



KINGDOM OF MOROCCO



Ministry of Equipment, Transport, Logistics and Water



Moroccan Transport Infrastructures Strategy



Global Infrastructure Cooperation Conference (GICC 2017) – September 2017



First Part : Strenghts of Morocco as a platform for investment

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Second Part : Transport Infrastructure Strategies and action plan 2017-2021

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First Part

STRENGTHS OF MOROCCO AS A PLATFORM FOR INVESTMENT

Content

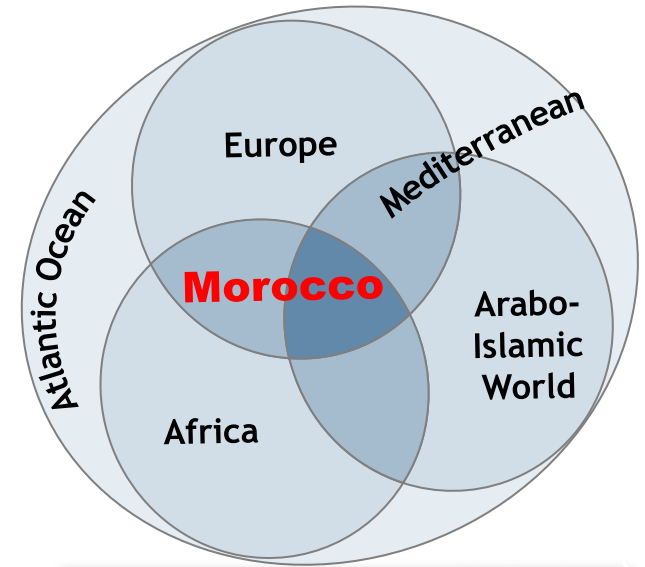
- An overview of Morocco
- Moroccan strengths and opportunities
- Mission and Organisation of the METLW
- High capacity of moroccan infrastructure
- Ambitious Evolution of the Investments in transport infrastructure

An overview of Morocco

A cross road of civilizations



At 15 km from Europe, Morocco is the main entrance to North of Africa. Most of the trade goes through Morocco, and the TANGER-MED port provides another advantage to the country.



An overview of Morocco

- ❖ **Surface** : 710 850 sq Km
- ❖ **Population** (2015) : 34Million inhabitants
- ❖ **Main cities** : Rabat (Capital), Casablanca, Meknès, Marrakech, Fès, Oujda, Agadir, Tangier, Laayoune,...
- ❖ **Languages** :
 - Official : Arabic & Tamazight
 - Business: French, English, Spanish
- ❖ **Currency** : Dirham (1 US Dollar # 9,8MDH).
- ❖ **Time** : GMT (GMT +1 in summer)
- ❖ **Climate**: Continental – Mediterranean



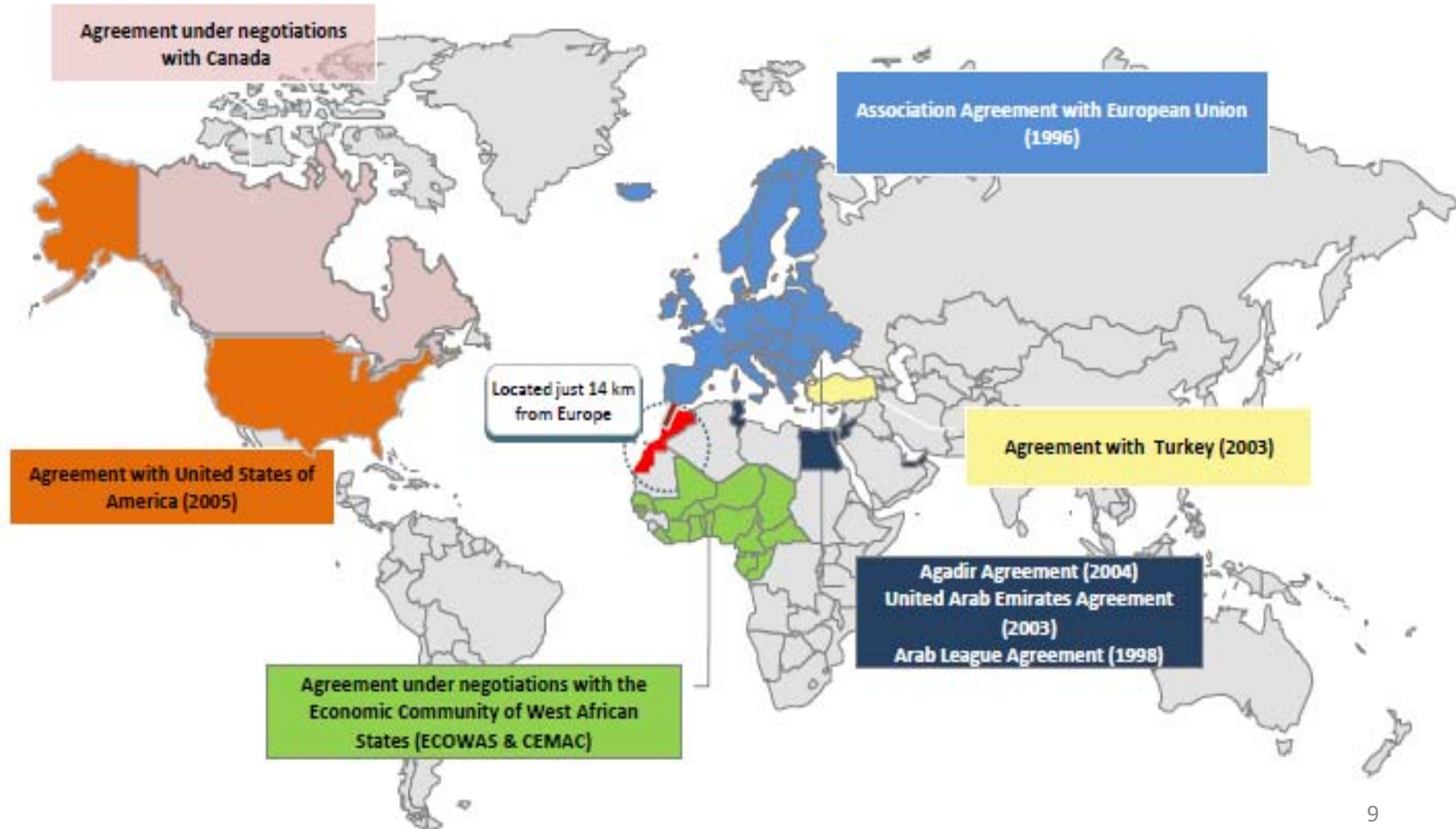
Moroccan strengths and opportunities

- ❖ Constitutional monarchy with democratic institutions
- ❖ Political and social stability
- ❖ Privileged geo-strategic position
- ❖ Excellent road infrastructure
- ❖ Efficient telecommunication network
- ❖ Developed port and airport infrastructures
- ❖ Developed industrial areas & facilities :
 - ➡ industrial free zones, parks and platforms
- ❖ Structured energy infrastructure
- ❖ Competent and competitive human resources
- ❖ Attractive legislative and institutional framework

Moroccan strengths and opportunities

- ❖ Moroccan economy in full development (private sector)
- ❖ Member of the World Trade Organization
- ❖ Several trade agreements  more than 56 countries :
 - a billion consumers and 60% of global GDP
 - FTA with EU, USA, EFTA, Turkey and most Arab countries
- ❖ Progressive tariff dismantling
- ❖ Relaxed freedom of exchange
- ❖ Each region with Regional Investment Centre :  “single window”
(one-stop shop)

Moroccan strengths and opportunities



Moroccan strengths and opportunities

- ❖ Morocco is a convenient gateway to serve the markets of the Maghreb and Africa
- ❖ Morocco has become a platform for countries and businesses looking for easier access to Africa
- ❖ Morocco provides a fertile field to develop exports to African countries
- ❖ Morocco offers the main advantage of its ability to meet the quality standards for complex products
- ❖ Morocco's economic and commercial potentials are insufficiently exploited by investors



Moroccan strengths and opportunities

Industry



50 MMDh

Agriculture



147 MMDh

Fishing



9.3 MMDh

Trade



900 MDh

Tourism



120 MMDh

Phosphat



145 MMDh

IT



5.2 MMDh

Energy



120 MMDh

Craft



2.8 MMDh

Mission and Organisation of the METLW

- The ministry develops and implements within the framework of the laws and regulations in force, the government policy in :
 - Transport infrastructure relating to the areas of road, port, railway, logistics and maritime.
 - Transportation on road, on rail and maritime.
- It is also responsible for defining the government's road safety policy and coordinating its implementation.
- The Ministry also provides, on behalf of other departments or territorial authorities, or public establishments if requested :
 - Technical aspect : the execution, supervision or control of studies ;
 - The realization of technical works or technical control for works granted or given in management.

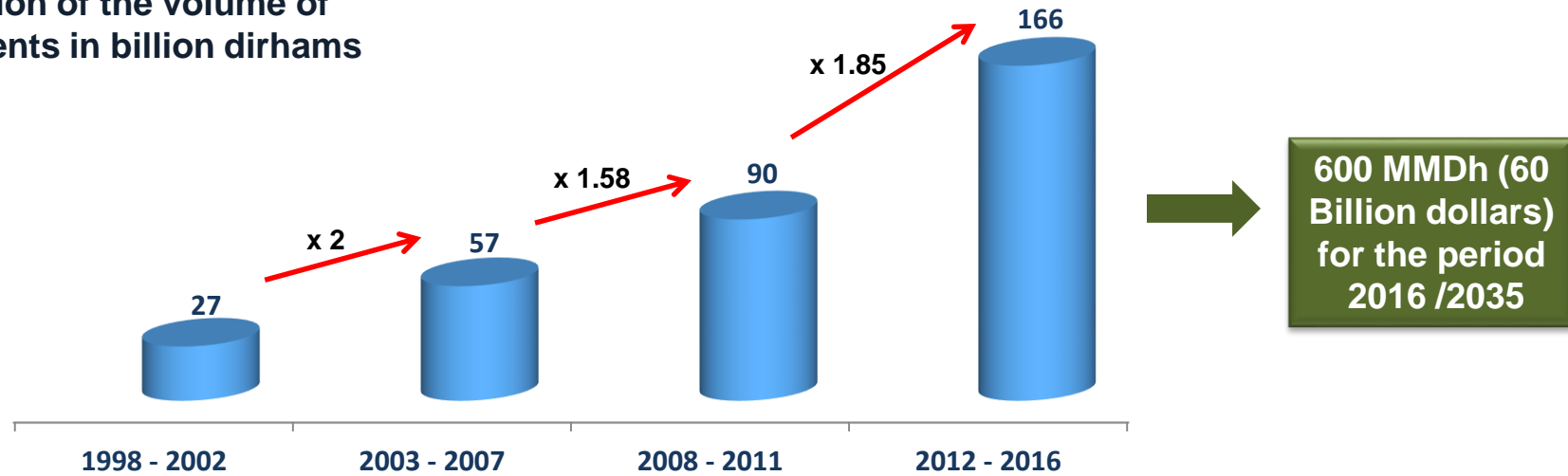
High capacity of moroccan infrastructure

- ▶ **Motorway network linking 10 largest cities (1770 km)**
- ▶ **2109 km of rail network**
- ▶ **First high-speed train in Africa (1500 km 2035)**
- ▶ **18 international airports**
- ▶ **40 ports including 13 commercial ports**
- ▶ **16 public universities**
- ▶ **22 new industrial zones**
- ▶ **3 large logistics areas (30 ha)**
- ▶ **An extensive network of dams**
- ▶ **New power plants for electricity production**
- ▶ **Production stations:**
 - ▶ **Solar Energy: 2000 MW (2020)**
 - ▶ **Wind Power: 2000 MW (2020)**



Ambitious Evolution of the Investments in transport infrastructure

Evolution of the volume of investments in billion dirhams



Sectors	Investments volume Billion dollars
Roads	2.61
Motorways	1.58
Railways	2.75
Seaports	2.85
Airports	0;5
Logistics	6.3
Total	≈ 16.6



Second Part

TRANSPORT INFRASTRUCTURE STRATEGIES AND ACTION PLAN 2017-2021

Content

- Transport infrastructures patrimony
- Infrastructure strategies
- METLW strategic axis 2017-2021
- METLW action plan 2017-2021
- Conclusion

TRANSPORT INFRASTRUCTURES PATRIMONY

Patrimony/Roads and Road Transport



Highways : 1 770 Km



National Roads : 15 782 Km

Regional roads: 11 157 Km

Provincial roads: 30 395 Km

Structures : 9 400 units

including 1066 Km expressways



13 440 km of rural roads carried out and 15 028 Km launched during the period 2005-2016

Patrimony/Roads and Road Transport

Road Transport Presentation



Road transport transports 90% of persons and 75% of freight transport

The sector accounts for 6% of GDP and employs 10% of the urban labor force



Liberalization of the road freight transport sector

Adoption of a new Road Code

The adoption of a strategic vision for the reform of the passenger road transport sector and its upgrading

Patrimony/Ports and Maritime Transport



40 ports including 13 commercial, fishing and royal marine, 10 regional fisheries, 10 for local fishing, 7 marinas.

2 ports under construction, namely the new port of Safi and Nador West MED Port



Coastal linear of approximately 3500 km on the Atlantic and Mediterranean coast



Appropriate legislative framework (Law 15-02) consistent with agreements and partnerships that Morocco has signed and encouraging private sector initiatives

Patrimony/Ports and Maritime Transport

Maritime Transport Presentation



Morocco occupies a distinguished geographical position, as it is considered one of the most important and densest corridors in the world

Maritime transport in Morocco, which accounts for more than 95% of Morocco's trade with the outside world

Morocco is among the most connected countries, according to the United Nations



Gradual liberalization of regular lines

Reform and rationalization of maritime passenger transport

Liberalization of charter activity

Opening of Moroccan seafarers on the international scene

Patrimony/Railways and Rail Transport



In Africa, Morocco ranks first in terms of rail infrastructure quality

Morocco has a railway network with a length of 2 109 km of which 1 287 km electrified

The Moroccan railway network has 656 structures (bridges, ...)



In 2016 :

The number of passengers transported by train is 39,5 million passengers

Railway assured the transport of 9,3 million tonnes of general cargo and 19 million tonnes of phosphates



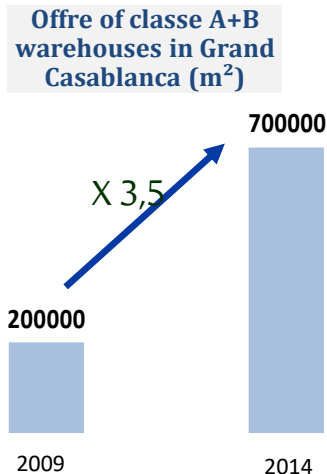
Adoption of a new law No. 52.03 on the organization, management and exploitation of the national rail network

Patrimony/Logistics

First logistic zones in Casablanca and Tangier carried out by public operators:

- Zenata zone (1st phase) in Casablanca developed by the SNTL
- Mita zone (1st phase) in Casablanca developed by the ONCF
- Medhub in Tangier developed by the TMSA

Several logistic zones developed by private operators



World class logistic infrastructures with real assets

International Standards for the
Implementation of Logistic Zones

Efficient connectivity to transport
infrastructures

Integrated services for users

Mobilization of land by the government

- ❑ 82% of required lands are identified
- ❑ More than 1.000 ha already mobilized for logistics zones of Casablanca
- ❑ Nearly 1.700 ha identified in these regions: Tangier, Agadir, Fez, Meknes, Marrakech, Rabat, Kenitra, Dakhla

INFRASTRUCTURE STRATEGIES

- **Road Master Plan by 2035**
- **Rail Master Plan by 2040**
- **National Port Strategy by 2030**
- **National Strategy for the Development of Logistics Competitiveness by 2030**
- **National Mobility Master Plan by 2020 and 2035**

Road Master Plan 2035

Objective: To provide the country with a road network for economic emergence and social cohesion

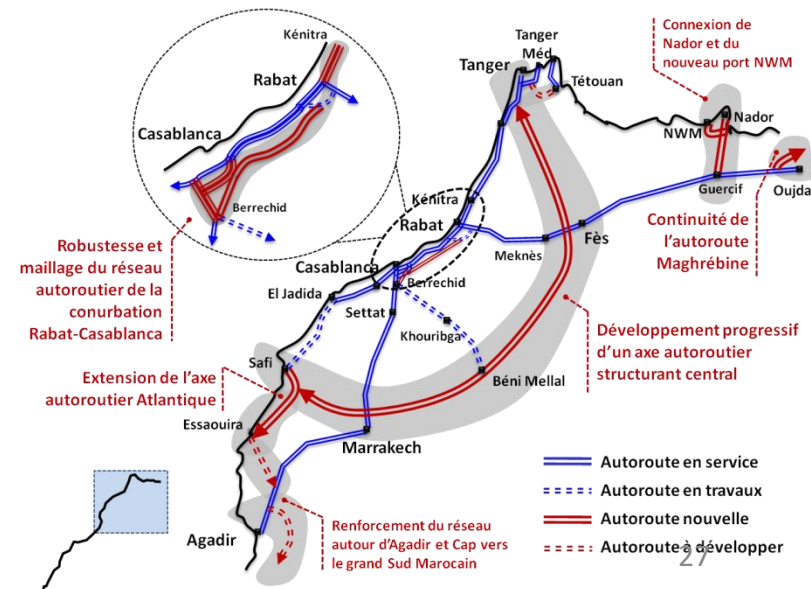
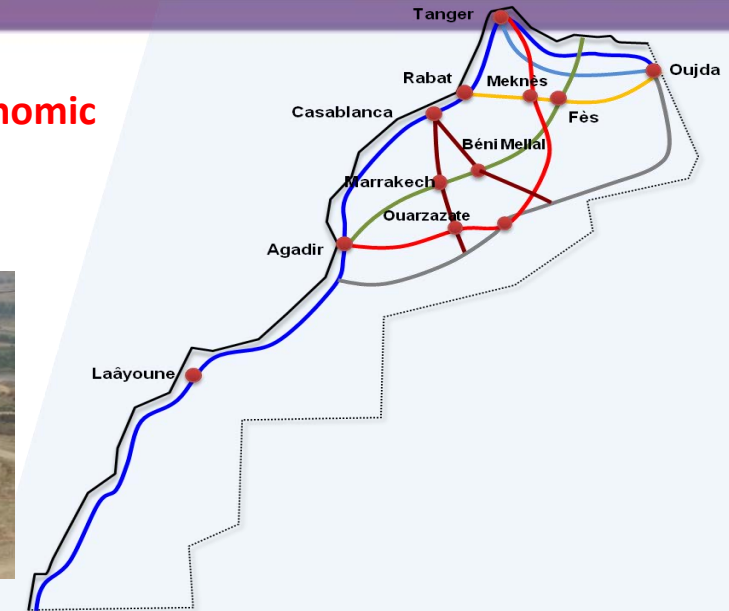
An ambitious program of modernization of the road network:

- 7 000 km of major developments
- 2 100 km of expressway
- 30 interchanges to reduce access time and improve trade security



A motorway network:

- Reach 3 400 km in 2035



Railway Master Plan 2040

Present railway network (2109 Km)

Projects of classic lines (2743 Km)

Projects of high-speed train lines (1500 Km)

Regional rail transport network (Casablanca RER)



Port Strategy to 2030

New ports



ميناء القنيطرة الأطلسي



ميناء الناظور غرب المتوسط



الميناء الجديد بالجرف الأصفر



الميناء الجديد بامسقي



ميناء الداخلة الأطلسي

City ports integration



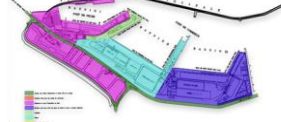
الميناء التهرى للقنيطرة



ميناء طنجة المدينة



ميناء الدار البيضاء



ميناء أنصفي

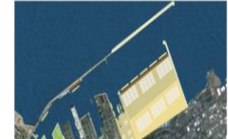


ميناء الحسيمة

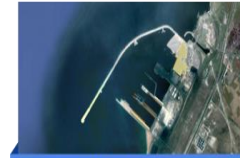
Big extensions



ميناء المحمدية



ميناء الدار البيضاء



الميناء الجرف الأصفر



ميناء أكادير

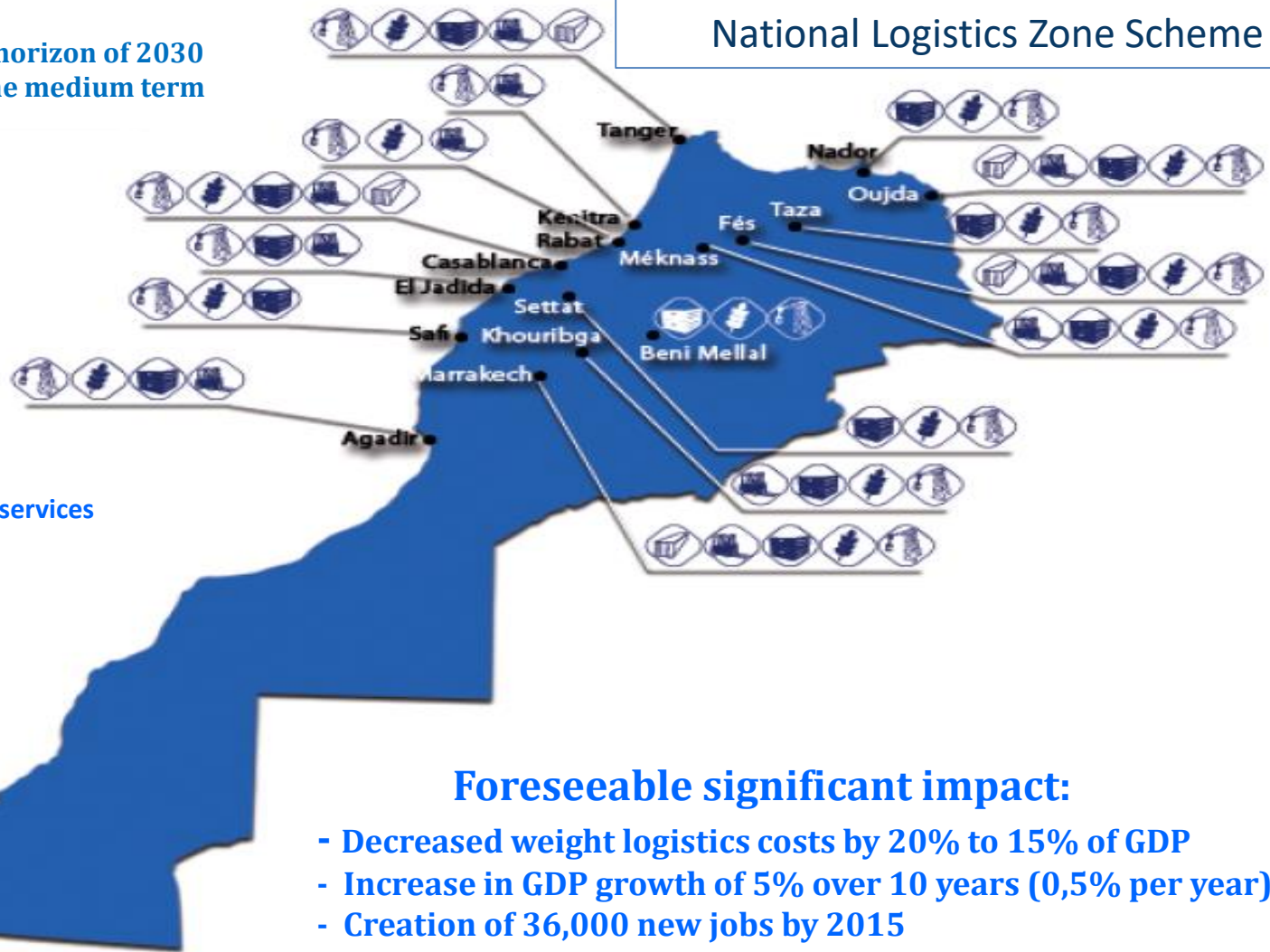


Logistics Strategy to 2030 (Continued)

Land requirements:

Total : 3.300 ha at the horizon of 2030
including 2.080 ha in the medium term

National Logistics Zone Scheme



Five types of logistics areas:

- containers
- Distribution and logistics services
- Agri-marketing
- Cereals
- Building materials

Foreseeable significant impact:

- Decreased weight logistics costs by 20% to 15% of GDP
- Increase in GDP growth of 5% over 10 years (0,5% per year)
- Creation of 36,000 new jobs by 2015
- Reducing the negative externalities associated with flow of goods: lower CO2 emissions and congestion intra and per-urban-

National Mobility Master Plan 2020-2035

Objectives:

- To extract visibility on prospects and projected issues, to be considered in terms of mobility of goods and people
- To optimize the existing transport system (all modes)
- To improve the performance of the transport system in serving the territories
- To improve the energy performance of the transport system
- To reduce the environmental impact of transport infrastructure



METLW STRATEGIC AXIS 2017-2021

Reminder of Gouvernemental Program's axis

Axis I

- Supporting the democratic choice, the principles of the rule of law and the consecration of advanced regionalization

Axis II

- Reinforcing the values of integrity, reform of the administration and consecration of good governance

Axis III

- Development of the economic model, promotion of employment and sustainable development

Axis IV

- Enhancing human development and social and spatial cohesion

Axis V

- Reinforcing Morocco's international radiance for its just causes in the world

Strategic Axis 2017-2021

Infrastructures and Transport corridors serving economic emergence and social cohesion

Continuing deployment of efforts aiming development of infrastructures and transport corridors that structure the territory and Which strongly support economic development and the rapprochement of regions

Multi-modality for better efficiency and competitiveness of transport services and logistics

Ensure the complementarity of transports modes and the promotion of multimodal transport in order to improving efficiency and developing competitive and integrated logistics services

Quality, safety, sustainability and resilience of infrastructures, transport services and logistics

Establishment of safe, high-quality transport systems and ensuring the effective maintenance of the national transport network to insure its preservation and improvement of the level of services

Regional and Continental radiance in the sectors of Infrastructure, Transport, Logistics and Water

Continuing the policy of opening up to Africa and reinforcing relations with continental institutions

Strategic axis 2017-2021 (continued)



METLW ACTION PLAN 2017-2021

METLW Action Plan 2017-2021



Action Plan 2017-2021/Roads and Road Transport

❑ Highway Projects at the horizon of 2025

502 Km for an investment of 23.5 billion dirhams

❑ Expressways Projects at the horizon of 2021

Completion of 333 km

Realization of 187 km in addition to the expressway Tiznit Laayoune with a length of 555 km

❑ Rural Roads Projects at the horizon of 2022

23 000 Km for an investment of 28 billion dirhams

Action Plan 2017-2021/Roads and Road Transport

Road freight transport

- Renewal of the road freight transport fleet
- Strengthening the restructuring of the road freight transport sector
- Upgrading of road freight transport operators
- Support for the development of leading national companies in international road transport (IRT)

Road transport of passengers

- Professionalization of the road passenger transport sector and improvement of its profitability
- Establishment of transparent mechanisms and rules for access to the sector and for control ensuring fair competition and good functioning of the system
- Opening of the sector and promotion of investment and the professions of passengers road transport;
- Development of regional and provincial transportation, as well as rural transportation
- Renewal of the road passenger transport fleet
- Upgrading of road passenger transport operators

Action Plan 2017-2021/Road safety

- ❑ Creation of the road safety national agency : the adoption of the law is in progress ;
- ❑ 20% Reduction of number of traffic fatalities on the horizon 2020



Action Plan 2017-2021/Railways and Rail Transport

- Activation of the doubling of the track : Settat - Marrakech (175 km)
- Realization of studies for the extension of the railway network to the province of the south at a cost of 900 million dirhams.
- Start of construction of the high-speed rail line : Casablanca – Marrakech.
- Construction of new railway stations integrating fully with the services of the high-speed line between Casablanca and Tangier.
- Modernization of existing railway stations.
- Realization of the rail connection to the new port of Safi.
- Realization of the rail connection to the Peugeot-Citroën project in Kenitra.
- Development of rail logistics areas.
- Improving rail safety

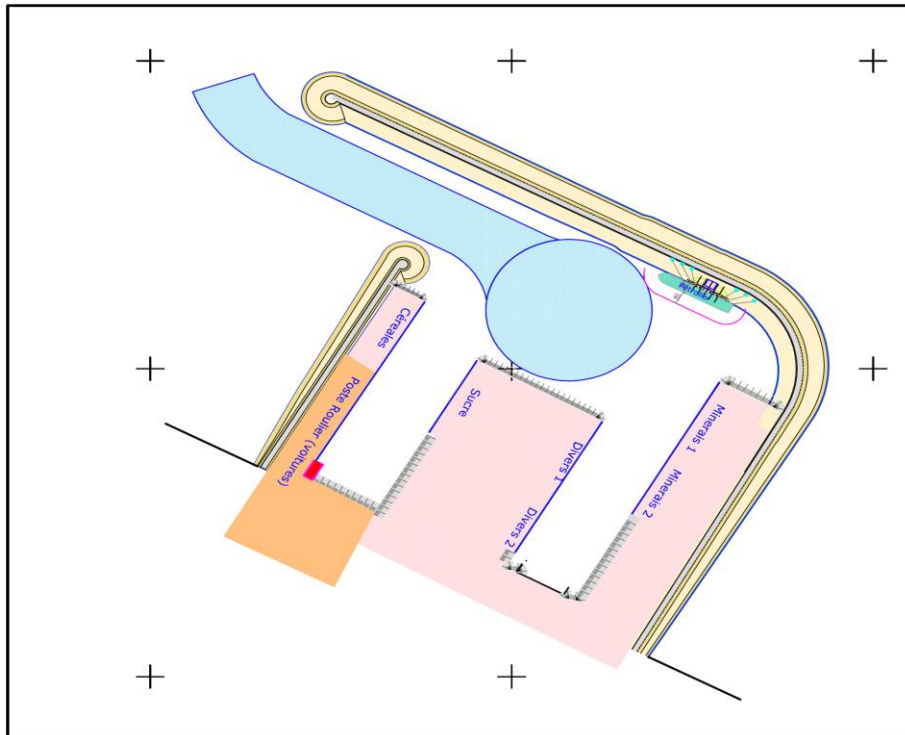
Action Plan 2017-2021/Ports and Maritime Transport

- ☐ Continuing the implementation of ports strategy,
- ☐ Development and upgrading ports,
- ☐ Completion of works concerning:
 - The new port of Safi
 - The port of Nador West Med
- ☐ Launching works concerning:
 - Kenitra Atlantic port;
 - Dakhla Atlantic port;
 - Energetic port of Jorf Lasfar

Action Plan 2017-2021/Ports and Maritime Transport

Kenitra Atlantic Port (9 billion dirhams)

Masterplan



Bulk carrier and conventional polyvalent port

- The first phase consists of the construction of the protective dikes, an automotive traffic dock and a cereal dock.
- The second phase consists of the construction of bulk carrier docks in addition to a hydrocarbon terminal;
- The project also concerns the construction of the Ouled Taleb logistics area (83 ha).

Action Plan 2017-2021/Ports and Maritime Transport

Dakhla Atlantic Port (7,6 billion dirhams)



Fishing port and logistics area for the southern region

- Deep sea port outside the bay, which will be able to satisfy future traffic in fisheries products and the exploitation of small pelagics in stock C and will serve as a logistical and economic tool to facilitate the economic and social structuring Of the South Kingdom.
- Logistics area of about 250 to 300 ha.

Action Plan 2017-2021/Ports and Maritime Transport

New energy port Jorf Lasfar (8 billion dirhams)



Bulk carrier And conventional polyvalent port

- **Consistency:** terminal LNG (Liquefied Natural Gas) and terminal hydrocarbon
- **Objective :** to meet national LNG needs (5 billion m3 in the first phase and 8 billion m3 at the end of the project) and in terms of crude oil and hydrocarbons (capacity 20 billion tons).

Maritime Transport

- ☐ The implementation of a strategic plan for the development of the Moroccan Pavilion
- ☐ Continued efforts to modernize procedures and improve services to sector partners
- ☐ Improving the quality of the services of the Vessel Traffic Monitoring Center in Tangier
- ☐ Improving training conditions at Superior Institute of Maritime Studies (ISEM)

Action Plan 2017-2021/Logistic Sector

- ☐ Continuing the implementation of the national strategy for the development of logistic competitiveness ;
- ☐ Valorizing the exploitation of 600 hectares of existing logistic platforms ;
- ☐ Development of 300 hectares entended for logistics platforms in medium term ;
- ☐ Adoption of a legal system for the development and integration of provided logistic services;

Thank You For Your Attention