

New touristic centres in peripheral regions of the Maghreb. Their development and economic importance in Tunisia and Morocco

Andreas Kagermeier, University of Paderborn, Germany

Summary

The contribution investigates the role that state-initiated development of tourism in peripheral regions has on the economic stabilization of such regions, taking as examples two new tourism destinations; the Tabarka region in north-west Tunisia, which concentrates primarily on beach tourism, and the Ouarzazate region in pre-Saharan Morocco. Empirical data show that it has been possible to induce perceptible job market effects in both of these areas. The development of linkage effects in either area is, however, more limited. The development concept applied, being heavily biased toward the private economic sector, is in this respect perhaps not the best, but a long line of other developmental deficits, also outlined, reduce the economic efficiency of the development projects.

1 Introduction

Aside from the primary motives of encouraging foreign cash income and creating jobs, the development of tourist destinations in countries outside OECD is often coupled with the expectation that economic impulses can be thus introduced into peripheral areas. Both Morocco and Tunisia as nations are relatively well-suited to such a strategy, being well-established as tourist destinations, and so a re-direction of the tourist flow into new destinations within both countries can make use of and build on foundations and infrastructures already present.

In addition to the expansion of desert tourism in the area of Touzeur in Tunisia, there has been an attempt in the last few years with the large tourism project *Tabarka* to develop a complex which is comparable in size to the beach tourism centres hitherto present. The expansion of tourism destinations in Morocco is primarily focused on the pre-Saharan south of the country, with the Ouarzazate region forming the centre of the area to be developed.

The demands made of a branch of the economy in a peripheral region are not simply aimed at the direct effects it brings with it but the projects initiated should, as PERROUX (1955) assumed, function as growth poles via the formation of forward and backward linkages. As a result of these indirect effects, the efficiency of the input is increased. However, the efficacy of the linkage effects hoped for in state industrialisation policy has often proved itself to be limited in scope. We may also assume that regional economic integration occurs only partially in the initial phase of a tourism project. VORLAUFER (1996; see fig. 1) presupposes that the core economic region of the country will first of all benefit from the creation of a tourism development project or – according to the development level of the economy as a whole of the respective nation – integrative relationships with abroad will be formed on a larger scale. The reason for this is that the regional economy of peripheral regions is frequently lacking in the factors that are necessary for the development of integrative relationships (capital, skills, production capacity). As the integrative relationships grow largely in the direction of the core

economic region of the country in the initial phase of a tourism development project as well, VORLAUFER presumes that the later (maturing) phases will witness a gradual substitution of the external integration by relationships inside the region.

As a result, two aspects must be considered when evaluating tourism development projects:

- 1) to what degree the projects can be seen as viable and successful from a business management point of view, and
- 2) to what degree have the projects evolved regional economic integration, or to what degree are links to regional activities present and participation by the local and regional protagonists visible.

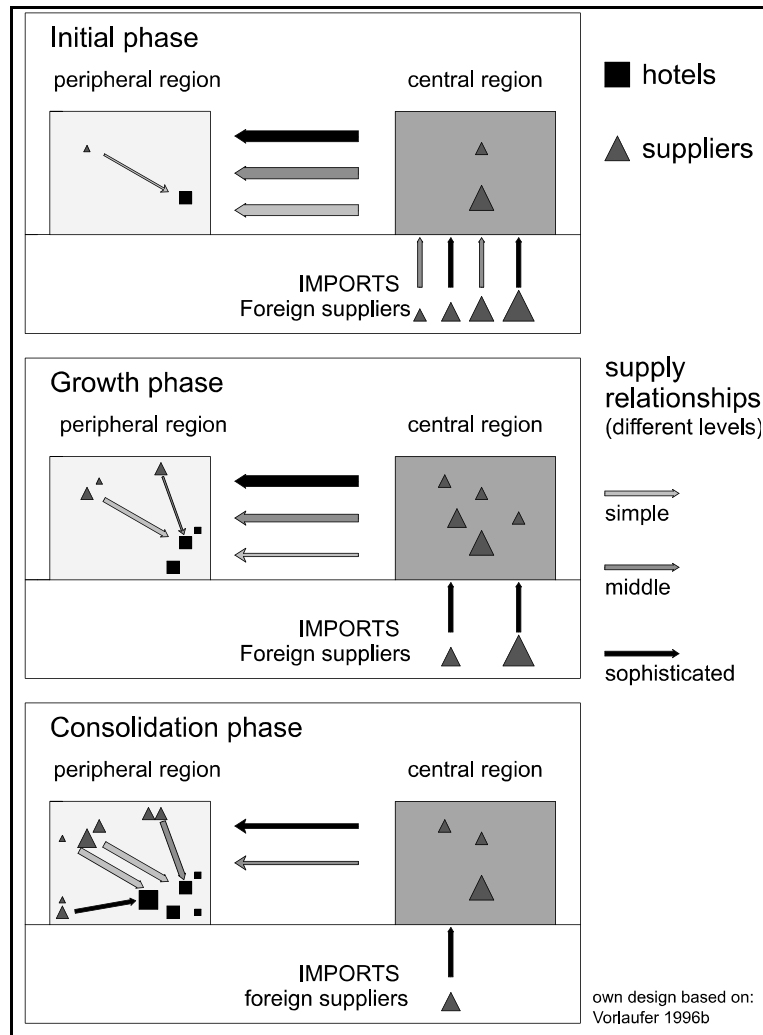


Fig. 1: Diagram of formation of backward linkage effects in development of tourism in peripheral regions

2 Ouarzazate and Tabarka as new tourism destinations

Ouarzazate and Tabarka will be used as example projects during the investigation of the degree to which, some 10 years after the start of the projects, private sector activities have responded to the impulse given by the investment in tourism. This involved

- 1) checking the degree to which the local economic activities show direct links to tourism
- 2) estimating the direct effects on the local job market and
- 3) analysing the degree of involvement of local and regional participants in the tourism and para-tourism fields. In addition
- 4) the effects in adjacent economic fields is examined.

Both areas examined in this study experienced a considerable growth in accommodation capacity. In Ouarzazate it grew by approximately 3,300 beds and in Tabarka by a good 2,500, and thus a comparable basis exists on which to investigate tourism-oriented commercial activities. However, the delay in starting the project in Tabarka meant that the majority of the bed

capacity was created in the early 90s, whereas building began in the mid-80s in Ouarzazate (see fig. 2).

The hotels built in Ouarzazate are aimed at high-end tourists (see fig. 3). Over 80% of the beds are in expensive luxury hotels. It was originally planned that Tabarka should also appeal to the high end of the market in line with the intended diversification of the Tunisian tourism industry. Tabarka was to counter the cliché of value-for-money Tunisian mass tourism, and appeal to new target groups at the same time. It was planned to extend the season by expanding not only beach tourism but also golf, hunting and hiking (cf. *Société d'Aménagement et de Développement Touristique de Tabarka* n.d.; *Office national du Tourisme tunisien* 1979)

Contrary to the original concept, the last few years have seen the construction in Tabarka of hotels mostly in the medium price range, or holiday clubs (V.V.T. = *villages de vacances touristiques* in fig. 3) which are comparable to 3 star hotels in terms of level. However, this has made the hotels affordable for a group who were barely considered during the original planning, namely the Tunisian middle classes. As a result, more than a third of overnight stays in 1996 were Tunisian, while only 7% of the guests in classified hotels in Ouarzazate were Moroccan.

The growth of hotels in Ouarzazate has however not been accompanied by a corresponding rise in demand and particularly the goal of attracting guests for longer stays has remained largely unfulfilled, the average stay being only 1.6 nights in 1996. Accordingly the province of Ouarzazate was on average at only 25 % of the average annual capacity in 1996, compared to a level of about 40% in Morocco as a whole and even over 50% in Agadir. As an interim summary with regard to the Moroccan case study, it can be said that the state-funded development of tourism has led to a considerable increase in accommodation capacity but that this has not been accompanied by a comparable increase in demand.

The climatic conditions in northern Tunisia mean that Tabarka is fundamentally disadvantaged in comparison with other Tunisian resorts as beach tourism is viable only in the summer months. As a result there was an average of just over 30% of the annual average capacity in 1996, considerably lower than the value of 48% for Tunisia as a whole. The aim of achieving a

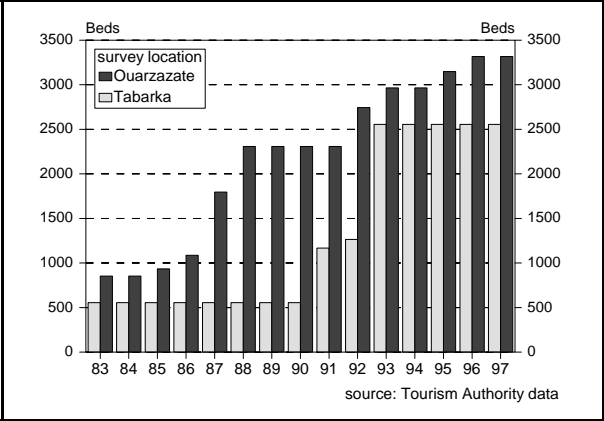


Fig. 2: Development of accomodation capacity

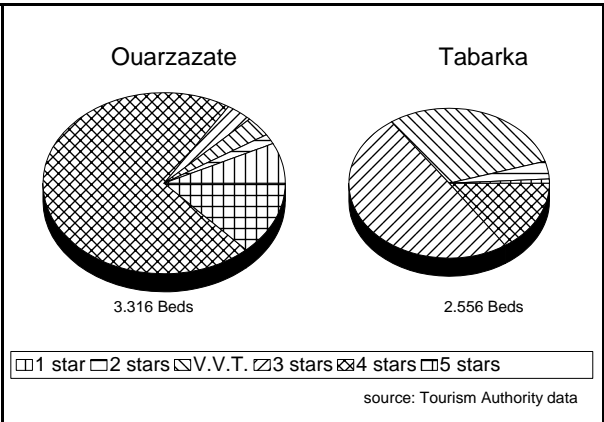


Fig. 3: Number of beds by hotel class

more even distribution throughout the year with the help of additional activities (golf, hunting) has been only partially achieved.

The projects in both case study areas were initiated by the state but not carefully monitored when they were being put into practice. In Ouarzazate the public role was largely restricted to the provision of appropriate land. Aside from the founding of a college of hotel management and the extension of electricity, water and road infrastructures, there have as of yet been hardly any additional measures taken by the public sector. In Tabarka, a private development company took over the developer role from the state under favourable conditions and it has been mainly interested in the marketing of land, and concerned to a lesser degree with playing a supportive role in further developments of the destination. The low levels of occupancy mean that we can already suspect that deficits have occurred in the realisation process.

3 Economic effects of tourism development

A survey of commercial enterprises in the town of Ouarzazate and in Tabarka was carried out in 1997 in order to investigate the economic effects of tourism development. A total of 413 interviews were conducted with the owners of business enterprises in Ouarzazate. In Tabarka all 385 enterprises in the town were included in the survey.

The survey included the enterprise owner's opinion of what proportion of their customers were tourists. A percentage of more than 5% tourism business was mentioned by only some of the owners in both towns (see . 4). Whereas only a bare third of the enterprises in Ouarzazate profit directly from tourism, almost half do in Tabarka. The difference is largely based on the fact that about a third of overnight guests in Tabarka are tunesian tourists and the local enterprises benefit more from these than from European tourists.

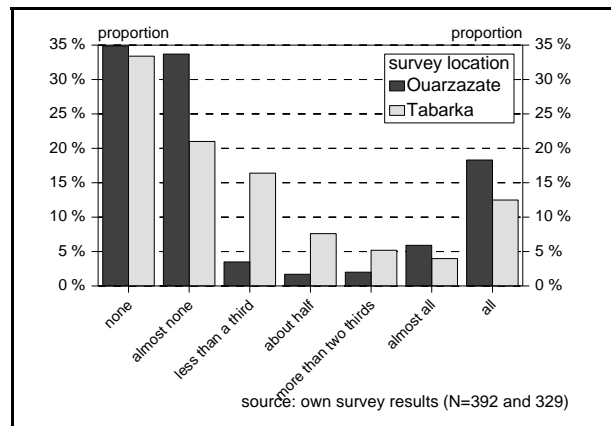


Fig. 4: Proportion of tourist trade in surveyed enterprises

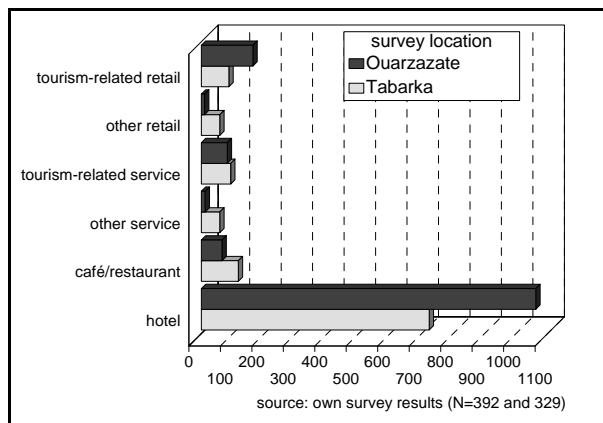


Fig. 5: Tourism-related jobs by sector

In order to investigate the effect of tourism on the job situation in both case study areas, the percentage of tourist business was compared to the number of employees in each enterprise. For example, with a direct effect, an enterprise with two employees and a tourist business of 50% would have 1 job. The result of this calculation is shown in figure 5. Looked at purely mathematically, this results in a total of almost 1,400 and 1,100 jobs directly resulting from tourism activities in

Ouarzazate and Tabarka respectively. However, the great majority of jobs directly related to tourism arose in the accommodation sector whereas the employment effect for businesses not exclusively dependent on tourism was extremely small, especially in Ouarzazate. Nevertheless it should be noted that marked positive economic impulses result from the direct employment effects in both sample localities.

Apart from the commercial enterprises whose products are marketed directly to tourists we took into account those enterprises whose products pass through an intermediary before they are offered for tourists' consumption or use. These include;

- 1) especially production of souvenirs in the region and
- 2) the production of foodstuffs.
- 3) those services which are required after the construction phase for the maintenance of hotels and other tourism facilities,
- 4) the indirect employment effect based on the demand by people working in the tourism industry itself for goods and services in the region.

Without being able to go into a detailed analysis of individual results at this point, it can be said that relatively low factors of multiplication could be discerned among the indirect effects of tourism development. So, for example, only a small proportion of the goods on offer in souvenir and handicraft shops comes from the region in question, the majority originating in the large handicraft centres of the country and other tourist regions. Although the nation-wide integration of souvenir production means that the employment effect directly attributable to sales in Ouarzazate and Tabarka cannot be stated exactly, there are about 100 people employed in Ouarzazate in the general production of souvenirs and handicraft articles and a maximum of 200 in Tabarka region.

Because agriculture is carried out only to a small degree in both regions, supply of foodstuffs to the hotels relies heavily on produce from each country's main agrarian regions, and so the employment effect in this field is extremely small. Neither have any enterprises specialising in technical services for the hotels (e.g. air conditioning, electrical systems) moved into the area. The reason for this is that simple service and repair tasks are carried out by the hotels' in-house technicians while specialists still travel in from outside the region for the more difficult tasks. However, a range of craftsmen do receive contracts from the hotels, restaurants and tourist bazaars (e.g. for the manufacture or repair of furniture). Apart from the construction of the hotels themselves, which was largely achieved with temporary labour from the region and for which several large local builders merchants were able to supply the materials, no notable employment effects are to be found in this field either.

The survey also asked the enterprise owners to estimate how many of their local customers were employed in tourism. Even if these figures are not very precise they permit the employment effect in each region to be estimated as about 300 jobs. Although the number of jobs created by indirect effects as a whole is difficult to calculate as precisely as in those fields directly dependent on tourism, we can say as a summary that there have been few integrative rela-

tionships formed as yet. There is probably a maximum of 700 jobs in total in both case study areas; in other words, as a loose generalisation, we could say that for every two jobs in the tourism branch, there is another one created by linkage effects. This means that the officially estimated indirect employment effects have clearly failed to materialise, or at least not in the region. The Moroccan estimate of the indirect employment effect was 1.78 per hotel bed, the Tunisian 1.12. (c.f. e.g. *Royaume du Maroc* 1979, p. 76, 1993, p. 23 and *Republique Tunisienne* 1997, p. 11) Even if a certain proportion of the employment effect is not operative in the tourism region because some of the products and services are produced or performed respectively in other parts of the country, the regional effectiveness of the development of tourism is still very low in both examples studied.

4 Estimation of the consequences of tourism among the population

This paper has thus far been able to show that the objectively measurable effects of tourism development on both the national and regional levels represent an important economic factor in both Morocco and Tunisia. However, the significance of the purely economic viewpoint would clearly have to be qualified should clear reservations regarding tourism development become apparent among the local population. Even though this aspect can be dealt with less than comprehensively by this project, it should not be completely ignored.

The survey questioned traders about possible positive and negative effects of the development of tourism, asking them to give their opinion on whether such effects were present in Ouarzazate or Tabarka. The results of these questions in both places are shown in figure 6 in the form of mean values. The mean values for each statement are shown, differentiated according to informant with or without significant income from tourism. Overall, it emerges that the overwhelming majority of informants in both case study areas are in accordance with the arguments in favour of tourism development frequently mentioned in books and articles, namely that it is a significant source of income and creates jobs.

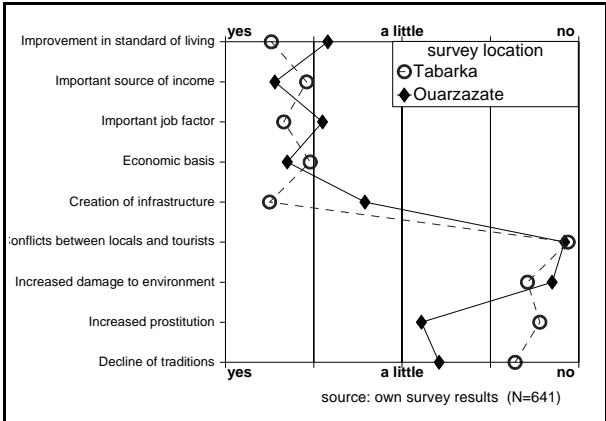


Fig. 6: Mean estimation of effects of the development of tourism

The effect that development of tourism has on infrastructure was also judged very positively, although it was considerably more strongly felt in Tabarka than in Ouarzazate. This difference reflects the concrete differences between the two localities in the level of infrastructure development resulting from development of tourism (for more details see KAGERMEIER 1999).

The existence of conflicts between tourists and locals is universally denied, and the statement that the environment is increasingly damaged as a result of tourism was virtually unani-

mously rejected. In fact, in conversation it was frequently mentioned that quite the opposite was the case, that tourists might make the local authorities apply stricter standards with regard to the environment.

More marked differences between the Moroccan and Tunisian cases revealed themselves in the analysis of the effects of tourism in the socio-cultural sphere. Although some informants in Tabarka (especially older ones) did mention a loss of tradition, customs and practices and an increase in prostitution, these effects tended to be rated in the mean as slight. In contrast, informants in Ouarzazate discern these signs of degradation much more clearly. However, as the intensity of tourism, expressed as the relation of numbers of tourists to the number of local inhabitants, is much lower in Ouarzazate, a larger quantity of tourists cannot be the cause of this difference.

It is possible that the high proportion of internal tourists in Tabarka contributes to a greater acceptance of tourism *per se*; with over a third of officially registered overnight visitors (plus those in private quarters which are impossible to ascertain with any precision) being Tunisian, it is probable that tourism is much less seen as something alien.

It might be anticipated that those informants who profited directly from tourism would tend to emphasise the positive effects and to play down the negative. However, only minimal differences manifested themselves between the sample surveys in both case study areas (see KAGERMEIER 1999).

However, despite all the positive assessments of the value of tourism development, this was qualified in a number of intensive non-standardised interviews when the informant expressed the opinion that a higher material standard of living should not necessarily be equated with a better quality of life and that contact with tourists can sometimes have a negative effect on self-esteem. An analysis of this aspect would have overstepped the limits of a primarily economic geography-oriented study, however, and so was not taken any further. The aim of this element in the study was to investigate whether serious fundamental objections to the development of tourism were to be found, as these would have grave consequences for its further development.

5 Concluding Summary

Noteworthy partial successes were achieved in the development of tourist destinations in Morocco and Tunisia. The substantial expansion of the accommodation capacity has created a significant number of jobs in the region, and these have been largely filled by labour from the region.

However, the development of tourism in peripheral regions is by definition not self-reliant. A planned development therefore requires intensive regulation and management from outside. A limitation on the supply of land and financial inducements nation-wide alone will not suffice.

This study identified in the two cases presented a range of factors which reduce the effectiveness of tourism as a means in the development of a region:

- 1) **Mis-estimation of international demand:** The feasibility studies for both projects were only very superficially carried out, and for this reason international demand potential was wrongly estimated. The large majority of the hotels built in Ouarzazate in the last few years have been in the 4 or 5 star categories, are directed at a comfort-orientated foreign clientele and are only partially suited to the adventure and experience tourism that has grown up in the region in the last few years. The accommodation in Tabarka was also originally aimed at a mostly foreign clientele but is affordable for the local middle and upper classes because of the lower prices.
- 2) **Neglect of local demand:** Because the expansion of tourism in Morocco and Tunisia was motivated by the foreign currency that can be earned, both projects failed to take into consideration and plan for the local demand which should not be neglected when focusing on the development of peripheral regions. Whilst Tunisian customers also are able to take advantage of what is on offer in Tabarka without any great problems, the standard of the hotels in Ouarzazate means that it is only to a certain degree possible to appeal belatedly to internal tourism.
- 3) **Inadequate involvement of foreign investors:** Although the involvement of foreign investors is linked to problems of profit creaming, they may have a positive role to play, especially in the initial phase up to take-off, on the one hand, due to their access to the market and, on the other because international private sector economic involvement can send out positive signals to national investors. Whilst Morocco has taken a sceptical stance toward foreign investors in the past, the Tunisian example illustrates that international involvement in the development of tourism in peripheral regions does not happen of its own accord.
- 4) **Scant support of regional investment potential:** However, the promotion of investment from outside the region works against attracting investment from within the region. Private developers, such as the one active in Tabarka, find it difficult to strike a balance between raising extra-regional investment and stimulating regional involvement because they are mainly interested in the overall commercial success of the project.
- 5) **Insufficient marketing:** Aside from the role, already mentioned, that international tour operators can play in mobilising demand, all other marketing and advertising activities of course influence the scale of demand. The state promotes the entire country as a tourist destination and is only incidentally concerned with the individual regions, and, even though some attempts at more directly regional marketing are discernible in both case study areas, these activities have thus far been very limited in scope. That both extra-regional and small local investors have shown little interest in being involved in these activities has proved, however, to be a handicap, and so the local authorities are left to take on an active role in marketing the region. And, although they do indeed recognise the value of such activity, local officials have been reluctant and hesitant in taking on the work necessary.

The planning and execution of tourism development projects make considerable demands on the co-ordinating institutions, particularly with reference to the involvement of regional potential when there is a fundamental conflict between the need for stimulative and regulative intervention, and compensatory elements. This should not be understood in any way as an argument for the dominance of the state in such matters; it is important to find a balance between state and private sector protagonists in which both partners operate together in partnership. The lack of a central – ideally neutral – mediator to manage and oversee the entire project, from the planning stages, via execution and continual assessment, up to and including the marketing of the resort led, at least in both the regions examined in this study, to less than ideal results in the development of tourism destinations in peripheral regions.

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