

Tangier Tetouan Region

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Generalities

I. Geographical Position

Situated at the north-west point of the Kingdom of Morocco, the region of Tangier-Tetouan, known also as the 'Tingitania Peninsula', is lapped by the waves of the Atlantic to the west, the Mediterranean to the east, and the Straits of Gibraltar to the north, and forms the most northern part of Africa, and the closest point to Europe.

Stretching over an area of 11570 km², the region is composed of four environmental units, the Tangier zone, the coast and the Mediterranean basins, the Jbala zone, and the Bas Loukkos zone.

The straits region is next to one of the busiest sea lanes in the world at the entrance of the Mediterranean and is considered as a gateway of preference between Europe and Africa, reinforced by:

- The numerous ferry links with the north bank of the strait;
- The Morocco-Spain electricity link;
- The Maghreb-Europe gas pipeline;
- The underwater communication cables;
- The fixed link project across the Straits of Gibraltar;

Area: 11,570 km²;

Number of Prefectures/Provinces: 2 Prefectures: Tanger-Assilah and M'diq-Fnideq; and four provinces;

Number of Communes: 100 (13 urban and 87 rural);

Population: 2,470,372, constituting 8.3% of the total population of Morocco;

Density: 213 inhabitants per km² (five times more than the national average, 40 inhabitants per km² ;

Rainfall: about 700 mm per year;

Coastline: 375 km overlooking the Atlantic Ocean and the Mediterranean.

II. The Demographic Aspect

The population of the Tangier-Tetouan Region is currently about 2,470,372, about 8.3% of the national population, with a density of about 213 inhabitants per km² (five times higher than that of the kingdom, 40 inhabitants per km² . (2004 census)

The region has the third highest rate of population growth in Morocco, with an annual rate of growth of about 2%.

The Tangier-Tetouan region has an urbanization rate of 58.4% and has a markedly young population (40% are below 15 years of age).

Division of the Population according to Province (2004)

PROVINCE/ PREFECTURE	Moroccans	Foreigners	Total	Households	Growth (%)
CHEFCHAOUEN	524,539	63	524,602	86,028	1.79
FAHS-ANJRA	97,277	18	97,295	18,689	2.72
LARACHE	472,217	169	472,386	89,944	0.91
TANGER-ASSILAH	759,494	3,089	762,583	162,713	2.57
TETOUAN	612,831	675	613,506	126,461	2.09
REGION TANGER-TETOUAN	2,466,358	4,014	2,470,372	483,835	2.00
TOTAL for MOROCCO	29,840,273	51,435	29,891,708	5,665,264	1.38

III. Potential

By virtue of its geographical situation, the Tangier-Tetouan region has some significant advantages:

- A coastline suitable for seaside tourism;
- A rural hinterland of great ecological value;
- Rich human resources, having 2,470,000 inhabitants;
- Industrial development;
- Fishing in the five ports of the region;
- Continually improving communication networks;
- A preferential fiscal regime;
- A significant historical and cultural heritage.

Communication Infrastructure

The Tangier-Tetouan region is involved in the new dynamic of economic and social development occurring in the north of the Kingdom. The geostrategic situation makes the region a centre of development with national and international influence. This being the case, the authorities are seeking to organize the spatial infrastructure in accordance with a strategy aimed at promoting and gaining the maximum advantage from the potential of the region in the areas of tourism, industry and agriculture.



The transport network

Here it is appropriate to present the components of the region's infrastructure:

I. The Road Network

There are 2027 km of roads, giving an undeniable boost to inter-regional communication:

An ambitious programme of motorway and highway construction is under way:

- The Tangier-Casablanca Motorway - completed;
- The Mediterranean highway, linking Tangier to Sa'ïdia;
 - The Tangier-Ksar Sghir section is already in service with the road being widened by seven metres and a third lane being planned over a length of 6.5 km;

- The Ksar Sghir-Fnideq section;
- An expressway linking Tangier to Tetouan;
- A motorway linking Tetouan to Fnideq (38 km).

In addition, in the context of the Tangier-Med project, new connecting roads are under construction:

- The Gzenaya-Oued R'mel motorway (the principal road serving the future Tangier-Med port);
- A motorway link of 61km linking the Autoroute du Nord motorway (Rabat-Tangier) to the future Tangier-Med port;
- An expressway between the Tangier-Med port and the Fnideq commercial zone;
- A rail link of 45 km joining the future port to the national rail network.

II. The Railway System

- The transport of rail passengers remains the principle activity of Tangier Station, with 642,150 travellers per year;
- A line from Tangier to the future Tangier-Med port is in the process of construction;
- At a cost of 1 billion MAD, the improvement of the railway between Casablanca and Tangier will reduce the distance between the two cities by nearly fifty kilometres and the time by nearly 1h30mn.

III. Airports

The region has two international airports:

- Tangier-Ibn Battouta: Designed to receive 850,000 passengers per year, Tangier's Ibn Battouta Airport manages 7,422 flights per year and receives 222,136 passengers and services a total of 496 tons of freight; (figures for 2003)
- Tetouan - Saniat R'mel: Tetouan's Sania R'mel Airport manages 110 flights per year for a total of 1,065 passengers per year; (figures for 2003)

IV. Ports

The Tangier-Tetouan region has the highest concentration of ports in the Kingdom. There are several ports on both coasts of Morocco. There is a commercial port in Tangier, and some fishing and pleasure ports at Asilah, Larache, Jebha, M'diq, Restinga Smir and Kabila, as well as the port of Ksar Sghir;

A port of international scale is under construction and will be operational in 2007. Tanger-Med is an integrated infrastructure project strategically situated on the straits of Gibraltar at the crossroads of the most important shipping lanes and at the gateway of Europe. It combines three principal components, the port, the free zones and the transportation infrastructure.

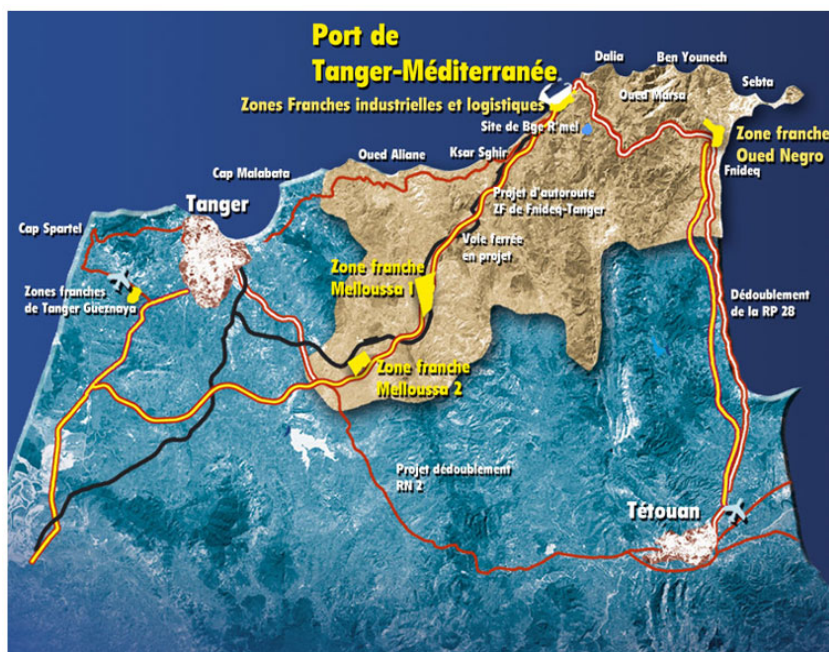
Large-scale Plans for the Region

I. Tanger-Med Port and Associated Infrastructure

Currently, the region has adopted an ambitious approach based on the two areas of Tanger and Tetouan. This project centres on the mega project of the Tanger-Med Port situated 15 km from Europe, which will sustain the regional economy and permit the lasting development of the region.

To attain this objective several projects are under way:

- The construction of the Tanger-Med port flanked by several industrial and free zones
- The construction of road and rail links for the port
- The construction of the section of motorway
- The construction of the Mediterranean Highway
- The development of several sites of tourist interest situated on the coast



port

Infrastructure linked to the

TANGIER-MED PORT

The Tanger-Mediterranean Port is located in a strategic position on the Straits of Gibraltar at the intersection of the busiest sea lanes in the world (35 km east of Tanger and 15 km from Europe), and flanked by touristic, industrial, commercial, logistical and free zones.

The project, which is in effect a large integrated port complex, will keep abreast of the growth in commerce between the market of the European Union, which is about to become the largest world market, and Morocco.

At the same time, the business of the transshipment of containers in the Mediterranean Basin and West Africa is growing rapidly, at an average annual rate of 9% for the next few years.

The Tanger-Med port will make it possible to capture a part of the container transshipment traffic, to develop TIR traffic, to rationalize the allocation of the cereals traffic, to service the need of

the Tangier hinterland for refined petroleum products and to decongest the city of Tangier so that it can concentrate more on tourism and become a focus of culture.

The port will also alleviate the pressure and the congestion experienced by the present port of Tangier, which is destined to become one of the most attractive pleasure ports of the Mediterranean. A significant inflow of yachtsmen, private yachts and cruise liners is expected.



TANGIER-MED Port

The port and the logistical zone are expected to come into service in the second half of 2007. It will consist of **a deep water port of 400 hectares** at Ksar Al Majaz (the rural commune where the port is situated), developing the trade in containers, TIR, cereals, and general merchandise.

Associated Infrastructure

Two industrial free zones situated at Melloussa (an adjacent rural commune), about thirty kilometres from the site of the port, with an area of more than 600 hectares, which will be an extension of the Free Zone of Tangier, and will make it possible to serve operators attracted by the conversion cost advantages, which are considered to be competitive, and the multimodal platform;

A commercial free zone with an area of 205 hectares at Fnideq (the emerging centre of the M'diq-Fnideq prefecture), dedicated to the following activities:

- Business to business. It should include the setting up of:
 - Wholesale business enterprises;
 - Commercial centres with a range of products to offer to transit passengers;
 - Service enterprises.
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Connection infrastructure consisting of:

- A motorway link, with a length of 50 kilometres, joining the Autoroute du Nord motorway (Rabat-Tangier) to the port complex;

- A motorway linking up with the Fnideq commercial zone, and which will also join up with the Tetouan-Fnideq motorway, is also under construction;
- A rail connection with Tangier, 52 km in length, as well as the transformation into expressway of the road joining Tangier and Tetouan.

Other large-scale projects are also to be launched, relating to rural electricity, drinking water, the construction of rural roads, and the construction of a dam in the proximity of the new port destined to provide drinking water.

This infrastructure should also give a major boost to investments and to exports, generate new opportunities for employment and encourage the emergence of new high-added-value economic activities in the commercial, industrial and service sectors.

Thanks to this concomitant infrastructures, it will make the link between the present centres of development in the cities of Tangier and Tetouan.

Thus the port seeks to be a veritable motor for the development not only of the region but also for the whole country. The port, which is situated half-way between the prefectures of Tangier and Tetouan will benefit from the development of this whole region as its characteristics will be better adapted to the needs of enterprise.

The number of jobs generated will be 6,000 when it comes into service and nearly 12,000 when it reaches its cruising speed: 20,000 jobs directly linked to the port and 100,000 in the free zones.

In addition, it should permit the creation of more than 25,000 jobs in residential hotel units.

These projects will offer numerous opportunities to Moroccan enterprises both as subcontractors and also in the service sector in conjunction with the activities that will be developed in the free zones.

In fact, while the free zones are bound to attract international businesses, it is no less the case that Moroccan businesses can profit greatly from this blessing.

The Key Sectors of the Regional Economy

I. Industry

The region constitutes an important national centre of industry. It occupies second place in terms of manpower and businesses (with 15% and 10% respectively, and third place in terms of national added value, production and exports (with 10%, nearly 8% and 14% respectively).

The industrial fabric is relatively diversified.

- This sector generates 6% of national turnover and houses 11% of the national total of industrial establishments guaranteeing about 63,000 permanent jobs;
- Industrial production represents 6% of national production and its share of exports has been estimated at about 11%;
- In terms of exports, the most active sector is the textile and leather sector (52.6% of the exports of the region) followed by the agriculture and food industry (nearly 20%);
- The most important industrial zones of the region are those of the city of Tangier. While the Mghogha and the Port zones are at full capacity, the TFZ de Gzenaya and Al Majd zones will be able to house more than 600 enterprises by 2012, double the existing number of businesses;
- In 1962 Tangier was granted a free zone exempted from customs duties and tax. This zone occupies an area of 54,670 m² of covered space, and currently houses 68 industrial units generating more than 3,500 jobs;
- Extending over 345 hectares, the free zone of Tangier, managed by the TFZ Company, functions as a unique gateway. It meets international norms regarding the quality of fittings and services, and the security of goods and persons. TFZ enjoys some significant fiscal advantages;
- Situated at 15 km from Tangier, the Gzenaya Zone is spread over 130 hectares, of which 85 hectares were developed and equipped between 2000 and 2003, and 45 hectares were in the process of being developed in 2004-2005. Thus, 1229 lots were made available for shop front industry, large industries, small industries and housing. In addition, 22 promotional factories are being constructed, destined for letting;
- The industrial zone on the road to Tetouan, called Mghogha, contains 127 lots with an area of 138 hectares. Nearly 45% of the installed units operate in the field of ready-made clothes, textiles, and leather.

II. Tourism

The historical, geographical and cultural characteristics of the region are one of the principle sources of its richness, occupying a geostrategic position between the Mediterranean Sea and the Atlantic Ocean (375 km of coastline), with a north coast 14 km from Spain.

The region offers a mine of opportunities to ensure the prosperity of the tourist sector:

- Proximity of customers,
- The diversity and rich potential of its history, culture and countryside;
- Its position as a transit passageway for Moroccans resident abroad;
- The presence of large multinationals (business tourism);
- A rural hinterland of great ecological value (eco-tourism);
- A continual improvement of the regional tourist product;
 - Projects to plan and equip high quality beaches: Cap Spartel, Ghandouri, Tinjis, Houara, etc.;
 - The enhancement of the local heritage, the refurbishing of the old Medina (renovation of the old buildings);
 - The provision of Renovotel funds dedicated to the renovation of existing hotel units;

- The Conversion of the Port of Tangier into a pleasure and cruise port;
- The liberalization of the air transport;

The region has 12% of national hotel establishments and 18% of the country's beds. In addition to residential complexes, it also has 295 hotels, 77 of which are classified;

Since 2003, the Tangier-Tetouan region has seen a real craze for its tourist destinations, and a constant increase in arrivals and overnight stops. In 2005, Tangier realized a 10% increase in overnight stops in comparison with 2004.

This dynamism finds concrete expression in the construction of several zones of touristic interest: in particular, the zones of Ghandouri, the Lake, the Diplomatic Forest etc.

By 2012, the Tangier-Tetouan region aims for a fourfold expansion of its sleeping capacity, which currently stands at 13,000 beds.

New plans for tourism

A new vision for tourism is taking place through the concerted efforts of the public sector and the professionals in the tourist sector. Through these efforts, a sort of white paper has emerged, which fixes a certain number of objectives to achieve as well as the reforms that need to be implemented to realize them. Thus, Vision 2010 has set the objective of having 10 million visitors by 2010.

Seaside tourism is seen as of primary importance for the realization of these objectives. To improve it, Vision 2010 is counting on planning and fitting out six new seaside resorts, franchised to private developers, with the responsibility of realizing and promoting the resorts in the context of a checklist of responsibilities agreed beforehand.

It is from this perspective that the creation of the seaside tourist resort of Lixus must be seen. Situated in the Province of Larache, the resort occupies an area of 462 hectares and envisages a capacity in its final stage of 12,000 beds, divided between 7,500 hotel beds and 4,500 residential beds. All the off-site infrastructure is to be provided at the state's expense: water purification, water, electricity, telephone. An attractive preferential framework is in place to bring in investors.

In parallel with this activity, the accent is being placed on the refurbishment of urban complexes so that they might make a greater contribution to the definition of regional tourism and the consolidation of old tourist sites (the Bay of Tangier, the M'diq-Fnideq coast). To this end, nearly 60 hectares, in the Ghandouri sector to the east of the Bay of Tangier, have been taken over by the Caisse de Dépôt et de Gestion to develop as an integrated resort with a capacity of more than 3,000 beds.

Large Scale Tourist Projects

The Tangier City Centre Accommodation Complex

Tangier City Centre is a hotel, apartment block and commercial complex of high standard covering an area of 3.4 hectares of land right in the centre of town near the site proposed to house Expo 2012. This project consists of:

- The development of the wide avenue situated opposite the railway station into a pedestrian precinct;
- The construction of two 4 or 5 star hotels;
- The construction of residential and business high rise apartment blocks.

The aim is to provide the city with a business centre of high quality.

It will be a new city centre, which will permit in particular the extension of the corniche. In addition to accommodation and business, the site should contain nearly 1,100 hotel beds.

The area constructed on will cover 180,000 m², with some apartment blocks of as much as 25 floors.

The Lixus Tourist Seaside Resort

Situated near the town of Larache, the Lixus seaside resort will base its appeal on its beaches, but also on sport (golf, windsurfing, etc.) and culture.

The Lixus resort will extend over 462 hectares and will have 12,000 beds on completion, of which 7,500 will be hotel beds and 4,500 residential ones.

The first hotel will be operational for the season of summer 2007.

The project study provides for the creation on completion of 800 direct jobs and 19,000 indirect ones.

The Jbel Bouhachem Nature Park

With an area of 76,150 hectares, the Jbel Bouhachem Nature Park, which embraces six rural communes, is known as one of the sites of greatest biological and ecological interest in Morocco.

This territory has been chosen because of its fragility and its significant cultural and natural heritage. Bouhachem aspires to be a model of how to integrate the sustainable development of natural resources with the development of the territory of North Africa. The territory is in large part mountainous with its highest point being the peak of Jbel Bouhachem at 1,658 metres above sea level. The high rainfall and the numerous rivers support luxurious vegetation that covers 40% of the area. The working population is almost exclusively concentrated in agriculture. Traditional and food-producing, the main livelihoods are the cultivation of cereals and trees and the rearing of sheep and goats. Nevertheless, the region suffers from isolation, accentuated during the rainy season, and latent under-investment.

However, during recent years, concerted effort has been made by the public authorities to attenuate the effects of this. So 21% of hamlets have thus far been given access to water, and nearly 20% are supplied with electricity.

The development and enhancement of the park is based on the consensus of the participants, region, communes and others, who have adopted a charter that will govern the running of the park. The approach taken by the council appears to be focused on developing the territory by combining socio-economic development and preservation of resources and the natural and cultural heritage. This approach is based on the integration of the activities of protection, enhancement and development, and aims to bring coherence to the actions of the different ministerial departments.

In addition, this approach is undergirded by bettering social conditions and the life context of the population. Numerous actions can be taken to counter isolation (opening roads, constructing bridges), to improve facilities (harnessing springs, improving watering places, purifying the water ...) and to rehabilitate built-up areas and heritage buildings. For the Regional Council, it is not only a matter of protecting the flora and fauna, but also of safeguarding, and of course improving, the way of life and the environment of the population. The Bouhachem Park Project is being financed within the framework of the partnership with the French region of Provence-Alpes-Côtes d'Azur (PACA).

Ghandouri

The site extends over an area of 54 hectares situated on the seafront on the Ksar Seghir road. It has some interesting possibilities by virtue of its uneven topography which provides a panoramic view of the bay. The development of this zone is seen in terms of a combination of culture and seaside with the aim of promoting diversified tourism:

- Cultural and countryside walks
- A history museum
- Handicraft and commercial activities
- A panoramic view and an amphitheatre
- Residential hotel units with a capacity of 4,500 beds.

The Houara Project

The Houara project is an integrated tourism complex stretching over an area of 230 hectares. Apart from touristic residences (750 apartments), hotels (1,300 beds) and villas, the site should house a conference centre, a golf club and other attractive tourist facilities.

III. Habitat

The population of the Tangier-Tetouan Region is currently about 2,470,372, about 8.3% of the national population, with a density of about 213 inhabitants per km², five times higher than that of the kingdom, which is 40 inhabitants per km².

In third place in Morocco in terms of population growth, with an annual rate of about 2%, Tangier-Tetouan is experiencing a massive influx of population because of the many building sites, (the Tangier-Med project, new industrial zones, etc.) which are expected to create more than 100,000 new jobs.

As a result of this, several projects have been initiated to create new urban centres in order to keep pace with this process and respond to a growing need for housing.

Large Scale Habitat Projects

While remaining within the framework of the general guidelines given by the government of the Kingdom of Morocco and taking as a starting point the regional context, and the large-scale projects in process of realization, in particular the Tangier-Med port complex and the collection of infrastructures that accompany it, some investigations have been undertaken, supported by a ground investigation, to evaluate the merits of possible sites for the creation of new urban centres.

The parameters for the identification of sites are based on the following two points:

- The search for rational integration within the regional urban framework, favouring the mechanisms of complementarity;
- The rational, optimum division of functions and roles in the light of the different constraints (natural and man-made), and the actual and potential roles of each site.

On this basis, three sites have been identified:

- **The Gzenaya El Jadida urban centre, situated in the rural commune of Boukhalef;**
- **The Ksar Sghir-Ksar Majaz urban centre;**
- **The Melloussa-Jouamaâ urban centre.**

The following table presents in brief the programme and the data concerning the three sites identified:

Urban centre	Location	Area	Criteria for choice	State of development
Gzenaya Al Jadida	Near Boukhalef, ten kilometres south-west of the city of Tangier	1070 hectares	Near the urban perimeter of Tangier and one of the areas for the natural extension of the city; The existence of two industrial zones that are already operational;	An orientation scheme has been drawn up; The first nucleus is in the process of development consisting of an development zone initiated by the Al Omrane Group, covering an area of 120 hectares; A development plan is being drawn up
Ksar Sghir - Ksar Majaz	30 km from the city of Tangier and 6 km from Tangier-Med Port	1500 hectares	Within immediate proximity of TMP The site has the potential to play a role as the main town of the province of Fahs Anjra; The existence of infrastructure, physical and natural potential; To strengthen the existing urban framework.	An ideas competition for the creation of the new town was launched on March 15th 2005, and submissions were examined on May 25th 2005; A development plan is being drawn up
Melloussa	Near Melloussa and Jouamaa 15 km south-east of the city of Tangier and 30 km from PTM	2000 hectares	SDAUD sees it as an urban centre to be created It will pair with the two free zones of 600 hectares situated at Melloussa I and II; Significant land potential (public land)	Land enquiry has been developed; Zone has been the subject of an orientation study as a transitional phase in the elaboration of a refurbishment plan; Development plan in the process of being launched;

The Ibn Battouta Project

Bounded on the north by the access road to the Sidi Kacem shrine, to the south by the Diplomatic Forest, to the east by the RN1 and to the west by the Atlantic Ocean, the Ibn Battouta project is situated about 20 km from Tangier city centre, near the Tangier free zone and the Gzenaya industrial zone, whose expansion it will have to keep abreast of.

The project stretches over more than 120 hectares and requires an estimated investment of 344,200,000 MAD.

The Irfane Project

Covering an area of approximately 59 hectares, the Al Irfane project expresses the very strong desire to create an urban entity capable of offering its inhabitants all the services of a modern city.