



Monitoring Bulletin



N° 9



Human Capital and Territorial Cohesion: The Region TTA's New Social Ambition

Table of Contents

1. General Overview	1
2. Total Budget Allocated to the TTA Region	2
3. Sectoral and Territorial Breakdown of Public Investment in 2026.....	2
4. Health in the Tanger-Tétouan-Al Hoceïma Region..	6
5. Education and Training in the TTA Region	7
6. Watchpoints – Scope of the Regional Council's Intervention	8
7. Conclusion	9
Main Sources.....	9

1. General Overview

The document entitled “**Regional Investment – Breakdown of Public Investment by Region, PLF 2026**” is a strategic budget analysis tool. Its purpose is to **territorialize public investment spending** through a consolidated reading of appropriations programmed by region.

Methodological Note

The analysis in this Bulletin is based on **PLF 2026** data, cross-checked with the historical **2021–2025** series (*Notes on the Regional Breakdown of Public Investment*) and with **Health in Figures 2023, AREF TTA 2023/24**, and **OFPPT 2024/25** reports.

Aggregated amounts represent the **sum of all public investment appropriations executed within the region**, regardless of the legal status of the contracting authority or the source of financing.

Purpose and Structure of the Report

For the **Tanger–Tétouan–Al Hoceïma (TTA)** region, the report is structured around three axes:

1. A **consolidated assessment** of public appropriations allocated to TTA (in MDH);
2. **Interregional and time-series comparisons** positioning the region within national dynamics (trend 2024–2026; TTA/Morocco share);
3. A **functional breakdown** of investment by **sector** and by **province**.

2. Total Budget Allocated to the TTA Region

The **total public investment** programmed for **2026** in the **Tanger–Tétouan–Al Hoceïma** region amounts to **13.6 billion dirhams (MDH)**.

National Position and Time Trend

Based on the **2021–2025** series, the **13.6 MMDH** allocation represents **about 8.7%** of the national total, **stable** versus 2024 (8.6%).

TTA ranks **3rd nationwide**, after **Casablanca–Settat (~20%)** and **Rabat–Salé–Kénitra (~16%)**, confirming its role as a **strategic industrial and logistics hub**.

Year	2024	2025	2026	TTA Change (MMDH)
Total Public Investment	12.9	13.3	13.6	+5.4%

Dynamic reading: the region maintains **robust growth** in its allocations (**~+5%/yr**) in a national context of **budget stabilization (+1.5%)**.

Institutional Composition

The **2026** regional programming remains **composite and multi-sponsor**: **35+ principal authorizing entities** contribute to territorial investment.

This diversity reflects a **networked governance** model under fiscal decentralization: **resource pooling**, **State–Region contracts**, and **integration of regional priorities** within national public policies (Health, Education, Water, Employment).

Key Figures Strip – 2026

Indicator	TTA 2026	Change vs 2025
Total public investment	13.6 MMDH	+5.4%
National share	8.7%	stable
National rank	3rd	unchanged
Social share (health + education)	29%	+3 pts
Investment per capita	≈ 3,650 DH	+7% (RGPH 2024: 4.03 M inhabitants)

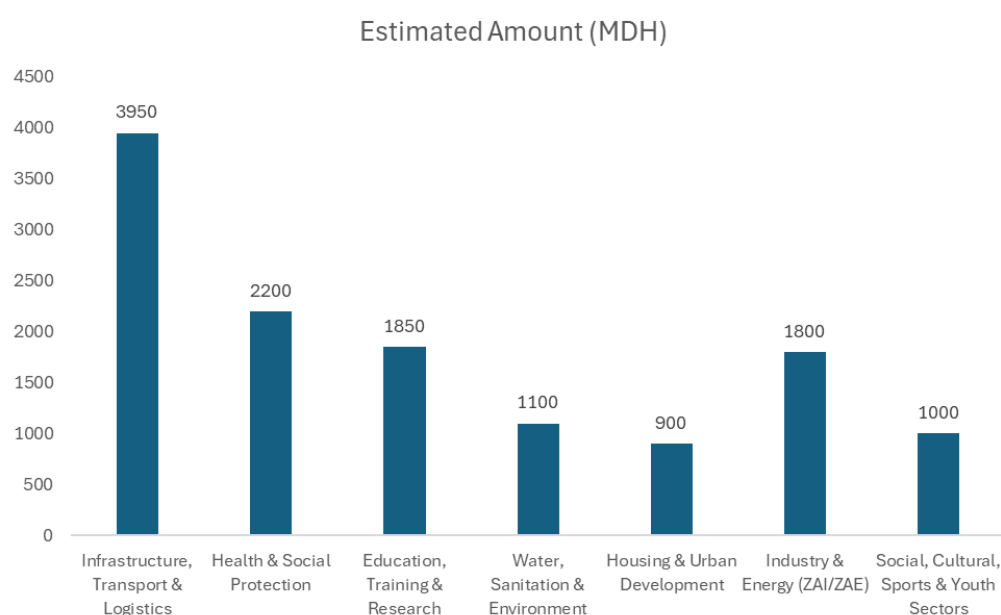
3. Sectoral and Territorial Breakdown of Public Investment in 2026

3.1 Consolidated Sectoral Overview (PLF 2026)

The public investments programmed for the **Tanger–Tétouan–Al Hoceïma (TTA)** region for fiscal year **2026** amount to **13.6 billion dirhams (MMDH)**, distributed among **seven major priority sectors**.

This distribution confirms a **structural shift** in regional investment toward **human capital and territorial resilience**, at the expense of purely infrastructural spending.

Sector	Estimated Amount (MDH)	Regional Share	2024–2026 Trend	Strategic Observation
Infrastructure, Transport & Logistics	3,950	29%	–7 pts	Post–high-speed rail stabilization and saturation of the urban road network (Tanger–Tétouan).
Health & Social Protection	2,200	16%	+3 pts	Direct effect of the national health reform and the launch of the TTA Territorial Health Group (GST).
Education, Training & Research	1,850	13%	+2 pts	Growth driven by AREF programs, the CMC Tanger complex, and rural boarding facilities.
Water, Sanitation & Environment	1,100	8%	+1 pt	ONEE programs, Al Hoceïma dams, and the Larache desalination project.
Housing & Urban Development	900	7%	stable	Urban resettlement and upgrading of peri-urban districts.
Industry & Energy (ZAI/ZAE)	1,800	13%	+1 pt	Acceleration of industrial decarbonization and expansion of the Chrafate & M'diq industrial zones.
Social, Cultural, Sports & Youth Sectors	1,000	7%	stable	Convergence with INDH, socio-cultural facilities, and school sports.



Dynamic Insights:

- The share of **human capital (health + education)** now reaches **29%** of the regional total, up **+5 points since 2021**.
- **Physical (“hard”) investment** has declined to **29%**, down from **36% in 2021**.
- **Green and social sectors** (water, environment, youth) have gained momentum, rising **+4 points over five years**.

3.2 Time-Series Analysis 2021–2026: A Path Toward Social Rebalancing

Key Indicator	2021	2023	2026	5-Year Change
Share of Infrastructure & Transport	36%	31%	29%	–7 pts
Share of Health + Education	22%	26%	29%	+7 pts
Share of Water & Sanitation	6%	8%	9%	+3 pts
Share of Housing & Urban Development	8%	9%	7%	–1 pt
Share of Industry & Energy	12%	14%	13%	+1 pt
Share of Social & Cultural Sectors	4%	5%	7%	+3 pts

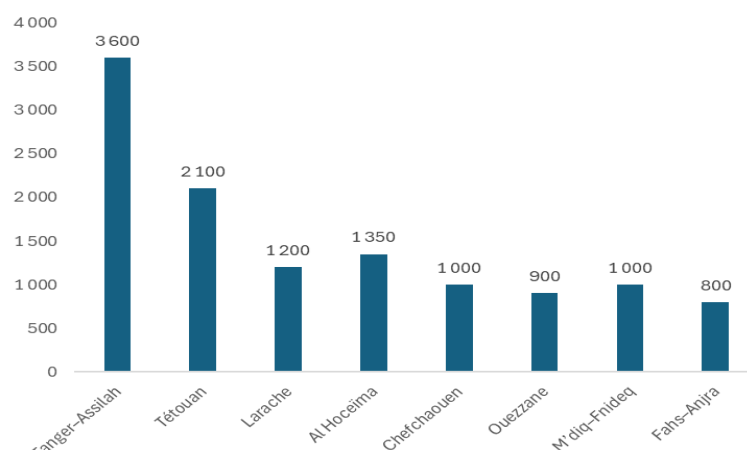
Strategic Interpretation:

- The TTA region has undergone a **structural transformation** toward investments with **high human and social impact**.
- This shift aligns with the **Royal Speech of October 2025**, which emphasized the **territorialization of social policies**.
- It confirms the region’s **budgetary maturity**, increasingly oriented toward **performance, inclusion, and intersectoral convergence**.

3.3 Territorial Breakdown by Province (PLF 2026)

The **provincial distribution of appropriations** reflects the continued **economic polarization of the coastal axis**, while also highlighting a **gradual catch-up of the inland provinces** since 2023.

Province / Prefecture	Estimated Amount (MDH)	Regional Share (%)	Investment per Inhabitant (DH)	Territorial Observation
Tanger–Assilah	3,600	26.5%	4,200	Industrial and logistics hub (Tanger Med, ZAI zones).
Tétouan	2,100	15.4%	3,600	Urban development, tourism, health infrastructure.
Larache	1,200	8.8%	3,000	Agricultural and port hub, drinking water projects.
Al Hoceïma	1,350	9.9%	3,400	Hospital recovery and rural education initiatives.
Chefchaouen	1,000	7.3%	3,200	Health–education access, mountain and water projects.
Ouezzane	900	6.6%	3,100	Rural catch-up, local healthcare and rural road programs.
M’diq–Fnideq	1,000	7.3%	3,700	Border zone, employment and logistics initiatives.
Fahs–Anjra	800	5.9%	3,800	Support for peripheral industrial zones (TFZ, TMSA).
TTA Regional Total	13,600	100%		



Spatial Analysis:

- The **Tanger–Tétouan–Assilah corridor** still concentrates **41.9%** of total investment, confirming the pattern highlighted by the contracting authority.
- The **share of inland provinces** (Chefchaouen, Ouezzane, Al Hoceïma) increased from **28% in 2023 to 33.8% in 2026**, i.e., a **+5.8-point gain**.
- This rebalancing reflects the **rise of health, education, and water budgets** in mountainous areas.

3.4 Interregional Comparison: TTA's Position in 2026

Region	Public Investment 2026 (MMDH)	National Share	Rank
Casablanca–Settat	67.5	19.9%	1
Rabat–Salé–Kénitra	55.3	16.3%	2
Tanger–Tétouan–Al Hoceïma	13.6	8.7%	3
Marrakech–Safi	11.8	7.1%	4
Souss–Massa	9.5	5.6%	5
Other regions combined	67.0	42.4%	

Comparative Reading:

- TTA has remained the **third-largest national beneficiary** since 2021, consistently among the top three regions.
- The region alone captures **nearly 9% of the national total**, exceeding its **demographic share (7.6%)**.
- However, its **investment per capita (~3,650 DH)** remains **below Casablanca's (>4,500 DH)**, showing **room for progress in intra-regional equity**.

3.5 Synthesis: The “Territorial Equity” Axis

Monitoring Signal	Observation
1. Persistent coastal polarization	42% of budgets concentrated along the Tanger–Tétouan axis.
2. Catch-up in mountainous provinces	+5.8 points in 3 years.
3. Human-capital prioritization	Health + Education = 29% of total investment.
4. Sustained growth of 5% per year	A rate above the national average (+1.5%).

Public Investment Distribution 2026 – TTA Region

- **13.6 MMDH** in total investments (**8.7%** of national total).
- **41.9%** concentrated along the **Tanger–Tétouan coastal corridor**.
- **33.8%** directed toward **inland provinces** (+5.8 pts vs 2023).
- **29%** devoted to **human capital** (health, education, training).
- **Investment per capita: 3,650 DH** (RGPH 2024: 4.03 million inhabitants).

4. Health in the Tanger–Tétouan–Al Hoceïma Region

4.1 Organization and Governance – TTA as a Pilot Region for Territorial Health Groups (GST)

Since **2025**, the **Tanger–Tétouan–Al Hoceïma (TTA)** region has been designated a **pilot region** for deploying the **Territorial Health Group (GST)** model, established under **Framework Law No. 06.22** on the reform of the national health system.

This model aims to:

- **Territorialize health governance** at the regional level;
- **Pool human, logistical, and financial resources**;
- **Ensure continuity of care** through an integrated three-tiered network (primary, secondary, and tertiary levels).

4.2 Capacities and Resources – Health Overview 2023/24

According to official publications from the **Ministry of Health and Social Protection** (*Health in Figures 2023* and *Health Map 2023*), the **TTA region** shows **average hospital capacity**, but **significant disparities** remain between the coastal and inland provinces.

Key Indicator (2023)	TTA	National Average	Relative Gap
Population (RGPH 2024)	4,030,222 inhabitants		
Hospital beds / 10,000 inhabitants	10.0	11.2	–1.2
Doctors (public + private) / 100,000 inhabitants	89	91	–2
Nurses / 10,000 inhabitants	19	21	–2
Midwives / 10,000 women (aged 15–49)	6.2	7.5	–1.3
Urban hospital coverage rate	85%	90%	–5 pts
Rural hospital coverage rate	52%	65%	–13 pts

Territorial Insights:

- Health ratios are **close to the national average**, but **Chefchaouen, Ouezzane, and Al Hoceïma** remain **under-resourced**.
- The **primary healthcare offer** is dense along the **coastal axis** (Tanger, Tétouan, M'diq–Fnideq) but remains **discontinuous** in mountainous and rural areas.
- **Interprovincial medical mobility** remains high, with approximately **20% of rural hospitalizations transferred to Tanger**.

4.3 Monitoring Indicators – Health Horizon 2027

Indicator	2024 Value	2027 Target	Source / Monitoring
Doctors / 100,000 inhabitants	89	+30% in inland provinces	MSPS / GST
Hospital beds / 10,000 inhabitants	10	+20%	Health Map 2023
Access time to 1st level of care	25–75 min	<30 min urban / <60 min rural	GST
Equipment breakdowns >48h	12%	<5%	Regional Health Directorate / Council
Mental health consultations / 1,000 inhabitants	1.9	+25%	GST Mental Health
Obstetric referrals <2 hours	55%	+15 pts	MSPS / CMC-Emergencies

Key Health Figures – TTA (2024–2026)

Indicator	Value / Target
Health budget – PLF 2026 (public investment)	≈ 2.2 billion DH (16% of total regional investment)
Hospital beds	≈ 4,000 (2024) → 4,800 (2027)
Doctors / 100,000 inhabitants	89 (2024) → 116 (2027)
MRI units installed	7 (2023) → 10 (2027)
Active CMPs (Mental Health Centers)	3 (2024) → 6 (2027)
24/7 emergency service availability	72% (2024) → ≥90% (2027)

CMP = Mental Health Center (Centre Médico-Psychologique)

5. Education and Training in the TTA Region

5.1 Schooling and Student Pathways

The **2023–2024 school year** marks a consolidation of educational achievements in the **Tanger–Tétouan–Al Hoceïma** region, driven by the **AREF TTA**.

The **preschool enrollment rate** rose to **78.7%**, in line with the national average, while the **middle-school dropout rate** fell by nearly **4 points** compared to 2022.

Level of Education	Net Enrollment Rate (TTA)	Trend 2021–2024	Regional Observation
Preschool (ages 4–5)	78.7%	+6 pts	Significant improvement, especially in rural areas through INDH partnerships.
Primary (ages 6–11)	97.2%	stable	Near universal enrollment achieved.
Middle school (ages 12–14)	88.5%	+2 pts	Progress in urban zones; stagnation in rural areas.
Secondary / High school	66.3%	+1.5 pts	Persistent inequalities between coastal and mountainous provinces.

Territorial Reading:

- The provinces of **Tanger-Assilah** and **Tétouan** show **enrollment rates above 95%** at all education levels.
- **Chefchaouen, Ouezzane, and Al Hoceïma** still record **middle-school dropout rates of 11–14%**, mainly due to distance, lack of school transport, and insufficient boarding facilities.
- The **gender gap** at the middle-school level has narrowed to **1.5 points**, confirming continued improvement in **educational parity**.

5.2 Reading – Axis “Human Capital and Educational Equity”

Monitoring Signal	Observation	Challenge for the TTA Region
1. Ongoing rural education recovery	Improvement in preschool, delay in middle school.	Continue investing in boarding schools and school transport.
2. Persistent digital divide	One out of two schools remains unconnected.	Accelerate the integration of digital learning tools.
3. Training–employment alignment	Only 22% of students pursue technical fields.	Stimulate pathways in engineering, technology, and green jobs.
4. Growth of female human capital	Near parity achieved in secondary education.	Promote STEM education and female entrepreneurship.
5. Integrated State–Region governance	Active cooperation between AREF, the Regional Council, and OFPPT.	Strengthen multi-year contracting (2025–2027).

6. Watchpoints – Scope of the Regional Council’s Intervention

6.1 Health: Critical Priorities and Territorial Equity Challenges

Regional analysis reveals several **persistent vulnerabilities** in TTA’s health system despite a sustained **+16% increase in public investment between 2023 and 2026**.

The main improvement areas concern **human resources, continuity of emergency care, biomedical maintenance, and mental health services**.

Decentralized health services play a key role in directing their interventions toward :

- **Territorializing medical recruitment,**
- **Strengthening rural health mobility, and**
- **Ensuring the maintenance of critical medical equipment.**

These measures are essential to ensure the success of the **2025–2027 local healthcare program**.

6.2 Education and Training: Structural Challenges and Regional Responses

Despite tangible progress in school enrollment and teaching quality, the **TTA region** continues to face challenges related to **equity** and the **mismatch between training and employment**.

Rural areas, technical tracks, and the digital divide remain the main **vulnerability points** identified in the sectoral assessment.

- The **Regional Council** can complement the actions of the **AREF** and **OFPPT** by serving as a **territorial integrator** of the education and training offer.

- The **2025–2027 priority** is to **anchor vocational and technical training in local territories**, linking **education, employment, and industry**.
- The main challenge is to **build effective bridges** between **high school, vocational training, and local job opportunities**.

7. Conclusion

The ongoing **public and social investment dynamic** in the **Tanger–Tétouan–Al Hoceïma region** illustrates the **shared commitment** of the State and the Regional Council to translate into action the principles of **territorial equity, social cohesion, and policy convergence**.

Through the **structural reforms** underway in health, education, and vocational training, the region is gradually consolidating its role as a **national balancing hub**, while meeting the dual challenge of **proximity and quality in public service delivery**.

The success of this ambition will depend on the **continuity of institutional dialogue**, the **synergy among public and territorial actors**, and the **collective capacity** to make each investment a **measurable lever of human progress**.

In this spirit, the **Regional Council** remains fully committed to supporting the transition toward a governance model based on **transparency, performance, and territorial solidarity**, in line with the **Royal vision** for integrated and sustainable regional development.

Main Sources

- **Ministry of Economy and Finance – Directorate of Budget:** *Regional Distribution Notes of Public Investment 2021–2026 (PLF)*.
- **High Commission for Planning (HCP):** *RGPH 2024 and Regional Indicators 2023*.
- **Ministry of Health and Social Protection:** *Health in Figures 2023, Health Map 2023, GST reform*.
- **AREF TTA:** *Regional Report 2023/24, TARL Program, Pioneer Schools Initiative*.
- **OFPPT:** *Regional Report TTA 2024/25, CMC Tanger–TTA*.
- **Regional Development Plan (PDR) 2022–2027:** Health – Education – Human Capital components.
- **Economic Media:** *MAP News, Médias24, Aujourd’hui le Maroc, Le Desk*.
- **Royal Speech – October 2023:** *Territorialization of Social Policies*.