lot 3 –Final Evaluation of the
“Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training (FLVT)”
Activity, Contract No. APP/2012/PP10/QCBS/ME-16-lot-3



Final Report
Final Version

Artisan and Fez Medina Project (AFM)

Artisan Activity

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Disclaimer

The evaluators are solely responsible for the content of this report, which can in no case be considered to reflect the opinion of *Agence du Partenariat pour le Progrès* (APP), the Millennium Challenge Corporation (MCC), TRANSTEC, or any other institution and/or individual mentioned in this report.

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Executive Summary

Methodological Approach

The evaluation of the **Handicrafts** activity assesses five lines of action, each addressing one or more of the six evaluation criteria stipulated by APP for this study.

The evaluation of the *Promotional Campaigns* subactivity focused on the ability of enterprises to meet the needs of the market and on the contribution of activities designed to sustainably increase the income of the beneficiary artisans (*effectiveness*).

For the *National Label* subactivity, which is still too recent to have had any impact on the beneficiaries, the evaluation focused on the strategy of differentiating Moroccan handicrafts with a national label and promoting use of the label (*relevance*), as well as the ability of Moroccan authorities to continue pursuing the activities carried out under the MCA framework (*sustainability*).

The evaluation of the *Tourism Circuits* subactivity centered on increases in income and profits from businesses linked with tourism (*effectiveness*), combined with the quality of the means resulting from the creation or revitalization of tourism circuits (*efficiency*).

The evaluation of the *Training of Potters* subactivity looked at direct effects (*effectiveness*) – especially potters’ adoption of the recommended practices for improving their performance and the quality of their wares.

Finally, the evaluation of the *Replacement of Traditional Kilns with Gas Kilns* subactivity paid particular attention to the strategy chosen (*relevance*) and the constraints encountered (*efficiency*), especially the indirect impact on the socioeconomic fabric and environment.

Given the diversity of the activities to be evaluated (five subactivities), the evaluation team concentrated on extensive direct participation by the beneficiaries through focus groups and semi structured interviews, coupled with a sample survey of 170 beneficiary artisans (70 from Production Support and 100 from Promotion Support).

The focus groups consisted of individuals who had purchased a gas kiln in Fez and a selection of potters in Fez and Marrakech, some who had received training and others who had applied for financing.

In the semi structured interviews, the heads of the PMUs (Project Management Units), as well as the staff of the consulting firms in charge of each of the subactivities, were interviewed. Finally, all types of beneficiaries were found through these interviews. The independent artisans, potters who had received training, and potters who had secured a financing agreement were broken down by sex, type of beneficiary (independent artisans and SMEs), and trade.

Main findings of the mission by evaluation criterion:

The issue of **time** played a major role in the main conclusions drawn from this evaluation, whether in the preparations necessary for artisans to understand their markets or the maturation of new practices such as labeling. The need for real inter-ministerial coordination policies in the fields of tourism, handicrafts, and cultural heritage was clear, as was the need to associate them with systematic publicity and promotional campaigns. As for the concept of specifically Moroccan trademarks, the need to tailor them to the leading modern markets

(buildings, decoration) was also apparent. This evaluation also revealed the need for genuine complementarity in order to maintain a coherent framework for the activities of the AFM project, including the guidelines that emerged to support handicrafts and preserve the uniqueness of the Fez medina. The training activities appear to have yielded tangible results; however, some beneficiaries regretted not having been sufficiently consulted about their needs. Finally, the experience with the gas kilns, which was limited but full of lessons learned, was an eye-opener for the artisans and sparked a great deal of interest in technical development.

Concerning the **Handicrafts activity as a whole**, it goes without saying that the delays in the preparatory phase reduced the time devoted to implementing the activities. Moreover, given the project’s objectives, too little consideration appears to have been given to internal demand in implementing the project in view of the opportunities it offered for businesses. It likewise appears that red tape in some areas reduced the cost-effectiveness of the activity. Finally, it was found that the project’s methods were a real apprenticeship in effectiveness for the PMU teams and had a significant impact on relations between government and women in the handicrafts sector.

For the **Promotion Support** activity:

- Good overall relevance
- Variable coherence
- Rather low effectiveness levels
- Variable efficiency
- Promising impacts

For the **Production Support** activity:

- Good overall relevance
- Rather poor coherence
- Very low effectiveness to date
- Rather mixed efficiency
- Rather mixed impacts as well

These findings yielded 17 recommendations.

Main conclusions and recommendations:

- For *Promotional Campaigns*: get artisans financially involved and coordinate skill-building and promotional activities
- For the *National Label*: give priority to auditing the 300 units already certified as “collective brands,” steer these “collective brands” toward growth markets and postpone the post-project promotional campaign that was scheduled
- For the *Tourism Circuits*: ensure the cooperation of all competent authorities in sector entities, conduct regular information and promotional campaigns, seek consensus among the signatories to “tourism circuit” agreements, and preserve the uniqueness of the Fez medina, which is a city of artisans and not a *souk*.

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- For *Training of Potters*: help potters embrace and apply the practices taught; set aside a significant portion of the budget for individual training; get local actors involved in the design of the project; favor groups devoted to educating the public; ensure that the material taught keeps theory to a minimum and automatically translates it to practice; and finally, consider the potters’ periods of low activity
- For *Replacement of Traditional Kilns with Gas Kilns*: provide support for organizing the sector, design and implement a structured HQSE approach, gradually integrate technical advances, and guarantee the sustainability of the project

Sustainability of activities:

Subactivity	Sustainability	Recommendations/ Mitigation
Training of Potters	Poor	Continue to pursue activities to help potters adopt and apply the know-how imparted
Replacement of Traditional Kilns with Gas Kilns	Rather mixed: Good for production with high value added; poor for other types	Creation of entities for sharing equipment (collective kilns)
Promotional Campaigns	Good	Keep <i>Maison de l’Artisan</i> involved
National Label	Good	Audit the 300 units already certified as “collective brands”
Tourism Circuits	Not guaranteed	Create dedicated budgets

Acronyms

ADER	Agence de Développement et de Réhabilitation de la Medina de Fès
AFM	Artisanat et Fès Médina
AMU	Activity Management Unit
APP	Agence du Partenariat pour le Progrès
CA	Chambre de l’Artisanat
CFA	Centre de Formation par Apprentissage
COL	Comité d’Octroi de Label
COS	Conseil d’Orientation Stratégique
CQPAT	Centre de qualification professionnelle des arts traditionnels
CRRL	Comité de Rédaction du Référentiel de Labellisation
CRT	Comité Régional du Tourisme
DQRD	Direction Qualité, Recherche, et Développement
DRA	Direction Régionale de l’Artisanat
EE&S	Environment, Health, and Safety
EGL	Entité de Gestion du Label
EL	Evaluation line
EQ	Evaluation Question
FEA	Fédération des Entreprises d’Artisanat
FG	Focus Group
FNE	Fonds National de l’Environnement
GIE	Groupement d’intérêt économique
HQSE	Health, Quality, Safety, and Environment
IAT	Institut des Arts Traditionnels
MA	Ministry of Handicrafts
MCA	Millennium Challenge Account
MCC	Millennium Challenge Corporation
MDA	Maison de l’Artisan
ME	Microentreprise
MEP	Monitoring and Evaluation Plan
NGO	Nongovernmental Organization
OFPPT	Office de la Formation Professionnelle et de la Promotion du Travail
OMNT	National Office of the Ministry of Tourism
OMPIC	Office Marocain de la propriété Industrielle et commerciale
PMU	Program Management Unit
RFP	Request for Proposal
SMEs	Small and Medium-sized Enterprises
SMIs	Small and Medium-sized Industries
SMIT	Société Marocaine d’Ingénierie Touristique
SSE	Health, Safety, and Environment
VAT	Value Added Tax
VT	Vocational Training
TOR	Terms of Reference

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Chapter 1: Preamble

1.1 Mission objectives

Pursuant to the TOR for evaluating the Artisan and Fez Médina project, which were borne in mind by the project team from the outset, the evaluation of this subactivity (as well as that of the functional literacy subactivity¹ conducted in tandem) in follow-up to the 2011 mid-term evaluation “must assess the performance of this project and activity in terms of the criteria of relevance, effectiveness, efficiency, and sustainability, as well as impact, while taking gender into account. It must draw lessons from the institutional partners involved and formulate useful recommendations, on the one hand, to guarantee the sustainability of the outcomes obtained [...] and on the other, to improve the design and implementation of similar projects relevant to the handicrafts sector and the restoration of historical sites.” It should be underscored that the analytical approach of the project evaluation team in the field was participatory, not only because the opinions of the beneficiaries and implementers are essential for assessing performance in terms of the aforementioned criteria and because the project team verified on several occasions that this approach was shared by the APP Monitoring and Evaluation Office as well as stakeholders of the MCC, but also because the beneficiaries’ and implementers’ participation provided a realistic look and guarantee of the “prospects for obtaining future outcomes from the AFM project,” as sought in the TOR.

Following the instructions in the TOR directly, the Consortium adopted an evaluation methodology that considered the potential sources of problems and/or obstacles to the performance outlined in the initial identification and formulation of the project. The evaluation team applied these principles and operationalized them by defining the evaluation parameters as precisely as possible,² detailing project objectives in a conceptual and logical framework and in tools for coherent data collection in the field, and ensuring coherence internally and with the TOR’s objectives.

1.2 The Consultant and project implementation

1.2.1 The Transtec - Attitudes Conseil Consortium

In deploying its team in the field, the Consortium took great pains to select one that combined international expertise in countries economically, socially, and culturally similar to Morocco with an insider’s knowledge of the fields of activity and institutional scenarios covered by Lot 3.

Each team member contributed particular expertise to the project, as follows:

¹ According to the TOR, this final evaluation report for the AFM project differs from that of the FLVT activity, which is the subject of its own final report. However, the project team employed a “systematic” methodological approach that examined AFM and FLVT results in terms of a framework of specific outcomes that were part of a general framework (see AFM and FLVT Methodology Notes) – especially, as most of the beneficiaries were artisans (virtually all of them in the AFM project and 45% of them in the FLVT subactivity).

² To do so, the experts sought more frequent contact with the institutional and operational partners. This was not always easy because of the latter’s limited availability, especially given their mandates vis-à-vis the MCA.

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- Architect **Bouchra Alaoui**, specializing in the restoration of cultural heritage, with extensive knowledge of the specific heritage of Fez and its medina
- Handicrafts and design specialist **Jean-François Astoury**, with a long career in evaluation and providing training for this type of beneficiary
- Statistician Aomar Ibourk, university professor and researcher in this field, who from the outset monitored the design, development, and administration of the sample survey tools to the 770 people surveyed
- Environmental expert Mohammed Yousfi, who, though joining the team in the operational phase, capitalized on the other experts’ preliminary results on risk and environmental protection measures in the AFM project

1.2.2 Implementation and organization of the work^{3,4}

As the project moved forward, the Consortium strove to put together a first-rate evaluation team made up of experts with different professional and cultural backgrounds (a strategy that undoubtedly enriched the process but at the same time heightened the risk of disagreements and misunderstandings) to take the greatest possible advantage of the synergy among them. From the outset, the team’s cultural mix (4 Moroccans and 4 non-Moroccans) was an asset for developing its project’s methodological approaches – especially for tackling the qualitative and cultural dimensions of the evaluation (not to mention analyzing and interpreting the quantitative data gathered in the Phase 2 fieldwork).

Regarding relations between the team of experts and APP, the client, the Consortium would like to express its appreciation to the officials of the PMU Monitoring and Evaluation office for making themselves available and closely monitoring the progress of the work and the content and form of the resulting deliverables. The Team Leader and each expert constantly benefited from that availability to hold the desired working meetings, which were marked by lengthy debates with a wealth of content that yielded tangible results, for which we thank them here.

1.3 Status of the Artisan Activity as of Juin 2013

1.3.1 Budgetary aspects

The project had a budget differential of negative US\$261,534 for the Production Support subactivity and negative US\$1,242,968 for the Promotion Support subactivity.⁵

³ See Annex 1: List of people spoken to

⁴ See Annex 2: List of documents consulted

⁵ See Annex 8: Budget of the subactivities “Promotion Support” and “Production Support”

1.3.2 Project status at the time of the evaluation

- Promotional campaigns: 100% of activities completed
- National Label: introduction of the National Label is in the pilot phase; informational campaigns targeting the media and general public are in the approval stage and/or are already under way; a communication/promotion plan is in the approval stage
- Tourism circuits: all activities completed
- Training of potters: all activities completed in June 2011
- Replacement of traditional kilns: environmental and social impact study approved; 5 gas stoves purchased for demonstration purposes and delivered in June 2011; project implementation is being finalized.

1.4 Project timetable⁶

⁶ See Annex 3: Project Timetable

Chapter 2: Mission Deployment

2.1 Challenges implementing the operational framework

Among the various scenarios for usefully describing the work accomplished – that is, implementation of the operational framework proposed by the Consortium for evaluating Lot 3 – the evaluation team chose that of recounting the evaluators’ experience going back and forth over all the results of the AFM project over a five-month period. It is important first to point out the start-up problems, which were due primarily to the need to reach agreement on the methodology with APP⁷; this led to delays in the finalization and approval of the Methodology Notes. Notwithstanding, these delays did not have an adverse impact, as they led (especially after the Team Leader joined the other experts) to beneficial meetings and methodological discussions among the evaluators, the Team Leader, and APP’s Monitoring and Evaluation Coordinator.

These discussions enabled the APP and the evaluation team to advance their critical thinking to simultaneously:

- Better understand the real issues in this evaluation
- Ensure the resulting clarity of the methodological concepts to be implemented prior to the launch of the evaluation mission.

Here, the evaluation team would like to point out the benefits accruing from the excessively long methodology phase (Phase 1):

- On the one hand, the effort to simplify concepts (and their semantic consequences, which it was important to clarify) with respect to the relationship between the means employed in this project, its two activities and their subactivities, and the short-term and expected medium- and long-term outcomes. Reflected in the Methodology Note and, hence, the evaluators’ work, this simplification yielded both a new descriptive framework containing all the components developed by the Compact for the AFM project (thus rewriting the history of this project during its three years of existence) and a new logical framework that respected the project evaluation criteria in the Terms of Reference⁸, while focusing the evaluation on the evidence of the project’s impact and specific outcomes.⁹ This, of course, strongly influenced the choice of data collection tools, especially those for the field survey of beneficiaries;
- On the other hand, the conceptual framework’s inclusion of the observation of beneficiaries’ opinions about AFM project outputs and impact and the assessment of their satisfaction with the immediate outcomes in terms of their current and future expectations. Although it should be no substitute for measurement, this dimension – the analysis of satisfaction in terms of expectations – is very important in an evaluation of this type. Moreover, while fully in line with the participatory approach chosen by the team, it was actually conducted to ascertain the beneficiaries’

⁷ The absence of a Team Leader for the first seven weeks of the evaluation work no doubt significantly contributed to these problems.

⁸ Relevance, coherence, efficiency, effectiveness, sustainability, and impacts.

⁹ The activity in support of the handicrafts sector (production and promotion) and the activity for restoring the Fez medina had their own particular characteristics, which the evaluation team gave priority to analyzing from the start of the mission by means of visits and interviews; the result was an evaluation process that was socially and culturally appropriate to the domains involved.

motivation and interest to ensure the sustainability of AFM project activities. This analysis of unquantifiable aspects (the meeting of expectations) is an integral part of the evaluation and is reflected in the matrices/logical frameworks in the Methodology Note and the questionnaires’ inclusion of a series of more personalized questions that were previously lacking.

The field survey played a major role in the methodology that the evaluation team adopted after consulting with APP. However, as in any work of this nature, the choice of interviewers and their supervisors is extremely important and affects the quality of the work. It is widely known that all institutions, domestic or international, encounter the same problems in this type of exercise. From the outset, efforts were made to forge a team of interviewers and supervisors acceptable to APP; however, due in part to the delay in the finalization and approval of the Methodology Note, the need to produce the successive field reports obliged the team to keep a minimum cadre of interviewers and supervisors available – and thereby ensure contractual logistics by engaging, with the assent of APP, a specialized consulting firm that had a very good reputation with the Ministry of Handicrafts and APP: *Data Ingénierie* (DI). DI was tasked by the Consortium with recruiting the interviewers and supervisors, providing them with the necessary transportation, collecting and reviewing the questionnaires once they had been completed,¹⁰ and entering the data into the matrix created by the statistician.

Close collaboration between the evaluation team and DI enabled the team to train the interviewers and supervisors (which APP verified) and finish the interview and data entry work with the aforementioned delays, while adhering to the established quality criteria. The respective deliverables (Phase 2) were submitted to APP on 16 August.¹¹

Furthermore, the agency created by the Government of Morocco and MCC to attend to the needs of the MCA, *Agence du Partenariat et du Progrès* (APP), took time to find its place in the institutional structure of the sectors covered by its project — a structure consisting of half a dozen ministries and several agencies or bureaus.¹² Each PMU had to muster its full arsenal of personal and institutional relations to advance its respective project, and the Monitoring and Evaluation Office had to contend with the customary institutional obstacles to “cross-cutting” operations in order to follow the evaluation guidelines established by MCC, the donor. The Moroccan authorities will undoubtedly draw lessons from this situation and its consequences and remove these obstacles if a second Compact is launched in 2015. Nonetheless, these problems did not have any visible effect on the work of the expert evaluators in this exercise, since our main intermediary was the Monitoring and Evaluation Office, which was always available to coordinate the meetings that the experts requested with their sectoral PMUs and the institutions involved.

¹⁰ This monitoring, done on a random basis, was conducted by the logistics expert and expert evaluators, as well as the APP Monitoring and Evaluation Coordinator.

¹¹ A total of 770 paper questionnaires completed and verified. Their data was saved on CD-ROM, accompanied by the metadata files required by the MCC

¹² Ministries of Tourism, Handicrafts, Education, Agriculture, Fisheries, Labor, OFPPT, DLCA (which is in the process of becoming an autonomous agency), etc.

2.2 Evaluation approach

2.2.1 Qualitative approach – Handicrafts

Given the time constraints, the Consultant first conducted the semistructured interviews, which continued throughout mission. The contact information for the most relevant individuals was gradually obtained during the course of the interviews and often depended on the good will of the interviewees. The contact information for the beneficiaries and partners was obtained from the project managers. It should be noted that some actors who did not have the consent of their superiors could not furnish the project documents.

Pertinent notes from these interviews have been included directly in the body of this report. This phase was conducted over the course of the mission while work on the different versions of the methodology report was under way. Then, in its final week in the field, the team received a letter of introduction from APP, enabling the evaluators to be formally introduced to the partners and actors who had yet to be found and interviewed. After collaborating in the training of the moderators and interviewers, the expert evaluator monitored the interviews while organizing and following the monitors’ conduct of the focus groups in Fez and Marrakech.

2.2.2 Cross-cutting quantitative approach

Sampling method: For the AFM and FLVT evaluations as a whole, the size of the original sample of 1297 individuals stipulated in the TOR was cut to 770 following the APP’s decision, communicated on 4 July 2013, to eliminate the Vocational Training and PEAQC activities from the Transtec-AC evaluation. The size of the sample for the evaluation of just the AFM and Handicrafts and Fez Medina activities was 270 individuals.

The reasons behind this choice were budgetary and quality concerns. First, the size of the sample was determined by the budgetary credits allocated to the evaluation after taking the cost of collecting data from the statistical units into account. Second, 770 individuals were selected because of the need to obtain significant results for the main variables; this affected the integration of the beneficiaries (strata constructed), given the difficulty locating the statistical units and the problem of nonresponse, which is, *de facto*, relatively high for this type of survey. The table below presents the distribution of the sample:

Activity and Subactivity	Number of strata	Number of beneficiaries	Sample size
AFM – Fez medina	6	1000	100
AFM/Artisans – Production support	18	2332	70
AFM/Artisans – Promotional support	36		100
Total	424		270

Table 1: Sample distribution

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In order to meet the objectives and guarantee the quality of the survey results, the Consultant opted for a **stratification of the target populations** to form homogeneous groups by variable, correlated with the variables of interest.

Effective stratification not only yields better representativeness of the population as a whole but increases the accuracy of the results for homogeneous groups. This method, however, will not consist of a uniform comparison of the stratification variables, but instead, vary by level, due to the small size of the sample surveyed. The aforementioned Methodology Note submitted at the conclusion of Phase 1 contains the **definition of the sampling criteria (stratifications)**, which respect the locales indicated in the TOR for the AFM interventions. These criteria include a specification over and above the one in the initial proposal to better meet the evaluation objectives, adapt to the concentration of beneficiaries in the selected regions, and guarantee the total number of interviews to conduct pursuant to the TOR, while respecting the need to include the gender dimension in the evaluation.

Development of the survey design respected contractual obligations and the survey constraints, notably the available means and delays that had occurred. The choice of sampling technique, therefore, had to minimize both bias and variance. Given the rich survey base (exhaustiveness and reliability) and evaluation context available, the Consultant opted for a **systematic survey with equal probability within the strata constructed**. This type of survey is very common, as it offers better-quality results and requires no adjustment. However, with this type of survey, the sample is widely dispersed geographically, which had direct implications for the cost of data collection in the field. The beneficiaries will therefore be classified in a very specific order (according to the different types of stratification variables), and the sample will be drawn systematically with a probability ranging from “equal” to “irregular.”

The starting unit is drawn through simple random selection among the numbers from 1 to “not drawn.” The units to survey are then drawn automatically using appropriate software.

Chapter 3: Evaluation Methodology¹³

3.1 Evaluation parameters

This chapter describes the evaluation parameters chosen by the evaluator in terms of target population for each subactivity.

Production Support subactivity:

- Potter training and gas kilns: The beneficiaries are the 2332 potters of Fez and Marrakech identified by the project (independent artisan-owners, salaried master artisans, artisan assistants). They included potters who had taken the five training modules, potters who had tried to purchase a kiln, and those who had purchased a kiln.
- 70 of them were interviewed as part of the survey, as stipulated in the TOR.

Promotion support subactivity:

- Promotional Campaigns: The beneficiaries are the 430 participants from the promotional campaigns in Fez and Marrakech: national fairs, international trade fairs, marketing missions, buyers’ visits, press trips
- National Label: The beneficiaries in Fez and Marrakech are the 345 participants in the various training and information activities and the 30 businesses audited in the label pilot phase
- Tourism Circuits: The beneficiaries are the 2163 and 4440 points of sale for artisans’ goods and services located along the tourism circuits of Fez and Marrakech
- 100 of them were interviewed as part of the survey, pursuant to the TOR

3.2 Evaluation criteria

The evaluation was based on the criteria defined in the Methodological Note, whose main characteristics are reviewed below:

- Relevance:
This criterion evaluates the aptness of this activity to the beneficiaries’ needs, considering the social, economic, and cultural characteristics of Moroccan society.
- Coherence:
This criterion reflects the degree and manner in which this subactivity is complemented with the interventions of other institutional and noninstitutional stakeholders, both public and private, donors, etc. It analyzes the coherence between the project design and the specific objectives, as well as aptness of the means employed to the objectives and delays.
- Efficiency:

¹³ See Annex 4: Descriptive Framework of the Components

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This criterion analyzes resource mobilization in terms of time and cost and outcomes in terms of budgets mobilized. It explains any cost overruns and delays observed. Finally, it analyzes beneficiary involvement.

- Effectiveness:

This criterion shows the outcomes of the action taken following implementation of the activities. It gauges the degree to which outcomes were obtained, without confining itself to the indicators in the project’s Monitoring and Evaluation Plan. It analyzes the rate at which the practices recommended during the project were adopted and their impact on quality, price, and income.

- Sustainability:

This criterion estimates the relevance and probability of maintaining the benefits provided to the beneficiaries beyond the life of the Compact.

3.3 Evaluation tools^{14,15}

For the semistructured interviews, the choice of whom to interview was dictated by the type of project actor. All heads of the PMUs (project managers in Fez and Marrakech) were interviewed, as was the responsible staff from the consulting firms in charge of each of the five activities. The partners were selected prior to or after contributing to the project, based on their relevance to the project. The choice of direct or indirect beneficiaries and their representatives was based on the contact information received from APP or gleaned from each encounter. However, most types of beneficiaries were found.

For independent artisans, potters who had participated in the training, and those who had obtained financing through domestic or international campaigns, good male/female distribution was promoted, bearing in mind the different types of beneficiaries (independent artisans and SMEs) and trades.

For the focus groups on production, it was decided to concentrate the purchasers of gas kilns from Fez in a single group. For Fez and Marrakech, it was decided to combine a sample of potters who had participated in the training with potters who had applied for funding.

¹⁴ See Annex 6: Survey of Artisan Beneficiaries

¹⁵ See Annex 7: Artisan Activity “Focus Group” Reports

Chapter 4: Evaluation findings and conclusions

4.1 Aspects common to the two activities

4.1.1 Relevance (aspects common to the two activities)

Conclusion: Although the privileged position of tourism should not be called into question, tourism demand poses the risk of undermining the quality of handicrafts, while the domestic market has hardly been taken into account, even though it is one of the principal business opportunities for the enterprises.

The Moroccan government has created a series of sectoral economic growth programs, notably the National Initiative for Human Development (INDH), the Emergence Plan, and Vision 2015 for the handicrafts sector, which were launched between 2005 and 2006. With this foundation, an interministerial committee, in consultation with the various national and local stakeholders, set the priorities and submitted an application to MCC. At MCC’s request, a consultation was held to define the objectives and intervention logic. Implementing the Program involved in-depth exchanges and negotiations between MCC and the Ministry of Handicrafts that resulted in the drafting of the Compact and its official launch in 2007. Thus, the latter became part of the strategy initiated by the Moroccan authorities and is fully relevant.

Part of the AFM project (which also included the “Functional Literacy and Vocational Training” and “Fez Medina” activities), the handicrafts production and artisan promotion activities are coherent with the expectations of the various stakeholders, such as *Fédération des Entreprises de l’Artisanat* (FEA) and the Chambers of Handicrafts. “The Artisan program involves activities vital for the handicrafts sector.” However, while the export aspect has been embraced by all, certain stakeholders have noted that the domestic market is hardly taken into account, even though it is one of the principal opportunities for the enterprises. Moreover, while tourism should not be ignored, many representatives of the handicrafts sector pointed out the risk that has been observed in other countries – that is, that “quality in the handicrafts sector will be undermined by the demands of tourism.” At the same time, they contend that Moroccan know-how and Morocco’s natural resources would be better exploited by the luxury sector, it being understood that the implementation modalities would have to be determined to prevent fragmentation of the sector.

4.1.2 Efficiency (aspects common to the two activities)

Conclusion: The time it takes government agencies to give authorization is considered too long and incompatible with a project management model based on precise objectives and activities. Furthermore, stakeholders felt that their role had been minimal.

Resource mobilization:

From the standpoint of the project managers: be it the approval of the TOR, the studies, the action to take, the preparation of the files for the RFP responses, validation of the market by APP, or the interviews with managers, most of the project managers interviewed mentioned

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the very long and deleterious delays. While the PMUs are relatively independent, they must nevertheless secure Ministry of Handicraft authorization for certain phases. PMU officials considered these authorization periods too long; this is an example of the obstacles posed by red tape for a project management approach based on precise objectives and activities.

From the standpoint of the consulting firms: different interpretations of the TOR and expected results led to very long internal approval processes that substantially delayed the execution of the project. In fact, this type of lump-sum contract led to interpretations of the nature of the activities to carry out.

The table below shows the dates and duration of the main activities.

	Response to RFPs	Signing of contracts	Launch of activity	End of activity	Duration of activity
Training of potters	Data unavailable	March 2010	May 2010	February 2011	13 months
Replacement of kilns	Data unavailable	April 2010	September 2011 ¹⁶	September 2013	24 months
Tourism circuits	November 2011	May 2012 ¹⁷	May 2012	June 2013	12 months
Label	November 2011	May 2012 ¹⁸	May 2012	September 2013	13 months
Campaigns	November 2011	June 2012 Negotiations of March/July 2012 ¹⁹	June 2012	August 2013	13 months

Table 2: Dates and duration of main activities

Partners’ desire for greater involvement

The interviews show that for all program subactivities, the role of stakeholders such as the Chambers of Handicrafts or *Fédération des Entreprises d’Artisanat* was minimized and that what was established was what could only be called “weak partnerships.”

Beyond simple invitations to the meetings, the other sectoral actors, such as the Offices of the Ministry of Handicrafts, would have liked to have been involved in the design and implementation of the project. Thus, adding a member from these agencies to the management teams would have fostered the building of bridges.

¹⁶ Source: Activity Report

¹⁷ Source: Performance Report 2013

¹⁸ Source: Performance Report 2013

¹⁹ Source: Performance Report 2013

4.1.3 Impacts (aspects common to the two activities)

Conclusion: Some of the methods employed by the project were a real apprenticeship in effectiveness for the PMU teams and had a significant impact on relations between government and women in the handicrafts sector.

An apprenticeship in effectiveness for the PMU teams:

Certain managers stated that the methods employed by the project made a tremendous contribution to their professionalization and that of their team. The delays imposed gave the teams involved the opportunity to become more effective. Also important was the transfer of competencies through collaboration between the consulting firms and the various national entities.

Gender approach:

The head of the PMU in Marrakech noted that women are less hesitant to go to the Handicrafts Office to inquire about possible aid: “the project has begun to break down the wall between the beneficiaries and the government.”

4.2 Support for Promotion

4.2.1 Design

Conclusion: The cumulative delays in the phase preparatory to the activities reduced the time devoted to implementing them. These delays were due largely to the drafting of TOR that were considered noncompliant or to delays in the approval of the “Study on Promotion Needs.”

Preparations for the activities: the first draft of the TOR for the activities covered in this evaluation was very detailed and deemed too restrictive by MCA. A second, more general and open version that met the needs on a lump-sum basis was therefore drafted to keep from limiting the number of responses to the RFP. Furthermore, two (out of a total of three) RFPs issued for the preparation of the TOR were canceled because the work submitted by the consultant was unsuitable²⁰.

At the start of certain activities, primarily those related to “Promotion Support,” the lump-sum basis resulted in varied interpretations of the TOR, which led to significant delays in the implementation of the activities.

The delays occasioned by the time it took to finalize the “Study on Promotion Needs” and finalize the study, whose purpose was to define and guide execution of the “Promotion Support” subactivities, affected the implementation schedule for those activities. Moreover, despite the significant survey work, certain PMU officials felt that the promotion plan proposed a panoply of tools that were too generic and not tailored enough to the Moroccan context.

Finally, the cumulative delays in the activities’ preparatory phase reduced the time devoted to implementing them. The remarks of one PMU official are representative of the consensus in the interviews: “A lot of time devoted to studies and too little to implementation.”

²⁰ Source: Interview with APP

4.2.2 Relevance

4.2.2.1 Promotional Campaigns

Conclusion: The relevance of this subactivity is good because it corresponds to two main expectations expressed by the beneficiaries: access to new markets in the local plan and the development of exports.

The table below presents the principal expectations of the handicrafts artisans and SMEs in terms of their participation in promotional campaigns.

Expectations of Artisans and SMEs	Percentage
Increase income	88.1
Access new international markets	69.0
Access new local markets & clients	76.2
Identify regular orders	61.9
Acquire new skills to promote their products	50.0

Table 3: Expectations of Promotional Campaigns

According to the study, the beneficiaries gave the following reasons for their participation in the promotional campaigns, in order of importance: increase incomes, access new local and then international markets, and identify regular orders. Even though acquiring new skills was one of the project’s expected results, it was the least important of the reasons for participating given by the artisans.

4.2.2.2 National Label

Conclusion: The interviews made it clear that implementation of the national label is relevant to the expectations of the sector and the needs of the beneficiaries. In fact, implementation will help to guarantee that “made in Morocco” affirms the distinctive Moroccan approach, and will address the difficulties faced by handicrafts enterprises in trying to individually put in place tools to protect intellectual property.

Covering the collective brands, the label prompts the same interest among the beneficiaries as does the implementation of the collective brands – that is, to address the difficulty for the artisans to put in place individual brands, implementation and management of which is not envisioned. However, interviews with the independent artisans showed that there is possible resistance at the commercial level from retailers. In fact, most artisans make a large part of their earnings through retailers. For obvious business reasons, the retailers do not want something that identifies the name of a product’s manufacturer. In the view of the consultant, this resistance will not be encountered with the label.

Whether in Fès or Marrakesh, the focus groups showed that artisans and SMEs have a strong interest in the label and in the principle of labeling.

In Fès, there are two concepts. On the one hand, fostering the development of new products, creativity, and the strengthening of quality; on the other hand, distinguishing themselves from competing products and protecting the rights of Moroccan handicrafts from foreign artisans and from counterfeiting in order to “close the path for intruders nonprofessionals, and annuitants.”

In Marrakesh, there are also two concepts. On the one hand, fostering creation to “introduce new lines, innovation, and creativity” that will engender beneficial competition between the artisans and the SMEs; on the other hand, the interest in determining the best producers “to organize and regulate the artisan sector/categorize and to filter the artisans and SMEs according to the seriousness and the quality of their products.”

In addition, the study showed that the participants in the training and awareness sessions believe that the label will be more profitable for the SMEs than for the independent artisans.

The study also shows²¹ that more than 70% of the SMEs and independent artisans surveyed believe that when the national label becomes operational, it will guarantee that the products have actually been made in Morocco and will enable labeled enterprises to increase their incomes.

4.2.2.3 Tourism Circuits

Conclusion: The creation and implementation of the tourism circuits in the medinas of Marrakesh and Fès are of average relevance. In facilitating contact between tourists and artisans at sales points, the circuits correspond to the expectations of different types of tourists and the needs of project beneficiaries. However, it is essential to take into account the agreements between the main bazaar operators and the tourist operators, which siphon off significant tourist flows and hinder direct contact by a major number of tourists with artisans.

Expectations of tourists regarding the handicrafts circuits:

According to artisans surveyed during the focus group, the tourism circuits actively contribute to the extension of networks and the promotion of trades that are in danger of extinction.

The semistructured interviews with tourism professionals showed the relevance of the tourism circuits with regard to the expectations of different types of tourists:

- “Cultural tourism:” These tourists generally go on the handicrafts circuit along with the historical circuit. On the handicrafts circuit, they particularly like the environment, the workshop, the “production” aspects, and above all the people-to-people contact. Thus the presence of a guide enables them to more easily establish that contact and is much appreciated. The product itself is just a pretext and is not the essential factor during their visits to the handicrafts circuits.²²

²¹ See Table 10 in the promotional campaigns report, Annex 6.

²² Source: Interviews with tourists on the Fès and Marrakech circuits.

- “Traditional tourism:” These tourists do not necessarily give priority to the circuits with a handicrafts theme. Their encounters with the artisans occur during the course of the visits to the medina. They do not have any expectations beyond finding lightweight products that will not surpass the weight limits of the airline companies.²³

In Fès and Marrakesh, the study found that 45% and 40% of beneficiaries, respectively, believe first and foremost that the new tourism circuits contribute to more visits from tourists, one of their principal expectations.

Resistance and possible constraining factors involving tourism actors

Of course, the guide companies resisted, seeing the project as taking away their clientele. In all tourism countries, it is well known that guides are often compensated by the merchants in exchange for bringing them to their stores. Although it is understood that the guides can earn commissions from the merchants – who are more inclined to give them something than are the artisans – this phenomenon is weak compared to the annual agreements negotiated each season between the bazaar operators and the tour operators. The latter siphon off a large number of visitors and receive significant payments from the major large bazaars of the two medinas. In return, the tour operators guarantee the large bazaars an annual number of visits from groups. The director of the Fès Regional Tourism Committee mentioned a newspaper article about the director of FRAM,²⁴ who spoke openly about the agreements with the bazaar operators: “That’s the right of passage that finances our brochures.”

With regard to the agreements between the tour operators and the bazaar operators, the representative of the city of Marrakesh noted that to the extent that the artisans are not organized within the fondouks, direct contact with tourists will be minimal. The artisans surveyed in the focus group were more positive and stated that “the circuits will fight against connivance and complicity, unfair competition, and the monopoly established over many years by certain large artisans.”

To address the agreements between the tour operators and the bazaar operators, it is necessary to undertake awareness activities about “responsible & sustainable tourism” with the tourism operators with a view toward participating in their offers and workshop visits, and in this way contributing to a better distribution of the benefits of tourism among the artisans.²⁵

Thus, the process of putting a majority of tourists in direct contact with the artisans is judged as weak. In fact, considering that 70% of tourists travel in groups run by tours operators,²⁶ and taking into account the agreements between the tour operators and the bazaar operators, most tourists are taken directly to the bazaars “without passing the artisan’s site.”

²³ Source: Interview with Saadia Bouziar, Chief of Facilities and Investments Services for the Ministry of Tourism.

²⁴ Principal tour operator in Morocco.

²⁵ Source: Interview with the representative of the Marrakech City Council

²⁶ Source: Interview with the president of the Fès Regional Tourism Committee.

4.2.3 Coherence

4.2.3.1 Promotional Campaigns

Conclusion: Coherence is weak due on the one hand to the limited timetables for implementation of the activities, and on the other to the dispersion of resources given the number of markets targeted and the small amount of resources directed toward preparing enterprises for their participation in the campaigns.

Coherence with national policies

The Maison de l’Artisan is the institutional mechanisms that aims to put at the disposal of professionals in the handicrafts sector all of the support and guidance necessary for marketing and promotion at the national and international levels.

It puts into practice the strategic orientations of Vision 2015 in terms of promotion: build an image of excellence for Moroccan handicrafts among targeted markets and introduce new handicrafts products into modern distribution networks.

Coherence between the conception of the project and the global and specific objectives

Objectives judged as improbable: With regard to planned activities, sustained improvement in incomes and increased exports of handicrafts products is not very likely. In fact, just initiating contacts with buyers – let alone in new markets – requires several years of promotional activities. This generally involves participating several times in the same trade fair prior to being able to expect to understand the new market and gain the confidence of the buyer. Therefore, the “one shot” participation such as that put forth by the project can only be considered as a “first step” toward a future business collaboration. It thus seems difficult for these activities to achieve significant results.

A lack of activities to prepare beneficiaries: the difficulty of accessing international markets is a recurrent problem for enterprises in the handicrafts sector. The experiences from these types of projects shows that bringing enterprises up to speed and carrying out promotional activities cannot be separated. The consultant responsible for providing support notes that in terms of international activity, Moroccan products correspond to the tastes and the price expectations of certain countries such as Russia, Brazil, and Japan, but do not naturally correspond (that is, without modification) to the expectations of certain other countries such as the United States. In order to address this gap, new products and pricing were suggested, but there was no time available to implement these suggestions.

At the same time, interviews with SMEs revealed that they would have liked to have received more consequential support prior to participating in the trade fairs. Therefore, to address the “lack of activities to prepare beneficiaries,” it will be desirable to not separate promotion activities and skill upgrading adapted to the capacity of the enterprises.

The focus group in Fès and Marrakesh on international campaigns also showed that the artisans and the SMEs would have liked more preparation as well as more follow-up. For example, the SMEs in Marrakesh discovered that accessing export markets requires partnerships with intermediaries, along with all that this implies in terms of examining trade margins, trade documents, and business strategies that are not adapted as needed. The SMEs in Fès invited to the Russian market determined that their access would be difficult because an

agreement was necessary for business activities, and there was an obligation as well to have a local partner.

Alignment between the resources available and the objectives and schedules:

All of the interviews with actors and beneficiaries, as well as the focus groups, confirmed that although the resources available were largely sufficient, the short implementation timetable significantly hindered implementation of the activities and had important repercussions on the expected results.

4.2.3.2 The National Label

Conclusion: The documentary analysis and the different interviews, particularly with the DQRD, were unambiguous in terms of the coherence of the national label with the strategy and the actions carried out by Morocco. In fact, its conception and implementation resulted in the national strategy described below. Covering all of the existing collective brands, the label includes three levels of adhesion with a direct link to the collective certification brands already in place for a dozen product groups. However, it will be appropriate to focus the labeling work on knowledge that has significant potential, particularly that in the construction sector which involves a strong Moroccan flavor.

Coherence with national policies and other donors

Implementing the labels is part of a strategy for Morocco entitled “Vision 2015.” It advocates promotion as one of the cross-cutting support measures to benefit the different actors in the sector. To carry this out, the creation of the national label was inscribed in “Vision 2015” in order to build the image of the Moroccan handicrafts brand and to inculcate it among final consumers in the targeted markets.

At the same time, the label is coherent with:

- The national labeling strategy in the handicrafts sectors
- The “Handicrafts in Morocco” label, the collective brands, and the five types of labels
- Actions to protect the environment
- The involvement of Morocco with donors in the labeling process.

Coherence between the conception of the project and global and specific objectives

The Project Management Unit responsible for this subactivity is based in the Maison de l’Artisan. In fact, this project has a strong “promotion” component, a subactivity for which the Maison de l’Artisan is responsible for the handicrafts sector. However, one could have imagined implementation of the label being conferred to the DGRD of the Ministry of Handicrafts, which implemented the collective brands and will naturally be in charge of management of the label when the project is finished.

4.2.3.3 Tourism Circuits

Conclusion: This subactivity is perfectly coherent with the sectorial strategies being carried out by Morocco. It contributes by its nature to increased synergy between handicrafts and tourism. There is also strong coherence with the Fès-Medina Project in that the rehabilitation of the fondouks in Fès will play an active role in consolidating sustainable support for the tourism circuits. However, it would be worthwhile to ensure that the allocation of that rehabilitation benefits real artisans, so that the locations contribute toward preserving what is distinctive about the Fès medina, a city of artisans.

Coherence with national policies and other donors

The MCC activity is part of the ongoing program for the rehabilitation of the Fès medina being carried out by the urban community of Fès implemented by the Agency for the Development and Rehabilitation of the Fès Medina since 2006. It is part of “Vision 2010,” integrating the promotion plan for tourism development in Fès.²⁷

In Marrakesh, the City Council already wanted tourism circuits to be created within the framework of its sustainable development projects (“Agenda 21”). In addition, the interview with the City Council found that interest was already expressed by residents during workshops on community development.

Coherence between the conception of the project and global and specific objectives

Focused on historical and handicrafts topics, the tourism circuits are a perfect illustration of the convergence between handicrafts/tourism/historical patrimony.

The study of promotion needs conducted in 2010 highlighted the lack of visibility and accessibility of independent artisans on the tourism circuits, thus reducing their opportunities for direct sales to tourists.²⁸

Coherence with the Fès Medina project:

Remarks during the focus group showed that the rehabilitation of the fondouks will actively contribute to the consolidation of the tourism circuits and the commercial and economic activities of tourism areas. This will allow for their structural development, thus contributing to better visibility of handicraft offerings, and ultimately will permit guides to offer trips organized around more effective tours. However, there was concern expressed by representatives of guides and fondouks (a feeling shared by the consultant on the basis of experience) about the allocation of the rehabilitated localities. Specifically, experience shows that in many countries, artisans from the start often find themselves pushed aside as a result of such relocations, as they are unable to meet the economic criteria set by the executing managers of these new locales. In addition, commercial pressures often result in the artisans who are selected wanting to go back to their previous business activity, which was more profitable.

²⁷ Source: Regional Tourism Development Program, Fès, 2010.

²⁸ Source: Idem, p. 3, « Global Planning for the Study of Promotional Needs.”

4.2.4 Effectiveness

4.2.4.1 Promotional Campaigns

Conclusion: The promotional campaigns have varied in their effectiveness, with an average increase in incomes of only 27%. However, the number of jobs created is satisfactory relative to the number of beneficiaries. There is little demand for price quotations and less for samples for the export market relative to the local market, where the strong potential warrants more attention and interest from sector support structures.

In terms of international activity, only 19% of beneficiaries received orders, although in the end there was a satisfactory increase in sales considering the short time period separating the evaluation from the activities carried out.

In terms of national activities, 64% of participants received orders, but the increase was not very satisfactory.

Review of objectives

This subactivity makes reference to two specific objectives that are presented in the logical framework in annex.

- A sustainable improvement in the incomes of individual artisans and SMEs linked to export and tourist markets
- An increase in the exportation of handicrafts products.

Increase in net annual average income (sales-costs) of micro businesses²⁹

The report showed a weak increase in the incomes of beneficiaries of promotional campaigns. Specifically, 7% of participants had no increase in sales; 54% increased sales by 10% or less; 29% increased sales by 15%-40%; and only 10% increased sales by more than 50%.³⁰

Finally, the report showed an average variation of 17.5% in the incomes of artisans who benefited from the promotional subactivity. In addition, taking into account the baseline³¹ indicates annual income of US\$29,137, with average annual income estimated at US\$34,236.

Number of jobs created by beneficiaries of the campaigns

The report found that 38% of the participants in the project did not create jobs, 31% created two jobs, and 12% created three or more jobs.

Taking into account the total number (net) of 430 beneficiaries and the data that resulted from the report, the number of jobs created by the beneficiaries of the promotional campaigns is estimated to be 533.³²

²⁹ Source: Monitoring Evaluation Plan (MEP), June 2012.

³⁰ See Table 24 in Annex 6 of the promotional campaigns report.

³¹ Source: MEP, June 2012.

³² See Table 16 of the promotional campaigns report, Annex 6.

Changes relative to wages and benefits of participants in the campaigns who received requests for price quotations

The report found that only 7% of participants in international trade fairs and marketing missions received requests for price quotations.³³ Only 5% of the participants in national trade fairs received requests for price quotations.³⁴

Percentage of participants in the campaigns who received requests for samples

The report showed that only 5% of the participants in international trade fairs and marketing missions received requests for samples.³⁵ In contrast, 17% of the participants in national trade fairs received requests for samples from merchants or exporters.³⁶ This result is one of the elements that show the strong potential of the local market, which merits more attention and interest from sector support structures.

The percentage of participants in the campaigns who received orders

In terms of beneficiaries in international trade fairs and marketing missions, the table below summarizes the responses of these beneficiaries to the question: “Did the promotional campaigns enable you to increase your international sales?”

Responses of beneficiaries about their increase in sales	Percentage
Yes, new orders were received and we delivered them regularly	19.0
Yes, new orders were received and some clients ordered a second time	14.3
Yes, new orders were received but there were production difficulties	16.7
Yes, new orders were received but there were difficulties delivering them outside the country	7.1
Yes, new orders were received but there were administrative difficulties (foreign billing, VAT, export and transit documents, etc.)	7.1
No, no new orders	4.8

Table 4: Increase in International Sales Following Promotion Campaigns

The report also showed that 19% of the participants in international trade fairs and marketing missions received new orders and were able to deliver them; however, most of them had production difficulties.³⁷ This point confirms the interest in modernizing the work businesses and independent artisans prior to their participation in promotional campaigns.

³³ See Table 12 of the promotional campaigns report, Annex 6.

³⁴ See Table 14 of the promotional campaigns report, Annex 6.

³⁵ See Table 12 of the promotional campaigns report, Annex 6.

³⁶ See Table 14 of the promotional campaigns report, Annex 6.

³⁷ See Table 12 of the promotional campaigns report, Annex 6.

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In terms of sales volume, the report found that 9.5% of participants in international trade fairs and marketing missions doubled their export sales. 78.5% of the participants had an average increase of 32% in export sales; 12% had no increase in export sales.³⁸

Some participants in the Fès focus group reported that they were in the process of finalizing some orders, particularly in the leather sector, in the United States (New York, Atlanta). In contrast, the Marrakesh focus group reported only weak returns and few orders being finalized.

Beneficiaries of national trade fairs

The table below summarizes the responses of beneficiaries of national trade fairs to the question: “Did the promotional campaigns enable you to increase your sales in the domestic market?”

Responses of beneficiaries regarding their increase in sales	Percentage
Yes, new orders were received and we delivered them regularly	64.3
Yes, new orders were received and some clients ordered a second time	40.5
Yes, new orders were received but there were production difficulties	23.8
Yes, new orders were received but there were difficulties delivering them	16.7
No, no new orders received	14.3
I just began the work	2.4

Table 5: Increase in International Sales Following Promotion Campaigns

The report also showed that 64% of the participants in national trade fairs received new orders that were delivered, and a majority of them received a second order.³⁹

In terms of sales volume, the report shows that 7% of the participants in national trade fairs had no increase in their sales; 28% of participants increased sales by 10%; 12% increased sales by 20%; and 5% doubled their sales.⁴⁰

Interviews with independent artisans in Marrakesh revealed that the Riad Art Expo brought them some results with international buyers who purchased samples, or with small orders from Moroccan hotels. In contrast, the exposition associated with the “Grand Prix” was viewed as disappointing. The artisans lamented that this was held at a location not normally devoted to sales, which they believe contributed to the weak turnout.

³⁸ See Table 13 of the promotional campaigns report, Annex 6.

³⁹ See Table 14 of the promotional campaigns report, Annex 6.

⁴⁰ See Table 24 of the promotional campaigns report, Annex 6.

4.2.4.2 The National Label

Conclusion: At the time when this report was being prepared, no enterprise had yet been labeled. It is therefore not possible to take a position on the effectiveness of labeling during this stage.

Review of the objective

This subactivity refers to a specific objective that is presented in the logical framework in annex: the identification of the origin of Moroccan handicrafts products and their valuation by consumers.

Cumulative number of very small businesses that used the label on at least one of their products

The pilot phase for 30 enterprises was not completed at the time of the evaluation, so no enterprise was yet labeled.

4.2.4.3 Tourism Circuits

Conclusion: It seems that changes relative to businesses linked to tourism in the two medinas are weak. However, this result should take into consideration the season (the low tourism season following Ramadan) when these circuits were put in place. If this result is coherent with the trend in Marrakesh of 23% of the average purchase of handicrafts products for tourism, the average purchase in Fès more than doubled, with an increase of 107%.

Review of the objectives

This subactivity refers to two specific objectives that are presented in the logical framework in annex:

- A sustainable increase in the incomes of independent artisans and SMEs linked to tourism markets
- An increase in the synergy between artisans and tourism.

Two indicators were given priority in terms of these two specific objectives.

Changes related to the activities of businesses linked to tourism in the medinas

Measuring the impact should take into account the fact that the tourism circuits were put in place at the start of the low season, which was followed by Ramadan. They have not yet had their full effect.⁴¹

The report on the beneficiaries shows:

- 29% of beneficiaries indicate that their sales did not change
- 33% of beneficiaries indicates that their sales increased by less than 10%

⁴¹ Source: Interview with the president of the CRT in Fès.

- Only 16% of beneficiaries indicate that their sales increased by 10% or more.

The Fès focus group revealed that the results are viewed in different ways by the artisans. Those who are included in the tourism circuits estimate that they have not reaped the “benefits” because of the change in the placements of the small and large signs, or the definition of the circuits and the content of the signs that sometimes mix up the nature of the trades and the sectors.⁴² In Marrakesh, the comments from the focus group were more positive: “the signs and their content whet the appetite of the tourists”; “we have not seen anything up until now, but in the future it is certain that there will be positive benefits”; “we’re still confident.”

The evolution in average sales of handicrafts products for tourists

The evolution in the average sale of handicrafts products for tourists is one of the expected results of the project.

The project impact report conducted by Solimar between June 2012 and June 2013 showed that in Fès and Marrakesh, average spending per tourist went from DH341 and DH557 in June 2012 to DH707 and DH689 in April 2013. This is an increase of 107% for Fès and 23% for Marrakesh.

However, it is difficult to know if these results can be attributed to the implementation of the tourism circuits, since the increase in average spending on handicrafts products by tourists depends on other factors.

⁴² This is particularly the case for embroidery and weaving.

4.2.5 Efficiency

4.2.5. Promotional Campaigns

Conclusion: Efficiency was judged to be good with regard to difficulties with the start-up of this subactivity. First there was a start-up delay due to late delivery of the “Report on Promotional Needs,” then due to the renegotiation of the contract because of differences in the reading of the Terms of Reference, and finally because of the need to launch a second campaign to select beneficiaries linked to a call for an expression of interest with little to do with the handicrafts context.

In terms of the quality of implementation, overall there were positive comments from the beneficiaries regarding organization, follow-up, and support, particularly for the international trade fairs and buyer visits. Feedback about the marketing missions was more mixed. The efficiency of the national campaigns was seen as weaker, particularly because of the dates of the exposition, which were not suited to the mobilization of national buyers, and a communication gap in that a number of participants would have preferred targeted actions, particularly towards hotels. Finally, only 40% of beneficiaries of the campaigns estimated that their participation enabled them to acquire new skills in promoting their products.

In general, participation in the promotional campaigns was strongly subsidized. This quasi-free approach was not adapted to the objective of increasing the capacity of enterprises to adopt a targeted market approach and could have negative repercussions on subsequent support efforts that do not offer the same level of largesse.

Expense commitments as of 22 May 2013 exceeded the initial budget by 20%.

Review of the expected results

To review, these are:

- SMEs adopting an approach that concentrates on the needs of exporters and importers and is based on the habits of clients according to their geographic location
- SMEs having the capacity to respond to the needs of the tourism and export markets
- Independent artisans using procedures that respect the environment and employing a targeted-market approach for the conceptualization, production, and sale of handicrafts products suited for tourism and export.

These results refer to indicators presented in the logical framework in the Annex and below:

- 16 events organized for independent artisans and SMEs: campaigns targeting national and international tourists⁴³
- 200 artisans participated in at least one trade fair (national or international) or business trip
- 30 events organized for SMEs
- 130 SMEs participated in at least one trade fair (national or international) or business trip

⁴³ Source: MEP, June 2012.

Modalities for the mobilization of resources

The need for a contract renegotiation

The following actions were planned: 5 international trade fairs, 10 national trade fairs, 6 marketing missions, 3 buyer visits, 5 media tours, and 3 “Marrakesh Artisan Expo” fairs.

A renegotiation⁴⁴ led to a reduction in the number of events (from 33 to 27) and a delay in the schedule for holding them.

- The “Marrakesh Artisan Expo” fair involved two editions with 180 artisans. For scheduling reasons, only one edition was held, although with 300 artisans (changing from 180 to 300)
- 3 media tours were carried out instead of 5
- Participation in 4 instead of 5 international trade fairs due to project delays that resulted in the schedule no longer coinciding with the trade fair season
- 5 marketing missions carried out instead of the 6 initially planned
- 4 national fairs associated with festivals carried out instead of the 10 initially planned, although with a larger number of artisans. This refocusing was necessary because the reduction in the period to carry out activities (from 17 to 14 months) meant that the timing no longer coincided with the important festival dates.

Efficiency of implementation

The need for a second campaign to select participants

In order to preserve the sensibility of the different artisan groups, it was decided that for the first campaign to select artisans and SMEs, the consultant would not intervene directly with the artisans. A first call for expressions of interest was thus launched through newspapers and the Chambers of Handicrafts. This first awareness campaign resulted in selecting only 200 of the 400 participants planned for. In fact, the call for expressions of interest was not appropriate for the handicrafts sector, especially considering that the sector is rooted in tradition, as in the case of Fès. However, PMU officials overcame this obstacle by organizing meetings on overarching topics in order to pass on the information.

It was thus necessary to undertake a second awareness campaign and selection process for participation in the promotional campaigns, even though this caused additional delays in the organization of activities.

National trade fairs

Overall, organization of the promotional campaigns and expositions was well received by participants in focus groups in Fès and Marrakesh.

Independent artisans interviewed from Marrakesh said that the duration of the exposition (3 days) was way too long given the preparation time that was required. Participants in the Fès focus group proposed organization periods as well as expositions lasting from 8 to 10 days.

⁴⁴ Dated 4 November 2012

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In general, it came out in the interviews with artisans in the focus groups that the dates selected were not well suited for the mobilization of national buyers.

At the same time, the artisans and SMEs noted a lack of communication, particularly with hotels in Marrakesh, which for them constitute a priority source of clients. They lamented the fact that no targeted action was carried out.⁴⁵

Marketing missions

The focus groups revealed that the organization of marketing missions and support for businesses were well received by the beneficiaries. However, they also revealed that there were difficulties in terms of contacts with partners in New York and Moscow. The beneficiaries had the impression that there was little publicity about the event. That’s why, according to them, there was no business-to-business contact in the traditional sense of the term. The beneficiaries were obliged to go out and look for clients on their own. During the Moscow mission, for example, the entire group participated in all of the meetings even though some meetings did not concern certain participants. The meetings should target the participants that they truly affect. The beneficiaries concluded that these missions were more a way to make to make buyers aware, as they did not know much about Moroccan handicrafts.

International trade fairs

The participants in the Marrakesh focus group unanimously agreed that organization was the strong point, particularly thanks to financial subsidies, assistance on the ground, and management. Follow-up and assistance by the organizers was also viewed favorably.

Buyer visits

The system put in place by the project for buyer visits was particularly well received by the buyers. In fact, it is customary that during these types of visits, the buyers visit the enterprises collectively. This type of arrangement can be sensitive, because buyers are often in competition with one another to find the enterprise that will provide them the product best adapted to their markets. The project provided them with private vehicles and then basically gave them total freedom to work as they wanted.

The consultant in charge of the international campaigns who was interviewed gave a representative example of the timetable to be met and the expected results. Following a marketing mission to the “New York Gift Show,” buyers from ABC Carpets and Home, a large New York store and a market leader (a store with a recognized influence over other buyers), participated in buyer visits in June in Fès. Enthusiastic about the diversity of the Moroccan handicrafts sectors, store officials wanted to put Morocco front and center in their promotional activities, and already scheduled new visits in February to select an agent and pursue their business interests further. This example demonstrates that in no case can the expected results occur immediately.

⁴⁵ Source: Marrakesh focus group and semi structured interviews.

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Financing mechanism put in place by the project

Participation in the campaigns by the artisans was free apart from the investment necessary for preparation. In addition, their preparation was associated with a risk premium of DH300 per day. At the same time, the project covered the participants’ travel costs, transport of merchandise, and lodging. Having the entire process free of charge is not coherent with the objective of increasing the capacity of the enterprises to adopt a targeted-market approach. In fact, their real-life sales situations towards which the project is directed is distorted by the fact that the businesses are not involved financially, which results in their not building fixed costs into their production costs.

Number of beneficiaries

The participants are organizations (SMEs, Cooperatives etc.) who participated in an event, in the name of the organization.

On the other hand, **the beneficiaries** are individuals, corporations or cooperatives that individually participated in the events.

To calculate the number of indirect beneficiaries, the method used is based on the direct/indirect ratio, developed on the basis of the results of surveys and research and consultations with experts in the field.

Type of Exposition	Participants & Benficiaires of AFM-4			
	Participants	Direct beneficiaries	Indirect beneficiaries	Total
Artisan Expo	301	119	2 380	2 509
Media Tours	73	13	260	273
International Trade Fairs	40	29	580	609
Buyer Visits	108	27	240	567
Marketing Missions	60	46	020	966
Expositions	196	196	3 920	4 116
TOTAL	778	430	8 600	9030
(Femmes: 30%, 26%, 52%)	(234)	(112)	(4 472)	(4 584)

Table 6: Participants & Beneficiaries of AFM-4⁴⁶

Disparities between the expected and real cost

With an original budget of US\$4,756,599, expense commitments as of 22 May 2013 exceeded the initial budget by 20%.⁴⁷ Despite several requests to the APP, we did not have access in detail (component by component) to the budget for this activity.

⁴⁶ Source: Carana consulting firm and PMU AFM-4.

⁴⁷ Source DLP of 22 May 2013.

Additional costs and delays

Late start of the activity

The project started with an initial planning schedule (June 2012) that reflected delays in the “Report on Promotional Needs” and negotiations with the consulting firm. Because of this, activities had to be carried out over a period of 14 months instead of the 17 months originally planned.⁴⁸

The tight schedules faced by the project made eventual negotiations difficult. Moreover, the project was constrained to accept first offers proposed without recourse to another call for bids.

Differences in the reading of the Terms of Reference made it necessary to renegotiate the contract, which cut short the duration of the project by six months. This made it necessary for the consultant to increase the size of the team in order to carry out the project in the remaining 7 months.

These delays precluded preparation for the summer fair season, thus making it necessary to reorganize activities. For example, planned participation in the New York trade fair in August 2012 was cancelled.

Repercussions of the reduced timetables for the preparation of presentations by the enterprises

Approvals from regional departments often arrived late, which in turn meant late approvals for the enterprises. Certain SMEs underlined the organizational problems, such as long waiting periods for the selection of participants in events and last-minute approvals, which left them little time to prepare. Some said they had little information in advance about the specifications of the fairs, and thus a reduced period of time to prepare products in a suitable manner.

⁴⁸ Source: PMA AFM 4.

4.2.5.2 The National Label

Conclusion: Implementation of the national label demonstrated the efficiency of the process of putting the label together, but there was less efficiency in the pilot phase and particularly in terms of communications. The quality of the work carried out is not in question, whether it involves the precise definition of the selection criteria and a perfectly-applicable labeling process by the DQRD, or the organization proposed for the method of governance, which brings together the relevant entities in order to guarantee effective functioning of the label. At the same time, the awareness and training sessions were well received by the beneficiaries. However, efficiency was weak for the pilot phase and for communications. In fact, the delay during the procurement process precluded the report from assessing the completion of the pilot phase and the support for the enterprises undertaking the steps for eligibility. The same goes for communication actions, which were seen to have been carried out too quickly, given that the label to date is not operational. In addition, it was not possible to assess the quality. The very technical aspect of introducing the label made it difficult to involve the final beneficiaries, but the institutions and actors in charge of the sector were involved. However, the lack of communication with the DQRD, which will be in charge of managing the label once the Compact is completed, is unfortunate. Expense commitments as of 22 May 2013 respected the initial budget.

Review of expected results

This involves the creation of a national label for Moroccan handicrafts, which has as its ultimate aim to stimulate tourist sales and exports of handicrafts products.

This result refers to the indicators presented in the logical framework in annex and below:

- Contract specifications validated
- Graphic standards specifications validated
- Approach to certification of the label validated
- Approach to governance of the label validated
- Label documentation, contract specifications, logos, graphic charts, etc.
- Promotional actions carried out
- Preparation of a communication-promotion plan

Modalities for the mobilization of resources

All of the managing executives surveyed considered that the resources that the project had at its disposal to carry out the project were for the most part adequate.

However, the significant delays in procurement resulted in a modification of the work plan, with a transfer of the work burden and the amounts allocated for the marketing strategy and the communication plan to promotion actions.⁴⁹

⁴⁹ Source: Interview with the consulting firm in charge of the activities & the PMU manager in charge of the label.

At the same time, the interviews revealed that the stakeholders, such as the Chambers of Handicrafts, the Federation of Handicrafts Enterprises, and the DQRD, were weakly associated with introduction of the national label.

Efficiency of implementation

Overview of handicrafts labeling

This resulted in the presentation of several scenarios involving labeling and their operational modalities. The consultant carried out work, for the most part documented, that enables the institutions to have a clear idea of the different possibilities and their respective adaptations to the specifics of the Moroccan handicrafts sector.

Development of the national label

This phase included defining the contract specifications and visual identity, standards for graphics, the labeling process, and the method of governance for the label. The national label is based on the definition of three levels of adhesion:

- Level 1 (Base Criteria and Collective Certification Brands)
- Level 2 (Good Management Practices)
- Level 3 (Social Responsibility of the Enterprise)

Documentary analysis and interviews with the consulting firms in charge of the activities indicate extremely clear, detailed, and operational work in the conception of the label. The detail of the labeling criteria will facilitate a careful interpretation of the circumstances of the enterprises. The labeling process will be easily applicable for the DQRD of the Ministry of Handicrafts, which will take responsibility for it. The method of governance integrates all of the stakeholders involved.

Training and awareness sessions for professionals and institutions

The Marrakesh focus groups revealed that the training and awareness sessions enabled the SMEs to recognize the strong cultural potential of Moroccan handicrafts: “above all, review and improve our products, but without affecting their authenticity and their unique aspects”; “we learned that our products are culturally and historically important, and we are trying to strengthen that more in the conception of them.”

For the awareness sessions, most of the beneficiaries were satisfied with the labeling criteria as well as the process. Fewer among them were satisfied with the governance model.⁵⁰

For the training of trainers, all of the participants surveyed during the report indicated that they could integrate this training in their routine training programs.⁵¹

For the training of auditors, most participants surveyed indicated that the labeling criteria, the labeling process, and the governance models seemed clear and appropriate to the Moroccan handicrafts context.⁵²

⁵⁰ Table 18, 19, and 20 of the label report, Annex 6.

⁵¹ Table 21 of the label report, Annex 6.

⁵² Tables 22, 23, and 24 of the label report, Annex 6.

Implementation of the national label in the pilot phase

Thirty candidatures validated by the DRAs and the Chambers of Handicrafts. At the end of the mission, assistance was being provided to support the enterprises during their process of becoming eligible.

Communications actions carried out too soon

The project carried out information campaigns directed toward the general public (targeted print press, electronic websites, radio, and TV), even though to date no enterprises have yet been labeled. Besides the weak relevance of the information campaigns, there is reason to be concerned that they had a negative impact on the credibility of the national label and on labeling in Morocco. These promotional actions thus risk jeopardizing the actions of the Moroccan government, which has invested for five years in the introduction of collective brands, the lynchpin of the national label.

Although the artisans participating in the focus group in Fès did not weigh in on the topic of the label promotion campaign, the Marrakesh focus group participants were quite clear: “We saw nothing at all.”

Development of a communication-promotion plan

The scenario of the Ministry of Handicrafts looks to improve the image of handicrafts and handicrafts products in terms of quality. The actions will involve interventions on national and regional radio, the three Moroccan television stations, and through general, economic, and specialized press outlets.

Validating the graphic chart, promotion tools, and particularly the content of TV spots necessitated the involvement of several institutions, which translated into additional delays and considerably more work for the consultant in charge of the activities.

Disparities between the expected and real cost

The initial budget was US\$1,100,000, and expense commitments as of 22 May 2013 were at 100% of that budget.⁵³ Despite repeated requests of the APP, we did not have access to the detail (component by component) of the budget for this activity.

Additional costs and delays

The interviews with the consulting firm in charge of the activities and the Project Management Unit revealed close collaboration. However, the consulting firm made mention of divergences in terms of the interpretation of the Terms of Reference, which necessitated considerable back-and-forth in order to validate the APP deliverables. At the same time, the consulting firm mentioned that the late launch of the activity in May 2012 made it difficult to put in place the support measures originally planned.

⁵³ Source: DLP, 22 May 2013.

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Involvement of beneficiaries:

At this stage of the project, the only direct beneficiaries are the 30 enterprises selected to be audited in the pilot phase.

The report⁵⁴ revealed strong involvement by the beneficiaries of training and awareness sessions at a level of 44% of the interviewees, with 19% involved in the conception and 37% involved in project implementation.

The Fès focus group participants indicated that they did not participate in the conception of the label, its definition, or the “techniques of labeling.” The Marrakesh focus group participants made reference to their participation in the Congressional Palace seminar, at which they were able to attend the presentations by specialists.

The lack of involvement of the beneficiaries in the conception of the label is quite understandable because it involves very technical matters. Therefore, they would be attending a subactivity for which their participation is not envisaged.

⁵⁴ See Table 9 of the label report, Annex 6.

4.2.5.3 Tourism Circuits

Conclusion: The activities were carried out in complete compliance with the contract specifications, despite considerably reduced implementation schedules. However, greater consultation among the three sectors involved – that is, tourism, handicrafts, and patrimony – would have contributed to mitigating the institutional and cultural difficulties observed during implementation. Despite the important actions taken to promote awareness, this was not perceived by the beneficiaries as a consultation that allowed them to express themselves. At the same time, it is important to note the ambiguity expressed by a number of beneficiaries with regard to the orientation signs, which could be understood simply as directions. In addition, regularly conducted information and promotion campaigns involving ad hoc presentations and thematic activities would have been more efficient than an ad hoc promotional activity.

Expense commitments as of 22 May 2013 respected the initial budget.

Review of the expected results

This involves increasing the synergy between handicrafts and tourism in order to improve sales of handicrafts products and promote the tourism circuits linked to handicrafts in the medinas of Fès and Marrakesh.

This result refers to the indicators presented in the logical framework in the Annex and below:

- 6 circuits updated in Fès
- 5 new circuits created in Marrakesh
- 228 orientation signs, 70 interpretative signs, and 10 information signs put up in Fès
- 186 orientation signs, 20 interpretative signs, and 7 information signs put up in Fès

Modalities of mobilization, resources, and competencies

All of the managing executives surveyed considered that the resources at the disposal of the project to carry out the activities were for the most part adequate.

This subactivity had a very slow start-up because, according to the project actors, the APP did not have sufficient expertise to respond to the legal constraints of the MCC. In the end this resulted in an implementation timetable initially set at two years being reduced to 13 months.

Efficiency of implementation

Making people aware

Introduction of this subactivity required the creation of a steering committee in Fès and Marrakesh in order to promote a participatory approach. In Fès, a very traditional city, this action led to disturbing the “order of the medina,” which obliged the consulting firm in charge of implementation to redo it several times in order to forge a consensus among the population and elected officials. In Marrakesh, numerous information and awareness meetings were held, but individual interviews revealed that the artisans felt that their comments were not taken into account. The remark of an artisan in the Marrakesh focus group is typical: “A meeting was organized at the Congressional Palace in Marrakesh...[and] during the meeting, which

was very official, we did not have the opportunity to express our point of view and our ideas [...] [W]e felt that we could not question the work that was already done, it was, in our view, too late to react, we could not go backward, the train had already left the station!”

At the same time, the representative of the Marrakesh City Council noted the importance of consultation and feedback activities conducted by the project. However, the effort to inform artisans and merchants on the circuits does not seem to have been very efficient. In fact, the interviews with artisans and merchants conducted individually by the consultant revealed that the grand majority of them knew nothing about the theme of the circuit where they were and often did not even know that they were part of a tourism circuit.⁵⁵

The inventory and geolocation of the circuits

It is necessary to take note of the performance of the consultant in charge of implementation of the subactivity, having succeeded in establishing a consensus in environments often resistant to change. It was necessary to develop interregional, inter-sectoral, and inter-professional consensus in both Fès and Marrakesh for the definition of the circuits.

The graphic chart and the content of the interpretation

Another activity of the consultant, a process of validating the graphic charts of the signs, had to be carried out independently in Fès and Marrakesh, with the ultimate obligation to make the charts coherent.

Introduction of signage

In Fès, the updating was guided by the willingness to redistribute entry and exit points of the circuits in order to promote accessibility of tourists to the medina.

Text of the orientation signs sometimes unclear

This point was raised by some artisans and by presidents of the fondouk associations. They do not understand the logic of the circuits because the directions indicated on the signs do not necessarily correspond to the shortest way to get somewhere. In fact, the circuits wind around and one often finds a sign indicating the destination of the circuit going one way, while the shortest way to get there is in the other direction. This ambiguity means that the orientation signs can be taken simply as signs that indicate directions. In Marrakesh, for example, the artisans are unhappy because they think that the circuit is arranged to promote the outlying areas such as the handicrafts area and Bab-Malah.⁵⁶ The critique of an artisan from the Marrakesh focus group is typical of a number of comments from the interviews: “some of the content of the signs is not correct, it needs to be corrected.”

Interpretation signs well received

⁵⁵ In response to the question, “Can you tell me what this sign means?” the grand majority indicated that it was to give directions, without making reference to the tourism circuit.

⁵⁶ Source: Meetings with artisans and merchants.

Visits to the medinas and interviews with tourists and artisans highlight that there is strong interest among tourists, particularly foreign tourists, in the interpretation signs: “they guide the tourist and get their attention.”⁵⁷

In order to reduce the ambiguity of orientation signs being taken to be signs that give directions, intermediary signs were put up that enable tourists to locate where they are on the circuit, particularly if they do not have maps.

Promotional tools, information documents, maps, booklets, commercials, etc.

The quality of the work done in conceiving and implementing the promotional tools (booklets directed toward tourism operators, maps of medinas in Fès and Marrakesh) is without question as much a part of the content plan as the graphic aspects.

Promotional campaigns for the circuits

The media strategy and public relations were based on two principles: an awareness campaign directed towards artisans and inhabitants of the medina, and a promotion campaign directed towards national and international tourists. This strategy sought to draw attention to the objectives, goals, and results. However, the survey of the artisans⁵⁸ found that most of them heard about the new tourism circuits from their colleagues (artisans or merchants), and rarely through the promotional campaign itself.⁵⁹ In terms of promotion directed toward tourists, information campaigns carried out regularly and featuring thematic presentations and events would have been more efficient as tools than an ad hoc campaign.⁶⁰

Difficulties with the cultural and institutional order

Interviews with the consulting firms in charge of the activities found that in Fès, merchants and artisans were motivated and enthusiastic because the tourism circuits were already in place. In contrast, there was much more resistance from inhabitants and beneficiaries in Marrakesh, where no tourism circuit whatsoever was in place.

Implementation of the tourism circuits suffered from a lack of consultation among the three sectors involved (tourism, handicrafts, and patrimony). Political willingness at higher levels to ensure cooperation among the different sectors was necessary for this type of project. That would have allowed for better involvement by all of the actors at the national level, particularly the Moroccan National Tourism Office (ONMT), Moroccan Society of Tourism Engineering (SMIT), and the Ministry of Tourism. For example, despite there being a SMIT project to create tourism circuits, no collaboration whatsoever was established with the AFM. This resulted in:

- Difficult negotiations with owners of properties where orientation signs were placed, the owners profiting by negotiating requests for permission from Caïds (local leaders).
- The need for the validation of tools for each Caïd area traversed by the circuit

⁵⁷ Source: Interviews with beneficiaries.

⁵⁸ Report on independent artisan and SME beneficiaries of the promotional campaigns, Annex 6.

⁵⁹ National press, radio, television – specialized tourism press – travel guides.

⁶⁰ Recommendation of the Fès focus group, Annex 7.

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- Difficulty in reaching consensus between the ministries, regional actors, and beneficiaries, with the medinas constituting a social structure very resistant to change
- Guides who considered the implementation of the tourism circuits as competition.

Discrepancies between expected and real cost

With an initial budget of US\$2,516,724, expense commitments as of 22 May 2013 were identical to that budget.⁶¹ Despite repeated requests of the APP, we were not able to access (component by component) the budget of this subactivity.

Delays

There were delays in the start of implementation of this subactivity due to the validation of the graphic chart and the signs, the closure workshop of 27 June confirmed the end of the activities.

Beneficiaries

The table below shows the sale of goods and/or services by artisans distributed according to the 11 tourism circuits of Fès and Marrakesh.

Marrakesh Tourist Circuits	Beneficiaries	Fès Tourist Circuits	Beneficiaries
No. 1: On the Tanner Path	1965	No. 1: Fès Jdid	117
No. 2: Wood	223	No. 2: Monuments and Souks	548
No. 3: 1001 Doors	73	No. 3: Handicrafts	1225
No. 4: Iron and Clay	1204	No. 4: Knowledge & Appreciation	254
No. 5: Needle and Thread	975	No. 5: Andalous Palace and Garden	19
		No. 6: Murals and Fortifications	25
Total from 5 Circuits	4440	Total from 6 Circuits	2163

Table 7: Distribution of Beneficiaries of Tourism Circuits⁶²

⁶¹ Source: DLP, 22 May 2013.

⁶² Source: APP.

4.2.6 Impacts

4.2.6.1 Promotional campaigns

Conclusion: Very encouraging impacts at the professional level, with more confident artisans who feel that they have acquired a better negotiating position and, above all, a strong awareness in terms of the need to modify or review the range of their products and take into consideration the need for a new strategy for sales and investments to reach new markets.

At the social level, one of the positive returns noted by the beneficiaries⁶³ is the fact that they developed skills such as networking, opening up to others, and communication. The comment of one participant sums up this spirit well as “stepping out of my isolation.”

At the institutional level, the essentially free participation in promotional campaigns could have negative effects for the organization of new events.

Professional level

Expected positive impacts

95% of the participants in promotional campaigns said that the project enabled them to acquire a better negotiating position and to have more confidence in the future. The experience with other projects of this type shows that these aspects are important for artisans and SMEs in terms of investments that can follow.

Expected positive impacts

There is a change in mentality. The participation of artisans in promotional campaigns without a doubt enabled some beneficiaries to undergo a change in mentality. One of the more positive returns of the international campaigns is without doubt the very strong awareness of the artisans of the need to modify or review the range of their products.

Also noteworthy is their awareness of the need for a new sales strategy (for example, repositioning traditional products that are typically Moroccan for the American market) and partnerships (finding local partners for the Russian market).

Finally, there is an awareness of the investments needed to reach markets still untouched.⁶⁴

Social level

Unexpected positive impacts

A significant proportion of the participants in promotional campaigns believe that the project gave them more free time for family life and more enriching relationships, as well as more comfort in their work. Above all, they feel the project helped them broaden their perspective.

Unexpected positive impacts

⁶³ See Fès and Marrakech focus groups, Annex 7.

⁶⁴ Idem.

One of the positive results of the national campaigns for the beneficiaries⁶⁵ is that they developed social skills (networking, openness, communication). We can also point to meetings with colleagues, knowledge of market trends, and innovations with certain products, as well as the development of professional knowledge (new products, primary materials, innovations). The comment of one participant sums this spirit up well as “stepping out of my isolation.”

Institutional level

Unexpected negative impacts

Replicability will be difficult due to the gratuity trap. The free participation by beneficiaries in promotional campaigns is very uncommon in these types of projects, for which, in general, stronger participation is required of enterprises, even in countries where the standard of living is much lower than in Morocco.

Moreover, this quasi-free participation by artisans and SMEs in commercial events could over time induce reticence among artisans to participate in new commercial events that do not offer the same conditions.

4.2.6.2 The National Label

Conclusion: Although the label is clearly defined, up until now the actions are too recent to assess any impact.

4.2.6.3 Tourism Circuits

Conclusion: The new tourism circuits contribute and surely will continue to contribute to diversifying and clarifying the handicrafts offerings in the medinas of Fès and Marrakesh. They are clearly identified by most tourists and by travel agencies showing a strong interest in the use of the “handicrafts” theme.

Economic level

Expected positive impacts

Although it is way too soon to see real impacts, the artisan-producers whose workshops are included in the tourism circuit now have direct access to tourists, in this way reducing the need for them to subcontract bazaar stands.

It is worth noting the very relevant comment by a professional in the tourism sector about the probable impact in Fez: “Following the introduction of the tourism circuits in Fès by the Agency for the Development and Rehabilitation of the Fès Medina, Tala Akbira Street, which had been overrun with imported products, was very naturally reoccupied by handicrafts products thanks to the trend in the number of tourists.” In this way, introducing the new

⁶⁵ See Fès and Marrakech focus groups, Annex 7.

circuits dedicated to handicrafts contributes to diversifying tourism offerings, one of the objectives of the Office of Tourism.⁶⁶

Social level

Unexpected negative impacts

The displeasure among artisans and merchants left out of the new circuits is normal. On the other hand, it is understandable that the creation or the new introduction of the tourism circuits is a selection process that leaves out some artisans from the new commercial opportunities. In Fès, these selections were dictated by the willingness to redistribute the point of entry and exit of the circuits to promote accessibility.

Tourism level

Expected positive impacts

In Fès and Marrakesh, respectively, 24% and 23% of tourists surveyed in 2012 knew that they were on a tourism circuit; by April 2013, those numbers were 56% and 40%.⁶⁷ Thus, the trend in the percentage of tourists who know they are on a tourism circuit is representative of the impact of this subactivity.

In Fès and Marrakesh, in April 2013, 100% of agencies wanted to receive promotional tools about the tourism circuits in order to distribute them to their clients.⁶⁸ Although tourist agencies obviously want promotion tools directed toward their clients, this information shows their real interest in the “handicrafts” theme that remains one of the major themes of tourism offerings in Fès and Marrakesh.

4.2.7 Sustainability

4.2.7.1 Promotional Campaigns

Conclusion: Apart from the creation of a commercial dynamic appropriate for this type of action, the sustainability of these types of events is subject to obtaining (for the artisans) Moroccan or international support or financing.

However, even if the clause of the Compact that stipulates putting in place financing “shared between the professional and public authorities” does not seem to be on the agenda, it is necessary to have the regular participation of a selection of artisans in the routine actions carried out by the Maison de l’Artisan, a Moroccan institutional entity in charge of promoting the handicrafts sector. The action of the Maison de l’Artisan thus aims to ensure the sustainability of the actions undertaken by the MCC.

⁶⁶ Source: Interview with Saadia Bouziar, Chief of Facilities and Investment Services for the Ministry of Tourism.

⁶⁷ Project impact report conducted by Solimar between June 2012 and June 2013.

⁶⁸ Idem.

The initial Compact document stipulates that “The Government envisions continuing support for the Artisan Promotion Project Activity after the Compact Term through financing from artisans and artisan cooperatives, traders and retailers, private enterprises, and public funds from national, regional and city administrations.” With regard to this clause of the Compact, no information about this type of organizational model could be obtained regarding either professionals or administrations.

However, the Maison de l’Artisan is the institutional entity that aims to provide professionals in the handicrafts sector with all of the assistance and support necessary in terms of marketing and promotion at both the national and international levels.

The action of the Maison de l’Artisan thus aims to ensure the sustainability of the actions undertaken by the MCC.

4.2.7.2 National Label

Conclusion: The sustainability of the national label seems assured. In fact, it is planned for the DQRD of the Ministry of Handicrafts to be in charge of management of the label. With the introduction of a system for the national standardization of handicrafts products, particularly certification, this directorate has acquired the necessary application standards and the collective certification brands that are the guarantee of its capacity to manage the label.

However, this sustainability requires an audit of the 300 units already certified as “collective brands” in order for the label to become sufficiently visible to be incorporated into a virtuous circle and to create demand by Moroccan businesses and buyers. It is only following this that a promotional subactivity will be relevant, because it will be supporting something that is real.

At the same time, it would be worthwhile to orient the collective brands toward growth markets such as building and decorating, where Moroccan tastes are expressed. Then, over a five-year time horizon, it would be worthwhile to involve labeled businesses in the cofinancing of the label through contributions consistent with their capacity.

First of all, it is important to remember that the signing of the agreement between the MCC and the Ministry of Handicrafts to support the latter in the labeling program was a prerequisite to the signing of the Compact.

Mode of governance of the label

The Label Management Unit (*Entité de Gestion du Label* - EGL) will be housed in the headquarters of the DQRD of the Ministry of Handicrafts. Its principal role will be to ensure management of the label, and it will implement and coordinate the following:

- The Committee for the Editing and Referencing of Labeling (CRRL), which must group the stakeholders concerned with developing handicrafts labeling criteria (Ministry of Handicrafts, Maison de l’Artisan, Moroccan Institute for Standardization (INDH), FEA, OMPIC, professional organizations, and associations, other ministries). However, this type of very technical work (criteria for labeling, usage regulations, etc.) will ultimately probably be carried out within the DQRD. For the editing and

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referencing of the collective brands, the DQRD already works through a network of master artisans and actors known in the sector.⁶⁹

- The Committee for Label Authorization (COL). The DQRD does not currently use this mechanism for the collective brands, but its use for the national label does not pose any problem for the DQRD. It will bring together figures from the handicrafts sector (7 figures from the artisan world and members of the EGL) and will meet biannually in order to officially validate the list of labeled artists as proposed by the EGL.

The labeling process

For the introduction of the collective brands, the DQRD relies on the ministry’s network of provincial and regional offices. A partnership made up of an agent from the regional/provincial office and an audit body in charge of enterprises and artisans solicits those regional/provincial offices. The DQRD currently works in collaboration with 15 auditing bodies (laboratories, testing facilities, experts).

Monitoring of compliance of the collective brands is assured, generally annually or every three years depending on the sector. The same frequency could be used by the DQRD without mobilization of additional resources.

Promotion of the label for Moroccan artisans and SMEs

In the post-project period, it is expected that a “permanent call for expressions of interest” with regard to the enterprises will allow for receiving applications from cooperatives, independent artisans, or SMEs. The limits of this mode of intervention for the handicrafts sector are known, particularly for independent artisans. However, to put in place the collective brands, the DQRD already relies on the ministry’s network of provincial and regional offices. The dissemination of information about the label will therefore be done in parallel.

In addition, the training of trainers conducted as part of the project and directed toward officials of the training institute will enable the trainers to inform their students about the concept of the label, thus contributing to the dissemination and awareness of the label among the enterprises when they incorporate them.

Promotion of the label in Morocco and internationally

This component should be implemented by the Maison de l’Artisan, an institution in charge of promotional activities for the handicrafts sector.

Future participation of enterprises, cooperatives, and artisans in cofinancing of the label

For the entire labeling system, the participation of enterprises in cofinancing is a guarantee of the label’s credibility and sustainability. In the current case, in terms of the enterprises paying an annual fee to participate in the project over a time horizon of five years, the report shows that it is more likely that the SMEs will “play the game.” Participation by artisans, on the other hand, will be more difficult.

⁶⁹ With regard to pottery, for example, Ben Makhoul of Fès, Bel Mustapha of Salé, and Serghini de Safi and Ajbali of Marrakesh.

4.2.7.3 Tourism Circuits

Conclusion: The maps printed for the medinas of Fès and Marrakesh are important because they provide tourists with knowledge & information about the location and layout of the medina. The reissuing of the promotion documents linked to the tourism circuits, particularly the maps, to date is still not assured. Specifically, the CRTs of Fès and Marrakesh still do not have specific budget line items for them. Nevertheless, research into financing from their regular donors – in collaboration with the Chambers of Handicrafts – is programmed.

Viability of the actions undertaken

A “tourism circuit” agreement was signed⁷⁰ by the local authorities and the sectoral operators in order to ensure the sustainability of the installations put in place.

Maintenance of the signs was handled by Wilaya, the City Councils, Regional Councils, neighborhoods, and the Méchouars. There exist financing mechanisms handled by Wilaya.

The sustainability of promotion through the reprinting of paper materials and the maintenance of the Internet site are handled by the Regional Tourism Committee and the Chambers of Handicrafts. However, the CRT in Fès is not in a position in the current year to ensure publication of the maps and flyers. Specifically, for three years it has not had budget line items from the Commune. It does have, however, the budgets of the ONMT, although the programming of additional budgets can only be done from one year to the next, so at best the printing of the promotional materials for the tourism circuit could not be done before 2014. The CRT of Marrakesh has a framework agreement with the City Council for DH1 million that already includes a line item for signage. It also benefits from support from Wilaya and the ONMT. However the CRT director mentioned that he does not currently have budget lines for the reprinting of documents conceived within the framework of the project, although CRT is disposed – within the framework of the agreement of 18 March 2013 – to collaborate with the Chamber of Handicrafts to find the resources necessary for the reprinting. At the same time, the CRT has a project to integrate the tourism circuits into its package of communications and promotion tools. It also wants to use the mapping work that was done to create a map that identifies the locations of artisans in the region of Marrakesh.

Thus, whether for Fès or Marrakesh, the CRTs to date have not put in place budgetary lines for the reprinting of promotional materials about the tourism circuits. Having those budgetary lines – in partnership with the Chambers of Handicrafts – cannot be expected before 2014.

For maintenance on the Internet site, the competencies within the CRT and Wilaya still need to be identified. Nevertheless, the amount of training planned (2 half-days) seems to considerably underestimate what is necessary to take ownership of the tool and the means to enrich it in order to optimize its impact.

⁷⁰ 18 March 2013 in Marrakesh and 3 June 2013 in Fès.

4.2.8 Gender

The level of participation of women is approximately 25%, but the figure is probably higher because women have a large presence in the product manufacturing chain.

4.2.8.1 Promotional Campaigns

For the selection of the beneficiaries, a level of 30% for women – defined as realistic by the PMUs – was used by the project.⁷¹

Despite the fact that this percentage is lower than the standard typically used for this type of project, a “realistic” percentage represents a step forward.

The table below shows the distribution of the number of beneficiaries by type of exposition.⁷²

Types of Expositions	Percentage Female
National	17
Expo Artisan - Marrakesh	25
Media Tours	0
Buyer Visits	11
Expositions	32
International	21
International Trade Fairs	24
Marketing missions	17
TOTAL	26

Table 8: Distribution of Female Beneficiaries by Type of Exposition

The table showing the distribution of the net number of beneficiaries by status, locality, and gender presented in the annex provides the following information:

- 28% of independent artisans participating in promotional campaigns were women
- 52% of participants from cooperatives in the promotional campaigns were women
- 14% of independent artisans participating in the promotional campaigns were women

⁷¹ Source: Interview with desk officers from the PMUs.

⁷² Source: Carana.

4.2.8.2 The National Label

For the awareness and training sessions about the national handicrafts label: 111 women out of a total of 435 participants. This represents about 25.3%.

The list of potential participants in the pilot phase⁷³ has 8 women out of a total of 30 participants, a percentage of 26%.

⁷³ Support phase for production units for the adoption of the national label.

4.3 Support for Production

4.3.2 Relevance

4.3.2.1 Training of Potters

Conclusion: The relevance of this subactivity is recognized because it corresponds perfectly to the principal expectations of potters.

However, the training periods were judged to be inappropriate. In addition, the duration of the training sessions was judged to be too long and the training periods too short. Thus, there is a sense that the project gave priority to certain aspects of productivity during organization of the trainings, grouping them into a short period with training times too long to sustain the attention of people unaccustomed to participating in courses.

Spreading these trainings over a period of at least a year and reducing teaching time to a maximum of three hours would certainly have allowed for better assimilation of the knowledge taught.

Increasing incomes is the main reason why potters participated in the training. Next in line in order of importance are improving the quality of products and improving production techniques. Reducing pollution comes last.⁷⁴

Whether in Fès or Marrakesh, the training periods were inappropriate: “right before the Aïd-El-Kébir holiday, just when we have the most activities!”⁷⁵ This remark from the focus groups is confirmed by the many interviews conducted with potters. For example, in Mzouda, the training dates coincided with the production season. The beneficiaries would have preferred for them to be held during the two months that followed Ramadan, the period when they typically take their vacations.⁷⁶

The training sessions for the potters were also too long; they would have preferred two-hour sessions over longer periods of time. However, the report revealed a divergence of opinion, with more than 70% of potters affirming that the training times were convenient for them in terms of their family life and professional activities.⁷⁷

Regardless, the importance of this issue is clear from the fact that questions about the time periods, hours, and duration of the training were often the main topic of discussion during interviews with the potters.

⁷⁴ See Table 12 of the production report, Annex 6.

⁷⁵ Remarks from the Marrakesh and Fès focus groups, Annex 7.

⁷⁶ Remarks from the Marrakesh focus group, Annex 7.

⁷⁷ See Tables 25 and 26 of the production report, Annex 6.

4.3.2.2 Replacement of Traditional Kilns with Gas Kilns

Conclusion: The relevance of this subactivity is recognized because it corresponds to the future needs of the trade of potters, who in the very near future will be required to meet environmental standards.

At the same time, the expectations of the potters’ clientele for them to produce new products demands a mastery of quality for some of their high-value production – such as pottery – that can only be achieved with the advantages of more elaborate kilns than those that they routinely use.

The reasons why the potters requested the purchase of gas kilns are as follows, in order of importance:⁷⁸

- The conditions of the subsidy (31%)
- To improve quality (24%)
- To become compliant with environmental standards (23%)
- The technical advantages of the new kilns (21%)
- The facility of using gas kilns (21%).

Although the subsidy clearly corresponded to the needs and expectations of the potters to transition toward modern production tools, their desire to improve quality also revealed a demand in this sense – often unstated – from their clients. Attaining this quality is an outcome of the technical advantages brought about by the new kilns.

In addition, the potters are to date subject to pressures from institutional orders or from local residents with respect to environmental standards. Compliance is therefore a recognized concern.

4.3.3 Coherence

4.3.3.1 Training of Potters

Conclusion: Although this subactivity is completely coherent with national policies, it is less coherent with the conception of the project and the specific objectives because the period when the training was conducted was much too short to sufficiently address the situation on the ground and the capacity of artisans to assimilate and apply what they learned.

Similarly, the objectives of the training were judged to be too ambitious relative to the capacity of the artisans to absorb what they were expected to learn. Therefore, certain actors should have significantly lowered the level of their courses.

Coherence with national policies and other donors

Morocco is undertaking a process of economic dynamism and the creation of value added that can be seen in all of the strategies adopted for the development of artisans and SMEs. More

⁷⁸ See Table 44 of the production report, Annex 6.

specifically in terms of environmental aspects, Morocco signed an international agreement to protect the environment and improve living conditions. To give an example, most of the actors interviewed were aware that in the short term, exportation and marketing of *tajine* that contain lead will be prohibited in Morocco.⁷⁹ These actions to strengthen the capacity of artisans, including all of the factors critical to developing enterprises and addressing environmental aspects, are perfectly coherent with national strategies.

Coherence between the conception of the project and the global and specific objectives

In order to meet the schedule to implement the program and to reduce training costs, the activities were carried out over a period considered by the beneficiaries to be too short. A longer period would have assuredly enabled the artisans to better absorb what they learned, that is, “to give what another is capable of receiving” in order to improve the quality of products, increase production capacity, and improve production techniques.

Alignment between the measures implemented and the objectives and timetables

All of the interviews with the actors confirmed that the resources available were for the most part adequate. However, the training objectives for the five modules were too ambitious relative to the capacity of the artisans. Interviews with trainers showed that they were obliged to adapt to the training content in light of operational constraints.

4.3.3.2 Replacement of Traditional Kilns with Gas Kilns

Conclusion: This subactivity has average coherence. It is perfectly coherent with national policies related to the protection of the environment and persons. It forms part of the logic behind the Moroccan handicrafts sector largely supported by the different ministries in charge of the sector.

However, the conception of the project in no way took into account local potential in terms of the furnishing of local gas kilns, giving priority from the start to imported kilns. There were many prior experiences from which the project did not draw and which could have formed the basis for the manufacture of local kilns directed toward local uses and perfectly adapted to the capacity and needs of Moroccan potters.

Coherence with national policies and other donors

Morocco signed an international agreement to protect the environment and improve living conditions. Thus the activities direct toward replacing traditional kilns harmful to the environment fit perfectly within this vision. The MCA Project’s “Replacement of Traditional Kilns with Gas Kilns” subactivity was conceived as part of the activities managed by the Ministry of Handicrafts since 1995 through projects to substitute traditional kilns with gas kilns (from Oued Laou to Tétouan, Bougharte to Demnate, Safi, Salé etc.) and the INDH, whose activities included installing 18 gas kilns in Marrakesh between 2007 and 2009.

⁷⁹ Potters are already commenting on unsolicited interventions from officials assigned to control the presence of lead.

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Part of the cofinancing offered to potters in the process of acquiring kilns is supported by the National Fund for the Environment (*Fond National pour l'Environnement* – FNE), which contributes 40% of the acquisition cost.

Within the framework of the UNDP/FEM microcredit program, the Center for the Regional Development of Tensif provided support in 2003 for a local builder of gas kilns. At the time, this support allowed for reducing the cost of acquiring a kiln from DH40 million to DH7 million.

A locally produced kiln was developed by the Ministry of Handicrafts in collaboration with the Mohammedia School for Engineers. This atmospheric brick kiln, which uses gas, cost DH80000.⁸⁰

Coherence between the conception of the project and the global and specific objectives

This type of project is commonly used to support the handicrafts sector – that is, making cofinancing available to artisans to enable them to acquire production tools. However, in the context of the very traditional pottery sector, the project did little or nothing to take into account two factors.

First, the project ignored the strong unwillingness of this group to collaborate with the banking sector and did not study additional solutions, such as the principle of mutual caution⁸¹ often used in such cases.

Second, there was insufficient exploration of so-called “appropriate technology” solutions based on the local supply of kilns. In fact, the project did address a so-called alternative solution, but in a way that was for the most part inadequate. It seemed that previous experiences – for example, the work by the Mohammedia School for Engineers cited in the previous section – were not studied.

⁸⁰ Cost incorporates the bricks for the kiln.

⁸¹ Made up of a group of three beneficiaries; each of the parties benefited from the guarantee of the other two.

4.3.4 Effectiveness

4.3.4.1 Training of Potters

Conclusion: The effectiveness of the training was weak. Specifically, there was an increase in incomes and profits of less than 10% for three-quarters of the potters trained. This point is confirmed by the weak progress in sales, with 89% of the potters showing an increase in sales of less than or equal to 10%.

In contrast, for the five modules, the report found that the rate of adoption of practices recommended by the project was higher than 50%. However, assistance would have been needed to apply what was learned – “there was a missing link: assistance,” “made do with it” – and for putting what was learned into practice.

In fact, among potters, the number that said they adopted the recommended practices ranged between 53% and 68%. In the view of the consultant, these figures do not correspond to the reality of what was observed during visits to workshops and in interviews with potters. Very few examples of practices recommended by the project were actually observed. The artisans understood the rationale for implementation, which in itself constitutes a worthwhile result, but putting what they learned into practice was constrained by the lack of assistance.

The positive view of training on safety, which is reflected without question in the awareness of the potters, should also be noted.

Review of objectives

This subactivity refers to three specific objectives that are presented in the logical framework and in annex:

- The contribution to the increase in income of artisans
- Improvement in the quality of handicrafts products
- Improvement in production techniques.

Average annual income of individual artisans and employees

The report⁸² showed a small increase in sales by beneficiaries following the training. 44% of the participants had no increase in their sales to the local market; about 45% of the participants had an increase in sales of less than or equal to 10%; and only 8% said their sales increased by 10% to 25%. No increase in sales was noted for exports.⁸³

In terms of incomes, the report⁸⁴ found that following the training, 78% of those trained recorded increased incomes⁸⁵ and profits⁸⁶ of less than 10%.

⁸² See Table 34 of the production report, Annex 6.

⁸³ See Table 33 of the production report, Annex 6.

⁸⁴ See Table 66 of the production report, Annex 6.

⁸⁵ For independent artisans.

⁸⁶ For enterprises.

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Percentage Increase in Revenue	Percentage of Potters
0%	30
10% or less	48
From 15% to 25%	11
From 30% to 60%	8

Table 9: Post-Training Income Trend

The focus groups indicated that participants were unable to significantly increase their incomes due to the difficulty of putting what they learned into practice.

Finally, the statistical report⁸⁷ showed an average variation in incomes of potters of 9.6%.

Therefore, taking into account the baseline showing annual income of US\$4351 (see MEP, June 2012), average annual income is estimated at US\$4769.

Number of potters trained

Location	Fès	Marrakesh
Number of Artisans Trained	938	1394
Total Number of Artisans Trained at the 5 Sites	2332	

Table 10: Distribution of Artisans Trained⁸⁸

Potters who adopted practices recommended by the project as a proportion of the number of potters trained

Training techniques modules

16% of artisans said that after the training they put into practice new pottery shaping or enameling techniques.⁸⁹ In Fès, participants in focus groups said they particularly liked the training on the mixing of enamel colors and on the components of clay and its regional specificities. New techniques such as molding were tested in Mzouda after the training.

Design training modules

29% of the artisans said that after the training they came up with new products on their own.⁹⁰ The interviews revealed that the potters became aware of the need for their production to evolve. They are open now to new forms and colors and understood the need to accept making new products: “they woke up to the importance of design.” This needs to be

⁸⁷ See question 66 of the production report, Annex 6.

⁸⁸ Source: Final report on the operations and evaluation of training, June 2011.

⁸⁹ See Table 37 of the production report, Annex 6.

⁹⁰ See Table 36 of the production report, Annex 6.

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associated with buyers inciting the potters to make new shapes. It is this combination of training and contacts with buyers that leads the artisans to invest more in creativity.

Marketing training modules

30% of the artisans said that after the training they started using new marketing practices.⁹¹ The interviews in Marrakesh (Tamesloht and Essada) showed that these practices only involved preparing a few photos and presenting them to retailers in the souks. Some artisans started to use business cards and catalogs. However, the comment of an association official – “it’s the technique that’s most important for sales” – is representative of the attitude of a large majority of the potters interviewed.

Management training modules

27% of the artisans said they modified the management of their enterprise.⁹² In Marrakesh (Ourika, Mzouda), for example, this involved putting in place bookkeeping procedures, becoming aware of the expenditure associated with each cushion, and distinguishing between revenue and income.

Training modules on social, safety, and environmental aspects

36% of the artisans said they modified their work routines in order to better guarantee their safety and that of their employees.⁹³ The potters are very aware of the dangers associated with their habitual practices. Thus, certain traditional practices are disappearing, such as treating a wound by placing lead enamel on it. In Essada and Mzouda, all those who use a locally produced gas kiln purchased fire extinguishers. They replaced lead enamels with imported enamels that they say they like, despite the higher price.

Rate of adoption of good practices by artisans trained

Responses to Questions in the Report on Good Practices	Percentage
Rate of adoption by artisans of good practices taught: production techniques	68.75
Rate of adoption by artisans of good practices taught: design	54.68
Rate of adoption by artisans of good practices taught: marketing	53.12
Rate of adoption by artisans of good practices taught: enterprise management and the environment	53.84
Rate of adoption by artisans of good practices taught: hygiene and safety	65.62

Table 11: Rate of Good Practice Adoption⁹⁴

⁹¹ See Table 35 of the production report, Annex 6.

⁹² See Table 38 of the production report, Annex 6.

⁹³ See Table 39 of the production report, Annex 6.

⁹⁴ See the results of the production report, Annex 6.

Difficulties in putting lessons learned into practice

The artisans surveyed in the focus groups in Fès and in interviews in Marrakesh emphasized that it was impossible to put into practice what they learned. They mentioned the difficulty of mobilizing the resources needed. For example, in Ourika, demonstrations were given using a specific catalyst (for rapid drying) that they cannot find in the region and do not know where to buy.

Finally, the interviews with the potters and trainers showed that assistance would have been needed in order to put what was learned into practice.

Safety at the heart of the concerns of potters

The environmental and safety training of the component on “Implementation of Measures to Mitigate Negative Impacts” was praised by all of the potters.

Most of the actors in charge of the project who were interviewed said that all of the awareness activities, the many meetings to establish the project, the large and lively debate incited by the project regarding the replacement of traditional kilns, and the different legal guidelines concerning the prohibition of traditional kilns contributed to an awareness among the potters about environmental and safety issues.

In addition, although at the start of the project most artisans (a population little inclined by nature to change) were resistant, once the gas kilns were installed this point was no longer a stumbling block. This is a significant result of the project.

4.3.4.2 Replacing traditional kilns with gas kilns

Conclusion: To date, the effectiveness of this subactivity is very low. Six kilns are still being installed and only two are currently productive, and none of the potters who acquired a gas kiln have reported an increase in company profits thanks to the new gas kilns. This result is confirmed by the fact that they have not recorded any increase in sales.

Although the kilns are not yet being used for production purposes and the artisans cannot yet make a statement, the interview conducted with the one potter⁹⁵ who has started production shows that none of the potteries broke during his first production batch. It is therefore highly likely, that the objective of achieving less than 5% of broken products will be reached.

At the same time, the vast majority of those who bought imported kilns also continue to operate traditional kilns. Therefore, their acquisition of gas kilns through the project does not contribute to lessening the negative environmental impact.

Review of the objectives:

This subactivity refers to three specific objectives which are further presented in the logical framework of annex:

- Contribute to increasing the artisans’ income

⁹⁵ Boubaker Khazif, who acquired a gas kiln in Marrakech (Tamesloht)

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- An increase in production capacity
- Reduce the negative impact on the environment caused by traditional kilns

Average annual income of the individual and employed artisans:

The survey shows us that none of the potters who received a gas kiln has reported an increase in the company profits thanks to the gas kiln⁹⁶. This result is confirmed by the fact that six of the eight potters who received a gas kiln report that the gas kilns led to no change in their sales on the national or international market⁹⁷, as far as they had observed.

This result needs to be seen in context, since at the time of writing, only two of the eight kilns acquired during the project were operational. The owners of the six remaining kilns are still installing them or have not yet launched production.

Number of potters who adopted 60% of the practices recommended by the project concerning the use of the gas kilns:

The *baseline* contained in the MEP (Monitoring Evaluation Plan) shows the following result: 60% of the user guidelines concerning gas kilns were adopted.

On the basis of 144 acquired kilns, this result was not achieved. However, if one considers only the 8 potters who acquired kilns, this result was achieved. Indeed, five of the eight potters who obtained a gas kiln through the project felt that the specific training sessions on safety issues allowed them to better understand the concepts of security⁹⁸.

The average number of broken pieces of pottery during firing compared to the total number of pieces fired:

Most of the potters who received a gas kiln cannot give any information on the number of pieces which broke during firing, since they are still conducting trials⁹⁹. At the same time, five potters out of the eight who received a gas kiln state that the firing – with the gas kilns – has not (yet) allowed them to obtain the desired glaze quality¹⁰⁰.

To date (kiln trial period), the survey shows a “pottery breakage rate” of 25%.

However, this number should take into account the fact that it only concerns the 8 kilns which were bought through the project and that 7 of these are still in the trial phase. Therefore, this percentage is not representative of the number of broken pieces caused by a fully operational kiln. On the other hand, individual interviews with the one potter who has commenced production (Boubaker Khazif, who acquired a kiln in Marrakech -Tamesloht) shows that during his first production batch not a single piece was broken. It is therefore very likely that the objective of achieving a breakage rate of less than 5% will be reached very quickly.

⁹⁶ See table 79 in the production survey, annex 6

⁹⁷ See table 78 in the production survey, annex 6

⁹⁸ See table 48 in the production survey, annex 6

⁹⁹ See table 72 in the production survey, annex 6

¹⁰⁰ See table 73 in the production survey, annex 6

Job creation:

None of the potters who received a gas kiln have created any jobs for men or women¹⁰¹.

Reducing the negative impact on the environment caused by traditional kilns:

The survey shows that six of the eight potters who received a gas kiln think that replacing their wood-fired kilns led to them being less polluting¹⁰². However, six of the eight potters who received a gas kiln say that they have not given up their former production method using wood-fired kilns¹⁰³.

Indeed, the vast majority of those who acquired imported kilns also have wood-fired kilns which they continue to use. Their acquisition of a gas kiln through the project therefore did not contribute to reducing the negative environmental impact.

4.3.5 Efficiency

4.3.5.1 Training of potters

Conclusion: The efficiency of the training sessions is good. Nevertheless, although the potters were globally in favor of conducting such training sessions, the sessions were perceived as being very theoretical. The heterogeneity of the participants, some of whom were illiterate, was perceived as a handicap. The participation of some artisans in different session within the same module shows that on the one hand, the artisans found it difficult to apply what they had learned, whereas on the other hand it shows the great interest they have in these teachings.

Expected results:

They are expected to be seen by the potters implementing basic marketing, management, and design practices, as well as implementing new production techniques and social, environmental and safety rules.

These results refer to the indicators presented within the logical framework of the annex and below:

- 2332 identified / trained artisans
- Number of potters who attended at least one training module
- Artisan participation rate in 1, 2 and 3 modules

Implementation modalities:

The individual interviews as well as the activity mission report mention that unfortunately, the start of the project coincided with the destruction of traditional kilns in some sites, which led to some of the artisans being reluctant to participate in the training cycle. Later, the artisans’

¹⁰¹ See tables 70 and 71 in the production survey, annex 6

¹⁰² See table 68 in the production survey, annex 6

¹⁰³ See table 85 in the production survey, annex 6

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economic situation often led to them being unable to take part in more than one training module¹⁰⁴.

Implementation efficiency:

The identification study

The project enabled the creation of a precise data base in order to identify the artisans. This tool was highly appreciated by the sectoral PMU representatives in Fez and Marrakech.

Training sessions that were too technical, but which opened new perspectives

“Thanks to the training we received, we now have a clearer vision of what we want, of what we can do”. These statements made during the focus groups in Marrakech show that one of the big achievements of the five training modules was to show the artisans the scope of possibility that their profession offers them as well as broadening their horizons. However, in general, the focus groups and interviews¹⁰⁵ show that, although the content, methods and logic of the training sessions was highly appreciated, they were perceived as being too theoretical: “there was hardly any space for practical aspects”. At the same time, the survey shows us that 47% of the artisans appreciated the way in which the activity and the training sessions were carried out.

Literacy activities

The focus groups reveal that some participants were completely illiterate and that they could not follow the training courses and therefore benefitted very little from them – especially the modules on marketing and design. This also meant that these students were holding the others back. Therefore, the heterogeneity of the beneficiaries reduced the efficiency of the training sessions.

Results of the satisfaction survey carried out after the training sessions

The following table shows the results of the evaluation of the training activity, which was carried out by the consultant in charge of the activity. The scale ranges from 1 to 4, with 1 being the lowest score and 4 being the highest¹⁰⁶.

	Overall satisfaction	Quality of the organization	Reaching the objectives	Quality of the program content	Teaching skills of the training staff
All sites and all modules	3,85	3,79	3,73	3,83	3,83

Table.12: Satisfaction rate of the artisans after the training sessions

¹⁰⁴ Source: CIDE report

¹⁰⁵ Source: dedicated focus groups in Fez and Marrakech and interviews carried out in Tamesloht and Ourika, annex 7

¹⁰⁶ Source: Final report on the running and the training evaluation, June 2011

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It should be noted that “Reaching the objectives” scored lowest among the artisans. This is confirmed by the current evaluation.

Number of trained beneficiaries and number of modules attended:

The following table shows the number of trained artisans per module at the five sites¹⁰⁷ :

Module / Site	Fez	Tamesloht	Mzouda	Amizmiz	Saada	Ourika
Management	447	61	162	71	74	127
Production	349	108	102	37	30	118
Design	314	34	267	33	116	135
Marketing	343	76	203	53	70	103
Health, Safety, Environment (SSE)	320	70	125	73	127	78
Total number of artisans in all modules	938	187	576	115	313	203
Total Fez and Marrakech	938	1394				
Total number of artisans trained at the 5 sites						2332

Table 13: Distribution of the trained artisans by module and by site

¹⁰⁷ Source: Final report on the running and the training evaluation, June 2011

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The following table gives the percentage of artisans per number of modules they attended¹⁰⁸.

Percentage / Site	Fez	Tamesloht	Mzouda	Amizmiz	Saada	Ourika
Average real attendance (number of modules per artisan)	1,97	2,06	1,64	2,8	1,51	2,72
% of artisans who attended 1 module	56,1%	42,8%	65,6%	37,4%	75,1%	33%
% of artisans who attended 2 modules	17,1%	27,8%	16,3%	12,2%	11,2%	18,2%
% of artisans who attended 3 modules	10,9%	16,6%	9%	16,5%	6,7%	12,8%
% of artisans who attended 4 modules	7,7%	7,5%	6,3%	11,3%	2,9%	17,2%
% of artisans who attended 5 modules	5,3%	4,3%	2,3%	12,2%	2,9%	17,2%
% of artisans who attended 6 modules	2,9%	1,1%	0,3%	10,4%	1,3%	1,5%

Table 14: Module participation rate in relation to the site and the number of modules

The consultant in charge of the activity mentioned that in spite of the encouragement to get the artisans to vary the modules they participated in, many artisans preferred to attend the same module repeatedly, probably because they were interested in it, or because they wanted to better internalize the topics covered, or in order to optimize their learning¹⁰⁹. This remark is important for two reasons: on the one hand, it shows us that the artisans appeared to have difficulties in taking in the lessons received and on the other hand, it shows that they have a strong interest in the lessons.

Differences between the planned cost and the actual cost:

In spite of various requests made to APP, we were not granted access to the budget for this subactivity.

Additional costs and delays which were observed:

No significant delay was noted for this subactivity.

Beneficiary involvement:

Involvement of associations

The interviews carried out with the beneficiaries show that often, associations were heavily involved.

¹⁰⁸ Source : Final report on the running and the training evaluation, June 2011

¹⁰⁹ Source : Final report on the running and the training evaluation, June 2011

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In Ourika, the association was heavily involved in organizing the training sessions by implementing a participation plan for each member. This led to a very low level of absenteeism.

In Essada, the association participated in raising awareness among artisans. In order to overcome the absence of compensation it was decided to involve the organization in the provision of meals so that it too may benefit.

In Mzouda, the artisans also negotiated for the catering budget for the training sessions be managed by the association. The president of the association decided to spend the money made on equipping a workshop with molds. Some members would have preferred to receive compensation. Interviews with the potters revealed that significant debates took place concerning their wish to manage the budget of 150 Dirhams per artisan themselves, as the project has originally intended. One of the service providers summed it up in one sentence: “organizational decisions should be taken at the local level, and the central level should merely supervise”.

Beneficiary involvement

The artisans feel that they were only loosely involved in designing the training sessions. The survey¹¹⁰ thus shows that 63% of the participants felt that they were not involved. The interviews revealed that although some awareness had been raised, the level of dialogue was minimal, especially in Mzouda.

¹¹⁰ See table 15 in the production survey, annex 6

4.3.5.2 Replacing traditional kilns with gas kilns

Conclusion: With an initial objective of the artisans acquiring 144 kilns through the project, only 8 have been delivered to date, which represents 5% of the initial objective. An order of 12 kilns is currently being processed. The efficiency of this subactivity is therefore very weak.

Although the gas kiln demonstrations did prove to the potters that imported kilns would allow them to obtain the same results as working with wood-fired kilns would, the project phase concerning the gas kiln acquisition with help from the project ran into several difficulties, such as the artisans’ reluctance to enter the formal economy and to collaborate with banks, and especially the cultural resistance which was exacerbated by company leaders lobbying against it since they feared competition on the market – especially in Fez. At the same time, the decision to launch a call for tenders by the project beneficiary associations before purchasing the gas kilns led to the producers of imported kilns being pushed out of the market and resulted in the delivery of kilns which were different from the ones shown during the demonstrations.

Another main reason why the artisans did not support the project was the fact that the imported kilns and the buying conditions suggested by the project and by the banks were not adapted to the potters’ needs. Indeed, the vast majority of potters produce low cost products (such as bricks or tiles) which means that they cannot easily support the costs of using an imported kiln. Furthermore, the conditions of payment suggested by the banks are much more restrictive than those that local kiln producers can offer the potters.

In spite of the fact that it takes the potters’ needs into account (flexibility, low cost, low levels of consumption, local maintenance), the local type of kiln which was presented as an “alternative solution (type 2)” that was preferred by the CIDE consulting firm was not chosen in the end, since it did not fulfil the standards imposed by APP, namely international standards.

The very traditional environment of the Medina meant that it took longer for the project target group to really feel a sense of ownership for the project.

*In the end, the kilns were mainly bought by experienced potters, who already owned kilns. Most of the target population does not have access to the kilns suggested by the project. These words spoken by one of the potters confirms this observation: “**It was those who did not need kilns who ended up buying them**”.*

Recap of expected results:

The expected result was the modernization of the production tool.

This result refers to the indicators presented in the logical framework in the annex and below:

- 144 kilns received by the potters with subsidies from the project
- Adoption rate of alternative solutions to the gas kilns (alternative solutions)
- Adoption rate of gas kilns at each of the eligible sites (Saada, Mzouda, Tamesloht)
- Capacity to acquire and to use the kilns

Modalities of resource mobilization:

All managers who were interviewed felt that the financial means which were available to carry out the project were largely sufficient.

Preparatory activities for the acquisition of gas kilns:

The social and environmental impact assessment on the gas kilns

Misunderstandings of the reference terms, particularly of the parameter on field visits led to a series of delays of all deliverables of the study¹¹¹.

Study on the character of the pottery materials and of their weaknesses

The interviews with artisans and other actors from within the sector show that this intervention led to some very concrete and useful statements as to preparing the subject and using the techniques and procedures. This had a direct impact on the quality of the products.

The gas kiln demonstrations

The five kilns that were used for demonstrations were bought by the project. Two of them were set up at the IAT in Fez and three at the Targa crafts complex in Marrakech, however, there were significant delays due to the difficult negotiations with the provider and the delivery dates which were not kept¹¹².

The aim of these demonstrations was to test the firing of traditional productions with imported kilns which respect all applicable standards. Other than biscuit firing, trials with glaze conducted in a Turkish demonstration kiln (with industrial and artisanal pigments) showed that the results obtained were identical to the results obtained with wood-fired kilns¹¹³. The results of these demonstrations were mostly documented and were witnessed by 505 potters who were present.

In spite of the high level of professionalism with which these demonstrations were carried out, their effectiveness was negatively affected by one external factor. The demonstrations in fact took place with kilns from a Turkish provider, whereas the kilns that were then proposed to the artisans came from a different manufacturer. Despite the fact that this change in manufacturer would have no technical implications, this change was used as an excuse by some potters and companies who had other reasons to hesitate, be they economic, cultural or related to competition.

The focus group on this topic which was held in Fez shows us that the potters had a lot of interest in these demonstrations: “demystifying the production tool: new knowledge on gas kilns (Turkish, Spanish etc.)” or even “we were exorcized [...] the barrier broke down [...] it was like approaching a monster and then discovering that it doesn’t bite!”. This was expressed in reference to what the great potters (the senior ones) had told them about kilns (“something frightening”). These comments prove the important role that senior artisans play, particularly

¹¹¹ Source: Diagnosis of the implementing operation of the MCA-Morocco program March 2010, page 27

¹¹² Source: Performance report

¹¹³ Source: Latest CIDE report

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in Fez, when it comes to the artisans’ lack of support for the project to replace the kilns. This point will be further developed below.

Technical assistance for the artisans in the process of acquiring gas kilns

The project’s support of the demand for financing was perceived as being valuable and indispensable by all people in charge who were interviewed. The consultant greatly supported the operation, for instance by putting in place a trade register for the 14 potential buyers in Mzouda.

The following table gives a breakdown of the number of beneficiaries of the preparation activities for buying gas kilns.

Number of beneficiaries	Fez	Marrakech	Total
Demonstrations with gas kilns belonging to the project	263	478	741
Training of the artisans in using the kilns (alternative solutions)	104	142	246
Training for the builders	6	6	12
Training for the artisans on security measures (measures to reduce the negative impact of the gas kilns)			246 ¹¹⁴

Table.15: Number of beneficiaries of the preparation activities for buying kilns¹¹⁵

Acquisition of eight kilns with the help of the project:

The Compact sets the objective of 144 kilns being acquired by the artisans with the help of the project. The co-financing agreement between APP and the Environment Fund affected 103 potters. This led to¹¹⁶:

- 8 kilns delivered; seven in Fez and one in Marrakech
- 12 orders which should have come into effect by mid-July: 10 financed through a bank loan (eight in Fez and two in Marrakech) et two self-financed (in Marrakech)

¹¹⁴ A distinction between Fez and Marrakech is not available to date

¹¹⁵ Source: Performance report, PMU report April 2013 and interview with the person in charge of PMU

Production

¹¹⁶ Source: Interviews with the people in charge of the PMUs in Fez and Marrakech on 26 July 2013

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The following table shows the number of beneficiaries of the gas kiln acquisition phase¹¹⁷.

Number of beneficiaries	Fez	Marrakech	Total
Demonstrations on the gas kiln project	263	478	741
Delivered kilns	6 ¹¹⁸	2	8
Financing requests accepted by APP	25	78	103
Requests for bank loans	8	14	22
Bank loans accepted	6	11	17
Self-financing by the artisan	8	0	8
Kilns ordered (July 2013)	8	4	12

Table 16: Number of beneficiaries of the gas kiln acquisition phase

The following table shows the zones which were eligible or not for introducing gas kilns according to the conditions set by the project.

Site	Non-eligible zones	Eligible zones	Number of kilns acquired	Absorption rate for gas kilns at each eligible site
Fez	Benjellik, Dar Mkhoukh Sahrij Gnawa Dar Benâmar Louajriine	Aïn Nokbi	6	4%
Marrakech	Amizmiz Ourika	Saada Mzouda Tamesloht	0 1 1	 0.75% 0.75%
Total number of kilns acquired with the help of the project to date			8	5.5%
Total number of kilns planned by the project			144	100 %

Table 17: Number of kilns acquired by eligible zone

To date, the rate of kilns acquired in relation to the initial objective is 5.5%.

¹¹⁷ Source: Performance report, PMU report (April 2011), interview with the person in charge of PMU Production and final interview with the people in charge of the PMUs in Fez and Marrakech on 26 July 2013

¹¹⁸ One of them currently being set up and one of them still being delivered (source: person in charge at PMU in Fez)

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Recap of the financing modalities for the gas kilns

Support for the acquisition of the gas kilns was provided in form of a 40% financing by APP, an additional 40% financing by the National Environment Fund from the Ministry of Energy, Mining, Water and the Environment, through the beneficiary potters association and the MCA account. In the end, this meant that the potters benefitted from a financing of 80% of the total cost and a VAT exemption. The cost of a kiln three cubic meters in size is 300 000 Dirhams, which means that the remaining cost for the artisans was 72 000 Dirhams.

The following table shows the financing shares of the various actors for a kiln costing 300 000 Dirhams.

Buying cost of the kiln (MAD)	APP share (40%) (MAD)	FNE share (40%) (MAD)	Artisan share (20%) (MAD)	VAT¹¹⁹ (MAD)	Cost for the artisan, including taxes (MAD)
300 000	120 000	120 000	60 000	36 000	72 000

Table 18: Buying cost for a 300 000 Dirham kiln

Including VAT, the potters’ share represents 32% of the total cost of the kiln.

Failure of the mitigation measures

In order to counter the effects of artisans not supporting the project, mitigation measures were put in place in order to involve the artisans in the process of acquiring the gas kilns through the creation of gas kiln beneficiary associations and in order to simplify the financing modalities by putting in place financing procedure which were finalized in April 2012¹²⁰. Furthermore, the Crafts Ministry intervened, to no avail, to try and persuade the directors of the national banks to consider a possible exemption to the rule which requires artisans to be registered in the trade registrar before they can get a loan.

The survey shows that only 20% of the artisans who introduced a request for financing for the acquisition of a gas kiln rate the process of replacing their kilns positively¹²¹.

Only 17% of the artisans who introduced a request for funding to buy a gas kiln are satisfied with the quality of the financial support procedure which they received in connection with their funding request¹²².

¹¹⁹ 20% VAT were applicable only on the share borne by the artisan and the environment forum

¹²⁰ A framework convention was signed on 20 September 2011 and a specific convention between the stakeholders was signed on 20 April 2012

¹²¹ See: table 20 in the production survey, annex 6

¹²² See: table 17 in the production survey, annex 6

Alternative solutions, training sessions for the builders and artisans:

The main objective of mission 6 is to present those potters who are reluctant to buy a gas kiln with a number of options which are less polluting, easy to use and economically viable.

It concerns two types of workshops:

- Workshops on pottery products with low added value, such as the zellijs of Fez, the bricks of Saada or the earthenware vases of Tamesloht
- Workshops where the artisans are not eligible for acquiring gas kilns such as in Amizmiz, Ourika or other sites

The following table shows the advantages and disadvantages of different solutions proposed by the consulting firm.

Solution	Fuel	Type of kiln	Suggestion	Disadvantage	Advantage	Cost ¹²³
Solution 1	Biomass	Improved traditional	For zones not eligible for gas kilns (Amez Miz, Ourika)	40% reduction of negative effects compared to traditional kilns		2
Solution 2 (type 2)	Gas (propane or butane)	Metal frame	For zones eligible for gas kilns (Saada, Tamesloht, Fez)	Requires a certification	Positive impacts	4
Solution 2 semi-traditional		Brick construction			Adapted to the financing capacity of many artisans	3

Table 19: Advantages and disadvantages of various kiln solutions

Alternative solution proposed by the consulting firm

The alternative solution suggested by the consulting firm was called solution 2 (type 2) and consists of a metal kiln with atmospheric burners which is most wide-spread and accepted among the artisans. This kiln represents 95% of the number of operational gas kilns in those sites targeted by the project. Currently, the artisans successfully use these kilns for all products, from small pottery objects to large vases and also for bricks and tiles (zellij) in Fez (in Marrakech/Saada and in Fez/Ain Nokbi). The reasons for the success of this type of kiln are mainly its easy use and its moderate cost.

However, the potters themselves are aware that these local gas kilns are not as safe as the imported kilns and that after a few years the insulation has to be replaced. The quality of the used materials is often the reason.

A speculation: in the case where the local manufacturers would have been encouraged to upgrade on the basis of the alternative solution (type 2), this kiln costing 160 000 Dirhams would have cost the potters 32 000 Dirhams (with an 80% subsidy), making the cost equivalent to that of a traditional kiln.

¹²³ Scale of 1 to 4: 1 represents the cheapest and 4 represents the most expensive

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Of course it takes a long time to put such actions in place, but they do correspond more closely to the potters’ demands, which would mean a greater sense of ownership by the beneficiaries and the certainty that the number of traditional wood-fired kilns would be reduced.

Training the local kiln manufacturers

The study also produced a booklet with technical recommendations which was the basis for a 6 module training course for the 11 kiln manufacturers spread out over several days. Although it was largely insufficient in terms of time, this training course did allow essential knowledge to be passed on to a heterogeneous public.

Lack of substantial support for the local kiln manufacturers

The lack of structure among the gas kiln manufacturers, the small activity volume they each have, their non-conformity with international standards and their clear unwillingness to become a part of the formal economy were seemingly the reasons why the project did not favor substantial support for the local kiln producers in its initial design.

Differences between the planned cost and the actual cost:

In spite of various requests made to APP, we have not received a budget for this subactivity.

Reasons for the observed divergences:

Late implementation

A large debate on the acquisition modalities led to the first kiln acquisitions being delayed. After the kiln demonstrations, the candidates for acquiring kilns were heavily involved in the buying process. However, all interviewed actors agreed that the implementation time frame was insufficient. The traditional environment of the Medina meant that it took longer for the project target population to develop a sense of ownership of the project.

The potters’ reluctance to buy gas kilns

The project was confronted with various reasons why the SMEs and independent artisans were reluctant.

The independent artisans’ reluctance to contractually engage with banks

The potters are used to verbal contracts regulating payment modalities which are adaptable depending on their sales or weather conditions. They were then confronted with the banks’ requirements (solvency, the need to feature in the trade registrar) and with all the anxieties that this caused them (intransigence on late payments, the need to pay taxes, etc.). It should be noted that the potters’ share of the financing (20% of the total buying cost) had to be done through the banks, since their rates were much lower than those proposed by micro-credit organizations. Their rates may be tolerable for short loan periods, but their rates are much too

high for production investment such as kilns, where the payments are spread over several years.

The potters also argue that at the beginning of the project, the banks suggested that the guarantees would only affect the kiln itself, whereas later on the guarantee was to affect the business space and the rate was considered to be too high: “the interest rate of 6% suggested by the banks is too much”¹²⁴.

This reluctance which could be felt during the individual interviews are confirmed by the results of the focus groups which were carried out in Marrakech: “long and complicated paperwork in order to obtain bank loans”.

“Those who have the financial means have already benefited from a kiln without having to go through the banks, whereas we, the less well-off, are still waiting [...] primarily it’s those people who have enough financial means that are benefitting from the project, just like in the Arboriculture fruit-tree project that mainly benefitted the big farmers who have large tracts of agricultural land”.

The interviews carried out showed that this financial reluctance was greater in Marrakech than it was in Fez, where the number of kilns that were sold was greater (6 kilns bought in Fez and 2 in Marrakech).

Buying costs were too high in spite of the subsidies

Below we present a comparison of the average costs for the different kilns¹²⁵:

Type of kiln	Local 4 m ³ gas kiln made from bricks	Metal 4 m ³ gas kiln	Share of the potters to buy an imported kiln	Turkish 2 m ³ kiln	Spanish 3 m ³ kiln
Average price in MAD	From 30 000 to 80 000	From 40 000 to 120 000	96 000	282 000	From 290 000 to 315 000

Table 20: Average cost of the various kilns

A comparison of the average costs of kilns shows that the cost of a metal gas kiln (without subsidies) can be lower than the share that the potters were asked to produce in order to acquire an imported kiln through the project. What’s more, the cost of a local brick gas kiln (without subsidies) is significantly lower than the potters’ share of an imported kiln bought through the projects.

The focus groups carried out in Fez and Marrakech show that the share requested from the potters (a cost of about 100 000 Dirhams) was one of the reasons that the project to replace wood-fired kilns was not supported by the artisans: “the personal contribution of 102 500

¹²⁴ Comment from the dedicated focus group in Marrakech, annex 7

¹²⁵ Source: PMU production. / operating account statements provided by APP / interview with heads of the potters’ associations who acquired kilns, beneficiaries of the MCC project

Dirhams was high¹²⁶”; “The participants did not support the acquisition of gas kilns because of the high price”¹²⁷.

Reluctance linked to uncertainties over the maintenance cost

One of the reasons the potters were reluctant to buy an imported kiln was that they were afraid of high maintenance costs should the kiln break down. With the locally produced gas kilns, they know what the potential maintenance costs are and the artisans can calculate them due to their habit of cooperating closely with the local kiln manufacturers.

Economic reluctance in Marrakech

The reluctance encountered in Marrakech is linked to economic aspects and the low financing capacity of the potters: the production of zellij, tiles and bricks represents about 90% of the independent artisans’ production. In view of their usual production, the ratio between the potters’ capacity and the running cost of the gas kilns is very low. For zellij, for instance, the traditional kilns have a capacity of 8 000 tiles, which is higher than the capacity of a 4m³ gas kiln, which is only 4 700 tiles.

Therefore, the kilns suggested by the project may have many advantages (in terms of firing quality, easy usage, safety), but this only really affected the high-end products such as cooking pottery, which only make up a small part of the potters’ overall production.

In addition to this economic reluctance, one must also take into account that the potters of Marrakech have a much lower financing capacity than those in Fez.

Cultural reluctance in Fez

This reluctance could be felt in a number of critical technical arguments put forward by the potters. For example: cutting mosaic pieces is more difficult when firing with gas kilns, a low level of traditional glaze durability when fired in gas kilns, good biscuit firing but burnt glaze during firing, or the fact that the demonstrations were carried out on Turkish kilns whereas the kilns which were ordered were actually Spanish.

In view of these objections, glaze firing without lead was a technique that was confirmed during the demonstrations and approved by the potters. Glaze trials on the Turkish demonstration kiln at IAT¹²⁸ showed identical results to those obtained with wood-fired kilns¹²⁹.

Gas kiln acceptability varied according to different production types

Three main production types were identified, for which we address the main advantages and disadvantages given by the potters when it comes to their interest in replacing traditional kilns with gas kilns:

¹²⁶ Comment from the focus group in Marrakech, annex 7

¹²⁷ Comment from the focus group in Fez, annex 7

¹²⁸ With industrial and artisanal pigments

¹²⁹ Source: final CIDE report, inspection office for gas kilns

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- Small pottery: utensils, decorative articles, ceramics and all types of pottery. The potters are in favor of acquiring the gas kilns and replacing their traditional kilns. The arguments put forward by the potters are many: easy operating, fuel savings, better product quality and the growing scarcity of biomass fuel compared to the availability of butane gas which has an affordable price due to government subsidies
- Large scale pottery products (urns and vases in Tamesloht) and bricks (Saada): the potters remain reluctant to use gas kilns. The argument put forward is linked to the cost price increase of these articles with low added value when the kilns are fuelled by gas
- The glazed zellij of Fez: the potters continue to use traditional kilns and are in favor of maintaining traditional glaze preparing and firing methods for glazed zellij which according to them are the only methods which can create the desired colors

Factors blocking the potters’ acquisition of gas kilns:

Opposition from the local kiln manufacturers

From the start of the project, the arduous requirements for responding to an international call for tender meant that the local gas kiln manufacturers were excluded from the project.

This point became clear during the focus group in Marrakech: “Moroccan enterprises cannot participate in this call for tender since they do not have the necessary means to respect the norms and standards which are required in the areas of safety, hygiene and environmental protection”. Because of their close links to the potters, these manufacturers largely contributed to discouraging the potters from buying the imported kilns. Indeed, since their relationship with the potters is based on trust, this meant that kilns were often installed without contracts and with payment modalities which accounted for weather conditions and the best sale periods for the potters.

One kiln manufacturer pulled out

One of the sticking points which enhanced the lack of artisan support for the gas kiln project was that the Turkish kiln manufacturer (who provided the demonstration gas kilns) did not respond to the call for tender to supply the 144 kilns. This meant that the Spanish manufacturer Piroval, represented by a Moroccan company based in Khemisset won the tender. The fact that the Turkish manufacturer did not respond to the second call for tender led to rumors among the potters and provided those potters who were undecided an additional excuse not to participate.

It seems that the reasons for the Turkish manufacturer pulling out was the changing of the body which launched the call for tender. Indeed, the first call for tender was launched by APP, the sole financier. During the second call for tender, APP was merely a co-financer and wanted the call for tender to be launched directly by the project beneficiary potters’ association. The Turkish manufacturer had already experienced financial set-backs when previously working with the potters’ cooperative in Fez and therefore chose not to respond to the call for tender.

Hence, the change in the type of kiln (Turkish kiln / Spanish kiln) because of a change in the body responsible for launching the call for tender provided those potters who were already skeptical with another excuse, in addition to their reluctance based on cultural or competition grounds.

SME lobbying

Some SMEs which had been active in the sector for several generations felt that the fairly simple usage and installation of the kilns would mean a rapid increase in competition and the end of their dominant position. Therefore, some influential entrepreneurs led an aggressive lobbying campaign targeting the potters, mainly based on the fact that the kilns being offered for purchase were not by the same manufacturer as the kilns used during the demonstrations and would not meet the potters’ needs or allow them to obtain the desired quality.

Involvement of the beneficiaries:

The survey shows us that only 13% of the artisans who requested financing to buy a gas kiln felt that they had been involved in the design or implementation of the project¹³⁰.

However, one can note that the potters’ associations were involved in points pertaining to or complementary with the introduction of new kilns (providing grounds to install the kilns, clay processing plants). For example, the potters’ association in Ourika¹³¹, supported by the commune, had a study conducted in which it examined the feasibility of putting in place a collective structure in order to combat the effects of its zone not being eligible for the purchase of kilns. They have asked to be given some land in order to construct a pottery complex. Another important example is that the project team, upon demands by the beneficiaries and the associations, requested MCC to finance the clay processing plants in Marrakech (Mzouda and Saada) and in Fez.

4.3.6 Impact

4.3.6.1 Training of potters

Conclusion: Impact on the social level in that the training sessions allowed for exchanges between the professionals, “to break prejudices” and to gain a more positive view of their colleagues.

At the social level:

Unexpected positive impact

A very positive impact became apparent in the focus groups: The training sessions allowed the potters to get to know each other and although they consider each other to be competition who were “previously considered to be mean and confrontational people”, these encounters allowed them to overcome preconceptions and to view their peers in a more positive light. This discriminatory attitude towards other professionals was noted by the consultant, albeit in form of anecdotes, during his interviews. These encounters therefore had a very positive effect on the level of cohesion between the artisans.

¹³⁰ See: table 16 in the production survey, annex 6

¹³¹ Villages of Tafza, Anrrar, Ouagassen

Unexpected positive impact

At the same time, the training sessions allowed the potters to get to know the associations, which in turn meant that the associations could bring in new members¹³².

Unexpected positive impact

At the same time, the survey shows that 46% of the potters felt that the project had improved the quality of their professional and family life¹³³.

4.3.6.2 Replacing traditional kilns with gas kilns

Conclusion: At the professional level, the impact is still weak since the potters are still adapting.

At the social level, the potters who were relocated to Benjellik (Fez) and having already invested in some land or in a workshop, were hit by the Wilaya’s decision to ban wood-fired kilns and they do not have the means to reinvest in a gas kiln. Their discontent is even stronger since they received no compensation, unlike their peers the coppersmiths.

At the environmental level, those who purchased an imported kiln through the project still continue to use their traditional wood-fired kilns. However, the residents who are growing ever more aware of environmental problems, are putting pressure on the potters in order to make them stop using wood-fired kilns.

At the professional level:

Unexpected negative impact

The survey shows that only three potters out of the eight who received a gas kiln feel that replacing their wood-fired kiln allowed them to improve their working conditions¹³⁴.

Only one potter out of the eight who received a gas kiln says that this kiln has allowed him to cut production time, to better control firing costs and to be less polluting¹³⁵.

Expected positive impact

However, four out of the eight potters who received a gas kiln feel that replacing their wood-fired kilns has allowed them to be less reliant on weather conditions¹³⁶.

At the social level:

Unexpected negative impact

¹³² Comments made during the focus groups, annex 7

¹³³ See: tables 61 and 62 in the production survey, annex 6

¹³⁴ See table 67 in the production survey, annex 6

¹³⁵ See table 76 in the production survey, annex 6

¹³⁶ See table 16 in the production survey, annex 6

The potters’ discontent with the decision to ban traditional kilns: in the region of Fez there was a decision by the Wilaya to ban traditional wood-fired kilns from 6 June 2012, which provoked strong discontent among the potters particularly among those who had been relocated to the area of Benjellik. In fact, they had had to invest in the purchase of land and workshops and were now faced with the obligation to invest once again, this time in the acquisition of a new gas kiln. Furthermore, unlike the coppersmiths who had received high compensations for their new business spaces, the potters received no financing for their relocation to Benjellik. This difference in treatment further increased their discontent. In Marrakech, there was less social discontent than in Fez: although the use of wood-fired kilns has been banned since a government memorandum in 2008, this ban is widely ignored.

Unexpected positive impact

Pressure by the population on the potters to change their traditional firing methods: in Ourika for instance, the locally manufactured gas kiln is preferred over the traditional kilns since those potters who fire in the forest are subject to large fines. Furthermore, the residents, who are increasingly aware of environmental issues, are opposed to this highly polluting firing method.

At the environmental level:

Unexpected negative impact

One can see a strong increase in gas kiln sales by local manufacturers¹³⁷: in Mzouda, the potters who did not buy MCC gas kilns still bought local gas kilns and installed them: “they are spreading like wildfire”. Some of them are considered dangerous, others less so. This increase has been confirmed by CIDE. In 2011, they already represented 16% of the total number of gas kilns. This growth in the number of gas kilns was especially noted in the Marrakech region¹³⁸.

Unexpected negative impact

The survey shows that six of the eight potters who received a gas kiln feel that replacing their wood-fired kilns allowed them to be less polluting¹³⁹. However, the six of the eight potters who received a gas kiln say that they have not given up their former practices of working with wood-fired kilns¹⁴⁰.

Indeed, the vast majority of those who bought imported kilns also own wood-fired kilns which they continue to use. Therefore, their purchase of the gas kilns through the project did not help reduce any negative effects on the environment.

Unexpected negative impact

It should be noted that the subsidies for butane gas granted by the public authorities is being misused: the gas kilns should in theory run on propane. However, since propane is not

¹³⁷ Interview with the heads of associations

¹³⁸ Source: Final report on the study of alternative solutions

¹³⁹ See table 68 in the production survey, annex 6

¹⁴⁰ See table 85 in the production survey, annex 6

subsidized, the beneficiaries are making some technical modifications and are using about ten canisters of butane gas which is subsidies, although it seems that the subsidy is only intended for domestic use.

4.3.7 Sustainability

4.3.7.1 Training of potters

Conclusion: Sustainability is fragile. The training sessions helped improve the cohesion between the potters and will probably have an impact on strengthening the potters’ associations. However, it will be necessary to pursue the actions which were carried out in order to support the potters in adopting and implementing the lessons learned.

These training sessions were carried out two years before this current evaluation. In order to maintain the successes achieved with the beneficiaries, the actions would have to be continued in order to support the potters in adopting and putting into practice the lessons that were learned.

The survey carried out in the framework of the current evaluation shows that 49% of the potters are not members of an association¹⁴¹, 33% of the potters who were interviewed say that they were “satisfied” or “fairly satisfied” with the services provided by the association or the group that they are a member of¹⁴².

4.3.7.2 Replacing traditional kilns with gas kilns

Conclusion: For the production of high added value products such as glazed pottery, the viability of the gas kilns which were purchased through the project did not pose any specific problems. However, other products of lower added value such as zellijs and especially tiles required greater gas consumption and the production capacity was lower than with a traditional kiln, viability was lower. This weakness was determined a long time ago by the potters and was one of the reasons why they did not support the project.

At the same time, the artisans’ low investment capacity should be taken into account. Putting in place units to mutualize means (collective kilns) seems to be the most appropriate way to enable each potter to benefit from safe and high quality firing. This would however require structured action within the sector that would have to be sustainable in the long-term.

¹⁴¹ Response “not concerned” or “not a member” to the question on their involvement in an association (See table 84 in the production survey, annex 6)

¹⁴² See table 84 in the production survey, annex 6

Viability:

The survey shows that six potters out of the eight who received a gas kiln do not foresee any future problems related to the use of the gas kilns¹⁴³. However, six potters out of the eight who received a gas kiln feel that the running costs for the gas kilns cannot, or can only barely be carried¹⁴⁴.

During the focus group in Fez, those who had acquired gas kilns¹⁴⁵ and who had already used gas kilns in Fez (2 out of 6) insisted that there were technical difficulties involved in getting the kiln up and running. They mentioned the loss of two batches of zellij, valued at 12 000 Dirhams. The first artisan to purchase a kiln in Marrakech also reported that he had lost a batch, although this was due to an adjustment error. It is interesting to note that in spite of the loss of this batch, the artisan in Marrakech gave a very positive account of his experience with the new kiln.

The potters who purchased kilns in Fez and who were interviewed during the focus group name one advantage, which is the quality. They highlight disadvantages which are questionable (the length of firing, the maintenance which requires an additional employee, large electricity consumption due to ventilation).

In truth, only two disadvantages can be taken into account, namely the high consumption of gas and a lower production capacity compared to traditional kilns (3 500 tiles instead of 8 000), which are however counterbalanced by a vastly superior firing quality.

Update of a trading account by firing, three types of kilns

This analysis refers to the table presented in annex 9

The analysis of the margin for the three types of kilns, regarding the three main types of production (zellij - bricks and tiles - glazed pottery), it appears that for production of zellij, bricks and tiles, imported gas kiln is not profitable with negative margins of Dirham -135 for the productions of zellij and -1363 Dirhams for the production of bricks and tiles (by firing).

On the other hand, this analysis reveals that for the production of glazed pottery, imported gas kiln offers a positive margin of 5993 Dirhams (by firing) largely higher than the margins with the local kilns (margin of 2625 Dirhams) and traditional kilns (margin of 185 Dirhams).

The following table presents the main advantages and disadvantages of the three main kiln types:

¹⁴³ See table 80 in the production survey, annex 6

¹⁴⁴ See table 82 in the production survey, annex 6

¹⁴⁵ See dedicated focus group in Fez, annex 7

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	Traditional wood-burning kilns	Locally produced gas kilns	Imported gas kilns
Advantages	Minimal purchasing cost Large capacity	Cheap to buy Locally conducted maintenance Low consumption of gas	Easy to use (absence de surveillance) Safe Very homogeneous firing for controlled quality
Disadvantages	Very heterogeneous firing and quality A lot of workers needed to conduct a firing Highly polluting	Firing can only be managed approximately (no programming) and the quality is average Dangerous: no safety device	Expensive to buy Unclear maintenance costs Higher gas consumption

Table 21: Comparison of main kilns

The following presents a comparison between the two types of gas, butane and propane:

	Butane	Propane
Advantages	Not very expensive (subsidized)	Easy to use (not many workers needed to manage the firing) Ability to obtain high temperatures in order to create colors (such as tomato red) that cannot be obtained using butane
Disadvantages	A lot of workers needed to manage the heat of the gas and the canisters Requires continuous surveillance	Expensive to use Severe danger of explosion if not installed in a standardized way

Table 22: Comparison between the two types of gas

Alternative:

Bearing in mind the low levels of investment capacity the artisans have, putting in place units to mutualize means (collective kilns) seems to be the most appropriate way to enable each potter to benefit from safe and high quality firing. This would however require structured action within the sector that would have to be sustainable in the long-term.

4.3.8 Gender

4.3.8.1 Training of potters

The proportion of women in the pottery sector is very low. However, the project did offer specific training sessions for those few women who do work in pottery workshops.

The pottery sector is a predominantly male workplace. However, in certain areas such as in Saada, women are in charge of decorative tasks. Since they were reluctant to take part in the program, training sessions dedicated specifically to women were organized for each of the 5 modules. Proportionately, the women’s access to training was equivalent to that among the men: out of the 35 women identified, 26 benefitted from the training session in Saada¹⁴⁶.

¹⁴⁶ Source: End of mission report on the subactivity training the potters

Chapter 5: Recommendations

This chapter gives useful recommendations, on the one hand in order to maintain the results which were achieved and on the other hand in order to improve the design and the implementation for similar future projects.

5.1 Promotion support

5.1.1 Promotion campaigns

Improving the design and implementation of similar projects:

Number	Recommendation	Reference
R.01	<p><u>Coordinate the upgrading and promotion activities:</u></p> <p>In order to reduce the negative impact of the “lack of activities designed to help the beneficiaries prepare”, it would be a good idea to not divide the promotion activities from the upgrading of the companies’ capacities.</p> <p>In an ideal scheme, two years of preparation are needed in order to get a company (SME, artisan, cooperative) to a level where they have a product range that is truly adapted to the target markets in terms of design, price and specific promotion tools.</p>	Coherence
R.02	<p><u>Involve the artisans financially:</u></p> <p>Give more responsibility to the artisans when they participate in international actions, meaning they pay a contribution, no matter how small.</p> <p>When asked: “Would you have taken part if you had not received a subsidy?”, the artisans who were interviewed all responded positively without hesitation.</p>	Impact

5.1.2 The national label

Maintaining the results which were achieved:

Number	Recommendation	Reference
R.03	<p><u>When auditing, priority should be given to the 300 units already certified as collective brands</u> by the craft ministry’s DQRD, where the attribution criteria are coherent with the national label criteria.</p> <p>The aim is to give significant visibility to the label in order to create a virtuous circle and to increase demand from the Moroccan companies and the buyers.</p>	Sustainability

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R.04	<p><u>Orient the collective brands towards expanding markets</u> such as construction and decorating where specific Moroccan products such as zellij, stucco, metalwork and lighting can be found.</p> <p>Indeed, apart from in pottery the <u>collective brands</u> are targeted at niche markets with weak potential.</p>	Sustainability
R.05	<p><u>Change the promotion campaign which is planned for after the project:</u></p> <p>The project’s activities led to the elaboration of a communication plan which is planned to be carried out after the project.</p> <p>A too-hasty presentation of the label before its application has become effective will only have a negative effect on the label’s credibility. Let us bear in mind that only 30 companies will be labeled by the end of the project.</p>	Efficiency

5.1.3 The tourist circuits

Maintaining the results which were achieved:

Number	Recommendation	Reference
R.06	<p><u>Ensure that cooperation is taking place between all competencies within the sectoral entities:</u></p> <p>It will require an inter-ministerial political will in order to achieve the involvement of various actors from the tourism, crafts and heritage sectors from the start of the project.</p>	Coherence
R.07	<p><u>Conduct regular promotion and information campaigns:</u></p> <p>On the one hand targeting national tourists and on the other hand targeting international tourists through intermediaries (tour operators, travel agencies, hotels, tourist information centers etc.).</p> <p>This could lead to demonstrations and occasional topical presentations for a specific industry when tourists come through the circuits and the visitor tours.</p>	Efficiency
R.08	<p><u>Ensure dialogue between the signatories of the « tourist circuit» convention signed between the local authorities and the sectoral operators:</u></p> <p>The regular financiers of these organizations should be invited to participate in this dialogue (Wilaya and National Office of the Ministry of Tourism - ONMT). The goal of this dialogue is to create a financial calendar detailing the commitments entered into by each party upon signing the two conventions.</p>	Sustainability

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Improving the design and implementation of similar projects:

Number	Recommendation	Reference
R.09	<p><u>Preserve what makes the Fez Medina special, namely the fact that it is an artisan city and not a souk:</u></p> <p>These proposals take account of an inherent risk of this project which aims at relocating artisans and/or reallocate them business spaces in commercial or tourist zones.</p> <p>Very close attention should be paid to make sure that the spaces in the fondouks are given to artisans – and not to shop owners – and that they are turned into workshops.</p> <p>Protect what already exists by adding value to the artisan quarters and spaces by, for instance, renovating the facades and turning them into workshops.</p> <p>Limit the number of modern artisan workshops which are taking up more and more space in the Medina.</p> <p>Ensure that endangered professions are kept alive, for instance by maintaining the expertise of the one remaining manufacturer of brocade (woven silk, gold or silver thread) in Fez (Mr Ouazzani) by enabling these artisans to improve their working conditions and to train more apprentices.</p>	Coherence

5.2 Production Support

5.2.1 Training of potters

Maintaining the results which were achieved:

Number	Recommendation	Reference
R.10	<p><u>Supporting the potters in adopting and implementing the practices and lessons they learned:</u></p> <p>Above all, this support needs to be pragmatic and could take the form of bimonthly support by a professional potter to the artisans to help them achieve the desired change.</p> <p>This support could also have the task of enhancing exchange and practices, especially on the professional aspects of “technique and safety, environment” but also on the aspects of “commercialization and management”.</p>	Sustainability

Improving the design and implementation of similar projects:

Number	Recommendation	Reference
R.11	<p><u>Dedicate half of the training budget to individual support</u> in order to make the lessons learned tangible and in order to apply them in a concrete and targeted fashion to the needs of each business.</p>	Effectiveness
R.12	<p><u>Include local stakeholders in the project design:</u></p> <p>Although this example is an anecdote, the fact that a budget of 150 Dirhams for all participants was planned for the catering of the training sessions shows that often the beneficiaries’ realities were not taken into account.</p>	Efficiency
R.13	<p><u>As far as the training volumes allow it, priority should be given to those groups targeting illiterate people,</u> specifically the training modules on management or marketing.</p>	Efficiency
R.14	<p><u>Ensure that the lessons given to the beneficiaries contain as little theory as possible and can be put into practice almost automatically:</u></p> <p>Priority should be given to those training sessions which touch upon the core of the professions, such as courses on the selection of raw materials or on simple techniques.</p> <p>Ensure that the artisans (individually or collectively) have access to the tools and materials which they trained with.</p>	Efficiency
R.15	<p><u>Take the periods of low activity in the potters’ schedule into account:</u></p> <p>Training sessions should be organized between October and February or continuous training should be carried out on one or</p>	Relevance

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	two half days per week (rather than long training sessions lasting three days).	
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5.2.2 Replacing traditional kilns with gas kilns

Maintaining the results which were achieved:

Number	Recommendation	Reference
R.16	<p><u>Implement support for the structure of the sector:</u> the aim being to put in place units for the collectivization of means, specifically so that each member can have access to collective kilns.</p> <p>This collective production space could also include a clay processing plant for the potters’ use.</p>	Sustainability
R.17	<p>In terms of results, efforts still need to be made with the Ain Nokbi site in order to support the artisans, since the spaces are built but <u>the artisans still need a structured HQSE procedure and a sustainable basis for the following points:</u></p> <p>Have a policy, preferably in writing, on QHSE</p> <p>Conduct an environmental analysis depending on the activities of each artisan and put in place a program for the environment and health and safety at work as well as objectives</p> <p>Plan for oversight in the area of the environment and health and safety at work</p> <p>In order to ensure sustainability of the E&SS (environment, health and safety) process, define a clear organization together with the artisans and define who should be in charge and who should have authority</p> <p>Plan a continued training program</p> <p>Carry out independent audits conducted by accredited organizations.</p>	Recommendations from the environmental expert report

Improving the design and implementation of similar projects:

Number	Recommendation	Reference
R.18	<p><u>Make sure the project is long-lasting</u></p> <p>As is, only two years of operations seems largely insufficient to persuade a population that is not inclined towards change to sign up to investment logics which they are not familiar with.</p>	Efficiency
R.19	<p><u>Introduce the technical changes progressively:</u></p> <p>It would have been wise to first of all suggest solutions that intervene upstream in the production chain, for instance in</p>	Efficiency

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	machines for processing clay, and then to look at alternatives further on in the production chain (press, induction molding) before suggestion alternative firing methods to replace the traditional methods.	
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Chapter 6: Conclusion - summary

6.1 Aspects the two activities have in common

Design

Delays during the activity preparation phase reduced the time that was spent on carrying out the activities. These delays were mainly caused by drafting the ToR which were deemed to not be conforming, or delays caused by the validation of the “Study on promotional needs”.

Relevance

Although the strong focus on tourism does not stand to question, there is the risk of tourist demand decreasing, whereas the internal market was not given enough importance, although it is one of the companies’ main markets.

Efficiency

The time it took the administration to conduct validations was deemed to be too long and not very compatible with the approach of the project management which is based on objectives and precise activities. Furthermore their role was thought to be insignificant by the stakeholders.

Impact

The methods which the project imposed led to a real learning experience among the PMU teams and had a real impact on the relationship between the administration and the female members of the crafts sector.

6.2 Promotion support

Overall, the relevance of the “Promotion support” activity is considered to be high

The promotion campaigns match up with two main expectation expressed by the beneficiaries, namely to gain access to new markets locally and to new export markets. The national label responds to the difficulties that handicrafts companies have to individually put in place tools to protect their intellectual property. The tourist circuits on the other hand have a medium relevance since, although they may respond to the tourists’ and beneficiaries’ expectations, it is important to take into account that agreements between the main bazar salesmen and the tour operators which divert significant tourist flows makes it difficult for the artisans to enter into direct contact with large numbers of tourists.

Coherence of the “Promotion support” activity is mixed

The promotion campaigns are not very coherent since there is a divergence between the means available and the number of markets targeted and there were not enough means allocated to preparing the companies. The national label on the other hand has strong coherence. Indeed, the design and implementation of the national label is the result of a

national strategy pushed forward by the Ministry together with the collective brands already in place for about twelve product families. As for the tourist circuits, they are strongly coherent with the Fez-Medina project, especially because of the future restoration of the fondouks in Fez.

Effectiveness of the “Promotion support” activity is fairly weak

The promotion campaigns had a fairly mediocre effectiveness with an average increase in income of only 27% and less requests for samples and orders on the export market than on the local market. Nevertheless, the number of jobs created was satisfactory. For the national label it is therefore not yet possible to say whether it was effective or not since at the time of writing none of the companies had been labeled. The effectiveness of the tourist circuits is low since only 16% of beneficiaries report that their sales have increased by 10% or more. However, in view of season (a bad tourist season following Ramadan) during which the circuits were put in place, the effectiveness in Marrakech is still low. The average increase in the sale of handicrafts products is only 23% in Marrakech, whereas in Fez the sale of handicrafts products has more than doubled.

Efficiency of the “Promotion support” activity is mixed

The kick-off of the promotion campaigns suffered from the delay in the validation of the “Study on promotional needs”, the varying readings of the ToR and a call for the expression of interest which was hardly adapted to the handicrafts sector. One can generally note that the beneficiaries appreciated the international fairs and the visits from buyers. Feedback on the marketing missions is less positive. On the other hand, the efficiency of the national campaigns is lower, specifically due to the exhibition dates which were not appropriate and due to a lack of communication, specifically with the hotel owners. In the end, 40% of participants feel that they acquired new skills. It should be noted that the fact that it was free of charge, or almost, is hardly adapted to the aim of increasing the companies’ capacity to develop a market approach. The work carried out in order to create the national label is undeniably of high quality, be it the definition of selection criteria, the labeling process or the governance mode which is perfectly applicable. However, the efficiency of the pilot phase (supporting the companies in their eligibility request) is low, since the delays in the project did not allow for the process to be completed. The same goes for the communication activities related to the label, the quality of which cannot be judged and the realization of which was considered to be too hasty with regard to the fact that the label remains inoperative to date. Although the institutional stakeholders and other actors in charge of the sector were involved, it is regrettable that there was not more cooperation with the Ministry which will be in charge of managing the label at the end of the compact. The tourist circuits were implemented in line with all specifications in spite of the very short execution deadlines. However, a stronger institutional dialogue between the three sectors affected (tourism, crafts, heritage) would have made the implementation easier. It is important to note the ambiguity pointed out by several beneficiaries, namely that the orientation signs can be understood as simple directional signs.

Promising impact of the “Promotion support” activity

The promotion campaigns had a very encouraging impact at the professional level with the artisans, who became more confident in negotiating, more aware of the need to modify their

product range and who started to realize what investments are necessary in order to reach new markets. At the social level, the positive feedback given by the beneficiaries related to their development of skills such as establishing relationships, being more open towards others, communication, etc. The national label is clearly defined but currently the actions are too recent to establish any kind of impact. The tourist circuits helped the diversification and distinctiveness of the handicrafts range in the Medinas of Fez and Marrakech. They can be clearly identified by the majority of tourists and travel agencies are showing a strong interest in developing the theme of “handicrafts”.

Sustainability of the “Promotion support” activity is uneven

For the promotion campaigns, the frequent participation of a number of artisans in regular activities carried out by the Artisan House (*Maison de l'Artisan*, a Moroccan institutional body tasked with promoting the handicrafts sector) aims at rendering the actions carried out by MCC sustainable. The national label seems to be sustainable. Indeed, it is planned that the Craft Ministry's DQRD be in charge of managing the label. This unit's experience acquired in the implementation of standards and specifically certificates, compulsory standards and the collective certification brands guarantees that it will be able to manage the label. However, the sustainability depends on the auditing of 300 units that are already certified as “collective brands” so that the label can gain significant visibility. For the tourist circuits, it has not yet been planned how to render the actions carried out by MCC sustainable. The printed maps are important to ensure that the tourists can easily grasp the geography of the Medina and to date it is not guaranteed that these maps will be republished, since the partners have not yet agreed on the necessary budget lines.

Gender

The participation rate of women is around 25% but it is probably higher since women are very present all along the production chain.

6.3 Production support

The level of relevance of the “Production support” activity is considered to be high

There is a proven relevance to the training of potters since it corresponds perfectly to the potters' main expectations. However, when organizing the training sessions the project favored a certain productivity and the sessions were spread out over a period of time that was deemed too short with training module lengths which were too long to keep the artisans' attention. There is a proven relevance to replacing traditional kilns with gas kilns since it corresponds to future needs within the pottery profession which, in a very near future, will have to respect environmental standards and will have to propose new products which will require, certainly for value added products such as pottery, quality management which will have to be linked to the possibilities offered by gas kilns.

Fairly low level of coherence for the “Production support activity”

Although the training of potters is completely coherent with national policies, coherence between the project design and the specific objectives is lower since the training objectives were too ambitious compared to the artisans' capacity to take in the planned lessons. This

meant that some of the implementing parties had to strongly reduce the level of their classes. Replacing traditional kilns with gas kilns shows a medium level of coherence. It is perfectly in line with national environmental policies and is in line with the support logic for the Moroccan production sector. However, the project design did not take into account the potential of the local gas kiln manufacturers and favored imported kilns from the start. Several experiences were gained prior to the project which could have been a good basis for developing a local kiln based on local usage and perfectly adapted to the needs and capacities of Moroccan potters.

A low level of effectiveness for the "Production Support" activity

There was a low level of effectiveness for the training of potters. Indeed, we noted an increase in revenues of less than 10% for three-quarters of the trained potters. This point is confirmed by the low sales growth. If the investigation reveals a rate of adoption of the practices recommended by the project greater than 50%, these figures do not correspond to the reality witnessed during visits to the workshops in which very few examples of practices recommended by the project were actually observed. The advantage of implementing these new practices was understood by artisans, but the transition to practice suffered from lack of support. To date, the effectiveness of replacing traditional kilns with gas kilns is almost zero. With 6 kilns in the adjustment period and only 2 in production, no potters who received a gas kiln indicates an increase in profits or sales of the business resulting from the new kilns. On the other hand, the interview with the only potter who started production shows that he had no broken pottery in his first production batch. It is therefore highly likely that the goal of having less than 5% of broken pottery will be achieved. Meanwhile, the vast majority of buyers of imported gas kilns also have wood kilns they continue to operate. Acquisition of gas kilns with the project did not therefore help with the reduction of environmental damage.

A mixed level of efficiency for the "Production Support" activity

The efficiency of the training of potters is good. However, even though the potters unanimously praised the way the training was conducted, the sessions were still considered too theoretical. The heterogeneity of the participants, including occasionally those who were illiterate, has sometimes been considered a hindrance. The participation of some artisans at multiple sessions of the same module tells us about their difficulty in assimilating the lessons learned, but also their strong interest in these teachings. The level of efficiency of the replacing traditional kilns with gas kilns is very low. With an initial target of 144 kilns to be acquired by artisans with the help of the project, only 8 have been delivered to date, which is 5% of the initial target. An order of 12 kilns is in process. Even though demonstrations of gas kilns have enabled us to prove to the potters that imported kilns would allow them to achieve the same results as wood stoves, the acquisition of gas ovens with the help of the project has still faced several difficulties, such the reluctance of artisans to join the formal sector and to work with the banks, the decision to launch the call for proposals for gas kilns by the "project beneficiary associations", and especially cultural resistance exacerbated by lobbying by the market-leading companies who feared competition, mainly in Fez. In addition, non-adherence by the artisans to the project was motivated by the poor adaptation of the imported kilns to the production needs of the majority of potters and by the buying terms proposed by the banks in regards to the offers by local kiln makers. Meanwhile, the very traditional environment of the Medina required longer periods to allow those who were the targets of project to adopt the project. In the end, the kilns were largely bought by the senior potters who were already well-

equipped, and the great majority of the target population did not have access to the kilns proposed by the project. To quote the words of one potter, “The kilns were bought by those that didn’t need them.”

Mixed impacts for the “Production support” activity

For the training of potters there were some positive impacts, notably from the social plan of the training that permitted exchanges between professionals, to “break negative preconceptions” and thus to have a more positive outlook on their colleagues. Thus they helped to participate in the improving of social cohesion among the potters and to likely permit the reinforcement of potters’ associations. The impact on a professional level of the replacing traditional kilns with gas kilns is still weak as the potters are still in an adaptation period. On the social level, the potters moved to Benjellik (Fez) who had already invested in grounds and a workshop were hit by the Wilaya’s decree forbidding wood-burning kilns, as they no longer had the means to re-invest on gas kilns. Their dissatisfaction was even greater still as they were not compensated as were their colleagues the coppersmiths.

The sustainability of the “Production support” activity requires an extension and re-framing of actions

The sustainability of the training of potters is judged to be fragile. It will be necessary to continue the efforts to support the potters in the adoption and implementation of lessons learned. The sustainability of the replacing of traditional kilns with gas kilns- taking into account the reservations and blocking factors and above all the poor capabilities to invest among the artisans, the implementation of units that pooled resources (collectively-used kilns) seems to be the strategy best suited to offer each potter the ability to benefit from safe, high-quality firing. However, this will require preliminary action to be taken in order to change the structure of the sector in the long-term. For products with high added value such as glazed pottery, the viability of the purchased gas kilns does not pose any particular problems. However for the other products of lesser added value such as zellij and especially tiles, the gas consumption is higher and the production capacity is weaker than the traditional kiln: the sustainability is less. This weakness has long since been identified by the potters and was one of the elements of their non-adherence to the project.

Gender

The proportion of women in the pottery sector is very small. However, the project offered the few women working in the pottery workshops specialized training that was able to focus on their specialties.

Annexes

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Annex 1: Persons Interviewed

Institutional			
Name	Institution	Position	Contact
- Mouhcine Daoudi	APP	Evaluation Coordinator	0537273753 0660120667 daoudi@app.ma
Abdelkader Amrani Manssouri Idrissi	APP	AFM Director	0660120658 amrani@app.ma
Mounir Alami	APP	AFM Project Coordinator	0660120664 elalami@app.ma
Saadia Bouziar	Ministry of Tourism	Chief of Service	0661821301 sbouziar@tourisme.gov.ma
H'Sain Abderrahim	Ministry of Handicrafts	Executive Manager of AFM 4 Handicrafts Project	0660147502
Narjessa Almalki	Ministry of Handicrafts	Evaluation Chief, Handicrafts Project	0674908733 narmlk@live.fr
Souad El Fertah	Ministry of Handicrafts	Production Chief	0674908734 souadelfertah@gmail.com
Mehdi Iben Attya	Ministry of Handicrafts	Official in charge of Label Promotion activity	- 0674908731
Brahim Ouamane	Ministry of Handicrafts	Manager AFM 6 Handicrafts Project	0660147503
Abderrahim Iben Khayat	PMU Fez	Person in charge	0660147504 abderrahim@belkhatat@gmail.com
Mustapha Ouali	PMU Marrakech	Person in charge	0674908730 mustouali@gmail.com
Khalid Rahel	Ministry of Handicrafts	Chief DQRD	0661059948
Alessandra Frontoni	EU Delegation in Morocco	Handicrafts Sector	0537597800
Muneera Salem Murdock	MCC / Morocco	Director	0537633783 salemmurdockm@mcc.gov

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Service Providers			
Name	Agency/Position	Project	Contact
M. Chehbouni	CIDE	AFM1	0668168189
M. Mandri	CIDE	In charge of assistance to potters, AFM 1	0663629665
Olivier Messmer	Solimar International		06.99.68.63.22 o.messmer@solimarinternational.com
José Gancalves	CARANA Corporation	AFM4	0670904538 05376704
Elaine Bellezza	CARANA Corporation / Assistant Director	AFM4	0620043742
Amil Ahlafi	2dDAMA (SBA)	AFM5	0537770534 0663723728
Henry Vergnes	Solimar / Aid to artisans	In charge of tourism circuits AFM6 (CT)	
Reda Kadmiri	Solimar / Aid to artisans	Marketing and promotion AFM6	0610553549
Shawndra Herry	Solimar / Program Director		0628545531
Hicham Elmadi		Trainer in design in Marrakech	0661159380

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Stakeholders			
Name	Agency	Position	Contact
Naji Fakhkthari	Fez Chamber of Handicrafts	President	0661158803 caf_fes@hotmail.com
M. Tahri	Fez Chamber of Handicrafts	General Director	0661051766 chaoukitahri@hotmail.fr
Haddadi Abdessamad	IAT of Fez		0666834452
Diamane Mohammed	Marrakech Chamber of Handicrafts	General Director	0524426204
Sairi Mohamed	<i>Fédération des Entreprises de l'Artisanat</i>	Vice-President	0604730550
M. Kraffssi	<i>Fédération des Entreprises de l'Artisanat</i>	President	0661132389
Aziz Lebbar	CRT Fez	President	0535942492 0661378428
M. Bentbib	CRT Marrakech	General Director	0661410968
Mounir El Merchichi	CFQMAM Marrakech		0674781303
Youssef Herkouch	IAT Fez	Director	06 64 36 69 49 y.herkouch@hotmail.fr
Abdelkrim El Khati	Marrakech City Council	Director of Economic Pole	0661581214
M. Abentbib	CRT Marrakech	General Director	abentbib@gmail.com

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Beneficiaries			
Name	Position/Activity	Location	Contact
Echchouqui Hajiba	Embroidery artisan for handicrafts group	Marrakech	0661534348
M'y Hafid Koumina	Artisan, Weavers' Cooperative - Ennahda	Marrakech	0642120700
Abdellah Boukil	Artisan - Galerie 132' Sablisime	Marrakech	0661203229
Hind Boukil	SME	Marrakech	0661399718
M. Bensaleh	Bahjà export	Marrakech	0661161439
M. Kharbib	President of Fondouk associations	Marrakech	0663822776
Iziki Àbdesadek	President of cooperative in CFQMAM	Marrakech	
Nadia Ghomari	Artisan in traditional menswear	Marrakech	
Mustapha Choual	Artisan – table maker	Marrakech	
Youssef Maatouf	Mahouhara luminaires, PME lustres (beneficiary TM Moscow)	Marrakech	
M. Abdelmajid	President associations of Elamri fondouks	Marrakech	
Omar Bouzahr	Leather goods and recycling – blue circuit	Marrakech	0662294586
Hamid Zakroumi	Sandal merchant – green and blue circuits	Marrakech	0670017734
Abdelouahed Echerif	Ceramicist – green circuit	Marrakech	
Oussama Ait Ouhaki	Tadelakt – green circuit	Marrakech	0666663904
Ghazzaoui My Taib	Antiques dealer – brown circuit	Marrakech	0610048857
Salah Zegzouti	Woodworker in kitchen articles in the handicrafts complex	Marrakech	0662683303
M. Kabaj	President, regional association of tour guides	Fez	0661351904
Yater Azzadinne	President, Association Salam (potters)	Fez	0661702394
M. Abdou	Member, Association Salam (potters)	Fez	0662570587
M. Azouz	Ets Serghini	Fez	0661358889 idrissi_aziza@yahoo.fr
Abdenasser Akid	President, Ourika potters' association	Douar Tafza	0678494496
Hafidi Abdel Khalek	President, Association of beneficiaries of gas kilns	Tamesloht	0676304501

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Boubaker Khazif	Kiln buyer	Tamesloht	0661708738
Said Kharbouch	President, potter project beneficiaries association	Essada	0664164702
Omar El Yaoukobi	President, El Baraka association	Mzouda	0661742206
Rachid Ait naît	Secretary, Amal potters' association	Mzouda	- 0667967786
M. Thifa	President, potters' cooperative	Fez	

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Annex 2: Documents Reviewed

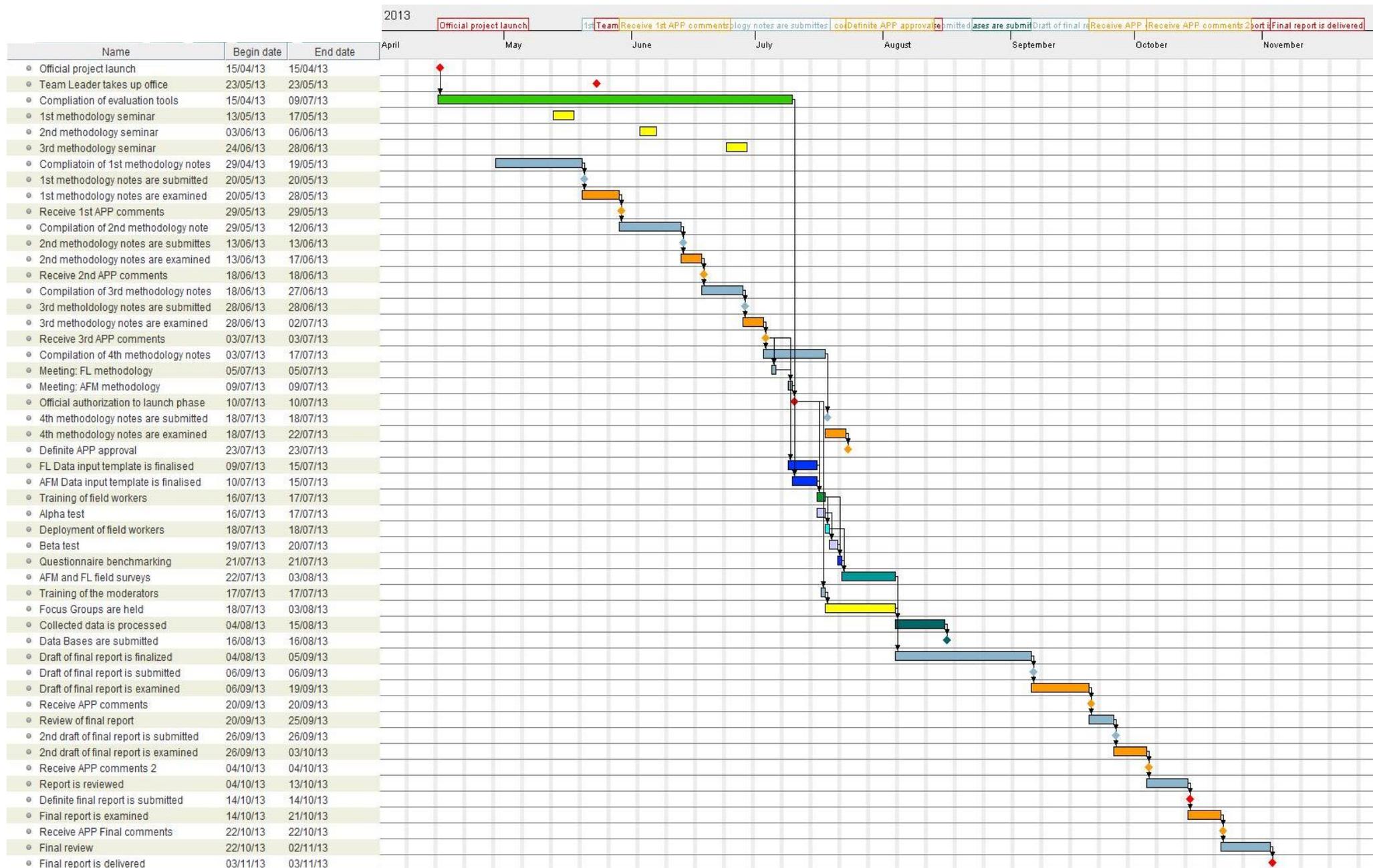
Title	Contenu
APP_Benchmark_VDEF	Valyans Evaluation: Benchmarking of MCA operations deployed in Georgia and Cape Verde
APP_COS_VDef	Valyans Evaluation: Strategic Orientation Board (03/05/2010)
APP_Diagnosticorganisation_Vdef	Valyans Evaluation: Diagnostic review of the organization and first areas for improvement
APP_Diagnosticprocédures_Vdef	Valyans Evaluation: Diagnostic review of procedures and first areas for improvement
APP_Scénariicibles_Vdef	Valyans Evaluation: Presentation of operational scenarios of the MCA-Morocco operation
Audit organisationnel APP (suite)	Valyans Evaluation: Strategic Orientation Committee (16/04/2010)
Compact V. Anglais	MCC English (31/08/2007)
ME Plan Morocco 8 Juin 2012 reviewed APP	APP M&E Plan English (06/2012)
MOR-ITT-Q18_13-mars_2013_Consolidé AFM & FLVT	Indicator Tracking Table (25/03/2013)
Rapport Mensuel AFM-Fin Fév 2013-Version finalisé	Monthly Report AFM-End Feb 2013-Final Version
Rapport Mensuel AFM-Fin Jan 2013-Version finalisé	Monthly Report AFM-End Jan 2013-Final Version
Rapport Mensuel AFM-Fin Mars 2013-Version finalisé	Monthly Report AFM-End March 2013-Final Version
Rapport Recadrage AFM	AFM Restructuring Report
AFM4-beneficiaries reels	Beneficiaries of Fez, Marrakech, and international
Evaluation « MP » du programme MCA-Morocco du 24 Juin 2011	Mid-term Evaluation of entire compact
Livrable II – diagnostic et état des lieux	Volume I: AFM studies of promotion needs (description of analysis) Volume II: graphics Volume III: AFM studies of promotion needs (description of outcomes)
afm-4_beneficiaries réels Promotion	DB Beneficiaries AFM Promotion
DII_Charts	Evaluation ATA-Solimar Deliverable 2: Evaluation Annex: Graphics (AFM Promotion)
DII_Tome 1	Evaluation ATA-Solimar Livrable 2: Evaluation Volume 1: Description and analysis (AFM Promotion)
DII_Tome 2	Evaluation ATA-Solimar Deliverable 2: Evaluation Volume 2: Description of outcomes (without annex) (AFM Promotion)
DII_Tome 2_Complet	Evaluation ATA-Solimar Deliverable 2: Evaluation Volume 2: Description of outcomes (with annex) (AFM Promotion)
Evaluation « MP » du programme MCA Morocco 24 Juin 2011	Ikesol Mid-term Evaluation MCA
Evaluation_Atelier de restitution	Evaluation ATA-Solimar Deliverable 2: Evaluation Volume 3: Review workshop (AFM Promotion)
Evaluation_Project pilote	Evaluation ATA-Solimar Deliverable 2: Evaluation Volume 4: Exporting (AFM Promotion)

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NYIGF	Evaluation ATA-Solimar International gifts fair
Etablissement de la SR AFM Production final	Baseline situation AFM Production
Situation de référence AFM Promotion. Final	Baseline situation AFM Promotion
Livrables I à VI Contrat AFM-5	

Annex 3: Project Timetable

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Annex 4: Descriptive Framework of the Components

Production support

Activity: Production support	
Objective	<p>The Production Support activity is coherent with the objective of the Artisan and Fez Medina project, which is “to increase the value added of the tourism and handicrafts sectors” (see TOR for the evaluation), and it is one of the subactivities.</p> <p>Thus, the specific objective of this activity is to “increase the income of artisans in the Fez and Marrakech regions” (see TOR for the evaluation)</p>
Types of interventions	<p>Two main components were implemented to achieve this objective.</p> <p>The first involved upgrading the skills of 2332 potters to improve the quality of their wares, boost their production capacity, and mitigate the adverse environmental impact of their operations. This subactivity was based on accurate identification of the beneficiaries and yielded five training modules covering all areas necessary to guide these artisans toward sustainable development: Design, Marketing, Management, Techniques, and Social and Environmental Aspects.</p> <p>The second component involved a proposal that the potters acquire and use a gas kiln, instead of their highly polluting traditional kilns, with funding that enabled them to purchase the kiln for only 20% of the total cost. This activity was based not only on studies but on demonstrations, firing traditional pottery ware with modern kilns.</p>
Total budget	US\$4,312, 216 (June, 2013 source PMU)
Programmed start/end	September 2010/August 2013
Geographic scope	<p>Marrakech Region: Amez Miz, Hay Essada, Ourika, Mzouda, and Tamesloht.</p> <p>Fez Region: Benjellik, Route Aïn El Wali, Oulad Hemmou, Douar Eddour, Dar Mkhokh, Aïn Nokbi, Sahrij Gnawa, Dar Benâmar, Wisslane, Louajriine, Narjis, Marja, and Mont Fleuri.</p>
Target population (beneficiaries)	2332 potters (20 of them women) were targeted. The group consisted of independent artisans, master artisans, salaried artisans, and artisan assistants. In Fez 938 potters were targeted, and in Marrakech, 1394. (June 2013, source PMU)

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Subactivity: Training of potters	
Objective	<p>This subactivity has a dual objective:</p> <p>To upgrade the skills of the 2332 potters to improve the quality of their wares, boost their production capacity, and modernize their production techniques (see evaluation TOR)</p> <p>To mitigate environmental degradation.</p>
Types of interventions	<p>First, to upgrade the potters’ skills (mission 3 of AFM 1), an accurate list of beneficiaries was drawn up at the outset to learn more about this population and develop a database for managing and monitoring an estimated beneficiary population of 3800 potters.</p> <p>Second, to offer the five training modules over three periods, the following stages were necessary: definition of the approach, organization of logistics, formation of project teams, drafting of training plans, implementation of training activities, and self-evaluation of the training provided.</p> <p>The training activities covered five areas: Marketing (promotion, sales, communication, etc.), Design (materials, trends, design, graphics, packaging). Management (accounting, management, price setting, organization, financing), Techniques (clay, shaping, enamel, drying, firing, kiln venting) Environment (social, social security, environment, etc.).</p>
Total budget	ND
Start/end of the subactivity	September 2010/June 2011
Geographic scope of the subactivity	<p>Marrakech Region: Amez Miz, Hay Essada, Ourika, Mzouda, and Tamesloht.</p> <p>Fez Region: Benjellik, Route Aïn El Wali, Oulad Hemmou, Douar Eddour, Dar Mkhouch, Aïn Nokbi, Sahrij Gnawa, Dar Benâmar, Wisslane, Louajriine, Narjis, Marja, and Mont Fleuri.</p>
Target population (beneficiaries)	2332 potters (20 of them women) were targeted. The group consisted of independent artisans, master artisans, salaried artisans, and artisan assistants. In Fez, 938 potters were targeted, and in Marrakech, 1394. (June 2013, source PMU)
Implementing parties	<p>APP issued international requests for proposals (RFPs) to delegate the activity to a consulting firm. At the same time, it delegated management and monitoring of the activity to a PMU. Payment to the contractor is effected once the PMU and APP approve the deliverables for the various stages of the activity.</p> <p>The PMUs monitor and manage the contractor’s activities, approving the deliverables for the various stages of the activity. A PMU monitors the entire activity with support from the geographic PMUs of the</p>

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	<p>AFM project based in Fez and Marrakech.</p> <p>The consulting firm determines the methodology to be adopted and implements the activities, submitting the respective deliverables. At project conclusion, the consulting firm conducts a self-evaluation of the activities to be carried out.</p> <p>The trainers, who are recruited by the contractor, devise the training programs and serve as instructors for the training activities.</p>
Stakeholders	<p>Potters’ associations played a major role. They were enlisted to participate in informing their members before and during the training.</p>

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Subactivity: Replacement of traditional kilns with gas kilns	
Objective	<p>This subactivity has a dual objective:</p> <p>To modernize a production tool and mitigate the environmental degradation caused by traditional gas kilns by facilitating their replacement with kilns that use cleaner fuel (see evaluation TOR).</p>
Types of interventions	<p>This subactivity is related to the operation to procure gas kilns, install them, and provide training in how to use them.</p> <p>A study on the environmental and social impact (AFM17) of the use of traditional kilns in Fez and Marrakech led to the proposal of measures to mitigate the adverse impacts, the drafting of an environmental management plan, specifications for the purchase of gas kilns, and recommendations for providing training to potters on the environmental aspects of the project.</p> <p>The object of procuring five gas kilns for demonstration purposes was to bring potters in to test the firing of traditional wares in this modern equipment under real conditions.</p> <p>Next, a study was conducted that characterized materials and defects, 101 artisans were provided with technical assistance to procure a gas kiln, and a study on alternative solutions was conducted, complemented by 6 training modules for 12 builders and 3 training modules for 246 artisans.</p> <p>The “Implementation of measures to mitigate the adverse impact of the gas kiln replacement project” component (AFM17M) led to the identification of the protective equipment needed and safety training and information sessions for 246 artisans.</p> <p>The “Finalization of the gas kiln financing procedure” led to financing agreements between the various entities and departments to facilitate financing (AFM2P) of up to 80% of the total cost of the purchase for artisans. This was followed by the operation to procure gas kilns (AFM2), monitoring of the gas kilns that were installed (AFM2C), and the procurement of protective equipment for individuals and groups (AFM17ME).</p>
Total budget	ND
Start/end of the subactivity	March 2009/August 2013
Geographic scope of the subactivity	<p>Marrakech region: Amez Miz, Hay Essada, Ourika, Mzouda, and Tamesloht.</p> <p>Fez Region: Benjellik, Route Aïn El Wali, Oulad Hemmou, Douar Eddour, Dar Mkhokh, Aïn Nokbi, Sahrij Gnawa, Dar Benâmar, Wisslane, Louajriine, Narjis, Marja, and Mont Fleuri.</p>
Target population (beneficiaries)	<p>The target population consisted of independent artisans, master artisans, and salaried artisans.</p> <p>The demonstrations targeted 505 potters (85 in Fez and 418 in Marrakech).</p> <p>A total of 101 artisans were targeted for technical assistance to procure</p>

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	<p>gas kilns.</p> <p>The alternative solutions activity targeted 12 builders and 246 artisans.</p> <p>The operation to monitor the kilns installed targeted the 6 artisans who had acquired kilns.</p> <p>(June 2013, source PMU)</p>
<p>Implementing parties</p>	<p>APP issued international RFPs to delegate the activity to a consulting firm. At the same time, it delegated management and monitoring of the activity to a PMU. Payment to the contractor is effected once the PMU and APP approve the deliverables for the various stages of the activity.</p> <p>The PMUs monitor and manage the contractor’s activities, approving the deliverables for the various stages of the activity. A PMU monitors the entire activity with support from the AFM project’s geographic PMUs based in Fez and Marrakech.</p> <p>The consulting firms determine the methodology to be adopted and implement the activities, submitting the respective deliverables. At project conclusion, the consulting firm conducts a self-evaluation of the activities to be carried out.</p> <p>Below is the list of the main RFPs issued for this subactivity:</p> <ul style="list-style-type: none"> • AFM17: Environmental and Social Impact Assessment (ESIA) • AFM1K: Procurement of the 5 demonstration kilns • AFM1: Project implementation: Identification, TA for the acquisition of gas kilns, alternative solutions • AFM2P: Finalization of the procedures for financing gas kilns • AFM2: Operation to procure gas kilns • AFM 2C: Monitoring of kilns installed • AFM17ME: Procurement of individual and group protective equipment
<p>Stakeholders</p>	<p>Potters’ associations played a major role. They were enlisted to participate in informing their members before and during the training. Their role was also to bring artisans together to participate in the project.</p> <p>Local manufacturers of gas stoves were trained during the exploratory phase known as “alternative solutions.” Their collaboration with the contractor was sought but not followed up on.</p> <p>The Fez IAT and the handicrafts complex of Marrakech (Targa), who both received demonstration kilns, conducted the demonstrations.</p>

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Promotion support:

Activity: Promotion support	
Objective	<p>The Promotion Support activity is coherent with the object of the AFM project, which is “increasing the value added of the tourism and handicrafts sectors,” (see evaluation TOR), and it is one of the subactivities.</p> <p>Thus, the specific objective of this activity is to “sustainably increase the income of artisans in the Fez and Marrakech regions, enabling Moroccan artisans and SMEs to meet the needs of the tourism and export markets” (see TOR for the evaluation).</p>
Types of interventions	<p>Three main components were implemented to meet the objective of this activity:</p> <p>First, promotional campaigns were organized—especially national fairs for independent artisans and international fairs and trade markets for SMEs. The mechanism was complemented with buyers’ visits and press trips.</p> <p>Second, a national label geared to tourism and the export market was created to identify and recognize the origin and manufacture of Moroccan handicrafts.</p> <p>These two subactivities geared to the domestic and export markets were complemented by a subactivity targeting the tourism market that involved the creation of 5 tourism circuits in the Marrakech medina and the revitalization of 6 tourism circuits in the Fez medina.</p>
Total budget	US\$9,357,632 (June 2013, source PMU)
Programmed start/end	August 2012/August 2013
Geographic scope	<p>The Fez and Marrakech regions, for the promotional campaigns and tourism circuit subactivities.</p> <p>Morocco, for the national label subactivity.</p>
Target population (beneficiaries)	<p>370 SMEs, independent artisans, and cooperatives for the promotional campaigns.</p> <p>6603 artisans and merchants placed along the Fez and Marrakech tourism circuits.</p> <p>All independent artisans, SMEs and cooperatives operating in Morocco’s handicrafts sector.</p> <p>(June 2013, source PMU)</p>

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Subactivity: Label	
Objective	The objective of this subactivity is to create a national label for Moroccan handicrafts to boost sales to tourists and Moroccan handicraft exports. It will enable consumers to identify and recognize the origin and manufacture of Moroccan handicrafts and showcase the products.
Types of interventions	<p>Following a review of the state of handicraft labeling operations and the presentation of several labeling scenarios and their operational modalities, the one-label scenario was endorsed by Moroccan institutions. Once the work plan was submitted, the specifications, logo, graphics specifications, labeling process, and control of the label were presented and endorsed. The right to use the national label is based on three levels of compliance: Level 1 (Basic criteria and collective certification marks; Level 2 (Good Management Practices), and Level 3 (Corporate Social Responsibility).</p> <p>The project period is considered a pilot phase for getting the label off the ground. The DRA and CMA are proposing candidates endorsed by the Minister. The consultant itself is auditing the 30 companies.</p> <p>A promotional campaign targeting the media and general public is currently under way (June 2013). The campaign is complemented with activities targeting sectoral actors, which include the training of auditors for handicrafts offices and chambers to enable them to master the eligibility criteria and processes. Training trainers should enable instructors at training centers to teach sectoral actors about the concept behind the label. Such training activities will be complemented with informational sessions targeting different sectoral actors.</p> <p>An evaluation of artisans’ participation and involvement, coupled with a general assessment of the value added that will accrue from the national label and its establishment will mark the end of the consulting firm’s intervention.</p> <p>Managing the label will then be the responsibility of the Ministry, which will ensure its proper use. In the post-project period, a call for expressions of interest is expected to be sent out to enterprises to obtain candidates from among cooperatives, independent artisans, or SMEs.</p>
Total budget	US\$1,130,062 (June 2013, source PMU)
Start/end of the subactivity	June 2012/August 2013
Geographic scope of the subactivity	Morocco
Target population (beneficiaries)	<p>All independent artisans, SMEs, and cooperatives operating Morocco’s handicrafts sector.</p> <p>145 auditors and 81 trainers were trained by the project, and 212 actors have been briefed. (June 2013, source PMU)</p>
Implementing parties	APP issued international RFPs to delegate the activity to a consulting firm. At the same time, it delegated management and monitoring of the activity to a PMU. Payment to the contractor is effected once the PMU and APP approve the deliverables for the various stages of the activity.

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	<p>The PMUs monitor and manage the contractor’s work, approving the deliverables for the various stages of the activity. A PMU monitors the entire activity with support from the AFM project’s geographic PMUs based in Fez and Marrakech.</p> <p>The consulting firm determines the methodology to be adopted and implements the activities, submitting the respective deliverables. At project conclusion, the consulting firm conducts a self-evaluation of the activities to be carried out.</p> <p>The agencies responsible for providing assistance to artisans, such as the Ministry of Handicrafts, the Regional Bureaus, <i>Maison de l’Artisan</i>, the Chambers of Handicrafts, and <i>Fédération des Entreprises d’Artisanat</i> have been involved, each at its own level, in briefing artisans and selecting participants.</p>
<p>Stakeholders</p>	<p>The agencies responsible for providing assistance to artisans, such as the Ministry of Handicrafts, the Regional Bureaus, <i>Maison de l’Artisans</i>, the Chambers of Handicrafts, and <i>Fédération des Entreprises d’Artisanat</i> have been involved, each at its own level, in briefing artisans and selecting participants.</p> <p>The auditors from recognized certification agencies are responsible for providing independent expertise on behalf of the Ministry.</p> <p>Trainers working at training centers are tasked with introducing the concept of labeling to their students.</p>

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Subactivity: Promotional campaigns	
Objective	<p>This subactivity, which targets two distinct groups, has a dual objective, namely:</p> <p>To increase exports of SME handicrafts through an approach centered on the needs of exporters and importers, based on customers’ habits by geographic location.</p> <p>To improve the ability of independent artisans to use manufacturing processes that respect the environment and a marketing approach geared to the design, production, and sale of handicrafts suitable for tourism and export.</p>
Types of interventions	<p>This subactivity involves the organization of 6 types of promotional campaigns: an Expo Artisans fair in Marrakech; national expositions at festivals and fairs; international SME fairs; visits from international buyers; trade markets; and press trips.</p> <p>To select future participants in these promotional campaigns, a call for expressions of interest was issued in the press and radio to publicize the information as widely as possible and a matrix of selection criteria was created. These were followed by 2 focus groups, coupled with information and briefing activities through the regional bureaus.</p> <p>The information was processed and entered into a database that was submitted to the selection committee (Ministry of Handicrafts, <i>Maison de l’Artisan</i>, Chambers of Handicrafts, FEA), which chose the participants.</p> <p>Personalized visits from merchandising experts prefinalized the matching of trades/wares to the target markets and led to the creation of a photo bank for the production of promotional materials.</p> <p>Commercial events were preceded by training and briefing sessions to optimize artisan and SME involvement in the expressions of interest. These were followed by brainstorming sessions to help independent artisans, salaried artisans, and SMEs make business contacts or occasionally alter their business strategy.</p>
Total budget	US\$5,700,000 (June 2013, source PMU)
Start/end of the subactivity	August 2012/August 2013
Geographic scope of the subactivity	Fez and Marrakech regions
Target population (beneficiaries)	124 SMEs, 212 independent artisans, 37 cooperatives distributed evenly between Fez and Marrakech. (June 2013, source PMU)
Implementing parties	<p>APP issued international RFPs to delegate the activity to a consulting firm. At the same time, it delegated management and monitoring of the activity to a PMU. Payment to the contractor is effected once the PMU and APP approve the deliverables for the various stages of the activity.</p> <p>The PMUs monitor and manage the contractor’s activities, approving the deliverables for the various stages of the activity. They monitor the entire activity with support from the AFM project’s geographic PMUs based in</p>

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	<p>Fez and Marrakech.</p> <p>The consulting firm determines the methodology to be adopted and implements the activities, submitting the respective deliverables. At project conclusion, the consulting firm conducts a self-evaluation of the activities to be carried out.</p> <p>The agencies responsible for furnishing support to artisans, such as the Ministry of Handicrafts, the Regional Bureaus, <i>Maison de l'Artisan</i>, the Chambers of Handicrafts, and <i>Fédération des Entreprises d'Artisanat</i> have been involved, each at its own level, in briefing artisans and selecting participants.</p>
Stakeholders	<p>Potters' associations played a major role. They were enlisted to participate in informing their members before and during the expression of interest phase.</p>

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Subactivity: Tourism circuits	
Objective	The objective of this subactivity is to increase the synergy between handicrafts and tourism to boost handicraft sales and promote tourism circuits associated with handicrafts in the Fez and Marrakech medinas.
Types of interventions	<p>Thus, this subactivity is related to the creation of 5 tourism circuits in the Marrakech medina and the revitalization of 6 tourism circuits in the Fez medina.</p> <p>A committee has been formed in both Fez and Marrakech to encourage regional actors to partner with the project and participate in its implementation. These committees have made public statements about key aspects, specifically graphic design, administrative matters, and technical points (placement of directional and informational signs and their translation).</p> <p>An inventory was taken of existing circuits and signage in Fez and mapping was done to create new itineraries in Marrakech. At the same time, a committee of regional actors was formed in the 2 cities to monitor the work and ensure ownership of the project by future beneficiaries.</p> <p>The implementation phase called for different types of expertise, such as cartography, graphic design, or informatics, to identify the circuits, informational materials (maps, pamphlets, etc.) and their graphic design. Next, a detailed study on the execution of the works and technical decisions helped define the specifications so that RFPs could be issued for service providers to manufacture and mount the signs.</p> <p>To ensure the sustainability of the facilities created, a “tourism circuit” agreement was signed (18 March 2013 in Marrakech and 3 June 2013 in Fez) between local authorities and sector service providers. The Regional Tourism Committee and Chambers of Handicrafts will be responsible for promotion (reprinting of paper tools and website maintenance) and the Wilaya will be responsible for signage maintenance.</p> <p>Finally, a survey of circuit frequenting trends should make it possible to determine the initial impact of the circuits.</p>
Total budget	US\$2,516,724 (June 2013, source PMU)
Start/end of the subactivity	June 2012/August 2013
Geographic scope of the subactivity	Fez and Marrakech
Target population (beneficiaries)	Artisans and merchants installed along the circuits: 2163 in Fez and 4440 in Marrakech. (June 2013, source PMU)
Implementing parties	<p>APP issued international RFPs to delegate the activity to a consulting firm. At the same time, it delegated management and monitoring of the activity to a PMU. Payment to the contractor is effected once the PMU and APP approve the deliverables for the various stages of the activity.</p> <p>The PMUs monitor and manage the contractor’s activities, approving the deliverables for the various stages of the activity. They monitor the entire activity with support from the AFM project’s geographic PMUs based in</p>

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	<p>Fez and Marrakech.</p> <p>The consulting firm determines the methodology to be adopted and implements the activities, submitting the respective deliverables. At project conclusion, the consulting firm conducts a self-evaluation of the activities to be carried out.</p>
Stakeholders	<p>Regional and local authorities have been involved in the approval of each major phase of the project.</p> <p>Representatives of residents, artisans, merchants, and tourism professionals (travel agencies, hoteliers) sat on a committee to monitor the project.</p> <p>Tourism professionals (travel agencies, tour operators, hoteliers, hotel chambers) and their representatives.</p>

Annex 5: Logical Framework - Artisans

Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
- GENERAL OBJECTIVE (IMPACT):				
- Increase the value added of the tourism and handicrafts sectors		- Poverty rate - Total tourist spending in Fez (Source: Compact)	- National and sectoral statistics - Sectoral studies, if available	- Economic situation - Inflation
SPECIFIC OBJECTIVES (OUTCOMES – DIRECT EFFECTS):				
Production support - Contribution to boosting the income of artisans in the Fez and Marrakech regions - Improvement in the quality of handicrafts - Greater production capacity - Improved production techniques - Mitigation of environmental degradation from traditional kilns	- US\$4,351 per year (Source: MEP June 2012) - 0% - 30%	- 15% increase (Source: Compact) in average annual income of independent and salaried artisans, or US\$5,003 per year - 60% of the potters trained adopted the practices recommended by the project (Source: MEP June 2012) and reorganization report) - An average of 5% of total pottery fired broken in the course of firing. (Source: MEP June 2012)	- Survey - Secondary sources - Mid-term evaluation report - Sectoral studies - Interviews with managers - Surveys of beneficiaries - Focus groups	- Beneficiaries take ownership of project objectives. - Risks of tourism and export markets - Providers fail to respond to RFPs - Inflexibility of banks

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Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
- GENERAL OBJECTIVE (IMPACT):				
- Increase the value added of the tourism and handicrafts sectors		- Poverty rate - Total tourist spending in Fez (Source: Compact)	- National and sectoral statistics - Sectoral studies, if available	- Economic situation - Inflation
- SPECIFIC OBJECTIVES (OUTCOMES):				
Promotion support - Sustainable increase in income of independent artisans and SMEs linked to the export and tourism markets - Handicraft exports - Identification of the origin of Moroccan handicrafts and their showcasing for consumers - Greater synergy between handicrafts and tourism	- US\$29,137 per year for MEs (Source: MEP June 2012)	- Increase in average net ME income (sales minus overhead) (Source: MEP June 2012) - Number of jobs created by campaign beneficiaries - Changes in wages and benefits of campaign participants who received price inquiries - Trends in the way tourists purchase handicrafts - % of campaign participants who received requests for samples - % of campaign participants who received orders - 30 microenterprises using the label on at least one of their products	- Survey - Secondary sources - Mid-term evaluation report - Sectoral studies - Interviews with managers - Surveys of beneficiaries - Focus groups	- Beneficiaries take ownership of project objectives. - Providers fail to respond to RFPs - Inflexibility of banks - Risks of tourism and export markets

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Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
EXPECTED RESULTS (Outputs):				
<p>Training of potters:</p> <ul style="list-style-type: none"> - Potters putting the basic principles of marketing, management, design, new production techniques, and social, environmental, and safety regulations into practice - 		<ul style="list-style-type: none"> - Number of potters who took at least one training module - 2332 artisans identified/ artisans trained - Artisan participation rate in modules 1, 2, and 3 	<ul style="list-style-type: none"> - Survey - Document review - Provider reports - Performance reports - Field visits and observations of activities - Semistructured interviews 	<ul style="list-style-type: none"> - Inability of artisans to obtain the means to implement the practices and learning acquired
<p>Gas kilns:</p> <ul style="list-style-type: none"> - Modernization of the production tool 	0	<ul style="list-style-type: none"> - 144 kilns received by potters with the project subsidy - Adoption rate for alternative solutions to gas kilns. - Gas kiln adoption rate at each of the eligible sites (Saada, Mzouda, Tamesloht) - Ability of kiln purchasers to use the kilns 	<ul style="list-style-type: none"> - Survey - Document review - Provider reports - Performance reports - Field visits and observations of activities - Semistructured interviews 	<ul style="list-style-type: none"> - Effects of intra- and extrasectoral competition - Social resistance

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<p>Promotional campaign:</p> <ul style="list-style-type: none"> - SMEs adopting an approach focusing on exporter and importer needs and based on customer habits by geographic location - SMEs capable of meeting the needs of the tourism and export market - Independent artisans employing environmentally friendly procedures and a targeted market approach to the design, production, and sale of handicrafts suited to the tourism and export markets 		<ul style="list-style-type: none"> - 16 fairs organized by independent artisans and SMEs: campaigns targeting domestic and international tourists - 200 artisans who participated in at least one fair (national or international) or made a business trip - 30 fairs organized by SMEs for tourists and exporters - 130 SMEs that participated in at least one fair (national or international) or made a business trip <p>(Source: MEP June 2012)</p>	<ul style="list-style-type: none"> - Survey - Document review - Provider reports - Performance reports - Field visits and observations of activities - Semistructured interviews 	<ul style="list-style-type: none"> - Social resistance - Cultural resistance
<p>Label:</p> <p>Creation of a national label for Moroccan handicrafts to boost sales to tourists and handicraft exports</p>		<ul style="list-style-type: none"> - Specifications approved - Graphic specifications approved - Label certification process approved - Control process for use of the label approved - Label documentation, specifications, logos, map, etc. - Number of promotional activities 	<ul style="list-style-type: none"> - Survey - Document review - Provider reports - Performance reports - Field visits and observations of activities - Semistructured interviews 	<ul style="list-style-type: none"> - Opposition of reseller and independent artisan and SME customers

Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
EXPECTED RESULTS (Outputs):				
<p><u>Tourism circuits:</u> - Greater synergy between the handicrafts and tourism sectors to boost handicraft sales and promote tourism circuits in the Fez and Marrakech medinas</p>		<ul style="list-style-type: none"> - 6 tourism circuits revitalized in Fez - 5 new circuits created in Marrakech - 228 directional, translated, and informational signs posted in Fez - Number of directional, translated, and informational signs posted in Marrakech 	<ul style="list-style-type: none"> - Survey - Document review - Provider reports - Performance reports - Field visits and observations of activities - Semistructured interviews 	<ul style="list-style-type: none"> - Social resistance - Cultural resistance

Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
ACTIVITIES (Production support)				
<p>Training of potters:</p> <ul style="list-style-type: none"> - Training courses in five (5) modules: management, design, marketing, techniques, safety 		<ul style="list-style-type: none"> - Identification of consulting firm to carry out the activity. - Number of training sessions and modules given 		<ul style="list-style-type: none"> - Acceptable responses to RFPs - Availability of potters - Availability of donor funds
<p>Gas kilns:</p> <ul style="list-style-type: none"> - Implementation of an environmental and social impact study (ESIA) on the use of gas kilns in Fez and Marrakech - Implementation of environmental and social impact mitigation measures - Finalization of gas kiln financing procedure - Implementation of the “production support” activity: identification of beneficiaries, demonstrations, TA training, funding requests, alternative solutions. - Operation to procure 144 gas kilns, install them, and train potters in their use 		<ul style="list-style-type: none"> - Identification of consulting firms to carry out the activity - Impact assessment conducted - Specifications for procurement of protective equipment defined - Number of specific safety training sessions for kiln purchasers held - Number of safety workshops held - Financing agreement between financing agencies - Census database - Number of gas kiln demonstration firings - Materials study - TA report to support artisan financing - Study on alternative solutions 	<ul style="list-style-type: none"> - Document review - Service provider reports 	<ul style="list-style-type: none"> - Acceptable responses to RFPs - Availability of potters - Availability of donor funds

Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
ACTIVITIES (Promotion support)				
- Study on Moroccan handicraft promotion needs		- Identification of consulting firm to carry out the activity. - Study report that includes promotion plans -	- Service provider reports	
<p>Promotional campaigns:</p> <ul style="list-style-type: none"> - Campaigns to promote the wares of individual artisans and SMES in Fez and Marrakech - For individual artisans and SMEs: campaign targeting domestic and international tourists - For the SMEs of Fez and Marrakech: campaigns targeting tourists and potential promising export markets (pilot project) 		<ul style="list-style-type: none"> - Identification of consulting firm to carry out the activity. - Number of attendees at international fairs - Number of national fairs held - Number of media tours organized - Number of press trips - Number of trade marketing activities held - Number of visits from buyers 	<ul style="list-style-type: none"> - Document review - Service provider reports 	<ul style="list-style-type: none"> - Acceptable responses to RFPs - Availability of independent artisans and SMEs - Availability of donor funds
<p>Label: Adoption of a national label: information dissemination, communication, and promotion of the national handicrafts label, which will indicate the origin and manufacture of Moroccan handicrafts.</p>		<ul style="list-style-type: none"> - Identification of consulting firm to carry out the activity. - Status of labeling companies - Labeling scenarios and operational modalities identified - General contract work plan and launch of workshop - Specifications and graphics standards - Number of training and publicity activities related to the label - Promotion and communication plans 	<ul style="list-style-type: none"> - Document review - Service provider reports 	<ul style="list-style-type: none"> - Acceptable responses to RFPs - Availability of independent artisans and SMEs - Availability of donor funds

Intervention level	Baseline	Evaluation indicators	Verification source	Assumptions/Risks
ACTIVITIES (Promotion support)				
<p><u>Tourism circuits:</u> - Revitalization and promotion of tourist circuits showcasing handicrafts in the Fez medina - Creation and promotion of new tourist circuits showcasing handicrafts in the Marrakech medina</p>		<ul style="list-style-type: none"> - Identification of consulting firm to carry out the activity. - Inventory of existing circuits and selection of locations for new circuits - Creation of monitoring committees - Maps drawn up - Specifications for service providers - Monitoring of work - Support for signing a sustainability partnership agreement - Development of promotional tools and printed matter 	<ul style="list-style-type: none"> - Document review - Service provider reports 	<ul style="list-style-type: none"> - Acceptable responses to RFPs - Availability of independent artisans and SMEs - Availability of donor funds

Annex 6: Survey of Artisan Beneficiaries

POTTERS WHO PARTICIPATED IN THE TRAINING SESSIONS AND/OR WHO PARTICIPATED IN THE GAS KILN AQUISITION

IDENTIFICATION

Table 1

Q1_Gender					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Male	70	100.0	100.0	100.0

Table 2

Q2_Location					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Fez	27	38.6	38.6	38.6
	Marrakech / Amez Miz	5	7.1	7.1	45.7
	Marrakech / Essada	10	14.3	14.3	60.0
	Marrakech / Ourika	7	10.0	10.0	70.0
	Marrakech / Mzouda	13	18.6	18.6	88.6
	Marrakech / Tamesloht	8	11.4	11.4	100.0
	Total	70	100.0	100.0	

Table 3

Q3_Age					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	26	3	4.3	4.3	4.3
	28	2	2.9	2.9	7.1
	29	5	7.1	7.1	14.3
	30	2	2.9	2.9	17.1
	32	3	4.3	4.3	21.4
	33	2	2.9	2.9	24.3
	35	1	1.4	1.4	25.7
	37	3	4.3	4.3	30.0
	38	6	8.6	8.6	38.6
	39	3	4.3	4.3	42.9
	40	1	1.4	1.4	44.3

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41	3	4.3	4.3	48.6
42	3	4.3	4.3	52.9
43	5	7.1	7.1	60.0
44	2	2.9	2.9	62.9
45	2	2.9	2.9	65.7
46	1	1.4	1.4	67.1
47	2	2.9	2.9	70.0
48	1	1.4	1.4	71.4
49	2	2.9	2.9	74.3
50	3	4.3	4.3	78.6
51	2	2.9	2.9	81.4
52	2	2.9	2.9	84.3
53	1	1.4	1.4	85.7
54	2	2.9	2.9	88.6
55	1	1.4	1.4	90.0
59	1	1.4	1.4	91.4
61	3	4.3	4.3	95.7
62	2	2.9	2.9	98.6
72	1	1.4	1.4	100.0
Total	70	100.0	100.0	

Table 4

Q4_Please indicate your level of education					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No formal education	12	17.1	17.1	17.1
	Pre-primary/Msid	15	21.4	21.4	38.6
	Primary (not completed)	13	18.6	18.6	57.1
	Primary (completed)	11	15.7	15.7	72.9
	Secondary (not completed)	10	14.3	14.3	87.1
	Secondary (completed)	5	7.1	7.1	94.3
	University (not completed)	2	2.9	2.9	97.1
	University (completed)	1	1.4	1.4	98.6
	Professional qualification	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

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Table 5

Q5_ You are:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	SME	22	31.4	31.4	31.4
	Artisan	27	38.6	38.6	70.0
	Master artisan with a salary	16	22.9	22.9	92.9
	Artisan assistant	5	7.1	7.1	100.0
	Total	70	100.0	100.0	

Table 6

Q6_ Is your business involved in exporting?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Yes, we only do exports	1	1.4	1.4	1.4
	Yes, we work in exports and the local market	7	10.0	10.0	11.4
	No, we only work in the local market	62	88.6	88.6	100.0
	Total	70	100.0	100.0	

Table 7

Q7_ Do you have the intention of submitting a funding request to the project to buy a gas kiln?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No	43	61.4	61.4	61.4
	Yes, but the funding was refused	4	5.7	5.7	67.1
	Yes, but I have not yet received a response	5	7.1	7.1	74.3
	Yes, the funding request was granted	8	11.4	11.4	85.7
	Yes, and I have purchased a gas kiln	3	4.3	4.3	90.0

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	Yes, I have received my gas kiln	7	10.0	10.0	100.0
	Total	70	100.0	100.0	

Table 8

Q8_Are you aware of the opportunity to finance a gas kiln?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Yes	64	91.4	91.4	91.4
	No	6	8.6	8.6	100.0
	Total	70	100.0	100.0	

Table 9

Q9.1_Do you currently use a kiln?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	No	9	12.9	12.9	100.0
	A traditional kiln	57	81.4	81.4	100.0
	A gas kiln made locally	19	27.1	27.1	100.0
	An imported gas kiln	3	4.3	4.3	100.0
	A gas kiln bought through this project	7	10.0	10.0	100.0
	Total	70	100.0	100.0	

Table 10

Q10_How many gas kilns do you currently have?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	None	47	67.1	67.1	67.1
	1	16	22.9	22.9	90.0
	2	6	8.6	8.6	98.6
	3	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 11

Q11.1_Which training module did you participate in?					
		Numbers	Percentage	Valid percentage	Cumulative percentage

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Marketing	44	62.9	62.9	100.0
Design	43	61.4	61.4	100.0
Business management	46	65.7	65.7	100.0
Production techniques	50	71.4	71.4	100.0
Environment, social and hygiene	45	64.3	64.3	100.0
Security	49	70.0	70.0	100.0
Total	70	100.0	100.0	

RELEVANCE

Table 12

Q12.1_ Why did you take part in the training?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
To increase your income	48	68.6	68.6	100.0
To increase your productions	39	55.7	55.7	100.0
To increase the quality of your production	47	67.1	67.1	100.0
To improve your production techniques	34	48.6	48.6	100.0
To modernize your production tools	24	34.3	34.3	100.0
In order to reduce pollution from the old wood-fired kilns	28	40.0	40.0	100.0
Total	70	100.0	100.0	

An increase in income is the main motivation for the potters to participate in the training sessions. The next most frequent reasons for their interest are an increase in production, an improvement in product quality, and an improvement in production techniques. Reducing pollution came last.

Table 13

Q13.1_(ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) Why did you participate in the project to replace the kilns with gas ones?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
To increase your income	19	27.1	27.1	100.0
To increase your	22	31.4	31.4	100.0

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production				
To increase the quality of your production	19	27.1	27.1	100.0
To improve your production techniques	15	21.4	21.4	100.0
To modernize your production tools	13	18.6	18.6	100.0
In order to reduce pollution from the old wood-fired kilns	19	27.1	27.1	100.0

The increase in production is the main reason for the potters to request financing for a gas kiln. Next in order of interest: an increase in income, improving product quality, and improving production techniques. Reducing pollution came last.

EFFICIENCY

Table 14

Q14.1_What did the project help you with?					
	Numbers	Percentage	Valid percentage	Cumulative percentage	
To increase your income	43	61.4	61.4	100.0	
To increase your production	26	37.1	37.1	100.0	
To increase the quality of your production	33	47.1	47.1	100.0	
To improve your production techniques	17	24.3	24.3	100.0	
To modernize your production tools	12	17.1	17.1	100.0	
To reduce pollution from the old wood-fired kilns	10	14.3	14.3	100.0	
No improvement followed participation in the project	16	22.9	22.9	100.0	

The artisans felt that the project has principally helped increase their income (61%). Next came the concepts of the improving the quality (47%). 23% of artisans claimed to have seen no improvements following their participation in the project.

Table 15

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Q15_ To what extent were you involved in the design and the implementation of the training activity?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	2	2.9	2.9	2.9
	Not at all	44	62.9	62.9	65.7
	I was interviewed	14	20.0	20.0	85.7
	I was involved in the design	9	12.9	12.9	98.6
	I was interviewed & involved in the design	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

63% of the participants felt that they had not participated in the design and implementation of the training activity.

Table 16

Q16_(ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) To what extent were you involved in the design and the implementation of the activity to replace the kilns with gas ones?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	43	61.4	61.4	61.4
	Not at all	13	18.6	18.6	80.0
	I was interviewed	5	7.1	7.1	87.1
	I was involved in the design	7	10.0	10.0	97.1
	I was involved in the project implementation	1	1.4	1.4	98.6
	I was interviewed & involved in the design	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Only 13% of the artisans who submitted a request for financing to buy a gas kiln felt that they had been involved in the implementation or the design of the project.

Table 17

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Q17_(ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN)					
15. How would you rate the quality? (financial set-up) of the help which you received in order to submit your request for financing?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	43	61.4	61.4	61.4
	Very satisfied	7	10.0	10.0	71.4
	Fairly satisfied	5	7.1	7.1	78.6
	Not very satisfied	9	12.9	12.9	91.4
	Not at all satisfied	6	8.6	8.6	100.0
	Total	70	100.0	100.0	

Only 17% of the artisans who submitted a request for financing for the purchase of a gas kiln felt satisfied with the quality of the help that they received in order to submit their requests for financing.

Table 18

Q18_ All in all, how would you rate the way in which the training activity went?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	1	1.4	1.4	1.4
	Very satisfied	20	28.6	28.6	30.0
	Fairly satisfied	32	45.7	45.7	75.7
	Not very satisfied	8	11.4	11.4	87.1
	Not at all satisfied	5	7.1	7.1	94.3
	No opinion	4	5.7	5.7	100.0
	Total	70	100.0	100.0	

47% of the artisans approved of how the training activities were carried out

Table 19

Q19.1_ Please indicate how the training could have been improved					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	By explaining to us exactly what the activity was	49	70.0	70.0	100.0

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By further involving us in the choice of training content	38	54.3	54.3	100.0
By explaining to us what financial commitment it would require from us when putting the methods which were advocated into place	11	15.7	15.7	100.0
By explaining to us what time commitment it would require from us when putting the methods which were advocated into place	14	20.0	20.0	100.0
Total	70	100.0	100.0	

70% of the participants in the training felt that it could have been improved by explaining exactly what the activity was.

50% of the participants in the training felt that it could have been improved by further involving them in the choice of training content.

Table 20

Q20_ (ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) Overall, how would you judge the way in which the kiln replacement activity took place?					
		Numbers	%	% Valid	Cumulative %
Valid	Not concerned	43	61.4	61.4	61.4
	Very satisfied	7	10.0	10.0	71.4
	Fairly satisfied	7	10.0	10.0	81.4
	Not very satisfied	5	7.1	7.1	88.6
	Not at all satisfied	8	11.4	11.4	100.0
	Total	70	100.0	100.0	

Only 20% of the artisans who submitted a request for financing in order to buy a gas kiln positively judged how the kiln replacement activity went.

Table 21

Q21.1_ (ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) Please tell us how the gas kin replacement activity could have been improved?					
		Numbers	%	% Valid	Cumulative %
	By explaining to us exactly what the activity	15	21.4	21.4	100.0

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was				
By explaining to us what financial commitment it would require from us	16	22.9	22.9	100.0
By explaining to us what time commitment it would require from us	6	8.6	8.6	100.0
By involving us more in the choice of activities to develop	7	10.0	10.0	100.0
By explaining how much effort was involved in terms of the mastery of this new tool	5	7.1	7.1	100.0
By explaining how much administrative work was involved in obtaining financing	5	7.1	7.1	100.0
By involving us more in the study of social and environmental impacts	5	7.1	7.1	100.0
A locale/complex for production	1	1.4	1.4	95.7
Technical explanation was insufficient	1	1.4	1.4	97.1
The kiln was not practical	1	1.4	1.4	98.6
I have not yet received the kiln	1	1.4	1.4	100.0
Total	70	100.0	100.0	

22% of the artisans who submitted a request for financing to buy a gas kiln felt that the gas kiln replacement activity could have been improved by explaining precisely what the activity consisted of.

22% of the artisans who submitted a request for financing to buy a gas kiln felt that the gas kiln replacement activity could have been improved by explaining what financial commitments it would have required from them.

Table 23

Q23_ On average, how long did it take you to get to the training site?				
	Numbers	%	% Valid	Cumulative %
Not concerned	4	5.7	5.7	5.7
Less than 30 minutes	47	67.1	67.1	72.9
Between 30 minutes and a half hour	17	24.3	24.3	97.1
More than an hour	2	2.9	2.9	100.0
Total	70	100.0	100.0	

For 67% of the artisans, the training site was less than a half-hour from their home.

Table 24

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Q24_ Was the length of this trip convenient for you?				
	Numbers	%	% Valid	Cumulative %
Not concerned	4	5.7	5.7	5.7
Yes, it did not pose any major problems for me	57	81.4	81.4	87.1
The length of the trip was decidedly too long	9	12.9	12.9	100.0
Total	70	100.0	100.0	

For 81% of the artisans the length of the trip to the training site was convenient.

Table 25

Q25_ To what extent were the training times convenient in regards to your family life?				
	Numbers	%	% Valid	Cumulative %
Not concerned	5	7.1	7.1	7.1
They were perfectly convenient	36	51.4	51.4	58.6
They were mostly convenient	16	22.9	22.9	81.4
They were not very convenient	11	15.7	15.7	97.1
They were not convenient at all	2	2.9	2.9	100.0
Total	70	100.0	100.0	

With regards to their family life, the training schedule was convenient for 74% of the artisans.

Table 26

Q26_ To what extent were the training times convenient in regards to your professional activities?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	5	7.1	7.1
	They were perfectly convenient	29	41.4	48.6
	They were mostly convenient	20	28.6	77.1
	They were not very convenient	14	20.0	97.1
	They were not convenient at all	2	2.9	100.0
	Total	70	100.0	100.0

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With regards to their professional activities, the training schedule was convenient for 70% of the artisans.

Table 27

Q27_ The project attempted to promote new practices, notably in the domain of production techniques. To what level have you adopted them?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	8.6	8.6	8.6
	I have totally adopted them	21	30.0	30.0	38.6
	I have mostly adopted them	23	32.9	32.9	71.4
	I have mostly not adopted them	9	12.9	12.9	84.3
	I have not adopted them at all	11	15.7	15.7	100.0
	Total	70	100.0	100.0	

62% of the artisans feel that they have adopted the new practices promoted by the project in the domain of production techniques.

Table 28

Q28_ The project attempted to promote new practices, notably in the domain of design. To what level have you adopted them?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	8.6	8.6	8.6
	I have totally adopted them	14	20.0	20.0	28.6
	I have mostly adopted them	21	30.0	30.0	58.6
	I have mostly not adopted them	17	24.3	24.3	82.9
	I have not adopted them at all	12	17.1	17.1	100.0

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	Total	70	100.0	100.0	
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50% of the artisans feel that they have adopted the new practices promoted by the project in the domain of design.

Table 29

Q29_ The project attempted to promote new practices, notably in the domain of marketing. To what level have you adopted them?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	8.6	8.6	8.6
	I have totally adopted them	12	17.1	17.1	25.7
	I have mostly adopted them	22	31.4	31.4	57.1
	I have mostly not adopted them	15	21.4	21.4	78.6
	I have not adopted them at all	15	21.4	21.4	100.0
	Total	70	100.0	100.0	

48% of the artisans feel that they have adopted the new practices promoted by the project in the domain of marketing.

Table 30

Q30_ The project attempted to promote new practices, notably in the domain of business management and environment. To what level have you adopted them?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	5	7.1	7.1	7.1
	I have totally adopted them	12	17.1	17.1	24.3
	I have mostly adopted them	23	32.9	32.9	57.1
	I have mostly not adopted them	18	25.7	25.7	82.9

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	I have not adopted them at all	12	17.1	17.1	100.0
	Total	70	100.0	100.0	

50% of the artisans feel that they have adopted the new practices promoted by the project in the domain of business management and environment.

Table 31

Q31_ The project attempted to promote new practices, notably in the domain of hygiene and safety. To what level have you adopted them?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	8.6	8.6	8.6
	I have totally adopted them	21	30.0	30.0	38.6
	I have mostly adopted them	21	30.0	30.0	68.6
	I have mostly not adopted them	10	14.3	14.3	82.9
	I have not adopted them at all.	12	17.1	17.1	100.0
	Total	70	100.0	100.0	

60% of the artisans feel that they have adopted the new practices promoted by the project in the domain of hygiene and safety.

Table 33

Q33_ FOR SMEs AND ARTISANS WORKING FOR EXPORT (AMONG OTHER THINGS) Following the training course, (production techniques, design, marketing, business management, the environment, and hygiene and safety), how have your sales abroad improved?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	65	92.9	92.9	92.9
	2	2	2.9	2.9	95.7
	No change	3	4.3	4.3	100.0
	Total	70	100.0	100.0	

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92% of the enterprises do not seem to produce for export.

Table 34

Q34_ FOR SMEs AND ARTISANS WORKING FOR EXPORT (AMONG OTHER THINGS) Following the training course, (production techniques, design, marketing, business management, the environment, and hygiene and safety), how have your local market sales improved? (indicate a percentage)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	4	5.7	5.7	5.7
	1	2	2.9	2.9	8.6
	3	3	4.3	4.3	12.9
	4	3	4.3	4.3	17.1
	5	8	11.4	11.4	28.6
	6	1	1.4	1.4	30.0
	10	11	15.7	15.7	45.7
	15	2	2.9	2.9	48.6
	20	3	4.3	4.3	52.9
	25	1	1.4	1.4	54.3
	50	1	1.4	1.4	55.7
	No change	31	44.3	44.3	100.0
	Total	70	100.0	100.0	

Following the training received, 44% of the participants noted no improvement in their sales to the local market.

40% of the participants found that the improvement of their sales on the local market to be less than or equal to 10%. Only 8% mentioned an improvement of their sales of 10 to 25%.

Table 35

Q35_ After the training have you implemented the new commercial practices?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	4	5.7	5.7	5.7
	Yes, I have	8	11.4	11.4	17.1
	I have adopted most of them	13	18.6	18.6	35.7
	I have adopted very few of them	25	35.7	35.7	71.4

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	I have not adopted them at all	20	28.6	28.6	100.0
	Total	70	100.0	100.0	

Only 30% of the artisans reported to have adopted the new commercial practices after the training.

64% of the artisans feel that they have adopted few or none of the new commercial practices after the training.

Table 36

Q36_After the training, have you created new products (on your own, without outside help)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	3	4.3	4.3	4.3
	Yes, I have	14	20.0	20.0	24.3
	I have produced some	6	8.6	8.6	32.9
	I have produced a few	20	28.6	28.6	61.4
	I have not produced any at all	27	38.6	38.6	100.0
	Total	70	100.0	100.0	

Only 29% of the artisan report having created new products on their own after the training.

67% of the artisan report having created only a few or no new products on their own after the training.

Table 37

Q37_After the training have you implemented new techniques of construction or new techniques of glazing?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	4	5.7	5.7	5.7
	Yes, I have	5	7.1	7.1	12.9
	I have adopted most of them	11	15.7	15.7	28.6
	I have adopted very few of them	20	28.6	28.6	57.1
	I have not adopted them at	30	42.9	42.9	100.0

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	all				
	Total	70	100.0	100.0	

Only 16% of the artisans reported having implemented new pottery construction or glazing practices after the training.

Table 38

Q38_After the training, have you modified the management of your business (for example, put in place a ledger of expenses or receipts)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	5	7.1	7.1	7.1
	Yes, I have	7	10.0	10.0	17.1
	I have modified most of them	12	17.1	17.1	34.3
	I have modified very few of them	23	32.9	32.9	67.1
	I have not modified them at all	23	32.9	32.9	100.0
	Total	70	100.0	100.0	

66% of artisans report having not modified their business management at all or very little following the training.

Only 27% report having modified their business practices.

Table 39

Q39_After the training, have you modified your work habits in order to better guarantee the security and safety of your employees (for example, bought a fire extinguisher)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	8.6	8.6	8.6
	Yes, I have	15	21.4	21.4	30.0
	I have modified some of them	11	15.7	15.7	45.7
	I have modified very few of them	12	17.1	17.1	62.9
	I have not modified them at	26	37.1	37.1	100.0

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	all				
	Total	70	100.0	100.0	

54% of the artisans report having not modified their work habits or having modified them very little with the goal of improving the security and safety of their employees following the training.

Only 36% of the artisans report having modified their work with the goal of improving the security and safety of their employees following the training.

Table 40

Q40.1_Please indicate if after the training, you have:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	Implemented the new tool / new commercial practices	21	30.0	30.0	100.0
	Changed the design of some of your products	19	27.1	27.1	100.0
	Started producing new products (on your own, without outside help)	15	21.4	21.4	100.0
	Implemented new techniques for pottery molding	16	22.9	22.9	100.0
	Implemented new firing techniques	9	12.9	12.9	100.0
	Implemented new glazing techniques	14	20.0	20.0	100.0
	Modified your business management	23	32.9	32.9	100.0
	Made some of your employees salaries official	1	1.4	1.4	100.0
	Introduced changes in order to better respect the social laws in your sector	6	8.6	8.6	100.0
	Changed your working habits in order to better ensure the security and safety of your employees	18	25.7	25.7	100.0

Table 41

Q41_ Did you implement the alternative solution which the “metal gas kilns with atmospheric burners” project suggested?					
		Numbers	%	% Valid	Cumulative %
Valid	This alternative was not suggested to me	36	51.4	51.4	51.4

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	This alternative was suggested to me but I was not interested	31	44.3	44.3	95.7
	Yes, I made use of this alternative	3	4.3	4.3	100.0
	Total	70	100.0	100.0	

Only 4% of artisans reported that they made use of the alternative solution proposed by the project.

Table 42

Q42_ Were you interested in the training which the project proposed on the use of the alternative solution “metal gas kilns with atmospheric burners”?					
		Numbers	%	% Valid	Cumulative %
Valid	This alternative was not suggested to me	33	47.1	47.1	47.1
	This alternative was suggested to me but I was not interested	24	34.3	34.3	81.4
	Yes, I attended the training but have not implemented the practices which were taught there	11	15.7	15.7	97.1
	Yes, I attended the training and have implemented the practices which were taught there	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

Only 3% of the artisans report having implemented the lessons learned on the proposed alternative solution.

Table 43

Q43_ Are you aware of the potter’s organization which was created within the framework of this project?					
		Numbers	%	% Valid	Cumulative %
Valid	Yes	62	88.6	88.6	88.6
	No	8	11.4	11.4	100.0
	Total	70	100.0	100.0	

89 % of the potters were aware of the potter’s organization which was created within the framework of this project.

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Table 44

Q44.1_(ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) Please indicate the reasons why you decided to change your kiln.				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Because of the subsidy conditions	22	31.4	31.4	100.0
Because of the technical advantages the new kilns provide	15	21.4	21.4	100.0
Because of the ability to envisage the export of my products	10	14.3	14.3	100.0
In order to abide by environmental standards	16	22.9	22.9	100.0
In order to reduce losses due to breaking during firing	13	18.6	18.6	100.0
Because gas kilns are easy to use	15	21.4	21.4	100.0
In order to produce more sturdy products	7	10.0	10.0	100.0
In order to improve the quality	17	24.3	24.3	100.0
In order to better manage firing costs	10	14.3	14.3	100.0
In order to be independent from climate conditions	11	15.7	15.7	100.0
In order to create employment for women	7	10.0	10.0	100.0
In order to create employment for men	7	10.0	10.0	100.0
Because of the gas kiln demonstrations	8	11.4	11.4	100.0
Because of the demonstrations of new production techniques	6	8.6	8.6	100.0
Safety first	1	1.4	1.4	91.4
To do the same as the others	2	2.9	2.9	94.3
To take part in the creation of the project and training	1	1.4	1.4	95.7
It was an obligation	2	2.9	2.9	98.6
A bargain, a golden opportunity	1	1.4	1.4	100.0
Total	70	100.0	100.0	

The reasons for which the potters had submitted a request for financing to buy a gas kiln were, by order of importance: the subsidy conditions (31%), improvement of quality (24%), being in conformity with environmental norms (23%), the technical advantages provided by the new kilns (21%) and the ease of use of gas kilns (21%).

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Table 46

Q46_(ONLY FOR THOSE SMEs AND ARTISANS WHO SUBMITTED A REQUEST FOR FINANCING TO THE PROJECT IN ORDER TO BUY A GAS KILN) Have you tried to buy a gas kiln?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	41	58.6	58.6	58.6
	No	7	10.0	10.0	68.6
	Yes, but I was only granted some of the funding	6	8.6	8.6	77.1
	Yes, but I received no funding	4	5.7	5.7	82.9
	Yes. I ordered the kiln	3	4.3	4.3	87.1
	Yes. j'ai accepté de réceptionner le four	1	1.4	1.4	88.6
	Yes. I have received the kiln	7	10.0	10.0	98.6
	Yes. but I did not receive the funding + Other	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 48

Q48_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Please indicate whether specific training sessions on safety allowed you to further develop the concept of security (firing/first-aid/using protection equipment/raising alarm/risks linked to gas)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	Yes	5	7.1	7.1	94.3
	No	2	2.9	2.9	97.1
	I did not take this training	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

Table 49

Q49_Please indicate your principal product:
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		Numbers	%	% Valid	Cumulative %
Valid	Not concerned	4	5.7	5.7	5.7
	Zellij	19	27.1	27.1	32.9
	Bricks and tiles	12	17.1	17.1	50.0
	Glazed pottery	28	40.0	40.0	90.0
	Zellij & glazed pottery	2	2.9	2.9	92.9
	Zellij, bricks and tiles	2	2.9	2.9	95.7
	Zellij, bricks, tiles, and glazed pottery	1	1.4	1.4	97.1
	Bricks, tiles, and glazed pottery	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

Table 50.1

Q50.1_ Please indicate what type of kiln you principally use:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	19	27.1	27.1	27.1
	Traditional kiln	51	72.9	72.9	100.0
	Total	70	100.0	100.0	

Table 50.2

Q50.2_ Please indicate what type of kiln you principally use:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	49	70.0	70.0	70.0
	Locally-made gas kiln	21	30.0	30.0	100.0
	Total	70	100.0	100.0	

Table 50.3

Q50.3_ Please indicate what type of kiln you principally use:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	69	98.6	98.6	98.6
	Imported gas kiln	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 50.4

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Q50.4_ Please indicate what type of kiln you principally use:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	67	95.7	95.7	95.7
	Gas kiln bought through the project	3	4.3	4.3	100.0
	Total	70	100.0	100.0	

Table 51

Q51_ Only for traditional kilns: what is the cost of the initial construction materials (in DH)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	14	20.0	20.0	20.0
	500	2	2.9	2.9	22.9
	1000	5	7.1	7.1	30.0
	1200	1	1.4	1.4	31.4
	1300	1	1.4	1.4	32.9
	1500	5	7.1	7.1	40.0
	2000	3	4.3	4.3	44.3
	2500	2	2.9	2.9	47.1
	4000	1	1.4	1.4	48.6
	5000	2	2.9	2.9	51.4
	6000	2	2.9	2.9	54.3
	7000	3	4.3	4.3	58.6
	7500	2	2.9	2.9	61.4
	8000	2	2.9	2.9	64.3
	9000	1	1.4	1.4	65.7
	10000	8	11.4	11.4	77.1
	13500	1	1.4	1.4	78.6
	15000	8	11.4	11.4	90.0
	20000	4	5.7	5.7	95.7
	25000	1	1.4	1.4	97.1
50000	1	1.4	1.4	98.6	
120000	1	1.4	1.4	100.0	
Total		70	100.0	100.0	

Table 52

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

Q52_Only for traditional kilns: how many days of work were necessary?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	14	20.0	20.0	20.0
	2	3	4.3	4.3	24.3
	3	6	8.6	8.6	32.9
	4	6	8.6	8.6	41.4
	5	6	8.6	8.6	50.0
	6	1	1.4	1.4	51.4
	7	4	5.7	5.7	57.1
	8	3	4.3	4.3	61.4
	10	8	11.4	11.4	72.9
	15	6	8.6	8.6	81.4
	18	1	1.4	1.4	82.9
	20	7	10.0	10.0	92.9
	30	3	4.3	4.3	97.1
	45	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

Table 53

Q53_Only for traditional kilns: Per firing, what is the cost of fuel (including transport) in DH?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	14	20.0	20.0	20.0
	50	2	2.9	2.9	22.9
	100	3	4.3	4.3	27.1
	150	2	2.9	2.9	30.0
	175	1	1.4	1.4	31.4
	200	7	10.0	10.0	41.4
	250	4	5.7	5.7	47.1
	300	5	7.1	7.1	54.3
	350	1	1.4	1.4	55.7
	400	3	4.3	4.3	60.0
	600	5	7.1	7.1	67.1
	700	7	10.0	10.0	77.1
	750	1	1.4	1.4	78.6
	800	2	2.9	2.9	81.4
	810	1	1.4	1.4	82.9
	900	1	1.4	1.4	84.3

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

	1000	4	5.7	5.7	90.0
	1200	3	4.3	4.3	94.3
	1400	1	1.4	1.4	95.7
	1500	2	2.9	2.9	98.6
	9000	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 54

Q54_ Only for traditional kilns: what is the lifespan of your kiln (in years)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	14	20.0	20.0	20.0
	8 mois	3	4.3	4.3	24.3
	10	2	2.9	2.9	27.1
	12	1	1.4	1.4	28.6
	15	2	2.9	2.9	31.4
	20	8	11.4	11.4	42.9
	25	2	2.9	2.9	45.7
	28	1	1.4	1.4	47.1
	30	11	15.7	15.7	62.9
	35	1	1.4	1.4	64.3
	40	9	12.9	12.9	77.1
	45	2	2.9	2.9	80.0
	50	4	5.7	5.7	85.7
	60	1	1.4	1.4	87.1
	80	1	1.4	1.4	88.6
	100	1	1.4	1.4	90.0
	My entire life	6	8.6	8.6	98.6
	8 mois	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 55

Q55_ Only for traditional kilns: What is the annual cost of maintenance (in DH)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	14	20.0	20.0	20.0
	100	10	14.3	14.3	34.3
	130	1	1.4	1.4	35.7
	150	6	8.6	8.6	44.3

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200	6	8.6	8.6	52.9
300	6	8.6	8.6	61.4
400	2	2.9	2.9	64.3
500	4	5.7	5.7	70.0
600	3	4.3	4.3	74.3
700	2	2.9	2.9	77.1
800	2	2.9	2.9	80.0
950	1	1.4	1.4	81.4
1000	7	10.0	10.0	91.4
1100	1	1.4	1.4	92.9
1500	2	2.9	2.9	95.7
2000	2	2.9	2.9	98.6
3000	1	1.4	1.4	100.0
Total	70	100.0	100.0	

Table 56

Q56_ Only for gas kilns: what was the buying price (in DH)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	46	65.7	65.7	65.7
	60	1	1.4	1.4	67.1
	10000	1	1.4	1.4	68.6
	14500	1	1.4	1.4	70.0
	15000	2	2.9	2.9	72.9
	20000	1	1.4	1.4	74.3
	25000	1	1.4	1.4	75.7
	35000	1	1.4	1.4	77.1
	45000	1	1.4	1.4	78.6
	50000	3	4.3	4.3	82.9
	55000	1	1.4	1.4	84.3
	60000	1	1.4	1.4	85.7
	70000	1	1.4	1.4	87.1
	90000	1	1.4	1.4	88.6
	94000	1	1.4	1.4	90.0
	100000	2	2.9	2.9	92.9
	120000	2	2.9	2.9	95.7
	145000	2	2.9	2.9	98.6
	450000	1	1.4	1.4	100.0

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

	Total	70	100.0	100.0	
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Table 57

Q57_Only for gas kilns: Per firing, how much (in DH) did you spend in gas? (specify butane or propane)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	46	65.7	65.7	65.7
	1200 Propane. 250 Butane	1	1.4	1.4	67.1
	210 propane	1	1.4	1.4	68.6
	200 Butane	2	2.9	2.9	71.4
	350 per firing (Butane)	1	1.4	1.4	72.9
	450 per firing (butane)	1	1.4	1.4	74.3
	400 (Butane)	2	2.9	2.9	77.1
	500 Butane	1	1.4	1.4	78.6
	No response	4	5.7	5.7	84.3
	325	1	1.4	1.4	85.7
	350	2	2.9	2.9	88.6
	400	2	2.9	2.9	91.4
	1250	2	2.9	2.9	94.3
	1500	1	1.4	1.4	95.7
	1625	1	1.4	1.4	97.1
	1750	1	1.4	1.4	98.6
	15000	1	1.4	1.4	100.0
	Total		70	100.0	100.0

Table 58

Q58_Only for gas kilns: What is the lifespan of your kiln (in years)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	46	65.7	65.7	65.7
	2	5	7.1	7.1	72.9
	4	2	2.9	2.9	75.7
	5	2	2.9	2.9	78.6
	6	1	1.4	1.4	80.0
	7	2	2.9	2.9	82.9
	8	1	1.4	1.4	84.3

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	10	3	4.3	4.3	88.6
	12	1	1.4	1.4	90.0
	15	1	1.4	1.4	91.4
	Still in trial period, no information	6	8.6	8.6	100.0
	Total	70	100.0	100.0	

Table 59

Q59_Only for gas kilns: How often (in months) do you change your insulation and plates (renovation)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	46	65.7	65.7	65.7
	Insulation: 48. Plates: 12	1	1.4	1.4	67.1
	Insulation: 210	2	2.9	2.9	70.0
	5	1	1.4	1.4	71.4
	6	3	4.3	4.3	75.7
	12	6	8.6	8.6	84.3
	36	1	1.4	1.4	85.7
	48	1	1.4	1.4	87.1
	60	1	1.4	1.4	88.6
	Still in trial period, no information	8	11.4	11.4	100.0
	Total	70	100.0	100.0	

Table 60

Q60_Only for gas kilns: How much does this renovation cost (in DH)?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	46	65.7	65.7	65.7
	Insulation: 4000dh/an. plates: 6000dh/year	1	1.4	1.4	67.1
	Still in trial period, no information	7	10.0	10.0	77.1
	300	1	1.4	1.4	78.6
	900	1	1.4	1.4	80.0
	1000	5	7.1	7.1	87.1

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1500	4	5.7	5.7	92.9
2000	2	2.9	2.9	95.7
3000	1	1.4	1.4	97.1
8000	1	1.4	1.4	98.6
8500	1	1.4	1.4	100.0
Total	70	100.0	100.0	

IMPACT

Table 61

Q61_ For each statement, please tell me to what degree you agree or disagree.					
Following the project, the quality of my family life was improved.					
		Numbers	%	% Valid	Cumulative %
Valid	I fully agree	11	15.7	15.7	15.7
	I mostly agree	22	31.4	31.4	47.1
	I mostly disagree	12	17.1	17.1	64.3
	I fully disagree	20	28.6	28.6	92.9
	No response	5	7.1	7.1	100.0
	Total	70	100.0	100.0	

47% of the potters think that the project improved the quality of their family life.

Table 62

Q62_ For each statement, please tell me to what degree you agree or disagree:					
Following the project, the quality of my professional life was improved.					
		Numbers	%	% Valid	Cumulative %
Valid	I fully agree	12	17.1	17.1	17.1
	I mostly agree	27	38.6	38.6	55.7
	I mostly disagree	12	17.1	17.1	72.9
	I fully disagree	13	18.6	18.6	91.4
	No response	6	8.6	8.6	100.0
	Total	70	100.0	100.0	

46% of the potters feel that the project improved the quality of their professional life.

Table 63

Q63_ For each statement, please tell me to what degree you agree or disagree:					
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Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

Following the project, I have more time to pursue my personal interests.					
		Numbers	%	% Valid	Cumulative %
Valid	I fully agree	9	12.9	12.9	12.9
	I mostly agree	22	31.4	31.4	44.3
	I mostly disagree	16	22.9	22.9	67.1
	I fully disagree	18	25.7	25.7	92.9
	No response	5	7.1	7.1	100.0
	Total	70	100.0	100.0	

Table 64

Q64_ Following the project, I have more time to dedicate to the conception of new products.					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	10	14.3	14.3	14.3
	I mostly agree	19	27.1	27.1	41.4
	I mostly disagree	12	17.1	17.1	58.6
	I fully disagree	24	34.3	34.3	92.9
	No response	5	7.1	7.1	100.0
	Total	70	100.0	100.0	

The majority of potters did not have more time to dedicate to the conception of new products following the project.

Table 65

Q65- Following the project, I have more time to dedicate to researching new markets					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	10	14.3	14.3	14.3
	I mostly agree	17	24.3	24.3	38.6
	I mostly disagree	8	11.4	11.4	50.0
	I fully disagree	30	42.9	42.9	92.9
	No response	5	7.1	7.1	100.0
	Total	70	100.0	100.0	

The majority of potters did not have more time to dedicate to researching new markets following the project.

Table 66

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

Q66_How much have the profits of your business (or, for solo artisans, your income) changed following the adoption of the techniques learned during your training? (indicate a percentage)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	-10	1	1.4	1.4	1.4
	Not concerned	15	21.4	21.4	22.9
	1	1	1.4	1.4	24.3
	2	1	1.4	1.4	25.7
	3	1	1.4	1.4	27.1
	4	1	1.4	1.4	28.6
	5	4	5.7	5.7	34.3
	6	1	1.4	1.4	35.7
	7	1	1.4	1.4	37.1
	10	8	11.4	11.4	48.6
	15	4	5.7	5.7	54.3
	20	3	4.3	4.3	58.6
	25	1	1.4	1.4	60.0
	30	1	1.4	1.4	61.4
	40	2	2.9	2.9	64.3
	50	2	2.9	2.9	67.1
	60	1	1.4	1.4	68.6
	No response	1	1.4	1.4	70.0
	No change	21	30.0	30.0	100.0
Total	70	100.0	100.0		

30% of the potters felt that their business profits or their income (for solo artisans) did not change following the training.

48% of the potters felt that their business profits or their income (for solo artisans) increased 10% or less following the training.

Table 67

Q67_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did the replacement of your wood-fired kiln allow you to:					
Improve your working conditions?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	Yes	3	4.3	4.3	91.4

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	No	4	5.7	5.7	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

Only 3 potters out of 8 who received a gas kiln felt that the replacement of their wood-burning kiln improved their working conditions.

Table 68

Q68_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did the replacement of your wood-fired kiln allow you to: Pollute less?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	Yes	6	8.6	8.6	95.7
	No	1	1.4	1.4	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

6 potters out of 8 who received a gas kiln felt that the replacement of their wood-burning kiln allowed them to pollute less.

Table 69

Q69_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did the replacement of your wood-fired kiln allow you to: be more independent of climate conditions					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	Yes	4	5.7	5.7	92.9
	No	3	4.3	4.3	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

4 potters out of 8 who received a gas kiln felt that the replacement of their wood-burning kiln allowed them to be more independent of climate conditions.

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Table 70

Q70_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did the replacement of your wood-fired kiln allow you to: create employment for women					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	No	7	10.0	10.0	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

No potters who received a gas kiln felt that the replacement of their wood-burning kiln allowed them to create employment for women

Table 71

Q71_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did the replacement of your wood-fired kiln allow you to: create employment for men					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	No	7	10.0	10.0	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

No potters who received a gas kiln felt that the replacement of their wood-burning kiln allowed them to create employment for men

Table 72

Q72_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Please indicate what percentage of the pottery items break during firing in the gas kiln (Select a percentage):					
		%	%	% Valid	Cumulative %
Valid	Not concerned	61	87.1	87.1	87.1
	Less	1	1.4	1.4	88.6
	10 %	1	1.4	1.4	90.0
	In trial period, no information	3	4.3	4.3	94.3
	No response	1	1.4	1.4	95.7

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	No change	2	2.9	2.9	98.6
	3500	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

The majority of potters who received a gas kiln did not give information regarding the quantity of pottery broken, as it was still during the trial period.

Table 73

Q73_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Please indicate if the gas kiln allowed you to obtain the quality of glaze you would like.					
		%	%	% Valid	Cumulative %
Valid	Not concerned	61	87.1	87.1	87.1
	Yes	2	2.9	2.9	90.0
	No	5	7.1	7.1	97.1
	No response	2	2.9	2.9	100.0
	Total	70	100.0	100.0	

5 potters out of 8 indicated that the gas kiln did not allow them to obtain the quality of glaze they desired.

Table 74

Q74_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Please indicate whether you experienced problems when trying to use the gas kiln according to the instructions given during the training?					
		%	%	% Valid	Cumulative %
Valid	Not concerned	61	87.1	87.1	87.1
	Just a few adjustments to be made	2	2.9	2.9	90.0
	Yes, we are not yet able to use it	2	2.9	2.9	92.9
	No & Other	1	1.4	1.4	94.3
	Yes, we are not yet able to use it & Other	1	1.4	1.4	95.7
	No response	3	4.3	4.3	100.0
	Total	70	100.0	100.0	

One sole potter out of the 8 who received a gas kiln reported having no further problems with it.

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Table 76

Q76_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Did using the gas kiln allow you to:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	62	88.6	88.6	88.6
	Others	4	5.7	5.7	94.3
		1	1.4	1.4	95.7
	Still in trial period no information	2	2.9	2.9	98.6
	No response	1	1.4	1.4	100.0
	Less polluted	1	1.4	1.4	94.3
	Not yet in a position to say	3	4.3	4.3	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

One sole potter out of the 8 who received the gas kiln indicated that it allowed him to reduce delays in production, master breakage during firing and pollute less.

Table 78

Q78_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT To what extent did the gas kiln allow you to improve your sales on the national and/or international market?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	62	88.6	88.6	88.6
	In trial period, no information	1	1.4	1.4	90.0
	No response	1	1.4	1.4	91.4
	No change	6	8.6	8.6	100.0
	Total	70	100.0	100.0	

6 out of 8 potters who received a gas kiln indicated no change in the development of their sales in the national or international market.

Table 79

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Q79_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT By how much did your company profits (for artisans: your income) change after you replaced the wood fired kiln with a gas kilns? (Select a percentage)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	-40	1	1.4	1.4	1.4
	Not concerned	62	88.6	88.6	90.0
	In trial period, no information	2	2.9	2.9	92.9
	No response	1	1.4	1.4	94.3
	No change	4	5.7	5.7	100.0
	Total	70	100.0	100.0	

None of the potters who received a gas kilns indicated a change in their income after using the gas kiln.

SUSTAINABILITY

Table 80

Q80_ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT For each statement, please indicate to what extent you agree or disagree.					
I fully agree					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	I am able to carry the costs of using the gas kiln and I am able to produce enough to cover these costs	2	2.9	2.9	90.0
	I do not foresee any future problems linked to the use of the gas kiln	6	8.6	8.6	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

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6 out of the 8 potters who received a gas kiln do not foresee future problems linked to their use of the gas kiln.

Table 81

Q81_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT For each statement, please indicate to what extent you agree or disagree.					
I mostly agree					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	62	88.6	88.6	88.6
	I am able to carry the costs of using the gas kiln and I am able to produce enough to cover these costs	1	1.4	1.4	90.0
	I do not foresee any future problems linked to the use of the gas kiln	6	8.6	8.6	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 82

Q82_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT For each statement, please indicate to what extent you agree or disagree.					
I mostly disagree					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	61	87.1	87.1	87.1
	I am able to carry the costs of using the gas kiln and I am able to produce enough to cover these costs	6	8.6	8.6	95.7
	I do not foresee any future problems linked to the use of the gas kiln	2	2.9	2.9	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

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6 out of the 8 potters who received a gas kiln mostly disagree with the idea that they will be able to support the costs of the kiln in the future.

Table 83

Q83_ ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT For each statement, please indicate to what extent you agree or disagree.					
I fully disagree					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	62	88.6	88.6	88.6
	I am able to carry the costs of using the gas kiln and I am able to produce enough to cover these costs	6	8.6	8.6	97.1
	I do not foresee any future problems linked to the use of the gas kiln	1	1.4	1.4	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

Table 84

Q84_(ONLY OR THOSE BELONGING TO AN ASSOCIATION) Beyond the collective acquisition operation for the gas kilns, how would you rate the quality of the services provided by the association or group of which you are a member?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	29	41.4	41.4	41.4
	Very satisfied	16	22.9	22.9	64.3
	Fairly satisfied	7	10.0	10.0	74.3
	Not very satisfied	1	1.4	1.4	75.7
	Not at all satisfied	5	7.1	7.1	82.9
	No opinion	6	8.6	8.6	91.4
	I am not a member of any of these organizations	5	7.1	7.1	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

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33% of the potters asked felt satisfied or fairly satisfied with the services furnished by the association or group of which they were members.

Table 85

Q85 ONLY FOR THOSE SMEs AND ARTISANS WHO RECEIVED A GAS KILN THROUGH THE PROJECT Have you completely abandoned your former practices of firing in wood-fired kilns?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	60	85.7	85.7	85.7
	Yes. totally	1	1.4	1.4	87.1
	Yes, around 60%	1	1.4	1.4	88.6
	Yes, around 40%	1	1.4	1.4	90.0
	No, I am continuing to work exactly as before	6	8.6	8.6	98.6
	No response	1	1.4	1.4	100.0
	Total	70	100.0	100.0	

6 potters out of 8 who received a gas kiln stated to have not abandoned the old practices of wood-kiln firing.

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AFM Evaluation - artisans/promotional campaigns

IDENTIFICATION

Table 1

Gender					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Male	33	78.6	78.6	78.6
	Female	9	21.4	21.4	100.0
	Total	42	100.0	100.0	

Table 2

Professional identification					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	SME	19	45.2	45.2	45.2
	Solo artisan	17	40.5	40.5	85.7
	Cooperative	6	14.3	14.3	100.0
	Total	42	100.0	100.0	

Table 3

Location					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Fez	21	50.0	50.0	50.0
	Marrakech	21	50.0	50.0	100.0
	Total	42	100.0	100.0	

Table 4

Age					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	26	1	2.4	2.4	2.4
	27	1	2.4	2.4	4.8
	32	1	2.4	2.4	7.1
	33	1	2.4	2.4	9.5
	35	4	9.5	9.5	19.0
	38	3	7.1	7.1	26.2
	39	1	2.4	2.4	28.6

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40	1	2.4	2.4	31.0
41	4	9.5	9.5	40.5
42	1	2.4	2.4	42.9
43	1	2.4	2.4	45.2
45	1	2.4	2.4	47.6
47	2	4.8	4.8	52.4
48	2	4.8	4.8	57.1
50	1	2.4	2.4	59.5
51	1	2.4	2.4	61.9
52	1	2.4	2.4	64.3
53	1	2.4	2.4	66.7
55	3	7.1	7.1	73.8
56	1	2.4	2.4	76.2
57	3	7.1	7.1	83.3
59	1	2.4	2.4	85.7
60	2	4.8	4.8	90.5
62	2	4.8	4.8	95.2
63	2	4.8	4.8	100.0
Total	42	100.0	100.0	

Table 5

Level of education					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No formal education	1	2.4	2.4	2.4
	Pre-primary/Msid	1	2.4	2.4	4.8
	Primary (not completed)	3	7.1	7.1	11.9
	Primary (completed)	10	23.8	23.8	35.7
	Secondary (not completed)	11	26.2	26.2	61.9
	Secondary (completed)	2	4.8	4.8	66.7
	University (not completed)	4	9.5	9.5	76.2
	University (completed)	6	14.3	14.3	90.5
	Professional qualification	3	7.1	7.1	97.6
	University (completed) and Professional qualification	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

Table 6

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

6.1-Among these activities, in which have you participated?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	International fairs	16	38.1	38.1	100.0
	Marketing missions	11	26.2	26.2	100.0
	Buyer’s visits	5	11.9	11.9	100.0
	National fairs	42	100.0	100.0	100.0
	Organization of the Artisan’s Fair Expo in Marrakech	10	23.8	23.8	100.0

RELEVANCE

Table 7

7.1-Why did you take part in the promotional campaign?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	To increase my income	37	88.1	88.1	100.0
	To obtain new international markets	29	69.0	69.0	100.0
	To obtain new local markets	32	76.2	76.2	100.0
	To find regular orders	26	61.9	61.9	100.0
	To acquire new skills in the promotion of my products	21	50.0	50.0	100.0

The beneficiaries of the promotional campaign indicated that the reasons for their participation were, by order of importance: to increase their incomes, to find new local markets, to find new international markets, and to find regular orders.

EFFICIENCY

Table 8

8.1-In what ways did the promotional campaign help you?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	To increase my income	34	81.0	81.0	100.0

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To obtain new international markets	25	59.5	59.5	100.0
To obtain new local markets	28	66.7	66.7	100.0
To find regular orders	24	57.1	57.1	100.0
To acquire new skills in the promotion of my products	17	40.5	40.5	100.0

81% of the participants stated that they had been helped in increasing their incomes.

On the other hand, only 40% of the participants in the campaign felt that they had been helped to acquire new skills in promoting their products.

Table 9

9.1-Have you heard talk about new tourist circuits in Fez and Marrakech?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
No	7	16.7	16.7	100.0
Yes, on television	5	11.9	11.9	100.0
Yes, in the press	7	16.7	16.7	100.0
Yes, on the radio	2	4.8	4.8	100.0
Yes, from a friend	3	7.1	7.1	100.0
Yes, from a fellow artisan or vendor	21	50.0	50.0	100.0
I was present at the inauguration of the new tourist circuit	1	2.4	2.4	100.0
From the CNRT (centre régional du tourisme/ Regional Tourism Center)	1	2.4	2.4	100.0

The SMEs and solo artisans asked had heard of the new tourist circuits in Fez and Marrakech mainly from a fellow artisan or vendor.

Table 10

10.1- Once the national Moroccan crafts label is in place, do you think it will allow you to:				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Increase your income	29	69.0	69.0	100.0
Obtain new local and international markets	18	42.9	42.9	100.0
Find regular order	26	61.9	61.9	100.0
Acquire new skill in the promotion of my products	16	38.1	38.1	100.0
Assert to my clients that my product	32	76.2	76.2	100.0

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is ‘Made in Morocco’				
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More than 70% of the SME and solo artisans asked thought that when the national label is operational it will allow them to assert that products are made in Morocco and that it will permit them to increase their income.

Table 11

11.1-Please indicate how the activity proposal (design) of the promotion campaign activity could have been improved.				
	Numbers	Percentage	Valid percentage	Cumulative percentage
By explaining to us precisely what the activity was	34	81.0	81.0	100.0
By explaining exactly what budgetary involvement would be required of us	20	47.6	47.6	100.0
By explaining exactly what time involvement would be required of us	19	45.2	45.2	100.0
By involving us further in the choice of which activities to develop	23	54.8	54.8	100.0
By explaining to us what it would mean in terms of following up on future orders (new investment, managing the orders, administration)	17	40.5	40.5	100.0

More than 80% of the participants in the promotional campaign thought that the activity could have been improved by having explained precisely what the activity was.

Table 12

12.1- FOR THOSE WHO PARTICIPATED IN THE INTERNATIONAL FAIRS/MARKETING MISSIONS Did the promotion campaigns allow you to increase your international sales?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Yes, we received new orders and we deliver regularly	8	19.0	19.0	100.0
Yes, we received new orders and some clients have ordered repeatedly	6	14.3	14.3	100.0
Yes, we received new orders but it was difficult to produce them	7	16.7	16.7	100.0
Yes, we received new orders, but it was	3	7.1	7.1	100.0

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difficult to deliver them abroad				
Yes, we received new orders, but there were administrative difficulties (bancs, foreign invoicing, VAT, export documents / international transit)	3	7.1	7.1	100.0
No, but we have been asked for prices (quotes) by potential buyers	3	7.1	7.1	100.0
No, but potential buyers have asked for samples	2	4.8	4.8	100.0
No, we have had no new orders	2	4.8	4.8	100.0

19% of the participants in the international fairs and the marketing missions have received new orders and have been able to deliver them, but most of them have had difficulty producing.

7% of the participants in the international fairs and the marketing missions have had requests for prices and 5% had had requests for samples.

Table 13

13- FOR THOSE WHO PARTICIPATED IN THE INTERNATIONAL FAIRS/MARKETING MISSIONS By what percentage did your export sales increase after you participated in the fairs / marketing missions?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	0	5	11.9	11.9	11.9
	3	1	2.4	2.4	14.3
	5	3	7.1	7.1	21.4
	20	1	2.4	2.4	23.8
	25	1	2.4	2.4	26.2
	30	1	2.4	2.4	28.6
	40	1	2.4	2.4	31.0
	60	1	2.4	2.4	33.3
	70	1	2.4	2.4	35.7
	100	4	9.5	9.5	100.0
	Total	42	100.0	100.0	

9.5% of the participants in the international fairs and the marketing missions have doubled their export sales. 78.5% of the participants have had an average of 32% increase in their export sales. 12% have not increased their export sales.

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Table 14

14.1- FOR THOSE WHO PARTICIPATED IN THE NATIONAL FAIRS				
Did the promotion campaigns allow you to increase your sales on the national market?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Yes, we received new orders and we deliver regularly	27	64.3	64.3	100.0
Yes, we received new orders and some clients have ordered repeatedly	17	40.5	40.5	100.0
Yes, we received new orders but it was difficult to produce them	10	23.8	23.8	100.0
Yes, we received new orders, but it was difficult to deliver them	7	16.7	16.7	100.0
No, but we have been asked for prices (quotes) by potential buyers	2	4.8	4.8	100.0
No, but potential buyers have asked for samples	7	16.7	16.7	100.0
No, we have had no new orders	6	14.3	14.3	100.0
I just started to work	1	2.4	2.4	100.0

64% of participants in the national fairs have received new orders which had been delivered, and the majority of them have had repeat orders.

Only 5% of participants in the national fairs have received requests for price quotes, but 17% have had requests for samples from sellers or exporters.

Table 15

14. 15- FOR THOSE WHO PARTICIPATED IN THE NATIONAL FAIRS					
By what percentage did your national sales increase after you participated in the national fairs?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	0	3	7.1	7.1	7.1
	1	1	2.4	2.4	9.5
	3	3	7.1	7.1	16.7
	4	1	2.4	2.4	19.0
	5	4	9.5	9.5	28.6
	7	1	2.4	2.4	31.0
	10	12	28.6	28.6	59.5
	15	2	4.8	4.8	64.3
	20	5	11.9	11.9	76.2
	25	2	4.8	4.8	81.0

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	30	1	2.4	2.4	83.3
	35	1	2.4	2.4	85.7
	50	3	7.1	7.1	92.9
	70	1	2.4	2.4	95.2
	100	2	4.8	4.8	100.0
	Total	42	100.0	100.0	

7% of the participants in the national fairs saw no increase in their sales. 28% of the participants increased their sales by 10%. 12% increased their sales by 20% and 5% doubled their sales.

Table 16

16- Were you able to create jobs thanks to the project?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No	16	38.1	38.1	38.1
	Yes. one	8	19.0	19.0	57.1
	Yes. two	13	31.0	31.0	88.1
	Yes. three	2	4.8	4.8	92.9
	Yes, more than three	3	7.1	7.1	100.0
	Total	42	100.0	100.0	

38% of the participants did not create any jobs.

31% created two jobs and 12% created three or more.

IMPACT

Table 17

17- The project allowed me to have more free time to spend with my family					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	18	42.9	42.9	42.9
	I mostly agree	12	28.6	28.6	71.4
	I mostly disagree	7	16.7	16.7	88.1
	I fully disagree	5	11.9	11.9	100.0
	Total	42	100.0	100.0	

78.7% of the participants in the promotional campaign felt that the project allowed them to spend more time with their family.

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Table 18

18- The project allowed me to develop new relationships					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	23	54.8	54.8	54.8
	I mostly agree	14	33.3	33.3	88.1
	I mostly disagree	3	7.1	7.1	95.2
	I fully disagree	2	4.8	4.8	100.0
	Total	42	100.0	100.0	

88% of the participants in the promotional campaign felt that the project allowed them to develop new relationships.

Table 19

19- The project broadened my horizons					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	25	59.5	59.5	59.5
	I mostly agree	12	28.6	28.6	88.1
	I mostly disagree	4	9.5	9.5	97.6
	I fully disagree	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

88% of the participants in the promotional campaign felt that the project broadened their horizons.

Table 20

20- The project allowed me to work more comfortably					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	21	50.0	50.0	50.0
	I mostly agree	18	42.9	42.9	92.9
	I mostly disagree	2	4.8	4.8	97.6
	I fully disagree	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

93% of the participants in the promotional campaign felt that the project allowed them to work more comfortably.

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Table 21

21- The project allowed me to reduce wasted time					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	22	52.4	52.4	52.4
	I mostly agree	9	21.4	21.4	73.8
	I mostly disagree	8	19.0	19.0	92.9
	I fully disagree	3	7.1	7.1	100.0
	Total	42	100.0	100.0	

73% of the participants in the promotional campaign felt that the project allowed them to reduce wasted time.

Table 22

22- The project helped me acquire greater bargaining power					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	19	45.2	45.2	45.2
	I mostly agree	21	50.0	50.0	95.2
	I mostly disagree	2	4.8	4.8	100.0
	Total	42	100.0	100.0	

95% of the participants in the promotional campaign felt that the project helped them acquire greater bargaining power.

Table 23

23- The project has allowed me to look to the future more confidently					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	I fully agree	19	45.2	45.2	45.2
	I mostly agree	20	47.6	47.6	92.9
	I mostly disagree	2	4.8	4.8	97.6
	I fully disagree	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

95% of the participants in the promotional campaign felt that the project allowed them to look to the future more confidently.

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Table 24

24- Since you participated in the promotional activities, by what percentage has your profit / income changed? (select a percentage)					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	0	3	7.1	7.1	7.1
	1	1	2.4	2.4	9.5
	2	1	2.4	2.4	11.9
	3	1	2.4	2.4	14.3
	4	1	2.4	2.4	16.7
	5	8	19.0	19.0	35.7
	10	11	26.2	26.2	61.9
	15	2	4.8	4.8	66.7
	20	5	11.9	11.9	78.6
	25	1	2.4	2.4	81.0
	30	1	2.4	2.4	83.3
	35	2	4.8	4.8	88.1
	40	1	2.4	2.4	90.5
	50	1	2.4	2.4	92.9
	60	1	2.4	2.4	95.2
	70	1	2.4	2.4	97.6
	100	1	2.4	2.4	100.0
	Total		42	100.0	100.0

7% of the participants saw no improvement in their sales, 54% increased revenue by 10% or less, 29% increased them by 15 to 40% and only 10% increased them by more than 50%.

SUSTAINABILITY

Table 25

25.1-Following your participation in the promotional activities:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	Your direct clients have increased in number	36	85.7	85.7	100.0
	Your recurrent (more than one order) direct clients	23	54.8	54.8	100.0

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	have increased in number				
	The number of orders you receive from sellers or exporters has increased	14	33.3	33.3	100.0
	The number of recurring orders you receive from sellers or exporters has increased	10	23.8	23.8	100.0
	No noticeable change	2	4.8	4.8	100.0
	Total	42	100.0	100.0	

86% of the participants have increased the number of their clients, 23% have seen an increase in the number of recurring orders, while only 5% have seen no noticeable change.

Table 26

26- I am satisfied with the services offered by the professional association of which I am a member					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	15	35.7	35.7	35.7
	I fully agree	19	45.2	45.2	81.0
	I mostly agree	5	11.9	11.9	92.9
	I mostly disagree	1	2.4	2.4	95.2
	I fully disagree	2	4.8	4.8	100.0
	Total	42	100.0	100.0	

56% of the participants in the project are satisfied with the services offered by the professional association of which they are a member.

Table 27

27- The professional association of which I am a member could continue to help me even after the end of the project					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	15	35.7	35.7	35.7
	I fully agree	19	45.2	45.2	81.0
	I mostly agree	4	9.5	9.5	90.5
	I mostly disagree	3	7.1	7.1	97.6
	I fully disagree	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

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More than 80% of the participants in the project think that the professional association of which they are a member could continue to help them even after the end of the project.

Table 28

28- I am willing to donate some of my time to participate in activities which will benefit the professional association of which I am a member					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	15	35.7	35.7	35.7
	I fully agree	22	52.4	52.4	88.1
	I mostly agree	4	9.5	9.5	97.6
	I mostly disagree	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

62% of the participants in the project are willing to donate some of my time to participate in activities which will benefit the professional association of which I am a member.

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AFM Evaluation – artisans/points of sale on the tourist circuits

IDENTIFICATION

Table 1

Gender					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Male	38	90.5	90.5	90.5
	Female	4	9.5	9.5	100.0
	Total	42	100.0	100.0	

Table 2

Location					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Fez	18	42.9	42.9	42.9
	Marrakech	24	57.1	57.1	100.0
	Total	42	100.0	100.0	

Table 3

Age					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	24	2	4.8	4.8	4.8
	26	1	2.4	2.4	7.1
	27	1	2.4	2.4	9.5
	30	1	2.4	2.4	11.9
	32	1	2.4	2.4	14.3
	33	1	2.4	2.4	16.7
	35	1	2.4	2.4	19.0
	36	1	2.4	2.4	21.4
	37	1	2.4	2.4	23.8
	38	2	4.8	4.8	28.6
	39	1	2.4	2.4	31.0
	40	1	2.4	2.4	33.3
	41	1	2.4	2.4	35.7

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	42	1	2.4	2.4	38.1
	43	1	2.4	2.4	40.5
	44	2	4.8	4.8	45.2
	45	2	4.8	4.8	50.0
	46	2	4.8	4.8	54.8
	47	1	2.4	2.4	57.1
	48	1	2.4	2.4	59.5
	50	2	4.8	4.8	64.3
	51	2	4.8	4.8	69.0
	52	1	2.4	2.4	71.4
	53	2	4.8	4.8	76.2
	54	2	4.8	4.8	81.0
	56	2	4.8	4.8	85.7
	57	1	2.4	2.4	88.1
	59	2	4.8	4.8	92.9
	60	1	2.4	2.4	95.2
	67	1	2.4	2.4	97.6
	76	1	2.4	2.4	100.0
	Total	42	100.0	100.0	

Table 4

Level of education					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No formal education	6	14.3	14.3	14.3
	Pre-primary/Msid	6	14.3	14.3	28.6
	Primary (not completed)	5	11.9	11.9	40.5
	Primary (completed)	10	23.8	23.8	64.3
	Secondary (not completed)	4	9.5	9.5	73.8
	Secondary (completed)	3	7.1	7.1	81.0
	University (not completed)	3	7.1	7.1	88.1
	University (completed)	5	11.9	11.9	100.0
	Professional qualification	42	100.0	100.0	

Table 5

Professional identification. You are:					
		Numbers	Percentage	Valid	Cumulative

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				percentage	percentage
Valid	SME	2	4.8	4.8	4.8
	Solo artisan	17	40.5	40.5	45.2
	A sales point (no production)	23	54.8	54.8	100.0
	Total	42	100.0	100.0	

RELEVANCE

Table 6

6.1- Fez – Did the creation of new tourist circuits (guiding panels, interpretation and information panels) contribute to you:					
		Numbers	%	% Valid	Cumulative %
	Receiving more visits from tourists	17	40.5	40.5	100.0
	Having the possibility to explain your work	7	16.7	16.7	100.0
	Selling more products directly to tourists	13	31.0	31.0	100.0
	Increasing your income	5	11.9	11.9	100.0
	Total	42	100.0	100.0	

In Fez, more than 40% of the participants felt that the creation of the new tourist circuits primarily resulted in receiving more visits from tourists.

Table 7

7.1- Marrakech – Did the creation of new tourist circuits (guiding panels, interpretation and information panels) contribute to you:					
		Numbers	%	% Valid	Cumulative %
	Receiving more visits from tourists	19	45.2	45.2	100.0
	Having the possibility to explain your work	12	28.6	28.6	100.0
	Selling more products directly to tourists	13	31.0	31.0	100.0
	Increasing your income	13	31.0	31.0	100.0
	Total	42	100.0	100.0	

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In Marrakech, more than 45% of the participants felt that the creation of the new tourist circuits primarily resulted in receiving more visits from tourists.

Table 8

8-To what extent were you involved in the design and implementation of the “tourist circuit” activity?				
	Numbers	%	% Valid	Cumulative %
Not at all	23	54.8	54.8	100.0
I was interviewed	10	23.8	23.8	100.0
I was involved in the design	9	21.4	21.4	100.0
I was involved in the project implementation	5	11.9	11.9	100.0
Total	42	100.0	100.0	

55% of the beneficiaries state that they were not involved in the design and implementation of the new tourist circuits.

Table 9

9.1- Please indicate how the proposal (design) of the “tourist circuit” activity could have been improved.				
	Numbers	%	% Valid	Cumulative %
By explaining to us exactly what the activity was	38	90.5	90.5	100.0
By explaining to us what financial commitment it would require from us	15	35.7	35.7	100.0
By explaining to us what time commitment it would require from us	12	28.6	28.6	100.0
By involving us more in the choice of activities to develop	18	42.9	42.9	100.0

90% of the beneficiaries indicated that the tourist circuit activity could have been improved by explaining what exactly the activity was.

EFFECTIVENESS

Table 10

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

10- By what percentage did your sales change once the tourist circuits in the Medina had been (re)defined?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	-7	1	2.4	2.4	2.4
	-5	2	4.8	4.8	7.1
	-2	1	2.4	2.4	9.5
	0	12	28.6	28.6	38.1
	1	1	2.4	2.4	40.5
	2	1	2.4	2.4	42.9
	3	1	2.4	2.4	45.2
	5	7	16.7	16.7	61.9
	10	8	19.0	19.0	81.0
	15	1	2.4	2.4	83.3
	20	3	7.1	7.1	90.5
	23	1	2.4	2.4	92.9
	25	1	2.4	2.4	95.2
	30	1	2.4	2.4	97.6
	50	1	2.4	2.4	100.0
Total		42	100.0	100.0	

29% of the beneficiaries indicated that their sales had not changed following the redefinition of the tourist circuits in the Medina.

33% of the beneficiaries indicated that their sales had increased less than 10% following the redefinition of the tourist circuits in the medina.

16% of the beneficiaries indicated that their sales had increased more than 10% following the redefinition of the tourist circuits in the medina.

Table 11

11.1 - Have you noticed an improvement in the number of tourists since the new circuits were put in place?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	Yes, more national tourists	31	73.8	73.8	100.0
	Yes , more foreign tourists	39	92.9	92.9	100.0
	No, no national tourists	2	4.8	4.8	100.0
	No, no foreign tourists	2	4.8	4.8	100.0

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73% of the beneficiaries noticed an increase in the number of national tourists since the new tourist circuits were put in place.

93% of the beneficiaries noticed an increase in the number of international tourists since the new tourist circuits were put in place.

SUSTAINABILITY

Table 12

12.1- With the new tourist circuits, do you intend to:				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Modify the interior of your shop in order to better accommodate tourists?	26	61.9	61.9	100.0
Modify the front of your workshop/shop in order to make it more visible?	29	69.0	69.0	100.0

More than 60% of the beneficiaries indicate that since the new tourist circuits were put into place they intend to modify the interior of their boutiques to better accommodate tourists and to modify the exterior to make it more visible.

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AFM Evaluation: Beneficiary training sessions/awareness-raising for institutions and professionals (labels)

IDENTIFICATION

Table 1

Gender					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Male	11	68.8	68.8	68.8
	Female	5	31.3	31.3	100.0
	Total	16	100.0	100.0	

Table 2

Age					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	30	1	6.3	6.3	6.3
	32	1	6.3	6.3	12.5
	34	1	6.3	6.3	18.8
	35	2	12.5	12.5	31.3
	37	1	6.3	6.3	37.5
	38	2	12.5	12.5	50.0
	39	1	6.3	6.3	56.3
	42	1	6.3	6.3	62.5
	43	2	12.5	12.5	75.0
	49	2	12.5	12.5	87.5
	53	1	6.3	6.3	93.8
	54	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

Table 3

Level of education					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	No formal education	1	6.3	6.3	6.3
	Primary – not completed	1	6.3	6.3	12.5
	Primary – completed	1	6.3	6.3	18.8
	Secondary – not completed	4	25.0	25.0	43.8
	University – not completed	1	6.3	6.3	50.0

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	University – completed	4	25.0	25.0	75.0
	Professional qualification	2	12.5	12.5	87.5
	University – completed and Professional qualification	2	12.5	12.5	100.0
	Total	16	100.0	100.0	

Table 4

Professional identification – you are:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	SME	1	6.3	6.3	6.3
	Solo artisan	5	31.3	31.3	37.5
	Manager of a group, association, or collective	2	12.5	12.5	50.0
	Institutional: Ministry or Regional administration or House of Artisans	4	25.0	25.0	75.0
	Training center: EFP or CFA	4	25.0	25.0	100.0
	Total	16	100.0	100.0	

Table 5

5.1-You have participated in:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Auditor training	10	62.5	62.5	100.0
	Not concerned	6	37.5	37.5	37.5
	Training of trainers	10	62.5	62.5	100.0
	Awareness-raising sessions	13	81.3	81.3	100.0

RELEVANCE

Table 6

6.1- According to you, how will the national label for Moroccan artisans help the SMEs?					
		Numbers	%	% Valid	Cumulative %
Valid	Increasing of income	16	100.0	100.0	100.0

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Acquiring new local markets	10	62.5	62.5	100.0
Finding regular orders	8	50.0	50.0	100.0
Acquiring new skills in promoting their products	7	43.8	43.8	100.0
The ability to assert to their clients that their products are made in Morocco	11	68.8	68.8	100.0
It will have no effect on SME’s	1	6.3	6.3	100.0

100% of the beneficiaries feel that the label will in the first place allow the labeled SMEs to increase their income.

Table 7

7.1- According to you, how will the national label for Moroccan artisans help the solo artisans?					
	Numbers	%	% Valid	Cumulative %	
Increasing income	15	93.8	93.8	100.0	
Acquiring new international markets	11	68.8	68.8	100.0	
Acquiring new local markets	8	50.0	50.0	100.0	
Finding new regular orders	5	31.3	31.3	100.0	
Acquiring new skills in the promotion of their products	5	31.3	31.3	100.0	
The ability to attest to their clients that their products are made in Morocco	11	68.8	68.8	100.0	
It will have no effect on the solo-artisans	1	6.3	6.3	100.0	

93% of the beneficiaries feel that the label will in the first place allow the labeled solo artisans to increase their income.

Table 8

8.1- Please indicate if, according to you, the label will be more profitable for:				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Solo artisans	8	50.0	50.0	100.0
SMEs	13	81.3	81.3	100.0
Neither of the two categories	1	6.3	6.3	100.0
Total	16	100.0	100.0	

The beneficiaries feel that the labels will be more profitable for the SMEs than for the solo artisans.

EFFICIENCY

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

Table 9

9.1-To what extent did you participate in the implementation of the labeling activity?				
	Numbers	Percentage	Valid percentage	Cumulative percentage
Not at all	5	31.3	31.3	100.0
I was interviewed	7	43.8	43.8	100.0
I was involved in the design	3	18.8	18.8	100.0
I was involved in the project implementation	6	37.5	37.5	100.0

The survey revealed strong involvement of the beneficiaries in the training and awareness-raising, with 44% interviewed, 19% involved in the design, and 37% involved in the implementation of the project.

Table 10

10.1- Please indicate how the label activity proposal (design) could have been improved.				
	Numbers	Percentage	Valid percentage	Cumulative percentage
By explaining to us precisely what the activity consisted of	8	50.0	50.0	100.0
By explaining what financial commitment would be required of us	8	50.0	50.0	100.0
By explaining what time commitment would be required of us	4	25.0	25.0	100.0
By involving us more in the choice of the type of label (business, product, technique, complexity of label)	7	43.8	43.8	100.0
No response	6	37.5	37.5	100.0
Total	16	100.0	100.0	

50% of the beneficiaries of the training and awareness-raising felt that the label activity could have been improved by explaining precisely what the activity consisted of and what financial commitment it would represent for them.

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Table 11

11- On average, how long did it take you to get to the training venue?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Less than a half-hour	13	81.3	81.3	81.3
	Between 30mins.-1 hour	2	12.5	12.5	93.8
	More than 1 hour	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

More than 80% of the beneficiaries of the training and awareness-raising took less a half-hour to get to the training site.

Table 12

12- Did the length of travel time suit you?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Yes, it did not pose any major problems	15	93.8	93.8	93.8
	The length of the trip was decidedly to long	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

More than 93% of the beneficiaries of the training and awareness-raising felt that the length of the trip to the training site was convenient.

Table 13

13- To what extent did the training/awareness raising course times suit you?					
Regarding your family life:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	It was perfectly convenient	11	68.8	68.8	68.8
	It was fairly convenient	5	31.3	31.3	100.0
	Total	16	100.0	100.0	

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69% of the beneficiaries of the training and awareness-raising felt that the training session schedules worked well in regards to their family life.

Table 14

14- To what extent did the training/awareness raising course times suit you? Regarding your work activities:					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	It was perfectly convenient	11	68.8	68.8	68.8
	It was fairly convenient	4	25.0	25.0	93.8
	It wasn't very convenient	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

69% of the beneficiaries of the training and awareness-raising felt that the training session schedules worked well in regards to their professional life.

Table 18

18- 19. FOR THOSE WHO TOOK PART IN THE AWARENESS RAISING SESSIONS					
Please tell me to what extent you are satisfied with the labeling criteria?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
	Very satisfied	10	62.5	62.5	81.3
	Fairly satisfied	3	18.8	18.8	100.0

62% of participants who took part in the awareness raising sessions were satisfied with the labeling criteria.

Table 19

19-FOR THOSE WHO TOOK PART IN THE AWARENESS REAISING SESSIONS					
Please tell me to what extent you are satisfied with the labeling process?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	3	18.8	18.8	18.8
	Very satisfied	9	56.3	56.3	75.0
	Fairly satisfied	4	25.0	25.0	100.0
	Total	16	100.0	100.0	

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56% of participants who took part in the awareness raising sessions were satisfied with the labeling process.

Table 20

20- FOR THOSE WHO TOOK PART IN THE AWARENESS RAISING SESSIONS					
Please tell me to what extent you are satisfied with the labeling governance model?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	3	18.8	18.8	18.8
	Very satisfied	7	43.8	43.8	62.5
	Fairly satisfied	5	31.3	31.3	93.8
	No opinion	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

43% of participants who took part in the awareness raising sessions were satisfied with the labeling governance model.

Table 21

21- FOR THOSE WHO PARTICIPATED IN THE TRAINING FOR TRAINERS					
Please indicate whether you will be able to integrate this training in your usual training programs?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	37.5	37.5	37.5
	Yes	10	62.5	62.5	100.0
	Total	16	100.0	100.0	

All the participants in the training for trainers thought that they would be able to integrate the training into their usual training program.

Table 22

22-FOR THOSE WHO PARTICIPATED IN THE TRAINING FOR AUDITORS					
Please indicate to what extent you found the labeling criteria to be appropriate and suited to the context of Moroccan handicrafts?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	37.5	37.5	37.5
	Very satisfied	8	50.0	50.0	87.5
	Fairly satisfied	2	12.5	12.5	100.0

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	Total	16	100.0	100.0	
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62% of the participants in the training for auditors found the criteria to be appropriate and suited to the context of Moroccan handicrafts.

Table 23

23-FOR THOSE WHO PARTICIPATED IN THE TRAINING FOR AUDITORS					
Please indicate to what extent you found the labeling process to be appropriate and suited to the context of Moroccan handicrafts?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	37.5	37.5	37.5
	Very satisfied	9	56.3	56.3	93.8
	Fairly satisfied	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

62% of the participants in the training for auditors found the labeling process to be appropriate and suited to the context of Moroccan handicrafts.

Table 24

24- FOR THOSE WHO PARTICIPATED IN THE TRAINING FOR AUDITORS					
Please indicate to what extent you found the labeling governance model to be appropriate and suited to the context of Moroccan handicrafts?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Not concerned	6	37.5	37.5	37.5
	Very satisfied	8	50.0	50.0	87.5
	Fairly satisfied	2	12.5	12.5	100.0
	Total	16	100.0	100.0	

62% of the participants in the training for auditors found the labeling governance model to be appropriate and suited to the context of Moroccan handicrafts.

SUSTAINABILITY

Table 15

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15-What is the probability that the label will improve local sales of handicrafts after one year of its existence?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Definitely yes	10	62.5	62.5	62.5
	Fairly surely	5	31.3	31.3	93.8
	No opinion	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

More than 60% of the participants in the awareness-raising sessions found it probable that the label will improve local sales of handicrafts after one year of its existence.

Table 16

16- What is the probability that the label will improve export sales of handicrafts after one year of its existence?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Definitely yes	11	68.8	68.8	68.8
	Fairly surely	5	31.3	31.3	100.0
	Total	16	100.0	100.0	

69% of the participants in the awareness-raising sessions found it probable that the label will improve export sales of handicrafts after one year of its existence.

Table 17

17.1-How do you think that the clients of the artisans and SMEs will react to the introduction of the labeled products on the market?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	They will be reassured	16	100.0	100.0	100.0
	The will ask questions about the meaning of the label	11	68.8	68.8	100.0
	They will look for labeled products	11	68.8	68.8	100.0

All of the participants in the awareness-raising sessions thought that the label will reassure clients upon its introduction onto the market.

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Table 25

25-According to you, what percentage of the SMEs and artisans who have received the label will still be using it in their communication or on their products five years from now?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	20%	6	37.5	37.5	37.5
	40%	4	25.0	25.0	62.5
	60%	1	6.3	6.3	68.8
	80%	5	31.3	31.3	100.0
	Total	16	100.0	100.0	

37.5 % of the beneficiaries asked thought that only 20% of SMEs and solo artisans will still use the label in their communications or on their products after 5 years.

31% the beneficiaries asked thought that 80% of SMEs and solo artisans will still use the label in their communications or on their products after 5 years.

Table 26

26-What is the likelihood that the label will sustainably (for at least five years) improve the sale of handicraft products in Morocco?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Very high probability	5	31.3	31.3	31.3
	Relatively probable	6	37.5	37.5	68.8
	Fairly probable	4	25.0	25.0	93.8
	No opinion	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

94 % of beneficiaries felt that the label will sustainably (for at least five years) improve the sale of handicraft products in Morocco.

Table 27

27- What is the likelihood that the label will sustainably (for at least five years) improve the sale of handicraft products for export?					
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		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Very high probability	5	31.3	31.3	31.3
	Relatively probable	7	43.8	43.8	75.0
	Fairly probable	3	18.8	18.8	93.8
	No opinion	1	6.3	6.3	100.0
	Total	16	100.0	100.0	

94 % of beneficiaries felt that the label will sustainably (for at least five years) improve the sale of handicraft products for export. .

Table 28

28-When the label will have proven its worth (in five years), do you think that the artisans will be prepared to pay an annual fee in order to help co-finance the project?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Yes	6	37.5	37.5	37.5
	No	3	18.8	18.8	56.3
	I am not sure	7	43.8	43.8	100.0
	Total	16	100.0	100.0	

62 % of the beneficiaries did not think that the artisans will be prepared to pay an annual fee in order to help co-finance the project.

Table 29

29-When the label will have proven its worth (in five years), do you think that SMEs will be prepared to pay an annual fee in order to help co-finance the project?					
		Numbers	Percentage	Valid percentage	Cumulative percentage
Valid	Yes	8	50.0	50.0	50.0
	No	4	25.0	25.0	75.0
	I am not sure	4	25.0	25.0	100.0
	Total	16	100.0	100.0	

Final Evaluation of the “Artisan and Fez Medina” Project and the “Functional Literacy and Vocational Training” Activity - ME16 Lot 3

50% of the beneficiaries did not think that the SMEs will be prepared to pay an annual fee in order to help co-finance the project.

Annex 7: Artisan activity “focus group” reports

Identification
Evaluation of the subactivity: International promotion campaigns
Name of the focus group: International promotion campaigns
Date of FG, location: 07/24/2013, AM, Handicrafts Chamber
Moderator and observer: KHARBACHI Mostafa
Number of participants and gender division: 8 participants (M)
Criteria for selecting the focus group:
<i>We chose to bring the beneficiaries of the various international promotion campaigns together in one focus group since they share common issues in terms of the markets they exploit, no matter what their modus operandi is. Furthermore, these different tools will possibly allow to draw comparisons or see similarities which will be rich in lessons.</i>
Questions dealt with
<p>1. <i>[First, I would like to know how you heard about the opportunity of participating in this series of promotion campaigns: through the radio: through posters, on the internet, through contacts...?]:</i></p> <ul style="list-style-type: none"> - The participants learned about the opportunity to participate in the promotion campaigns abroad through the DRA and the CA in Fez.
<p>2. <i>[What happened then?]</i> :</p> <ul style="list-style-type: none"> - The beneficiaries took part in meetings where they were briefed on the goal of the promotion campaigns; - The beneficiaries joined the initiative because of its advantages and the benefits it may have on their commercial activity
<p>3. <i>[When you consider how the action went, what are the three aspects which worked really well and why?]:</i></p> <ul style="list-style-type: none"> - The organization of the promotion campaign was much appreciated by the beneficiaries; - The support materials were adequately suited to the promotion campaigns; - Contact with the partners in New York and Moscow was difficult: the beneficiaries had the feeling that the event was not very well publicized. That is why, according to them, there was no B to B in the classic sense of the term. The beneficiaries had to go and find clients themselves; - In spite of this, some contacts were made; and some beneficiaries have followed up; - Limited results for a first experience but the results are promising for the future: for some markets, for example the Russian market, the promotion campaign was more an awareness raising means for actors and buyers, for those who are not familiar with the Moroccan market; - The same goes for the South Korean market, where the tendency is more towards the

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sectors of technology and “modern” objects.
<p>4. [<i>And which three aspects really did not work (difficulties encountered) and why?</i>] :</p> <ul style="list-style-type: none"> - Publicity; - The logistics of getting the merchandise back; - For some, the placing of the Moroccan pavilion at the New York fair: it was very far away.
<p>5. [<i>What were the most important results for you?</i>] :</p> <ul style="list-style-type: none"> - For some, orders are being taken, especially in the leather sector, on the American market (New York, Atlanta) ; - Sales to individuals were conducted on site (Atlanta) ; - As for results in terms of contacts, there was general satisfaction; - Access to the Russian market was difficult, since you need to be accredited for commercial activity in addition to having a local partner.
<p>6. [<i>What actions have you undertaken in order to respond to the demand of this new market which you discovered?</i>]:</p> <ul style="list-style-type: none"> - Difficulties in the beginning to analyze the market, since it was unknown; - Following the recommendations of the specialist on the American market proved to be fruitless and inefficient since they were not adopted to client demands.
<p>7. [<i>What were the implications for your business?</i>]:</p> <ul style="list-style-type: none"> - Getting to know the American and Russian market, more or less; - Therefore it was important to find local partners to lean on in order to develop the commercial activity; - Investments were needed on these new (American and Russian) markets; - Repositioning of products with original and traditional design and appearance, specifically for the American market.
<p>8. [<i>Perspectives for you: Would you like to repeat the experience? Why (not)?</i>]:</p> <ul style="list-style-type: none"> - Participants were unanimously in favor of repeating the experience: <ul style="list-style-type: none"> o Unknown new markets; o A new analysis is needed taken into account what has been experienced, followed by a new strategy; o It is also necessary to have a specialized approach (wood, bronze, fabric or leather); - The experience was highly recommended.
<p>9. [<i>Lessons to be learned</i>]:</p> <ul style="list-style-type: none"> - Repeat this experience in other countries (Scandinavian, Arab, African); - Attend the same fair or exhibit several times; - Target specialized fairs; - But in place beneficiary selection criteria for each demonstration; - Review the B to B approach;

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<ul style="list-style-type: none"> - Invest in advertising and publicity; - Recommend the independent artisans to go to smaller fairs where direct sales are possible rather than to large exhibitions; - Design a website that can measure up to the event; - Design materials (a type of catalogue) in electronic form (CD) where all the exhibitors are presented; - Make sure that the experience is monitored and follow up on future clients and contacts made or identified.
<p>Positive points</p> <ul style="list-style-type: none"> - The organization of the promotion campaign in and of itself, which would not have been possible for the artisans at an individual level; - The diversity of the markets and destinations (American, Russian, Korean); - Getting to know certain markets which the artisans did not know before; - Analyzing the demand and being aware of a new strategy for sales (repositioning typical and traditionally Moroccan products to fit the American market) and for partnerships (looking for local partners, Russian market); in terms of approach (specialization by sector); - Awareness of the need to invest in markets that are still untouched (American and Russian).
<p>Negative points</p> <ul style="list-style-type: none"> - The organization of the B to B; - Lack of advertising at the venue and in the area where the event was taking place; - The technical support and accompanying on the target market.
<p>Points of contention</p>
<p>Nothing to report</p>
<p>Recommendations</p> <ul style="list-style-type: none"> - Define the advertising target group by relying on studies conducted by different firms and by Morocco’s economic and trade representations abroad on this topic; - Define the advertising approach and strategy; - Determine the advertising means depending on the needs of the event (fair, market and/or exhibition) - Select candidates who have commercial potential (SMEs for instance, if it’s for export) for similar events, always maintaining dialogue with the public and private actors and stakeholders who are involved in the handicrafts sector; - Ensure that there are awareness raising workshops on topics related to the market, to the type of event (special characteristics, market expectations and demands, quality, logistics, safety etc.); - Organize a promotion campaign that is targeted where the clients are active; - Repeat the experience on other markets; - Ensure the monitoring and the follow-up of the event.

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Participants		
Name	Organization / company	Contact details
Guernani Mohamed	L’art Du Bronze	06.61.19.50.81
Filali Alami Ouali	Assala Alami	06.61.35.68.58
Thaifa Mohamed	Touhafs Fès	06.61.14.86.33
Hazzaz Abdelletif	Dinanderie D’art	06.61.20.22.73
Lahsaini Nourddin	Art Assil	06.61.67.42.18
Alhassan Saou	Caf	06.61.83.51.18
Oudghiri	Sodaq	06.61.19.30.04
Khalid Benyassef	Belle Maroquin	06.61.25.04.30
Serghini Abdelilah	Amal Links	06.77.58.86.66

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Identification
Evaluation of the subactivity: National campaigns
Name of the focus group: National campaigns
Date of FG, location: 07/22/2013, AM, Handicrafts Chamber, Fez
Moderator and observer: KHARBACHI Mostafa
Number of participants and gender division: 10 participants, 5 of them women
Questions dealt with
<p>1. <i>[First, I would like to know how you heard about the opportunity of participating in this series of promotion campaigns?]:</i></p> <p>The participants heard about the promotion campaigns through the Handicrafts Chamber and the Regional Handicrafts Delegation.</p>
<p>2. <i>[What happened then?]:</i></p> <ul style="list-style-type: none"> - The main reason for participating was to become more well-known and in order to ensure sales as well as forging new relationships not only with colleagues but also with other partners, clients and providers; - The beneficiaries had the opportunity to participate in information meetings on the campaigns, however, they did still not gain clarity or detailed explanations on the program or the activities which were part of it; - Even if the participants did not have the opportunity to contribute to the design of the program and to its contents, they feel that the objectives which were set in the meetings were respected and achieved.
<p>3. <i>[When you consider how the action went, what are the three aspects which worked really well and why?]:</i></p> <ul style="list-style-type: none"> - The overall organization (the event itself, getting there, the stands, etc.) was very satisfying; - The results in terms of contacts (partners, providers, clients) and sales was satisfying; - The beneficiaries developed social skills (forging relationships, openness, communication, etc.) and professional knowledge which they will be able to exploit in future in their professional relationships and their profession.
<p>4. <i>[And which three aspects really did not work (difficulties encountered) and why?]:</i></p> <ul style="list-style-type: none"> - The 4th edition was organized very hastily because: <ul style="list-style-type: none"> o The large number of exhibitors who, so they said, did not make it easy for the clients and visitors to see all the stands and products); o A mixing of specialties and sectors (exhibitors presenting products related to various sectors: wood, bronze, woven products etc.); o The organization of the parade (4th edition) by one of the exhibitors was only moderately appreciated by most women taking part; o The reception by the hosts and the security guards was not at all appreciated by the participants; o The stationing and the exhibition space were badly positioned (4th edition), which

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<ul style="list-style-type: none">had an impact on the organization of transport which was available;o Lack of product manufacturing demonstrations (embroidery, bronze, weaving etc.) for the visitors.- According to the beneficiaries, out of all the exhibitions, the 3rd edition was the most appreciated in terms of the organization and client “acquisition”;- As for the promotion means: the 4th edition lacked written material (the organizers settled for CDs which the exhibitors felt were not adequate or practical and cannot be used by the visitors then and there);- The participants felt that three days was too short since they said that it did not allow them to establish contact with potential clients and partners;- Moving the dates of the exhibitions had an impact on the beneficiaries’ organization in terms of planning their production and their business time upstream and downstream;- The 4th edition was organized very hastily due to the closing deadlines of the project activities;- The opening hours of the exhibition were very long for most of the participants (from 10am to 10pm which was extended until 1am by the parade).
<p>5. [<i>What were the most important results for you in terms of orders?</i>]:</p> <p>In addition to profits made during the exhibitions by most of the participants, in terms of orders, sales, contacts with potential clients and providers, positive effects are visible and were recorded, namely:</p> <ul style="list-style-type: none">- Getting to know other colleagues and actors in the professions and implementers in the sector;- Getting to know market trends and innovations introduced into certain sectors;- Developing social skills which are necessary to develop business (relationships, openness, contacts etc.);- Developing professional know-how: new products, raw materials, innovation.
<p>6. [<i>Perspectives: Would you like to repeat the experience?</i>]:</p> <p>If it had to be redone, the participants were unanimously in favor of repeating the experience as long as the returns on investments both personal and professional in nature were definite.</p>
<p>7. [<i>Lessons to be learned</i>]:</p> <ul style="list-style-type: none">- Ensure good media coverage (TV, radio, press, social networks);- Allow the artisans to participate in the design and the definition of the content of the promotion campaigns;- Conduct a rigorous selection of exhibitors whose profiles need to meet high requirements;- Ensure that the placement and organization periods correspond to the professions and the sectors, same for the length of the exhibitions (according to the participants’ requests they should last between 8 and 10 days) and for the hours;- Ensure that the exhibitors are welcomed (hosts and security guards);- Design material on paper (catalogues and leaflets) instead of electronic material

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<p>(CDs);</p> <ul style="list-style-type: none"> - Limit the number of exhibitors in order to guarantee better visibility of the stands and ensure that they are visited by clients and visitors; - Make sure that the set-up favors visibility and quick access to the stands (in these editions some of the additional stores were not visible, which was very taxing); - Have a brand and a label in order to participate in the exhibitions; - Allow other cities to benefit (especially large cities) and not only limit it to Fez and Marrakech, which would allow more openness towards other partners and clients; - Finally, examine the possibility of allowing some people to attend exhibitions abroad.
<p>Positive points</p> <ul style="list-style-type: none"> - All in all, the organization of the promotion campaigns and the exhibitions were well appreciated; - The results in terms of contacts (partners, providers, clients) and sales was satisfactory; - The beneficiaries developed social skills (establishing relationships, openness, communication etc.) and professional know-how which they will be able to use in the future in their professional relations and in their business; - Most beneficiaries considered the experience to be unique and relevant to the artisan profession and to the sectors relating to it.
<p>Negative points</p> <ul style="list-style-type: none"> - Lack of media promotion of the events (exhibitions); - The organization and the carrying out of the parade was only moderately appreciated; - Changing the dates had an impact on the beneficiaries’ levels of preparedness; - All participants felt that the 4th edition was organized very hastily; - The length of the exhibitions in terms of hours.
<p>Points of contention</p> <ul style="list-style-type: none"> - Although the organization of the parade was only moderately appreciated, it is true that this parade was a point of friction and contention between the participants in terms of the quality of its organization (the organizing exhibitor, the time, the length etc.); - The logistics, specifically the joint transportation they were provided with caused disagreement between the beneficiaries, because they had different expectations.
<p>Recommendations</p> <ul style="list-style-type: none"> Ensure good media coverage (TV, radio, press, social networks); Allow the artisans to participate in the design and definition of the content of the promotion campaigns; Select the exhibitors rigorously; Ensure that the organization periods, the length of the exhibition (8 to 10 days) and the times are adequate; Design paper materials (catalogues and flyers); Limit the number of exhibitors in order to provide better visibility for the stands and

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<p>in order to guarantee they are visited by clients and visitors; Make sure that the set-up favors visibility and quick access to the stands.</p>		
Participants		
Name	Organization / company	Contact details
Hachchame Fatima	Assil Couture	06.61.25.50.36
Maher Atika	El Assala Cooperative	06.63.68.06.27
El Yahyaoui Yahya	Traditional Weaving	06.61.36.24.47
Kamal Mozour	Milwesel	06.14.78.10.07
Elghazi Abbassi Mohamed	Weaver	06.67.36.52.41
Rteb Abdelkader	Potter	06.61.25.58.59
Youness Elmoubtahij	Handicrafts Chamber Fez	06.61.80.40.75
Khadija Zouai	Tapis Cooperative	06.60.45.44.52
Ghorfi Meryem	Traditional Sewing	06.61.26.63.43
Rachida Chihab	Ceramics	06.61.30.37.77
Mohamed Touimi	Leather products	06.56.35.34.55
Identification		
Evaluation of the subactivity: Tourist circuits		
Name of the focus group: Tourist circuits		
Date of FG, location: 07/24/2013, Handicrafts Chamber (AM)		
Moderator and observer: KHARBACHI Mostafa		
Number of participants and gender division: 8 participants, one of them a woman and one of them a member of staff at the Handicrafts Chamber		
Criteria for selecting the focus group:		
<i>We decided to invite all heads of associations, tourism professionals and representatives of local authorities in order to gather their opinions on the interests of their members / clients/ constituents, respectively.</i>		
Questions dealt with		
<p>1. <i>[First, I would like to know how you heard about the redefinition of the tourist circuits?]:</i> The participants heard about the redefinition of the tourist circuits through the Regional Crafts Delegation (DRA) and the Handicrafts Chamber (CA).</p>		
<p>2. <i>[What happened then?]:</i></p> <ul style="list-style-type: none"> - Participation in several dialogue meetings to define the objectives with the heads of the DRA, the local authorities and the consulting firm in charge of the tourist circuits. - Two phases were defined: (i) a study of the circuits, (ii) and an implementation phase. 		

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<p>3. <i>[How did you react to the redefinition of the tourist circuits and why...?]</i>:</p> <ul style="list-style-type: none">- The placing of signs was at the center of the artisans ‘ preoccupations;- For the professionals working in tourist institutions, the idea was to turn the handicrafts sector and its products into the focus of tourist circuits in order to increase the visibility of the spaces and the sectors. For this, diagnoses were carried out, first on the basis of what already existed with the artisans and the associated actors;- Certain artisans feel that they were not involved by the local authorities.
<p>4. <i>[What were the results for you or for your members?]</i></p> <ul style="list-style-type: none">- The results achieved were differently perceived by the beneficiaries;- Those who were included in the tourist circuits feel that they did not reap the benefits because of the change in placing of the signs and panels or because of the definition of the circuits and the content of the panels that sometimes mixed up the professions and the sectors (such as embroidery and weaving);- Those who were excluded from the circuits do not understand the choice in circuits.- As for the guides, according to some participants, they were resistant to the signs from the start as well as to their content which seemed exhaustive and detailed, which for them meant that the tourists would use the guides less;- For now, it is premature to evaluate the impact of the circuits.
<p>5. <i>[Do you think that in the end these circuits will have an important impact on what makes the Fez Medina special, namely the traditional handicrafts?]</i>:</p> <p>The influence of the tourist circuits on the Medina of Fez and consequently on the traditional handicrafts sector will be effective for the following reasons:</p> <ul style="list-style-type: none">- The results of the reorganization and the redefinition of the circuits;- The extension of the visits to the circuits: more tourists are brought in and their time spent on the circuits is optimized, which can only be beneficial for the artisans;- The marginalization of the fake guides or a reduction of their operability;- The rekindling of certain traditional handicrafts professions which are disappearing and which the tourist circuits will include in their tour path.
<p>6. <i>[Do you think that the circuits will bring in more tourists?]</i>:</p> <ul style="list-style-type: none">- The participants are convinced that the flow of national and international tourists will improve with time.
<p>7. <i>[Have you changed your initial position towards this activity? How and why? Do you think that the circuits will support the development of new activities?]</i>:</p> <ul style="list-style-type: none">- The circuit paths will create commercial activities for both the inhabitants and the merchants;- The restoration of the fondouks, the upcoming development of service structures (such as

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resting areas), additional projects which are still being designed and the realization of which will consolidate the tourist circuits and the commercial and economic activities of the tourist paths.
<p>8. [<i>Perspectives for your clients, your members, your constituents?</i>]:</p> <ul style="list-style-type: none"> - Once the circuits have been valued and promoted by the actors concerned, they will certainly draw crowds; - Development of professions and products in terms of innovation and quality in order for the artisans and tour operators to better profit from the tourist circuits.
<p>9. [<i>Lessons to be learned?</i>]:</p> <ul style="list-style-type: none"> - Accompanying the implementation of the circuits with a promotion campaign with the foreign tour operators, travel agencies in Morocco, with the guides and associated actors in the sector; - Use the circuits in order to organize festive events for each sector according to a specific calendar, as used to be done before; - Raise awareness among the professional corps and the sectors on the importance of the circuits; - Produce materials and catalogues placing emphasis on the circuits and make them available to tourists at the airports, hotels, travel agencies and guest houses; - Produce a specific purchasing guide for each profession and sector located on the tourist circuits; - Ensure that the signs are protected through a green number; - And finally, review the positioning of certain signs and their contents.
Positive points
<ul style="list-style-type: none"> - The fact that all actors were aware of the importance of the tourist circuits; - The fact that the beneficiaries supported the project to redefine the circuits in spite of the fact that some of them were not located close to the circuits; - The promotion and the popularization of the sectors for the tourists due to the signs and panels dedicate to them; - The development of future projects (fondouks, rest areas...) will consolidate the tourist circuits and will make them more attractive; - Integrating endangered professions into the tourist circuits.
Negative points
<ul style="list-style-type: none"> - Difficulties of including most of the sectors; - A lack of regular promotion of the sectors; - Some errors in certain panels and signs (embroidery ≠ weaving);
Points of contention
<ul style="list-style-type: none"> - Discontent among certain artisans who were excluded from the tourist circuits

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Recommendations
<ul style="list-style-type: none"> - Conducting information campaigns and regular promotion campaigns for national tourists on the one hand and for international tourists through relay points on the other hand (tour operators, travel agencies, hotel structures, tourist information centers...); - Carry out an impact assessment of the tourist circuits with the artisans, merchants and inhabitants by the affected actors (Tourism, Culture, Crafts) in order to improve and/or consolidate the achieved results; - Include the circuits into all tourist promotion materials (guides, catalogues, brochures) and at all travel related places (airports, trains, buses); - Raise awareness among the independent artisans or even among the handicrafts SMIs/SMEs in order to create promotional material, especially for the independent artisans (business cards, flyers, brochures) and to include the tourist circuits in them; - Include the tourist circuits on the internet sites of institutional and private operators with the specificities of the handicrafts sectors; - Organize occasional topical demonstrations and activities for one of the sectors featured along the tourist circuit paths.

PARTICIPANTS

Identification		
Evaluation of the subactivity: TOURIST CIRCUITS		
Name of the focus group: FG TOURIST CIRCUITS		
Date FG, location: 03/24/2013 PM, Handicrafts Chamber, FEZ		
Moderator: KHARBACHI MOSTAFA		
Name	Organization / company	Contact details (telephone)
MOHAMED BENKIRANE	LOCAL Maison de l'Artisan	0662.45.44.38
MOHAMMED GUERNANI	ART DU BRONZE	0661.19.50.81
MOHAMMED BOUGUEDMACH	WEAVING	0661.16.72.62
BOUSELKHANE ADIL	WEAVING	0662.41.74.38

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ABDELMALEK TAZI	C.R.T	0535.60.97.52
SAOU ALHASSAN	C A F	0661.83.51.18
ABDLAH FARIH	DIRAZA	0664.88.26.11
ALI IDRISSE	DIRAZA	0668.86.49.36
SAADIA BOUZAR	DR TOURISME FES	0661.82.13.01

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Identification	
Evaluation of the subactivity: <i>National Label</i>	
Name of the focus group: <i>National Label</i>	
Date of FG, location: <i>07/23/2013 Artisan House (AM)</i>	
Moderator and observer: <i>KHARBACHI Mostafa</i>	
Number of participants and gender division: <i>8 participants, three of them women</i>	
Criteria for selecting the focus group: <i>We decided to bring together in one focus group the institutional stakeholders, trainers and applicant companies who benefited either from a training sessions or from specific support for the label, in order to assess what joint or divergent views each of them had compared to the others</i>	
Questions dealt with	
<i>1</i>	<i>[First I would like to know how you heard about the idea to launch a labeling scheme for Moroccan artisans...]:</i> The participants learned about the labeling project through the Regional Handicrafts Office and the Handicrafts Chamber.
<i>2</i>	<i>[I would like to know how and why you took part in the design of the labeling program]</i> The participants did not take part in the design, nor in the definition of the label, nor in technical approaches to labeling.
<i>3</i>	<i>[Have you adopted the lessons learned during the training sessions or during the support you received?]</i> The beneficiaries only participated in the awareness and information sessions surrounding the following topics: What is the label? Why the label? Labeling conditions? Advantages that go with it? Aims?
<i>4</i>	<i>[I would like you to help me understand why the SMEs and independent artisans will decide to apply for the national label?]</i> <ul style="list-style-type: none"> - <i>Protection for the artisan and his company;</i> - <i>The label will allow the development of products and will improve their quality;</i> - <i>The label is a lever and an instrument serving creativity as well as a motivation for permanent and regular efforts;</i> - <i>Protection of the Moroccan artisans’ rights when faced with foreign artisans;</i>

- *Protection of the product from imitations;*
- *Thanks to the product brand, the product becomes part of a continuous logic of quality improvement;*
- *The label allows to differentiate between one’s own products and competing products;*
- *Close the road to intruders, non-professionals and people with other sources of income (« Ktaa trek ala almutatafilines (dakhiline) a la sanaa (mul chakkara »).*

5 [What will make the label successful?]:

The label’s success will require the following measures and levers to be put in place:

- Conditions and requirements (muwasafat) which the artisans will have to fulfil;
- Monitoring the conditions and specificities of the label;
- Establishing a monitoring and inspection committee to supervise the conditions and specificities and to ensure that they are respected. This will give the label and the professionalization of the sector more credibility;
- Organizing publicity actions to reach the greater public and experts to raise awareness about the importance and the aims of the labeling.

6 [What are the main factors that could harm the label? ...]:

- The use of raw materials that are not in line with the product standards and quality;
- Unqualified workers;
- The label being given to people who do not deserve it (“bak sahib”: clientelism);
- The absence or lack of rigor in the inspections.

7 [How will the introduction of the label change the professional lives of the artisans or SMEs?]:

It will allow:

- The artisan to be more self-confident;
- There to be more trust in Moroccan products;
- There to be a product guarantee;
- To achieve more loyalty from the client;
- The artisans to be recognized in guide books for national and international tourists;

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	<ul style="list-style-type: none"> - To gain the trust of foreign clients.
8	<p>[<i>What are the perspectives for the ‘labelled’ independent artisans or SMEs?</i>]:</p> <ul style="list-style-type: none"> - In the end, the labeling remains dependent on the personal conviction held by the artisan and his will to make the label sustainable; - Those artisans will support the label and wish to make it sustainable if there are strict inspections before and after the labeling process; - Implementing a label system and the co-financing of such a system will require promotional activities which will also be a model to persuade other artisans and to motivate them to support the labeling system; - Along the same lines, there need to be advertising campaigns for the label carried out by affected organizations and institutions in order to entrench the concept in the area of handicrafts; - The labelled artisans will need to benefit from promotion activities in order to draw in others and to make others want to join; - Finally, there should be an association of labelled artisans who share the same brand.
9	<p>[<i>Did you appreciate the label promotion campaign which is currently ongoing?</i>]:</p> <p>The campaign is ongoing. Additional efforts are needed in terms of means and content (large numbers of advertising panels placed in strategic areas, TV, radio...)</p>
10	<p>[<i>What will ensure the long duration of the label?</i>]:</p> <p>The label’s sustainability will require:</p> <ul style="list-style-type: none"> - Involving the affected institutions and ministries (Crafts, Tourism, Culture...); - Involving the labelled artisans and companies (“al yad fi al yad li binaa al ghad”: “hand in hand to construct the future”), and all the actors and public and private implementing parties; - As for financial autonomy, the beneficiaries feel that it is too early to talk about that. One will have to wait until the label has been put in place.
11	<p>[<i>Lessons the be learned</i>]:</p> <ul style="list-style-type: none"> - Respect the conditions and requirements of the label; - Create a committee tasked with examining the applications; - Create an oversight committee together with the ministries in charge of the handicrafts sector; - Put in place a system of inspections and sanctions;

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<ul style="list-style-type: none"> - Raise awareness among the artisans and train them on the label, on the advantages and returns on investment that labeling entails; - Conduct a pilot/model experience in order to raise awareness about the labeling concept and to then make it tangible.
<p>Positive points</p>
<ul style="list-style-type: none"> - Awareness about the importance of the label; - Support of such a project which can lead to profits and guarantees for the product, the artisan and the company; - Organization of the handicrafts market; - Fight against imitation; - Promoting handicrafts.
<p>Negative points</p>
<ul style="list-style-type: none"> - Lack of involvement of professionals in the sector; - Fears that there will be a lack of inspections and rigor; - Promotion campaigns for the label were too tame.
<p>Points of contention</p>
<ul style="list-style-type: none"> - Nothing to report
<p>Recommendations</p>
<ul style="list-style-type: none"> - Ensure good media coverage (TV, radio, press, social networks) in order to promote the spirit and the concept of the label as well as its advantages for the product, the artisan, and for the Moroccan handicrafts sector in general; - Involve the artisans and associated actors in the crafts and other areas: specifically tourism and culture, in the design and definition of the label content; - Put in place a nomenclature of the sectors in order to organize and increase the visibility of the products that go with it; - Put in place rigorous selection criteria for applicants who wish their product to be labeled; - Set up and <i>ad hoc</i> committee with all handicrafts professionals and other stakeholders (tourism, culture, vocational training) in the handicrafts area; - Organize awareness raising seminars on product and service quality in the area of handicrafts; - Raise awareness among the independent artisans and the SMIs/SMEs about the professionalization and qualification (training) of the handicrafts workforce.

PARTICIPANTS

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Identification		
Evaluation of the subactivity: NATIONAL LABEL		
Name of the focus group: FG NATIONAL LABEL		
Date of FG, location: 07/23/13 PM, Handicrafts Chamber, FEZ		
Moderator: KHARBACHI MOSTAFA		
Name	Organization / company	Contact details (telephone)
MAHER ATIKA	ELASSALA Cooperative	0663.68.06.27
HALIMA DIYAMI	WEAVERS Cooperative	0674.54.08.85
KHADIJA RAFOUA	WEAVERS Cooperative	0606.73.00.56
SERGHINI ABDELILAH	AMAL LINKS	0677.58.86.66
TOMZIT MERYEM	C.A.T	0535.65.17.58
HADADI ALI	FERRONERIE D’ART	0668.47.86.65
ALAMI	Society of Traditional Handicrafts in Morocco	0661.35.68.58
KHALID DGUIQUI	C.A.F	0645.35.00.43
BENSAID LOTFI	MEDITERANEEN SERVICES	0661.26.16.60
IDRISSI SERGHINI MOHAMMED	POTTERY	0670.72.60.44

Identification
Evaluation of the subactivity: Acquiring gas kilns
Name of the focus group: Acquiring gas kilns
Date of FG, location: 07/22/2013, Handicrafts Chamber, (AM)
Moderator and observer: KHARBACHI Mostafa
Number of participants and gender division: 6 participants (M)
Criteria for selecting the focus group: <i>We chose to bring the potters who acquired gas kilns together in order to learn joint lessons about installing these new kilns and in order to see what implications this acquisition had for them.</i>
Questions deal with
1. <i>[First, I would like to know how you heard about the opportunity of participating in this project.]:</i> - It was processed together with the handicrafts associations who acted as middlemen between the artisans and the consulting firm for acquiring the gas

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<p>kilns and participating in the experience of using them.</p>
<p>2. [What happened after that? Did you apply to be selected, did you take part in an information meeting...?]</p> <ul style="list-style-type: none"> - The goals and objectives were clear but putting them into practice on the ground caused some problems: using the kilns for production purposes turned out to be technically challenging.
<p>3. [Why did you decide to purchase a kiln?]</p> <ul style="list-style-type: none"> - The buyers were not very enthusiastic about purchasing and using the kiln (they participated in the experiment in order to show good will and in order to not be seen as blocking the project (“<i>hat al beda ftas!</i>”, “being a wrench in the works!”).
<p>4. [Alternative solution: Why was the solution to replace the kilns with local gas kilns not applied]:</p> <ul style="list-style-type: none"> - The kilns with which the firing techniques were demonstrated (Spanish kilns) did not correspond to those which were delivered through CIDE, both in terms of price (more or less 480 000 instead of 280 000) and in terms of production quantity, quality and aesthetics, which led to a great sense of disappointment (“<i>al ihbat!</i>”, “<i>what a disappointment!</i>”), and to the feeling that the program / project was inadequate to meet the needs of the profession; - The fact that the gas kiln buyers did not opt for the local kilns has to do with the fact that these kilns are not in line with international standards. Therefore, they could not be accredited, although the participants did say that the local kilns met their safety needs as well as the material requirements and the very important issue of costs (5 butanes instead of 10 for the Spanish kilns); expectations that the Spanish kilns were unable to meet. - - The possibility of the local kilns producing 50% Beldi (traditional)
<p>5. [What do you think of the financial set-up that was put in place to help you purchase the kiln?]:</p> <ul style="list-style-type: none"> - The financial set-up (20/80) was appreciated by the participants, however, the kilns which were delivered did not correspond to the planned cost, which led to a certain level of suspicion towards the experience as a whole.
<p>6. [How did the putting in place of the kiln work?]:</p> <ul style="list-style-type: none"> - Those buyers who have used gas kilns (2 out of 6) emphasized the technical

<p>difficulties of getting the kiln to run. For example: the loss of 2 batches of zellij at an estimated cost of 12,000;</p> <ul style="list-style-type: none"> - The high cost of raw materials; - The need to have a technician permanently present in order to maintain the kiln.
<p>7. [What are the main advantages and disadvantages of the kiln?]</p> <ul style="list-style-type: none"> - Advantages : <ul style="list-style-type: none"> o The only advantage mentioned was the quality. - Disadvantages: <ul style="list-style-type: none"> o The time of firing: 10h; o The increased electricity consumption which even continues after firing: the ventilation requires electricity; o Increased consumption of gas; o Production capacity (3500 instead of 8000); o Safety: the large amount of butane that needs to be used by all potters; o Maintenance, which requires an additional employee.
<p>8. [What has changed in your life since you took part in this project?]</p> <ul style="list-style-type: none"> o Intensity of the work load (from 5am to 7pm), which has an impact on the family and social life (too much work); o No added value professionally; o No benefits or gains.
<p>9. [Lessons to be learned]:</p> <ul style="list-style-type: none"> - Ensure that there is coherence between the experiments carried out and the kilns which are delivered in order to ensure that the buyers applying for these sorts of programs support it; - Suggest a list of different kiln brands presenting the different characteristics and advantages and disadvantages so that the buyers can chose calmly and responsibly - Propose different kiln companies/manufacturers as options
<p>Positive points</p> <ul style="list-style-type: none"> - Support for the project in spite of reluctance; - The quality of the <i>in fine</i> product.
<p>Negative points</p>

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<ul style="list-style-type: none"> - The actual experience was not in line with the demonstrations and experiments; - Lack of involvement of the buyers in choosing the kilns; - The low number of buyers who actually use it (2); which does not give the experience the necessary credibility; - Safety with regard to the amount of butane that needs to be used; - Traditional firing is still being carried out which has an environmental impact; - Acquisition of the gas kilns mainly by senior potters
Points of contention
Nothing to report
Recommendations
<ul style="list-style-type: none"> - Involve the applicants in the choice of kiln brand and manufacturer; - Support the buyers in purchasing raw materials; - Provide technical support for the buyers over a “long period of time” (even after the acquisition); - Show the material benefits and gains that can come from using non-traditional kilns; - Put in place a tutoring and buddying system after the kilns have been bought and while they are being used.

PARTICIPANTS

Identification		
Evaluation of the subactivity: Production		
Name of the focus group: FG KILN ACQUISITION		
Date of FG, location: 07/22/2013, PM, Handicrafts Chamber, FEZ		
Moderator : KHARBACHI MOSTAFA		
Name	Organization / company	Contact details (telephone)
MALIH MOHAMED	SHOP	0670.86.71.54
MOHAMED ZEMMOURI	SHOP	0624.82.11.77
DRKI DRISS	SHOP	0661.71.92.99
HAJ ABDENNEBI	SHOP	0666.36.51.41
MOHAMED THAIFA		0661.14.86.33
L’GUABID IDRISSE ABDESLAM	SHOP	0672.03.12.76

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Identification
Evaluation of the subactivity: Potters who did not acquire the gas kilns
Name of the focus group: Potters who did not acquire the gas kilns
Date of FG, location: 07/23/2013, AM, Handicrafts Chamber, Fez
Moderator and observer: KHARBACHI Mostafa
Number of participants and gender division: 11 participants (M)
Criteria for selecting the focus group: Potters who took part in the training sessions / Potters who had a financing agreement
Questions dealt with
<p>1. <i>[First, I would like to know how you heard about the opportunity of participating in project]:</i></p> <p>The participants learned about the project through the Regional Handicrafts Delegation and through the CIDE consulting firm, as well as through the Fassia Association and the Potters’ Solidarity Association.</p>
<p>2. <i>[What happens then? Did you apply to be selected, did you take part in an information meeting...?]:</i></p> <ul style="list-style-type: none"> - The meetings took place with the associations and during these meetings the objectives were presented and clarified; - The objectives which were defined were implemented on the ground.
<p>3. <i>[Why did you decide to join the project?]:</i></p> <ul style="list-style-type: none"> - The participants had not before had the opportunity to attend training courses on their profession; - The training modules were attractive (design, marketing, hygiene and safety, respecting the environment...); - The training sessions were an opportunity to leave behind the old-fashioned ways of working and to improve the products in terms of new design; - As for a return on investments, the participants are aware that they have not applied what they have learned, so they have not become active. The reasons for this are a lack in the necessary materials and techniques in order to put into practice the lessons they have learned.
<p>4. <i>[Which aspects really did not work and why?]:</i></p> <ul style="list-style-type: none"> - The quality of the training sessions (content, methods and logistics); - The participants did not decide to purchase a gas kiln because the kilns were too expensive; - Disadvantages noted regarding the Turkish kilns (complicated technology) and the Spanish kilns (simple and accessible technology but very expensive).

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<p>5. [<i>Why didn't you purchase a kiln?</i>]: The participants decided not to buy a kiln because they were too expensive.</p>
<p>6. [<i>Alternative solution: Why was the solution to replace the kilns with local gas kilns not applied?</i>]:</p> <ul style="list-style-type: none"> - The simple and easy usage of the local atmospheric kilns; - The accessible acquisition cost; - The cost of the workforce is the same as for the imported kilns, except for the cost of the maintenance technician (Imported kiln).
<p>7. [<i>Have you adopted the lessons from the training sessions? Which ones? Why, and why not the others?</i>]:</p> <ul style="list-style-type: none"> - The lessons learned during the training sessions were not applied because of the means that needed to be mobilized; <p><u>Emotions expressed:</u> <i>“Exorcized” after seeing the gas kiln demonstrations: dah ʃ *a katzu**l (“the fear is gone!”), lhajiz tgalaa ! (“the barrier is broken!”), bhal ku**na kanqarbu** lwah ʃ * wa lqinah gaa ma kaj*** aad (“it’s like approaching a monster and then discovering that it does not bite!”). This was expressed in comparison to what they had been told by the big potters (the seniors) about the kilns (something to be afraid of!).</i></p> <p>*ʃ : <i>ch</i> In the International Phonetic Alphabet for French (API) **u: <i>Ou</i> In the International Phonetic Alphabet for French (API) ***J: <i>Y</i> In the International Phonetic Alphabet for French (API)</p>
<p>8. [<i>What has changed in your life since you took part in this project?</i>]</p> <ul style="list-style-type: none"> - Having learned about gas kilns on a professional level, as well as about clay and its regional specificities (Fez), about mixing colors, about commercialization techniques... - At the family level, the training sessions took place from 6pm to 9pm which caused some discontent among the wives; - At the social level, a positive impact was felt: communication with the other colleagues and competitors, openness towards colleagues who used to be perceived as mean and confrontational people; - Through being together for training sessions, some of the beneficiaries got to know the associations who represent them which allowed the associations to win new members and to take on more responsibility; - In terms of income, the training sessions did not lead to any material gains in practical terms.
<p>9. [<i>Lessons to be learned:</i>]</p>

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- Ensure that the beneficiaries’ training sessions are more practical and less theoretical;
- Ensure that the participants are motivated to attend regularly through reimbursement and compensation for the hours spent attending training sessions;
- Ensure that the participants can benefit from the tools and materials with which they trained;
- Expand the content of the training sessions to points such as:
 - o Throwing;
 - o Molding and running,
 - o Info graphics.
- Introduce the beneficiaries to modern computer-based designing;
- Organize the training sessions during the time between October and February;
- Select the training candidates through the heads of the DRA and the CA together with the pottery associations in order to identify real beneficiaries;
- Ensure that the participants from the sector can benefit from study sessions in countries with similar activities (Italy, France) in order to learn about innovative practices and new production techniques;
- In order to improve the firing capacities, the training sessions should address practical aspects linked to production;
- Encourage the potters to carry out innovative business projects in order to develop competitiveness based on high quality products;
- Support the potters through programs to facilitate access to credit (for example, the Moukawalati program: My Company) in order to create companies in order to maintain the profession and the quality of the products
- Train the beneficiaries on the choice of raw materials and related techniques for high quality productions.

Positive points

- Support for the project;
- The will expressed to purchase gas kilns;
- Demystifying the production tool: new knowledge on the gas kilns (Turkish and Spanish);
- Training sessions as a lever for developing technical and social skills;
- Openness towards production techniques (design, raw materials...) and towards the possibility of improving the quality and the ways of doing things;

Negative points

- Access to purchasing gas kilns;
- Practical transfer of knowledge acquired.

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Points of contention
Recommendations
<ul style="list-style-type: none"> - Within another support project, a different formula should be found to finance the gas kilns (group purchase), or associations in form of a grouping of shared economic interest (GIE); or cooperatives; - Show the material benefits and gains to be had from using non-traditional kilns; - Involve the applicants who want to purchase kilns in the choice of brand and manufacturer; - Ensure technical support for the buyers over a “long period of time” (post-acquisition support); - Implement a tutoring and buddying system after the acquisition and throughout the use of the chosen kilns; - Create an atmosphere of understanding and cooperation between the older and the younger potters; - Base the training sessions and the skill development on priority needs; - Develop practical training sessions which can be applied in the short term; - Create opportunities to celebrate events surrounding the pottery professions: for example a trophy for the most innovative potter.

PARTICIPANTS

Identification		
Evaluation of the subactivity: PRODUCTION		
Name of the focus group: FG POTTERS WHO DID NOT ACQUIRE KILNS		
Date of FG, location: 07/23/13, AM, Handicrafts Chamber, FEZ		
Moderator: KHARBACHI MOSTAFA		
Name	Organization / company	Contact details (telephone)
AZIZ CHARBAK	BEN JALIK. ASSOCIATION.FEZ	0671.85.85.78
JAMATI IDRISSE ABDELHAI	BEN JALIK.ZELIJE ASSOCIATION	0661.56.32.53
MOHAMED EL HARONI	.BEN JALIK.TADAMOUN	0601.11.46.04

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	ASSOCIATION	
EL MOHTADI HASSANE	FASSI ASSOCIATION	0666.42.22.82
ABDESSAMAD HABIBI	FASSI ASSOCIATION	0634.21.70.17
ABDELILAH EL KOUNTI	FEZ.CERAMICS ASSOCIATION / FASSI DE POTTERY AND ZELIJ ASSOCIATION	0653.44.65.25
AZELARAB MOUSTAID	COOPERATIVE	0662.56.32.67
ABDLALI KARIM	TADAMOUN ASSOCIATION	0652.48.98.23
DRISS BRIKICHA	TADAMOUN ASSOCIATION	0670.47.52.77
MOHAMMED MOUTANGHERI	TADAMOUN ASSOCIATION	0666.12.61.44
ABDELALI SADOK	AIN NOUK BI: POTTERY	0660.49.71.15

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Identification
Evaluation of the subactivity: Promotion campaigns
Name of the focus group: International Actions
Date of FG, location: 07/25/2013 (1.30pm) DRA, Marrakech
Moderator: El Haddad Mustapha
Number of participants and gender division: 5 participants, 3 of them women
Criteria for selecting the focus group: Participants in the Trade-Marketing Seoul, New York Trade Fair, Trade-Marketing Moscow
Questions dealt with
<p>Question 1: Hearing about the opportunity to participate...</p> <ul style="list-style-type: none"> - Through the regional tourism delegation, majority of the participants - Direct contact (visits from a DRA representative together with a photographer and a member of the Al Karama association.
<p>Question 3: Aspects which worked well, positive points?</p> <ul style="list-style-type: none"> - Everyone felt that the organization was the strong point of the promotion campaigns. - Financial subsidy, help on site and taking on responsibility. - Monitoring and support by the organizers (mail, telephone, appointments made...). - Developing contacts and arranging professional encounters. - Fairs were well organized.
<p>Question 4: Aspects which did not work well:</p> <ul style="list-style-type: none"> - During campaigns abroad (Moscow, for example), the entire group participated in all the meetings although not all participants were necessarily affected. The meetings should target those participants who are truly affected. - The participants should be supported during the fairs abroad at least twice, since it is not enough to participate in only one fair and we do not have the necessary means to participate in another trade fair abroad. - Promises which were made were not kept. Example: we were promised that each of us would participate in one trade fair and in one campaign abroad, which was not the case. - Having individual stands when the stands could have been shared. - Having a global vision and an annual program of the international fairs and promotion campaigns in order to target and chose them. - Chose appropriate destinations. In Seoul (furniture fair) for example, the national Asian handicraft is of good quality and better priced. On the other hand, participants with “<i>large and heavy tables did not meet the preferences and choices of the Koreans, who have small houses and small rooms</i>”. Quote from one of the actors. - At the New York trade fair, our stands were eccentric and not well positioned.
<p>Question 6: Actions to be put in place:</p> <ul style="list-style-type: none"> - Firstly, there was a desire to change. - Working on and producing smaller articles (marketing). - Reviewing our products. - Changing the means of transportation: For example for the American market, orders should be sent rapidly and at lower cost. “We wonder why the State did not support us (no subsidies, no customs advantages) to ship our products abroad?”.
<p>Question 9 : Lessons to be learned, suggestions :</p>

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<ul style="list-style-type: none"> - Respect the commitments “<i>promises made in advance should be kept, since artisans have a good memory!</i>”. - Gather information beforehand about the program of the international campaigns. - Select the participants in the campaigns depending on their centers of interest. - Ensure that it is not always the same people who participate in several activities. - Stop and fight against the import of Moroccan handicrafts made in China. - Find a solution to the problem of raw materials produced locally, since they are very expensive. It is cheaper to import them (copper, silk). - Strengthen the (targeted) practical training for the artisans.
<p>Positive points</p>
<ul style="list-style-type: none"> - Organization and support - Financial support - The professionalism of the organizers - The contacts established - Receiving new orders - Motivation and self-confidence in order to produce more and better - Put in place new ideas to improve our products - Discovering new markets
<p>Negative points</p>
<ul style="list-style-type: none"> - Involvement of the participants should be more targeted depending on the topics and their areas of interest - Support should be ongoing and not only last for one trip - Stands should be shared and not individual - Not a lot of return on orders received - A lot of middlemen, both in the host countries and at national level, which meant that the artisans were not put into direct contact with clients abroad and often had to go through middlemen.
<p>Points of contention</p>
<ul style="list-style-type: none"> - To be honest, there was no disagreement between the participants on specific points apart from perhaps the subsidy and financial support which some deemed to be very important whereas others felt that an additional effort could have been made in order to allow the beneficiaries to participate in more exhibitions.
<p>Recommendations</p>
<ul style="list-style-type: none"> - Moroccan handicrafts are in demand, Morocco sells well abroad: “<i>We have overcome the lowest point and are now riding the wave again. Morocco is fairly fashionable almost everywhere</i>”. Quote from one of the actors. That is why these types of initiatives should be increased in order to help the artisans to participate in other international campaigns. - Target the participants according to topics. - Support the beneficiaries more (at least in order to participate in two trips) - Combat imported “Moroccan” handicrafts made abroad (specifically in China). - Always ensure that promises made to the artisans are kept.

PARTICIPANTS

Identification

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Evaluation of the subactivity: Promotion campaigns		
Name of the focus group: International Actions		
Date of FG, location: 07/25/2013 (1.30pm) DRA, Marrakech		
Moderator : El Haddad Mustapha		
Name	Organization / company	Contact details (telephone)
Benyoussef Samir	Design for today	0671506959
Solange Cohen	Samparely sarl	0661333643
Ghomari Nadia	Traditional sewing	0665204632
Izouka Mariam	Metalworks/copperworks	0661331226
Larbi Abdellatif	Leather/Pottery	0524440714

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Identification
Evaluation of the subactivity: National promotion campaigns
Name of the focus group: Beneficiaries of the national actions
Date of FG, location: 07/25/2013 (10.30am) DRA, Marrakech
Moderator: El Haddad Mustapha
Number of participants and gender division: 8 participants, 2 of them women
Criteria for selecting the focus group: Participants in the Marrakech Marathon, the Riad art expo, the Grand Price of Marrakech, handicrafts expo
Questions dealt with
<p>Question 1: Hearing about the opportunity to participate in the promotion campaign:</p> <ul style="list-style-type: none"> - Through the regional tourist delegation in view of participating in the exhibition (March 2013) - Through friends who were invited to participate in a DRA meeting (January 2013) - Through a supervisor to participate in the exhibitions (May 2013) - Through the DRA’s cooperation office - Through the DRA’s consulting firm which visited us and took photos for the exhibitions in Fez and Marrakech
<p>Question 2: What happened then?</p> <p>a. Why did you join the initiative?</p> <ul style="list-style-type: none"> - In order to spread knowledge about our products, to meet new people and new clients - Get to see other products and their quality and to gain inspiration - In order to potentially participate in exhibitions abroad - To contact other artisans - In order to enter into competition with the Fez handicrafts <p>b. Did you participate in information meetings?</p> <ul style="list-style-type: none"> - A meeting chaired by the Crafts minister at the Congress Palace in March 2013 - A meeting with Marrakech’s regional handicrafts delegate, before the meeting with the minister <p>c. Were the objectives of these campaigns clear for you?</p> <ul style="list-style-type: none"> - We were promised to participate in exhibitions abroad <p>d. Were you consulted on the content of the campaign?</p> <ul style="list-style-type: none"> - I was allowed to draw lots, there was complete transparency
<p>Question 3: Did the activities work?:</p> <ul style="list-style-type: none"> - The organization was up to scratch, even though there was only little time to prepare - It was an excellent opportunity for the artisans to make contacts, promote their products, get to know other products - Support of 2,400 dhs per participating artisan - Reception, monitoring and support - The organizers were true professionals
<p>Question 4: Which activities did not work?</p> <ul style="list-style-type: none"> - The dates were not suitable - Not enough publicity: no signs at the entrance to the city, the publicity campaign should be carried out well before the exhibitions take place - Some of the locations were badly chosen - The committee which was designed to select the best products was not equipped for the task, some of the members were not real artisans - Short duration of the exhibitions (3 to 6 days): it is not enough for 300 participants - The hotels had not been informed and had not been adequately prepared

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<p>Question 5: most important results?:</p> <ul style="list-style-type: none"> - Having a lot of contact and forging relationships with business people and clients - Come into contact with others - Concluding fairly large sales for some - Sales to important personalities (minister, Wali, delegate...) - Distributing many business cards - Successful exhibitions
<p>Question 6: Perspectives for you?:</p> <p>a. Would you like to repeat this experience:</p> <ul style="list-style-type: none"> - Yes, of course. It was a success - We have participated in this first experience and now it’s an ongoing strategy, we have to capitalize on this first experience: “<i>one cannot achieve everything at the first go</i>”. <p>b. Would you recommend this experience to a friend?:</p> <p>Yes, of course I will recommend this experience to my artisan friends, I may even lend them products, especially for the young ones, but not for the merchants</p>
<p>Question 7: Lessons to be learned, suggestions for improvements:</p> <ul style="list-style-type: none"> - Chose appropriate locations - Select appropriate dates: holidays, the month of December (end of year festivities) should be at the same time as the fairs - Prolong the fairs - Begin publicizing it long before the exhibition dates - Strengthen the publicity campaign, specifically target the hotels - Diversify the range of products on show - Possibility to participate in international campaigns
<p>Positive points</p> <ul style="list-style-type: none"> - The organization and support - Gaining a lot of contacts and forging relations with business people and clients - Come into contact with other people and become more open - Conclude a fair number of sales - Distribute many business cards - Financial support - Successful exhibitions - Transparency - Discovering new markets and attracting clients - These exhibitions brake the hegemony of certain people who have been the only ones to profit from such events since the 1970s
<p>Negative points</p> <ul style="list-style-type: none"> - Some exhibition dates and locations were badly chosen - Publicity was insufficient and not appropriate - Too short

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Points of contention
- Some felt that it would make sense to set up a federation (a sort of union) bringing all professions together (with an Amine), whereas others felt that there are already associations doing good work and there was no point in reinventing the wheel.
Recommendations
<ul style="list-style-type: none"> - Select appropriate dates and locations - Increase the duration - Begin publicizing it long before the exhibition dates - Strengthen the publicity campaign, specifically target the hotels - Diversify the range of products on show - Integrate the different artisan professions - Possibility to participate in international campaigns -

PARTICIPANTS

Identification		
Evaluation of the subactivity: National promotion campaigns		
Name of the focus group: Beneficiaries of the national actions		
Date of FG, location: 07/25/2013 (10.30am) DRA, Marrakech		
Moderator: El Haddad Mustapha		
Name	Organization / company	Contact details (telephone)
Abaid Latifa	Tifaout Cooperative	0661861568
Hicham Bouzamer	Independent Artisan	0663365073
Abdellah Namir	Independent Artisan	0648993733
Aït Belkhir Khalid	Independent Artisan	0610179724
Koumina My Hfid	Annahda Cooperative	0642120700
Fatima Zohra Alaoui	Traditional sewing	0661344377
Ali El Jabiri	Blacksmith	0661705101
Fassi Lahcen	Independent artisan	0661519832

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Identification
Evaluation of the subactivity: Promotion support
Name of the focus group: Tourist circuits
Date of FG, location: 07/26/2013 (10.30am) DRA, Marrakech
Moderator: El Haddad Mustapha
Number of participants and gender division: 4 participants, one of them a woman
Criteria for selecting the group: President of a cooperative, head of CRT, associations, independent artisans
Questions dealt with
<p>Question 1 : Hearing about the redefinition of the circuits:</p> <ul style="list-style-type: none"> - Through the regional tourism delegation to participate in a preparatory meeting for the project. The meeting was held in this room (DRA) with representatives from the Crafts ministry, MCC, APP, province authorities, associations and cooperatives; - One (foreign) MCC representative came to see us in our workshops and asked us a few questions, notably: <i>“If there is financial support for you, will you participate in this project or not?”</i>; - Through colleagues who informed us that there was an American organization which would finance a large project to help the handicrafts sector develop;
<p>Question 2: What happened then? Were the objectives clearly explained to you? What about the content of the activity?</p> <ul style="list-style-type: none"> - Beforehand, a meeting was organized in the Congress Palace in Marrakech, which was chaired by the relevant minister, where we heard about the project to redefine the tourist circuits. A representative of the consulting firm talked about the integrated circuits and the panels. We were surprised to see that the circuits had already been marked out and that we had not been consulted, although we are primarily affected (we represent the associations and the federation) by this project; - During this meeting, which was very official, we were not given the opportunity to express our ideas or our opinions. <i>“And we felt that the work had already been done and that there was nothing we could change, for us, it was too late to react, there was no going back, the ball was already rolling!”</i>. <ul style="list-style-type: none"> c. What was the opinion you expressed about this initiative? - We were a bit frustrated and we had the impression that we were the last ones whom the people in charge of the sector were thinking about.
<p>Question 3: Your reaction to the definition of the circuits? :</p> <ul style="list-style-type: none"> - <i>“To be honest, I only recently started to understand the circuits’ topics, since there was not enough time planned to explain the meaning of the five circuits to us. It’s only after six months that I’m slowly starting to understand the meaning of the circuits and their topics!”</i>. - We felt that the panels, in spite of criticism that can be made, have advantages and we are optimistic. The panels will certainly bear fruit with time. - There is a sort of interaction between the tourists and the panels. - <i>“We (the cooperative), in Sidi Amara, we are far from the circuits. There is nothing to indicate where we are. By the way, this is the first time that I’ve heard about the circuits!”</i>. - The idea was interesting and tempting: breaking old habits and mechanisms that are in place. - <i>“These circuits have been redefined in order to fatten up those who are already doing well!”</i>. - As for the content of the panels, there is something fairy tale like or folkloric about them, a little outdated. Should be avoided.
<p>Question 4: What were the results for you?:</p>

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<ul style="list-style-type: none"> - It's too early to talk about results yet. - So far we haven't seen anything, but I am sure that in future we will see some positive effects. For the moment, the craft sector is going through a crisis. - <i>“There are some positive signs: The panels and their contents whet the tourists' appetite”.</i> - <i>“The tourists now use modern tools (cell phones, internet) which they can use to find their location or to find a monument... We need to adapt accordingly, for instance by having our own site. The project did not help us in this respect”.</i> - The contribution by and advantages of the project are not evenly spread around between the beneficiaries. - We are hopeful. - In Sidi Amara, there is nothing, no results, since it was not included in the circuits.
<p>Question 6: Do you think that the circuits will attract more tourists?:</p> <ul style="list-style-type: none"> - <i>“Yes, of course. Once the tourism sector has overcome this international crisis, things will certainly get better.”</i> - These circuits will attract both national and international tourists. - This will allow the noble role of the Moroccan artisan to gain more value. - <i>“Some of the content on these panels is incorrect and should be corrected”.</i>
<p>Question 9: Lessons to be learned?:</p> <ul style="list-style-type: none"> - Raise more awareness and do a lot more publicity. Inform, explain and argument better. - Place more emphasis on the artisans' workshops. - In all the brochures, the tourist circuits should be advertised. - Review the tourist circuits together with the artisans to make some changes to the content and placement. - Respect the charter of the city of Marrakech as far as the panels are concerned. - Involve the other parties more (City council). - Aim a bit higher.
<p>Positive points</p>
<ul style="list-style-type: none"> - These circuits will attract both foreign and national tourists. - The circuits will help combat connivance and plotting, unfair competition and monopolies that some big artisans have been running for years. - Awareness can be raised among journalists and local and national press agencies in order to speak more about our products. - The circuits invite the tourists to go further to discover our handicrafts and it whets their appetite and makes them curious. - The financial support for these activities (panels, studies of different circuit scenarios...). - The panels along the circuit are now real and put up, which is good. - We are expecting more positive impacts in the future.
<p>Negative points</p>
<ul style="list-style-type: none"> - The panels do not respect the charter of the city of Marrakech. - Badly place panels (almost invisible), especially the orientation panels (this is the case for Souk El Ghassoul). - No awareness raising campaign or sufficient explanations. - Designing the panels: they are quite rudimentary and not up to the standards of a city like

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Marrakech.
Points of contention
<ul style="list-style-type: none"> - These arose around the subject of certain panels containing errors. Some agree and others disagree with the fact that great city historians contributed to creating these panels. - Also the positioning of some of the panels. Some people are happy with it while others are not.
Recommendations
<ul style="list-style-type: none"> - Explain the meaning and the topics of the circuits better. - The tourist circuits should be advertised in all brochures produced. - The publicity and awareness campaigns should be intensified. - Draft a ‘Handicrafts map of Marrakech’. The CRT is willing to contribute to the realization of such a map. - Involve the artisans more in the definition of the tourist circuits and in the placing of the panels. - The panels need to be more convincing. - Speak more about the artisans than about the circuits and the panels. - Advertise and place emphasis on the historical meaning of the workshops and the handicrafts professions. - Review the content, the format and the placing of the panels. - Mention the circuits on dedicated tourist sites (Marrakech Travel for example). - The panels should respect the city charter. - Revise the folkloric aspect of the panels’ content and correct any errors that may have slipped in. - Produce a professional documentary (3 to 4 mins) on the handicrafts in the area. Financing could come from the INDH, the ministries in charge (crafts, tourism), or the handicrafts chamber. - Include the circuits in CRT communication documents and those of other actors. - Hang appropriate advertising material in the airport.

PARTICIPANTS

Identification		
Evaluation of the subactivity: Promotion support		
Name of the focus group: Tourist circuits		
Date of FG, location: 07/26/2013 (10.30am) DRA, Marrakech		
Moderator : El Haddad Mustapha		
Name	Organization / company	Contact details (telephone)
Abdelmajid Ditâa	Independent Artisan	0652949281
Kharbib My	Independent Artisan	0663822776
Fatima Lksaïb	President of the cooperative (crafts)	0662781345
Benanib A.	Head of CRT	0661410968

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Identification
Evaluation of the subactivity: National Label
Name of the focus group: Trainers, SMEs which were audited for the national label
Date of FG, location: 07/24/2013 (1.30pm) DRA, Marrakech
Moderator : El Haddad Mustapha
Number of participants and gender division: 4 participants, one of them a woman
Criteria for selecting the group: Participants of the training for trainers, SMEs, audited cooperatives and independent artisans
Questions dealt with
<p>Question 1: Hearing about the labeling scheme for Moroccan artisans: First phase:</p> <ul style="list-style-type: none"> - Through the regional tourism delegation, for most of the participants - The handicrafts ministry - Through artisan colleagues <p>Second phase:</p> <ul style="list-style-type: none"> - Telephone calls from the DRA in Marrakech - During a meeting at the Congress Palace in Marrakech, chaired by the minister, where many presentations and explanations were given by experts.
<p>Question 3: Were the lessons learned during the training and throughout the support adopted or applied?</p> <ul style="list-style-type: none"> - We especially benefitted from the training action - Especially reviewing and improving our products without damaging their authenticity and their distinctive aspect - 50% of the training given was useful - It reinforced the cultural aspect of our handicrafts products - Commitment for more quality - Becoming aware of safety and hygiene issues and of the physiochemical risks inherent in the products we use - We learned that are products are culturally and historically important and we are trying to increase this aspect in the design of our products - We are more prepared and motivated to really try and improve the quality of our products
<p>Question 5: Successful factors:</p> <ul style="list-style-type: none"> - The certification - Protecting the producers - Applying norms and standards
<p>Question 6: Factors which caused annoyance:</p> <ul style="list-style-type: none"> - There were no factors which caused annoyance
<p>Question 7: How will the establishing of the label change the artisans’ professional lives?:</p> <ul style="list-style-type: none"> - Our (labelled) products will have greater value: “A labelled product is a <i>signed product</i>”. Quote from one of the actors. - Introducing new ideas, innovation and creativity. - More respect, trust and consideration gained from clients. - The labeling process will open new doors for our products. - Establishing the label will allow for a classification and a selection between producers: only the

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<p>best artisans and the best PMEs will prevail.</p> <ul style="list-style-type: none"> - Creating useful competition between the artisans and SMEs. - Allow for the artisan sector to be organized and regulated. - Allow for a classification and ‘filter’ of the artisans and SMEs according to the reliability and quality of their products.
<p>Question 9: Level of appreciation of the ongoing promotion campaign for the label?:</p> <p>We didn’t see anything, nothing.</p>
<p>Question 10: What can ensure that the label lasts and become sustainable?:</p> <ul style="list-style-type: none"> - Reliability - Honesty - Quality of work and products - Respect for the labeling criteria - Support by the state - Fight against imitations that might try to “<i>fake the label’s logo</i>”!
<p>Question 11: Lessons to be learned, suggestions for improvement:</p> <ul style="list-style-type: none"> - As for the participants, it’s a little early to reply to this question. - Raise more awareness on the benefits and advantages to be gained from the labeling and on its positive impact. - Isolate the «<i>intruders and parasites</i>»: expression used by one of the participants. - The labeling process is an important construction site which needs to be built on with a great deal of reliability and professionalism. - It is long-lasting. - The product exists, the content is there, it just needs to be emphasized through awareness raising campaigns.
<p>Positive points</p>
<ul style="list-style-type: none"> - The organization and the support - Artisans’ and SME’s predisposition and motivation to improve the quality of their products and join the labeling process - The introduction of new creations, lines and forms without changing the distinctive characteristics of our craft. - More trust and consideration from the clients. - Support by the state. - The labeling will open new doors for our products. - Hierarchy and classification of the producers so that the best artisans and SMEs come out on top. - Creates useful competition between the artisans and SMEs. - Allows the handicrafts sector to be more organized and regulated. - Allows a classification and ‘filter’ of the artisans and SMEs according to the reliability and quality of their products. - Discovering new markets and attracting informed customers.
<p>Negative points</p>
<ul style="list-style-type: none"> - Too early to judge the negative aspects of the labeling process

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Points of contention
- There were not enough participants present for points of contention or disagreement to emerge.
Recommendations
<ul style="list-style-type: none"> - Motivate and raise awareness among more artisans and SMEs in order to join the labeling process - Isolate intruders and people who want to exploit the system and fake artisans from the process - Plan inspections and sanctions for fraudulent behavior - Make sure this aspect is managed professionally and reliably - Increase the awareness raising campaigns.

PARTICIPANTS

Identification		
Evaluation of the subactivity: National label		
Name of the focus group: Trainers, SMEs which were audited for the national label		
Date of FG, location: 07/24/2013 (1.30pm) DRA, Marrakech		
Moderator : El Haddad Mustapha		
Name	Organization / company	Contact details (telephone)
Chaoual El Moust	Choumous Art Company	0661487790
Atika Ewkhli	Sabirate Cooperative	0673574716
Ennasih Khalid	I.A.T. Marrakech	0665451215
Khalloufi Driss	Pottery Marrakech Company	0665504537

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Identification
Evaluation of the subactivity: Production
Name of the focus group: Potters who did not acquire kilns
Date of FG, location: 07/24/2013 (10.30am) DRA, Marrakech
Moderator : El Haddad Mustapha
Number of participants and gender division: 6 participants, all men
Criteria for selecting the group: Independent artisans, potters who took part in the training sessions, potters who had a financing agreement, potters who had already acquired a new kiln
Questions dealt with
<p>Question 1: Hearing about the opportunity to participate.....</p> <ul style="list-style-type: none"> - Through the regional tourist delegation (is the channel most mentioned by the participants) - Through the Al Koutoubia association located in Saada
<p>Question 2: What happened then?</p> <ul style="list-style-type: none"> - There was a series of meetings mainly with the crafts delegation (information) - There were also some surveys carried out - A lot of promises were made (most of them were not kept)
<p>Question 4</p> <p><u>Positive points:</u></p> <ul style="list-style-type: none"> - Thanks to the training we received we now have a clearer idea of what we want and what we can do. - As for the kiln replacements, only one person (Mr. Khazif) replaced his kiln and he is satisfied. <p><u>Negative points (ideas for improvement):</u></p> <ul style="list-style-type: none"> - The training period was not appropriate (just before the Aid El Kabir festival, whereas it is precisely during this time that we have the most work!). - Training sessions were very theoretical, there were hardly any practical aspects - For some modules, there were a large number of participants (30), which meant that the exchange with the trainers was limited. - Some participants were completely illiterate and could not follow the training properly or benefit from the lessons (marketing, design). Also, they sometimes held back the other participants by requesting more detailed explanations. - The kilns which were delivered did not respect the CPS clauses (in terms of automatic running, when the external parts heat up more than they should). - There was no real technology transfer, since there was no training on how to use the kilns which were to be purchased and there was only one demonstration which was vague and not very detailed. - A lot of slow and complicated administrative hurdles to overcome in order to receive the bank loan (contribution of 20%).
<p>Question 5: Reasons for not buying a kiln:</p> <ul style="list-style-type: none"> - The kilns are very expensive: about 560,000 Dhs - Their own contribution is high: 102,500 Dhs - Interest rate proposed by the banks is high (6%): We ask for the government’s support to lower this rate. <p><i>“It was especially those who already had sufficient means who benefitted from the project, just like in the Arboriculture fruit tree project which mainly benefitted the large farmers who had large tracks of land”. Quote from one of the actors.</i></p>

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<p>Question 6: Alternative solution:</p> <p>The Moroccan companies were not able to participate in the call for proposals since they do not have sufficient means to respect the norms and standards required in terms of hygiene, safety and environmental protection.</p>
<p>Question 7: Applying the training results:</p> <ul style="list-style-type: none"> - Yes for certain modules, according to the possibilities (estimate: 40% of the lessons learned will be applied) - Lack of space and of basic training means in order to apply the lessons learned (design, marketing) - Illiteracy was a handicap for some participants who could not follow the content of the course and who are therefore not motivated and disturb the other participants.
<p>Question 8: What has changed...?</p> <ul style="list-style-type: none"> - Improved products (reviewed) - A more respectful and professional behavior towards clients - Consequently, the sales price increased - For some: Nothing
<p>Question 9: Lessons to be learned, suggestions for improvement...</p> <p>Ourika:</p> <ul style="list-style-type: none"> - Change the training period (appropriate time: January – February) - More practical training elements - Combat illiteracy - More training sessions concerning the core of the business, especially on the use of the new kilns <p>Tamesloht :</p> <ul style="list-style-type: none"> - Carry out continuous training sessions (one or two half days a week continuously and not three day training sessions followed by an empty period) - Training optimization: eliminate useless training sessions, monitor and evaluate the training sessions given - More practical training sessions <p>Amezmiz :</p> <ul style="list-style-type: none"> - Chose a more appropriate training time. - MCC (APP) has to supervise the undertaken projects very closely - <i>“Respect the CPS clauses scrupulously”</i>. Quote from one of the actors: it seems that certain clauses were neglected when the kilns were being purchased. - Involve civil society in monitoring the activities. - Ourika: Act quickly, since many promises were made but not all of them kept. - Think about raw material processing. - For increased transparency, make sure the beneficiaries can participate in the presentation of proposals and in selecting the kilns to be purchased.
<p>Positive points</p>
<p>The training: content and process. It allowed the beneficiaries to have a vision and to understand and grasp the means of production of each of them.</p>

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Skills and professionalism of the trainers.
Negative points
<ul style="list-style-type: none"> - The training sessions were fairly theoretical - The time period was not suitable - Level of the participants (illiteracy) - Slow and complicated administrative hurdles to overcome in order to receive the bank loan (contribution of 20%): “Those who have the means have already benefitted from the kilns without having to pass through the banks, whereas we who are not so well off are still waiting”. Quote from one of the actors.
Points of contention
<ul style="list-style-type: none"> - Difference in opinion an appreciation of the new kiln: some feel that the new kiln has well-known benefits over the kilns currently used by the potters. - Other have the opposite feeling, meaning that the new kilns offer no improvement over classical kilns, except perhaps on the issue of safety.
Recommendations
<ul style="list-style-type: none"> - Readapt the training periods (appropriate time: January – February) - More practical training sessions - Combat illiteracy - More training sessions aimed at the heart of the profession and especially on the use of the new kilns - Carry out continued training sessions (one or two half days per week, and not three days of continued training followed by empty periods) - Optimize the training sessions: eliminate useless training sessions, closely monitor and evaluate the training sessions given - MCC (APP) has to supervise the undertaken projects very closely - Apply the CPS clauses: it seems that certain clauses were neglected when the kilns were being purchased. - Involve civil society in monitoring the activities. - Act quickly, since many promises were made but not all of them kept. - Think about raw material processing. - For increased transparency, make sure the beneficiaries can participate in the presentation of proposals and in selecting the kilns to be purchased.

PARTICIPANTS

Identification
Evaluation of the subactivity: Production
Name of the focus group: Potters who did not acquire a kiln
Date of FG, location: 07/24/2013 (10.30am) DRA, Marrakech
Moderator : El Haddad Mustapha

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Name	Organization / company	Contact details (telephone)
Rachid Aouzal	Independent artisan	0665877246
Rachid Aït Jait	Independent artisan	0667967786
Abdelhak Hafidi	Independent artisan	0676304501
Oichande Mohamed	Independent artisan	0668311385
Khazif Abderrazak	Independent artisan	0666642083
Omar Benfdila	Independent artisan	0610250147

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Annex 8: Budget of the “Promotion support” and “Production support” subactivities

Activities/sub-activities in USD	Accordance with the approved multiannual financial plan in progress USD	Cumulative disbursements to 30 April 2013 USD	% achieved	Commitments as currently planned (on 22 May 2013) USD	% of commitments (on 22 May 2013)
TOTAL	13 669 848	5 544 242	41%	14 397 932	105%
Production support	4 312 216	2 456 707	57%	4 115 376	95%
Training of potters	ND	ND		ND	
Kiln replacement	ND	ND		ND	
Promotion support	9 357 632	3 087 535	33%	10 282 556	110%
Study of promotional needs	925 357	ND		925 357	100%
Promotional campaigns	4 756 599	ND		5 700 000	120%
The national label	1 1000 062	ND		1 100 000	100%
Tourist circuits	2 516 724	ND		2 516 724	100%
Marketing & Publicity Promotion	7 084	ND		7 084	100%
Contingency costs	21 845				
Sources :	DLP of 05-22-	AFM monthly report		DLP (Detailed Financial Plan)	

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	2013	April 2013	of 05-22-2013
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This budget sets out commitments up to 22 May 2013 that are 5% greater than the initial budget. For the “production support” subactivity the percentage of commitments on 22 May 2013 is 95% of the initial budget. For the “promotion support” subactivity the percentage of commitments on 22 May 2013 is 110% of the initial budget.

We can note a large volume of very late disbursements that must have occurred only in the last 5 months of the project. Thus, the disbursements up to 30 April 2013 represent only 59.7% of the commitments up to 22 May 2013 for the “production support” subactivity. The disbursements up to 30 April 2013 represent only 30% of the commitments up to 22 May 2013 for the “promotion support” sub-activity.

Therefore, for the “production support” subactivity, more than 40% of the funds were disbursed in the last 5 months of the project. For the “promotion support” subactivity the funds disbursed in the last 5 months of the project represent 70% of the total budget.