

Brand Morocco Case Study Competition



Fall 2006 Final Report

Semester End Recap

Executive Summary.....	3	Media Hits - United States.....	27
Quick Facts.....	5	Morocco Trip.....	31
Student Task.....	6	Media Hits - Morocco.....	32
Promotional Overview.....	9	Recommendations.....	36
Program Resources.....	11	Program Feedback.....	37
Process.....	12	Appendix.....	40
Cascade College Highlights.....	17	Case Study Overview.....	41
Johnson & Wales University Highlights.....	18	Case Study.....	43
Indiana University, South Bend Highlights....	20	Round 1 Scorecard.....	60
Bellevue University Highlights.....	22	San Diego Scorecard.....	64
Virginia Tech Highlights.....	24	Presentation Agenda.....	66
San Diego Presentations.....	25		

Executive Summary

The Moroccan American Trade and Investment Council (MATIC) implemented the Brand Morocco National Case Study Competition during the fall 2006 semester in **50** classrooms (42 undergraduate and 8 MBA) across the United States, Canada and Morocco. Each class was broken up into 3 to 5 person teams. Each team was asked to develop an Integrated Marketing Communications (IMC) plan to encourage U.S. commercial decision makers and consumers (where applicable) to purchase Moroccan products and invest in Morocco. Teams selected one of the below industries.

Over **900** students participated. In total, **63** different classes registered (51 undergraduate and 12 MBA) and 50 classes submitted entries. Complete registered school roster below. See page 12 to view schools that registered, but did not submit.

MANUFACTURING:

Cascade College
Florida Institute of Technology (MBA)
Portland State University
Stephen F. Austin State University
University of North Texas

PROCESSED FOODS:

Al Akhawayn University in Ifrane
Concordia University in Portland
Florida Southern College
Hawaii Pacific University (MBA)
Indiana University in South Bend
Indiana University in South Bend (MBA)
Morningside College
Ryerson University
University of Northern Colorado
University of Ottawa

INFORMATION TECHNOLOGY:

Johnson & Wales University
McMaster University
New York University
Northwest Nazarene University (MBA)
Rensselaer Polytechnic Institute

TEXTILES/APPAREL:

Ball State University
Douglas College
George Washington University
Hawaii Pacific University
Loyola Marymount University
Mesa State College
Northwood University
Oakland University (MBA)
San Jose State University
Savannah State University
Valparaiso University (2)
Virginia Tech
Virginia Tech (MBA)

DESIGN MATERIALS:

Bellevue University
Brigham Young University in Hawaii
Bryant University
Cape Breton University
Concordia University in Montreal
Drake University
Drexel University
Georgia Institute of Technology (MBA)
Loyola Marymount University (MBA)
Palm Beach Atlantic University
San Diego State University (not part of competition)
University of Florida
University of Northern Colorado
University of Ottawa
University of Texas in San Antonio
University of Western Ontario

Executive Summary

Each student team submitted their case study assignment to their professor for evaluation. The professor then identified the top case study from all submissions in his/her class. This top team (one per class) was then eligible to submit their Brand Morocco case study for entry in the Brand Morocco National Case Study Competition. Judges evaluated all student team submissions and selected the top team in each of the five industries. These five (5) teams were invited to present their case to MATIC senior management, industry experts and the Centre for IMC at San Diego State University and compete for cash prizes. First place was awarded \$3,000 and a trip to Morocco, second place \$2,000 and third place \$1,000.

The top teams invited to San Diego State University were:

Manufacturing:

Cascade College

Information Technology:

Johnson & Wales University

Design Materials:

Bellevue University

Processed Foods:

Indiana University, South Bend

Textiles/Apparel:

Virginia Tech

The first place team was Bellevue University and five (5) students and one (1) professor won the trip to Morocco.

Brand Morocco Case Study Timeline:

Marketing Process Began	April 15, 2006
Deadline for Registration	September 15, 2006
Submissions Due to EdVenture Partners	November 15, 2006
Top Team Announced	December 1, 2006
San Diego Presentations - Winners Announced	December 15, 2006
Trip to Morocco for top team	May 20-26, 2007

Results

- **3,453** postcards mailed to faculty, deans, chairs
- **4,000+** emails sent to faculty, deans, chairs
- **63** classes registered (51 undergraduate and 12 MBA)
- **54** different schools registered
- **50** classes submitted entries (42 undergraduate and 8 MBA)
 - Manufacturing: **5**
 - Information Technology: **5**
 - Processed Foods: **10**
 - Design Materials: **16**
 - Textiles/Apparel: **14**
- **81** additional class submissions
- **131** total individual submissions (competing and non-competing)
- Over **900** students participated
- Top Teams:
 - 1st - Bellevue University (Design Materials)**
 - 2nd - Johnson & Wales (IT)
 - 3rd - Virginia Tech (Textiles/Apparel)
 - Honorable Mention: Cascade College (Manufacturing)
 - Honorable Mention: Indiana University, South Bend (Processed Foods)

The Case Study assigned task was as follows:

Student Task

This task requires analysis of **existing** primary and secondary research as well as the development of an IMC plan.

- I) For your chosen industry segment, review the research provided in this case and on the Brand Morocco Web site to provide context to the integrated marketing communications (IMC) plan you will create. Consider that with any of the five industrial sectors chosen, the final consumer's needs and preferences should be considered in strategically defining the IMC. This task for Brand Morocco is in the "push" portion of the marketing channel and deals with the B-to-B end of distribution. However, especially if textiles, agriculture and food processing, or design materials are chosen, the consumer communications to eventually be implemented should be outlined briefly.
 - Morocco's culture, economics and history
 - How do Morocco's geographic location, political environment, and business environment affect potential new business ventures?
 - What economic incentives does Morocco offer that would appeal to the target audience?
 - Are there aspects of Moroccan culture that would be considered beneficial by would be beneficial to the target audience? How do Morocco's geographic location, political environment, and business environment affect potential new business ventures?
 - Target audience
 - What are the defining characteristics of the target audience?
 - What are the target audience's perceptions of Morocco?
 - What specific beliefs and attitudes must be overcome and changed in order to move beyond existing barriers to consideration?
 - Pay special attention to overcoming the outdated "desert oasis" images of Morocco
 - What are they seeking from a business partnership with Morocco?
 - How can Morocco's assets be leveraged to show they provide the benefits the target segment seeks?
 - For design products, textiles, and agriculture and food processing, what are the final consumer needs that will have to be interfaced with the B-to-B Integrated Marketing Communications?
 - Competition
 - In your specific industry segment, what countries are in the competitive set for Morocco, particularly in the Mediterranean and EU regions?
 - What are the strengths of the competition? Why are businesses attracted to these locations?
 - How can Morocco's competitive advantages be leveraged against the competition's strengths?

Student Task

- Success stories
 - What examples exist of companies launching successful ventures in your chosen industry?
 - How might these examples be used to illustrate the benefits Morocco offers?

II) Design an integrated marketing communications (IMC) plan targeted at commercial decision makers in the industry you have chosen. The goal of the plan is to reach your chosen target audience segment, increase their awareness of Morocco and prompt them to consider Morocco as a place to initiate a business venture/investment.

Your plan should include:

- Background/situation summary
- Competitive overview
- Target market profile
 - Include defining characteristics in addition to attitudes and beliefs about Morocco
- Overall marketing objective
 - Include an explanation of the brand equity and image you are building for Morocco
 - Develop key marketing messaging about Morocco
 - For textiles, design products, and agriculture and processed foods, outline briefly what the eventual “pull” message might be that is eventually directed to the consumer, and identify how it will interface with your message and the IMC developed by you for the industry sector decision-makers.
- Marketing tactics, which may include but are not limited to:
 - Advertising; traditional and guerilla tactics
 - Public Relations
 - Sales collateral and/or face-to-face presentation materials
 - Personal selling activities
 - Events/promotion/sponsorships'
 - Trade publications/events/media
- Specific media plan recommendations
 - Identify the scheduling and sequencing of various media choices
- Overall budget
 - The costs of executing your IMC plan should not exceed a budget of \$1 M USD annually. This includes all production, creative and media expenses. Note: if a minimal incremental increase in the budget will bring exponential benefits, this recommendation may be included with accompanying justification.
 - Media that targets television or publications aimed at the general public must be justified in terms of cost effectiveness and ROI.

Student Task

- Creative execution of all advertising campaigns and writing samples for PR pieces
 - Develop a visual identity and brand identity for Morocco
 - Creatively execute your key marketing message
 - Be sure to utilize existing examples of successful American international business ventures currently in Morocco to support your key messaging

Make sure your review of the existing research findings justify your plan elements. Your knowledge of the target audience, situation summary, and competitive analysis should lead logically into your IMC recommendations. Remember, the key marketing message of your plan should appeal to all members of your target audience covering a maximum range of sub-sector targets within your identified industry sector.

The IMC plan for MATIC needs to take into account key challenges and opportunities:

- Among the target audience of U.S. commercial decision makers, familiarity with Moroccan culture and awareness of Morocco's benefit as a location for off-shoring is extremely low
- The target audience has an outdated image of Morocco as a remote desert oasis (i.e., the setting for the movie "Casablanca") which must be addressed
- Commercial decision makers are corporate executives and business managers who are often difficult to reach via traditional marketing communication channels
- Morocco possesses key competitive advantages in each of the industry segments identified. A detailed IMC plan will center on highlighting and communicating these advantages
- The IMC plan needs to focus on high-level benefits that have broad appeal across all members of the chosen target audience
- To illustrate these benefits, each IMC plan should utilize examples of success stories of companies that have established business ventures in Morocco

Overall educational objectives for the Brand Morocco National Case Study Competition were to:

- Develop student comprehension and analytical skills
- Accelerate student involvement, learning, leadership and personal development through team assignment format
- Expose students to professional client interactions
- Integrate technology into the learning environment
- Provide campuses and students the opportunity to showcase their talent on a national level in front of a real client
- Compete for cash prizes in a high profile national competition

Promotional Overview

The promoting process included direct communication with deans, chairs and faculty. An email list was also purchased from the Academy of International Business (AIB) that included 1,572 faculty. In total, over 4,000 faculty were contacted via e-mail in fields relating to Marketing, International Marketing, Advertising or Communication.

In addition, direct mail postcards were created and sent to 3,453 Deans, Chairs and Faculty. Most of these contacts had already received an informational e-mail, and the postcard was to reiterate the competition. EdVenture Partners attended a Marketing Education Association (MEA) conference in April and spoke with 100 faculty about the case study and handed out postcards.

A Web site was created to deliver an overview of the case study and be the central connection for the registration process. The e-mails and postcards directed the reader to the Web site for more information and to register. After registration, the faculty were given a user name and password. Faculty were then asked to have each student in the class register on the same Web site. After registration, both faculty and students were given access to the case study, rules/guidelines, additional resources and the template for the judges' scorecard.

Moroccan American Trade and Investment Council (MATIC) and EdVenture Partners
invite you and your students to participate in the

BRAND MOROCCO NATIONAL CASE STUDY COMPETITION

Beginning September 5, 2006, MATIC is sponsoring a unique case study. Students will have the opportunity to develop a strategic marketing plan to promote Morocco's business and investment ties with the United States. Join other colleges/universities in this competition by preparing an Integrated Marketing Communications (IMC) campaign based on a research case study detailing what Morocco offers U.S. companies as a result of the recently implemented U.S.-Morocco Free Trade Agreement (FTA).

THE ASSIGNMENT!
Students are to develop an Integrated Marketing Communications (IMC) plan for one of the following industry sectors: Parts Manufacturing, Information Technology (IT), Agriculture and Processed Foods, Textiles/Apparel or Design Materials. Encourage your students to develop an effective campaign that increases the awareness of new business opportunities in Morocco for commercial decision makers in the industry sector your students will address.

THE REWARD!
The top five (5) case study teams, comprised of the top entry in each industry sector, will present to MATIC executives and faculty at the Centre for IMC at San Diego State University, CA, all expenses paid. In addition, the overall winner, up to 5 students and 1 professor, will be flown, all expenses paid, to the Kingdom of Morocco with an overnight stay in New York City, to present their plan to Moroccan leaders and enjoy a tour of Morocco.

WHY IS THIS CASE STUDY UNIQUE

- ▶ Up to 100 colleges/universities will be participating in the U.S. and Canada
- ▶ Opportunity to develop an Integrated Marketing Campaign that may be used to promote U.S.-Morocco trade and investment
- ▶ Teams will present their case study to leaders in the Moroccan private sector and key government agencies

HOW TO REGISTER?
100 colleges/universities will be allowed to participate in the Brand Morocco National Case Study Competition and spots are filling up quickly, so don't wait to register. Please visit www.edventurepartners.com to find out more information and to register by the deadline of September 15, 2006. Faculty will need to register with the password "moroccocase" in order to participate in the competition.

Promotional Overview

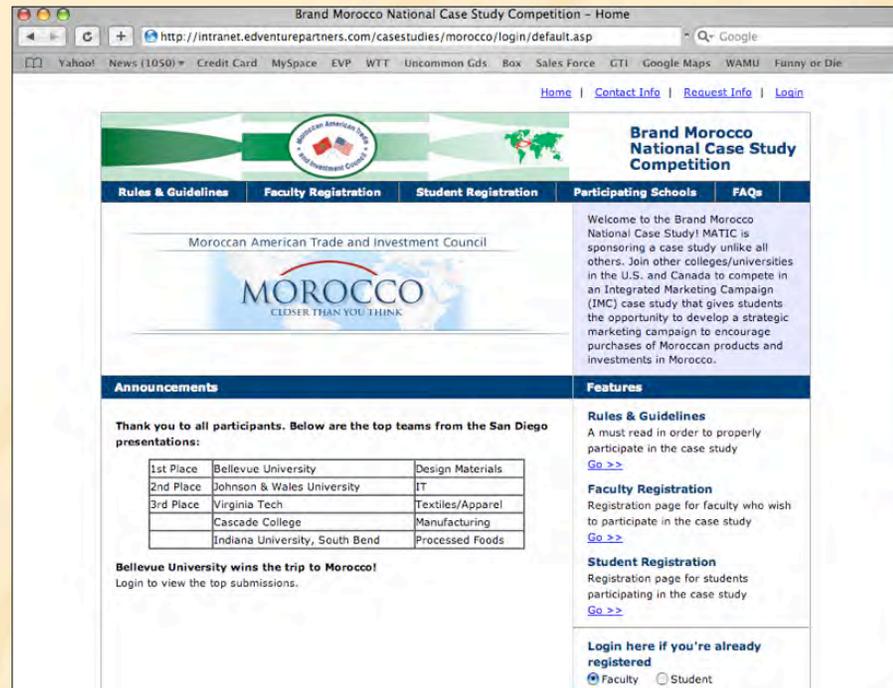
The marketing overview was as follows:

Personal phone calls made	April-August, 2006	120 top tier schools contacted
Marketing Education Association (MEA) Conference	April 26-27, 2006	100 postcards handed out
E-mail teaser blast #1 sent	April 26, 2006	981 emails (teaser only)
Postcard #1 printed and mailed	May 1, 2006	1,796 postcards mailed
E-mail blast #2 sent	May 8, 2006	2,283 emails (included student task and case outline)
Additional graduate professors emailed and sent postcards	June 26, 2006	85 emails/postcards
E-mail blast #3 sent	August 3, 2006	2,200 emails for final reminder to register
Academy of International Business (AIB) email list purchased and sent	August 4, 2006	1,572 total faculty emailed (1,396 in US, 176 Canada) 15.7% opened the e-mail 8.1% opened the link to read the case study 0 forwarded the e-mail 1 deleted e-mail without reading 344 Brand Morocco Web site hits
Postcard #2 printed and mailed	August 11, 2006	1,572 AIB faculty plus 1,635 additional faculty = 3,207 total
Conference call held with Ted Smith and faculty	August 18, 2006	Q&A session for faculty interested in participating

Program Resources

BM National Case Study Competition Web Site

A Web site was created and hosted by EVP as the communication hub and a way for faculty and students to access all required resources, updates and information.



Live Access

A Program Manager was assigned to manage the Brand Morocco National Case Study Competition. Faculty were frequently contacted via e-mail or phone to announce updates, give clarifications or to answer any questions. Faculty and students were also encouraged to contact the Program Manager at any time they felt necessary. Having this one-on-one interaction with faculty and students helped progress the case study and answer any questions.

Once faculty and students were registered on the Brand Morocco Web site, the following steps took place.

1. Welcome Letter and Case Study Posted

This phase included contacting all 63 registered faculty. Each faculty was sent an e-mail to confirm their participation. Following the e-mail, a welcome letter signed by Dr. Theodore Smith of MATIC was sent. The following is a list of schools that registered but did not submit an entry:

MANUFACTURING:

Florida State University
Indiana University (MBA)
University of North Carolina, Charlotte

INFORMATION TECHNOLOGY:

Bentley College
City University of New York
Massachusetts Institute of Technology (MBA)

PROCESSED FOODS:

University of Houston
Chapman University
Western New England College
Virginia State University
University of Illinois, Chicago (MBA)

DESIGN MATERIALS:

Florida A&M (MBA)

TEXTILES/APPAREL:

University of North Carolina, Charlotte

There were a variety of reasons why a few schools were not able to participate in the competition. The most common reason for not submitting was lack of time delegated in the course syllabus or the professors were not satisfied with the quality of submissions received in order to compete. Other reasons included too much competition with other class projects and faculty staff shortages.

2. Case Study Development

This phase was the development of the actual case study submission by the students. The students spent anywhere from 7 weeks to 10 weeks developing their submission. A portion of the development required the students to conduct secondary research and read through the Brand Morocco Research Program student reports.

This phase also included contacting the Program Manager in regards to the case study and submission expectations.

3. Submissions Due

On November 15, 2006 all submission were due to EdVenture Partners. Acceptable submissions were Word documents with a maximum of 30 pages in the body and 30 pages in the appendix.

4. Judging

Judging was a two-phase process with the second round conducted in San Diego (see phase 6). The first round of judging included all case studies to be scored with a 100-point scale by reputable professors not affiliated with any participating schools. Each judge was given one industry and all submissions for that industry to determine the top submission.

Academic judges selected for round one were:

Dr. Lois Olson (San Diego State University) - Manufacturing
Professor John Benavidez (New Mexico State University) - Information Technology
Dr. Norm Borin (California State Polytechnic, San Luis Obispo) - Processed Foods
Dr. Andrew Czaplewski (University of Colorado, Colorado Springs) - Design Material
Professor Don Purdy (State University of New York) - Textiles/Apparel

The following charts break down the first round judging scores. Those with highlighted bold red text were invited to the final round in San Diego on December 15, 2006.

MOROCCO CASE STUDY SUBMISSIONS		Scores	Design Materials	
Manufacturing			Bellevue University 98.5	
Cascade College		82.5	Palm Beach Atlantic University	90.5
Portland State University		72.5	Georgia Tech	92
Florida Institute of Technology		70	Concordia University (Montreal, QC)	89
Stephen F. Austin State University		60.5	The University of Western Ontario	88
University of North Texas		37	Drake University	87.5
Information Technology			University of Northern Colorado-Undergraduate #1	87
Johnson & Wales University		89	University of Texas, San Antonio	86.5
McMaster University		74	Loyola Marymount University-MBA	86.5
New York University		71	University of Ottawa-Section B	86.5
Rensselaer Polytechnic Institute		63	Cape Breton University	85
Northwest Nazarene University		56	Drexel University	84.5
Processed Foods			Brigham Young University, Hawaii	82
Indiana University, South Bend-Undergraduate		95.5	University of Florida	80
University of Northern Colorado-Undergraduate #2		92.5	Bryant University	80
Ryerson University		89	San Diego State University	n/a
Morningside College		82	Textiles/Apparel	
Al Akhawayn University in Ifrane (sent electronically)		78	Virginia Tech-Undergraduate	90
Florida Southern College		70	Mesa State College	89
Hawaii Pacific University-MBA		66	Hawaii Pacific University-Undergraduate	81
Indiana University, South Bend-MBA		64	The George Washington University	78
University of Ottawa-Section A		63.5	Loyola Marymount University-Undergraduate	70
Concordia University (Portland, OR)		55	Virginia Tech-Graduate*	63
			Valparaiso University-Section B	62
			Oakland University	59
			San Jose State University	59
			Ball State University	57
			Douglas College	52
			Northwood University	44
			Savannah State University	40
			Valparaiso University-Section A	42

5. Winners Announced

On December 1, 2006, the top team from each industry was announced. Each professor was called directly to congratulate the team. An announcement was made on the EdVenture Partners and Brand Morocco Case Study Web sites, and a competition wide e-mail was sent to all participating teams.

6. Presentations at the Centre for IMC (San Diego State University)

The top team in each of the five (5) industries was given the opportunity to present to MATIC executives, industry experts and the Centre for IMC on December 15, 2006. Each team was given 25 minutes to present their case study and 10 minutes for a question and answer session. Immediately following all the presentations, the judges met and determined the winning team. Bellevue University was the overall winner.



Mr. Jean AbiNader, MATIC

7. Wrap Up

The winners were announced on the Brand Morocco Case Study and EdVenture Partners Web site Home pages. The top teams' PowerPoint and in-person presentations were also posted for other participating teams and visitors to review.

8. Trip to Morocco

Bellevue University, accompanied by MATIC and EdVenture Partners representatives visited Morocco from May 21-26. The itinerary was as follows:

May 21: Presentation for Moroccan Government Officials, site seeing in Rabat and dinner hosted by U.S. Ambassador Thomas Riley

May 22: Drove to Casablanca, presentation to business community and professional associations, met with Center for Education (Dr. Ogara) and dinner at Rick's Café

May 23: Meeting at Regional Investment Center in Rabat, lunch at Yacht Club with representative of the Moroccan government, drove and met with Wali of Kenitra

May 24: Drove to Ifrane and toured Al Akhawayn University, lunch hosted by Wali of Fès and site-seeing in Fès

May 25/26: Free time



Top Right: Lunch with Wali of Fès



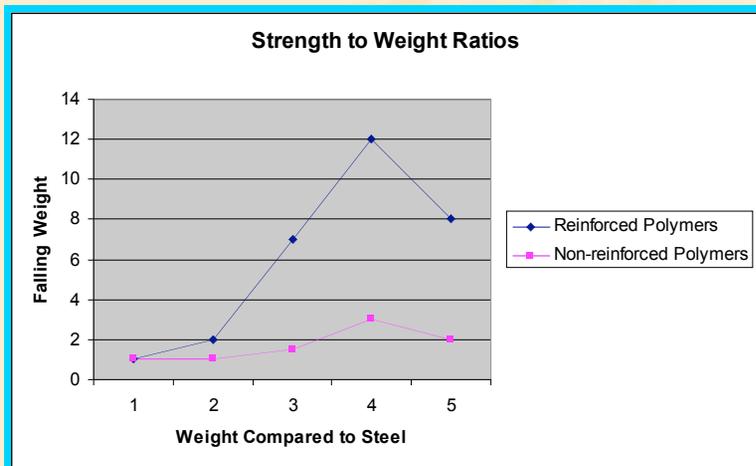
Bottom Center: Lunch with representative of Moroccan government



Bottom Left: Dinner at U.S. Ambassador Thomas Riley's

Cascade College Highlights

Manufacturing



Brand Morocco National Case Study: Manufacturing

Cascade College

PROPOSITION:

That Moroccan companies team with American companies to manufacture Carbon Fiber Reinforced Polymers (CFRP), which are used extensively in parts for planes, vehicles, rail cars, engines, and a number of non-related industries.

- By tapping into the well-established and rapidly growing global market for CFRP, Morocco can become the hub for manufacturing the component materials and products that are increasingly used by industries that have customers throughout the region
- There are only a handful of US companies that dominate the CFRP market so access to the technologies and potential investors is easily targeted
- CFRP is the fastest growing strong and lightweight material in production and plays a significant role in the new Boeing.... and Airbus...
- The key ingredient in CFRP is phosphate, the largest mineral extraction industry in Morocco

THEME:

"Make an old friend your new business partner"

I. Perceptions of Morocco in the US as a Manufacturing Platform for Regional Markets:

- **The Casablanca effect:** American audiences have a highly romanticized view of Morocco and the overwhelming perception of the country is neutral to positive with very few negatives.

II. How Best to Reach Business/Investment Decision Makers – Strategic Marketing Recommendations:

- In response to the lack of strong positive perceptions of Morocco in the US, the goal for this project is to shift the vision from a romantic view of the country to one that recognizes Morocco as a very favorable opportunity for investment and growth in profits.
 - Morocco has the human and natural resources, economic infrastructure, and government incentives that make it an extremely competitive location for manufacturing for regional markets.
 - Morocco has the experience and expertise to work globally to utilize and promote its products throughout the region.
 - **Brand Morocco** is a comprehensive approach to investment promotion that positions Morocco through an interrelated marketing campaign focused on specific companies and decision-makers, in a range of defined industries and sectors, and with the data and analysis that builds a strong business case for Morocco as a regional leader in CFRP.
- The key strategic investment by MATIC is to meet with CFRP executives with a well-executed case on the profitability of investing in Morocco to meet the needs of regional markets.

Johnson & Wales Highlights

Information Technology - Call Centers

Brand Morocco National Case Study: Information Technology

Johnson & Wales

PROPOSITION:

Develop an Integrated Marketing Communications plan based on four themes: Knowledge, Expertise, Communication, and Efficiency. It will persuade United States businesses with French operating counterparts to move their French and Spanish speaking call center services to Morocco, establishing Morocco with a stronger high-tech industry based brand image and equity.

- It is crucial to develop the country of Morocco as a brand: "Establishing brand awareness and a positive brand image... produces the knowledge structures that can affect consumer response and generate based brand equity" (Keller 325).
- Prior perceptions must be addressed and overcome.
- This IMC will create awareness among our target audience.
- Target audience: United States companies with operations specifically involving French and Spanish operations decision makers (CEO, CFO, etc.), further narrowed down to focus on the high-tech services industries.

THEME:

"Morocco: Exemplifying the Changing World"

I. Perceptions of Morocco in the US as an IT Platform for Regional Markets:

The current perception of Morocco as a place to conduct business in the high tech industry is very limited due to a lack of specific knowledge about Morocco that has led business leaders to make incorrect assumptions:

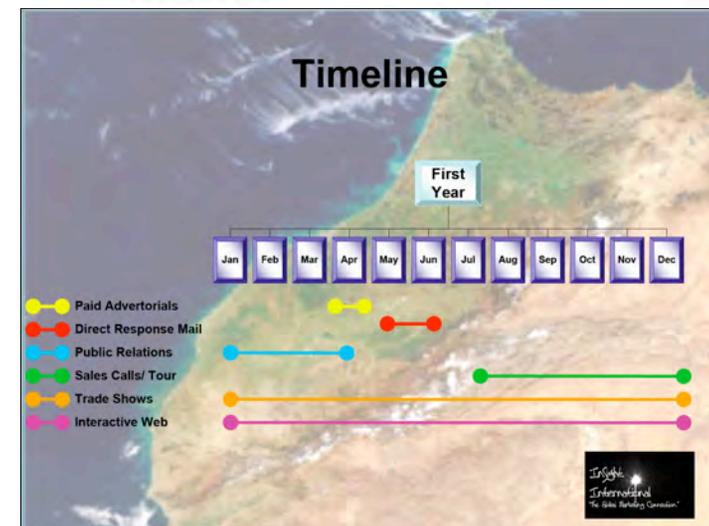
- The perception of Morocco as depicted in the classic WWII movie "Casablanca" is the primary image.
- Business managers and decision-makers have an extremely low awareness of Morocco as a location in which to do business.
- Executives are unsure about the wisdom of an investment in Morocco, the economy's stability, or government incentives.
- Morocco's opportunities from chaotic distribution and communication channels to human rights and labor issues.

II. How best to Reach Business/Investment Decision Makers – Strategic Marketing Recommendations

Brand Morocco should operate as a cycle where the country promotes its consumer brands, those brands will in turn, promote the country. *Implementing these changes in a timely and integrated manner can generate substantial modernization in the Moroccan economy by making sure that US companies get extensive knowledge about it in order to consider Morocco for outsourcing and investing.*

In order to achieve these objectives, the following plan of action is suggested:

- Communication tools strategy:
 - Public Relations: To increase the depth and breadth of brand Morocco to the target audience, send press kit to major trade journals, newspapers, magazines, and online news media. Press kit should include descriptions of success stories, benefits, and FTA added value. Should develop a guerilla tactic to bring story to attention of media.
 - Database Marketing: To identify key United States businesses that have operations specifically in France and Spain so that they can be encouraged to move their call center and off-shoring services to Morocco.
 - Advertising: To generate a buzz message to American businesses that realigns outdated images of Morocco to a more up-to-date trade and industrial country, ads should target specific developments that enhance off-shoring assets.
 - Direct Advertising: To stimulate curiosity of target market about the business benefits Morocco has to offer, encouraging further investigation in Morocco by prompting targets to the web-based interactive media. Use advertorials in key publications and distribute copies to target audiences.
 - Interactive: To increase perceptions of Moroccan business and French and Spanish speaking call center capabilities by establishing an interactive website to build brand image and equity.
 - Trade Shows: Attend targeted trade shows in the U.S. based on database marketing to promote off-shoring opportunities.
 - Sales Collateral and Face-to-Face Presentations: Create and distribute face-to-face presentation materials and sales collateral to create a new brand identity and image to target market. Primary application is at trade shows and one-on-one meetings with C level executives.



Johnson & Wales Highlights

Perception versus Reality



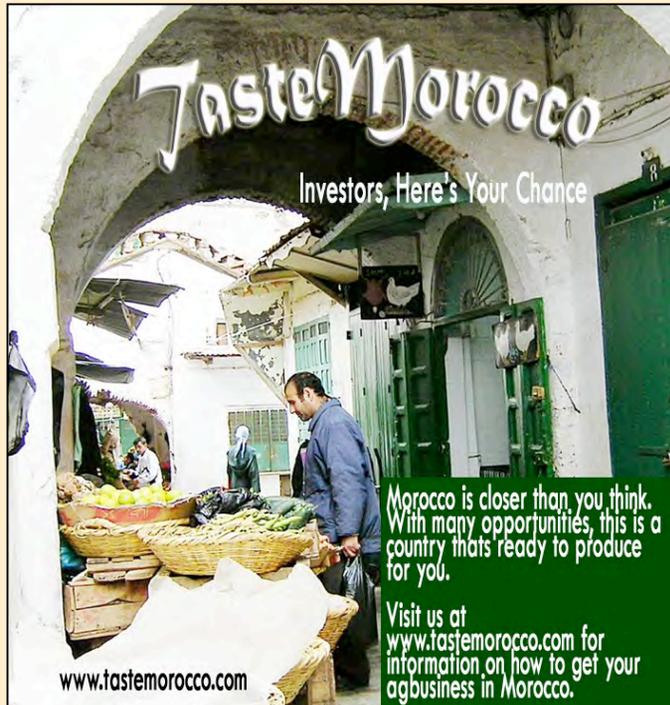
- “Casablanca” effect
- Post 9/11 Americans associate Islamic countries with terrorism
- Low awareness of Morocco and its capabilities
- Decision makers unsure of investment benefits in Morocco



- Developing business hub
- Safe and effective business environment
- Not just a tourist destination
- Credible and reliable
 - French-speaking call centers
- Companies currently operating in Morocco reflect positive experiences
 - 85% of respondents indicated their investment in Morocco was a sound decision

Indiana University, South Bend Highlights

Processed foods

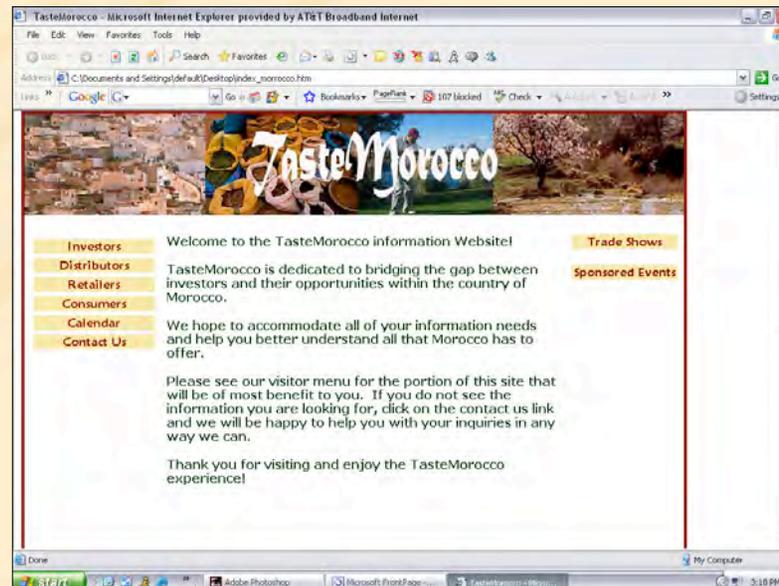


Brand Image:

- Experience
- Quality
- Uniqueness
- Exoticness

Brand Equity:

- Extend Morocco's current brand equity of a Romantic Nostalgic vacation destination to also include:
 - Stability
 - Profitability
 - Quality
- Overcome negative perceptions through use of educational promotion tools and sales collateral
- Through the IMC Campaign, reinforce these attributes by communicating Morocco's ability to provide:
 - High Quality Agricultural/Processed Food Products
 - Abundance of Underutilized Cost Efficient Labor
 - Feelings of Uniqueness and Exoticness



Indiana University, South Bend Highlights

Investors, Here's Your Chance.



Morocco. It's closer than many think. With the 2004 establishment of the United States- Moroccan Free Trade Agreement, it has become even closer to U.S. Investors. Since gaining their independence from France in 1956, the country has invested decades in establishing economic and political stability. Morocco is welcoming investment from the agricultural/food processing industry not only with open arms, but with numerous geographical, political, business, economic, and cultural incentives as well.

Taste Morocco

Primary Business Address
Your Address Line 2
Your Address Line 3
Your Address Line 4
Phone: 555-555-5555
Fax: 555-555-5555
E-mail: usaone@exsample.com
On the Web: www.tastemorocco.com

Taste Morocco

Cluser Than You Think.

Tel: 555-555-5555
www.tastemorocco.com

Marketing Message:

For those companies considering or actively searching for opportunities for international investment, Morocco should be on the short list for the following reasons:

- Cost Effectiveness
- Ability to Produce High-Quality Agricultural/Processed Food Products in
- Accessibility
- Market Growth
- Stability of Political and Social Environments

Trade Shows

- **All Things Organic Conference and Trade Show**, Chicago, IL, May 2007
- **AMI International Trade Show**, Chicago, IL, October 2007
- **Food, Dairy and Beverage Exposition**, Chicago, IL, October 2007
- **New England Food Service Trade Show**, Boston, MA, April 2007
- **Seafood Processing America**, Boston, MA, March 2007

Strengths

- ◊ Dedication to increased international trade and investment, as well as political, cultural, and social stability.
- ◊ Favorable business environment for US investors
- ◊ Continuous investments in infrastructure
- ◊ Climate and geography conducive to agriculture, similar to those found in Italy and Chile, and better than those found in China, Mexico, and Israel.
- ◊ Location and accessibility (distance wise) is better from a US standpoint than China, Chile, Israel, and Italy.
- ◊ Larger amounts of arable land than those found in Chile, China, Mexico, and Israel.
- ◊ Proven responsiveness to innovation and technology.
- ◊ Diverse mix of agricultural products including cereals, numerous types of fruits, vegetables, and fish, and dairy products, among many others.
- ◊ Established operations of numerous sectors of food processing.
- ◊ Large export industry that accounts for 21.2% (2005) of the country's GDP and 80% of the agricultural sectors revenue.
- ◊ Larger workforce than those found in Israel and Chile.

Morocco offers a vast array of reasons to invest there. Agricultural and Food Processing companies have much to gain by looking into foreign direct investment in Morocco.

If what you are looking for is an Abundance of natural resources, Reputation for expertise, Government incentives, Availability and education of job pool, Quality of infrastructure, Geographic proximity, Cultural familiarity and English language proficiency then you should **TASTE MOROCCO**.

Visit us on the web at www.tastemorocco.com for more information.



A Man looks on in a Moroccan marketplace.

Opportunities

- ◊ FTA and FTZ incentives for US investors.
- ◊ Investment Charter Law incentives.
- ◊ Established trade relationships with EU and African countries.
- ◊ Agricultural/food processing sector plays an important, pivotal role in the country's economy, has grown on average at 6.5% annually since 1990, and increased prosperity is expected.

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Your Address Line 3
Your Address Line 4
Phone: 555-555-5555
Fax: 555-555-5555
E-mail: usaone@exsample.com
On the Web: www.tastemorocco.com

Bellevue University Highlights

Design Materials

Marketing Mix:

Events

- Private museum receptions
- Executive breakfast in NYC

Public Relations

- Press release
- Press kit
- News conferences
- E-mail blasts

Advertising

- Brand Manager
- B2B advertisements
- B2B and B2C advertisements

Sales Collateral

- Sales tool box

Personal Selling

- Custom executive tour
- Airport package (inserts)

Trade Publications and Events

- B2C advertisement
- Trade show package



Old Friends, New Opportunities...

Connecting the Global Market
Morocco

4 out of 5 U.S. Businesses present in Morocco today recommend to other U.S. Executives to invest...

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* Source: American Chamber of Commerce in Morocco's 2004 survey of U.S. Investors in Morocco.

Connecting the Global Market
Morocco

Old Friends, New Opportunities...

Morocco-Connecting the Global Market

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WEBCAST Download Deal and new trade package interview

FAQ's on Moroccan Business

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Morocco Connects Global Markets

Julianne Turman, General Manager Polydesign systems—Morocco

"Morocco is our European Platform... we are able to Import in 3 hours and Export in 4 hours—it is truly state of the Art..."

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Consumer? Click Here to Shop Morocco

Top 25 Chambers of Commerce

Beginning June 2007 MATIC representatives will visit each of the top ranked U.S. Chambers of Commerce offices as part of an initiative to inform business Leaders of new opportunities available with Morocco...

More to the story...

Headlines

- Appropriation bill forecasts a 35% GDP growth in 2007 (10/18/06)
- Casablanca: More opportunities equal more investments (10/17/06)
- Electronic commerce show potential in Morocco (10/17/06)
- Al Qudra Holding set up office in Morocco. (10/16/06)

Moroccan American Trade and Investment Council, 1101 Vermont Avenue NW, Suite 411, Washington, D.C. 20005

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Bellevue University Highlights



Connecting the Global Market
Morocco

Leather Products

HIGH-QUALITY + DURABILITY

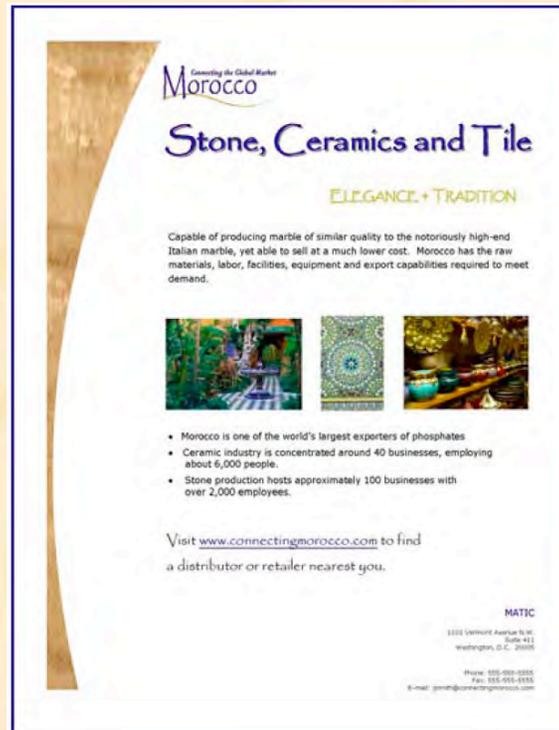
Moroccan leather craftsmen provide the latest innovations in high-quality unprocessed and semi-processed leather goods. Two leather training institutes training in the renowned Italian craftsman style, provides a competitive edge over other leather producing countries.



- \$141 million exported in 2004.
- \$16.9 million directly invested to grow industry in past year.
- Over 330 companies employ 16,000 workers.
- Highly adapt inexpensive craftsmen available.

Visit www.connectingmorocco.com to find a distributor or retailer near you.

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Morocco

Stone, Ceramics and Tile

ELEGANCE + TRADITION

Capable of producing marble of similar quality to the notoriously high-end Italian marble, yet able to sell at a much lower cost. Morocco has the raw materials, labor, facilities, equipment and export capabilities required to meet demand.



- Morocco is one of the world's largest exporters of phosphates
- Ceramic industry is concentrated around 40 businesses, employing about 6,000 people.
- Stone production hosts approximately 100 businesses with over 2,000 employees.

Visit www.connectingmorocco.com to find a distributor or retailer nearest you.

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Sales Tool Box



Connecting the Global Market
Morocco

Wood Products

EXOTIC + RELIABLE

Morocco's architectural and furniture-making traditions have included woodcraft techniques such as sculpture, engraving, turning, carving, painting, illumination, marquetry, inlay, leather covering, stud-work and others. Employing craftsmen who specialize in areas of joiners, wood sculptors, wood turners and painters, marquetry workers, wooden-chest makers, etc. Morocco's primary wood exports are exotic in nature: cork, cedar, evergreen, oak, thuya, argan, and eucalyptus and command a higher price than commodity woods.



- \$75 million in wood and forest products exported in 2002.
- U.S.-Morocco FTA provides that wood product imports are immediately eligible for duty-free treatment.
- Banking System offers inexpensive capital for wood production enhancements.

Visit www.connectingmorocco.com to find a distributor or retailer near you.

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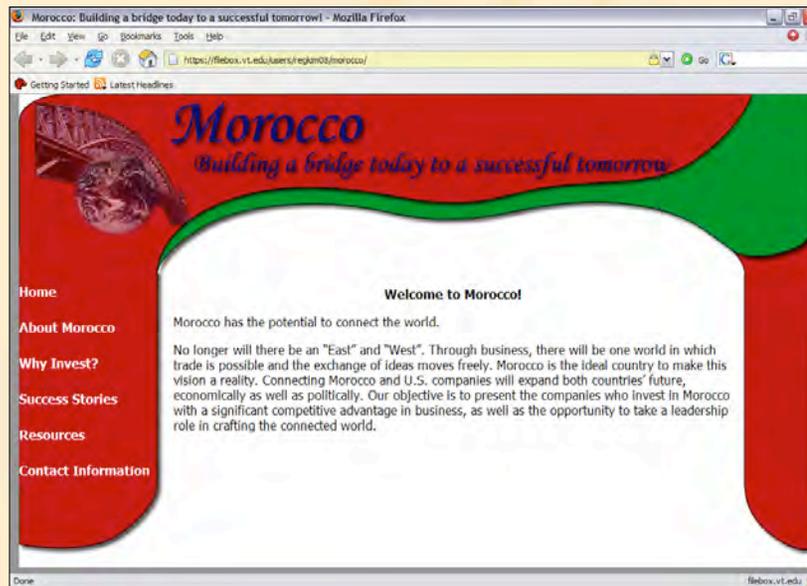
Virginia Tech Highlights

Textiles/Apparel

Approach:

- I. Develop umbrella brand
 - Can encompass all industries
 - Provides consistent, coherent message
 - Accommodates growth/expansion
- II. Start focused, and grow
 - Target textiles sector
 - Micro-target “technical textiles”

*Building a bridge today...
To a successful tomorrow*

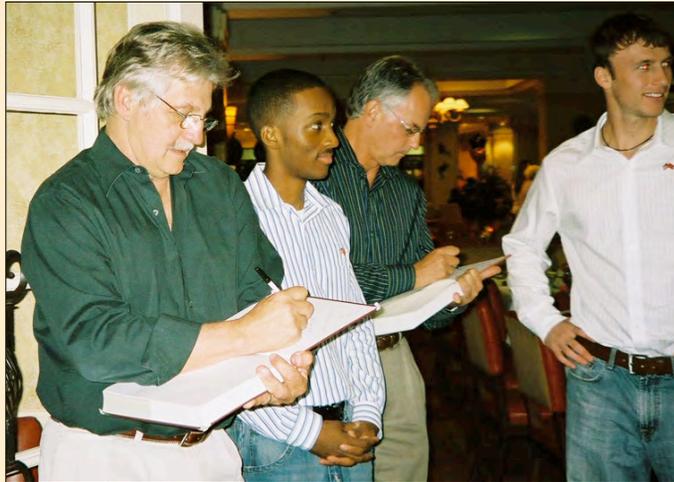


Media Plan:

Component

- Internet Advertising
 - Web site
 - Per Click Advertising
- Print Advertising
 - National Publications
 - Industry Publications
- Trade Shows
 - Technical Textile & Manufacturing
- Press Releases

San Diego Presentations



Left: Dr. Mickey and George Belch autographing their IMC textbook for students

Right: Dr. Ted Smith with students



Above: Adil Embarch and Amine Maouni visiting with student



Above: Jean AbiNader and Rashid Choufani with students



Left: Mr. Tony Sgro visiting with students

San Diego Presentations

On December 15, 2006, five (5) teams were invited to the Centre for IMC headquarters at San Diego State University to present to MATIC senior executives, industry experts and the Centre for IMC.



Bellevue University

1st place - \$3,000 and trip to Morocco



Johnson & Wales University

2nd place - \$2,000



Virginia Tech

3rd place - \$1,000



Indiana University, South Bend



Cascade College

Media Hits - United States

Looking to put the cash in Casablanca

Marketing | PSU students team up with Morocco to boost the struggling nation's business appeal among Americans

By JONATHAN BRINCKMAN
THE OREGONIAN

A marketing class at Portland State University has taken on an unlikely assignment: Helping Moroccan business leaders sell their North African country in the United States.

It's not just an academic exercise. It's for real.

Twenty-three students listened attentively this week in a PSU classroom as a man working on behalf of the Moroccan government outlined the students' mission. "Moroccans don't understand how to penetrate the U.S. market," said Jean AbiNadar, managing director of the Moroccan American Trade & Investment Council. "I need your help."

AbiNadar stood between an American and a Moroccan flag, opposite a table of Moroccan treats: dates, cookies and mint tea with orange honey. The ethnic food is as close as most of the students will ever get to Morocco, an economically weak country with a population of 33.2 million.

Bethany Jones, a PSU senior, said later that she was thrilled by the unlikely assignment that could help a poor nation with a per-capita gross domestic product just one-tenth that of the United States.

Please see **MOROCCO**, Page A5



The straight line distance between Portland and Casablanca is about 5,637 miles or 9,072 kilometers.



Jean AbiNadar, managing director of the Moroccan American Trade & Investment Council, speaks to a Portland State University class last week.

JONATHAN BRINCKMAN
THE OREGONIAN

Morocco: Marketing class will produce DVD

Continued from Page One

"Like many college students, I hadn't given Morocco any consideration before," she said. "To be asked to help them enter into the American sphere is just amazing."

The Marketing 443 (Advertising Campaigns) class taught by Don L. Dickinson will produce a 12-minute DVD on "Brand Morocco" for presentation to Moroccan government agencies, trade associations and businesses. The DVD, based on earlier studies by 25 classes at several colleges, will summarize the best marketing strategies recommended for Morocco.

A California consultant who

specializes in linking corporations with university marketing programs chose the PSU class based on his past work with Dickinson.

"I could have picked any school in North America," said Tony Sgro of edVenture Partners. "I picked Dickinson's class because I knew they'd be professional, responsible, creative — and would wow the client."

Dickinson will fly to Morocco in May to present the DVD and give three talks on Integrated Marketing Communications as a way to market a country.

Jones is confident that the DVD will be good. "We have a lot of synergy in our class, and I know we can do excellent work together," she said. "We felt so honored and proud that Portland State University was chosen."

Why use a college class for the project? "It's cost effective and taps the creative energy of young people," AbiNadar said.

Jonathan Brinckman: 503-237-6190;
jbrinckman@news.oregonian.com

Media Hits - United States

Portland State | News | Moroccan Trade Groups Taps PSU Advertising Class to Help "Brand" Morocco

06/26/2007 11:16 PM

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 News: Moroccan Trade Groups Taps PSU Advertising Class to Help "Brand" Morocco
 Author: Angela D. Abel, Office of University Communications, 503-725-8794
 Posted: March 30, 2007

Students from Portland State University's National Advertising Class have been chosen by the Moroccan American Trade & Investment Council (MATIC) to help with the next step in a comprehensive campaign to brand the country of Morocco.

Part of the "Brand Morocco" program was a competition held among universities in the U.S. and Morocco, during fall 2006. Students studied the country and then created advertising campaigns designed to increase awareness of Morocco as a good place for manufacturing, distribution and information technology investments. The next step of the project is to educate Moroccan government officials and its business community about integrated marketing communications.

"That's where PSU comes in," said Jean AbiNader, MATIC executive director in Washington, D.C. "We need a very creative presentation of advertising ideas plus someone to show our people how valuable a well integrated advertising and promotions campaign can be to Morocco's economic future. PSU distinguished itself in the student competition and the Advertising Management program at PSU is highly respected."

The PSU class, under the guidance of Don Dickinson, director of Advertising Management, will produce two pieces for a major economic forum to be held in Morocco in late May. Dickinson will travel to Morocco to present the student work and to conduct multiple workshops on country branding and marketing.

Jean AbiNader will visit the Portland State class to brief the class on the assignments April 4, 2007, at 6 p.m. the Urban and Public Affairs building, room 302 (506 SW Mill St.). Media interested in attending the visit should contact Don Dickinson at 503-725-8533.

Recent PSU student advertising accomplishments include:
 National Cadillac Advertising Competition winner 2004 and 2006
 National Student Advertising Competition, Top 10 Finisher 2004 and 2005

Moroccan American Trade & Investment Council

The Moroccan American Trade and Investment Council (MATIC) is an American based non-profit trade association that assists the country of Morocco in its quest to promote economic growth and stability through the promotion of its private sector. MATIC membership is comprised of leading Moroccan and American firms who share the common vision of Morocco as the focal point for expanding international trade and investment opportunities for both countries. Drawing on this commonality of interests, MATIC has identified several strategies for firms electing to take advantage of the unique location that Morocco provides as a platform from which new business initiatives can be launched. For more information visit

<http://www.pdx.edu/news/13785/>

Page 1 of 2

Bellevue University

06/26/2007 11:08 PM



Award-Winning Marketing Students Travel to Morocco



May 9, 2007

On May 18, a group of Bellevue University Marketing Management students embarked on an all-expenses paid trip to Morocco, where they presented their winning marketing plan to Moroccan trade and tourism officials. The team won the trip by beating out more than 50 other teams from throughout North America.

The team of Nanci Borg, Kelly Carpenter, Cory Kusleika, Aretha Prodjinotho and Jodi Tripp won the Brand Morocco National Case Study Competition, which asked college students to develop a strategic marketing campaign that encourages investment in Morocco and the purchase of Moroccan products.

Teams competing included undergraduates from New York University, Florida State University, University of Florida and George Washington, and MBA students from MIT and Loyola Marymount.

The U.S. Ambassador to Morocco hosted the students and their instructor, Heather Nelson, for the week-long trip. The students also collected a \$3,000 cash prize for winning the competition.

The five students are enrolled in the Marketing Management accelerated bachelor's degree completion program, within the University's College of Professional Studies. Bellevue University also offers an Advertising Management degree program through the College of Professional Studies.

All of the students in Nelson's class created a marketing plan for the Brand Morocco competition. Such a class project epitomizes the learning philosophy of Bellevue University: real-world application of theories learned in class.

<http://www.bellevue.edu/cs/Satellite/bu/bu/buNews/1178048789355/1170175679099>

Page 1 of 2

Bellevue University

06/26/2007 11:08 PM

The Brand Morocco contest is sponsored by the Moroccan American Trade and Investment Council. The recently negotiated Morocco-U.S. Free Trade Agreement, as well as recent changes to the economic landscape in Morocco, has created the challenge of effectively marketing the country to potential American investors and businesses.

Media Hits - United States

Missouri Valley resident among student group to win 2007 trip to Morocco - 12/27/2006 06/26/2007 11:12 PM

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This is what people will click

Bellevue, Neb. - Which College has a group that won an all-expenses paid trip to Morocco to present their marketing plan to local trade and tourism officials? The University of Florida? Nope. Virginia Tech? Wrong. M.I.T.? Try again.

The correct answer is Bellevue University.

The five-person team of Jodi Tripp, Kelly Carpenter, Cory Kusleika, Aretha Prodjinotho, and Missouri Valley resident Nanci Borg put together a presentation that was not only strong enough to win the competition, but realistic enough to get a chance to be pitched to Moroccan officials.

There were two factors that made the spoils particularly sweet. Borg's professor, Heather Nelson, said a total of 62 schools participated, and none of the 12 MBA programs that signed up - including MIT - were selected among the five finalists.

Second, Borg said to consider the other four groups of finalists were all made up of younger, traditional students.

"They're students who go to school during the day," she said. "Our group is made up of nontraditional students, who have to work during the day, plus we have families and other additional responsibilities on top of being full-time students."

In Borg's case, she and her husband would get home from work, eat dinner, feed the animals, and have to do other things before she was able to start her schoolwork.

Often, it would be 10:30 p.m. before I was able to start," she said.

Borg praised Nelson, who "never shot down any of our ideas. There were a couple she teetered on the line with, but she'd ask us if this was doable. She was very supportive."

On December 15, the five finalists presented their campaigns to a panel of judges in San Diego. Borg's team had a marketing plan focused on Morocco's design material industry, which dealt with everything from stone and marble to handcrafted rugs.

The Moroccan American Trade and Investment Council, or MATIC, sponsored the Brand Morocco National Case Study Competition. Not only does it provide students the opportunity to develop a strategic marketing campaign but also allows for real-life application of theories learned inside the classroom.

Nelson said her students had to prepare for marketing implementation, which included sales tool, public relations kits and trade show booths. Each group was given a fictitious budget of \$1 million.

<http://www.bellevueuniversity.info/studentgroupwin2007tripMorocco.html> Page 1 of 2

Missouri Valley resident among student group to win 2007 trip to Morocco - 12/27/2006 06/26/2007 11:12 PM

The recently-negotiated Free Trade agreement between Morocco and the United States effective this year and the lack of American industry there gives any proposal an extra chance to succeed, Nelson added.

"There are currently 96 businesses in the United States that have sites in the African nation," she said. "There's a lot of opportunity there."

All five students, who received a \$3,000 cash prize for winning the competition, are enrolled in Bellevue's accelerated bachelor's program for Marketing Management.

Nelson said her students would make the trip to Morocco in the third week of May for one week, and will be hosted by the United States' ambassador to Morocco. During their stay, the team will pitch its winning project to the country's minister of trade and to the Moroccan organization that represents the design material industry.

While Moroccan officials will likely extrapolate ideas from the projects of the other 61 schools, Nelson said they'll likely use Bellevue's project "as its foundation" for any future plans.

Borg is admittedly a little nervous about taking the trip to Morocco, but she loves that the group's ideas might become reality.

"It's so wonderful to think how our project, our ideas, are going to be heard by the Moroccan officials, and they might use them," she said. "Who knew this would happen?"

@Daily Nonpareil 2006

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<http://www.bellevueuniversity.info/studentgroupwin2007tripMorocco.html> Page 2 of 2

Media Hits - United States

Morocco Travel Articles | Morocco Travel Information | Tours Morocco Information 06/26/2007 11:13 PM

Journey Beyond Travel - Morocco Tours

... going beyond the destination

Students Win National Morocco Competition

27/12/06 23:28 | [Morocco Articles](#)

In a national competition focused on developing a small business-marketing plan that could be viable in Morocco, students in Bellevue University have beaten top-ranking schools from California to Massachusetts. And, their grand prize you might ask?

Each group member, made up of non-traditional students who attend school after their working hours, have received US \$3000 and a [trip to Morocco](#) in May of 2007 to present their ideas to tourism officials. The team is made of up Jodi Tripp, Kelly Carpenter, Cory Kusleika, Aretha Prodjinotho, and Nanci Borg. Ms. Heather Nelson, their business professor, claims that it was their team's non-traditional, yet real world approach that greatly her group.

The team ventured to San Diego as a part of the final round in order to present their marketing plan. The team decided that they should focus on Morocco's handicrafts, along with works in stone and marble. The Moroccan American Trade and Investment Council, or MATIC, paid for the competition in order to see what real-world theories might be applied to Morocco.

With only US \$1 million in "fake" money to work with, the team had to construe a plan that took into consideration the Free Trade Agreement that will be implemented over the next several months between the U.S. and Morocco. The students are going to meet the ambassador to Morocco when they visit this May, along with top tourism officials in the country. The group is still surprised at their success and now they are preparing for their presentation that might just impact how future trade and business relations will work between the two countries that have always claimed the other as a solemn "friend".

Brought to you by: [Morocco News](#) by Journey Beyond Travel
Source: Daily Nonpareil 2006

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MISSOURI VALLEY TIMES - NEWS - Bellevue University team wins Morocco trip 06/26/2007 11:15 PM

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Bellevue University team wins Morocco trip

By: 12/27/2006

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A group of Bellevue (Neb.) University Marketing Management students beat out more than 50 other teams from throughout North America and won an all-expenses paid trip to Morocco, where they will present their winning marketing plan to Moroccan trade and tourism officials. The team of Nanci Borg, Kelly Carpenter, Cory Kusleika, Aretha Prodjinotho and Jodi Tripp won the Brand Morocco National Case Study Competition, which asked college students to develop a strategic marketing campaign that encourages investment in Morocco and the purchase of Moroccan products. Borg is a Missouri Valley resident. More than 50 teams entered the competition, including undergraduates from New York University, Florida State University, University of Florida and George Washington, and MBA students from MIT, Loyola Marymount and Virginia Tech. December 15, teams from Bellevue University and four other schools advanced to the finals, held in San Diego. The teams presented their campaigns to a panel of judges, who announced Bellevue University the winner later that day. This spring, the Bellevue University students - along with their instructor, Heather Nelson - travel to Morocco to present their plan to the country's minister of trade and other trade officials. The U.S. Ambassador to Morocco will host the Bellevue University contingent for the week-long trip. The students also collected a \$3,000 cash prize for winning the competition. The five students are enrolled in the Marketing Management accelerated bachelor's degree completion program, within the University's College of Professional Studies. Bellevue University also offers an Advertising Management degree through the College of Professional Studies. All of the students in Nelson's class created a marketing plan for the Brand Morocco competition. Such a class project epitomizes the learning philosophy of Bellevue University: real-world application of theories learned in class. The Brand Morocco contest is sponsored by the Moroccan American Trade and Investment Council. The recently negotiated Morocco-U.S. Free Trade Agreement, as well as recent changes to the economic landscape in Morocco, has created the challenge of effectively marketing the country to American investors.

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Morocco Trip



Amin Maaoui Presenting



Al Akhawayn University



News Interviewing Bellevue Student



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Riad in Fès



Tour of Fès Souq



Wali of Fès



Tea Man in Rabat



Presentation to Moroccan Government Officials



Wali of Kenitra



Rick's Café



Traditional Moroccan Dinner

INVESTISSEMENT

5

LE MATIN • JEUDI 24 MAI 2007

ÉCHANGES ÉCONOMIQUES AVEC LES ÉTATS-UNIS

INTERVIEW AMINE MAAOUNI, Business Development Coordinator au MATIC

«Mettre le Maroc sur le radar américain»

Orchestrer stratégiquement et de manière plus cohérente les différents outils de communication

PROPOS RECUEILLIS PAR BENSEMAIL FENNASSI

LE MATIN : Moroccan American Trade and Investment Center (MATIC) vient de présenter le programme «Brand Morocco». Quelles sont les principales conclusions de cette étude ?

AMINE MAAOUNI : Le programme Brand Morocco s'est déroulé en deux étapes. La première, la phase de recherche, avait pour but de jauger la perception qu'ont les entreprises et les preneurs de décision américains du Maroc. Compte tenu des résultats observés, MATIC a décidé de mettre en place la deuxième phase du programme, à savoir une étude de cas du «Brand Morocco» afin d'évaluer l'impact de la communication intégrée (IMC-Integrated Marketing Communication) pour répondre de manière plus dynamique aux besoins en communication et aux nouveaux enjeux de communication.

Ce n'est un secret pour personne, les Américains ne connaissent pas le Maroc.

Entre 64 et 90% des businessmen sondés connaissent très peu de choses sur notre pays voir pas du tout. De plus, plusieurs fausses idées reçues circulent dans les milieux d'affaires américains. Pour s'en citer que quelques-unes, on perçoit le Maroc comme un pays ancré au fin fond du Moyen-Orient, un désert difficile d'accès avec un environnement économique et social très pauvre et sous-développé. Notre étude a réellement fait ressortir les éléments clés sur lesquels il faut communiquer. D'ailleurs, le plan IMC vainqueur propose une solution clé en main pour véhiculer l'image du Maroc en tant que véritable plateforme régionale et destination économique de premier choix.

La perception de l'image du Maroc par les Américains est d'autant plus importante vu l'accord de libre-échange en place. Comment, à travers l'image, le Maroc peut-il tirer profit de cet accord ?

Tout d'abord, il faut garder en tête que pour les Américains, un accord de libre-

échange n'est pas un avantage tarifaire, l'accord de libre-échange maroco-américain leur offre un environnement de travail plus sûr. Nous pouvons citer comme exemple le volet de la propriété intellectuelle et commerciale, ou encore le cadre juridique pour résoudre d'éventuels conflits commerciaux. Ainsi, communiquer

“
Ce n'est un secret pour personne, les Américains ne connaissent pas le Maroc.”

La mise en œuvre d'un plan de communication intégré est une nécessité impérieuse. Pourquoi une telle affirmation ?

Comme je vous l'ai dit, aujourd'hui, le Maroc n'est pas sur le radar des entreprises américaines parce qu'elles ne savent pas ce que peut leur offrir le royaume et ne sont pas informés sur les potentialités de ce dernier. Cette désinformation est majoritairement due à trois facteurs.

Tout d'abord au manque d'informations claires, récentes et en anglais sur les sites

web marocains. Ensuite, à la manière avec laquelle l'information est délivrée. Et finalement au fait qu'aujourd'hui les décideurs américains assaillis de messages de différentes natures et provenant de différents canaux à tel point qu'ils ne sont plus vraiment sensibles à ces messages.

“
Ce n'est un secret pour personne, les Américains ne connaissent pas le Maroc.”

La mise en œuvre d'un plan de communication intégré est une nécessité impérieuse. Pourquoi une telle affirmation ?

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Tout d'abord au manque d'informations claires, récentes et en anglais sur les sites



Amine Maaouni

ont mis en place le concept de plan de communication intégré pour mieux répondre à ces nouveaux enjeux. Il s'agit d'orchestrer stratégiquement et de manière plus cohérente les différents outils de communication incluant des nouveaux supports de communication

afin d'augmenter l'impact de notre message au niveau de notre cible. Aujourd'hui, nous pensons donc dire que le IMC est une nécessité, et l'étude que MATIC a réalisée prend en compte tout ces facteurs et répond à tous ces nouveaux défis. ■

Les échanges en hausse

Le volume des échanges commerciaux entre le Maroc et les États-Unis a enregistré une hausse de 30% pour atteindre environ 1,2 milliard de dollars, depuis l'entrée en vigueur des clauses de l'accord de libre-échange signé entre les deux pays en 2006, a indiqué, mardi 22 mai à Casablanca, Mme Mounira Roucoca, directrice de Développement de l'Industrie, lors de l'ouverture des travaux d'une conférence organisée par l'Association des professionnels marocains aux USA (AMPA). C'est ainsi que les diverses mesures d'accompagnement des sociétés exportatrices marocaines vers le marché américain ont été mises en exergue.

Pour tirer le meilleur profit des opportunités offertes par le marché américain, l'Etat a procédé, au titre de l'exercice 2006-2007, à la sélection

de 74 entreprises opérant dans les secteurs du textile, du cuir, chaussure, de l'automobile et de la pêche. Cette sélection sectorielle s'articule sur des plans d'export personnalisés, des experts sectoriels, et sur une assistance à la participation aux salons et aux foires internationales américaines, a-t-elle précisé.

Selon des statistiques avancées par le ministère, les exportations des vêtements confectionnés vers les États-Unis ont connu, en 2006, des performances notables affichant une augmentation estimée à 122% en 2006, suivies par les produits de parfumerie qui ont progressé à leur tour de 41%, alors qu'une baisse a été enregistrée au niveau des exportations de phosphates, des poissons en conserve, des conserves de légumes et de l'huile d'olive.



Idées reçues
De plus, plusieurs fausses idées reçues circulent dans les milieux d'affaires américains.

• Économie : "Brand Morocco" un programme pour améliorer l'image du Maroc aux États-Unis



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"Brand Morocco", qui a fait l'objet d'un concours auquel ont pris part une cinquantaine d'universités américaines, a été mis en œuvre pour contribuer à la remise en question de la perception des américains, notamment les investisseurs, à l'égard du Maroc, de créer des rapports personnels entre les hommes d'affaires des deux pays et de promouvoir les produits marocains aux États-Unis.

La rencontre de Rabat, qui a été marquée par la présence de l'ambassadeur des États-Unis au Maroc, M. Thomas Riley, a été une occasion pour présenter le plan de communication intégré (IMC), pour une meilleure stratégie d'attirer les investisseurs extérieurs, de l'université Bellevue d'Omaha (Nebraska), qui a remporté ce concours.

D'un coût d'environ 1 million de dollars, "Brand Morocco" touche plusieurs secteurs dont, l'automobile, l'industrie aéronautique, l'immobilier, l'agriculture, les technologies d'information (offshoring) et les matériaux de décoration.

Intervenant à cette occasion, le ministre de l'Industrie, du Commerce et de la Mise à niveau de l'économie, M. Salaheddine Mezouar a indiqué que ce programme est intéressant dans la mesure où il a été ouvert à la participation de plusieurs étudiants américains et a permis de promouvoir le Maroc au sein de ces universités US.

Cette rencontre, a-t-il souligné, se veut l'occasion de restituer un "travail intéressant" sur la perception de l'image Maroc et sur la construction d'une "marque Maroc" aux États-Unis.

"Brand Morocco" propose une approche tout à fait adaptée aux spécificités et aux réalités du marché américain, a-t-il ajouté soulignant que c'est une conjugaison d'efforts positive sur laquelle il faut travailler pour pouvoir construire cette image, qui est fondamentale dans la relation avec le marché américain.

Ce programme aide à mieux aborder le marché américain avec tous les outils marketing utilisés et proposés, a-t-il noté ajoutant que le "MATIC" ouvre pour attirer l'intérêt des investisseurs américains.

Le fait de susciter déjà la curiosité est un pas important vers la consolidation des relations en matière de commerce ou d'investissement, a précisé M. Mezouar.

M.A.P.

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Media Hits - Morocco

L'Economiste 06/22/2007 03:01 PM

Maroc-USA: Des «old friends» en phase de renouer

- Jusqu'à 88% des Américains ne connaissent pas le Maroc
- 1 million de dollars pour un programme destiné à faire connaître l'artisanat
- 33 millions d'impressions totales à recueillir

«Le Maroc est un grand désert», «Le Maroc est un pays instable sur le plan politique», «Il se trouve au Moyen-Orient». Non, ce ne sont pas des spéculations de gens incivilisés, mais ces affirmations émanent de personnalités du monde des affaires de la première puissance économique mondiale, les Etats Unis d'Amérique. Ainsi, les Américains ne connaissent pas bien notre pays. Ils n'ont qu'un seul cliché en tête, celui d'Humphrey Bogart dans le célèbre film des années 40 «Casablanca». «Il faut dire que l'effet Casablanca induit en erreur beaucoup de gens connaissant mal l'actualité de notre pays», tient à signaler Amine Maouini, coordinateur business développement au Moroccan American Trade and Investment Center (MATIC).

En effet, selon un projet de recherche universitaire (Etats-Unis, Canada, Maroc), de 64 à 88% des personnes sondées dans le monde des affaires américain connaissent très peu ou pas du tout le Maroc. Pour certains, le pays n'évoque qu'une destination de vacances et pas plus. Il faut préciser que les investisseurs marocains, faute d'informations pertinentes ou dispersées, ratent les opportunités d'affaires au Maroc, ce qui constitue un réel manque à gagner pour l'économie nationale. Et c'est justement dans le but d'améliorer la notoriété du Maroc et de promouvoir son image auprès des businessmen américains que Matic avec près de 50 universités américaines ont mis en place un programme visant à étudier la perception des hommes d'affaires des USA du Maroc et de proposer par la suite un plan de communication appropriée.

Parmi les 50 universités qui ont proposé leur projet, l'université vainqueur a été dévoilée à Rabat le 21 mai lors d'une présentation tenue conjointement par le Matic et le ministère de l'Industrie. L'université de Bellevue au Nebraska était la gagnante avec son programme, stratégie et recommandations. Son projet, axé sur l'artisanat, a été sélectionné parmi d'autres dédiés à des secteurs comme le textile, l'industrie de fabrication des

http://www.leconomiste.com/article.html?a=78550 Page 1 of 3

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composantes électroniques et mécaniques, les NTIC ou l'agroalimentaire. L'étude, menée par des étudiants déjà acteurs de la vie professionnelle a entamé pour commencer la perception actuelle de l'image du Maroc auprès des investisseurs américains. Les résultats ont démontré que ces derniers jugeaient la communication faite par le Maroc insuffisante ou dépassée. Certains ont reproché aux parties concernées la dispersion des canaux de diffusion des informations.

Ensuite, les gagnants ont présenté la partie des recommandations. Les universitaires ont choisi comme positionnement «Old friends, new opportunities», en référence aux liens d'amitié historiques liant les 2 pays, sans oublier l'accord de libre-échange. La population ciblée est composée de professionnels du secteur comme les architectes, les constructeurs et les designers d'intérieur entre autres. Détenteurs de diplômes universitaires, les candidats doivent être âgés de 40 à 70 ans et disposer d'un revenu moyen annuel de 75.000 dollars.

Le budget alloué à ce projet consistant à faire connaître l'artisanat marocain et étendu sur un an, est estimé à un million de dollars, selon Jodi Corkusleika, membre de l'équipe de l'université de Bellevue. Le montant paraît important, mais s'il est pris en charge par une association professionnelle ou même par la CGEM, les coûts seront vite répartis», estime Maouini.

Pour appliquer le projet, l'équipe a choisi d'organiser des expositions dans les plus prestigieux musées américains comme le Field Museum dans l'Etat de l'Illinois. Des conférences, des mailings, des rencontres avec la presse, des tombolas et des foires sont également programmés. Bref, tout est planifié de sorte à susciter l'intérêt d'un maximum de personnes. Un site web, www.connectingmorocco.com, a été créé à cet effet. «Nous avons essayé d'offrir un tour au Maroc à travers ce site», tient à signaler Kelly Carpenter, membre de l'équipe du projet. Il présente les relations maroco-américaines, un agenda des rencontres et foires et les produits marocains fabriqués en pierre ou en céramique entre autres.

Ce projet devrait, selon ses concepteurs, atteindre le maximum de personnes avec les expositions. Les foires devraient ouvrir le dialogue entre les professionnels du secteur et le site internet et fournir de l'information pertinente aux potentiels investisseurs américains. Ainsi, avec cette campagne bien ficelée, près de 33 millions d'impressions totales devraient être recueillies.

Brand Morocco programm

Il devient urgent pour le Maroc de dépoussiérer son image et de mettre en avant la qualité de ses services et produits. Qu'il s'agisse de l'offshoring, l'immobilier touristique, l'industrie, le Matic tente de promouvoir l'image du Maroc en tant que plate-forme d'affaires et surtout, de mettre l'accent sur les implantations réussies de certaines entreprises comme Nexans ou Pfizer. Sponsorisé par le Matic, le but du projet Brand Morocco est de développer un programme de Communication Marketing Intégrée (IMC) qui établira et

http://www.leconomiste.com/article.html?a=78550 Page 2 of 3

06/22/2007 03:01 PM

pérenniser une identité de marque pour le Maroc comme étant un lieu idéal pour les fonds d'investissements directs (FDI) Américains et internationaux. La 2e phase est en cours et a consisté au développement de divers plans d'IMC afin de traiter les opportunités et les menaces identifiées dans l'étude de marché.

Sara BADI

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Demanio:re - 'Brand Morocco' set to woo American markets

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WORLD FORUM

MOROCCO

'Brand Morocco' set to woo American markets



(ANSA) - CASABLANCA - 'Brand Morocco ' is the new programme aimed at improving and promoting the image of the country to the American companies. It was presented yesterday in Rabat by Moroccan American Trade and Investment Council (MATIC) and Morocco 's Ministry of Industry, Trade and Economic Restructuring.

The programme, the subject of a competition involving some 50 American universities, was elaborated to contribute to improving the view which American investors have about the North African country, to create new relations between the businessmen of the two countries and to promote the Moroccan products in USA.

The meeting of Rabat was also an occasion to present the plan to attract foreign investments in Morocco , elaborated by the Bellevue University of Omaha (Nebraska), which won the competition.

With an investment of USD1 million, 'Brand Morocco ' acts in different industries, from the car industry, aeronautics, hardware and software industry, to agriculture and real estate.

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Morocco : "Brand Morocco" program ready to charm American markets le 28-05-2007

'Brand Morocco' is the new programme aimed at improving and promoting the image of the country to the American companies.

According to ANSAmed:

"It was presented yesterday in Rabat by Moroccan American Trade and Investment Council (MATIC) and Morocco's Ministry of Industry, Trade and Economic Restructuring. The programme, the subject of a competition involving some 50 American universities, was elaborated to contribute to improving the view which American investors have about the North African country, to create new relations between the businessmen of the two countries and to promote the Moroccan products in USA. The meeting of Rabat was also an occasion to present the plan to attract foreign investments in Morocco, elaborated by the Bellevue University of Omaha (Nebraska), which won the competition. With an investment of USD1 million, 'Brand Morocco' acts in different industries, from the car industry, aeronautics, hardware and software industry, to agriculture and real estate."

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AMCHAM NEWS

Moroccan-American Bridges conference generates rich debate and top-notch networking opportunities

Topics ranging from real estate to offshoring attracted more than 80 participants to the two-day *Moroccan-American Bridges* conference held at the Casablanca Technopark on May 15-16.

The second edition of the event was co-organized by AmCham and the Association of Moroccan Professionals in America (AMPA), with the commerce students association AIESEC co-organizing a student business plan contest held in Rabat on May 14.

Topics debated in the conference sessions included an evaluation of the first year of the bilateral free trade agreement (FTA), the real estate sector, franchising, and information technology and offshoring. Evening networking cocktails and dinners were organized with the Al Akhawayn University Alumni Association and the local chapter of the Young Presidents' Organization.

United States Consul General Douglas Greene was a keynote speaker at the inaugural session of the conference, which featured thought-provoking presentations and animated debate across all four of the chosen themes.

Michael Blakeley of the USAID-funded New Business Opportunities



U.S. Consul General Douglas Greene, keynote speaker at the Moroccan-American Bridges Conference.

program, speaking during the FTA evaluation session, warned Moroccan firms that the tariff reduction brought by the FTA was not always enough to be competitive in the United States, and that a breakthrough may also depend on quality, after-sales service, and competitor pricing.

Key selling points for Moroccan firms were the diversification of sourcing for U.S. partners, and speedy delivery by air (via Casablanca/New York direct flights) and maritime transport (when the Tangiers Mediterranean port becomes operational), Mr. Blakeley said.

Résumé en français

Des thèmes allant de l'immobilier à l'offshoring ont attiré plus de 80 participants à la deuxième édition de la conférence *Moroccan-American Bridges*, tenue le 15 et le 16 mai au Technopark de Casablanca et marquée par des débats riches et francs. Cette manifestation co-organisée par l'AmCham, l'Association des professionnels marocains aux Etats-Unis (AMPA), et l'AIESEC, s'est également penchée sur le franchising ainsi qu'une évaluation de la première année de l'accord de libre-échange bilatéral.

"Tariff reduction brought about by the FTA is not always enough to be competitive in the United States... a breakthrough may also depend on quality, after-sales service, and competitor pricing"

Brand Morocco promotion strategy presented by MATIC

A *Brand Morocco* strategy for the promotion of Morocco as a trade and investment destination for the United States was presented in Rabat and Casablanca on May 21 and 22.

The strategy was the winning entry in a competition between teams of students from 49 universities in the United States and Morocco that was organized by the Moroccan-American Trade and Investment Center (MATIC).

The competing strategies were intended to remedy a lack of awareness of Morocco among U.S. entrepreneurs that had been identified in a survey prior to the competition.

The integrated marketing communications strategy of the winning team from Bellevue University (Omaha) focused on stone, leather and handicraft products, although the competition also covered agribusiness, IT, and aircraft and automobile parts.

AmCham Executive Director Carl Dawson participated in a round table debate following the presentation.

Résumé en français

Une stratégie promotionnelle pour le Maroc en tant que destination d'investissement et partenaire commercial

aux yeux des entrepreneurs américains a été présentée à Rabat et à Casablanca le 21 et 22 mai.

Cette stratégie, qui a remporté une compétition entre 49 universités américaines et marocaines organisée par le Centre maroco-américain pour le commerce et l'investissement (MATIC), concerne les produits en pierre, le cuir et l'artisanat, bien que d'autres propositions en lice traitait l'agro-alimentaire, les NTI et les pièces détachées automobile et aéronautique.

Carl Dawson, Directeur Exécutif de l'AmCham, a participé à une table ronde suite à cette présentation.

Recommendations

Below are recommendations for case study competitions with countries/kingdoms, if repeated:

1. Separate the undergraduates from graduates. Have either two levels for the competition or require the graduates to conduct additional work in order to create a level playing field.
2. Be more specific with the requirements. Determine exactly what is of high importance (i.e. creative, strategy, etc.) and mention to classes in beginning. More weight needs to be placed on the scorecard in that specified area.
3. Less industries. The case study was difficult to write and manage with so many industries. Students were also unsure whether to keep the focus on the broad industry or get sector specific (i.e. High Tech vs. Call Centers).
4. Equal number of participants per industry. Professors would register and it appeared the industries had an equal amount of schools participating. Once campuses dropped out, there was a large number of teams in certain industries and low amounts in others.
5. A few faculty and students mentioned it would have been helpful to conduct conference calls throughout the semester with either EVP or the client. These would be voluntary and an opportunity for Q&A. The call could be recorded and posted to the Web site so all participants could access.

Program Feedback

During the Brand Morocco National Case Study Competition, what were the key things you learned/ discovered about the Kingdom of Morocco?

“That it is the new land of opportunity! Who knew?” - Student, UTSA

“They are definitely working hard in upgrading the perception of the country and are willing to open themselves up to investment opportunities with other countries. I also learned it is challenging to develop a marketing concept for a country that you are unfamiliar with.” - Student, Indiana University, South Bend

“As much as we as students were 'selling' the advantages of Morocco, our group discovered many underlying problems that still exist in this nation...these issues need to be addressed in order for expansion of trade to become a reality.” - Student, Ryerson University

“Hadn't realized their specialty in food and textiles. Furthermore, the ongoing efforts of females to take part in all aspects of business, education, and government within their country.” - Student, Ryerson University

“That Morocco was really not too far behind the rest of the world as I had previously thought. Also, I had a completely different view of how Morocco should have been as opposed to what it actually is now.” - Student, Virginia Tech

“Everything - that it's making an incredible effort to stand out among other emerging markets, that it has a very rich history, is attempting to modernize, etc. The competition itself helped to make Morocco stand out to all business students in general (in itself, it's a cool marketing strategy).” - Student, NYU

“In all honesty, we were very uneducated about Morocco. I learned a lot about the history, the resources, and the current status of the country. Morocco was a stone yet to be over-turned, and this project helped to give an insightful description of what this country actually is.” - Student, Florida Southern University

In your opinion, how does this case study compare to other case studies?

“Same as most. This competition was really NOT the same as most. It was neither better nor worse, just different. Most case competitions require the student teams to travel to venue to compete. So this was interesting in that just the written document went on. I think the students got a lot out of this competition.”

- Professor Scott Ensign, University of Ottawa

“Better than most. It was a real-live situation, not a dead-case from the past.” - Professor David Moulton, Douglas College

Program Feedback

What would you consider a weakness of the Brand Morocco National Case Study Competition?

“The complexity of the case was a stretch for an undergraduate general business program.” - Professor Pam Mickelson, Morningside College

“I was surprised at the lower quality of the other written submissions viewable. I was also expecting the final work to contain more creatives, showcasing the communication plan components versus just a traditional marketing plan” - Professor Heather Nelson, Bellevue University

“This was probably my favorite case so far, so I'm hard pressed to think of a real weakness.” - Professor Tim Hatten, Mesa State College

“Lack of time for the students to prepare better. It was a race to get done with the case and still cover class material. I think I was at fault here, but I also did not realize exactly what the focus was. We missed one area on the case because we didn't know that was to be included. More clear instructions on the audience and goals (in this case, I think it was downstream links) would be helpful.” - Professor Chip Miller, Drake University

“Honestly, grouping Grad and Undergrad. More important, while I had insight in the case, I found that the directions we were given were misdirected. We focused on a specific part of the food industry and found that the judges did not like this.”
- Professor David Grossman, Florida Southern College

What aspects of the case study competition did you find to be beneficial?

“The entire experience was beneficial.” - Professor Heather Nelson, Bellevue University

“Adding the International component on this case was outstanding - that opened up the whole world of trade barriers, distribution issues, paperwork, exchange rates, etc. to live experience.” - Professor Tim Hatten, Mesa State College

“The case was well-designed, well-developed, and well-presented.” - Professor Mike Griffith, Cascade College

Any additional comments about your overall experience?

“LOVED IT!!! There is no other way for students to get actual, live, international, B2B and B2C research AND strategy experience in one project. The possibility of travel is a HUGE motivation. When I came in with passport application forms on the first day of class stating that was the expectation level - I had their attention and the fuse was lit.” - Professor Tim Hatten, Mesa State College

Program Feedback

Did the Brand Morocco National Case Study Competition meet your expectations?

“Yes, The students were required to think about something that had real data attached, and secondary sources. They also had to compete for business against other "companies", which I liked.” - Professor Chip Miller, Drake University

“Yes. It was challenging, educational, and I was satisfied with the outcome.” - Student, NYU

“Yes. I didn't really have many expectations going into this, as I had never been a part of anything like this. It was a good educational experience overall...One thing is for sure, whenever I hear the name Morocco throughout the rest of my life, this experience will come to mind. Every marketing class should have opportunities like this...it is much more valuable having a real world assignment that has potential for assisting businesses and nations, than a generic assignment for a grade.” - Student, Bellevue University

“Yes. It exceeded my expectations. I did not know what to expect going into the competition. Now I feel that I can take on any challenge that comes my way because I succeeded in this competition.” - Student, University of Florida

What resource(s) would help in the future, that was not provided?

“A little more evidence that Morocco really is a modern, 21st century country would have helped - we spent a LOT of time trying to build a case to break the Casablanca Effect. I'm not sure how well that worked.” - Professor Tim Hatten, Mesa State College

“More information about the best media outlets for B2B targets.” Professor Tina Lowrey, UTSA

“Full access to B2B research databases to order to obtain 'real' business information. Our group found that we hit a number of 'brick walls' in our research, all because a number of on-line directories required registration for a fee.” - Student, Ryerson University

“American or Moroccan embassies, organizations, firms in the correspondent industries, more specific or detailed information about each sector.” - Student, UTSA

“A bit more knowledge about regulations, policies, and procedures of the USA that may be different than here in Canada if Canadians are also involved.” - Student, Cape Breton University

1. Case Study Overview
2. Case Study
3. Round 1 Scorecard
4. San Diego Scorecard
5. San Diego Presentation Agenda

Case Study Overview

BRAND MOROCCO: DRIVING U.S. INVESTMENT IN MOROCCO



On July 22, 2004, The United States Senate, by a vote of 85 to 13, approved the Morocco-U.S. Free Trade Agreement. As of January 1, 2006, when this agreement went into effect, 95% of the commercial and industrial trade between the two countries is now free of tariffs. In light of this agreement, His Majesty King Mohammed VI of Morocco, promoted the establishment of The Moroccan American Trade and Investment Council (MATIC) which is an American-based non-profit trade association designed to promote economic transactions between the two countries thereby stimulating the growth and stability of Morocco's private sector.

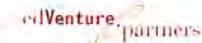
This case will provide students with the unique challenge of helping MATIC develop a strategic marketing approach to encourage U.S. firms to take advantage of the benefits that Morocco provides as a platform from which to launch new business initiatives. Students will be asked to develop a complete Integrated Marketing Communications (IMC) Plan targeted at commercial decision makers in one of five key industries:

1. Information Technology
 - a. Manufacturing, assembly and de-manufacturing of electronics
 - b. IT support
 - c. Software development and programming
 - d. Call center facilities
2. Processed Foods
 - a. Canned
 - b. Dry packaged goods
 - c. Frozen
3. Manufacturing
 - a. Components
 - b. Finished goods
 - c. Semi-manufactured parts
4. Textiles/Apparel Industry
 - a. Production of thread, fiber and fabric
 - b. Design of clothing
 - c. Production of clothing
5. Design Materials
 - a. Stone
 - b. Leather
 - c. Wood products
 - d. Handicrafts

The IMC plan for MATIC needs to take into account key challenges and opportunities:

- Among the target audience of U.S. commercial decision makers, familiarity with Moroccan culture and awareness of Morocco's benefit as a location for offshoring is extremely low
- The target audience has an outdated image of Morocco as a desert oasis or vintage colonial country (i.e., the setting for *Casablanca*) which must be addressed
- Commercial decision makers are C-Level Executives (CEO's, CTO's, CMO's) who are often difficult to reach via traditional marketing communication channels
- Morocco possesses key competitive advantages in each of the industry segments identified. A detailed IMC plan will center on highlighting and communicating these advantages
 - The IMC plan needs to focus on high-level benefits that have broad appeal across all members of the chosen target audience
 - To illustrate these benefits, each IMC plan should utilize examples of success stories of companies that have established business ventures in Morocco

BRAND MOROCCO: DRIVING U.S. INVESTMENT IN MOROCCO



Student Task

This task requires analysis of existing primary and secondary research as well as the development of an IMC plan.

- I) For your chosen industry segment, review the research provided in this case and on the Brand Morocco Website.
 - Morocco's Culture, economics and history
 - What economic incentives does Morocco offer that would appeal to the target audience?
 - What aspects of Moroccan culture would be beneficial to the target audience?
 - How do Morocco's geographic location, political environment, and business environment affect potential new business ventures?
 - Target audience
 - What are the defining characteristics of the target audience?
 - What are the target audience's perceptions of Morocco?
 - What specific beliefs and attitudes must be overcome and changed in order to move beyond existing barriers to consideration?
 - Pay special attention to overcoming the outdated "desert oasis, undeveloped" images of Morocco
 - What are they seeking from a business partnership with Morocco?
 - How can Morocco's assets be leveraged to show they provide the benefits the target segment seeks?
 - Competition
 - In your specific industry segment, what countries are in the competitive set for Morocco?
 - What are the strengths of the competition? Why are businesses attracted to these locations?
 - How can Morocco's competitive advantages be leveraged against the competition's strengths?
 - Success stories
 - What examples exist of companies launching successful ventures in your chosen industry?
 - How might these examples be used to illustrate the benefits Morocco offers?
- II) Design an integrated marketing communications plan targeted at commercial decision makers (C-Level Executives) in the industry you have chosen. The goal of the plan is to reach your chosen target audience segment, increase their awareness of Morocco and prompt them to consider Morocco as a place to initiate a business venture.

Your plan should include:

 - Background/situation summary
 - Competitive overview
 - Target market profile
 - Include defining characteristics in addition to attitudes and beliefs about Morocco
 - Overall marketing objective
 - Include an explanation of the brand equity and image you are building for Morocco
 - Develop key marketing messaging about Morocco
 - Marketing tactics, which may include but are not limited to:
 - Advertising: traditional and non

Case Study Overview

BRAND MOROCCO: DRIVING U.S. INVESTMENT IN MOROCCO

edVenture partners

- Public Relations
- Sales collateral and/or face-to-face presentation materials
- Events/promotion/sponsorships
- Specific media plan recommendations
- Overall budget
 - The costs of executing your IMC plan should not exceed a budget of \$1million USD annually. This includes all production, creative and media expenses.
 - No monies should be allocated to television or publications aimed at the general public
- Creative execution of all advertising campaigns and writing samples for PR pieces
 - Develop a visual identity and brand identity for Morocco
 - Creatively execute your key marketing message
 - Be sure to utilize existing examples of successful American business ventures currently in Morocco to support your key messaging

Make sure your review of the existing research findings justify your plan elements. Your knowledge of the target audience, situation summary, and competitive analysis should lead logically into your IMC recommendations. Remember, the key marketing message of your plan should appeal to all members of your target audience.

Case Study



BRAND MOROCCO: DRIVING U.S. INVESTMENT IN MOROCCO

Typically, the marketer is faced with the task of positioning a brand of toothpaste or small appliances based on features and benefits. Rarely is one presented with the opportunity to position a country as an entire brand. The recently negotiated Morocco-U.S. Free Trade Agreement (FTA), and substantial changes in the economy and political perspectives of the Kingdom of Morocco, has created the marketing challenge to position the country of Morocco - Brand Morocco - accurately in the mind of potential investors and American businesses.

The Kingdom has embarked on programs to capitalize on its favorable geographic location, material and human resources, and pivotal role among Mediterranean nations. The past few years, Morocco, under King Mohammed VI, has experienced fairly dynamic changes in infrastructure, in internal investment in the economy and its modernization, and in attitudes about Morocco's preferred trading partners and role in the global economy. A sequential step in the positioning of Brand Morocco is to communicate with the American marketplace the opportunities of investing in and partnering with Morocco. A significant element of that goal is to develop an Integrated Marketing Communications Program, a solid IMC, to achieve Morocco's goal for one of the five industrial sectors selected by the Moroccan American Trade and Investment Council (MATIC).

Introduction

Historically, Morocco has been closely aligned with Europe, especially France and Spain. While the Kingdom does not intend to eliminate its trade relationship with Europe, it seeks to become more globally integrated, particularly with the United States. In July 2004, the American Senate, voting 85 to 13, approved the Morocco-U.S. Free Trade Agreement. When the agreement went into effect, in January 2006, 95% of the commercial and industrial trade between the two countries was tariff-free. In light of this agreement, His Majesty King Mohammad VI of Morocco promoted the establishment of MATIC, an American-based non-profit trade association designed to promote economic transactions between the two countries and stimulate the growth and stability of Morocco's private sector.

In order to maximize the impact of the FTA, MATIC is developing a marketing strategy that encourages U.S. firms to view Morocco as a platform from which to launch new business initiatives. The initial MATIC effort to identify the positioning strategy for Morocco involved research into both the industrial sectors that offer potential for trade and investment and the perceptions and attitudes American businesses and consumers have of Moroccan products and services. Ultimately, MATIC will execute a thorough IMC targeted primarily at commercial decision makers to communicate why and how it is advantageous to use Morocco as an offshore business location and economic partner.

To understand the challenge that lies ahead for MATIC, it is useful to explore the background of the FTA, the creation of MATIC, and the current business environment in Morocco. The following sections will sketch this background, and provide an assessment of the competitive landscape, target audience, and competitive strengths for Morocco.

Morocco-U.S. Free Trade Agreement. The Kingdom of Morocco and the United States of America have enjoyed a long and enduring relationship with Morocco being the first nation to acknowledge the new country of the United States in 1776. The Sparta-Lighthouse Moroccan-U.S. Treaty of peace and friendship, constituting the longest unbroken treaty relationship in U.S. history, was negotiated in 1865. However, due to its location in North Africa just across the straits of Gibraltar from Europe and colonization over the centuries by France and Spain, Morocco has traditionally traded and interacted



predominantly with Europe. Currently in place are the Barcelona Agreement and the EU Association Agreement, both in operation for more than a decade, which have connected Morocco's economy to those of the EU and the Mediterranean Basin. To date, the American marketplace has been fairly remote to Moroccan enterprises and, consequently, the American business community and consumer have known very little of Morocco and its products. The 2006 FTA is a significant step towards Morocco's expansion of trade and investment options beyond its traditional Mediterranean partners and supports its determination to acquire human and technological knowledge from the U.S.

The U.S.A. receives a mere 4% of the Moroccan exports, less than \$400 M, and, in return, exports about \$475 M in products annually to Morocco. In contrast, China sends 21% of its exports to the USA, totaling \$158 B. Still in the initial stages, Morocco is hopeful that the FTA will provide a boost to its economy overall, but particularly and most immediately in certain sectors: Manufacturing, Information Technology (IT), Agriculture and Processed Foods, Textiles/Apparel, and Design Materials industries. In the long run, the FTA has the potential to support and accelerate structural changes that are integral elements of the Moroccan development plan. Key elements of the FTA include:

- Textiles and apparel trade will be duty-free promoting new opportunities for U.S. and Moroccan fiber, yarn, fabric and apparel manufacturing.
- Tariffs on agricultural products such as corn, sorghum, soybeans, wheat, fruits, nuts, frozen vegetables, and poultry will be phased out over five to fifteen years.
- The telecommunications market will be open and competitive, allowing U.S. firms the right to interconnect with former monopoly networks, and build physical networks in Morocco at non-discriminatory, cost-based rates.
- The Moroccan government will actively enforce labor laws that are in accordance with the International Labor Organization (ILO) to ensure that manufacturing industries offer workers an environment that meets international recognized labor standards.
- Moroccan stone and marble, handicrafts, and other popular design materials, commonly exported throughout the world, will be able to enter the U.S. without tariffs.
- Establishment of a secure, predictable legal framework for U.S. companies and investors operating in Morocco. All forms of investment such as enterprises, debt concessions, contracts, and intellectual property will be protected by the FTA.
- Moroccan and U.S. goods are guaranteed transparent and efficient customs administration designed to facilitate rapid clearance.

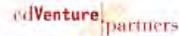
These changes can generate substantial modernization in the Moroccan economy if implemented in a timely and integrated manner. It will not happen automatically and will necessitate enhancing skilled employment in all sectors, from agriculture into the industrial and service sectors, allowing a middle class to thrive in Morocco. The changes also need to be fully communicated to the potential investors, American channel intermediaries, and eventually, to American consumers. King Mohammed VI supported the establishment of MATIC in order to promote the FTA and to educate business leaders in both the U.S. and Morocco about the advantages of participating in shared trade and FDI.

MATIC Background.

MATIC is an American based non-profit trade association comprised of Moroccan and American business firms committed to expanding international trade and developing business investment opportunities. Since its inception, MATIC has worked to develop a strategy to communicate with venture partners and firms interested in the many opportunities for trade and investment in Morocco.

The trade association has embarked on a campaign to communicate the benefits of doing business in and with Morocco. A significant portion of the educational effort has been to attend trade and

Case Study



industry meetings, participate in public forums about trade and investment between Morocco and the U.S., and build individual contacts with senior management of American companies. Representatives from targeted firms and investment banks have been encouraged to visit Morocco and learn firsthand of the opportunities the country offers from its unique location, geography and climate, to the Kingdom's commitment to creating middle-class democracy that competes with many of the emerging "Asian Tigers." Meeting regularly with both American and Moroccan government and trade officials, MATIC is a prominent private sector promoter of the FTA.

MATIC has identified thirteen industry sectors in which Morocco possesses competitive advantages likely to attract foreign business ventures including: pharmaceuticals, tourism, agriculture, call centers and translation, fish farming and processing, movie production, electronics, and renewable energy. Specifically, for in-depth analysis and research into positioning decisions and creation of an IMC, MATIC identified five high potential industries: Information Technology (IT) including call centers, off-shoring, and back office services; Manufacturing, particularly automotive and aeronautics parts; Agriculture and Processed Foods; Design Materials such as stone and marble, tiles, handicrafts, and other materials; and Textiles including fabric, apparel, and fashion design. A problem for Morocco is that the agricultural sector employs 43% of the of the Kingdom's labor force yet produces only about 18% of the GDP. MATIC has focused its development efforts on attracting businesses to industries that enable the nation to increasingly train and educate its young population and deploy them in fields, such as parts manufacturing or multi-lingual call centers, which are not impacted by climatic and seasonal effects. It is in these five industrial groups that MATIC has identified the greatest need for understanding American business' perception of Brand Morocco, its goods, and services. In doing so, MATIC can then develop a strong Integrated Marketing Communications Program to accelerate the Kingdom's economic objectives.

Background of Morocco

Morocco is officially a constitutional monarchy which is a largely secular, moderate Muslim state located in the most northwestern corner of Africa with shorelines on both the Atlantic Ocean and Mediterranean Sea. Its location, just eight miles from Spain across the Straits of Gibraltar has created a unique role for the Kingdom over the millennia as a gateway, geographically and culturally, between North Africa and Europe. Six years of the reign of King Mohammed VI have seen an energetic commitment to modernization, political pluralism, and a sincere goal to expand its enduring relationship with the United States as a key ally in the Muslim world into solid business ties.

History

Morocco is an ancient Kingdom that expanded into Spain in 711 where the Moors maintained their European presence until 1492. Since the 19th century, many European countries attempted to colonize Morocco. While France occupied most of the country from 1912-56 and Spain maintained some protectorates on Moroccan soil, it was never dominated by Europeans in the way most of the rest of Northern Africa was.

In 1956, the sultan was able to negotiate independence from France and became Morocco's first king, establishing a monarchial government which has remained remarkably resilient. He was succeeded by his son, King Hassan II in 1961, a conservative ruler who reigned thirty-eight years. In response to pleas for political liberation, in the early 1970s King Hassan II initiated a "Moroccanization" program that sped the transfer of French-held businesses to Moroccans. This began a series of gradual political reforms that eventually allowed opposition political parties to emerge and their leaders to be brought



into the political mainstream. During the 1990s, economic reforms were given a far lower priority than political reform.

With the death of King Hassan II in 1999 and ascension of his son Mohammed VI, there has been a new style of royal leadership. H.M. King Mohammed VI, the late king's eldest son, is promoting and implementing changes that will reduce social inequalities and instill democratic reform. His efforts to create a more pluralistic democracy, to modernize the social structure of the Kingdom, and his pro-US stance have yielded criticism from Islamist fundamentalists but have helped position the nation to move towards status as an Emerging-Market-Country. On May 16, 2003, Morocco was the target of several suicide bombings perpetrated by Islamic extremists against Moroccans, not tourists, with Al-Qaeda connections. While the King has made the rule of law a high priority since 1999, the government's response to the bombings generated concerns about the resulting civil and human rights violations.

Geography

There are few countries that have as advantageous a geographic location as does Morocco. Much like Turkey, which culturally and geographically bridges two continents, Morocco is the critical link between Africa (especially North, West, and Central Africa) and Europe. The climate and terrain just across the Straits of Gibraltar between Spain and Morocco are very similar. Their cultures have overlapped in many ways in the past 1400 years as well. This proximity to Europe has enabled Morocco to be one of the EU's, significant trading partners (particularly Spain and France). At the same time, Morocco is closely linked with other countries in North Africa and the Middle East, the Francophone nations of Africa that were former French colonies, and other nations in western Africa.

Morocco is slightly larger than the state of California, but the similarity to the largest American state does not end there. The climate is Mediterranean, or Californian, with more extreme conditions in the interior. The northern coast and interior are mountainous with large areas of bordering plateaus. The rest of the country consists of inter-mountain valleys and rich coastal plains. The highest point is in the High Atlas Mountains at an elevation of nearly 14,000 ft. The combination of coast, fertile plateaus, and high mountain peaks are also very similar to the terrain and climate of Chile. However, Morocco, located just a few miles from Spain and only six days by container ship to the United States, has a far superior location in the center of trading routes than does Chile.

Rabat has been the capital of Morocco since 1912 and is second in size only to Casablanca, which is the largest city with a population of 3.74 M. Rabat, with a population of 1.2 M, is a center for critical textile, food processing, and construction industries. Across the river is Salé, Rabat's bedroom community, and together the two cities account for a population of 1.6 M. Both Casablanca and Rabat are located on the Atlantic coast.

Culture

Morocco is a country with a unique culture and civilization woven together over the past one and a half millennia, like many of the beautiful Moroccan textiles, from a blending of different ethnic and tribal groups. Throughout its history, Morocco has hosted people from the East (Berbers, Phoenicians, Carthaginians, Jews, and Arabs), the South (West and Sub-Saharan African tribes), and the North (Romans, Vandals, returning Moors, and Jews). Most of the 32 M people are of Berber origins. The languages of the country include Arabic (the official national language); several Berber dialects, French (which is often the language of business, government, and diplomacy), Spanish, and many educated citizens speak English as well. The majority of Moroccans are Muslim, 98.7%, but the state is secular, not Islamic. For instance there is not the traditional ban on alcohol found in many other Muslim

Case Study



countries, nor do the restrictions on human and animal designs apply in the textile and design industries.

In recent years, especially since H. M. Mohammed VI's ascendancy to the throne in 1999, there has been a substantial commitment to improving the quality of life for citizens. While Morocco is a leading country in the African region in terms of healthcare equipment and services, it lags behind most first-world nations. Whereas life expectancy has increased to 70 years and vaccination is widespread, many indicators, such as maternal and infant mortality rates, remain disturbingly high. In addition, there is limited access to healthcare and poor quality of services in rural areas. Deficiencies in the healthcare sector are compounded by only 15% of the population being covered by insurance.

The literacy rate of Moroccan citizens averages 61%, and discrepancies between the rural and urban areas are substantial. Public education is mandatory from 7 to 13 years of age. Education is free from primary to university level and is generally bilingual with primary instruction in Arabic and French being taught starting from third grade. Both public and private school systems are available in Morocco, and many families will budget to send their children to private schools, particularly to American schools.

Despite efforts to enhance the status and condition of women, gender indicators are far from equal. The disparity is especially stark in rural areas, where a mere 25% of women are literate. In urban areas, the results are better, with a 77% literacy rate for women and with 94.7% of girls enrolled in primary school. Efforts to improve the education of girls and women are currently a priority with the desire to increase their representation in the labor force, in which 35% of women currently participate. Showing signs of progress, today six seats in Parliament are held by women. As a result of discrepancies in income, education, and health care between the rural and urban sectors, there is migration to the cities straining social programs. A well-educated labor force and growing middle class is increasingly a priority of Morocco's economic development.

With the help of the international community, Morocco has embarked on a national human development initiative to greatly improve targeted rural and urban communities in all areas of social and economic development. The US Millennium Challenge Corporation (MCC) is a key contributor to this effort, initiated in 2002 to aid countries that meet political, economic, and social policies that reduce poverty. Morocco's achievement on these criteria have enabled it to benefit from support of the MCC.

Economic Environment

Morocco's mixed economy is one of the most complex and most advanced in Africa. Economic policies brought stability to the country in the early 1990s but the country still faces economic challenges. Despite structural adjustment programs supported by the IMF, the World Bank, and the Paris Club, Morocco faces problems typical of developing countries, such as unemployment and poverty. (See Appendix I, Fig. 1 Morocco Economic Statistical Overview.) As the world economy is increasingly globalizing and other emerging markets have gained a head start on Morocco, the Kingdom has made substantial progress in the past decade toward modernization and seeks partnerships and tech transfers with the United States to accelerate the process.

Structural problems such as a mandatory wage rate and restrictive regulations about recruiting and firing complicate the unemployment issue. Much of Morocco's labor force is unionized and labor conflicts are common. The poverty rate has fluctuated since 2000 due to the volatile nature of GDP. Even a slight change in rainfall typically results in a negative economic impact since a substantial portion of the economy depends on agricultural output. Further, Morocco's continued dependence on foreign energy and difficulties in promoting the growth of small and medium size enterprises present

5



challenges for the nation to overcome. Many of the SMEs in the past have been connected to French businesses and industries and the French economy has experienced a slow or stagnant growth. Consequently, Moroccan development agencies seek to partner domestic firms with American firms and industrial sectors and participate in the higher rate of growth of the American economy.

Long-term challenges include preparing the economy for freer trade with the U.S. and European Union while improving education and job prospects for Morocco's youth. The government hopes to accomplish this by increasing tourist arrivals and boosting foreign investment in key industries. The U.S. Agency for International Development has several enduring programs focusing on improving Moroccan companies' capacity to increase exports in fashion and textiles, leather and other handicrafts, fisheries, and to grow its call centers, while improving education and training.

Foreign Direct Investment rates have fluctuated since the late 1990s and currently contribute 4% of GDP. Private FDI has steadily increased from key European countries and the U.S. since 1997. (See Figs. 2 and 3 FDI Statistics.) In recent years, increasingly the oil-rich Muslim states have been investing in Morocco rather than more volatile Middle Eastern states. Additionally, private transfers via personal remittances of those working abroad contribute to Morocco's foreign currency. Simultaneously, the Kingdom has been able to reduce their external debt at a commendable rate, a 50% reduction in seven years, to \$15.6 B.

The government has established a free trade zone in Tangier, which is open to both Moroccan and foreign companies and allows firms located in the zone to import goods duty free, and makes them exempt from other taxes. Moroccan labor laws apply to the zone, but few, if any, firms are unionized. As part of the Kingdom's reform program, sixteen Regional Investment Centers, RICs, serving as one-stop shopping centers for foreign businesses, were established. RICs are located in major cities throughout the country and are linked by the "E-Government Cyber Network" to key government ministries. Trained staff at each RIC assists new businesses in the preparation of license applications and other documents. With the assistance of a RIC, a start-up business can be fully licensed and up and running within two days.

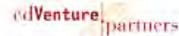
In another modernizing effort, the Moroccan government has adopted a number of measures to liberalize the banking system. Credit is now allocated on market terms, and foreigners can borrow in the local market. Morocco's currency, the dirham, has reaped the benefits of this new system and has appreciated in relation to the dollar since 2003 due to more liberal financial markets and to strong influence of the Euro in Morocco's currency basket.

At the core of Morocco's effort to entice foreign business is the 1995 Investment Charter Law, which simplified the tax code. Additionally, Morocco simplified the country's customs schedule, applying two flat-rate tariffs on all imported machinery, parts, equipment, capital goods, and accessories brought into marketplace to expand a business. The Charter also shields foreign investors from paying a value added tax, VAT, on imported equipment, materials, and goods; and exempts start-up firms from license fees, corporate taxes, and general income taxes for five years. Thereafter, new businesses are required to pay a tax that is deeply discounted.

The State Enterprise Contract, a relatively new business incentive program offered by the Moroccan government, underwrites the cost of on-the-job vocational training, land acquisition, and building construction for qualifying start-up businesses. Another grant program, the Hassan II Fund, rewards new enterprises that venture into selected markets, including: electronics, information technology, vehicle subcontracting, leather processing, and ready-to-wear clothing.

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Case Study



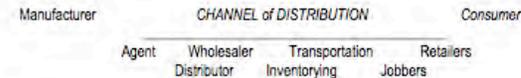
Morocco's government has made considerable effort to improve the infrastructure of the country. The government started a program in 2006 to spend \$363 M on projects to boost passenger traffic and cargo business, and to improve railway stations serving the Casablanca airport. They have set a goal of building an additional 100 kilometers of highways per year. A new terminal at Casablanca's international airport is due for completion later this year, effectively doubling the airport's annual capacity to eight million passengers. Perhaps most notably, Morocco and Spain have agreed to build a tunnel across the Strait of Gibraltar to facilitate shipping between North Africa and Europe. To reduce the country's high transport costs, a massive port expansion in the northern city of Tangier is due for completion in mid-2007. Industrial hubs nearby will support key export sectors including textiles, auto parts, and electronics. The investment will multiply port traffic by fifteen fold, effectively reduce transport time to the U.S., and reduce transport costs by 50%.

Morocco has a non-discriminatory legal system that is accessible to foreign investors. The commercial courts, established in 1998, have begun to mitigate weaknesses in commercial proceedings. A system of commercial arbitration was also created in April 1998. Additionally, Morocco has instituted a broad body of laws and regulations to combat corruption and protect intellectual property rights. Corruption nevertheless exists and U.S. companies have at times identified it as an obstacle to doing business in Morocco.

Overall, Morocco has made respectable progress economically in recent years with improvements in its financial and investment sector, political reforms, and efforts in social programs toward building a competitive economy in an age of knowledge over sheer physical labor. In the 1980s and early 1990s, Chile was likened to California in the 1950s: rich in resources, a diverse and Mediterranean climate, and a drive to become a competitive economy. Morocco is now like Chile was ten to fifteen years ago but with a superior location. MATIC has the opportunity to communicate the Kingdom's invitation to foreign investors and trading partners and needs to develop a solid IMC.

Target Audience

MATIC is working to identify American firms that would benefit from Morocco's geographic location and its trade agreements not only with the United States but also the European Union, Turkey, Francophone Africa, and many Arab countries. Once they are identified, MATIC will need to communicate with a well integrated marketing program. All players in the channel structure – from exporters to the final consumer – are part of the market MATIC targets in its communication and education outreach as to the strengths of Morocco's marketplace, economy, and the opportunities the country offers as a business partner. In designing the positioning strategy and IMC needed, the focus is currently more at the upstream end, distributors and wholesalers, and less on the downstream end, the consumers. While the B-to-C market and research results must be considered in developing the optimal IMC since consumers definitely have the ability to "pull through" certain product categories and brands, the immediate priority for MATIC is to implement a solid, comprehensive plan targeting the B-to-B market. In certain industry sectors (Fashion/Textiles/Garments, Design Materials, Agriculture and Processed Foods), B-to-C considerations play a stronger, more immediate role. In many markets, the "push" approach is critical and that was supported with research results in all five industry sectors studied and detailed below. General characteristics of B-to-B customers will be discussed and then characteristics of each of the specific industry sectors' buyers will be presented.



Characteristics of Decision Makers. Outsourcing offshore, particularly for American firms, is growing at an estimated 10-20% per year. U.S. firms invest billions of dollars annually in offshore operations. The Bureau of Economic Analysis estimates that by 2008, more than half of the Fortune 1000 companies will have overseas operations dispersed across the globe. The decision to outsource is primarily driven by a desire for overall operational cost savings as well as the potential to expand sales into the host market. Decisions to trade and produce abroad are made by very high level managers, most commonly Chief Executive Officers (CEOs), and Chief Financial Officers (CFOs) – "C-Level executives."

Although specific goals vary for individual organizations and across industry sectors, the most common driver for off-shoring is cost savings with regard to labor and capital. According to a survey of over 5,000 C-Level executives in North America¹, potential locations for off-shoring are first considered based on their ability to provide a significant cost savings and yield an overall savings of near 20%. This was reinforced in the research into the food processing industry with suppliers and retailers reporting the need for a higher than domestic rate of return that is sustainable. They reported they were not simply looking for the lowest price in the short-term.

Once the decision makers are aware of the cost saving potential, locations are evaluated on other key criteria:

- Reputation for expertise at providing the desired service
- Availability and education of labor pool
- Political and legal environment
- Cultural familiarity and English language proficiency
- Geographic proximity
- Quality of infrastructure
- Government incentives
- Abundance of natural resources required for the industrial sector.

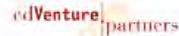
All of these general criteria were supported with MATIC's first round of research but to differing degrees within diverse industries. The off-shoring decision process is complex and time consuming. The process begins with awareness and goal setting and then moves into the critical issues of site selection, vendor/partner selection, contract negotiation, governmental filings, and finally into actual logistics management. From concept to implementation, the process takes anywhere from 12-24 months.

Media Habits and Information Sources. For MATIC, C-level executives have proven to be a hard-to-reach audience. C-level executives are notoriously short on time and thus pick and choose from among their media alternatives depending on what information they are looking for at the time. Several of the student research studies concurred that securing executives' time was not easy. A 2005 study² of the media habits of over 1,000 C-level executives evidenced that the Internet, industry trade shows

¹Ventaro, "Offshore 2006 Research," Available online at: <http://www.ventaro.com/Offshore2006ResearchFindings.pdf>

²Ipsos MORI Media North America, "2005 Survey of Media Consumption and Buying Power of Key Decision Makers," May 3, 2006.

Case Study



and publications, and newspapers are their most widely accessed media sources. The most important source of business information was ranked by CEOs and CFOs as:

Internet	56%
Newspapers	19%
Trade Magazines	11%
Business magazines	6%
Broadcast	4%

One-fifth of top business executives use the Internet as their first stop for general and specific business news, and about a quarter say it is the first place they look for financial news, according to the survey. CNN is most popular among online news sites, cited by 11%, followed by MSNBC with 8%. Twenty-nine percent of U.S. executives surveyed have adopted mobile devices for media and communications access anytime they wish.

According to research conducted by university students in the spring of 2006 on behalf of MATIC³, on average over half of key decision makers participate in industry trade shows. This research showed that personal visits, industry trade shows, and symposia are the preferred ways key decision makers want to learn about investment opportunities in Morocco. Research also showed that public relations efforts in key trade channels are effective tools to reach this target audience.

According to the previously referenced survey, newspapers are an important part of the executives' daily routines. Almost half, 46%, read *The Wall Street Journal*, while 30% read *USA Today* and 14% regularly read *The New York Times*. It may be that MATIC communicators need to employ a variety of media to reach their intended target markets. General business information, such as the Moroccan opportunities, might need to be communicated very differently from specific industry information, and crafting the optimal IMC will be challenging.

Agriculture and Processed Foods

Moroccan Food Processing and Packaging occupies a privileged place in the economy because of its contribution to exports and job creation. It is the leading processing industry in Morocco, with a production of \$5.6 billion and an export value of \$790 million. Providing 103,463 jobs, the industry has grown steadily since 1990 at an average of 6.5% annually. This sector is expecting increased prosperity related to improved trade with the U.S. and EU, and the development and diversification of local demand and agricultural production.

Exports constitute 80% of the industry's revenue. Canning of seafood, fruits, and vegetables are the leading sectors for export comprising 88%. Specifically olives, olive oil, sardines, and fruit comprise nearly 80% of all exports, with dairy products, vegetable and animal oils also contributing to 8% of the exports. Although neither are food products, within the agricultural sector it should be noted that the tobacco industry weighs in at 13% of total production with a growth of 34% and is primarily for domestic consumption while wine is an export to the EU, particularly France and Spain, and to the U.S.

Morocco's competitive advantages in this sector center primarily on climate and geography. Blessed with large amounts of arable and irrigated land, and numerous temperate and semi-arid climates, Morocco enjoys a very long growing season capable of supporting a wide variety of crops. Additionally, the fishing industry in Morocco is thriving and has potential to expand substantially. The world's largest

³MATIC, Brand Morocco Research Competition, spring 2006.



producer of sardines, the Kingdom's rich coastal waters also produce enormous quantities and varieties of other seafood including swordfish, sole, lobster, and cephalopods. Morocco's agricultural system is extremely responsive to innovation and flexible, adopting technology in recent years to extract essential oils, greenhouse cultivation, and industrial cold process, both frozen and deep-freeze.

Nestle has developed a large range of products for both the local market and for export such as dehydrated soups, evaporated and powdered milk, and baby food. Lukus farms several thousand acres for the production of oil resins, powdered tomatoes, and powdered red pepper. The Saudi el Baraka Group has invested in fish canneries and greenhouses while both Kraft Foods and Coca-Cola also have significant investment in the Moroccan food processing sector.

Several research projects were commissioned by MATIC to analyze the current status of wholesalers, distributors, retailers, as well as consumers' perceptions of food products grown and processed in Morocco. While MATIC would like to broaden the value of Moroccan exports beyond agriculture, many emerging nations such as Chile have successfully directed their labor pool to produce and package food products with added value. Typically, there are fairly long channels of distribution between the grower and the final consumer although Wal-Mart and Costco, two of the top five American food retailers, have substantially shortened the channel in their operations. Many players in the B-to-B market expressed that they chose food items that were trending in the often fickle consumer market. If an item did not sell, it was dropped.

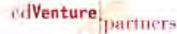
Throughout the entire channel, suppliers, retailers, and consumers, student researchers commissioned by MATIC found there was little awareness of products from Morocco, but they also did not really care much about the country of origin. Virtually all players queried responded that they did not buy something because of the country in which it was produced but were more concerned about quality, freshness, and value. At the distributor level, the critical decision factors after consumer demand for the product category were:

- cost
- package size and safety, ability to move items quickly and safely with little shrinkage or waste
- ability to interface via E-business
- timeliness in delivery

Distributors and retailers reported they were driven by consumer trends and that there is a rising taste for exotic and ethnic foods, which now comprise 11.8% of food purchased in American stores. They were concerned that a foreign partner was stable, ethical, produced safe food products, and packaged them properly. Human rights issues surfaced but respondents suggested that did not mean they would not source from a country, but would prefer not to own a plant and deal with labor and human rights issues directly. The channel members reported they were most likely to be influenced by trade shows and trade publications.

Many consumer respondents had essentially no awareness of Moroccan food products. In one of the studies, 46% could not identify any product Morocco might produce. Of those who could identify any products, citrus products, olives and olive oil, fruits, wine, orchard fruits and some vegetables were named. All are very similar to food products from other Mediterranean countries. Couscous was the only item to be identified that was more typically North African. Among those who could not identify any food products with the Kingdom, only a small percentage viewed the potential products negatively. Instead, the expectation was very positive. Further, many respondents were already buying in product

Case Study



categories that Moroccan producers process but they are likely to purchase them from California producers or Chilean in the opposite seasons.

Consumers repeatedly ranked quality as the highest priority in their food choices, followed by nutritional value, price, and packaging. They reported they increasingly seek exotic and fresh foods and were inclined to watch travel and cooking shows for inspiration and recommendations. Similarly, personal recommendations or experiences with a food item were found to be influential to consumers, suggesting demonstrations and perhaps in-store sampling. Several consumers reported they expected Moroccan foods to be somewhat spicy even when they could not specifically identify Moroccan food products. Respondents categorized Morocco as third after Mexico and Chile as the most likely foreign country from which they expected to buy imported products.

Generally, results of research in the entire channel from B-to-B to final consumer markets evidenced limited knowledge or awareness of Morocco and food products processed there. Many associated the nostalgic romantic image of the desert oasis portrayed in the movie *Casablanca*. A few Baby Boomers described an image of hippies and associations with Marrakech. Essentially, their lack of knowledge offers marketers a "clean slate" on which to premise their IMC.

Textiles and Apparel

Another industry which requires easily implemented equipment and staffing in which Morocco has been a player since the 1950s is textiles, fabric manufacture and design, as well as apparel design, manufacture, and finishing. This industry has grown significantly over the last decade due to competitive labor costs, creative designs, and increasingly free access to nearby European markets. Comprised of 1,700 companies, this sector represents more than 200,000 full-time positions and generates 33% of Moroccan exports in value approximately \$3 B⁴. The leading industrial activity, employing roughly 37% of the industrial labor force, textiles is comprised of both informal small workshops (occasionally found in family homes) employing 70% of industry workers, as well as more formal, large manufacturing facilities run by multinational corporations.⁵ The informal sector represents 70% of the employment in the industry.

While the industry has made great strides in growth since the late 1980s, it is more recently in a period of transition and stagnation. Output from the weaving industry has declined on average of 1% annually since 2000, and the clothing industry by 3.7% a year. The sector suffers from low productivity, high labor and energy costs, and inflexibility relative to overseas competitors. While Moroccan labor productivity in this sector is about the same as in China and slightly higher than India, the wages in Moroccan plants are about twice as high as in Chinese factories and four times as high as in Indian plants.

In December 2004, the Multi-Fiber Agreement (MFA) that protected Morocco's relationship with EU trading partners ended, allowing Asian manufacturers to compete directly. To attract the now more important U.S. firms, textile makers are shifting away from low-value-added product lines to high quality, fashion-focused products and are investing in upgrading technology. Many facilities are able to process orders quickly and fly the finished clothing to buyers in a matter of days. Capital investment on industrial equipment increased 10% in 2004 as manufacturers began to reinvest their earnings to

⁴ All Export and trade statistics from the International Trade Center, a technical cooperation of the United Nations Conference on Trade and Development (UNCTAD) and the World Trade Organization (WTO).

⁵ All industry segment profile data assembled from sources used in MATIC Brand Morocco Research Competition, spring semester 2006 unless otherwise noted.



improve and update their capabilities. The country's largest textile manufacturer, Spanish-based Tavex Algordonera, has begun investing some \$46 million to modernize its Settavex facility, which assembles jeans and sportswear in Morocco.

As a key industry sector for the Kingdom, there is clear commitment to improve and support it. The government launched a modernization program for textiles in 1997 to upgrade private small and medium-sized firms to meet European and American standards for technology, productivity, and fair labor laws. Incentives offered since 2002 include a cut in the social security contributions and electricity costs of textile firms. With the implementation of FTAs, textiles and apparel trade with the U.S. and the EU is now duty-free. Fruit of the Loom has moved its fiber processing plant from Ireland in 2004 to the more competitive textile landscape in Morocco. Several prestigious American and European brands have manufacturing operations in Morocco, including: Escada, Pierre Cardin, Banana Republic, Marks & Spencer, Levi Strauss, and the Gap.

Morocco does not have its own recognized labels, and the research conducted by MATIC suggested country of origin, the "made-in" label, is fairly insignificant but that the brand name is key. The textile industry is driven by changes in style, fabric, and construction techniques such as knits versus woven. Consequently, manufacturers do not always commit to a plant or host country unless they are making a staple item such as underwear or jeans. It can be desirable to the firm to have flexibility and be able to maneuver across diverse sourcing locations. Typically, apparel and textile firms seek:

- ability to communicate with suppliers and be able to trust them
- consistency of quality output at good cost
- rapid turn-around times and ample capacity
- producers and designers with a strong sense of style

Buyers and textile industry intermediaries reported that they were most likely to follow the advice of trusted experts and other manufacturers in the industry. A good report on manufacturer or host country was the best communication to convince the firm to venture to a new site. Trade shows and publications were critical, but to date, industry players were no different from the consumers surveyed, they know virtually nothing about Morocco and its textiles.

Despite the fact that there are already many successful suppliers producing in Morocco, especially formal wear and jeans, most respondents had little idea there was a viable industry that sought to attract a larger share of the global textile and apparel industry. One buyer reported that even though he had vacationed in Morocco and enjoyed it, he did not consider it for sourcing as it lacked style. There are many competitors for the industry and China supports eighteen times as many projects, many of which are substantially larger than Moroccan production runs, while even Bulgaria enjoys six times as many textile projects. Many other sources – Turkey, Mexico, and China for example – have much greater capacity. Other host nations such as Italy receive greater scores on prestige, style, and quality, while Mexico was rated well by respondents for ability to produce short runs especially for easy-care garments. Jordan, employing JGATE, a non-profit organization created to attract and support the textile industry, has been fairly successful in attracting manufacturers to their country nestled in the midst of the tumultuous region of the Middle East.

Even more than in the food processing industry, the B-to-B portion of textile distribution tracks consumer preferences and attitudes with 87% reporting historical sales data is often the most critical information about sourcing. Consumer research evidenced similar patterns in attitudes about country of origin and familiarity with Morocco as found among suppliers and buyers in the B-to-B portion of the textile industry. Both portions of the market reported findings similar to other industrial sectors

Case Study



researched, a "Casablanca effect," with minimal actual knowledge just general associations such as exotic, bohemian, sexy, flashy, leisurely, casual, and natural. These contradictory responses indicate, at both ends of the distribution channel, that Morocco is virtually unknown to Americans. Associations, many inaccurate, are not necessarily negative but slightly positive. Respondents tended to create good images of the country, although not necessarily its products, on their own.

According to MATIC commissioned student conducted research¹, corporate decision makers in the U.S. fashion and apparel industry are receptive to the idea of new business opportunities in Morocco. The American retail market is on the rise with a renewed trend toward fashion and design among consumers, and buyers are looking for new avenues to meet this demand. Similar to decision-makers researched in all the sectors, however, the key decision makers in this industry are not very familiar with Morocco and the capabilities of its textile industry, and are hesitant to explore new sourcing partners. They are extremely concerned about sourcing from companies with reliable reputations as ethical suppliers. They look for open communicators who offer flexibility and consistent quality of product.

Design Materials

The design materials sector is one of the major industries in Morocco, and the country has developed a diverse and elaborate patchwork of artistic traditions - impressive leatherwear, jewelry, ceramics, tile, decorative marble, specialty wood products, and elaborate woven carpets, to name a few. Moroccan design and craft have several distinct elements, and U.S. consumers might describe the overall look and feel as exotic, dramatic, and rich in craftsmanship. Evolved from classical Moroccan traditions, these design materials pose a great growth opportunity for the Moroccan economy. It is estimated that 13% of the working population depends directly or indirectly on the handicraft industry and that there are 500,000 cottage industries, accounting for 15% of Morocco's GNP and supporting one in five Moroccans.² The products U.S. consumers listed most often when asked about "Moroccan products to buy" were rugs, textiles, stone, tile, and leather, thereby indicating that the design materials industry is one that U.S. consumers most strongly associate with Morocco. Close to half of those surveyed were interested in products made in Morocco.

Stone, Ceramics and Tile

The stone and ceramics industry is growing, not just in Morocco but also worldwide. Between 1998 and 2002, global production increased on average 4.5% annually. There is a real opportunity for Morocco to command a larger share of this global market. Morocco's varied geology and rich mineral deposits make the country one of the world's largest exporters of phosphates. They have also inspired the production of traditional ceramic tiles, and pottery. The ceramics industry is concentrated around 40 businesses employing about 6,000 people. For stone production there are approximately 100 businesses with over 2,000 employees. Most stone suppliers provide popular stones for export like marbles, granites and fossilized marbles, travertine, limestone, calcite, and onyx. While Morocco is not an unknown player, the level of quality and capabilities of the Moroccan stone industry is virtually unknown to the U.S. market - causing Moroccan quarries to sell to the U.S. through indirect channels, as opposed to direct channels. Moroccan stone products are often brought into the U.S., but many first pass through Italy, and are exported as "Italian Marble." Currently the top five competitors exporting stone to the U.S. are Italy, Brazil, Turkey, China, and India.

¹ All data pertaining to Moroccan design materials, except for export statistics, courtesy of Moroccan Ministry of Industry, Trade and Handicraft unless otherwise noted.



The advantage that Morocco has over several of the competing stone exporters is inexpensive labor. Morocco would like to export directly to the U.S., thereby cutting out the additional expense for both countries. Morocco is capable of producing marble of similar quality to notoriously high-end Italian marble, is able to sell it for a significantly lower cost, and has much of the same processing equipment as Italy. U.S. decision makers ranked Italy first in regards to their perception of stone quality and price, but when asked if stone quality was strongly related to country of origin, only 27% of respondents agreed.

While Morocco has the raw materials, labor, facilities, equipment, and export capabilities needed to quickly ramp up demand, there is a lack of U.S. demand. MATIC-directed research revealed that there was a very low awareness of Moroccan stone products among U.S. decision makers within the B-to-B market. Those who were familiar with Morocco, however, had positive impressions about the quality of its stone. Decision makers for installers and construction companies were mostly content with current suppliers and distribution channel established while many of the importers were more driven by price, quality, and availability. For all segments the primary concern was the availability of a particular "look" of stone or product, followed by price and quality.

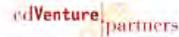
Lack of consumer interest and lack of awareness that Morocco sells stone were the primary reasons for not purchasing from Morocco. The majority of decision-makers (66%) was not resistant to other countries and would consider purchasing Moroccan stone, assuming equal quality with stone from other countries. Sixty-four percent indicated that their customers never had inquired about Moroccan stone. Interviews revealed that there is currently very little marketing of Moroccan stone in the U.S., evidenced by the lack of Moroccan representation at Coverings, the largest tile and stone trade show in the U.S. Moroccan companies have instead chosen to focus on the European market, and only budget for shows there.

The research evidenced that U.S. consumers who had purchased stone were mostly ages 25-44, likely to have graduated or have some graduate education, and generally have an annual household income over \$100,000. These consumers agreed that having nice things is important to them and that they are motivated by the search for meaningful experiences in life. They did not agree that brand names and products perceived to be exotic were important to them. Consumers also reported that their decision to purchase home improvement materials was most strongly influenced by product quality and price, and least influenced by brand and country of origin. They did not have a strong association between stone quality and country of origin, but they had the perception that a higher quality results in a higher price. Italy was ranked as highest quality and price. In general, there was a low awareness of the availability, price, and quality of Moroccan stone goods.

Based on the information collected, it is apparent that Morocco needs to improve their presence and reputation in the U.S. since Morocco is virtually unknown to both consumers and decision makers in the U.S. Perceptions of the country ranged from "exotic" or "vacation destination" to "terrorist." Without information about the importation and investment opportunities and benefits, U.S. decision makers have no incentive to change their current behaviors. Considering the difference in the cost of labor in Morocco, U.S. businesses are undoubtedly missing out on potentially profitable business with Morocco.

The development of an IMC plan directed to key players in the U.S. industry would provide an opportunity to interact with decision makers and provide the information and samples needed to make purchasing decisions. This is particularly important since importers reported that they are willing to import from anywhere as long as the product and the price are competitive. This information would suggest that branding Morocco is not as important as simply being available and competitive to buyers.

Case Study



Potentially, there is a win at all levels. Moroccan stone exporters could make higher profits by exporting directly to the U.S. In turn, U.S. suppliers could make higher profits by saving on their cost, and consumers could save money by purchasing high quality products for less than Italian marble.

Leather

Morocco is known for high-quality unprocessed and semi-processed leather goods. In 2004, leather exports totaled \$141 million. The industry is comprised of over 330 companies and employs 16,000 workers. The sector is poised for growth and as a result saw direct capital investments of \$16.9 million over the past year. Exported items consist of crafted goods like belts, handbags, shoes, luggage, small personal leather items as well as bulk items like leather skins and hides.

In 1999, the Moroccan government partnered with Italy to develop an ongoing relationship devoted to promoting leather industries and related sectors. The arrangement includes regular training of Moroccan leather craftsmen, sharing of the latest innovations in leather processing and investment, know-how and counseling needed for the promotion and marketing of leather abroad. Today Morocco has two leather training institutes that produce craftsmen adept at producing high-quality leather goods, much of it in the renowned Italian craftsman style. This has given Morocco a competitive edge over other leather producing countries, primarily those in Eastern Europe, who have leather industries of similar scale.

The U.S. leather industry has suffered significantly over the last decade due to foreign competition and the fact that many of their customers, U.S. footwear and travel goods manufacturers, have moved offshore. Offshoring has been successful due to the availability of inexpensive skilled labor in international tanneries and a tradition of craftsmanship that has not thrived in the U.S. With the availability of low cost skilled labor, Morocco's leather industry is well-poised to take advantage of the offshoring trend, especially with the Moroccan-American FTAs removal of tariffs on leather goods.

Wood Products

Morocco exported nearly \$75 M in wood and forest products in 2002, which accounted for 22% of the country's GDP.¹ Morocco's wood industry suffers from outdated sawmill technology, underutilization of capacity, and situations of non-sustainable forestry. As a result, Morocco has found it difficult to compete with other countries, like the U.S., China and Brazil, which have large-scale wood export operations that take advantage of economies of scale and specialize in the export of commodity wood products. However, processing of exotic woods used in niche industries such as hand-made art items for upscale home décor, has begun to show signs of promise. The unmet demand for higher grade wood products translates into export selling prices routinely higher than can be realized domestically. As a result, Morocco's primary wood exports are exotic in nature: cork, cedar, evergreen, oak, thuya, argan, and eucalyptus. In their natural material form, or processed form, these woods can command a higher price than commodity woods, thereby allowing enough margin for sawmills and wood processors to continue operation.

Woodcraft has for centuries occupied a very important place in Morocco's architectural and furniture-making traditions. Various techniques are used, including: sculpture, engraving, turning, carving, painting, illumination, marquetry, inlay, leather covering, stud-work, and others. Each discipline employs specialized craftsmen: joiners, wood sculptors, wood turners and painters, marquetry workers, wooden-chest makers, etc. One U.S. importer/retailer indicated that the reason why his company purchases wood products from Morocco was its "nice, beautiful accessories and unique design

¹ Food and Agriculture Organization of the United Nations, World Bank.



elements." On the other hand he also reported inconsistency in quality as a reason for not doing business with Morocco.

The U.S.-Morocco FTA provides that wood product imports from Morocco to the U.S. are immediately eligible for duty-free treatment. U.S. exports of wood products to Morocco for further processing will enter duty-free status after either a five-year or a nine-year tariff reduction schedule and then can be re-exported duty free. To help expand this sector, the government continues to work with the nation's banking system to offer inexpensive capital to businesses engaged in improving production efficiencies in sawmills, and tax breaks for those that operate sustainable forestry. These changes, coupled with the FTA, are expected to lead to more financial investment in processing and export of woods used for handcrafted art and design pieces, as well as high-end building materials.

Manufacturing: Automotive and Aeronautics Parts

Student research projects were conducted to identify the level of knowledge and current perceptions held by U.S. decision makers about the parts manufacturing industry in Morocco, specifically the automotive and aeronautics industries. The history of both these industries stretches back to the late 1950s and the Moroccan workforce has competency in several specialized areas at various stages of the supply chain. Despite this, decision-makers in the U.S. were generally unaware of the existence of an automotive industry in Morocco. They had only basic knowledge of the country's capabilities and most of them could not name any major manufacturers already present in Morocco. Interestingly, over three quarters of those interviewed did business offshore in other locations, but 96% had never done business in or considered Morocco. However, slightly more than half of decision makers in the parts manufacturing industry showed interest in Moroccan products.

Automotive companies have a notable presence in the Moroccan manufacturing industry and the sector employs nearly 28,000 workers, most of them skilled. Auto parts manufacturers have become experienced at producing after-market parts that are in high demand in the U.S. including: exhaust systems, pistons, leaf springs, non-electric cables, tempered glass, seats, electronic assemblies, lighting lens, and a wide range of plastic molded items. Many high quality automakers such as Delphi, Good Year, Renault, and Volkswagen already operate in Morocco.

The aeronautics sector is smaller, but growing rapidly with investments resulting in the creation of 4,300 jobs between 2002 and 2005. Its success is mostly tied to European companies, particularly Airbus. Thanks to the Moroccan governmental focus on aeronautics as a key global manufacturing sector, some 40 companies, including suppliers for both Airbus and Boeing, now play a part in developing the Moroccan aeronautics industry on a global scale. The country's highly skilled labor force and presence of "clean" manufacturing facilities (facilities in which electronic parts can be assembled) provides an advantage over foreign competitors like India and China.

Respondents in the automotive sector indicated that there are several factors that contribute to a company's decision to move outsourced work from its current location to a new market. At the top of the list were cost advantage (labor and/or materials), quality, advancements in technology, and free trade zones or free trade agreements. Other factors taken into consideration include:

- an established production process
- reduced transit time
- skilled labor
- historical relationship
- financial stability

Case Study



Although most companies employ all or some of these criteria in choosing new markets and suppliers, one decision maker stated that "at the end of the day, international expansion and the choice of supplier is often a gut feel." As reported, decision makers revealed that their companies are motivated to expand into new markets by clear cost, quality or technological advantages or by a combination of these. Although Morocco has the advantage of eliminating tariffs thanks to the FTA with the U.S., this alone was not viewed as a sufficient advantage. According to one report, the quality of auto parts originating from Morocco was only perceived to be average. Respondents were also concerned about shipping costs and transit time as possible obstacles.

Research results suggested that Morocco needs to identify a unique value proposition upon which to build a comprehensive marketing campaign. Proven sector experience gives confidence to potential investors, and the knowledge of the presence of other U.S. manufacturers definitely impacts decisions to invest in Morocco. Overall, awareness of the manufacturing industry's potential is the primary objective for Morocco to resolve with respect to American executives in this sector.

High Tech Industries

In many ways, structuring a country as a market for high tech industries is quite different from less skilled labor sectors because of the complexity of the decision-making. The process by which a firm chooses to produce offshore is not simple. As the labor force becomes more educated, the economy increasingly more middle class, and the whole economy shifts upscale, there are several findings that apply to all sectors, if not immediately, at least in the long-run. Unlike food processing or textiles, where the foreign firm can simply stick their toe in to test the waters, high tech firms have to make a more direct commitment to enter the market. Further, with substantial investments in the market, it is more difficult to exit easily. The requirements for these firms to enter Morocco offer valid illustrations for other sectors. Similarly, other developing nations that have successfully attracted high tech firms to their market are important to understanding motivations and incentives to American investors.

Today at a value of just over \$1 B, the IT industry represents two-thirds of foreign investment in Morocco and accounts for employment of 40,700 citizens. The industry includes manufacturers, distributors, resellers, solution providers, call centers, ISPs, ASPs, software developers, e-commerce, consulting, training, engineering, and telecom companies. Morocco is also moving up the value-added chain into higher-end technology, notably semiconductors. Semiconductor exports to the United States totaled \$54.1 million in 2002. The majority, 65%, of IT operations, are headquartered in Casablanca, 20% in Rabat, and 15% in other large cities.

The Moroccan government is striving to support IT law by training and educating copyright judges to implement, apply, and enforce intellectual property and e-commerce laws. The education system has been redesigned to train an entire generation of IT technicians, graduating about 5,000 IT professionals from universities each year. The government has also introduced several incentives such as innovative financing including venture capital funds for start-ups; a clearinghouse of IT ideas for investment; an Open Access Fund for enterprises; and the establishment of a "technopark" (technology incubator) in Casablanca where firms can operate rent-free for contracted lengths of time.

For foreign investors, the appeal includes wages for IT professionals that are half those in Europe, a workforce with varied linguistic capabilities (Arabic, French, Spanish, English), an advanced telecommunications infrastructure that is quickly conforming to international standards, an expanding skilled workforce, a government sponsored IT research tax credit, and tax regulations that enforce stock option mechanisms. Morocco has already captured almost half of the market for call centers serving



French-speaking IT companies in Europe. Companies successfully operating in Morocco are: Alcatel, Cisco, Compaq/HP, 3Com, Dell, Fujitsu-Siemens, France Telecom, Telefonica, IBM, Microsoft, Motorola, Oracle, Samsung, and SAP.

As with the perceptions in other sectors, there is a "Casablanca Effect" among business managers surveyed about Morocco. With the Kingdom being described as "not on the radar" for most investors, participants in the MATIC commissioned research study conducted by students were likely to consider the nation to be glamorous and mysterious, perceptions derived from the WWII movie. There was also, however, a paradox to the romantic image of Morocco that surfaced with the potential for Islamic terrorism. Despite the 2003 terrorist attack in Casablanca, respondents found Morocco more trustworthy and reliable than many other Arab and Islamic nations.

Business managers reported that making the decision to go abroad to build a plant and hire skilled local workers is a significant decision, often a once in a lifetime action. As with Intel's decision to establish a large-scale operation in Israel, it required much due diligence on the firm's side and substantial "courting" by the Israeli government and business community. Generally, high tech firms agreed their criteria include:

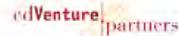
- skilled labor at a lower cost than in the domestic market
- proximity to markets
- political stability, although multi-lingual managers were less concerned than mono-lingual speakers
- multi-lingual workers
- intellectual property rights (IPR)
- transparency in government actions
- trade incentives
- safety for expatriates
- lack of corruption

It was determined that one of the most significant factors in convincing the firm to choose the foreign host country was to look to those firms that had preceded them, identify their success and problems. An example such as Dell's entry into Morocco was seen as an early mover to be profiled carefully.

Generally, most professionals who were respondents in the research study had more knowledge of Morocco than did final consumers in other sectors, but it was not substantial. It could be described as very "uncertain" or even obscure. Of thirteen emerging markets presented, only Turkey and Tunisia were identified as being less known by managers. Many saw the country as a resort area for Europeans but generally saw it as more stable and safer than many other Muslim nations. Few realized the geographic advantages of Morocco, although those firms already trading with France and Spain viewed the country in a substantially better light and were more familiar with the Kingdom's assets.

When compared with other emerging markets also seeking to attract Foreign Direct Investment, Morocco was not perceived negatively. It was simply an unknown. For high tech firms, India was the first choice with 88% reporting it the best place to outsource. Despite personal safety issues, Israel ranked fairly high because of its highly skilled labor force, its entrepreneurial activity, business incubators, and the incentives the Israeli government offers. Most participants were unsure of how they would learn of investment opportunities in Morocco and results were fairly scattered. Rarely did they suggest they would contact government agencies for promotional materials. For general business information, they reported they are most likely to use the following sources:

Case Study



- personal experiences - 80%
- business associates - 74%
- consultants and marketing experts - 68%

Research results suggest Morocco would be well-served to examine strategies and tactics other emerging nations seeking FDI employed to increase their visibility. Several, including Portugal, Estonia, Poland, and South Africa post-apartheid, hired marketing consultants and brand experts to create "buzz" to either dissolve their pejorative image or to create an image from an unknown posture. Slovakia and the Czech Republic, which parallel Morocco with good language skills and a well-educated workforce, have been aggressive in positioning themselves for outsourcing but have had a fairly half-hearted acceptance. Chile has done a good job in moving itself from being solely dependent on commodity crops and minerals to essentially having won the "beauty contest" and created a strong brand image for itself. Now moving to increasingly higher technology industries, Chile has developed an integrated society with an enduring reputation of providing value to products and a good quality of life. Respondents reported that Chile did not simply offer investors incentives (as any country could match the offer of short-term incentives), but they created a favorable work environment in a climate very similar to that of Morocco.

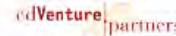
Current Perceptions of Morocco

While each of the industries analyzed by the MATIC-funded research has diverse characteristics and requirements, there is a convergence in perceptions measured both for consumers and for decision-makers who are responsible for the move to outsource business to Morocco either through export or direct investment in production facilities. A common finding from the Brand Morocco Research³ was that business managers and decision-makers have an extremely low awareness of Morocco as a location in which to do business. Whether in the low tech industry of food processing or in the high tech industries of IT, country-of-origin was relatively insignificant if the product met the firm's quality standards at a good value and in timely manner.

Overall, it was learned through the research about positioning of Morocco for off-shore American business, that executives are unsure about the wisdom of an investment in Morocco, the economy's stability, or government incentives. In each industry, competing countries were identified by respondents – ranging from India and Israel for high tech firms, to Mexico, Italy, and China for textiles. In some cases, their lack of specific knowledge led them to make incorrect assumptions about Morocco's opportunities from chaotic distribution and communication channels to human rights and labor issues. In general, however, the Kingdom is starting from neutral to a slightly positive position, an unusual and very fortunate situation in which to be from a marketing standpoint.

MATIC would like to diversify investors' perceptions of Morocco as being viewed as much more than just a popular tourist destination. When interviewed, a majority of U.S. decision makers associated Morocco with the tourism industry, and an automotive parts area manager for Africa even responded "sun, tourism, and rugs" when asked about his associations with Morocco. The government of Morocco has implemented investor-friendly reforms which combined with a cost-effective and skilled workforce has created numerous opportunities for foreign companies. The marketing challenge is to communicate a unique value proposition in comparison with other low-cost countries to U.S. executives.

In many ways, MATIC is starting with a blank or clean slate. Since 9-11, all Muslim countries have suffered a decline in the way Americans evaluate them. Morocco has slipped from 77% to 48% positive evaluation. However, other American-allied nations such as Jordan and Turkey are rated in the



low twenties. When creating a brand, marketing executives seek to have buyers fill in missing pieces with their own symbols, icons, and associations to each create the brand in their own image. It was learned in the student research in the textile sector that respondents identified Morocco more favorably than Mexico despite reporting they knew virtually nothing about the Kingdom. Consumers and buyers were able to make associations with Morocco, often a "Casablanca Effect," positive but very exotic, nostalgic, and a romantic vacation destination, yet not previously considered for foreign business expansion.

Current investors in Morocco hold more accurate and positive perceptions of Moroccan business opportunities. In a 2004 survey conducted by the American Chamber of Commerce in Morocco, AmCham, 70% of current investors in Morocco are willing to expand their investment and 77% would recommend the investment to other CEOs. They view customs requirements, ports and airport infrastructure as adequate to facilitate global business from Morocco. Overall, survey results indicate a very positive perception of the Moroccan business environment, improving significantly in the past few years as changes during the reign of H.M. King Mohammed VI have been introduced. In 2003, 85% of respondents indicated that their decision to invest in Morocco was a good one, compared with 63% in 2001. Current investors have identified areas that would benefit from improvement including: taxation burdens, a legal system prone to corruption, weak protection of property rights, a need for a better educated workforce, and improved interaction with government agencies.

Competitive Landscape

There were many different countries FDI identified by managerial respondents as places with which they would trade or establish plants and processing facilities. The previous MATIC student research results examined diverse industrial sectors into which Morocco seeks to attract business. Textile buyers, for instance, often seek independent contractors in low wage rate countries so they can write orders for a fashion trend and then move to another source as the style changes, without necessitating heavy investments. Manufacturing of aircraft parts and high tech firms producing electronic components or services such as translation, on the other hand, seek very different requirements in their outsourcing choices. They need stability, reliability, and consistency of skilled workers to produce quality products that can compete globally. Consequently, the competitive landscape for Brand Morocco is nearly as vast as the 210 countries of the world.

Several of the country's competitors are profiled in greater detail in the Appendix II, including China, India, Eastern Europe, Mexico, Jordan, and the Caribbean. Of all sites for off-shore sourcing, China receives the greatest amount of FDI of any nation other than the U.S. However, it is no longer the lowest cost source of goods and services, and, as a Communist nation, still suffers from legal and IPR issues, as well as strict regulation and interference from government in business operations. The second most frequently mentioned country for sourcing by respondents was India, especially for high tech services such as call centers. As a democratic nation with fairly similar laws to those of the U.S., India offers a very large well-educated but low wage workforce with English language skills.

In some product categories there were very distinct competitive countries reported by participants as a location to which they have or would be attracted for sourcing quality products. A quick comparison of the primary countries with which Morocco competes for FDI as a site to receive American businesses is presented below. There are many other nations that may offer a supplier a particular advantage in one or two categories (such as low wages in Indonesia or as does Brazil for stone and marble products), but they have not all been included in this summary comparison table.

Case Study

	Food Proc.	Textile Apparel	Design Prod.	Manu. Aut/Ae	High Tech	Low Wage	Skilled Labor	Product Capac.	Rapid Turnover	Rate of Return	Good Locat'n
China	x	xx	x	xx	x	x	x	xx	x	x	
India		x	x		xx	x	xx	x	x	x	
East Europe		x		x	xx	x	xx	x	x		x
Caribb	x	x		x		x			x		xx
Mexico	x	x		x		x		x			xx
Jordan				x	x	x	x			x	
Israel	x	x			xx		xx			x	
Italy	x	xx	xx		x		x				x
Chile	xxx	x		x	x		x	x			

X: country has good coverage on issue, XX and XXX indicate very competitive position.

Crafting Brand Morocco offers marketers a rare opportunity to build an identity for an entire nation as a target for Foreign Direct Investment. Several other emerging markets have also had this challenge and found they needed to hire brand managers to create the identity and the accompanying "buzz" to communicate the message globally. Ireland and Chile have each had a substantial headstart in the task, and many of the "Asian Tigers" such as Korea and Taiwan have been successful despite far more limited resources and less central locations than Morocco.

In no situation is it a simple assignment, and MATIC will have to be able to communicate a strong value proposition for Brand Morocco to succeed. In all five sectors examined, quality goods and services at reasonable cost were the most important decision factor not the country of origin or the "made-in" label. While parts of the decision are made logically and rationally, there are many elements that are merely a general feeling and comfort factor, reported earlier by an executive as an overall "gut feeling." Here, Morocco has a good position from which to start. While there is little knowledge and identity among American consumers and B-to-B decision-makers of Morocco, most respondents had either a neutral or slightly positive image of the country. Many of those associations and images are vague, erroneous, and outdated, but they are favorable. The task now is to communicate to American investors the true image and opportunities of Morocco.

Student Task

This task requires analysis of existing primary and secondary research as well as the development of an IMC plan.

- 1) For your chosen industry segment, review the research provided in this case and on the Brand Morocco Web site to provide context to the integrated marketing communications (IMC) plan you will create. Consider that with any of the five industrial sectors chosen, the final consumer's needs and preferences should be considered in strategically defining the IMC. This task for Brand Morocco is in the "push" portion of the marketing channel and deals with the B-to-B end of distribution. However, especially if textiles, agriculture and food processing, or design materials are chosen, the consumer communications to eventually be implemented should be outlined briefly.
 - o Morocco's culture, economics and history
 - o How do Morocco's geographic location, political environment, and business environment affect potential new business ventures?
 - o What economic incentives does Morocco offer that would appeal to the target audience?
 - o Are there aspects of Moroccan culture that would be considered beneficial by the target audience?
 - o Target audience
 - o What are the defining characteristics of the target audience?
 - o What are the target audience's perceptions of Morocco?
 - o What specific beliefs and attitudes must be overcome and changed in order to move beyond existing barriers to consideration?
 - Pay special attention to overcoming outdated images of Morocco
 - o What are they seeking from a business partnership with Morocco?
 - o How can Morocco's assets be leveraged to show they provide the benefits the target segment seeks?
 - o For design products, textiles, and agriculture and food processing, what are the final consumer needs that will have to be interfaced with the B-to-B Integrated Marketing Communications?
 - o Competition
 - o In your specific industry segment, what countries are in the competitive set for Morocco, particularly in the Mediterranean and EU regions?
 - o What are the strengths of the competition? Why are businesses attracted to these locations?
 - o How can Morocco's competitive advantages be leveraged against the competition's strengths?
 - o Success stories
 - o What examples exist of companies launching successful ventures in your chosen industry?
 - o How might these examples be used to illustrate the benefits Morocco offers?

Case Study



- II) Design an integrated marketing communications (IMC) plan targeted at commercial decision makers in the industry you have chosen. The goal of the plan is to reach your chosen target audience segment, increase their awareness of Morocco and prompt them to consider Morocco as a place to initiate a business venture/investment.

Your plan should include:

- o Background/situation summary
- o Competitive overview
- o Target market profile
 - o Include defining characteristics in addition to attitudes and beliefs about Morocco
- o Overall marketing objective
 - o Include an explanation of the brand equity and image you are building for Morocco
 - o Develop key marketing messaging about Morocco
 - o For textiles, design products, and agriculture and processed foods, outline briefly what the eventual "pull" message might be that is eventually directed to the consumer, and identify how it will interface with your message and the IMC developed by you for the industry sector decision-makers.
- o Marketing tactics, which may include but are not limited to:
 - o Advertising; traditional and guerilla tactics
 - o Public Relations
 - o Sales collateral and/or face-to-face presentation materials
 - o Personal selling activities
 - o Events/promotion/sponsorships
 - o Trade publications/events/media
- o Specific media plan recommendations
 - o Identify the scheduling and sequencing of various media choices
- o Overall budget
 - o The costs of executing your IMC plan should not exceed a budget of \$1 M USD annually. This includes all production, creative and media expenses. Note: if a minimal incremental increase in the budget will bring exponential benefits, this recommendation may be included with accompanying justification.
 - o Media that targets television or publications aimed at the general public must be justified in terms of cost effectiveness and ROI.
- o Creative execution of all advertising campaigns and writing samples for PR pieces
 - o Develop a visual identity and brand identity for Morocco
 - o Creatively execute your key marketing message
 - o Be sure to utilize existing examples of successful international business ventures currently in Morocco to support your key messaging

Make sure your review of the existing research findings justify your plan elements. Your knowledge of the target audience, situation summary, and competitive analysis should lead logically into your IMC recommendations. Remember, the key marketing message of your plan should appeal to all members of your target audience covering a maximum range of sub-sector targets within your identified industry sector.



The IMC plan for MATIC needs to take into account key challenges and opportunities:

- Among the target audience of U.S. commercial decision makers, familiarity with Moroccan culture and awareness of Morocco's benefit as a location for off-shoring is extremely low
- The target audience has an outdated image of Morocco as a remote desert oasis (i.e., the setting for the movie "Casablanca") which must be addressed
- Commercial decision makers are corporate executives and business managers who are often difficult to reach via traditional marketing communication channels
- Morocco possesses key competitive advantages in each of the industry segments identified. A detailed IMC plan will center on highlighting and communicating these advantages
- The IMC plan needs to focus on high-level benefits that have broad appeal across all members of the chosen target audience
- To illustrate these benefits, each IMC plan should utilize examples of success stories of companies that have established business ventures in Morocco

Case Study



Appendix I: Competitive Country Statistics

Figure 1. Morocco 2005 Economic Statistical Overview

GDP (Billions \$USD)	\$53
Growth Rate	3.70%
Inflation Rate	2.10%
GDP Composition by Sector	
Agriculture	21.20%
Industry	35.80%
Services	45%
Exports (Billions \$USD)	\$9.8
Imports (Billions \$USD)	\$15.6
Unemployment	10.90%
Urban Rate	7.50%
Size of Workforce	
Number of employed by Government	1 Million
Average Work Week	
Public Sector	37 hrs
Private Sector	44-48 hrs
Percent of Population Below Poverty Line	19.0%

Source: U.S. Department of Labor

Figure 2. Moroccan Foreign Direct Investment

Year	Total FDI (\$ in Millions USD)	Percent of GDP
1997	\$801	3.3%
1998	\$385	1.1%
1999	\$946	2.7%
2000	\$246	0.8%
2001	\$2,732	8.0%
2002	\$556	1.3%
2003	\$2,340	5.5%
2004	\$1,070	2.2%
2005	\$2,133	4.1%

Source: U.S. Commercial Service and the U.S. Department of State

Figure 3. Private Foreign Investment Inflows by Country of Origin

Country	2002 (\$ in Millions USD)	2004 (\$ in Millions USD)
United States	\$37	\$78
France	\$210	\$822
Spain	\$35	\$60
Germany	\$43	\$58
United Kingdom	\$30	\$57
Netherlands	\$20	\$15
Benelux	\$26	\$43
Saudi Arabia	\$15	\$86
Switzerland	\$32	\$93

Source: U.S. Commercial Service and the U.S. Department of State



Figure 4. 2005 Economic & Investment Statistics: Country-By-Country Analysis

	China	India	Jordan	Mexico
GDP (Billions USD)	1,900	691.2	11.5	676.5
GDP Growth	10.1%	6.9%	7.7%	4.4%
Inflation	6.9%	5.3%	5.2%	6.1%
Unemployment Rate	9% (urban areas), 20% (total)	6.9%	12.5%	3.6%
Total FDI (Billions USD)	53.1	3.2	0.35	12.1
Total Labor Force	791.4 million	496.4 million	1.46 million	43.4 million
Literacy Rate	90.8%	59.5%	91.3%	92.2%
English Proficiency	Poor	Excellent	Excellent	Poor, but widely used in business
Level of Government Regulation	High	High	Medium	Medium
Corporate Income Tax Rate	33% / 15% (in Special Economic Zones)	35%	35%	30%
Industries of Expertise	Textiles/Clothing Energy (Oil & Gas) Heavy Manufacturing Light Manufacturing IT Manufacturing Food Processing	IT Software Development Financial Services Telecom - Call Centers BPO: Business Process Outsourcing Chemicals & Petrochemicals Food Processing Mining	Textiles/Clothing Phosphate Mining Pharmaceuticals Petroleum Refining Inorganic Chemicals Light Manufacturing Tourism	Food Processing Chemicals Iron/Steel Outsourcing Petroleum Mining Textiles/Clothing Tourism Manufacturing Automotive

	CARIBBEAN					
	Bahamas	Barbados	Bermuda	Cayman Islands	Jamaica	Trinidad/Tobago
GDP (Billions USD)	6.1	4.7	4.5	1.4	8.9	12.5
GDP Growth	3.5%	4.1%	4.6%	1.7%	0.9%	6.2%
Inflation	1.2%	(0.5%)	2.8%	2.8%	12.6%	12.5%
Unemployment Rate	10.2%	10.7%	2.1%	4.1%	11.5%	8%
Total FDI (Billions USD)	0.14	0.11	Not available	Not available	0.42	0.37
Total Labor Force	176,300	128,500	36,360	19,820	1.2 million	620,000
Literacy Rate	95.6%	99.7%	98%	98%	87.9%	96.6%
English Proficiency	Excellent	Excellent	Excellent	Excellent	Good	Excellent
Level of Government Regulation	Low	Low	Not available	Not available	Medium	Medium
Corporate Income Tax Rate	0%	30%	0%	0%	33.33%	30%
Industries of Expertise	Tourism Agriculture Light Manufacturing Financial Services	Tourism Agriculture Light Manufacturing Information Processing	Tourism Agriculture Light Manufacturing Financial Services	Tourism Agriculture Light Manufacturing Financial Services	Tourism Agriculture Light Manufacturing Financial Services	Tourism Agriculture Light Manufacturing Petroleum & Natural Gas Production

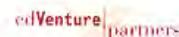
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EASTERN EUROPE						
	Estonia	Latvia	Lithuania	Poland	Czech Republic	Slovakia
GDP (Billions USD)	11.2	13.6	22.3	242.3	107.0	41.1
GDP Growth	7.8%	8.3%	6.7%	5.4%	4.4%	5.5%
Inflation	3.1%	7.2%	3.3%	2.9%	3.0%	4.6%
Unemployment Rate	7.9%	7.5%	4.8%	16.2%	8.9%	11.7%
Total FDI (Billions USD)	0.7	0.31	0.13	4.9	3.6	0.52
Total Labor Force	670,000	1.11 million	1.61 million	17.1 million	5.27 million	2.24 million
Literacy Rate	99.6%	99.8%	99.6%	99.8%	99%	99.6%
English Proficiency	Good	Good	Good	Good	Good	Good
Level of Government Regulation	Low	Medium	Medium	Medium	Medium	Medium
Corporate Income Tax Rate	24%	15%	15%	19%	26%	19%
Industries of Expertise	Engineering Textiles IT Telecom	Agriculture IT: Parts Assembly Manufacturing: Parts Assembly Heavy Manufacturing	Food Processing IT: Parts Assembly Manufacturing: Parts Assembly Heavy Manufacturing	Iron/Steel Mining Food Processing Textiles	IT (Software Development) Telecom: Call Centers Glass Production Heavy Manufacturing	Manufacturing: Parts Assembly Telecom: Call Centers Design Materials: Ceramics Manufacturing: Automotive

EASTERN EUROPE						
	Croatia	Slovenia	Bulgaria	Hungary	Romania	Turkey
GDP (Billions USD)	34.3	32.2	24.1	100.7	73.2	302.8
GDP Growth	3.8%	4.6%	5.6%	4.6%	8.3%	8.9%
Inflation	3.3%	3.0%	4.2%	4.6%	15.8%	9.9%
Unemployment Rate	18%	10.1%	11.5%	7.2%	5.9%	10.2%
Total FDI (Billions USD)	1.6	0.11	1.3	3.4	1.4	1.6
Total Labor Force	1.71 million	920,000	3.34 million	4.18 million	9.31 million	24.7 million
Literacy Rate	98.5%	99.7%	98.6%	99.4%	96.4%	86.5%
English Proficiency	Good	Good	Good	Good	Good	Poor, but widely used in business
Level of Government Regulation	High	Low	High	Medium	High	High
Corporate Income Tax Rate	20%	25%	15%	16%	16%	30%
Industries of Expertise	Tourism Chemicals Electronics Textiles Design Materials: Wood Products Automotive Petroleum Refining Food Processing Shipbuilding	Textiles Chemicals Design Materials: Wood Products Manufacturing: Automotive Manufacturing: Metals Processing	Petrochemicals Heavy Manufacturing Agriculture	IT (Software Development) Telecom: Call Centers Mining Textiles Pharmaceutical Chemical Production	Iron/Steel Textiles Timber Energy Financial Services Real Estate IT (Software Development)	Textiles/Clothing Food Processing Manufacturing: Automotive Electronics Mining Iron/Steel Petroleum

Sources: GDP and inflation statistics from the World Bank (except for Bahamas, Barbados, Bermuda, and Cayman Islands where statistics are from CIA's World Factbook). Labor force, unemployment and literacy rate statistics from the Central Intelligence Agency's (CIA's) World Factbook. English proficiency statistics from the World Bank, the U.S. State Department and the European Commission. FDI and level of government regulation statistics from the Heritage Foundation. Corporate income tax rate statistics from Ernst & Young 2005 Worldwide Corporate Tax Guide. Industries of expertise information compiled from the sources listed above plus United Nations Conference on Trade and Development.



APPENDIX II: Detailed Country Competitive Characteristics China, India, Eastern Europe, Jordan, Mexico, and Caribbean

China
For U.S. firms looking to establish offshore operations, China is a top-of-mind location. The rapid growth of the Chinese economy has created opportunities for foreign companies to set up operations in China and has driven FDI to record levels. Currently the second largest economy globally when calculated with Purchase Power Parity, PPP, China's GDP is slightly less than \$9 T. The economy continued to grow at nine 9% again in 2005, driven by high export and investment growth. The two biggest events in China's economic life in 2005 were the shift to valuing the national currency, the yuan, against a basket of currencies instead of the US dollar alone and the National Economic Census results, which revealed that China's 2004 GDP was 16.8% larger than previously thought. The inflation rate remained a remarkably low 1.8% throughout 2005.⁵

For the first time since 1999, the amount of actual FDI flowing into China fell by 3.42%⁶ in the first seven months of 2005 compared with the same period last year. This may reflect Beijing's effort to cool off the economy following a period of what was considered unsustainable growth. In spite of this trend, the United States remained the fifth-largest source of FDI in China. This indicates that the rise in recent negative political sentiment toward China has had little effect on American investors and suggests that actual FDI inflows from the United States are likely to rebound in the near future.

While the Chinese economy is no doubt a hot investment for foreign entities, there remain significant hurdles to setting up successful offshore operations in the country. Intellectual property rights continue to remain problematic as U.S. firms commonly find their patents, trademarks, and processes unlawfully copied. Transparency has also emerged as one of the most important issues facing a wide variety of U.S. companies operating in China. Transparency in government policies and procedures is critical for company and product registration, venture funding, exporting and importing, labor management, and raw materials sourcing. Long, complex, and unclear policies slow the speed at which new businesses can get up and running and impede the flow of products and services between the U.S. and China.

Reports have circulated this year that overcrowding in popular investment zones has resulted in an increase in the cost of land and utilities. Approvals of new projects have slowed as zone officials have reviewed contracts in light of these shortages. The entire coastal region faced blackouts during the summer months of 2005, and the problem is likely to persist until 2007 when new power sources come online. Once the energy crunch is addressed, water shortages will likely loom as the next major resource concern.

China is losing its distinction as a place to find inexpensive, skilled labor, particularly in coastal areas. Private Chinese companies are beginning to pay competitive salaries for top talent, and many foreign companies find that they train staff only to watch them jump ship for more senior positions in domestic firms. A combination of improving educational standards and greater affluence, together with the one-child policy, means that China's workforce is set to decline over the next generation. From increasing by an average of nearly 8 million a year between 1995 and 2005, the mainland's labor force will actually decline by 11 million workers between 2005 and 2015, according to press reports. Even so, today China's workforce is .74 B employees.

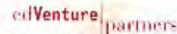
Despite the high risk and daily challenges, China still holds a lot of appeal for foreign companies looking to offshore. At an average of 13%, foreign investors in China now enjoy one of the lowest tax rates in the world.¹⁰ The government has continued to invest heavily in transportation infrastructure, including inland roadways, airports, and shipping ports. By the end of 2006, significant liberalization is expected in the insurance, banking,

⁵ All GDP and country economic statistics cited from the World Bank unless otherwise noted.

⁶ All FDI statistics from the U.S. Department of State unless otherwise noted.

¹⁰ All tax rate references from KPMG, "Corporate Tax Rate Survey" Unless otherwise noted.

Case Study



telecom, retailing, architectural and engineering industries. These changes are likely to increase the country's appeal among U.S. firms looking for inexpensive offshore locations. (See fig. 4 for an overview of China's economic statistics.)

India

A young demographic profile coupled with a rise in private enterprise has had a tremendous effect on the Indian economy in the past decade. Today, India is perceived as the most favorable investment destination for U.S. firms. With a population of around 1.05 billion, a workforce of 496 million, a resource-rich landmass, the ninth largest manufacturing economy, and the fourth largest economy in terms of total GDP with PPP India is a booming economy. The last decade has witnessed an annual average GDP growth rate of around 6% per annum.

A major appeal of India is that the economy encompasses a wide spectrum of economic activity, ranging from high technology to manufacturing to mining to food processing. India has capitalized on its renowned science and math-focused education system by developing the largest IT skilled labor pool in the world, excelling in software and application development, network infrastructure, and e-commerce. Indigenous technological achievements extend to fields such as nuclear energy, space and satellite communications, superconductors, and deep sea oil drilling.

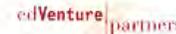
Until recently, foreign investment in India remained closely regulated. In the early 1990s the Indian government set about a process of radical economic reform. This has involved opening up the economy to foreign investment, relaxing foreign exchange controls, and allowing substantial liberalization in the financial sector. Today most sectors have been opened for 100% foreign investment. Foreign investors can take advantage of operating in one of eight duty-free export processing zones (EPZs), or in one of India's many Software Technology Parks (STPIs) where office and manufacturing space is subsidized. The strategy appears to be working, as FDI has made solid yearly gains in the past decade. Inflows totaled \$4.3 billion in 2005 accounting for 0.9% of India's GDP. The U.S. is the second largest investor in India.

Investing in India, however, is not without risks and challenges. India's leadership in global outsourcing may be in jeopardy unless it can increase its supply of low-cost skilled workers. India's solid education system churns out more than a million English-speaking college graduates yearly who historically have been happy to work for a fraction of the salary of their American counterparts. Unfortunately economic growth has begun to outpace the rate of new entrants into the labor pool. With their skills in high demand worldwide, India's university-educated labor pool will soon be in short supply. The supply shortfall is most acute in mid-level jobs, like software engineers. Salaries in this segment are already increasing an average 20%-50% a year, and turnover rates are getting higher.

While India has a stable democracy and a solid economy, its government struggles with myriad of social problems. Approximately 30% of Indians are believed to live below the poverty line and the overall literacy rate is only 52%. In an effort to fund initiatives to address these issues, India's Union Ministry of Finance attempts to increase tax revenues by adopting new tax policies with considerable frequency. The corporate tax rate on foreign companies is high at 40%, and the peak customs rate on exports can get as high as 30%. The desire for infrastructure improvements place additional burdens on the corporate tax system. Roads, railways, airports, and ports form the backbone of India's growing economic engine. According to the Indian government the country's infrastructure and transportation sectors require nearly \$150 billion USD in investment over the next 7-8 years to maintain India's growth and develop a world-class infrastructure. (See fig. 4 for an overview of India's economic statistics.)

Eastern Europe

Central and Eastern European (CEE) countries are an increasing part of the global trade in goods and services. Individual CEE countries are positioning themselves as good locations for hosting service and business process centers as well as manufacturing facilities. Moreover, economic growth, regulatory reforms, liberalization, and



privatization have created a highly competitive environment that has become a breeding ground for local firms to establish themselves as providers of technology-centric services. Particularly for firms from Western Europe, this region has established something of a fledgling 'nearshore' industry for firms that want the offshore cost savings without going as far as India.

The big draw for off-shoring in CEE countries is the ability to negotiate labor problems. The region has a large, well-educated, multi-lingual workforce that demonstrates high productivity levels at significantly less cost than similarly skilled employees in Western Europe or North America. Many countries have long-established universities that turn out highly skilled technical graduates (a legacy of the communist era) and the gross monthly salary for white collar employees is about one-third of the average in Western Europe.

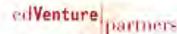
Governments in the region have been quick to recognize the value of FDI as it relates to economic growth. Significant incentives to attract FDI are present in every country in the region. Taxation on corporate profits is lower than it is in North America and Western Europe, with several countries offering tax exemptions on profits that are reinvested in the companies' operations in the host country, or exemptions for new businesses for up to ten years. Governments also commonly offer grants for retraining labor, construction and real estate purchases. Special economic zones with rent-free technology or industrial parks, reduced tariffs, and tax exemptions are prevalent.

The region has enjoyed robust economic growth over the last few years. Eight countries (the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, and Slovenia) joined the European Union in 2004. Two more (Bulgaria and Romania) are scheduled to enter the EU in 2007, while Croatia and Turkey are currently in negotiations for eventual entry. The strong economy is evidenced by the fact that GDP for the region as a whole grew by 6.8% in 2005. Trade volumes also expanded substantially with export volumes increasing by 15.3%. FDI to the region is estimated at just over \$20 billion USD. The upturn of the economy has not been accompanied by comparable social progress, however, and in many cases has increased disparities between and within countries.

The transition countries in the Western Balkans and the Commonwealth of Independent States that were part of the former Soviet Union are still struggling with social disruptions that accompanied the moving away from centrally planned economies. These countries have continued to be characterized by inflationary pressure, high poverty rates, income inequality, long-term unemployment, and declining access to public services. The number of refugees in the region has also grown rapidly in the past decade, creating significant social challenges. Notably, gender inequities have risen in the last decade. Women's participation in economic and political life has decreased, income disparities have increased and girls' school enrolment has slowly fallen. Gender-based violence in the region, including the rise in human trafficking, which primarily affects women and girls, constitutes a severe human rights and public health problem.

Infrastructure challenges are common in the region as well. Most of the countries in the region emerged from the long period of communist rule with substantial and, in some cases, massive infrastructure. Years of substantial public investment in utilities, roads and other infrastructure as well as the rapid construction of natural gas networks and power generation and transmission facilities during the 1970s and 1980s provided the capacity for large-scale supply of energy and infrastructure services to the economy. However, for most CEE countries, the shift from centrally planned to market-based economic systems caused the traditional structures of the infrastructure and energy sector to become increasingly unsustainable. Most countries were unable to afford infrastructure upgrades in the 1990s and airports, railways, and roads deteriorated. Progress toward commercialization within an appropriate legal and regulatory environment is highly uneven. While there is considerable foreign and domestic private sector interest in participating in some energy and infrastructure sub sectors in the region, the readiness of private operators to take the associated commercial and political risks is low, and the willingness of governments to embrace the private sector varies significantly between countries. (See fig. 4 for an overview of the region's economic statistics.)

Case Study



Jordan

Jordan is a small Arab country, which follows a pro-Western foreign policy. The country has relatively few natural resources and is currently trying to expand its limited water supply by using those scarce resources more efficiently and through regional cooperation. The country also depends on the surrounding region for the majority of its energy supply. The country is bordered by Iraq, Israel, Saudi Arabia, and Syria. Following the fall of the Iraqi regime, Jordan's economy has benefited by increased trade and reconstruction efforts in Iraq. While the official language is Arabic, English is used widely in business and government making language less of a barrier.

Since assuming the throne in 1999, King Abdallah II has refocused the government on economic reform. These steps allowed Jordan to join the World Trade Organization in 2000, and for the country to enter into an association agreement with the EU in 2001. The U.S. expressed its commitment and confidence in Jordan's economic growth by entering into a Free Trade Agreement, similar but not identical to the Morocco-U.S. FTA. The FTA went into effect in December 2001, and it will eliminate nearly all tariff and non-tariff barriers to bilateral trade in almost all industrial goods and agricultural products by 2010. It provides for open markets in communications, construction, finance, health, transportation, and services, as well as an application of international standards for protection of intellectual property. The FTA also contains trade-related environmental and labor provisions.

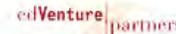
Changes in Jordan's economic policies have transformed the country from a state-controlled, highly indebted economy into one with more focus on foreign investments and with the private sector playing a more important role in economic development. Although the government promotes foreign investment and has no formal screening process, there are still several restrictions. On any one investment there is a minimum capital requirement. In many industries the FDI may not exceed 50 percent, and in some industries, foreigners are prohibited from investing altogether.

Despite recent reforms, the Jordanian economy still struggles with debt, poverty, and unemployment, and its challenges continue to be reducing the budget deficit, reducing the dependence on foreign grants, and creating incentives for investment to promote job creation. Its labor force is a mere 1.29 million, and the unemployment rate is estimated at 13.4%. Approximately 84% of the workforce, is employed in services. The remainder is employed in industry and agriculture. The per capita GDP was \$2,146 for 2004, and education and literacy rates are relatively high compared to other countries with comparable income.

Economic growth has been driven by exports of light manufactured products, such as textiles and garments, which are manufactured in the Qualifying Industrial Zones and enter the U.S. tariff and quota free. Information technology (IT) and tourism are other promising growth sectors identified by the Jordanian government. Since the FTA went into effect, U.S.-Jordanian trade has increased 37%, and the U.S. is currently Jordan's largest export market. Jordan presents a good model for Morocco's anticipated trade relationship with the U.S. as it continues on the path of economic reform and increased trade. The country's economy is vulnerable to political unrest in the region, which may impact its economic growth. Since the peace treaty was signed with Israel in 1994, Jordan has continued to act a moderate force in the region. (See fig. 4 for an overview of the region's economic statistics.)

Mexico

Mexico has a free market economy in the trillion dollar class, which contains a mixture of modern industry and agriculture. Almost one quarter of Mexico's total population of 100M depend on subsistence agriculture, but agriculture only accounts for about 4% of its GDP. Many Mexican farmers are trying to transition to off-farm employment. In northern Mexico there are over one million Mexicans working in maquiladoras manufacturing parts and products for the U.S. including automotive parts. Mexican labor is inexpensive and thanks to NAFTA, taxes and custom fees are almost nonexistent. In recent years competition from China has led to a substantial loss of jobs, and many plants have been forced to close. This has added to the situation of many Mexican workers illegally entering the U.S. and working without proper documentation in the U.S. The second largest source of external funding is derived through reimbursements from Mexicans working in the U.S.



Mexico participates in several international organizations and is a founding member of the World Trade Organization. The country has Free Trade Agreements with over 40 countries, including the U.S., Canada, and the EU, and its trade policy is among the most open in the world. The North American Free Trade Agreement (NAFTA), implemented in 1994, has allowed trade among the North American countries to triple, and investment flows have skyrocketed. In 2005 the NAFTA countries formed the Security and Prosperity Partnership (SPP) to further develop cooperation and improve security, competition, and economic resilience.

Mexico's proximity to the U.S. makes the relationship between the two countries unique. Mexico's stability and economic success are essential to U.S. interests. Mexico is highly dependent on exports to the U.S., which accounts for approximately 88% of its exports and almost a quarter of the country's GDP. As a result the Mexican economy is tied to the U.S. business cycle and has emerged successfully from the 2001 downturn just like its northern neighbor. Main exports to the U.S. include petroleum, cars, and electronic equipment. There are more than 2,600 U.S. companies operating in Mexico, and the U.S. accounts for over half of the FDI in Mexico.

Even though Mexico maintains several formal restrictions that hinder foreign investment, the country is second only to Brazil in receipts of FDI in Latin America. The U.S. Department of Commerce reports that "Foreign firms continue to list bureaucracy, slow government decision-making, lack of transparency, a heavy tax burden, and a rigid labor code among the principal factors inhibiting investment in Mexico."

There have been a number of political and economic reforms in recent years, but the country still struggles with inefficiency and corruption. There is also a need to upgrade infrastructure, modernize the tax system and labor laws, and allow private investment in the energy sector. Mexico will also continue to face the challenges of reducing poverty, and improving economic growth. (See fig. 4 for an overview of the region's economic statistics.)

Caribbean

The appeal of the Caribbean as an offshore location for U.S. firms is due not only to its reputation as a tax haven, but the region's proximity to the U.S. and the expanding economy. The economy of the Caribbean region grew for the third consecutive year in 2005. Regional GDP expanded by an estimated 4.3%. This expansionary phase of the business cycle is expected to continue into next year, although the growth rate is likely to be slightly lower (4.1%). From a historical standpoint, this growth phase is an extremely positive development for the Caribbean, but the fact remains that most of the economies in the region are growing more slowly than those in other regions of the world, and in some cases even more slowly than developed economies.

A main factor of economic growth in this decade has been foreign investment, with gross fixed capital formation rising by 10% in the region as a whole. FDI, however, is still relatively low compared to other areas of the world and is not climbing fast enough to fuel an economic boom that could resolve the problems relating to unemployment and the population's general well-being that persist in the region. Nonetheless, the improvement in economic conditions has begun to carry over into the labor market. The upturn in employment made possible by the economies' expansion, in combination with the slower growth of the labor supply (owing, in part, to the fact that fewer young people are joining the workforce) has pushed the unemployment rate down from an average of 10% to nine percent.

The Caribbean business environment offers attractive features to the potential investor: many have stable democratic governments, relief from personal and corporate income taxes, timely repatriation of corporate profits, proximity to the United States with extensive air and telecommunications links, and a pool of skilled professional workers proficient in the English language and familiar with U.S. culture. The governments of the region have made efforts to welcome foreign investment, developing incentives to attract more offshore business in tourism, banking, and light manufacturing. Transparency in government policies simplifies the

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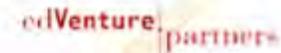


process of establishing a business and as a result the average time it takes to establish a fully functioning business is 85 days.

Popular offshore locations in the Caribbean include Bermuda, Cayman Islands, the Bahamas, Trinidad and Tobago, Barbados, and Jamaica. In 2004, FDI inflows into the Caribbean rose for the first time in five years. In 2005 they reached over \$10 billion. However, they were still far below their average of the second half of the 1990s when large-scale privatizations and cross-border acquisitions of private firms triggered an FDI boom.

Despite the region's attractiveness to foreign investors, there remain risks for U.S. firms. The quality of infrastructure varies from country to country and outdated and run-down roads, airports, and shipping ports can prove difficult for transporting goods in a timely manner. Electricity is generally reliable, although many businesses have their own backup generators, as outages are a frequent occurrence. Telecom infrastructure is generally good, but again is inconsistent from country to country. The region's susceptibility to natural disasters (hurricanes, volcanoes) makes many firms weary of placing mission critical business functions in the area. Perhaps the biggest challenge in the region is the acquisition of inexpensive skilled labor. Compared to large economies like India and China, the size of the labor pool in Caribbean countries is small and the expected wages high. (See fig. 4 for an overview of the region's economic statistics.)

Round 1 Scorecard



Brand Morocco National Case Study Competition Judging Scorecard

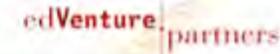
University:
Level (Undergraduate or MBA):
Industry:
Entry # (refer to CD cover):
Term: Fall
Year: 2006
Judge:

Judging Sheet Instructions:

Use this judging sheet to evaluate basic criteria for each section of the case study competition, and the overall presentation of results. There are 3 sections, worth 20, 70, and 10 points respectively, making 100 the maximum point total possible. Once you have commented, evaluated and assigned a point total for each section, please add up the total score and include it in the space provided at the end of the judging sheet. Some of the judging categories are subjective and may require further inquiry and/or debate.

The physical appearance and presentation of the IMC is worth up to 10 additional points.

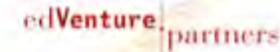
Round 1 Scorecard



Task #1 – Primary and Secondary Research	Comments	Score
Ability to answer bullet #1: Morocco's culture, economics and history (5 points)		
Ability to answer bullet #2: Target Audience (5 points)		
Ability to answer bullet #3: Competition (5 points)		
Ability to answer bullet #4: Success Stories (5 points)		

(20 Points Possible) Score: _____

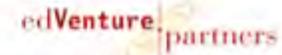
Round 1 Scorecard



Task #2 – IMC Plan	Comments	Score
<p>Covered key components to IMC plan:</p> <ul style="list-style-type: none"> • Background/situation summary • Competitive overview • Target market profile • Overall marketing objective • Marketing tactics • Specific media plan recommendations • Overall budget • Creative execution of all advertising campaigns and writing samples for PR pieces <p>(40 points)</p>		
<p>Research findings from Task #1 justify plan elements</p> <p>(15 points)</p>		
<p>Relevant and strategic to target market (key decision makers, but keeping in mind end consumer)</p> <p>(10 points)</p>		
<p>IMC plan professional creative, original and innovative</p> <p>(5 points)</p>		

(70 Points Possible) Score: _____

Round 1 Scorecard



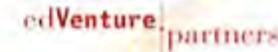
Format of Submission	Comments	Score
Appearance of Final Report (5 points)		
Sequence, Relevancy and Concise Content (5 points)		

(10 Points Possible) Score: _____

(100 Total points possible) Total Score: _____

Judge Initials: _____

San Diego Scorecard



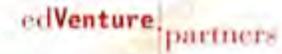
Brand Morocco National Case Study Competition Final Competition Presentation Judging Criteria

Judging Sheet Instructions

Use this judging sheet to evaluate the presentation of the case study project carried out by the student team. There are 5 criteria to be judged as well as potential bonus points based on their performance during the Q&A period. Students have 25 minutes to make their presentation followed by 5 minutes for Q&A. Timeliness is important so please keep your comments and questions succinct and to the point. Once you have evaluated and assigned points, please add up the total score and include in the space provided at the end of the judging sheet. Some of the judging categories are subjective and may require further inquiry and/or debate. There will be ample time following all presentations to meet with the students and their faculty members to discuss their experiences in carrying out this project.

Criteria	Comments	Score
Covered key components to IMC plan: <ul style="list-style-type: none"> • Background/situation summary • Competitive overview • Target market profile <ul style="list-style-type: none"> ◦ Plan relevant, realistic and strategic to key decision makers and, where appropriate, end consumer • Overall marketing objective • Marketing tactics • Specific media plan recommendations • Overall budget • Included success stories • Creative execution of all advertising campaigns and writing samples for PR pieces (40 points)		

San Diego Scorecard



<p>Overall creativity of IMC plan</p> <ul style="list-style-type: none"> Did they provide hard copy or electronic examples? <p>(35 points)</p>		
<p>Integration of research content into presentation to justify plan elements</p> <p>(15 points)</p>		
<p>Clarity of speech</p> <p>(5 points)</p>		
<p>Professional appearance</p> <p>(5 points)</p>		

NOTE: Ask yourself if you would be proud to send this team to Morocco.
Feel free to add or deduct points based on the Q&A.

(100 Points Possible) Total Score: _____

San Diego Presentation Agenda



Brand Morocco National Case Study Competition

**Final Presentations
December 15, 2006**

<p>Industry: Design Materials Bellevue University Professor: Heather Nelson</p> <p><u>Team Members:</u> Jodi Tripp Cory Kusleika Kelly Carpenter Nanci Borg Aretha Prodjinotho</p>	<p>Industry: Textiles/Apparel Virginia Tech Professor: Dr. Eloise Coupey</p> <p><u>Team Members:</u> Kimberly Elliott Bryan Collier Pedro Vasquez Caroline Trowbridge Matthew MacKimmie</p>
<p>Industry: Processed Foods Indiana University, South Bend Professor: Dr. Monle Lee</p> <p><u>Team Members:</u> Anna Mae Smith Mela Freeman April Miller Brian Miles Makeisha Wilson</p>	<p>Industry: Manufacturing Cascade College Professor: Mike Griffith</p> <p><u>Team Members:</u> Sean Adams Jessika Anderson Shalina Cale Ken Counts Logan Crumrine</p>
<p>Industry: Information Technology Johnson & Wales Professor: Peter Lohaus</p> <p><u>Team Members:</u> Garrett Schopper Christopher Barone Jonna Stroup Juel Brin Dominic Hitton</p>	

Judges:

- o Dr. Ted Smith, President of MATIC
- o Mr. Adil Embarch, Economic Counselor to Embassy of the Kingdom of Morocco
- o Mr. Mohamed El Mandjra, Executive Vice President, Masimo Corporation, Irvine, CA
- o Mr. Rashid Choufani, Chairman/CEO of E. Brands
- o Dr. George Belch, Chair, Dept of Marketing
- o Dr. Lois Olson, SDSU professor
- o Dr. Richard Brooks, Director of IMC Centre, SDSU

Attendees:

Moroccan American Trade & Investment Council:

- o Mr. Jean AbiNader, Managing Director
- o Mr. Amine Maouni, Research Associate

IMC Centre

- o Dr. Mickey Belch, Facilitator

EdVenture Partners

- o Mr. Tony Sgro, CEO
- o Mr. Sean Ferrell, Director of Account Services
- o Ms. Rachel Moore, Account Supervisor
- o Mr. Lawrence Swayne, Program Specialist
- o Mrs. Alice Ostrovsky, Product Development

Prepared By:



“Building Industry-Education Partnerships”

Rachel Moore

Account Supervisor

619.758.9546

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