

Vol 3 Issue 5 Feb 2014

Impact Factor : 2.1002 (UIF)

ISSN No : 2249-894X

*Monthly Multidisciplinary
Research Journal*

*Review Of
Research Journal*

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Welcome to Review Of Research

RNI MAHMUL/2011/38595

ISSN No.2249-894X

Review Of Research Journal is a multidisciplinary research journal, published monthly in English, Hindi & Marathi Language. All research papers submitted to the journal will be double - blind peer reviewed referred by members of the editorial Board readers will include investigator in universities, research institutes government and industry with research interest in the general subjects.

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TERRITORIAL POLICIES AND REGIONAL GROWTH : TOWARDS THE EMERGENCE OF A NEW CENTER-PERIPHERY MODEL (THE CASE OF TANGIER)

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Abstract:

The main factors of Morocco's territorial attractiveness remain abundant, cheap, and unskilled workforce, natural resources, and the proximity to Europe. The result is a high focus of Moroccan industrial sectors in activities with low technological content and marginalisation of high value-added industries that allow the transfer of technology and the know-how to Morocco. In addition, there is a limited foreign direct investment (FDI) on the productive fabric. This is due to the shortcomings of an absorptive capacity needed to acquire new technologies.

KEYWORDS:

Territorial policies, infrastructure in hosting countries, regional development.

INTRODUCTION :

Another factor which hinders the industrial development is that the economic activity remains highly concentrated, distributed geographically unequally throughout the Moroccan territory. Indeed, the regional distribution of industrial activity in Moroccan territory highlights the core-periphery model proposed by Krugman (1991a, 1991b). Peripheral regions lag behind the "Centre" in terms of infrastructure, investment, economic and social development. In 2004, 40% of Morocco's GDP was centered on 1% of the territory.

The Grand Casablanca region is the core of the national industrial production system. It represents the majority of the national industrial production (49% in 2004). This region also realises a significant volume of industrial exports, with 35.3% in 2004 at the national level (DEPF, 2006).

What then are the policies undertaken by Morocco to meet the needs of companies seeking a competitive advantage and to stimulate the emergence and development of new businesses and new industries? This work aims to shed light on this issue and to identify the content and form of public territorialised actions implemented, including the launch of the plan "Emergence" and the creation of competitiveness clusters.

The trend of the Moroccan state to implement policies more favorable to FDI promotes the emergence and development of new businesses and new industries and stimulates economic growth. The case of the Tangier-Tetouan region illustrates this reality and supports the emergence of a regional development center.

1.The development of hosting infrastructures:

The Agency for Promotion, Economic and Social Development of the Prefectures and Provinces of the Northern Kingdom (APDN) was created to promote the strengths of three regions: Tangier-Tetouan, Taza-Al Hoceima-Taounate and the northern part of the Oriental, and especially implement action programs that can stimulate the growth of the area.

The main facilities are divided into seven major ports (including Tangier, Nador), five international airports (Tangier, Tetouan, Al Hoceima, Nador and Oujda), ten dams, 300 km of railways and 10,750 Km 6700 Km of roads covered (APDN, 2003). For example, Tangier was connected to the economic center of Casablanca and the administrative center of Rabat only by a highway. In this context, the investment could not be encouraged. Although currently, things are under significant change.

In 2005, the highway Tangier-Kenitra was finalised to join the economic capital in three hours. Highways of Tetouan and Tangier-Fnideq-Oued Rmel (service port Tanger-Med) are finalised in 2007. According to the department in charge of the Highway Tangier-Oued Rmel, in order to attract investors, it is important that their goods arrive at the port of Tangier and to all other regions of the country in the best time and without damage.

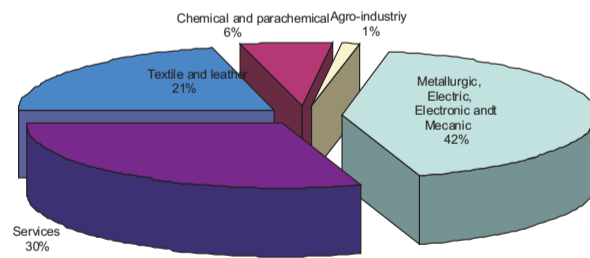
1.1.The export free zone of Tangier :

The creation of free zones is one of the main components of the national economic policy which aims to support exports. Furthermore, foreign investment promotion tops the agenda and as benefit from proximity advantage to the European market. The Export free Zone of Tangier-Boukhalef created by Decree No. 2.96.511, 10/11/1997 falls within the priority program of the hosting infrastructure that also envisages another project that is a free zone of exportation of Nador an area of ? ? 300 ha, established by Decree No. 2.96.512 20/11/1997. However, this has not been launched because the government effort was restricted on the Tangier free zone, considered the pilot project adopted in the framework of the new policy of hosting-infrastructures.

From a regional perspective, public policy and agglomeration economies play an important role in improving territorial attractiveness. Industrial clusters contribute to transform the specialisation of an area. Indeed, the region of Tangier is moving towards a diversification of its industrial activities and the emergence of new specialties such as automotive and aerospace industries. However, as threats confronting the textile and clothing sector, the government has launched a new industrial policy geared specifically towards new promising sectors forming a driving force for industrial development and enabling Morocco to diversify its export specialisation. Recently, there has been a continuing specialisation in the textile and clothing sector and emergence of new centers of specialisation: electrical and electronics, automotive and aerospace.

The development of regional industrial production Tangier-Tetouan is essentially related to the electrical and electronic industries that perform an ever more important part at the national level from 7.1% in 1994 to 28.8% in 2004 of total production in this sector. This result is due in large part to the success of the Tangier free zone (TFZ) to attract the largest manufacturers worldwide. This places the metallurgical, electrical, electronic and mechanical sectors at the top of the list of the most developed in the area. These industries represent 42% of the total volume of investment, more than 1.2 billion Dirhams (in July 2005). For example, in summer 2007, investment was of 1.5 billion Dirhams.

Figure 1: Investment by industry in the free zone of Tangier 14/07/2005.



Source: Tangier Free Zone, status of the assessment of shares 14/07/2005.

The current trend in the industrial sector in the region Tangier-Tétouan is moving towards higher value-added industries, with a gradual move to other textile industries dedicated to export to Europe, such as automotive wiring and the aeronautical subcontracting. Indeed, the city of Tangier and in particular the export free zone hosts wiring companies such as Japanese Yazaki which preferred Morocco to China, Automotive Wiring Systems Morocco (AWSM) subsidiary of Volkswagen, Delphi, Lear Corporation. Also, the Renault-Nissan project installed the largest industrial complex in Africa. These activities are nascent export sectors.

The zone is also hosting aircraft equipments, especially those who work for Airbus and Souriau DL Aérotechnologies. Similarly, the United States marks its presence through Polydesign System, specialised in textile products for the automotive industry. According to a survey conducted by the firm LMS-CSA, during the months of June and July 2007, 92% of companies operating in the free zone are satisfied with the service and enchanting hospitality and assistance in the area. 93% of professionals surveyed say they would recommend TFZ to other businesses (Abjiou, 2007).

The secret of the success of the TFZ, in addition to its strategic location, resides behind several advantages that have encouraged many companies to move there. Of course, its industrial zone and bonded logistics zone meet international standards relating to the quality of equipment and services, the safety of people and property and the preservation of the environment. The foundation Hassan II provides grants for the acquisition of land for activities such as aerospace subcontracting and textile or automobile. This grant may reach 100% of the land price based on a maximum cost of 250 Dirhams/m². It should also be noted that the zone benefits from simplified administrative procedures and an attractive tax system.

In the presence of production externalities, the existence of a slight initial advantage for a region can lead to the emergence of a highly polarised zone (Fujita and Thisse, 2003). This is the case of Tangier free zone which has specific advantages. Indeed, this area has several attractive factors, which attract foreign investment: (proximity to Europe, low cost labor, tax benefits) which has incited initial geographical concentration of industries. Then, progressively, the success of the area to attract FDI generates positive externalities. At this point, the choice of location of companies wishing to locate in the zone also depends on the number of companies already present. By putting their efforts together, they create local demand for a specific product and attract other businesses.

In 2007, there were already 15 companies specialising in aerospace established in the zone and employing approximately 1,500 people. The area is considered as the “center of excellence”. The proof is that manufacturers show good results and plan to increase their investments and increase their production capacity. Indeed, in June 2007, the TFZ signed two new contracts with the two French groups (Souriau and Dion aircraft) already based in the zone.

“Souriau Group” specialised in the manufacture of connectors for the civil aviation industry and a military project intends to increase the production capacity, with an investment of 40 million Dirhams. Ultimately, it will create 500 permanent jobs. “Dion aircraft Group” specialising in precision engineering for aerospace envisages an investment of 30 million Dirhams, with the creation of about 50 jobs stable (Tangier Free Zone, 2007).

1.2. Tangier-Mediterranean port:

The city of Tangier is Morocco's gateway to Africa and both the Mediterranean and the Atlantic, it is organized to become the main center for international affairs of the southern basin of the Mediterranean. Besides its strategic position, it is the second largest commercial port in the country after the port of Casablanca. However, with the importance of domestic and foreign investment and the emergence of new activities in the city of Tangier, the port cannot cope with the growth in traffic.

The new Tangier Mediterranean port built around a logistic, industrial, commercial and tourism zones will have the opportunity to strengthen ties of the Euro-Mediterranean region of Tangier-Tétouan and enhance its strategic position for better integration into the international trading system. Free zones of the new harbor hope to create no less than 100,000 jobs. This complex is close to all communication channels: Tangier Port highway, railroad Tangier Port and the airport. Among the objectives of the construction of the new port:

- Create jobs by attracting export businesses in free zones;
- Promote the penetration of foreign markets by exporting companies;
- Promote the development of tourism;
- Balancing the land planning by giving the North a major economic center and good infrastructure;
- Relieve Tangier region in order to focus on the tourism sector and make it a cultural attraction.

Taking advantage of a privileged position at the intersection of two major global waterways, the new Tangier Med port will capture much of the container of transshipment traffic and will host increased trade between the European market and Morocco. It envisages the creation of over 250,000 jobs by the completion of the project.

The first phase of Tangier Med project was inaugurated on 28 July 2007. An event marked by the construction of the largest container ship in the world: 397m long, 56m width and 100,000 tons of cargo loaded (Clémentot, 2007). This first installment includes superstructure port, 60km motorway, 45km from railway and ring roads around the region Tangier-Tétouan. With eight giant cranes, the first dock port complex in Tangier with a length of 800m (2040m term) can accommodate ships of 450m long. The concession of the port has been assigned to the group for 30 years APM Terminals, a subsidiary of Maersk, which is the third largest port operator worldwide.

It is expected that traffic in Tangier Med I will reach 3.5 million containers per year by 2015. With the second stage of the project, Tangier Med II starting in 2012, Tangier Med will be extended to have the capacity to handle 8.5 million containers. Tangier Med will compete with the Spanish port of Algeciras, limited to 7 million containers and be ahead of the current first container port in Africa, Durban

With the successful experience of the free zone and the construction of the new port, the regional development center and tourism and urbanism ministries expect an economic boom in the region. To achieve this, the State considered in parallel the development of tourism which can make advantage of plenty of opportunities such as the hospitality and the beauty of the natural sites.

1.3.The emergency plan :

The pilot plan was entrusted to the Ministry of Trade and Industry. In fact, the steering committee includes several ministries and is chaired by the Prime Minister. The study which identified seven sectors has been entrusted to an international firm, in this case, McKinsey. The results of the study should be implemented into action plans for identified sectors while maintaining a global perspective.

Other actors in this plan are ministerial departments and several public actors, such as regional development agencies. There are also the economic actors, such as the CGEM and professional associations involved in sectors such as the Federation of Information Technology, Telecommunications and Offshoring.

Among the main objectives of this program is the upgrading of industrial structure, modernisation and strengthening of competitiveness and the implementation of a proactive policy oriented particularly towards new promising sectors constituting a driving force for industrial development and export promotion. In the automotive and electronics industries, the "Plan Emergence" foresees the creation of two cities "Automotive City" and "Electronic City" in a zone near the port of Tangier Med. Morocco aims to position itself 10% of automotive components to provide 28 assembly plants in Spain, Portugal and France (Benyouref, 2007). In 2007, this sector had more than 100 manufacturing facilities and employed a total of around 26,000 people.

The announcement of the Renault-Nissan Alliance, in September 2007, to implement the largest industrial complex in Africa at Tangier Med with 1 billion Euros attracted high dynamic. Signed by the Prime Minister under the chairmanship of the king, the memorandum of understanding covers the installation of site for the production of cars with a capacity of 400,000 vehicles per year, 90% for export.

By combining the strategic location and low cost, Morocco plans additional revenue of 12 billion Dirhams and 51,000 new jobs in ten years. Another promising sector growing in Morocco is that of aviation. In 2005, it had already achieved revenue of approximately € 60 million, with the creation of 2,200 jobs. More than 30 companies are already operating and more are intending to do so. Through this sector, the Kingdom aims to achieve an additional revenue from 150 to 200 million in 2008 (Mahmoudi).

Like emerging industries, Morocco is also focusing on relocation services. Benefiting from its proximity to Europe, Morocco has integrated offshoring in the "Plan Emergence", numerous measures have been taken (Benyahia)

The establishment of four zones (Casashore, Rabatshore, and Tangiershore Marrakechshore) specially dedicated to the offshoring, with better infrastructure and at lower costs services (\$ 7 / m2/month).

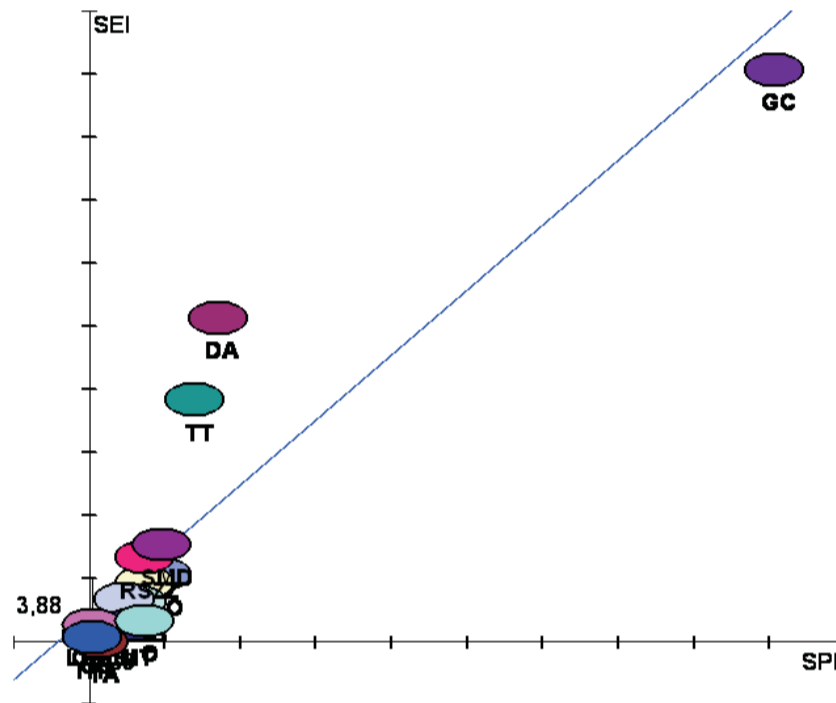
A national training plan focused on the offshoring jobs which envisages 20-25000 jobs by 2009. An aid to post-employment with support for all training up to 50,000 Dirhams. Simplification of fiscal and administrative procedures.

Financial assistance for the installation and very simplified tax procedures (IS 0% and lower tariffs to 2.5%).

2.The emergence of the regional development pole of Tangier :

The analysis of regional statistical data of 2004, relating to industrial production and industrial exports revealed significant regional differences. In Figure 1, the horizontal axis (SPI) represents the percentage share of each of the sixteen regions of administrative division in the national industrial production. The second axis (SEI) is their share in total exports of the country.

Figure 2: Regional mapping of the structure of industrial production and exports to Morocco (2004).



Source: Cartography performed on the Sphinx software, from data of the Directorate of Studies and Financial Forecasts (DEPF, 2006).

SEI : structure of industrial exports, SPI : structure of industrial production.

GC: Grand Casablanca, DA: Doukala-Abda, TT: Tanger-Tétouan, RSZZ: Rabat-Salé-Zemmour-Zaer, CO: Mpumalanga, FB: Fez-Boulmane, GCB: Gharb-Chrarda-Beni Hssen, GS: guelmim-Essemara, LBSH: Laayoune-Boujdour-Sakia Hamra, MTH: Marrakech-Tensift-Al Haouz, MT: Meknès-Tafilalet, ODL: Oued Ed-Dahab-Lagouira, O: Oriental, SMD: Souss-Massa-Daraa, TA: Tadla-Azilal THT: Taza-Al Hoceima-Taounate.

Equation of the regression line: $SEI = 0.74 + 1.63 * SPI$

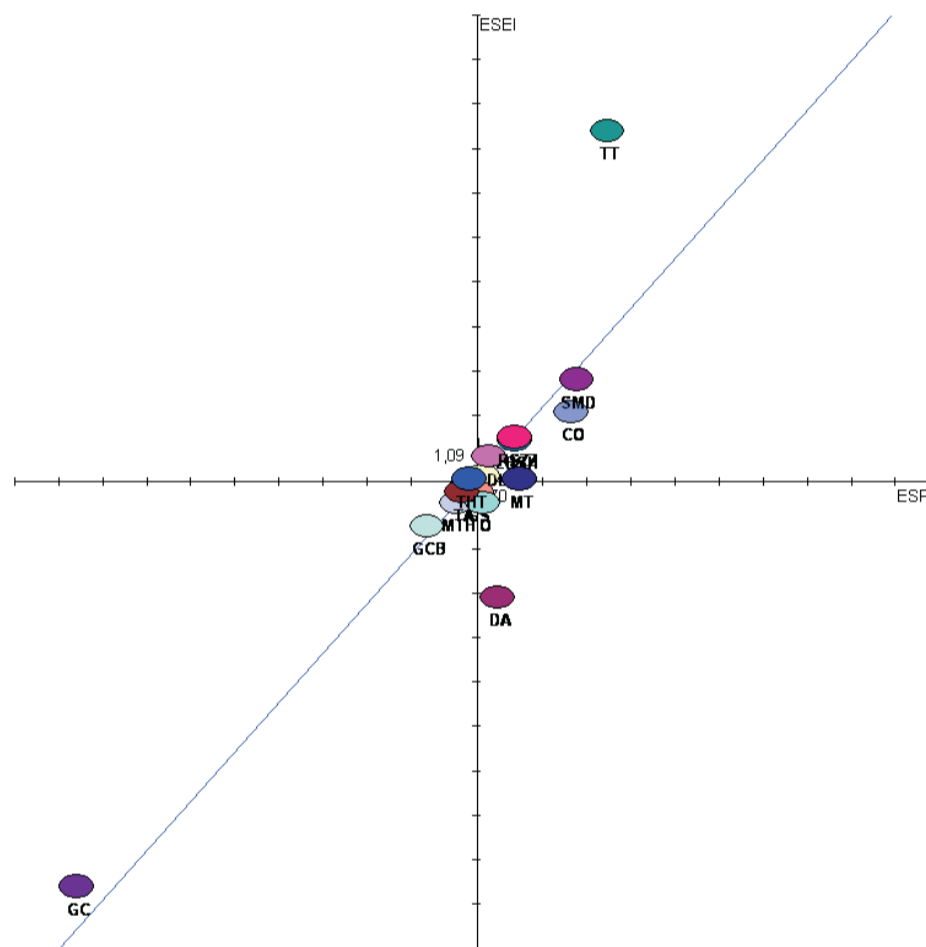
The correlation coefficient which is 0.91 reveals a highly significant linear dependence between two variables (SEI/SPI). Regional industrial production explained 83% of the variance in regional industrial exports. The industrial development promotes industrial exports and trade openness which can attract more investment.

The regional distribution of industrial activity in Moroccan territory shows similar patterns to the core-periphery model proposed by Krugman (1991a, 1991b). The Grand Casablanca region is the core of the national industrial production system. It represents the majority of the national industrial production (49% in 2004), which focuses mainly on chemical and related industries (41%) and food industry (22.4%). This region achieves a significant volume of industrial exports (35.3% nationally) with 52.7% from the textile and leather industries and 21.5% of chemicals and parachemicals 1999 and 2004.

Despite the important role of the central area, the industrial activity has witnessed a recession marked by the stagnation of several industrial indicators between 1999 and 2004 (DEPF, 2006). The industrial activity of the region Doukala-Abda which is located near the Grand Casablanca region has benefited from the relaxation of this industrial region to position itself as the second industrial center of Morocco (9.7% of national production).

The region experienced significant growth in industrial activity and a marked improvement in the share of national exports is the Tangier-Tetouan. Indeed, the evolution of the structure of industrial production and exports by region between 1994 and 2004 shows a significant decline in the weight of the Grand Casablanca region and the emergence of the Tangier-Tetouan region whose share in the national production rose from 5.7% in 1999 to 7.8% in 2004, representing an annual growth rate of 9.7%.

Figure 3: Mapping of the evolution of the structure of industrial production and exports by region in Morocco between 1994 and 2004.



Source: Mapping software provided on the Sphinx, from data of DSFF.

ESEI: changes in the structure of industrial exports; **ESPI:** changes in the structure of industrial production.

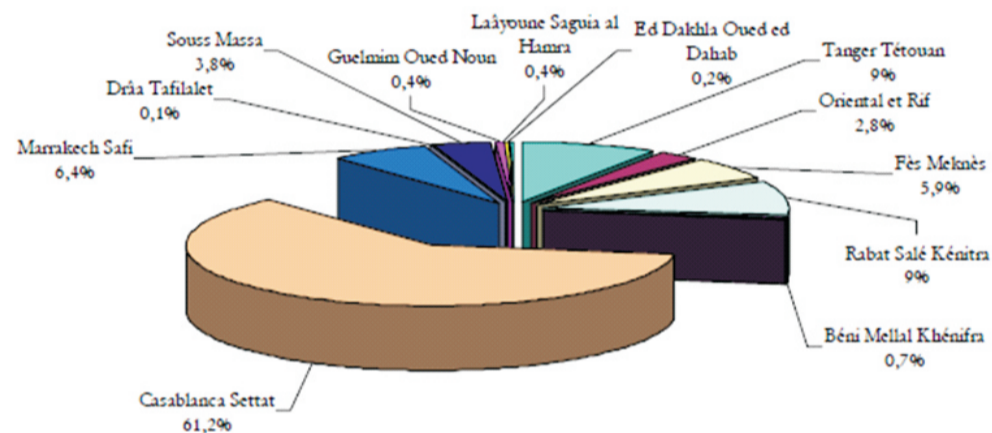
There is a saturation of the center and a reversal of the pattern "center-periphery" model to a new "center - new center - periphery". The region of Tangier-Tetouan which is in an intermediate situation is less advanced than the central region in terms of industrial concentration but it continues in a track higher than the rest of the country.

2.1.The industrial development :

The decline in the grand Casablanca region in industrial activity was accompanied by a decline in its share in domestic investment, which rose from 54% in 1994 to 38.4% in 2004. The development of regional industrial production Tanger-Tetouan is essentially due to the electrical and electronics industries, which despite their average contribution to the regional level (15.9%), achieve more importantly at the national level from 7.1% in 1994 to 28.8% in 2004 of total production in the sector. The Grand Casablanca has seen its share decline in this sector with a contribution from 85% in 1994 to 57.3% in 2004.

The Casablanca-Settat region achieved the largest average share of value added in manufacturing industry during the period 1998-2009, contributing up to 61.2% in the domestic value added of the sector. This position confirms the status of the region as the first industrial site in Morocco. However, the average annual growth of the sector in this region is equal to the national average (5.3%) reflecting signs of deterioration of its productive apparatus and also the transfer of this system to tertiary activities.

Figure 4: The average Structure of the added value of the transformation industry in the period 1998-2009

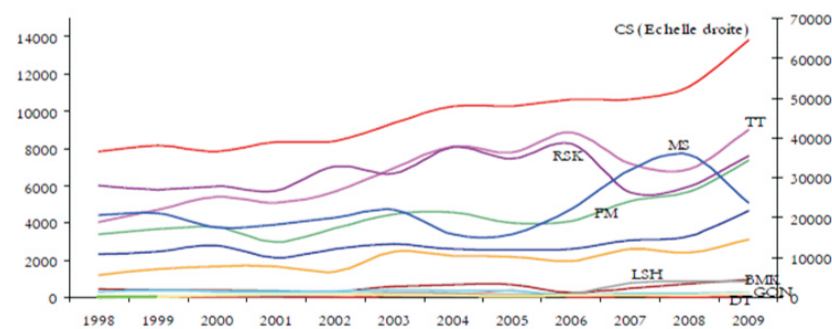


Source : Calculation Studies Branch and Financial Forecasts (DEPF, 2011).

Casablanca region is followed by Settat region, Tanger Tetouan and Rabat Salé Kenitra with a share in industrial value added 9% each. This confirms the emergence of the region of Tanger Tetouan as a new national economic hub centered around the Tanger-Med port which induces through its expansion the revitalisation of this area.

Indeed, the industrial added value in the region of Tanger Tetouan comes mainly from industries for export. It is made up of 24.8% by the clothing industry and fur, food industry 19.7% and 18.8% Industrial machinery and electrical appliances.

Figure 5: Evolution of the added values of the main regions in the processing industries in million Dirhams (1998-2009)



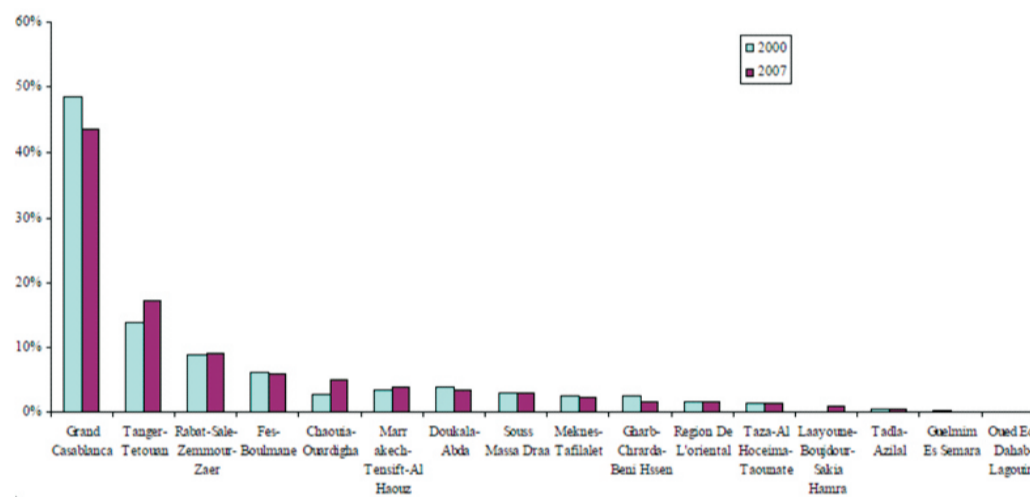
Source : DEPF, 2011.
 CS : Casablanca-Settat, TT : Tanger-Tétouan, RSK : Rabat-Salé-Kénitra.

The industrial development of the region Tangier-Tétouan is due to its proximity to Europe, the efforts of the authorities in terms of reception facilities and especially the opening of the region on the international trade. The creation of the EPZ has also promoted the growth of exports. Indeed, the share of exports in the region Tangier-Tétouan in national industrial exports rose by 8.2% in 1999 to 15% in 2004, representing an average annual increase of 17.7%. The region became the second largest exporter of Morocco, with 45.3% of exported production in 2004, 46.8% came from textiles and leather industries and 31% of electrical and electronic industries. The region has also enhanced its attractiveness as capital investment share rose from 6.1% in 1994 to 9.3% in 2004.

2.2. Employment IN THE INDUSTRIAL FIELD:

The analysis of the regional distribution of employment in the manufacturing industry reveals a significant disparity between regions. Thus, the region of Grand Casablanca alone absorbs an average of 2000-2007, 43.1% of jobs in this sector maintaining its historical notoriety as the first-place industrial, financial and commercial region (DEPF, 2009). Also, this region has experienced in 2007 the highest rate of industrialisation at the national level 38%. However, experienced region a slowdown from industrial employment compared to the national level with a loss of 5.06 points since 2000 to 43.64% in 2007.

Figure 6: Evolution of the structure of industrial employment by region.



Source: Ministry of Industry, Trade and New Technologies.

There are two regions namely Chaouia-Ouardigha and Tangier-Tetouan which are specialised in the manufacturing sector of electrical machines and apparatus, which performs a 9% of the share of the national industrial employment. These two regions strive in exports (export rate 62%), capturing alone 55% of employees in this sector, achieving 50% of its production and attracting 51% of the investment allocated to this sector in 2007 (DEPF, 2009). This emerging field is located in the region of Tangier-Tetouan, with the logistical support, it is considered as a new regional industrial center.

According to a survey of companies based in Tangier (Rabhi, 2008), the number of 40 foreign companies increased from 4877 in 2000 to 15,305 in 2004 (the effective textile - leather rose from 3092 to 6530 and the automotive sector increased from 300 to 5816 in the same period), which shows the emergence of a new specialisation in the automotive sector. However, the structure of the workforce by qualification, within the 36 foreign companies that responded to the question, confirms the predominance of unskilled workforce. The demand for unskilled labor can be explained not only by the strategies of firms in the international division of labor, but also by the lack of local skills.

In the context of these regional policies undertaken by the Moroccan government, the emergence of regional development center of Tangier-Tetouan is due to the great importance given to the proximity advantage to Europe through doubling efforts to ameliorate the hosting infrastructure and developing platforms for export. There is a saturation of the center of Casablanca and a reversal of the pattern "center-periphery" model to a new "center - new center - periphery". The area of ? ? Tangier is now a driving power

to Morocco as it generates agglomeration, the diversification of industrial activities, the emergence of new specialisations, increasing the rate of growth of investment and the exports, job creation and human capital training. The geographic concentration of industries attracts labor, which in turn causes a change in the regional GDP, development of basic services and therefore a higher standard of living. Our findings reinforce the idea that agglomeration and growth are mutually reinforcing each other (Fujita and Thisse, 2003).

However, the benefits can fully play their role as a growth factor only if the human capital comes to adopt foreign technologies transferred. Morocco has an interest in developing the learning skills to promote technological upgrading. Therefore, the country is gradually launching in more sophisticated industries that require high qualifications.

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