



المركز الجهوي للاستثمار فاس مكناس
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 Centre Régional d'Investissement Fès - Meknès



Royaume du Maroc
 Ministère de l'intérieur



THE REGIONAL INVESTMENT CENTER
**AT THE HEART OF
 FEZ-MEKNES REGION
 DEVELOPMENT**



www.fesmeknesinvest.ma



كَرِهْتَ الْجَلِيلَةَ الْمَلِكَةَ مَتَمَّ السَّلَامُ مِنْ نِكْرِهِ إِلَهُ

INTRODUCING THE REGION FEZ-MEKNES

MACROECONOMIC INDICATORS

Why invest in the Region ?

Key investment sectors

- Industry
- Offshoring
- Agriculture
- Tourisme
- Handicraft





MACROECONOMIC INDICATORS VISION AND AMBITIONS

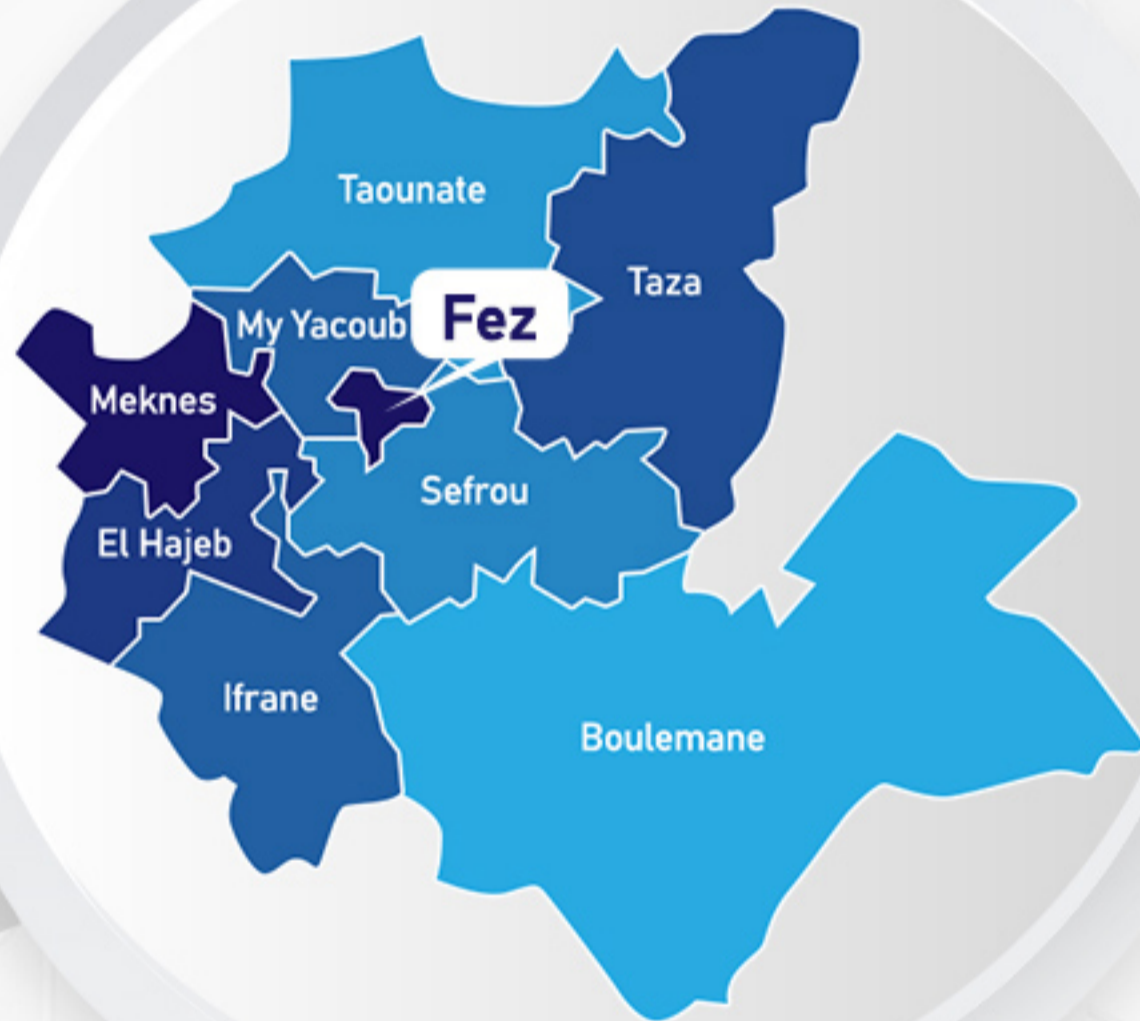
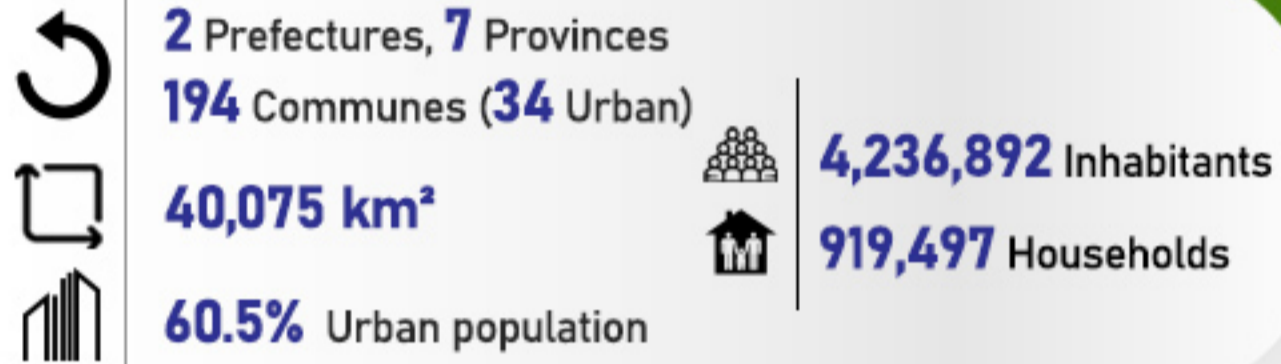
MACROECONOMIC INDICATORS OF THE REGION



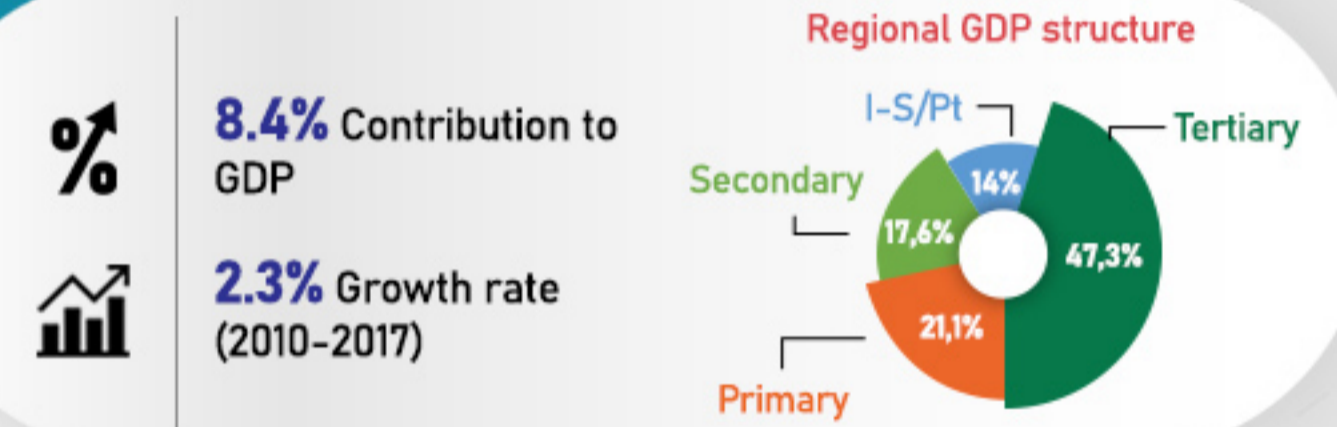
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Fez-Meknes region : an emerging promising hub since the 2015 implementation of the advanced regionalization in 2015

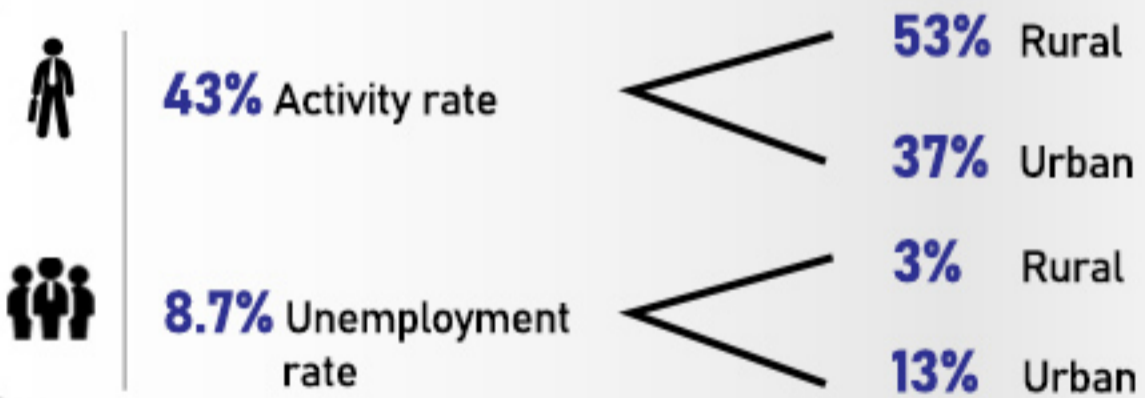
Monograph



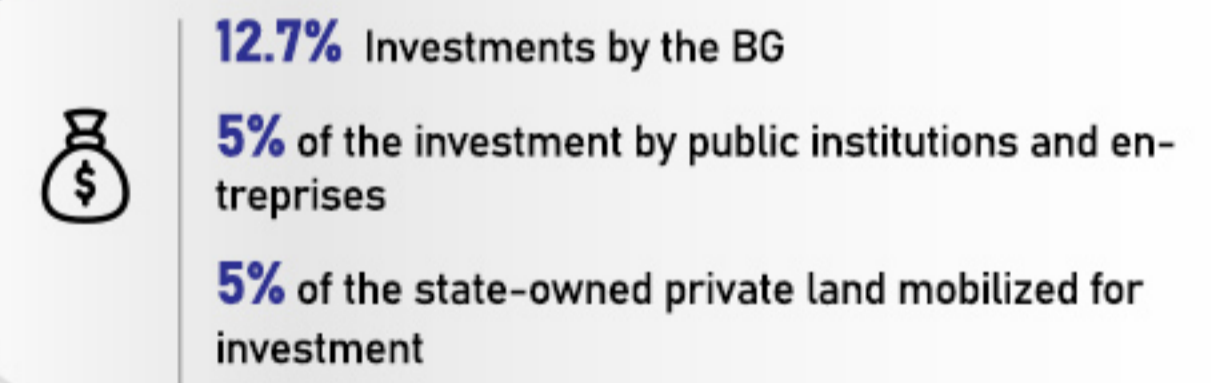
Economy



Employment



Public Investment



1st National university hub

2nd Contribution to national agricultural value added

2nd Destination for land investment in support of the Green Morocco Plan

4th Contribution to national wealth

➤ A regional development vision defined for the medium and long term



AN INTEGRATED DEVELOPMENT APPROACH



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► An approach based on 6 axes :



STRATEGIC ACTIVITY SECTORS



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➤ Ambitions of the region by the year 2042 :

- 

1st multidisciplinary agricultural hub
Focused on both export and local markets.
- 

1st agro-business hub
- 

1st handicraft hub with high value-added
- 

1st knowledge economy hub
- 

2nd IT and outsourcing hub
- 

3rd tourism hub
Enhancing the region's
- 

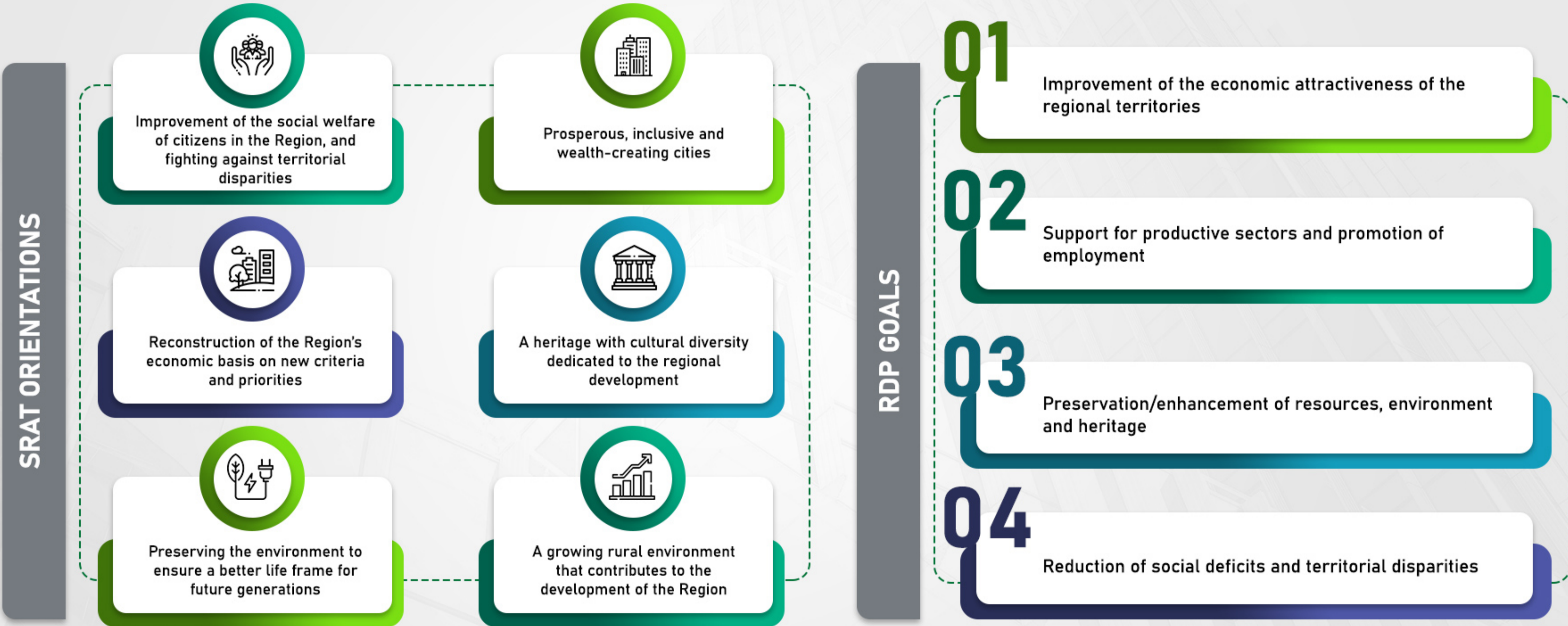
3rd Industrial hub,
particularly in electronics, mechanics, and the pharmaceutical sector.

SRAT | Expected improvement in GDP per capita of the Region





SRAT and RDP goals Convergence





Integrated and complementary programs supporting territorial development and economic boost of the Region



3 programs with three dimensions

Regional development

Rural equipment

Promotion of historical fabric



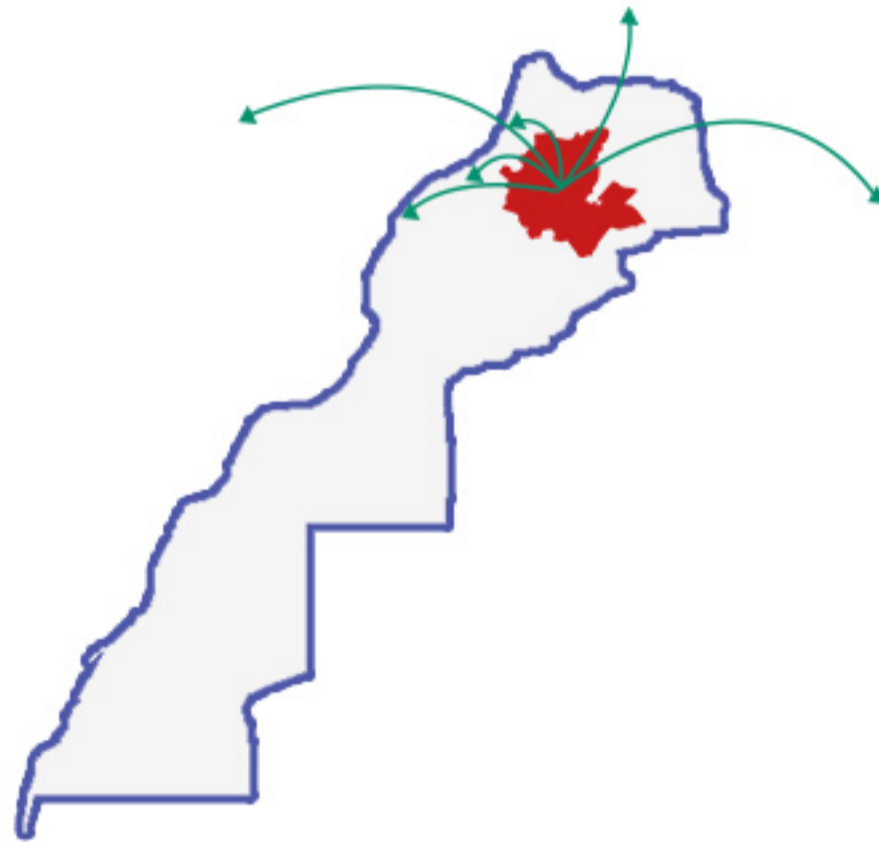
WHY INVEST IN THE REGION?

Developed infrastructure and strategic positioning



Strategic geographic positioning

- A geographical positioning which makes the Region a notorious geostrategic hub in terms of demographic flows and economic trade corridors.



| | | |
|-------------------|---|------------|
| 1h flight | → | Spain |
| 2h flight | → | France |
| 2h highway trip | → | Rabat |
| 2h50 highway trip | → | Casablanca |



Diversified transport infrastructure

- **A road network of 8,689 km**, i.e., 21% of the national network :
 - National road : 1,173 km
 - Regional roads : 1,744 km
 - Provincial network : 5,771 km
- **Highway network** linking the Region to major ports (3h50 to Tangier Med, 2h55 to Casablanca, 1h45 to Kenitra).
- **Railway of 200 km** linking the Region to major cities of the Kingdom.
- **Fes-Sais international airport** with a capacity of 3M passengers/year , thanks to an annual traffic growth of 13%, and to ongoing development of the Region international connectivity to majors world capitals.



Qualified human Capital

- Qualifies human capital in different sectors :
- **6 universities**, allowing the region to rank as the 2nd university hub with 150,000 students of higher public education (2022/2023).
 - **City of Trades and Skills** with a capacity of 3,140 seats for the year 2025.
 - **266 training centers**, with an annual hosting capacity of 25,187 seats (9,222 for technicians and 15,965 for specialized technicians), with 236 Specialties and Trades
 - **Specialized engineering schools** :
 - ENSA Fez, ENSA Meknes
 - Higher School of Automotive and Aeronautical Engineering (ESI2A)
 - INSA Group Engineering School at UEMF University



➤ Rich natural heritage



Rich natural heritage

The Region has many natural heritage sites :

- Lakes and natural mineral springs of the Middle Atlas.
- Thermal stations of Moulay Yacoub, Ain Allah, and Sidi Harazem.
- Ifrane National Park, home to the largest cedar forest in Morocco.
- Tazekka National Park and The Friouato Caves in Taza, designated as cultural heritage by The UNESCO.
- Mountains and snow: Michlifen, Habri, and Hibri in Ifrane, Bouiblanc in Taza.
- Forest and herbaceous cover extend over more than 1.2 M Ha (14% of the national forest area), half of which is located in Boulemane.



Unique cultural heritage

The Region is characterized by its unique cultural heritage :

- Fez is home to the oldest active university in the world (Al Quaraouiyine).
- 6 historic medinas representing a significant built heritage. The Medina of Fez, spread over an area of 280 Ha. It's a UNESCO world heritage site since 1981, considered as one of the oldest medinas in Morocco. It is also one of the largest pedestrian areas in the world, with over 10,000 alleys.
- Presence of a Roman archaeological site (Volubilis) near Meknes and Moulay Idriss Zerhoun.

The Region stands out for its exceptional artistic immaterial capital of a great diversity : The Fez Festival of World Sacred Music, the Cherry Festival, the Poetry Festival, SIAM (International Agricultural Show of Morocco), and National Crafts and Leather Fair



Conducive business climate

- Adoption of measures aiming at propting the business climate : dematerialization of administrative procedures, payment deadlines follow-up committee, etc.
- Setting up of a platform to host productive investment (Logistics & Industrial Zones, Free Zone, Economic Activities Zone, etc.).
- Attractive incentive framework via the adoption of investment support measures, namely the employment bonus and the Industrial Sovereignty Fund.
- Investment dynamics boosted by the establishment of large international groups : Lear Corporation, Alstom, Yazaki, Yura, Aptiv, Webhelp, CGI, Alten, Sitel Group, Triumph International

STRENGTHENING THE COMPETITIVENESS OF THE REGION IN TERMS OF OTHER PRODUCTION FACTORS



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Production factors



Logistics

- 7 multi-flow logistics zones which will be developed with new generation logistics parks, an SME/SMI park, intermediate storage and large plots of land for logistics activities.
- Bonding of the dry port of Bensouda will make exports from the region more fluid.
- A highway connecting Fez to Marakesh* will equally offer an opportunity for commercial exchange development between regions, particularly in terms of tourist flows.



Industrial land

- The region has invested to improve its supply of industrial land through the development of an additional area of 641 ha in industrial zones by the year 2024 (ZAI, PIAC Ain Chegag, ZI Ouislane, Industrial Zone Ain Aicha, Fez Technopark, Industrial Park Fes Sais, Fez International Exhibition Park, , Industrial Zone Ain Bida).
- The region also offers competitive prices in several modes (e.g., rental and transfer). World dimensions industrial ecosystems (Alstom, Lear Corporation, Yazaki, Aptiv, etc).



Energy

- Fez-Meknes region offers production factor costs that are slightly below the national average.

THEY HAVE CHOSEN TO INVEST IN FEZ-MEKNES REGION



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➤ Several major investors have already placed their trust in the region

• APTIV •

ALSTOM

YAZAKI

floquet
monopole

YURA
YURA CORPORATION

LEAR
CORPORATION

LES
DOMAINES
AGRICOLES

Diana Holding

CENTRALE
DANONE

AICHA

Les Mûlleries de Sous Belhassan
HSB

سوف
SIOF

ÉLÉPHANT VERT
UNE AGRICULTURE Saine ET DURABLE

AJP

السعودية المغربية للاستثمار
ASMA INVEST

Webhelp

GROUPE
ACTICALL

CGI

ALLEN

sitel
group

Capgemini

Marriott
HOTELS · RESORTS · SUITES

Royal MIRAGE®

MICHLIFEN
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VICHY THERMALIA
Spa Hôtel

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ACCORHOTELS
Feel Welcome



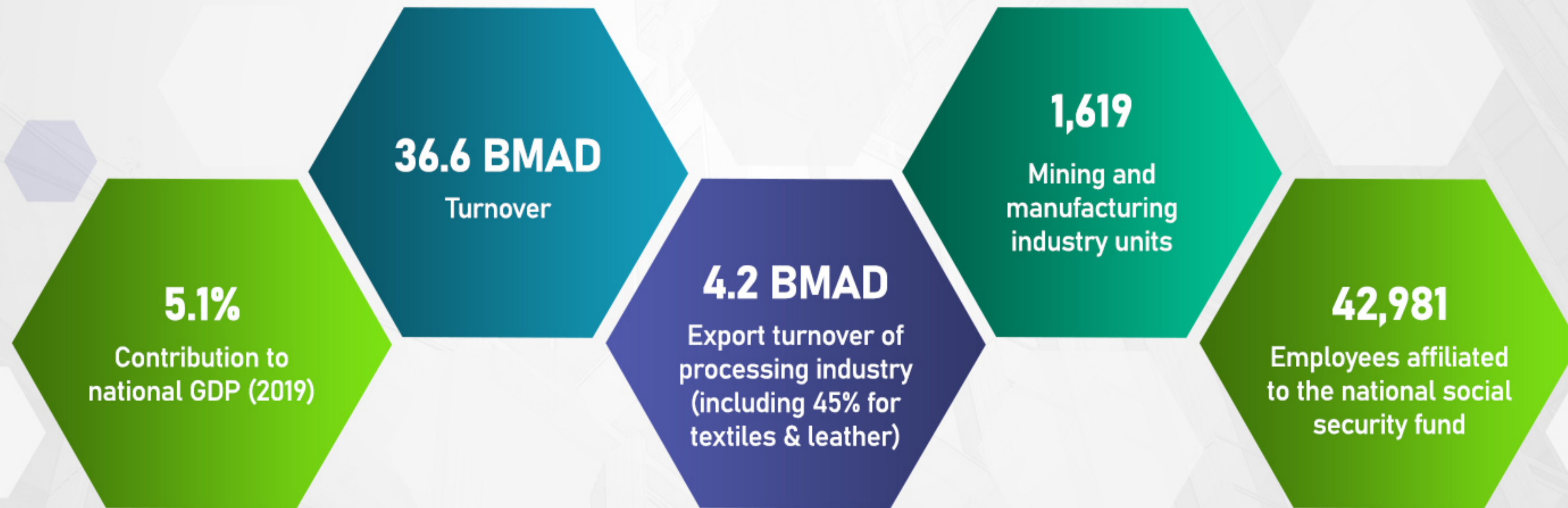
MAJOR SECTORS

INDUSTRY



- The Region is committed to revitalizing its industrial fabric towards new sectors and products with high added value

Sector key indicators (2020)



➤ The Region is committed to revitalizing its industrial fabric towards new sectors and products with high added value

Leading industrial sectors (2018)



- ◆ **Fez-Meknes Bipole hosts 80% of the region industrial fabric**
- ◆ **Industrialization history going back to more than 60 years**

Industrial exports



Regional industrial exports have recorded an average annual growth of 11.2% between 2015 and 2019, to reach an export turnover of around **4.2 BMAD**.

Industrialization background



Fez was ranked 2nd industrial city of Morocco up to the 90s.

Sectors with high added value



The agri-food and leather/textile sectors represent 68.7% of the added value of the Region's industry.

Qualified human resources



Qualified and high-performing human resources supported by industrial vocational training institutions:

- ENSA Fez and ENSA Meknes
- Higher School of Automotive and Aeronautical Engineering ESI2A, where 80% of graduates secured their first permanent contract before completing their end-of-studies internship (2016)
- Engineering school of the INSA group at the Euro-Mediterranean University

Financial Incentives

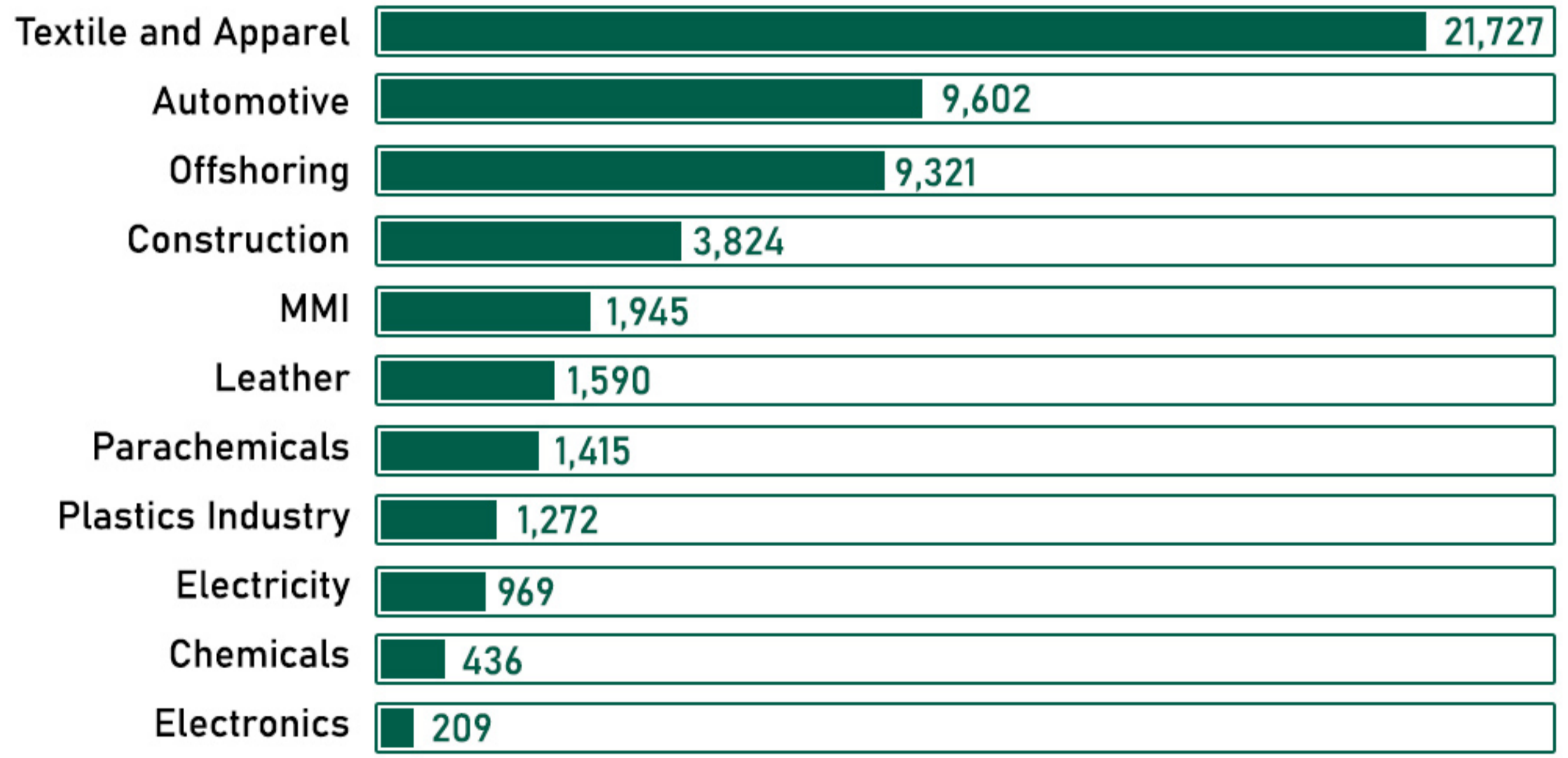


Existence of financial incentives under the Industrial Development Fund, the Regional Fund for supporting industrial investments, and the regional employment bonus system.



- ◆ Jobs creation driven by developing sectors

The textile, agri-food, automotive and offshoring represent 80% of the created jobs in the industrial sector in the Region







HOSTING PLATFORMS SUPPORTING INDUSTRY SECTOR



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➤ The Region has hosting competitive and operational platforms for various purposes






| Projects | Features | Integrated components/services | | | | | | | | |
|---|---|--|-----------------------|---------------------|--------------------|---------------------|------------------|----------------|------------------------------|--|
| MEKNES AGROPOLIS  | <ul style="list-style-type: none"> • Area : 115 ha net area (103 lots) • Jobs : 18,000 • Cost : 559 BMAD • Investment : 4 BMAD | <ul style="list-style-type: none"> • Components : Agropark and food Qualipole, allowing the promotion of key sectors such as olive oil, fruits/vegetables, cereals, milk, and meat. | | | | | | | | |
| FES SHORE  | <ul style="list-style-type: none"> • Area : 20 ha (1st part (13,000 m²) delivered in 2012 and 2nd part (12,000 m²) in 2020) • Jobs : 1,980 • Cost : 1.2 BMAD | <ul style="list-style-type: none"> • Components : A park for offshoring activities designed based on the best world standards, with 'world-class' infrastructure and ready-to-use office spaces. | | | | | | | | |
| INDUSTRIAL ZONES  | <ul style="list-style-type: none"> • 13 Operational industrial districts/zones : <ul style="list-style-type: none"> ▶ 8 Districts and Industrial Zones (IZ) in Fez (418 ha) ▶ 3 Districts and IZ in Meknes (531 ha) ▶ 2 IZ in Sefrou (57.5 ha) ▶ 1 IZ in Taza (31.5 ha) | <ul style="list-style-type: none"> • IZ Ex-COTEF redeveloped over 15 ha in Fez • 3 new zones launched in order to expand the land offer in the Region : <ul style="list-style-type: none"> ▶ Industrial Parc (PIAC), 81 ha ▶ IAZ Sefrou, 380 ha ▶ Ouislane IZ in Meknes, 60 ha. | | | | | | | | |
| LOGISTICS PLATFORMS  | <ul style="list-style-type: none"> • ONCF dry port at the Bensouda logistics zone, over an area of 5.5 ha, acting as a hub for reception, handling, storage, and distribution of containers (import/export). | <ul style="list-style-type: none"> • Development of 7 Logistics Zones over 365 ha : <table border="0"> <tr> <td>1 Ras El Maa (100 ha)</td> <td>5 Agropolis (60 ha)</td> </tr> <tr> <td>2 Ouislane (92 ha)</td> <td>6 Bensouda (100 ha)</td> </tr> <tr> <td>3 Mejjat (20 ha)</td> <td>7 Taza (27 ha)</td> </tr> <tr> <td>4 Kandari Sidi Khair (33 ha)</td> <td></td> </tr> </table> | 1 Ras El Maa (100 ha) | 5 Agropolis (60 ha) | 2 Ouislane (92 ha) | 6 Bensouda (100 ha) | 3 Mejjat (20 ha) | 7 Taza (27 ha) | 4 Kandari Sidi Khair (33 ha) | |
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STRUCTURING PROJECTS SERVING INDUSTRY



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➤ The Region has launched structuring projects aiming at promoting industrial land supply

| Projects | Features | Integrated components/services |
|---|---|---|
| EX-COTEF ZONE  | <ul style="list-style-type: none"> Constructed area : 9.4 ha Total area : 15.2 ha Cost : 571.85 MMAD Project progress : Completed | <ul style="list-style-type: none"> 26 lots, with 23 industrial and 3 equipment Number of planned industrial investment projects : 20 |
| AIN CHEGAG IAZ  | <ul style="list-style-type: none"> Area : 360 ha Cost : 500 MMAD Proposed jobs : 51,000 Estimated turnover : 29 BMAD Project progress : The draft decree relating to the creation of the zone was approved on 09/08/2022 | <ul style="list-style-type: none"> The area has a development potential of 3 platforms and 5 related districts with a total of 236 ha by 2035, divided as follows : Agri-food district with a turnover of 3 BMAD, generating 4,300 jobs Green textile district with a turnover of 2.4 BMAD, generating 16,000 jobs Automotive district with a turnover of 14.5 BMAD, generating 23,000 jobs Railway district with a turnover of 3 BMAD, generating 4,400 jobs Electricity/Electronics district with a turnover of 5 BMAD, generating 3,500 jobs |
| AIN CHEGAG INDUSTRIAL PARK  | <ul style="list-style-type: none"> Area : 81 ha (238 lots), of which 50 ha are dedicated for the Leather District and 31 ha for a general industrial zone Available plots : 124 Cost : 303 MMAD Situation : Development operations in progress | <ul style="list-style-type: none"> Leather District General Industrial Zone Wastewater Treatment Plant |
| AIND BIDA INDUSTRIAL ZONE  | <ul style="list-style-type: none"> Area : 80 ha Cost : 300 MMAD Nature : General zone, part of it for oil mills Jobs : 5,000 | <ul style="list-style-type: none"> General Industrial Zone : 30 ha Wholesale trade and economic activity zones : 20 ha Zones intended for the relocation of oil mills within the framework of the Sebou depollution program : 20 ha Areas for the transfer of gas storage facilities : 10 ha |
| FES SAIS ECOPARK  | <ul style="list-style-type: none"> Area : 20 ha (118 industrial lots for rent) Cost : 113.4 MMAD Mobilization mode 1 : Rental of ready-to-use industrial buildings starting from 30 MAD/m²/month Mobilization mode 2 : Rental of industrial lots | <ul style="list-style-type: none"> Park intended for activities of non-polluting industrial SMEs/SMIs that create added value and jobs 118 industrial plots 9 relay industrial buildings 4 buildings for different services Stormwater infiltration basin Green spaces |

STRUCTURING PROJECTS SERVING INDUSTRY



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▶ The Region has launched structuring projects aiming at promoting Industrial land supply

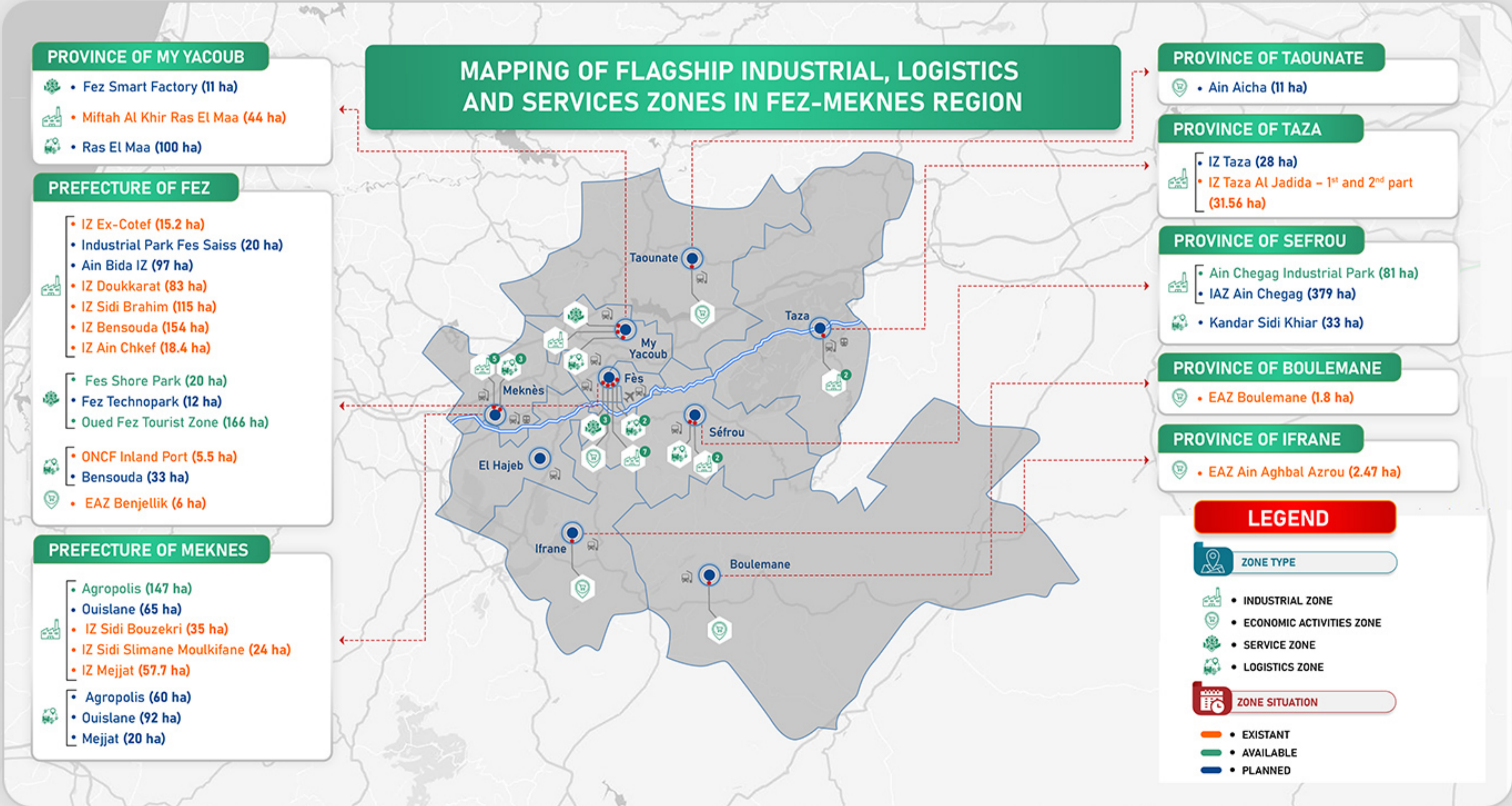
| Projects | Features | Integrated components/services |
|---|--|--|
|  <p>TECHNOPARK</p> | <ul style="list-style-type: none"> • Area : 2 ha • Total area : 12 ha • Cost : 55 MMAD • Situation : Under development | <ul style="list-style-type: none"> • Incubator • Co-working space • Fab lab • Cinema, TV and music production studio • Space for services such as banks, insurance, post,telecoms, etc. • Other spaces for food, sports hall, etc. |
|  <p>INTERNATIONAL EXHIBITION PARK</p> | <ul style="list-style-type: none"> • Area : 4 ha • Cost : 64 MMAD • Situation : In progress | <ul style="list-style-type: none"> • A hall for permanent exhibition and a conference room, with an area of 4,000 m² for each. • A Business Center containing : • Incubation Center: 12 offices of areas between 15 and 38 m² • Accompaniment Center: 11 offices with areas between 16 and 24 m² to house the Services of the CCIS, Maroc PME, OMPIC (The Square of Innovators), ASMEX, etc. • Training and Events Center: 3 training and meeting rooms • Co-working and Networking Space: 400 m² • Technical Center: Technical offices and workshops |
|  <p>FEZ SMART FACTORY</p> | <ul style="list-style-type: none"> • Area : 11 ha • Cost : 104 MMAD • Situation : In progress | <ul style="list-style-type: none"> • 1st Industri 4.0 ecosystem in Morocco • Innovation plots : 93 • The Center for Evaluation, Transfer and Technological Innovation 4.0 (CVTIT) Accelerator • The 4.0 Start-up • R&D Labs • Business Center 4.0 |

HOSTING PLATFORMS SERVING INDUSTRY



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► The Region has hosting competitive and operational platforms for various purposes



OFFSHORING

A group of business professionals are seated around a long, dark conference table in a modern office. Large windows in the background offer a view of a city skyline. The scene is brightly lit, suggesting a high-rise office environment. A green geometric overlay is present on the left side of the image, partially obscuring the scene.

KEY NATIONAL INDICATORS



Evolution of the Number of Jobs in the Sector (National)



Export Turnover (in BMAD, National)



Main companies in the sector established in Morocco

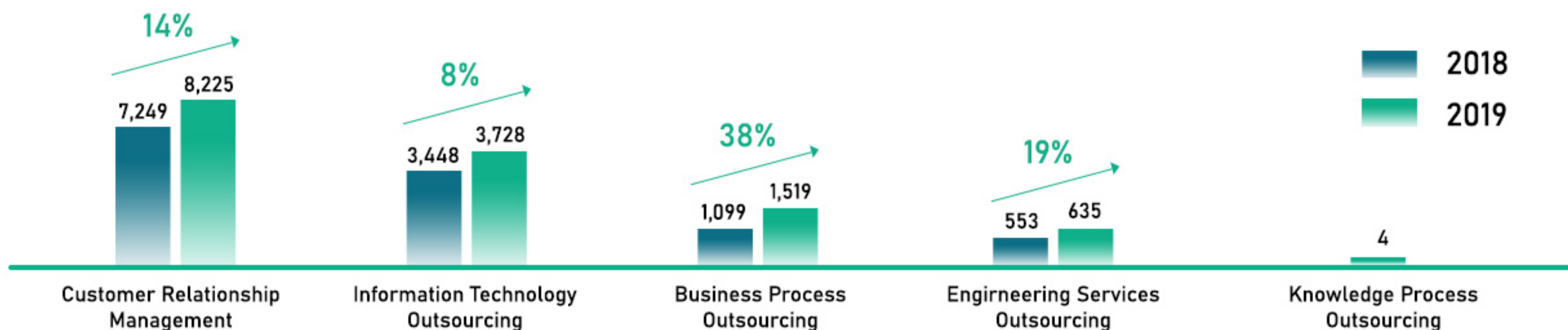




➤ An ecosystem based on 5 priority sectors



Evolution of offshoring revenues in MMAD (2018-2019)



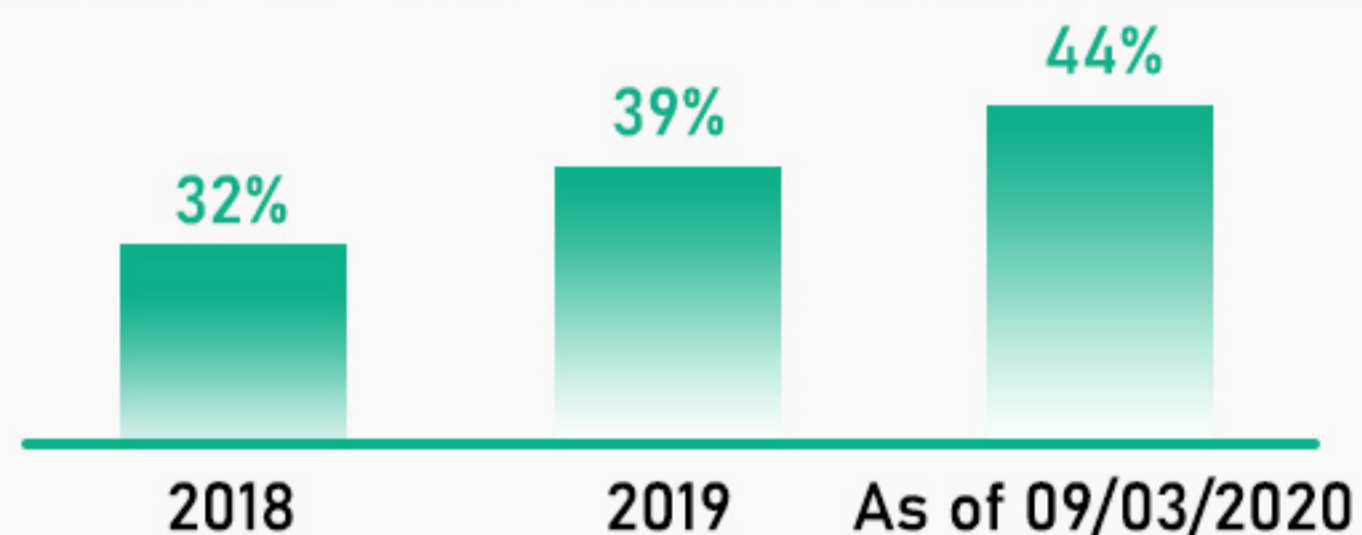


1st Leading employer sector in the Prefecture of Fez (36 call centers employing 4,433 employees in 2019)



66 Call centers and data processing centers in the Region

A share of recruitment in offshoring is increasing (ANAPEC insertions) :

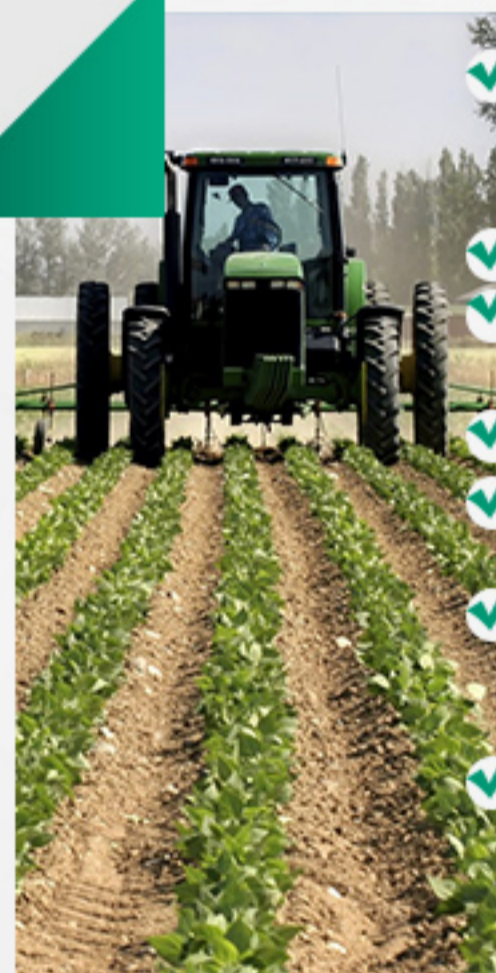


3rd offshoring destination in Morocco after Casablanca-Settat (57%) and Rabat-Salé-Kenitra (24%), the Fez-Meknes region currently represents 11% of the jobs in this sector at the national level.

AGRICULTURE



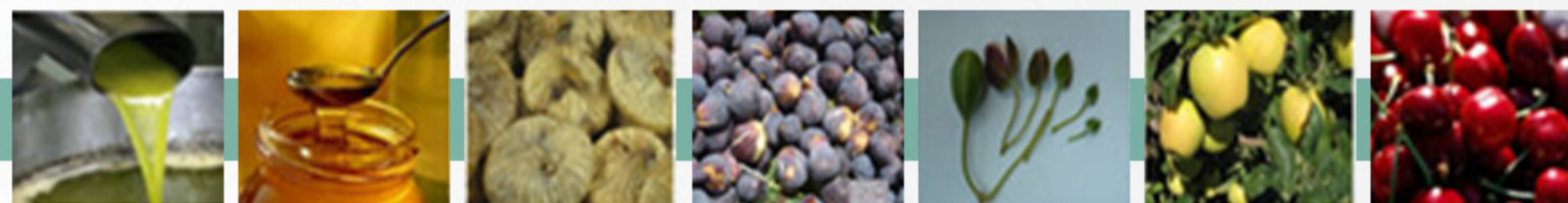
- The Region is the 2nd largest agricultural hub in the Kingdom
- 2nd Region benefiting from land mobilization in support of the Green Morocco Plan



- ✓ **Diversity of sectors** : Cereal crops, market gardening, arboriculture, olive cultivation, viticulture, medicinal and aromatic plants (MAP), cattle and sheep farming, dairy production, forestry
- ✓ Existence of a **competitiveness hub** in the domain of agro-industry (Agropolis).
- ✓ **Launching of major structuring projects** for irrigation water saving in the Saïss plain.
- ✓ **Water resources** (groundwater and surface water).
- ✓ **Qualified and high-performance human resources** supported by agricultural vocational training institutions
- ✓ **High-quality support structures**, through specialized schools and training centers (National School of Agriculture of Meknes), and the promotion of research (AGRINOVA, INRA, universities).
- ✓ **Implementation of financial incentives** within the framework of the Agricultural Development Fund, through the mobilization of an area of more than 24,613 ha for the benefit of 191 projects at attractive rental prices.

Promotion of local products

13 local products likely be labeled



- Dried fig Nabout
- Zerhoune caper
- Ain Leuh cherries
- Aknoul almond
- Outal Lhaj olive oil
- Fez caper
- Lmta olive oil
- Azzaba olive oil
- Zerhoune olive oil
- Agourai anise
- Tafegight apple
- Honey of Sefrou & Boulemane
- Figs Chaari

Key Sector Indicators (2019)

14.6%



Contribution to the national agricultural GDP

26.9 BMAD



Turnover

1.05 BMAD



Investment amounts approved by the Agricultural Development Fund, of which 55% from private sector

13.4%



Utilized Agricultural Area (UAA)

73,905 T



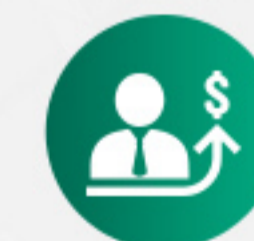
Agricultural exports

53.7 MWD



Jobs

14.6%



CNSS affiliated employees

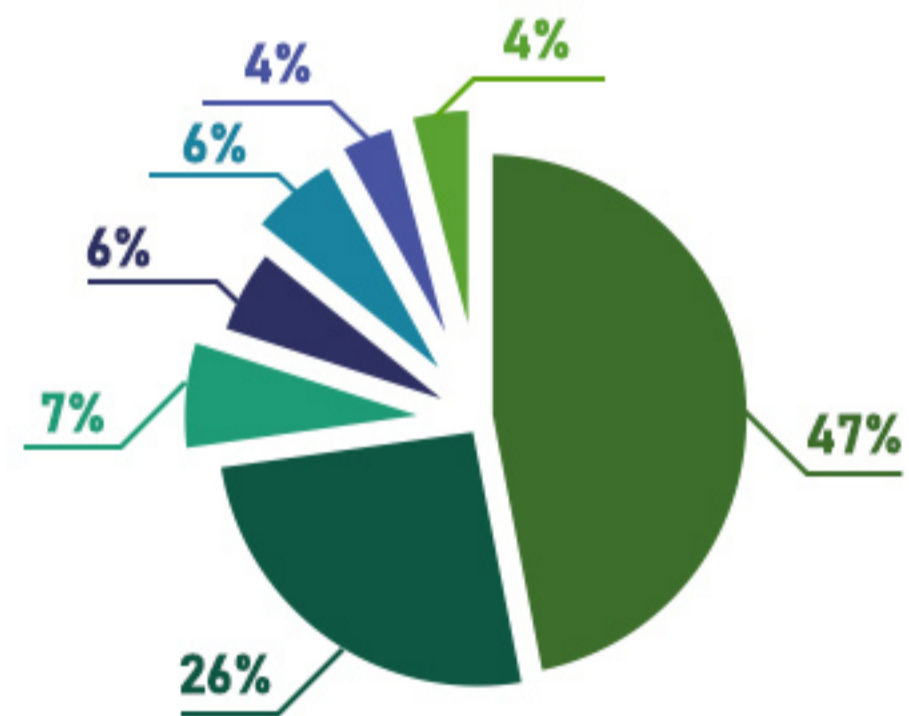


- **Region with strong agri-food assets**
- **The agricultural sector is the leading economic growth engine in the Region**

01



Distribution of UAA per production field (3rd national position)



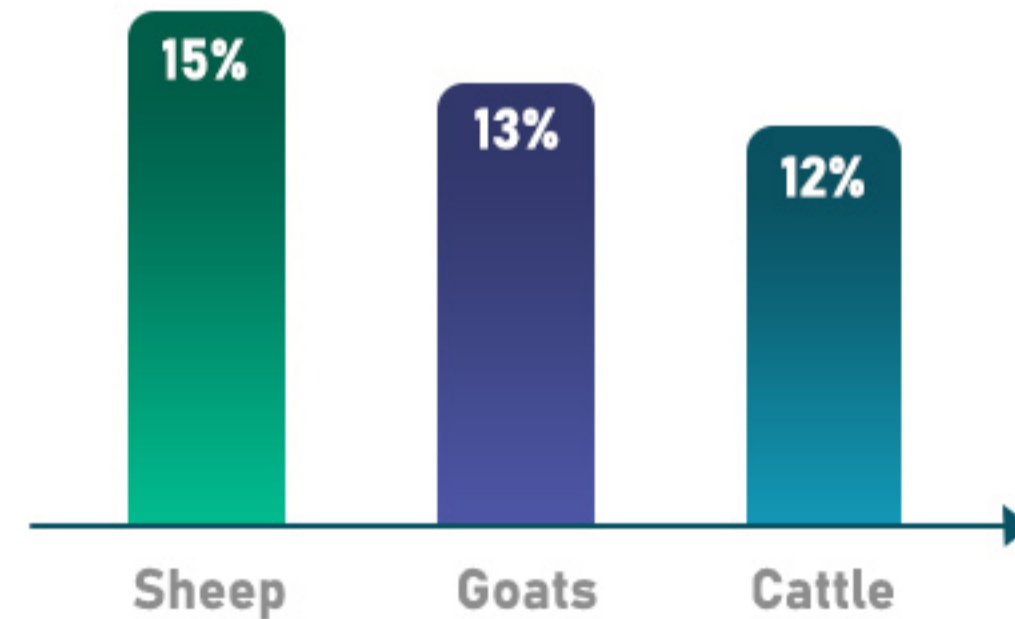
- Cereals
- Fig trees
- Olive trees
- Rosaceae
- Forage crop
- Market gardening
- Legumes

1,235,522 ha of UAA

02



Importance of national livestock in the national fabric

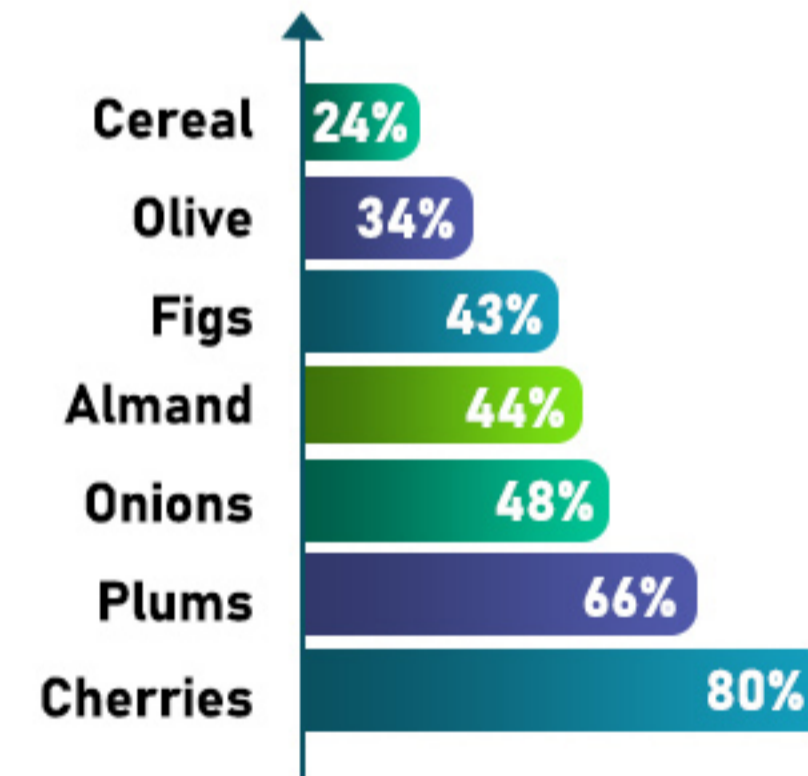


106 units, with a production capacity of 674,067 T/year and 26M eggs/year.

03



National contribution of major plantation activities



735 units, with a production capacity of 6,413,647 T/year



- 1st producer of capers (70% of the national production)
- 1st producer of cherries

04



Main exported agri-products (2018-2019)

| | |
|---------------------------|--|
| Olive oil | Aromatic & medicinal plants |
| Olive pomace oil | Spice & herbalism |
| Other vegetable oil | Fruits & dehydrated dried vegetables |
| Viticulture products | Frozen & deep frozen fruits/vegetables |
| Drinks/Juice, Nectars | Cereals, legumes, various seeds/seedcrop |
| Tinned caper and gherkins | Tinned vegetables and fruits |


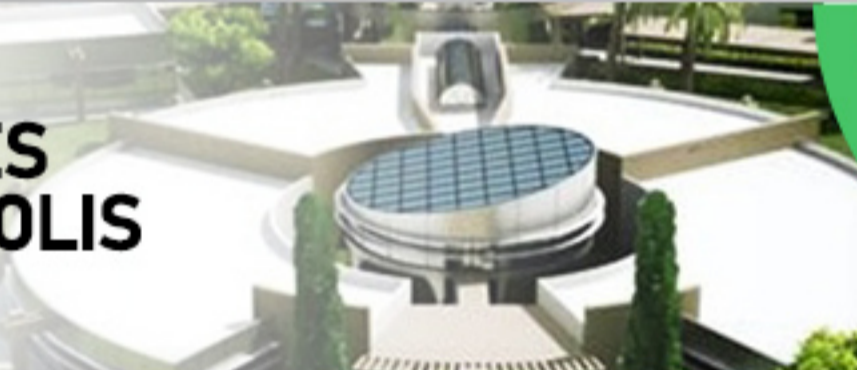


Canned olives



- 1st exporter of viticulture products
- 1st exporter of olive oil and olive pomace oil



➤ Launch of several key projects for the development of the agricultural sector

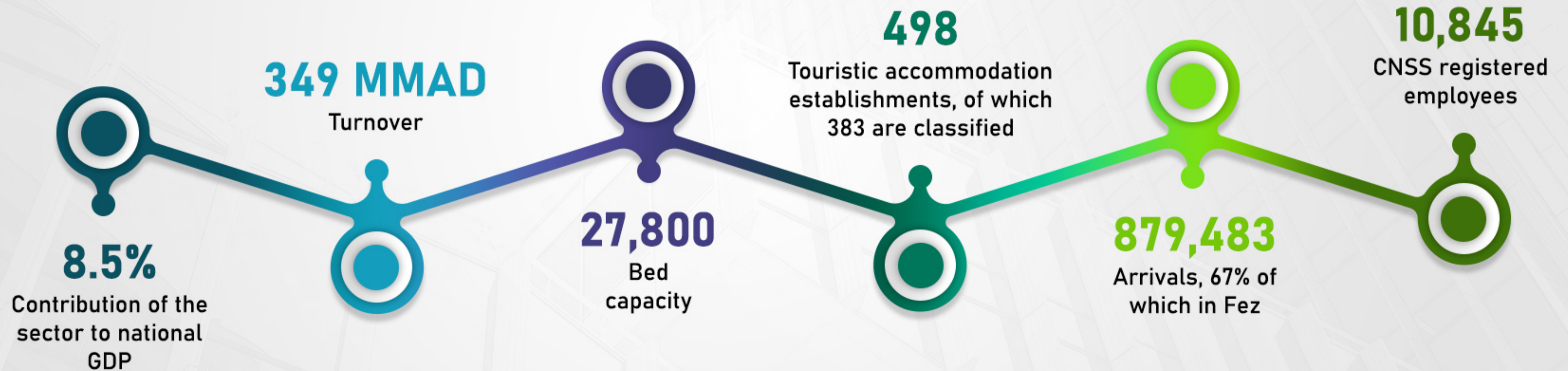
| Projects | Features | Description/ Components |
|---|--|--|
|  <p>SAIS PLAIN SAFEGUARD PROJECT</p> | <ul style="list-style-type: none"> • Location : Fez, Moulay Yacoub, Sefrou, Meknes, El Hajeb and Ifrane. • Area : 30,000 ha • Water resources : 125m³ from Mdez dam • Cost : 5.8 BMAD • Project cycle timeline : 2017-2022 | <ul style="list-style-type: none"> • Situation : Transmission pipeline from the Mdez dam • 3km water supply galleries • 3,200 mm diameter main waterpipe for 60km • 2 water regulation and filtration structures • Irrigation water transport and distribution network |
|  <p>MEKNES AGROPOLIS</p> | <ul style="list-style-type: none"> • Area (first phase) : 30 ha, of which 115 ha net area (225 plots) • Jobs : 18,000 • Cost : 559 MMAD • Transfer price : starting from 300 MAD/m² • Currently being marketed : 101 plots available (65% marketing rate) | <ul style="list-style-type: none"> • Agropark and Qualipole Alimentation • Promotion of key sectors : fruits/vegetables, cereals, milk and meat. |
|  <p>ARITECH POLE</p> | <ul style="list-style-type: none"> • Cost : 16.3 MMAD | <ul style="list-style-type: none"> • Euromed University Regional Innovation Center. • Goals : Supporting the upgrading og the agro-industrial sector, via the support of entrepreneurs, the promotion of research and development and the adaptation of the agricultural structure to international standards. |
|  <p>CREATION OF A MODERN ONION STORAGE AND PACKAGING UNIT</p> | <ul style="list-style-type: none"> • Situation : Agripole Meknes • Cost : 31.6 MMAD • Partners : Regional Counsel | <ul style="list-style-type: none"> • Onion storage unit, with a capacity of 4,000 T, distributed over 8 rooms and a packaging space. |

TOURISM



➤ Tourism, a sector with continuous growth at the regional level

Key Sector Indicators (2019)



- ◆ The Region is the historical heart of the Kingdom with an extensive rich tangible and intangible heritage
- ◆ A diversified tourism product with ongoing developing niches

The Region positions itself as a top golf destination

- Fez Royal Golf : 18 holes
- Oued Fez Golf : 18 holes
- Meknes Royal Golf : 9 holes, playable at night
- Michlifen Golf & Country Club : The first mountain golf course in Africa designed by Jack Nicklaus, awarded Best Golf Hotel in Morocco in 2019 during the prestigious "World Golf Awards."

The Region is developing its tourism infrastructure by creating a touristic zone called "OUED FÈS" to facilitate the establishment of tourist complexes.

The Region constitutes an **artistic center** capable of hosting different national and international events and conferences : 30 annual festivals, (including the Sefrou Cherry Festival, recognized by UNESCO)



The Region is endowed with the diversity and richness of its tourist products :

- **Mountain tourism** in the Province of Ifrane (70% of forest areas)
- **Rural tourism** via tourist circuits through rural areas, particularly in the provinces of Taza and Boulemane
- **Thermal tourism** in the Province of Moulay Yacoub where there are a number of natural hot springs resort (Vichy)
- **Spiritual tourism** through the pilgrimage to the Zaouia Tijanya visited by about 200 million pilgrims from all over the world
- **Cultural tourism** through visiting various historic monuments in Fez, Meknes, Volubilis, etc.

A sector witnessing strong dynamics, in particular due to :

- Growing demand for the cultural product of Fez.
- Promotion of air traffic via opening new international directlines.
- Implementation of various rehabilitation and development programs for old Medinas of Fez and Meknes.

◆ The Region is endowed with several touristic attractiveness factors



Ifrane ranked as the 2nd cleanest city in the world with a UNESCO certified park

- ▶ Ifrane occupies 2nd position in the ranking of the cleanest cities in the world, after Calgary in Canada and ahead of Helsinki in Finland. The ecological capital of Morocco obtained this score thanks to the richness of its ecosystem and the quality of life it offers.
- ▶ Ifrane National Park has the largest cedar grove nationally, labeled 'Biosphere Reserve' by UNESCO in 2016

01



Meknes listed among the top 10 cities to visit in 2019

- ▶ Meknes takes over the 10th position in the annual ranking of the 'Lonely Planet' travel guide, cities to visit in 2019.
- ▶ Meknes is a favorite destination for tourists thanks to the richness of its cultural heritage: mausoleum of Sultan Moulay Ismail, underground attics, Bab El Mansour monumental gate (one of the most beautiful gates in Morocco).
- ▶ 2 sites classified as World Heritage by UNESCO (Meknes and Volubilis).
- ▶ Organization of the Meknes International Agricultural Show welcoming more than 800,000 visitors/year.

02



Specialized training pole

- ▶ The Region has 2 training institutes in hotel and tourism technology, with a capacity of 400 trainees/year.
- ▶ Existence of a specialization course in tourism professions at the Euro-Mediterranean University of Fes (UFMF).
- ▶ Establishment of special training contracts by ANAPEC to promote employment through programs such as TAHFIZ, TAAHIL and IDMAJ .

03



Incentive environment

- ▶ The Region has set up an employment bonus system aiming at encouraging tourism investments.
- ▶ Availability of support and financing solutions intended for upgrading tourist accommodation institutions (RENOVOTEL).
- ▶ The development of the "Oued Fès" tourist activity zone allows for hosting numerous projects, specifically 4 hotel lots with areas ranging between 10,000 and 28,000 m².

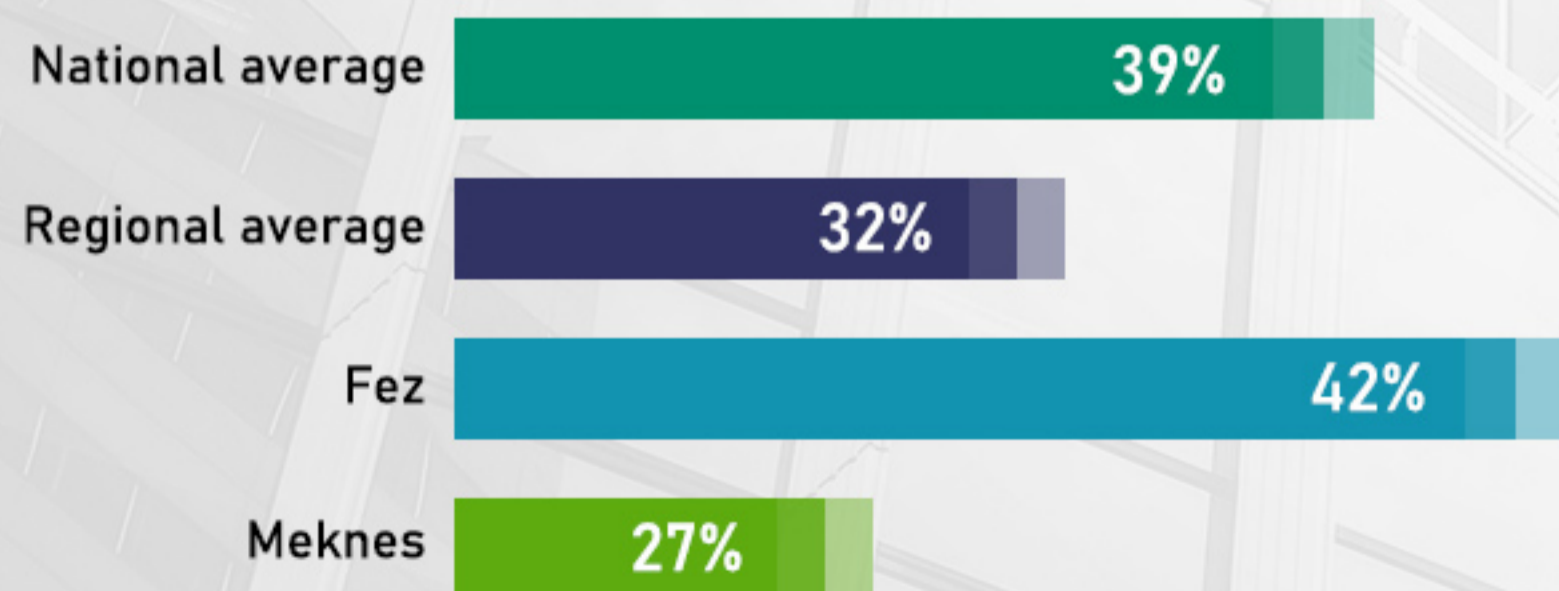
04

➤ A significant development potential in light of the growing demand for the destination

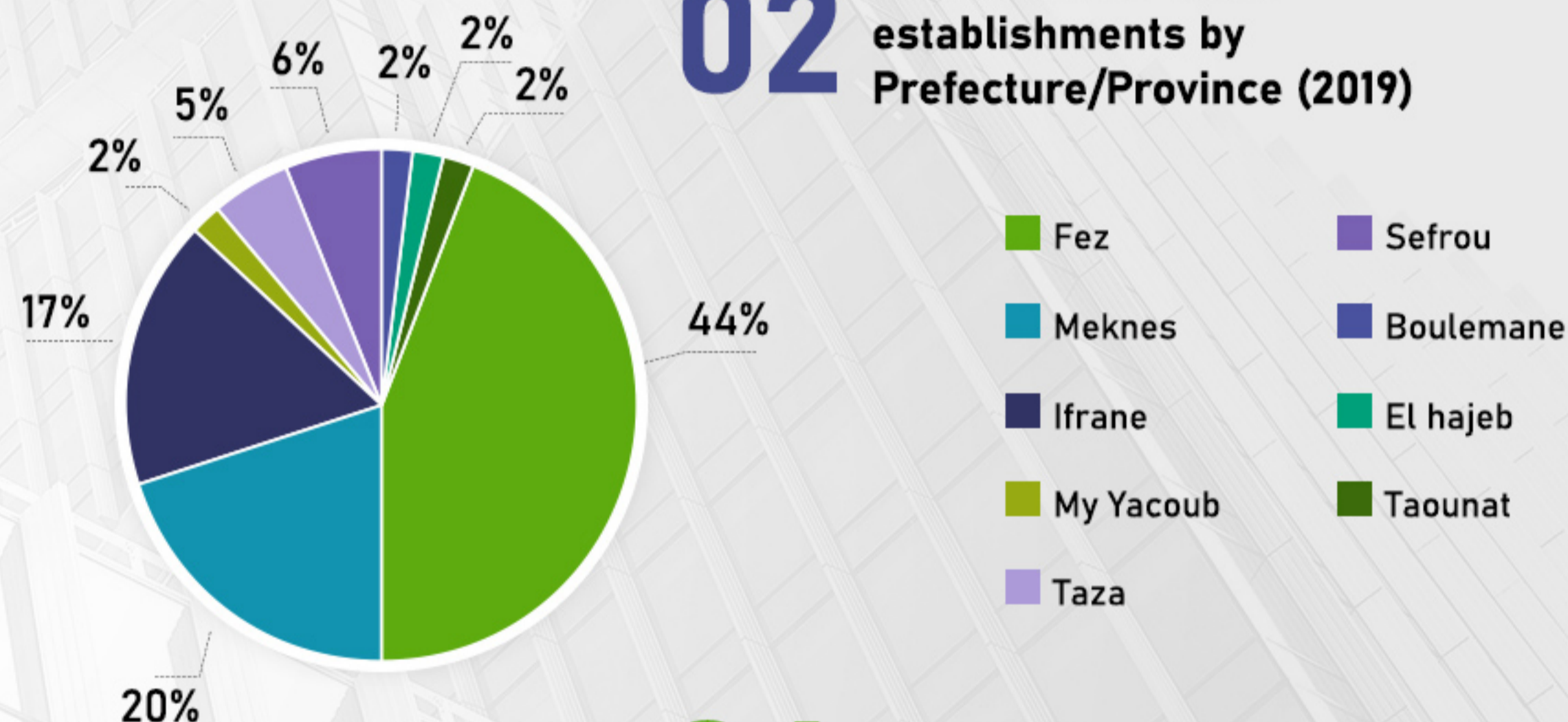
01 Operating units in tourism sector (2019)



03 Occupancy rates in major cities of the Region



02 Breakdown of hotel establishments by Prefecture/Province (2019)



04 The top 5 international arrivals to the Region








| | | |
|--|---------|--------|
| | France | 67,748 |
| | Germany | 53,453 |
| | USA | 46,845 |
| | Spain | 40,081 |
| | China | 38,048 |

STRUCTURING PROJECTS SERVING TOURISM



المركز الجهوي للاستثمار فاس مكناس
 ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠ ٠٤٤٠٠
 Centre Régional d'Investissement Fès - Meknès

- Strong dynamics in terms of tourism investments
- Investment opportunities at different tourism value chain links

| Projects | Features | Components/ Integrated services |
|---|--|--|
|  <p>OUED FEZ TOURIST DEVELOPMENT ZONE</p> | <p>Cost : 860 MMAD Area : 166 ha Jobs : 5 500</p> | <p>The site, where development work has been completed, includes 4 hotel lots, an 18-hole golf course of 60 ha, a conference center, a theater, shops, a market, a school, sports grounds, a mosque, and 28 lots for commerce, leisure, and facilities.</p> |
|  <p>REGIONAL DEVELOPMENT PROGRAM OF CULTURAL AND NATURAL TOURISM</p> | <p>Cost : 17 MMAD Due date : 2022</p> | <p>A program covering :</p> <ul style="list-style-type: none"> • Promotion of rural tourism value chain, • Reinforcement of the attractiveness of urban cultural tourism centers. • Enhancement and exploitation of hinterland wealth. |
|  <p>FEZ CONFERENCE CENTER</p> | <p>Cost : 40 MMAD</p> | <p>With a capacity of 2,000 seats, this project will enable Fez to be among the cities to host business conferences, and will boost business tourism (MICE tourism)</p> |
|  <p>BOULEMANE THERMAL STATION PROJECT</p> | <p>Cost : 40.3 MMAD</p> | <p>Location : Ain Skhouna Tajmout, Rmila Commune, Boulemane Province</p> |
|  <p>DEVELOPMENT OF BOUADEL TOURIST SITE IN TAOUNATE</p> | <p>Cost : 61 MMAD</p> | <p>Agreement signed on July 4, 2019 Position : Taounate Provinc</p> <ul style="list-style-type: none"> • Creation of leisure and relaxation space (3.5 MMAD) • Bouadel promenade development (14 MMAD) • Establishment of a marketplace for local products (5 MMAD) • Development and upgrading of the village (including the construction of 4 tourist lodges) 10 MMAD |

Legend : ■ Completed ■ In progress ■ Planned

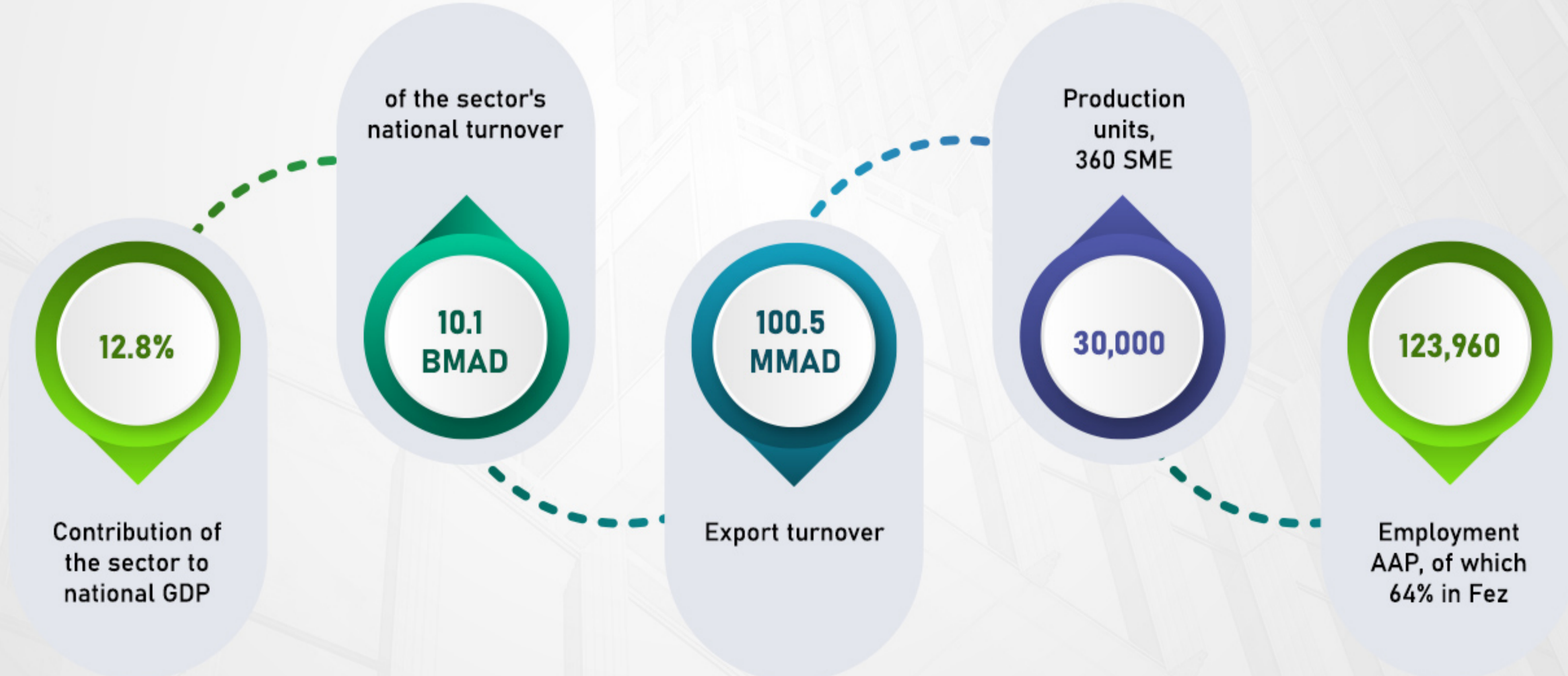
HANDICRAFT

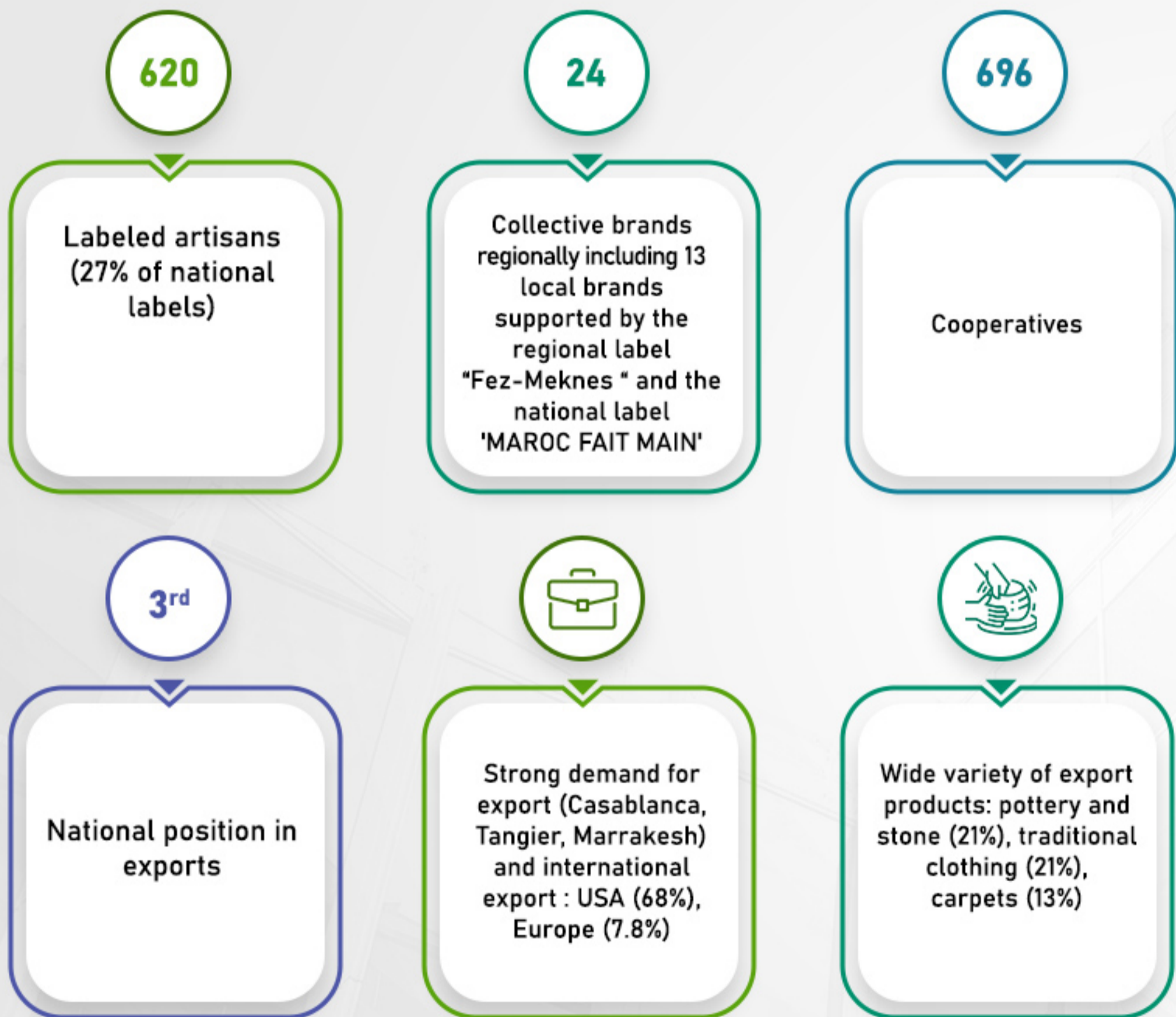




➤ A historical expertise that contributes to making the Region an artistic hub and a center of excellence for the production and commercialization of handicrafts

Key Sector Indicators (2019)

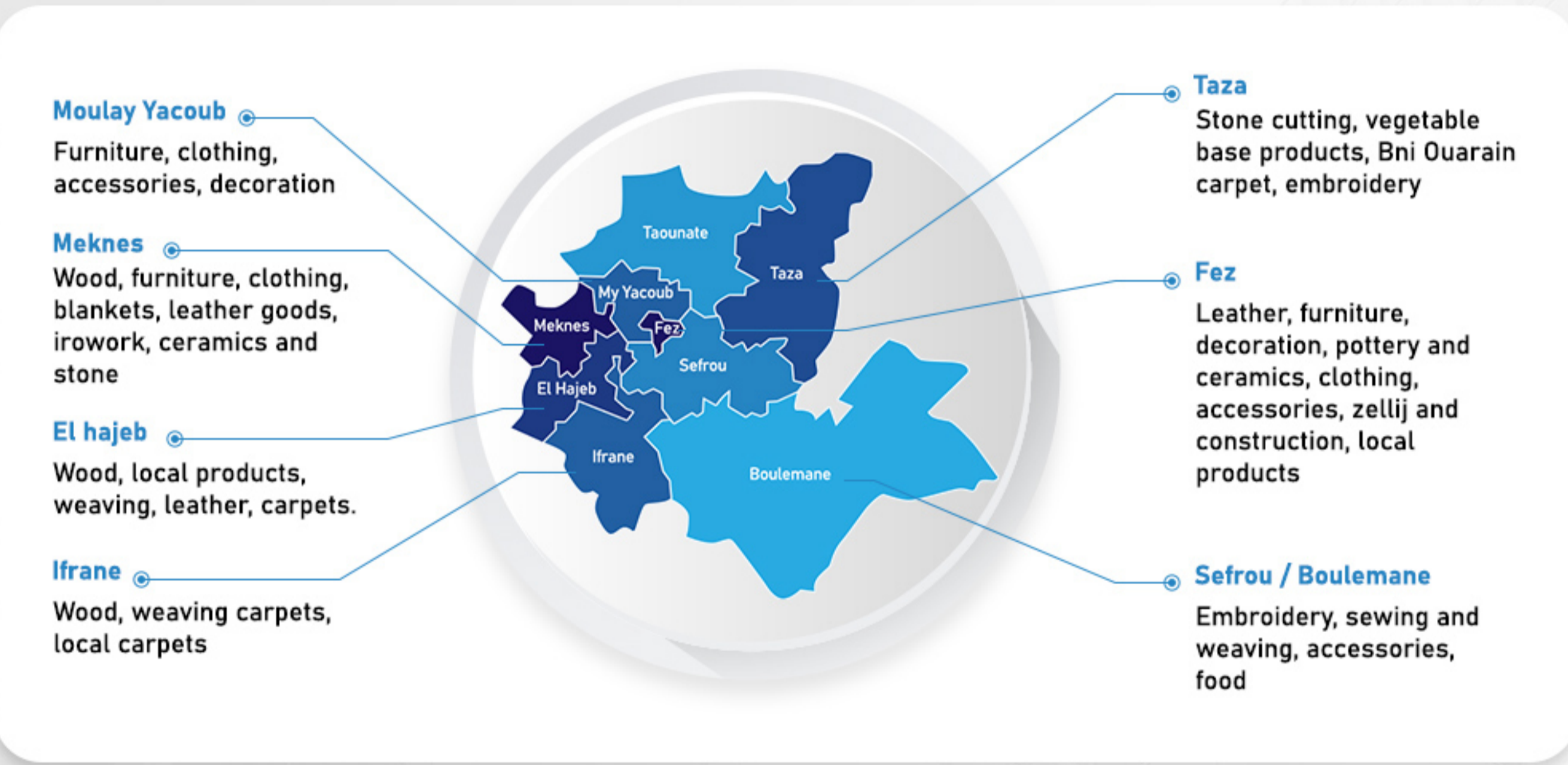




| Local brands | Location | Creation | Certified units |
|--------------------------------|-------------------------------------|----------|-----------------|
| Ziwani sliper | Fez | 2010 | 65 |
| Zellij of Fez | Fez | 2014 | 35 |
| Pottery of Fez | Fez | 2015 | 9 |
| Damascenery of Meknes | Meknes | 2018 | 5 |
| Doum (vegetable-base products) | Taza | 2018 | 5 |
| Marmoucha Weaving carpets | Marmoucha, Boulemane | 2015 | 5 |
| Ait Seghrouchen carpet | Ait Seghrouchen (Sefrouà) | 2015 | 5 |
| Bni Ouarain carpet | Bni Ouarain (Taza), Sefrou | 2015 | 5 |
| Ait Youssi carpet | Ait Youssi (Sefrou, west Boulemane) | 2015 | 5 |
| Bni Mguild carpet | Bni Mguild (Ifrane) | 2015 | 6 |
| Bni Mtir carpet | Bni Mtir (El Hajeb, North Ifrane) | 2015 | 5 |
| Handira of Middle Atlas | Middle Atlas | 2015 | 6 |
| Hanbel of Middle Atlas | Middle Atlas | 2015 | 6 |



Art Craft Products Specialties per Province/Prefecture



Elaboration of 'National Strategy to Safeguard Intangible Cultural Heritage'
 Implementation of the Strategy through training in 'Brocade' craft in Fez, within the framework of an agreement with the artisan Abdelkadert Ouazzani.

Preservation of 32 national trades, including 9 from Fez Meknes region.

| Craft | Location | Preservation date |
|------------------------|----------|-------------------|
| Inlaid wood | Fez | 2009 |
| Embroidered saddles | Fez | 2010 |
| Armory | Fez | 2014 |
| Brocade | Fez | 2015 |
| Wooden kobs | Fez | 2017 |
| Bellows making | Fez | 2018 |
| Ziwani leather tanning | Fez | 2019 |
| Ceramic | Meknes | 2011 |
| Damascenery | Meknes | 2012 |



المعلم
 Almaâlem

Networking of the website almaalem.artisanat.gov.ma
 dedicated to the preservation of trades and online training

♦ Structuring projects for the development of the handicraft sector following the High Royal Guidelines

Lorem Ipsum

Project

Development project of an artisanal complex and cultural activities at Place Lalla Yeddouna.

Investment amount (MMAD)

330

Description

Goal : Enhance economic growth through the promotion of heritage, particularly handicrafts, tourism and cultural activities :

- ▶ Rehabilitation of 11 historic buildings
- ▶ Renovation of 8 buildings
- ▶ Restoration of the historic bridge and development of the river and exterior spaces

Structuring projects for the development of the handicraft sector following the High Royal Guidelines



| Legend | مفتاح |
|---|--|
| 1 Leather goods | المصنوعات الجلدية |
| 2 Traditional sewing and other crafts | الخيطة التقليدية وحرف متنوعة |
| 3 Restaurant | مطعم |
| 4 Saddlery | صناعة السروج |
| 5 The Social Innovation Center for Youth -INDH- | مركز الابتكار الاجتماعي للشباب المبادرة الوطنية للتنمية البشرية |
| 6 Traditional weaving (Derraza) | النسيج التقليدي (الدراسة) |
| 7 Brass and Silverware | النحاسيات والفضيات |
| 8 Carpet and other crafts | الزربية وحرف متنوعة |
| 9 Pottery-Restaurant | الخزف - مطعم |
| 10 Exhibition Gallery | رواق العرض |
| 11 Traditional sewing-Innan Caftan | الخيطة التقليدية - جان القفطان |
| 12 Traditional Shoemaking (Kherraza) | الخرافة |
| 13 The House of Traditional Crafts Development Université Euromed de Fès | دار تنمية الحرف التقليدية الجامعة الأورومتوسطية بفاس |
| 14 Leather goods | المصنوعات الجلدية |
| 15 Heritage Center, Lalia Yadona square | مركز التراث ساحة لالة يدونة |

| Trades | Num. allocated premises | Num. beneficiary artisans |
|--------------------------------|-------------------------|---------------------------|
| Leather | 27 | 30 |
| Saddlery | 1 | 4 |
| Traditional weaving | 13 | 17 |
| Brassware | 17 | 22 |
| Carpets | 2 | 4 |
| Pottery | 7 | 9 |
| Traditional tailoring (Caftan) | 24 | 30 |
| Mechat | 2 | 2 |
| Traditional shoemaking | 16 | 24 |
| Borcade | 2 | 5 |
| Craft traders | 2 | 1 |
| Total | 113 | 148 |



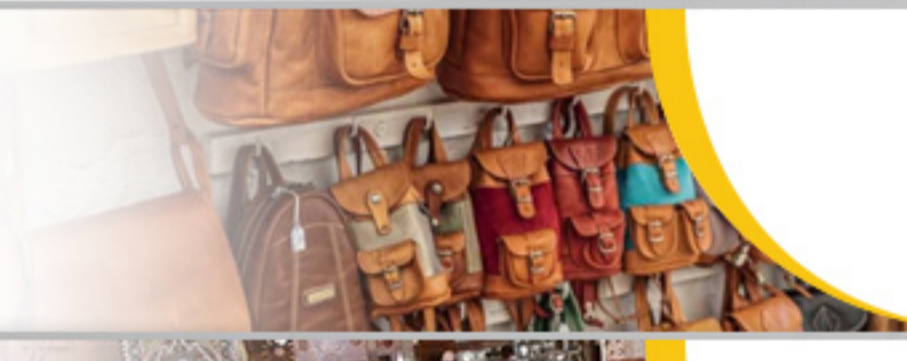
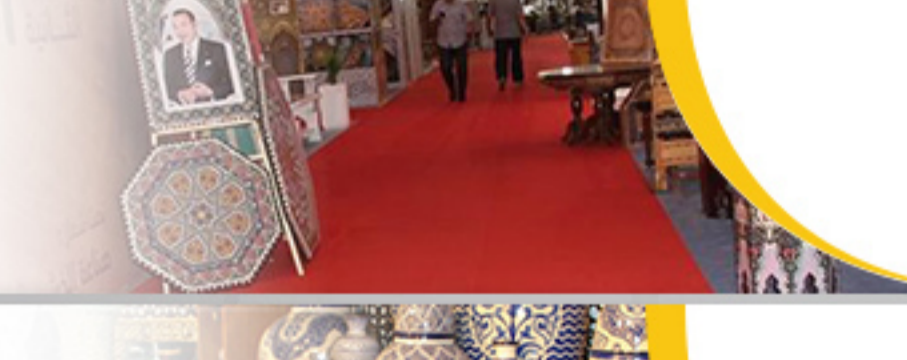

Structuring projects for the development of the handicraft sector following the High Royal Guidelines

| Project | Investment amount (MMAD) | Description |
|--|--------------------------|---|
| Program for promoting economic activities and improving the living environment in the Medina of Fez 2020-2024 | 670 | <p>Partnership agreement signed on March 2, 2020</p> <ul style="list-style-type: none"> Restoration and rehabilitation of historic heritage Promotion of urban spaces local social facilities/equipment Restoration of buildings at risk of collapse Economic and tourist attractiveness |
| Complementary program for the development of the Medina of Fez 2018-2023 | 583 | <p>Partnership agreement signed on May 14, 2018</p> <p>Program concernig rehabilitation and restoration of 118 sites in the Medina of Fez</p> |
| Rehabilitation and enhancement program of the Medina of Fez 2018-2023 | 800 | <p>Partnership agreement signed in the presence of His Majesty King Mohammed VI on October 22, 2018.</p> <p>Program for the restoration and maintenance of the architectural and urban heritage of the historic city of Meknes and the protection and restoration of historic urban scenes, in accordance with UNESCO recommendations on historic cities listed as human cultural heritage.</p> <p>Number of projects : 54 sites</p> |
| Program for the development of car parks, rehabilitation of public spaces and installation of an information system in the Medina of Fez 2017-2021 | 400 | <p>Partnership agreement signed in July 2017</p> <p>Program includes :</p> <ul style="list-style-type: none"> Development of 8 parking lots Land acquisition Social support Installation of paving adapted to the architectural framework of the Medina of Fez, including the repair of degraded openings facing these spaces Installation of information system |








Legend : ● Completed ● In progress ● Planned

Sources : Annual Activity Report – Ministry of Tourism, Handicrafts, Air Transport, and Social Economy – 2020 Year

➤ Several projects for the promotion of handicraft in the Region

| Project | Features | Components |
|--|---|---|
|  <p>AIN NOQBI CENTER OF PROMOTION & MARKETING OF BRASSWARE PRODUCTS</p> | <ul style="list-style-type: none"> Project owner : Regional Council Area : 2,500 m² Cost : 10 MMAD Situation : Under study | <ul style="list-style-type: none"> Professional spaces, showroom |
|  <p>CENTER FOR CONFERENCE & CRAFT WORKSHOPS</p> | <ul style="list-style-type: none"> Project owner : Wilaya of the Region Area 7,583 m² Jobs : 128 Cost : 35.5 MMAD | <ul style="list-style-type: none"> Strengthening of structures, infrastructures and equipments Floor and wall covering Exterior fittings, cladding |
|  <p>AIN BIDA CRAFT ZONE</p> | <ul style="list-style-type: none"> Project owner : Commune Ain Bida Cost : 60 MMAD Area : 16 ha Situation : Under study | <ul style="list-style-type: none"> Project as part of the Regional program of the creation of SME craft poles in Fez-Meknes Region. 705 lots, 120-200 m² for each. Activity showroom Multidisciplinary center |
|  <p>EXPANSION OF FEZ TRADITIONAL ARTS INSTITUTE</p> | <ul style="list-style-type: none"> Project owner : Ministry of Tourism, Air Transport, Handicraft and Social Economy Cost : 2,500 m² | <ul style="list-style-type: none"> Horizontal extension consisting of 4 separate buildings around the existing building. |
|  <p>BENSOUDA INCUBATOR NURSERY</p> | <ul style="list-style-type: none"> Project owner : Regional Council Area : 2 ha Cost : 40 MMAD (Fez-Mekne Region 32 MMAD, Ministry of Tourism, Air Transport, Handicraft and Social Economy 8 MMAD) Jobs : 100 | <ul style="list-style-type: none"> Regional observatory center for social and solidarity economy Assistance and training center Social innovation center Exhibition and marketing center Incubator center for partnerships projects in social and solidarity economy sector. |

➤ Several projects for the promotion of handicraft in the Region

| Institution | Training mode | Number of training spots | Location |
|---|---|--------------------------|--------------------|
|  <p>SPECIALIZED INSTITUTE FOR TRADITIONAL ARTS (ISAT)</p> | <ul style="list-style-type: none"> Residential Apprenticeship Continuous | 1,160 | Ain Noqbi |
|  <p>QUALIFYING CENTER FOR TRADITIONAL ARTS (CQPAT)</p> | <ul style="list-style-type: none"> Apprenticeship/traineeship Continuous | 240 | Ain Kadous |
|  <p>TRAINING AND QUALIFICATION CENTER IN CRAFT TRADES</p> | <ul style="list-style-type: none"> Apprenticeship Continuous | 340 | Batha |
|  <p>ARTISANS PERFECTION TRAINING CENTER (CPA)</p> | <ul style="list-style-type: none"> Apprenticeship Continuous | 1,200 | Tghat- Ain kadous |
|  <p>PROXIMITY TRAINING SPACE (EFP)</p> | <ul style="list-style-type: none"> Apprenticeship Continuous | 200 | Lamsalla |
|  <p>PROXIMITY TRAINING SPACE (EFP)</p> | <ul style="list-style-type: none"> Apprenticeship Continuous | 100 | Aouinate Al Hajjaj |
|  <p>PROXIMITY TRAINING SPACE (EFP)</p> | <ul style="list-style-type: none"> Apprenticeship Continuous | 100 | Marja |



INCENTIVE SYSTEM



➤ Governmental directives related to territorial and investment promotion

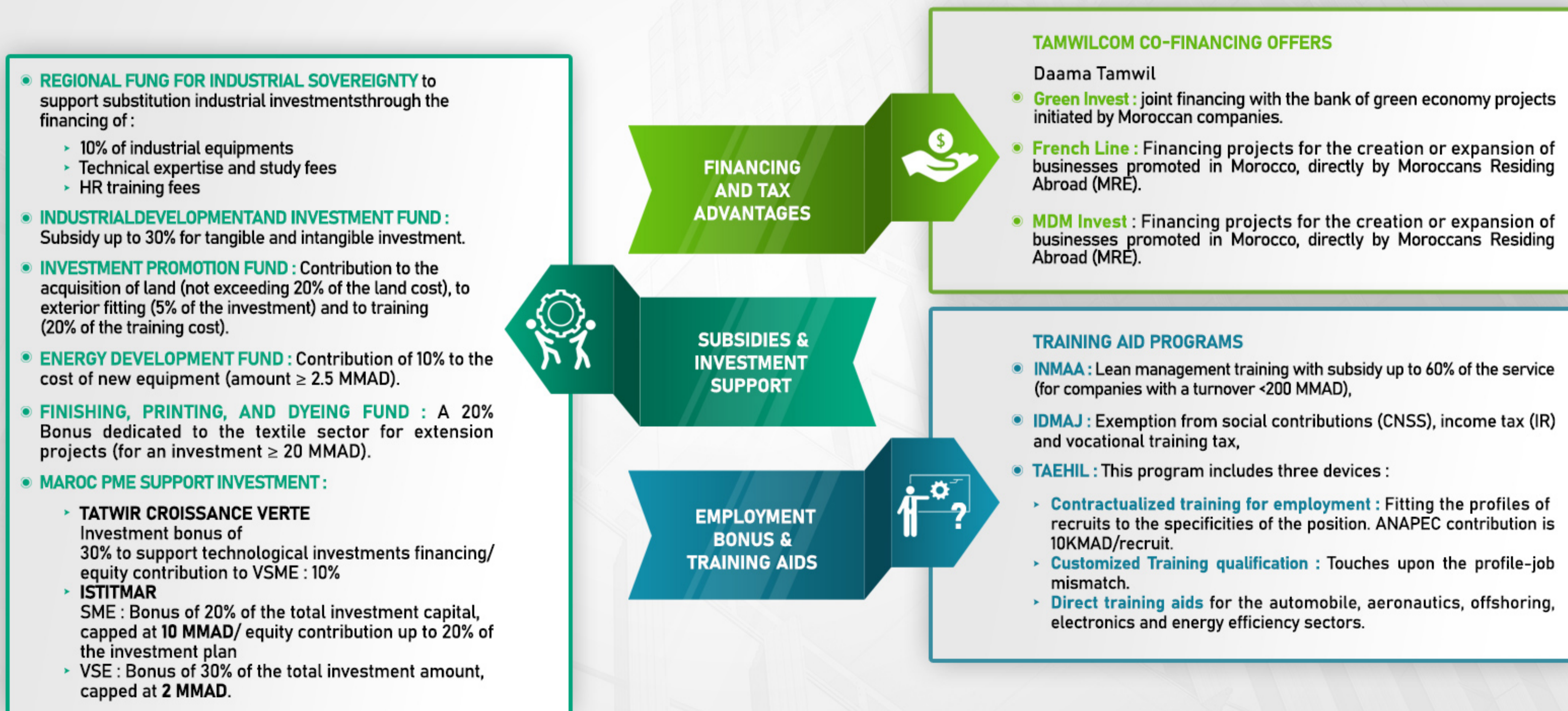


INCENTIVE SYSTEM AND SUPPORT MEASURES FOR THE INDUSTRIAL SECTOR



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- The Region has initiated an employment bonus and a regional investment support fund, which are added to the arsenal of support measures, subsidies, and aids established by the Government for industrial investors.



REGIONAL SYSTEM IN SUPPORT OF OFFSHORING PROMOTION IN THE REGION

Goals : Boosting investments in the high value added offshoring sector (ITO, CTO) through an installation bonus for the fittings and equipment of investors' premises in the Fes Shore park.

Budget : 10 MMAD

Support forms : Support from 4,000 to 5,000 MAD/m², capped at 2,000,000 MAD, on the basis of Specifications entrusted to Med-Z,

REGIONAL INDUSTRIAL SOVEREIGNTY FUND

Goals : Strengthen and revitalize the industrial fabric of Fez-Meknes region through direct subsidies to companies wishing to invest in import substitution projects, promoting local manufacturing and integration.

Budget : 55 MMAD

Support forms :

- Financing up to 10% of the acquisition cost of industrial equipment.
- Financing of technical studies and expertise fees.
- Participation in training costs for human resources recruited for the selected projects.

RENEWAL OF THE REGIONAL EMPLOYMENT BONUS SYSTEM

Goals : Incite investors to set up their projects within Fes Shore Park, and create jobs and added value,

Budget : 12 MMAD

Support forms : Financial aid of 6,000 MAD for each created job in the Offshoring sector

SUMMARY

NEW INVESTMENT CHARTER

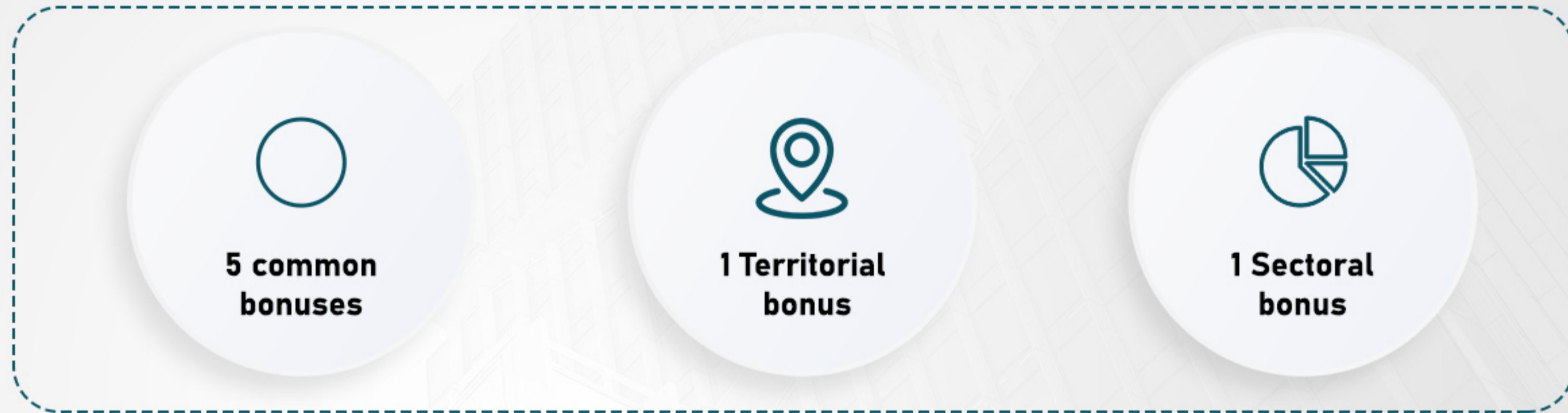
- 4 investment support mechanisms



4 SUPPORT MECHANISMS FOR INVESTMENT

➤ The new investment charter set up a complete support system via 4 mechanisms

1 Main support mechanism :
bonuses can reach up to
30% of the investment
budget








Specific mechanism



➤ Main support mechanism

5 common bonuses

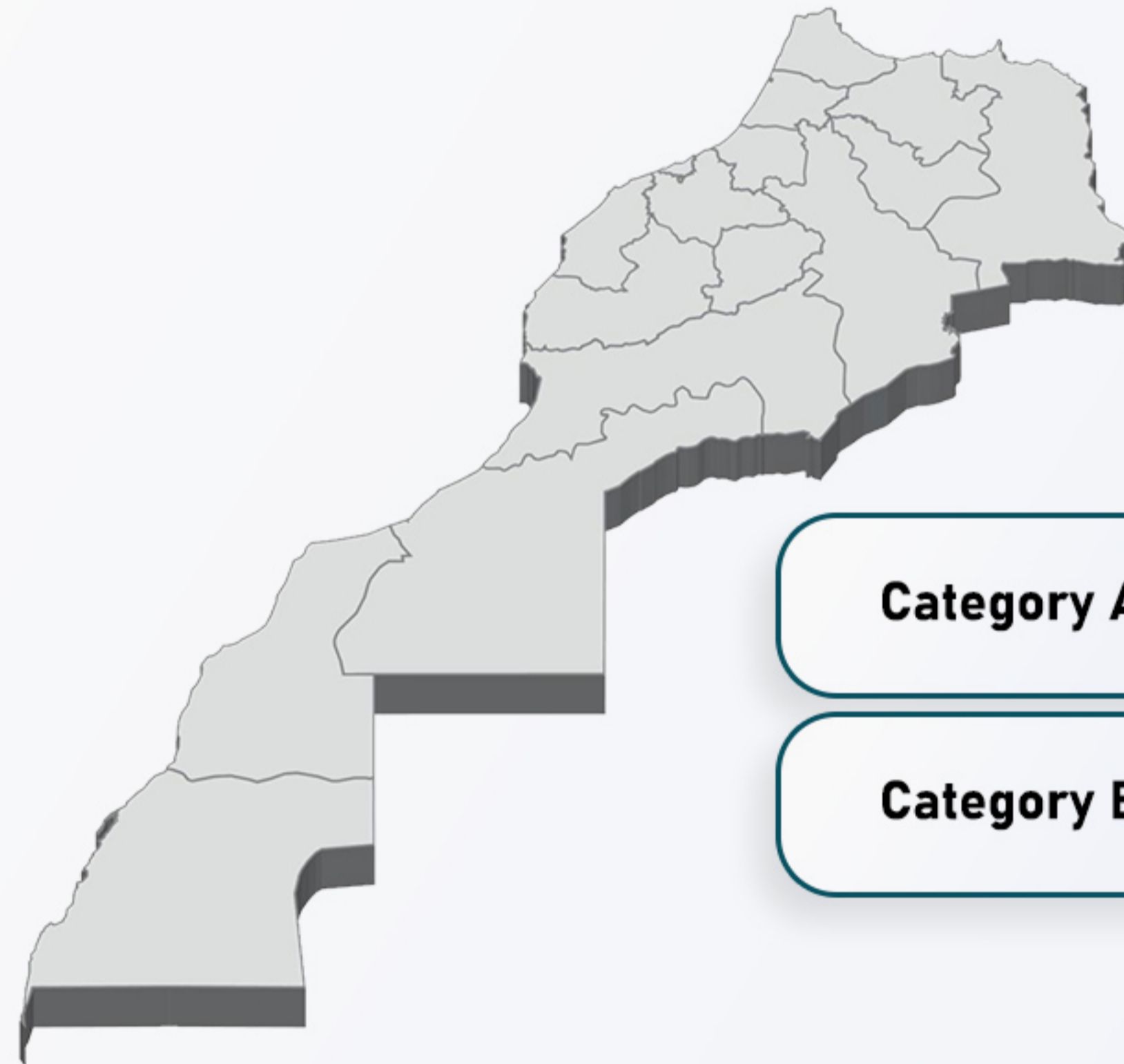
Bonuses for investments in line with the high Royal Guidelines, the objectives of the NDM and the government program

| | | |
|--|-------------|-----|
|  Employment ratio/CAPEX | >1 and ≤1.5 | 5% |
| | >1.5 and ≤3 | 7% |
| | >3 | 10% |
|  Employment gender ratio (Female payroll >30%) | | 3% |
|  Future-oriented and upskilling professions | | 3% |
|  Sustainable development | | 3% |
|  Local integration | | 3% |

➤ Main support mechanism

1 Territorial bonus

A bonus to encourage the least favored provinces



Category A

10%

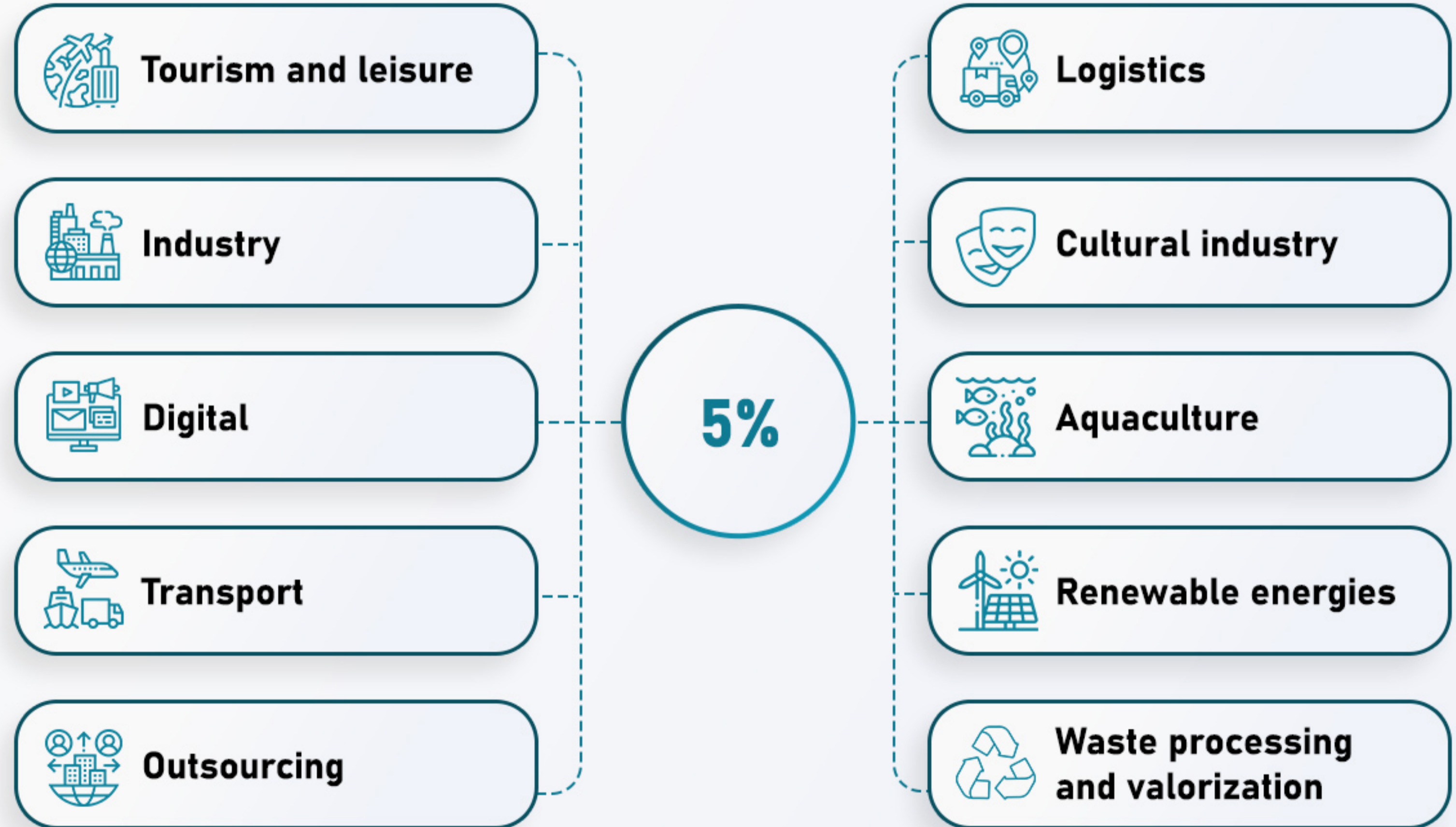
Category B

15%

➤ Main support mechanism

1 Sectoral bonus

A bonus dedicated to priority sectors



➤ Main support mechanism

Eligibility criteria

Total amount of the investment project

≥ 50 MMAD
+

A minimum employment threshold

OR

Number of stable created jobs

≥ 150 jobs

➤ Strategic projects mechanism

Specific support measures, in particular for projects of a sovereign nature or with the capacity to attract ecosystems

Strategic projects benefit from advantages negotiated on a case-by-case basis



➤ Strategic projects mechanism

Eligibility criteria

Projects with a total investment amount \geq 2BMAD, and meeting at least one of the following criteria :

Projects in defense industry

OR

Effectively contribute to ensuring Morocco's water, energy, food, or health security.

Have a significant impact on creating direct or indirect jobs.

Play a key role in enhancing Morocco's economic influence and strategic positioning at the regional, continental, or international level.

Generate knock-on effects in the development of ecosystems or sector-specific activities.

Make a substantial contribution to the advancement and adoption of cutting-edge technologies.

➤ Mechanism for international expansion of Moroccan firms

Measures to strengthen Morocco's economic influence in the world

A necessary scheme to support Moroccan economic influence in Africa



➤ Mechanism for Very Small/Small & Medium-Sized Enterprises

Measures to simplify access to financing and support mechanisms

A new generation of entrepreneurship



