



# **MED PORT 2015**

## **MOROCCAN PORT STRATEGY**

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# AGENDA



- 1** Presentation of National Port Sector
- 2** National Port Strategy on the horizon 2030
- 3** Port safety and sustainable development
- 4** Human resources training and skills development
- 5** Cooperation with African ports

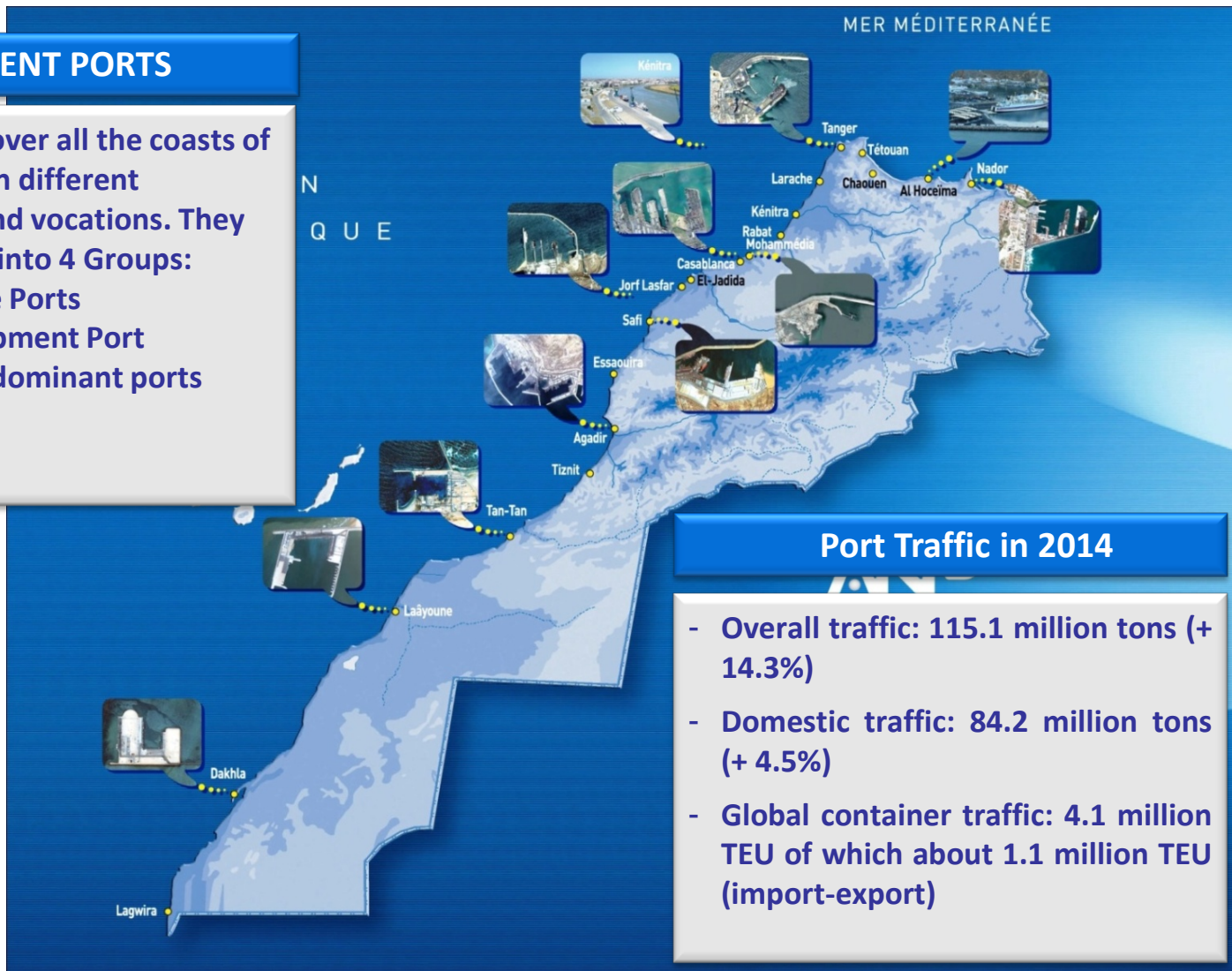


# NATIONAL PORT SECTOR OVERVIEW

## CURRENT PORTS

38 ports spread over all the coasts of the Kingdom with different characteristics and vocations. They can be classified into 4 Groups:

- 12 versatile Ports
- 1 Transshipment Port
- 19 fishing dominant ports
- 6 marinas



## Port Traffic in 2014

- Overall traffic: 115.1 million tons (+ 14.3%)
- Domestic traffic: 84.2 million tons (+ 4.5%)
- Global container traffic: 4.1 million TEU of which about 1.1 million TEU (import-export)



## LEGAL FRAMEWORK

### The port sector governance system

Moroccan port sector is governed by the law on ports 15-02 which defines



The three levels of intervention

The State :  
Ports strategic  
planning

Ports National  
Agency : Port  
Authority and sector  
regulation

Operators:  
Commercial  
Activities and  
services

# NATIONAL PORT STRATEGY ON THE HORIZON 2030



Efficient ports, catalysts of competitiveness of the national economy, drivers of regional territorial development and key players in positioning Morocco as a logistics platform in the Mediterranean sea



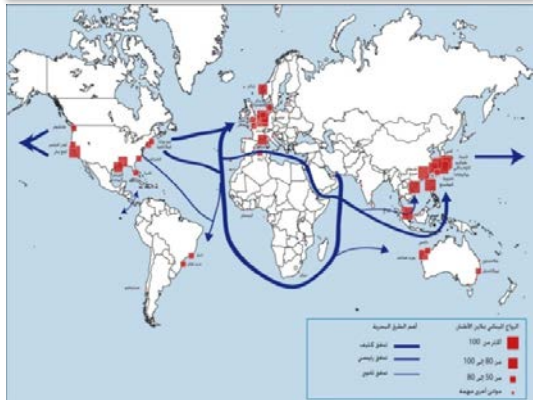
1- To support the competitiveness of the economy.

2- To capture a market share of international seaborne trade and cruising traffic, and integrate the port system within the regional transportation network

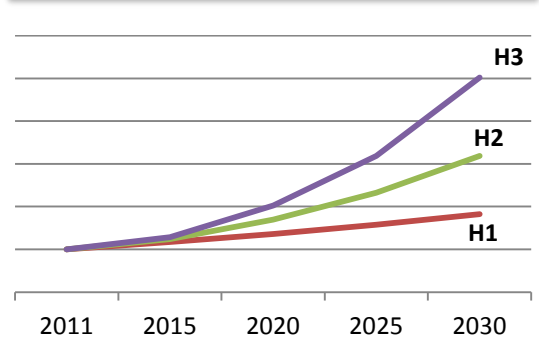
3- To contribute to the regional balance of the kingdom and promote social and human development.

Prospective and participative approach oriented towards the port's client and based on three kinds of traffic:

## International Opportunities



## Economic Growth Forecasts



## Sectorial strategies



Significant increase in traffic and port activities in the medium and long term



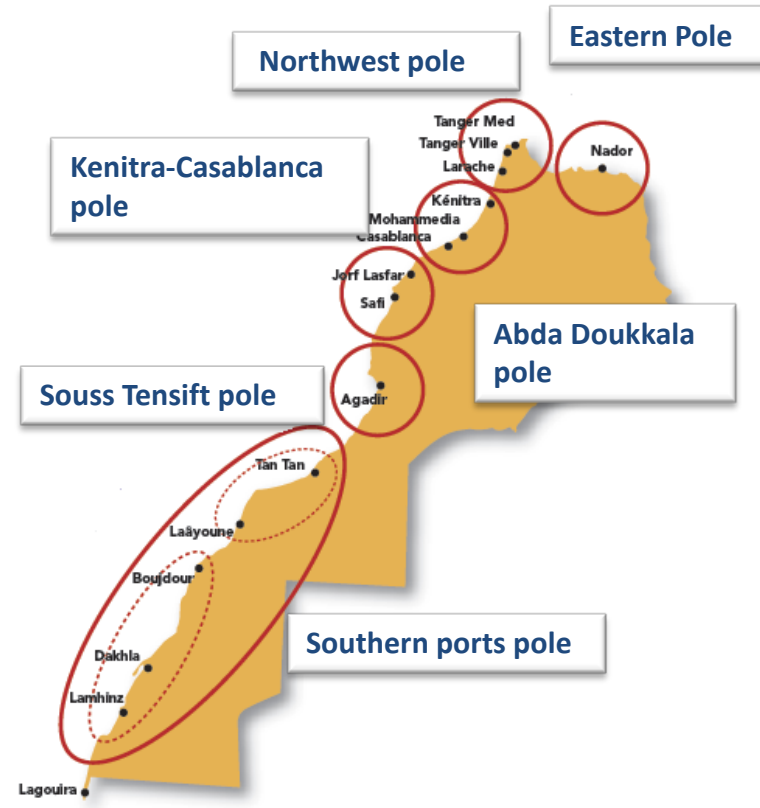
# NATIONAL PORT STRATEGY ON THE HORIZON 2030



Strengthening and adapting port's supply to the development of maritime transport sector

Balanced distribution of port infrastructure along the Moroccan coast in order to face both the traffic growth and the local development

New approach based on the concept of port poles, in order to increase the value of the comparative advantages of each region (its resources, its towns, its infrastructure ..)





# NATIONAL PORT STRATEGY ON THE HORIZON 2030

## Important extensions



Port of Mohammedia



Port of Casablanca



Port of Jorf Lasfar



Port of Agadir

## Construction of new ports



New Atlantic Port of Kenitra



Port of Nador West Med



New gas port of Jorf Lasfar



New port of Safi



New Atlantic Port of Dakhla

## Integration of ports into their urban environments



River port of Kenitra



Port of Tanger Ville



Port of Casablanca



Port of Safi Ville



Port of Al Hoceima



# STRATEGY FOR THE DEVELOPMENT OF SHIPBUILDING AND SHIP REPAIR PORT INFRASTRUCTURES



## AIMS

- Identify and analyze the different market segments of shipbuilding and ship repair activities;
- Define for Morocco the appropriate positioning for each market segments;
- Define a planning master plan for the development of the port infrastructures required to support this strategy;
- Settle on a strategy and an action plan for the development of these activities

## CONSISTENCY

- **Phase 1:** strategic diagnosis of the shipbuilding and ship repair activities
- **Phase 2:** definition of a strategy of development of harbor facilities for the activities of construction and naval repairs;
- **Phase 3:** define a master plan for the port infrastructures required for the shipbuilding and ship repair activities ;
- **Phase 4:** working out of the measures of support and definition of the road map.

## PERIMETRE OF THE STUDY

SHIPBUILDING

SHIP REPAIR

SHIP  
CONVERSION

SHIP  
DISMANTLING

## STATE OF ADVANCEMENT

The two first phases are achieved, the third and fourth phase are in progress



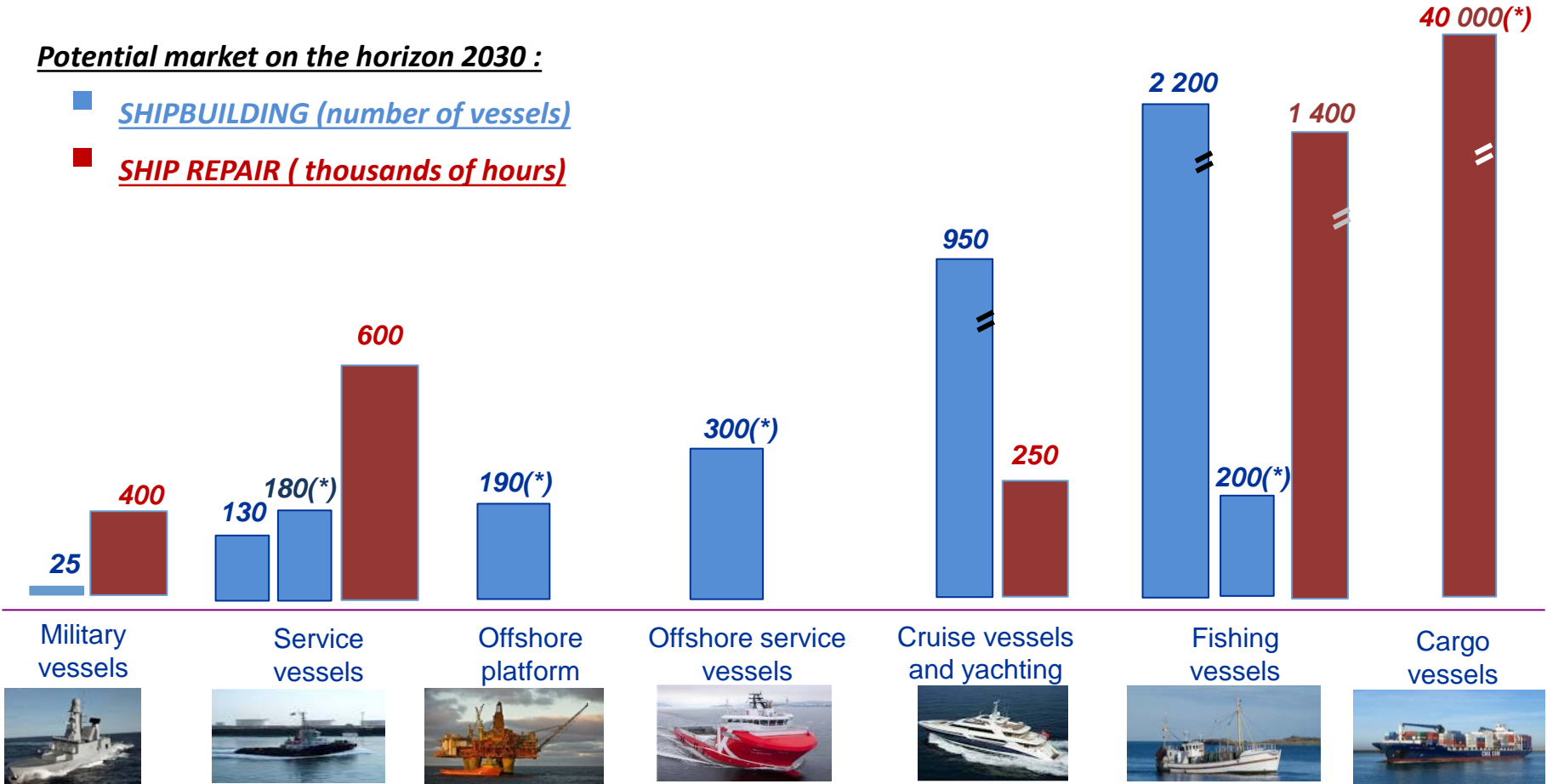




# STRATEGY FOR THE DEVELOPMENT OF SHIPBUILDING AND SHIP REPAIR PORT INFRASTRUCTURES

▪ **Potential market on the horizon 2030 :**

- SHIPBUILDING (number of vessels)
- SHIP REPAIR ( thousands of hours)



(\*) West Africa Market

▪ **Potential market for SHIP DISMANTLING : 6 300 vessel of average tonnage (500 < X < 25 000 tjb) coming from North America and UE.**



## PORT SAFETY AND SUSTAINABLE DEVELOPMENT

Moroccan ports authorities has integrated safety, security and sustainable development into its strategic and operational objectives. It supports environmental protection, economic development, and social progress by encouraging the collective responsibility of ports.

Some Action Plans are taken to keep our ports safe such as :

- ❑ Ensuring the continued compliance of ports and port facilities to international regulations, particularly the ISPS code : acquisition of new equipment “ scanners, CCTV ”, trained staff, an established program of trainings and drills...
- ❑ Improve the safety of ports: acquisition of equipment, audit of the classified installations, drills...
- ❑ Standardizing and implementing rules and work procedures governing the field of safety and security ;
- ❑ Establish a management system of the safety and the security in ports (SM2S);
- ❑ Establish legislative and regular acts to respond to the increasing development of ports and constraint of their management ( Law on Port’s Police, Security Decree ...)
- ❑ Certify all harbormasters to comply with ISO 9001 version 2000 ( Casablanca will be certify ISO - may 2015)

Key actions undertaken in the environmental field are :

- Strategic studies for the preservation of the port environment, to comply with national and international regulations (ports reception facilities, Dredging,...);
- Study of Environmental Impact of infrastructure projects;
- Participating in the organization of a national bi-annual drill (SIMULEX) to fight against accidental marine pollution by hydrocarbons, test ports’ emergency plans, and strengthen coordination with stakeholders



# HUMAN RESOURCES TRAINING AND SKILLS DEVELOPMENT



**Morocco has Port and maritime Training Institutes, which are positioned as a training platform in port business, serving the port operators and authorities in Africa.**

## Vision

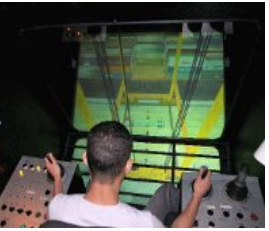
- ✓ Programs to improve the operational efficiency of operators to improve their own competitiveness;
- ✓ Plate reference training forms in Africa.

## Training Tools

- ✓ Higher Institute of Maritime Studies (ISEM)
- ✓ Port Training Institute (IFP)
- ✓ Internship training and human resource development of port institutionals;
- ✓ Tripartite cooperation for the training of human resources (2.095 days and 97 people trained during 2013-2015).

## Aims

- ✓ Development of training programs to meet the needs of port operators;
- ✓ Assistance and methodological support to operators in the area of training to port trades;
- ✓ Improving teaching tools by the introduction of new technologies (Simulator)
- ✓ Development of regional and international cooperation in training;
- ✓ Prospective studies to identify appropriate service offerings;
- ✓ Formalization and implementation of training development plans.





## COOPERATION WITH AFRICAN PORTS

**South-South cooperation in the port and maritime sector is a strategic tool for developing exchange of experiences with African partners through the establishment of cooperation agreement and twinning between national and African port places .**

- ❑ Over than 20 agreements were signed with African ports;
- ❑ Many African countries are associated with Morocco by cooperation agreement: South Africa, Cameroon, Liberia, Senegal, Angola, Republic of Congo, Democratic Republic of Congo, Coe d'Ivoire, Benin, Mauritania, Sudan, Egypt, etc.
- ❑ Morocco holds also the presidency of the Union of Port Administrations of North Africa (UAPNA)

**The main areas of cooperation with African ports are :**

- Studies and expertise: port facilities, maritime signaling, port control, ISPS Code, Port logistics, fight against pollution, etc;
- Training and skills development;
- Information exchange (Port traffic, performance indicators, Conveying, New methods and procedures for management, etc.);
- Assistance by Moroccan experts on specific topics: terminal handling, safety, transit of dangerous goods, etc.