

Clusters & transformation strategy

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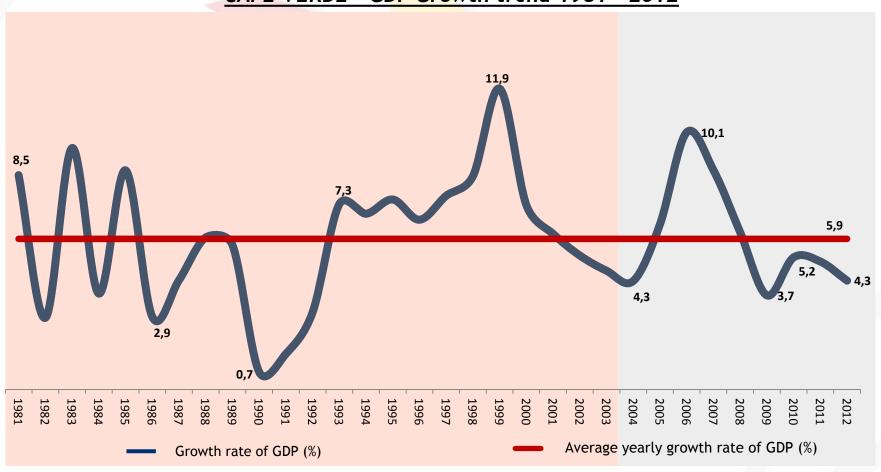
Praia, May 15, 2014

Cidade da Praia 14 a 16 de Maio de 2014

1980 - 2012: +5 to 6%



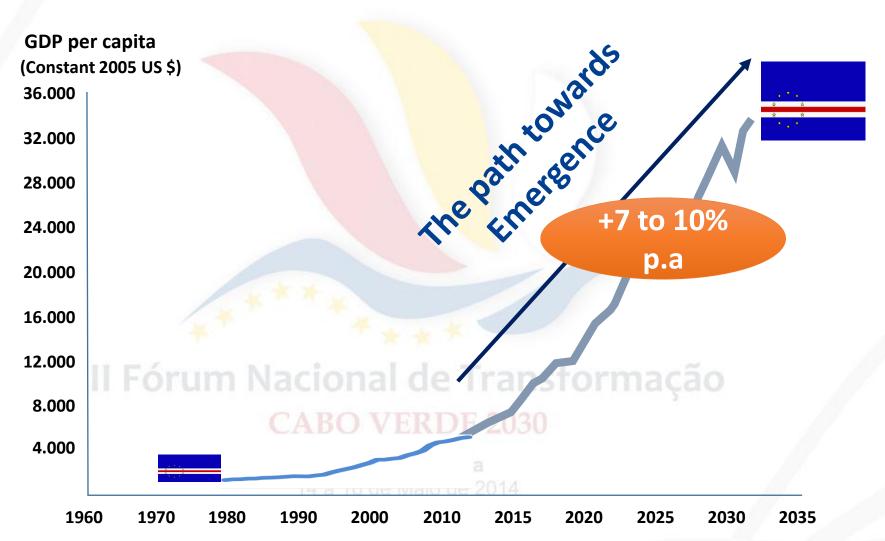
CAPE VERDE - GDP Growth trend 1981 - 2012



Source: Institute of statistics of Cape Verde and World Bank

2014 - 2034?

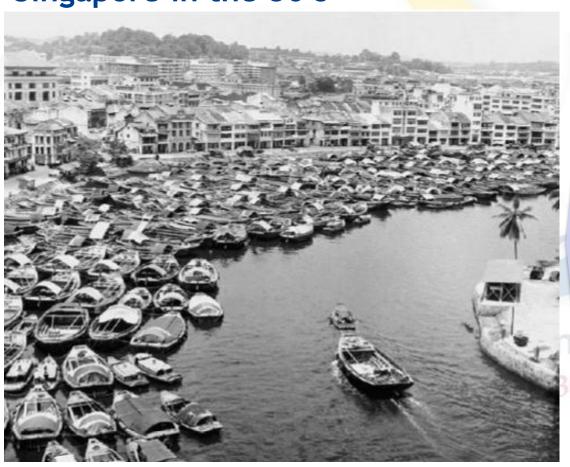




The Asian Tiger did it (Singapore)



Singapore in the 50's

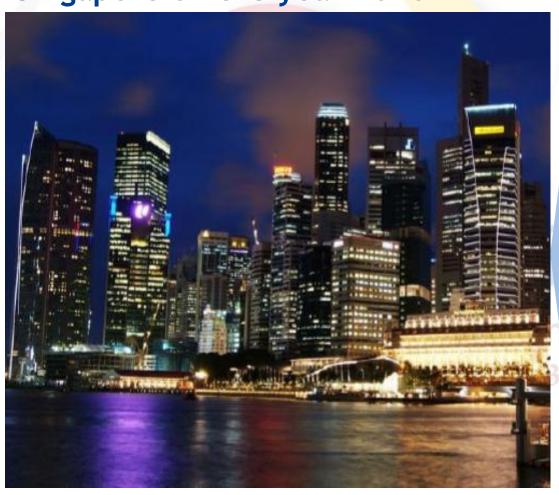


- Historically strategic position (« Gibraltar of the east »)
- Weak economy (500 \$ nominal GDP per capita in 1965)
- Poor living conditions
 one of the worst
 slums in the world at
 that point of time

The Asian Tiger did it (Singapore)



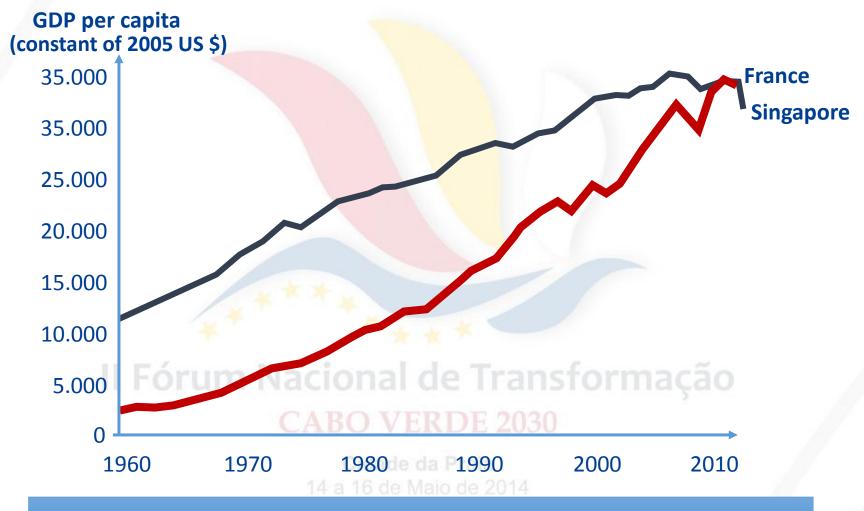
Singapore on the year 2010



- One of the most free, innovative and competitive economies in the world (52 000 \$ nominal GDP per capita in 2012)
- One of the best places to live in.

The Asian Tiger did it (Singapore)





A NEW AMBITION AND A FUNDAMENTAL CHANGE IN METHOD!

Source: Banque Mondiale

Nations prosper if they develop competitive clusters.

Dortmund

Francfort

Heidelberg

Pforzheim

Offenbach

Ingolstadt

Munich



Clusters of the German economy

Nuremberg

Regensburg



Dortmund, Essen, Düsseldorf

LOCKS

Velbert

CUTLERY

Solingen

CHEMICAL INDUSTRY

Leverkusen, Frankfurt,

Ludwigshafen

JEWELRY

Pforzheim

CHIRURGY INSTRUMENTS

Tuttlingen

TOOLS

Remscheid

OPTICAL INDUSTRY

Wetzlar

PRINTING PRESSES

Heidelberg, Würzburg

AUTOMOBILE

Stuttgart, Munich Ingolstadt, Neckarsulm,

MACHINE TOOLS

Stuttgart

PENS & CRAYONS

Nuremberg

The hidden part of the iceberg!



Main sectors

Sell products and services outside the region

Support activities

Companies providing raw materials , semi-processed products and services

Economic infrastructure

Human resources

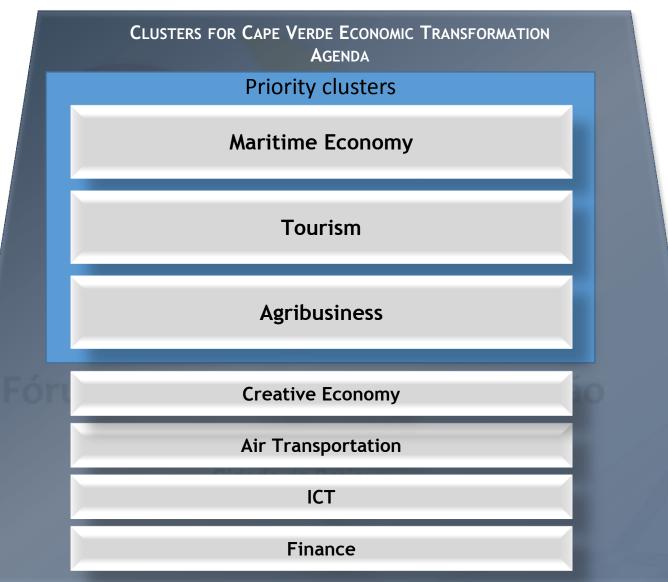
Technology

capital

Financing and Environmental regulation

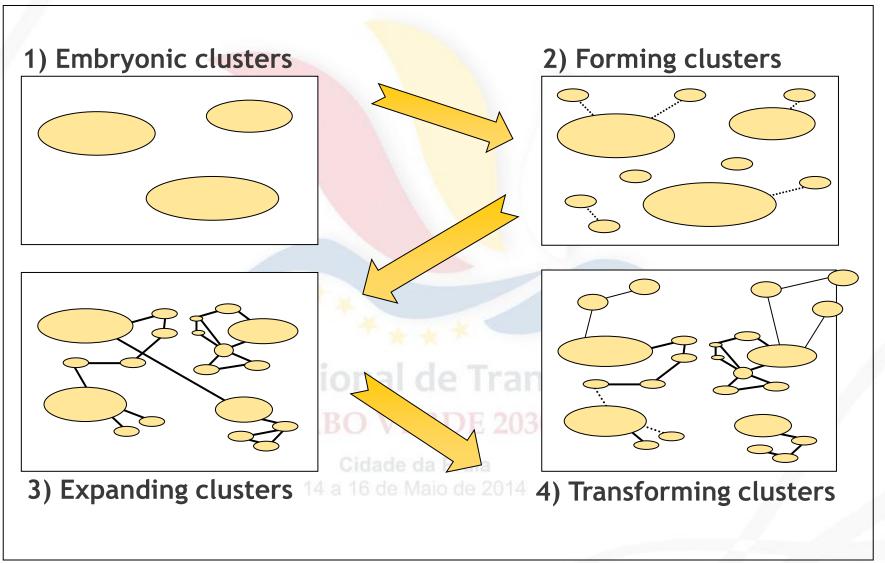
Seven clusters for the transformation Agenda of Cape Verde





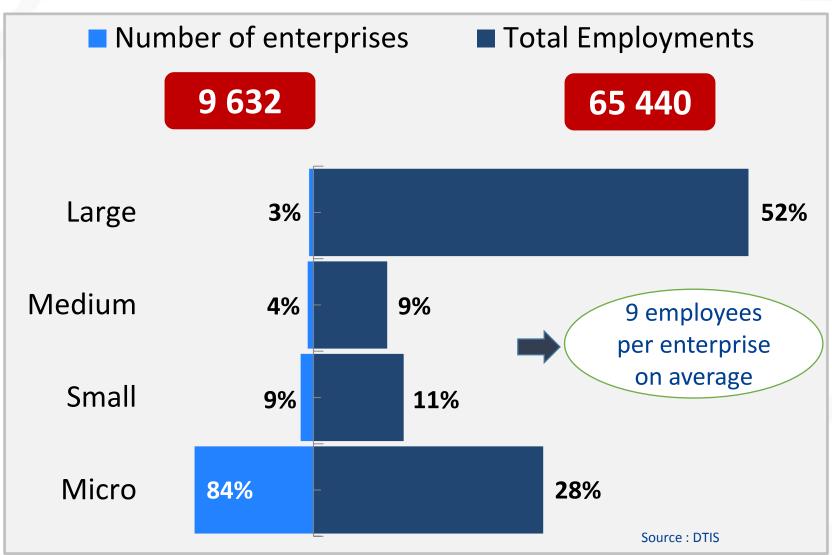
The 4 phases of cluster development





Mapping of Cape Verde economy





Micro – Up to 5 Employees Small – Between 5 and 10 Employees Medium – Between 10 and 50 Employees Large – More than 50 Employees

Tourism: a forming cluster



Core activities	Business tourism		Sea, sun & sand		Sports (diving, fishing, nautical)		Cultural events / festivals	
	Ecotourism		Cruises		Trekking			
Support activities	Air transport services			ansport a, land)		Hospit	tality	Crafts
	Digital services			Agr	icultui	re e	Construction	
	Regulatory		T	nsport			nancial	Visibility &

Basic infrastructure

Regulatory environment

Transport infrastructure

Natural

resources

ICT

system

Cultural heritage

Visibility & Promotion

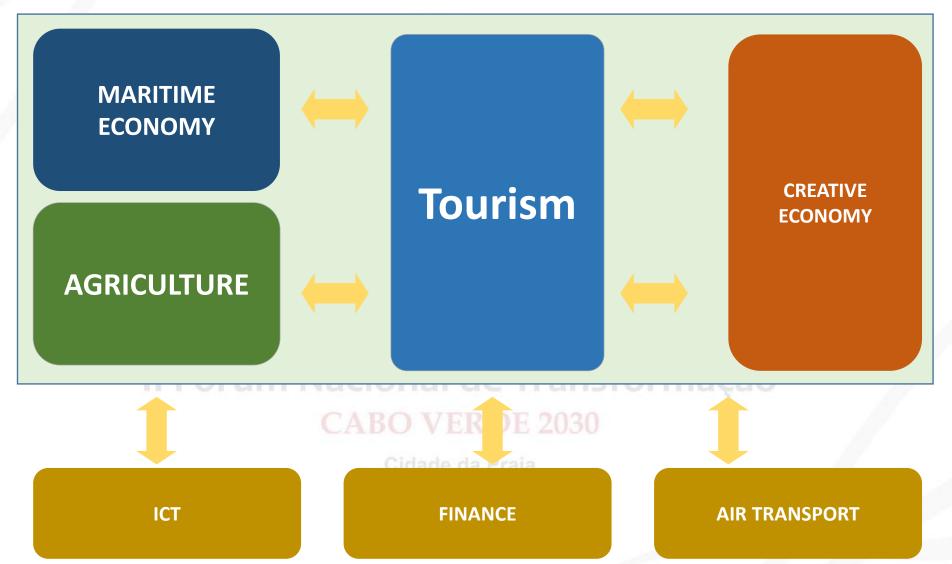
Human resources

Territorial planning and

allocation

Tourism cluster in Cape Verde: a key role for developing new clusters





3 other driving factors for the development of Cape Verde clusters 1) ENERGY and WATER



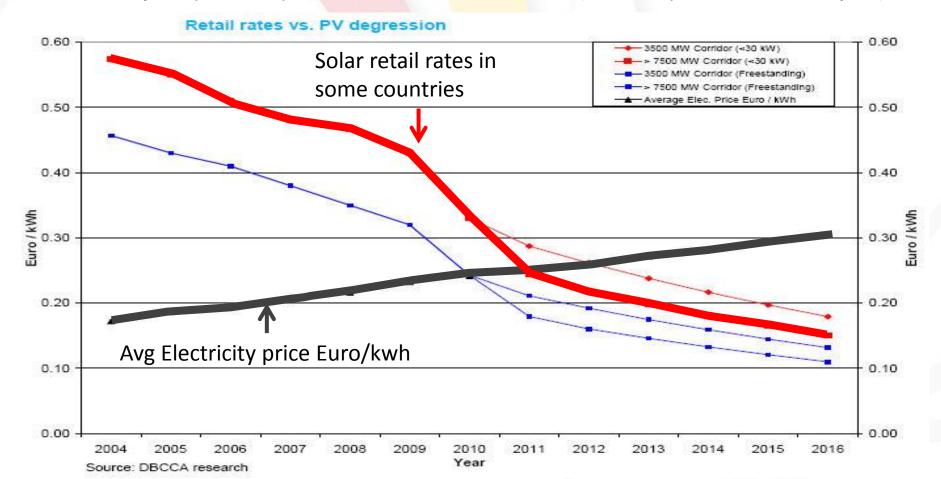


3 other driving factors for the development of Cape Verde clusters 1) ENERGY and WATER



A new era for solar energy

- Grid parity expected around 2030-2035.
- Grid parity already real in western countries (Germany, California, Japan)



3 other driving factors for the development of Cape Verde clusters

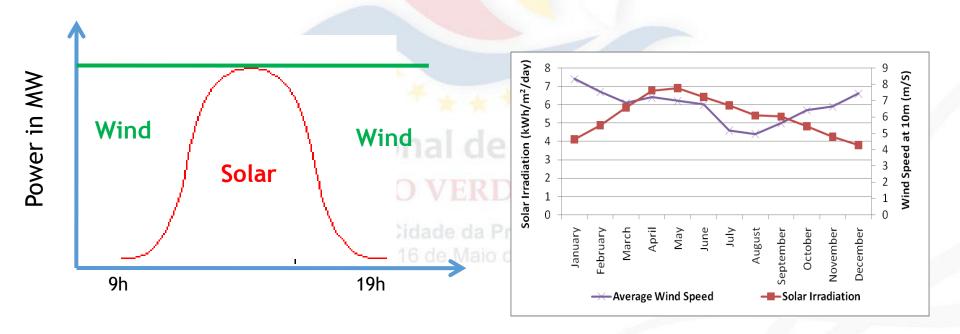


1) ENERGY and WATER

Cape Verde potential:

- Solar irradiation of 4 to 7 kWh/m²/day
- Wind Speed of roughly 4 to 7 m/s
- Ideal climate (temperatures between 22 to 27° C → Solar efficiency range)

Double Complementarity model conceivable



3 other driving factors for the development of Cape Verde clusters

Transport

2) CATALYTIC PARTNERSHIPS

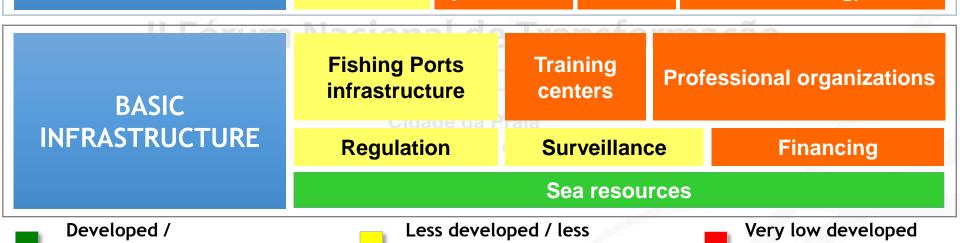
competitive



refueling)

or non-existent

Ex: Fisheries cluster of Central African Country Major industries processing fisheries products **CORE ACTIVITIES** Smoked fish and **Byproducts valorization industries** (food companies) salting companies **Fishing Artisanal Trade Packaging** fleet fishing activities services **SUPPORT** Vessels services(fairing, **ACTIVITIES** Support Logistics / **Control** services and maintenance, repair and



competitive

promotion

services

3 other driving factors for the development of Cape Verde clusters

2) CATALYTIC PARTNERSHIPS

competitive



or non-existent

		E	x: Fish	eries cl	uster o	f Central African (Country		
	Major industries processing fisheries products								
CORE ACTIVITIES	Fish smoking and salting companies			Byproducts valorization industries(food companies)					
SUPPORT	Fishing fleet	Artisa fishi			ade vities	Packagin services			
ACTIVITIES	Logistics / Transport	Support services and promotion		Contr service		Vessels services (maintenance, repair and refueling)			
BASIC	Disembarkation infrastructure		Training centers		Professional organizations of fishers and aqua culturists				
INFRASTRUCTURE	Regulation		Surveillance		ice	Financing			
	Sea resources								
Developed /	Le	ss develo	Very low developed						

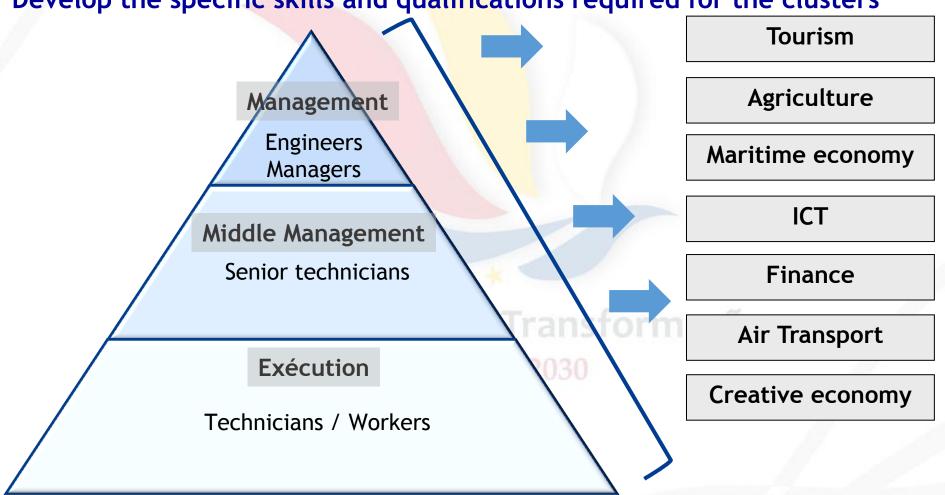
competitive

3 other driving factors for the development of Cape Verde clusters



3) PROFESSIONAL TRAINING

Develop the specific skills and qualifications required for the clusters



3 other driving factors for the development of Cape Verde clusters



3) PROFESSIONAL TRAINING

A shared public & private governance in training (Ex: Morocco)

National commission for professional training

Minister in charge of professional training

Department trainers
Professional organizations and chambers
Social partners

Provincial committee for professional training

Governors

Local stakeholders concerned

CAB

Development council

Department trainers

14:

Professional organizations and chambers

Social partners

A crucial first step: a detailed strategic and operational plan



A long term competitiveness strategy

Country vision

Strategic orientation

A detailed transformation agenda and a clear roadmap

Programs

Projects

Actions

An efficient implementation, monitoring and evaluation framework

Planification, Monitoring and Evaluation

Task Force Cluster 1 Task Force Cluster 2 Task Force Cluster 3 Task Force Cluster...

Task Force – Competitiveness factor 1

Task Force – Competitiveness factor 2

Task Force - Competitiveness factor...

Cape Verde has demonstrated its capacity to implement an ambitious transformation agenda

70's - 80's 90's 2000's 2010's +

Reconstruction Era Democracy Decade of success Emergence

Leadership & Mobilization



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Sustainable Economic diversification
Graduation to UPPER middle country
Inclusive growth
Competitiveness
Productivity & innovation
Value addition, etc.





II Fórum Nacional de Transformação CABO VERDE 2030

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