



## Analysis of tourism policy in a developing country: the case of Morocco

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### ABSTRACT

The strong growth of mass tourism since 1950 has made this industry one of the most important in the world. Many national governments have thus implemented policies aimed at generating income from tourism. This research analyses the evolution of the Moroccan tourism policy and various development strategies carried out by the government over the last 60 years. Moroccan policy managed to position the country as the top tourist destination in Africa in 2014. This study assesses public policies to demonstrate the important role played by the state in this growth process. It analyses the main tourism plans implemented by the Moroccan government, and proposes a discussion around the current tourism development model linked to international investment.

### RESUMEN

El fuerte crecimiento del turismo de masas desde 1950 ha hecho que esta industria sea una de las más importantes del mundo. Muchos gobiernos han implantado políticas orientadas a generar ingresos derivados del turismo. Esta investigación analiza la evolución de la política marroquí de turismo y las diversas estrategias de desarrollo llevadas a cabo por el gobierno en los últimos 60 años. La política marroquí ha logrado posicionar al país como el principal destino turístico de África en 2014. Este estudio evalúa las políticas públicas para demostrar el importante papel desempeñado por el Estado en este proceso de crecimiento. Se analizan los principales planes de turismo creados por el gobierno marroquí, y se propone un debate sobre el actual modelo de desarrollo turístico vinculado a la inversión internacional.

### RÉSUMÉ

La forte croissance du tourisme de masse depuis 1950 a fait de cette industrie un des plus importants dans le monde. De nombreux gouvernements ont mis en œuvre des politiques visant à générer des recettes touristiques. Cette recherche analyse l'évolution de la politique touristique marocaine et les différentes stratégies de développement menées par le gouvernement au cours des 60 dernières années. La politique marocaine a réussi à positionner le pays comme la principale destination touristique en Afrique en 2014. Cette étude évalue les politiques publiques pour démontrer le rôle important joué par l'Etat dans ce processus de croissance.

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### 关键词

旅游政策; 发展; 国家; 摩洛哥

les plans touristiques principaux créés par le gouvernement marocain sont analysées, et une discussion sur le modèle actuel de développement du tourisme lié à l'investissement international est proposé.

#### 摘要

1950年以来随着大众旅游的强劲增长,使旅游业成为世界上最重要的行业之一。因此,许多国家政府颁布了旨在旅游业创收的相关政策。这项研究分析了摩洛哥旅游政策的演变以及政府过去60年来的各种发展战略方针。在2014年,摩洛哥因其积极的旅游政策使其成为非洲最重要的旅游目的地。通过研究中对公共政策和摩洛哥政府实施的主要旅游计划的评估,以确定国家在这一增长过程中所发挥的重要作用,以及讨论在当前旅游业发展中所涉及的相关国际性投资。

## Introduction

This study analyses the evolution of Moroccan tourism policy, which has gone from being a secondary factor in the country's economic development to playing a dominant role in recent years. Since 1999, tourism has received a major boost with the reign of Mohammed VI, underpinned by large-scale development plans (Vision 2010 and 2020) and measures to attract investment (Shamamba, 2005), so that the tourism sector has become the main factor of economic growth. Tourism currently plays an important role in the Moroccan economy. From 2010 to 2014, the income generated from international tourism totalled around 6.5% of the GDP (CIA, 2015; UNWTO, 2014). In 2015, Morocco, with 10.2 million tourists, was Africa's most popular destination and had the second highest tourist income after South Africa (UNWTO, 2016). These figures are the result of strong growth in the last 10 years. Steady growth has been maintained despite the recent political turmoil affecting other tourism-orientated countries in North Africa, particularly Tunisia and Egypt (the latter has traditionally been Africa's foremost tourist destination).

This study should be understood as an analysis of public policy, which in this case is tourism. The creation and promotion of public policy is closely related to the role played by government, the Moroccan state. There is no consensus agreement on the concept of public policy. Some authors understand public policy as a loose political phenomenon (Dye, 1992, p. 2), others conceive as a political instrument (Anderson, 1984, p. 3) and other authors define policy based on stakeholders (Jenkins, 1978, p. 15). Fenna (2004) proposes a classification of public policies based on the themes and objectives towards which policies are directed. This author highlights (i) policies related to production, focused towards increasing economic activity and living standards of the population; (ii) policies related to the distribution of wealth and opportunity of access; (iii) policies related to the consumption of goods, services and resources with a close relationship with the environment; (iv) policies related to the identity and citizenship and finally, (v) reflective policies that explain the processes of implementing policies and their regulation and control. The analysis presented would be closer to the first type of policies. Generally, when describing the components of public policies, most of the authors agree about emphasising the role of government agencies, the existence of

objectives and problems, the context or environment in which policy is developed, the actors, the creation of instruments and the effects (Anderson, 1984; Considine, 2005; Dye, 1992; Hall, 2008; Pal, 1992; Scott, 2011; Velásquez, 2009).

Morocco's tourism policy is in keeping with numerous studies which highlight the notable intervention of states in the development of tourism policy and its close links to the economic development process (Goeldner & Ritchie, 2012; Hall, 2010; Hall & JenKins, 1995; Matthews & Richter, 1991; Monfort, 2000; Schenkel & Almeida, 2015; Velasco, 2011). The strong growth in tourism has generated clear interest from national and local governments, and even international organisations, which consider tourism an essential opportunity for economic growth. Given an increasingly competitive and globalised international economy, tourism is presented as one of the few economic activities that can be carried out in developing countries. The governments of developing countries have few opportunities to generate incomes (Lea, 2006).

In addition to its obvious connection with the private sector, tourism involves various elements of a public nature, directly and indirectly associated with theoretical and practical aspects of policy. Nevertheless, tourism policy analyses have been more concerned with highlighting the achievements of economic and tourism policies (Jenkins, 1980; Williams & Shaw, 1988) than with territorial and social imbalances (Lea, 2006). The limitations of tourism to produce development remain in background, while governments emphasise the positive side of tourism to produce economic growth (Lamb, 1998). Some authors suggest that tourism has a limited capacity to produce development in developing countries (Britton, 1982) and that the income gap between the developed countries and developing countries tends to be maintained (Blázquez, Cañada, & Murray, 2011).

Research into tourism policy has centred on specific countries, as part of their national policy (Lickorish, 1991). Achieving socioeconomic development through tourism depends on a variety of elements and situations beyond the control of the industry itself. A wide variety of factors play a key role in this process, the economic, social, political, geographic and technological context, or the environment in which the tourism develops. Most studies agree that a country's level of development, its geographical size, the rate of growth of tourism, the degree of social adaptation to change, state intervention and the existence of tourism planning are major factors in determining the level of development and economic growth (De Kadt, 1979; Pablo-Romero & Molina, 2013; Pearce, 1991).

This study highlights the importance acquired by the tourism sector as a government instrument for the insertion of a developing country into the capitalist system. An analysis of Morocco suggests that tourism policy becomes a key area in which national development strategies converge. In this context, tourism policy becomes an instrument for supporting the political structure of both the monarchy, and the political and economic elite (The *Madjen*).

## Objectives and methodology

The objective of this research is to study the phases of the Moroccan tourism policy, and to identify the role that the Moroccan government has played in the recent development of the national economy. The study describes the main functions that tourism plays in the developmental stages of tourism policy with reference to models of economic and tourist production: pre-Fordist, Fordist and post-Fordist. An analysis of national policy

is thus made, taking into account the interdependence between internal structures and international economic and political relations (Gourevitch, 2011).

The tourism sector is closely connected with the processes of accumulation and production of capitalism (Dunford, 1990; Enríquez, Osorio, Castillo, & Arellano, 2012; Fayos-Solá, 1996; Garay & Cánoves, 2011; Go & Pine, 1995; Hjalager, 2007; Ioannides & Debbage, 1997). Pre-Fordist is linked to production processes artisans low-tech, and largely came about before the industrial revolution. In tourism, pre-Fordist is manifested by family businesses (such as a small family hotel), limited marketing and the promotion of tourism based on direct tourist information. Fordist is characterised by the mass production of standardised goods and services, to reduce their unit production costs. It is these principles that led to mass tourism, a phenomenon created by the major airlines, hotel chains and tour operators. Finally, post-Fordist, also known as the model of flexible accumulation, is an industrial mode of production that affects the flexibility of production and labour. Post-Fordist tourism seeks the segmentation of supply, compared to the transverse mass tourism offer, and the massive use of new technologies to expand tourism globally (Donaire, 1998). Since the 1990s, tourism in partnership with financial and real-estate capital has generated a large increase in tourism globally, so that there is no land or maritime space that does not have tourism potential.

Economic and other social sciences have frequently used in their studies the chronological distribution of production and accumulation cycles of Capitalism with reference to the pre-Fordist, Fordist and post-Fordist phases (Albritton, Itoh, Westra, & Zuege, 2001; Ash, 2000). The main variable used to identify the temporal phases of tourism policy of Morocco is the tourism demand (number of tourists) (Figure 3). The temporal evolution of this variable helped to classify the phases. The analysis of the objectives and the public and private investment of the tourist plans is the information that has been taken into account to determine the tourist phases. Likewise, the major political decisions and historical variables contained in the summary tables of tourism policy provided guidance to describe the stages of tourism policy of Morocco (Tables 1, 2 and 4). The data are secondary and come from the statistical sources provided by tourism agencies and from the analysis of the primary historical and political documents.

The specific aims of this study are: first, to analyse the phases of Morocco's tourism policy (Figure 3); second, to identify the role that the Moroccan government has played in the recent process of national economic development; third, to examine the main tourism schemes and other plans related to the tourist industry; and fourth, to study Morocco as an example of a developing country that uses tourism as the major driving force to generate economic activity. This study also proposes reflection on the changes in tourism-based development models and opens up a specific debate on economic development within the post-Fordist tourism model, in which real-estate investment plays an essential role.

Methodologically, this study takes the institutional approach to analyse Morocco's policy (Scott, 2011) and adopts the tourism policy evaluation model proposed by Hall (1994). The institutional approach sees tourism as strongly influenced by the actions of government, and is interested in the organisation of power and its relationship to policy, as well as the construction of regulations and incentives. Within this approach, this study revolves around the debate on the theory of regulation, a frame of reference that has the relationship between capitalism and the Fordist and post-

**Table 1.** Analysis of the components of tourism policy in Morocco: pre-Fordist phase.

Pre-Fordist period (1906–1968)					
Political-administrative environment	Weaknesses/demand for public policies	Political decisions	Policy outputs	Policy outcomes	Role of the state
French and Spanish Protectorate (1906–1956)	Weakness of the administrative structure	Focus on elite tourism	Large-scale development of tourism administration (numerous tourism bodies)	Slow growth in tourism demand and income	Broad state functions: developer, regulator, investor, stimulator and educator. State creating public accommodation supply
Independence (1956)	Lack of tourism infrastructure	Indicative economic planning	Creation of tourism supply	Poor quality of private accommodation	–
Construction of administrative structure and national economy	Inefficient tourism administration	Commitment to agricultural and industrial sectors, little interest in tourism	Attraction of international hotel chains	Imbalance in supply locations	–
Nationalism	Lack of experience in tourism and economic management	Entry of foreign capital	Financial incentives	–	–
Mohammed V	–	Some concessions to mass tourism (Agadir)	Creation of the first major sun-and-beach resort (Agadir)	–	–

**Table 2.** Public investment in the Moroccan tourist industry.

Economic plan	% Investment/total budget	Economic plan	% Investment/total budget
1958–1959	0.2	1973–1977	6.5
1960–1964	1.4	1978–1980	3.4
1965–1967	6.4	1981–1985	1.8
1968–1972	6.8	1988–1992	1.2

Source: Hillali (2007a).

Fordist means of production and accumulation as one of its main focuses of research (Rullán, 2008).

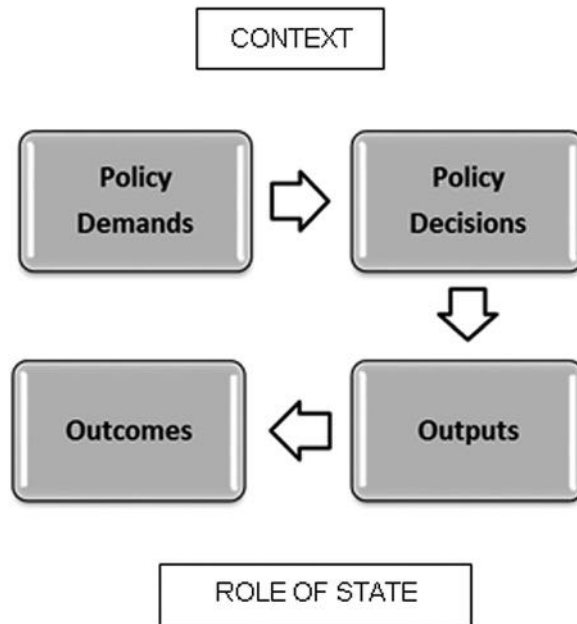
Hall's analysis (1994) is based on a number of core variables considered key to understanding a particular policy. The author includes these variables: *demands*, that is, those problems that attract the interest of the political system and, from which the government response occurs; *decisions*, the actions taken by the system to address that particular demand, including both major decisions as secondary; *outputs*, the use of goods and services to carry out the political decision, and finally, the *outcomes*, which are related to the results of the policy's implemented actions. In this approach proposed by Hall, the variable *context* refers to the structured environment where specific public action is incorporated. This context allows us to understand the development of the above factors. A second variable added is the *role of the state*, which focuses on the capacity for intervention in the economy and society (Figure 1).

**Table 3.** Analysis of the components of tourism policy in Morocco: Fordist phase.

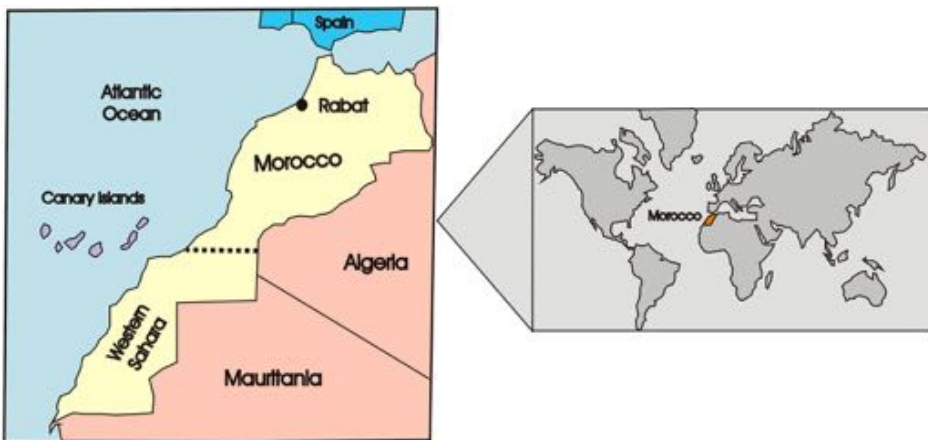
Fordist period (1968–1999)					
Political-administrative environment	Weaknesses/demand for public policies	Political decisions	Policy outputs	Policy outcomes	Role of the state
Hassan II	Lack of effective tourism plans	Focus on mass tourism	Holiday accommodation privatisation scheme	Growth in tourism income	Progressive economic liberalisation. Privatisations, less intervention in tourism
Stronger public administration.	Inefficient tourism administration	Indicative planning maintained, though progressively less significant	Financial incentives. Greater openness to international investment	Regional imbalance of supply is maintained	–
Problems with the Sahara (POLISARIO attacks) (1975–1985)	Sharp fall in tourism demand (1994)	1990s Economic Adjustment Policy	Investment in tourism diverted to the real-estate sector	Private sector performs better than the public sector	–
Negative economic effects of first Gulf War		Tourism is not on political agenda	New public agencies (SONABA and SNABT)	–	–
Terrorist attacks 1994	–	–	–	–	–

**Table 4.** Analysis of the components of tourism policy in Morocco: post-Fordist phase.

Pre-Fordist period (1999–2015)					
Political-administrative environment	Weaknesses/demand for public policies	Political decisions	Policy outputs	Policy outcomes	Role of the state
Mohammed VI	Improvement in tourist industry	Tourism as a driver for national economic development	Vision 2010 and Vision 2020 Tourism Plan	Strong growth in demand, income and employment in tourism	Economic liberalisation, coordination, attracting investment, infrastructure building, etc. The state assumes the cost of private investment
Need for economic revitalisation	Ending stagnation in tourism demand (1990s)	Focus on mass tourism	Creation of large resorts	Environmental impact	–
Social and economic problems (unemployment, Islamic pressure, migration, etc.)	Need for job creation	Connection with international investments (Europe – Gulf countries)	Economic liberalisation (liberalisation of airspace, international investment guarantees)	Tourism as ‘Social and economic Jihad’ (Buades, 2014)	–
Strong globalisation of investments	–	Withdrawal from indicative planning/ economic liberalisation	State shareholding in investment funds	–	–
Europe–USA economic crisis (2008)	–	Backing of real-estate/ residential sector	Creation of public management and investment agencies (FMDT)	–	–



**Figure 1.** Components of tourism policy. Source: Own elaboration; Hall (1994).



**Figure 2.** Localisation of study area. Source: Fernando Almeida.

Tourism in Morocco has been closely associated with state intervention. The role of the state and its tourism policy has gone through various cycles and situations in the last 60 years, but in recent years its presence on the political agenda has changed. This sector is no longer a secondary factor in national development policy and has become a major player.

Morocco is located in northwest of African continent, with an area of 446,550 km<sup>2</sup> (732,550 km<sup>2</sup>, including Western Sahara). This country is bordered by Spain, Algeria and Mauritania (Figure 2). In 2011, the population reaches 32.3 million, with a 58% urbanisation rate and \$7,900 GDP per capita (PPP) (CIA, 2015). Morocco has a Medium Human Development in 2015 (0.628, HDI) (UNDP, 2016).

## Phases of the Morocco tourism policy

### *The pre-Fordist and Fordist phase*

The advent of tourism can be dated to 1929 with the construction of the luxurious La Mamounia hotel in Marrakesh. The early initiatives to expand tourism in Morocco are owed to the Frenchman Marshal Lyautey, who attempted to offer places of rest for the French and for elite tourists (Chahine, 2010). The investments were therefore geared towards the construction of luxury hotels (such as the *Palais Jamai* hotel in Fez, 1929) in order to meet the demands of these visitors. Tourism began in Morocco during the Protectorate period, with both the French and Spanish Protectorates interested in developing the country, as evidenced by Morocco inheriting over 200 hotels from the colonial period (Berriane, 2009).

After independence in 1956, the state faced numerous challenges to organise the country. One of the main difficulties was creating the country's own productive structure to end economic dependency and create employment. In the early years, there was discussion around the model to follow: socialist or capitalist (Hillali, 2007b). At this time, the actions of Nasser's socialist government in Egypt had much appeal in the Arab world. But the development model leaned towards liberal capitalism, opting for the indicative planning that was widespread across the countries of the northern Mediterranean (Portugal, Spain, France, Italy, Greece, etc.) (Almeida, 2012; Williams & Shaw, 1988). Indicative planning was imposed on developing countries as a 'recommended' requirement for receiving loans from the World Bank, while security was provided for international investment, and it served as a basic document for the country's development process (Ramos & Pires, 2008). The sectors that public investment was directed towards in the 60s and 70s were primarily agriculture and water infrastructure and, secondarily, industry. Initially, tourism was not considered a true productive sector and it received little investment (Hillali, 2007a). The strong investment in water and irrigation infrastructure was an element common to many North African countries as they sought food self-sufficiency (Bénachenhou & Bénachenhou, 2004).

In the first two economic development plans (1958–1959 and 1960–1964), the investment reserved for tourism was low (Table 2). It was allocated to Morocco's historic cities and some resorts in the north. However, there was one factor that changed this situation: the creation of the resort of Agadir. In 1960, a catastrophic earthquake devastated this city. To alleviate the situation, the government turned Agadir into a major tourist destination and, unlike the traditional imperial cities (Fez, Meknes and Marrakesh), this new city became a destination for mass sun-and-beach tourism.

In 1965, the Triennial Social and Economic Development Plan was approved, making a somewhat more determined commitment to tourism (Table 2). Tourism was given various 'classic' functions such as obtaining foreign currency to fund development schemes, creating jobs, raising local saving and attracting foreign investment. In theory, the government intended tourism to be not just an auxiliary sector, useful for balancing payments, but also an industry that would play a key role in development; in 1965, a Ministry of Tourism was even created in order to facilitate the process. In practice, the bulk of public investment continued to go to agriculture, water infrastructure and the training of technical staff. Furthermore, this Plan resulted in a plethora of public bodies related to tourism that in fact hindered the process and increased the power of 'the Madjen'.<sup>1</sup>

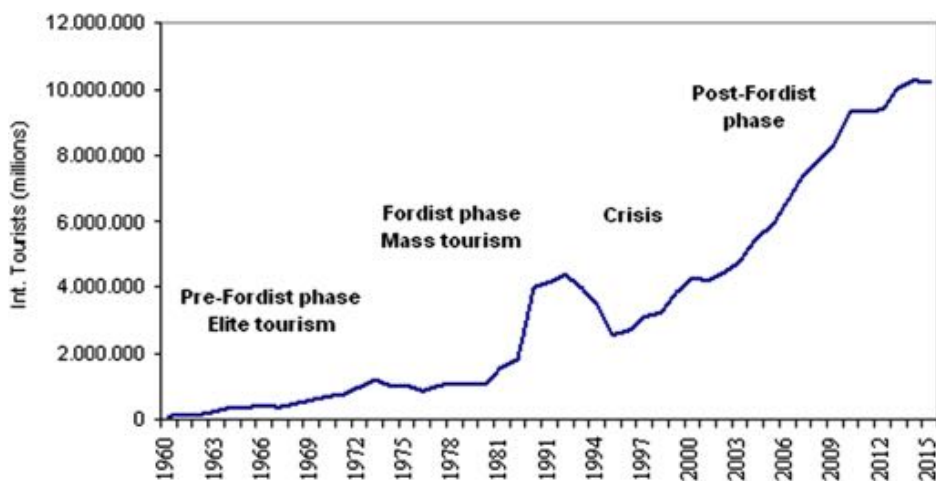


The Triennial Plan created a number of regional development figures, earmarking Priority Planning Zones (ZAP). For their implementation, the areas with the most significant tourism resources, located in disadvantaged parts of the north (Tangier, Al Hoceima and the Tetouan coast) and south (Agadir and the Ouarzazate-Errachidia axis), were selected. Initially, state intervention was considerable, as evidenced by the fact that government subsidised 95% of the bed places created in the ZAPs in the north (Hillali, 2007a). The economic adjustment programme of the 90s and the high deficit accumulated by these bodies resulted in their closure and privatisation in that decade.

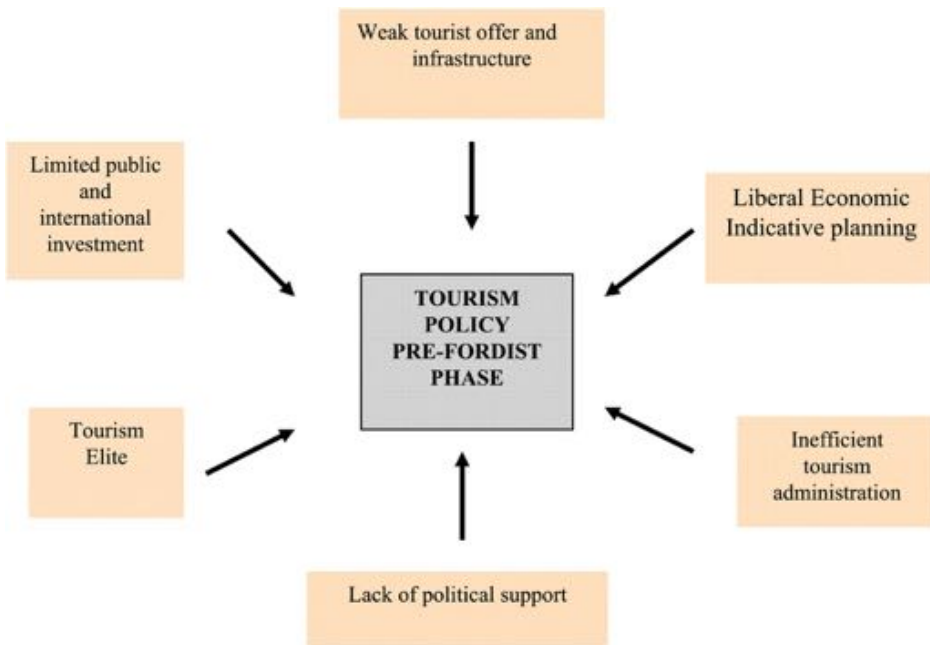
To improve and expand the tourism accommodation supply, the state promoted the creation of state-run accommodation. Management of it was entrusted to various public and semi-public bodies, including the Moroccan National Tourist Board (ONMT), the Deposit and Management Fund (CDG), the Moroccan Society for Tourism Development (SOMADET), Maroc-Tourist, etc. (El Haddadi, 2010). The ONMT was responsible for various tasks like promoting tourism and organising travel, intervening very directly in creating tourism accommodation. In 1976, it came to manage 20 tourism establishments with 4526 beds, forming the Morocco's first hotel chain. Many of these hotels and villas were later privatised. The CDG was a national investment company that centred its activity on building in the country's least developed areas. Figure 4 shows the major factors of tourism policy model of the Fordist phase.

In this decade, in addition to strong public intervention, the entry of foreign private investment should also be noted, including the French chain *Club Méditerranée*, which built six holiday resorts in Morocco. The first was the *Club Med* in Al Hoceima, which opened in 1964, followed by the one in Agadir in 1965. In 1985, the eight *Club Meds* had a total of 4170 bed places (Hillali, 2007a).

The 1968–1972 Five-Year Plan continued to advocate expanding the accommodation supply. While in previous plans, the investment effort was geared towards high-quality hospitality, in this plan, the initiatives focused on mid-range accommodation, in line with the mass tourism it hoped to attract. The state set in motion large-scale urban and



**Figure 3.** Evolution of tourists in Morocco. Phases of tourism policy. Source: Hillali (2007a), (1960–1980), UNWTO (1981–2015).



**Figure 4.** Tourism policy model in pre-Fordist phase.

territorial planning projects aimed at accommodating large numbers of tourists. To manage these projects, the National Agency for the Planning of the Bay of Agadir (SONABA) and the National Agency for the Planning of the Bay of Tangier (SNABT) were created, joining the previous organisations (El Haddadi, 2010).

Throughout the period 1965–1972, the state was the main implementer of the tourism policy, taking on 80% of the investment in the tourist industry. However, this figure must be taken in context, since tourism only accounted for 6.6% of total public investment between 1965 and 1972. Along with direct investment, the state created other financial instruments to boost the industry. Moreover, financial subsidies and incentives were established (Investment Regulations of 1960, 1973 and 1983) and loans for real estate and hotels were also promoted. By way of example, in this period, the state guaranteed around 75% of the cost of investments in tourism operations through tax breaks and hotel loans.

The main aim of both the 1973–1977 Five-Year Plan and the 1978–1980 Triennial Plan was to encourage mass tourism. Between each plan, the social and economic context varied widely due to the serious economic problems caused by the Oil Crisis, the fall in phosphate prices and the political crisis resulting from the annexation of the Western Sahara. The percentage of investment in tourism activities during these two economic plans was significantly reduced. One striking aspect was the limited success in terms of effective implementation of the accommodation envisaged by the public and semi-public sector in the Five-Year Plan (just 4200 of the 14,000 bed places envisaged). The private sector managed to execute 70% of the planned capacity. At the same time, the private sector utilised the loans and financial incentives to build second homes, in a similar way to what was happening in Spain in the same period: the private sector had lost interest in hotel building in favour of residential tourism and real-estate activity in general (Esteve & Fuentes, 2000).

The destinations with the lowest levels of public investment performed better than the northern Mediterranean area where much of the public investment in tourism was concentrated and where poor results were obtained (Hillali, 2007a, p. 130).

The withdrawal of state investment in tourism activities was the norm in the subsequent plans. Indeed, the state provided only limited investment in the 1988–1992 Five-Year Plan and its actions focused on new tourism projects (second homes, mountain holidays). One of the most notable events was the sharp fall in foreign tourists in 1994, related to the terrorist attack in Marrakech, as well as the effects of the First Gulf War (Berriane, 2009; Moudoub & Ezaïdi, 2005) (Figure 3). In this negative context of loss of demand along with internal economic problems, Framework Law 18/95 was adopted, limiting public support for tourism. Morocco's economic adjustment programme backed by the World Bank required major restructuring of the tourist industry, which was already experiencing serious economic difficulties caused by the stagnation of foreign demand in the 1990s (Figure 3). In accordance with the Adjustment Plan, in 1990, the process of privatising the public tourism enterprises began, resulting in the sale of most public tourism establishments. A Ministry for Privatisation was created for this purpose. Thirty-seven 4- and 5-star hotels were put up for sale and acquired by international and national chains (Ouahidi & Mzidabi, 1994).

To summarise, during the 60s and 70s, the state intervened as a planner, investor, developer and builder in order to boost the national tourist industry; in the 80s and 90s, there was a reduction in tourism investment and accommodation was privatised; at the turn of the century, the state reinstated tourism as an economic driving force with an important role in the political agenda. The Figure 5 shows the main factors of tourism policy model of the Fordist phase.

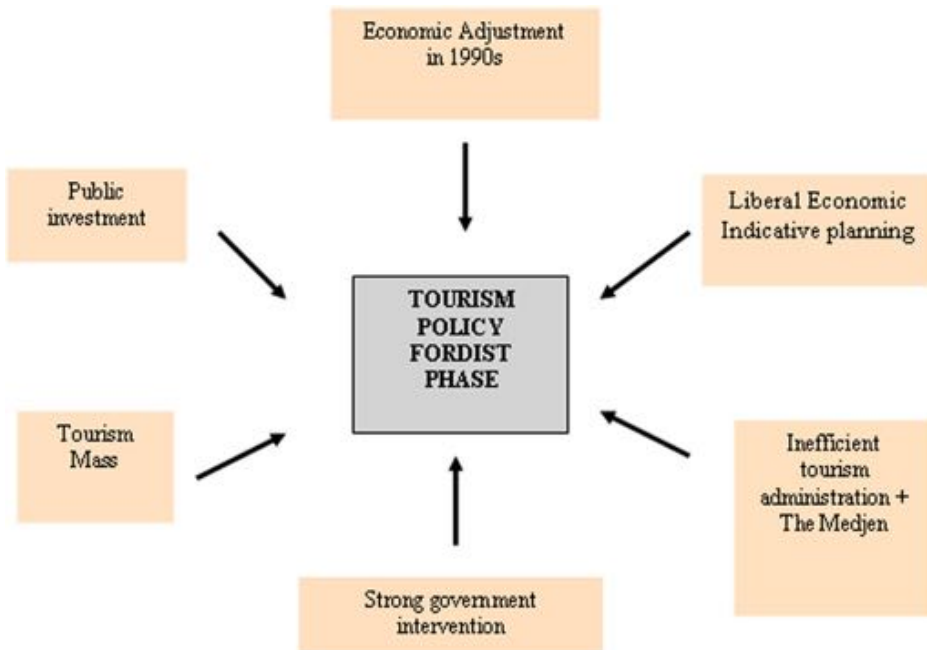


Figure 5. Tourism policy model in Fordist phase.

### **Post-Fordist phase**

With the arrival of Mohammed VI to the throne in 1999, there was a change of direction in Morocco's tourism policy. Tourism became one of the mainstays of the country's economic development, and the state sees turning Morocco into a tourist destination as one of its main goals. To achieve this, the public powers approached this tourism development in a classic way: creating a number of strategic tourism plans, attracting international investment, liberalising air space, financial incentives and enabling the creation of large holiday/real-estate resorts aimed primarily at the European market (Almeida, 2011; Chahine, 2010). Attracting international investment, both from Europe and the Persian Gulf, played a very important role in this process, funding hotel accommodation and to a large extent the residential tourism. In this phase of tourism policy, the state became an agent for investment targeting international capital and acted as guarantor for the construction of the large resorts and tourism infrastructure. Equally, the government implemented significant deregulation of tourism-related economic sectors, particularly aviation, and spent large sums on infrastructure for the tourist industry.

In 2001, an important gathering of the tourist industry was held in Marrakesh, in which a major national tourism plan was unveiled: *the Vision 2010 Plan*. This plan was the beginning of a change in tourism policy. It was a plan for strong short-term growth in tourism, aiming to achieve big numbers in less than 10 years, by 2010. The main aims set by the plan were as follows:

- a) To attract 10 million tourists in 2010.
- b) To host 7 million international tourists in hotels, reaching an accommodation capacity of 230,000 beds.
- c) To build 6 major resorts.
- d) To achieve foreign currency revenue of 8.873 billion dollars.
- e) To create 600,000 new direct jobs.
- f) To train 72,000 tourism professionals.
- g) To increase the percentage of GDP spent on tourism from 6.5% to 8.0%.

The plan was organised around six main areas: product, transport, training, marketing and promotion, institutional organisation and the tourism environment. The most significant area was the product, which accounted for the majority of the actions in the plan and had a budget of 4.84 billion dollars<sup>2</sup> (Ministère du Tourisme, 2013).

The results of this plan show that some of the major economic targets were achieved: tourism spending exceeded 8% of GDP in 2010; 9.3 million international tourists visited Morocco in 2010 (though half were Moroccans resident abroad); and income from tourism was close to its target (\$ 6.702 billion). However, some objectives were clearly not met (Traspaderne, 2011). The accommodation supply envisaged in the Vision 2010 Plan and its specific plans, the Biladi Plan and the Azur Plan, did not materialise. The Biladi Plan is geared towards domestic demand and its mission was to build a significant number of tourist facilities, of which only one has opened. The Azur Plan was an ambitious scheme to create large beach resorts, offering 80,000 bed places. Of the six large resorts that would cover over 2500 hectares, only two have opened: Saïdia and Mazagan. This plan has been badly affected by the world economic crisis of 2008,

which was most intense in Europe, where many of the companies investing in the plan are based (Spain, France, Belgium) (Gil de Arriba, 2011).

In addition, Vision 2010 proposed a reorganisation of the tourism-related administrative structure. The main change has been the creation of a new body, the Moroccan Agency for Tourism Development (SMIT), dedicated to tourism planning and investment. This public agency created in 2007 grouped together three public bodies: the Adaptation and Investment Directorate (DAI), and the Agadir (SONABA) and Tangier (SNABT) Development Agencies. SMIT has intervened in the development of the resorts of the Azur and Biladi Plans, as well as in attracting international investment. Despite this reduction in bureaucracy, a large number of tourism-related public bodies remain, in addition to the Ministry of Tourism itself (Ministère du Tourisme, 2013).

In the same vein of tourism growth and seeking international capital, *the Vision 2020* Plan was created. This plan is a continuation of Vision 2010, though it sets even more ambitious objectives aiming to maximise tourism activity. The primary goal is to make Morocco one of the top-20 tourist destinations in the world. The main aims of this document are as follows:

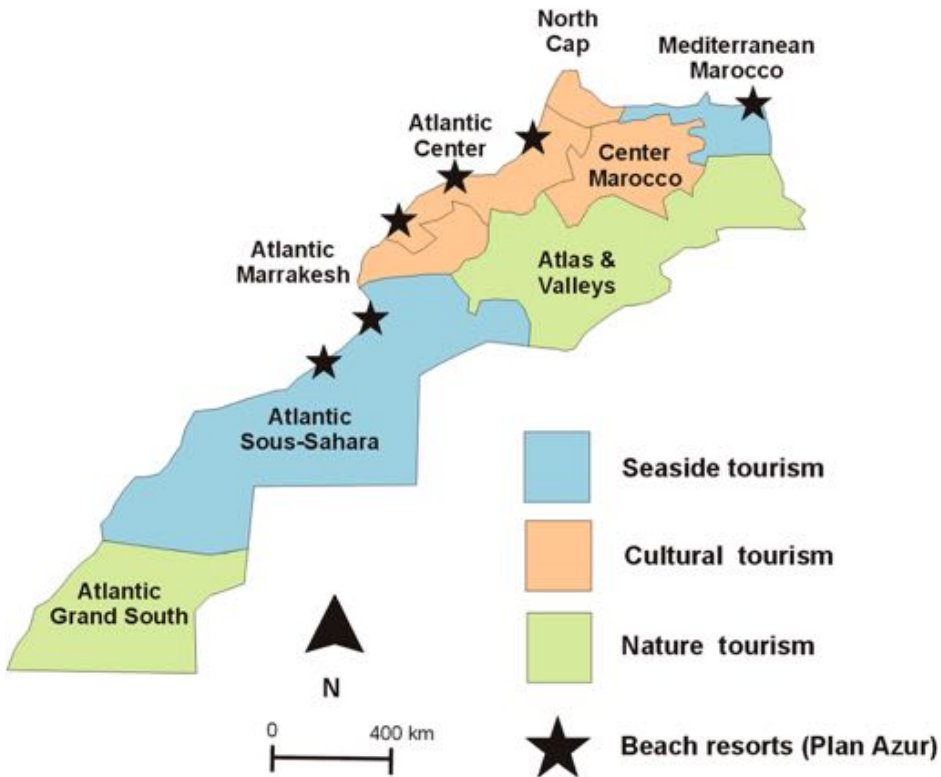
- a) To double the tourist accommodation capacity with the construction of 200,000 new bed places, of which 160,000 are hotel beds and 40,000 are Residential Properties for Tourism.
- b) To double the number of international tourists to 20 million in the horizon of 2020.
- c) To treble the number of domestic air passengers.
- d) To create 470,000 new direct jobs.
- e) To increase income from tourism to 15.5 billion dollars in the horizon of 2020.
- f) To increase the contribution of tourism GDP to the national GDP by 2% points.

In order to diversify the tourism offering and span all of the country's regions, this new 'Vision' has created eight tourism territories<sup>3</sup> that offer a range of projects and tourist areas (Figure 6).

Within the Vision 2020 Plan, six tourism schemes<sup>4</sup> have been set out, coordinating the tourism actions carried out in the eight tourism territories. The implementation of Vision 2020, according to the preliminary evaluations, will require around 16 billion euros of public and private investment to be mobilised, including the budget for promotion and distribution, incentives to investment, the investment budget, the training system, public and private capital, and bank financing at national and international level. This large sum amounts to almost 18.5% of the country's GDP in 2013 in nominal terms (CIA, 2015).

In support of the Vision 2020 Plan, the state has formed a new public institution whose purpose is to facilitate financing and accelerate the implementation of projects. This new body is the Moroccan Tourism Development Fund (FMDT). It is a public investment fund under the umbrella of the Moroccan Ministry of Tourism and a joint venture between the state and the Hassan II Fund with 1.66 billion dollars of capital for a period of 10 years. This fund will focus on strategic tourism companies and projects, and on developing the major tourism projects.

The purpose of the fund is to consolidate the financing of the sector, to seek international investment and to direct institutional savings towards the tourist industry. The FMDT is the gateway for domestic and international investors wanting to invest in the



**Figure 6.** Resorts and regions. Vision 2020 Plan. Source: Own elaboration.

Moroccan tourist industry. It is also responsible for bringing together Morocco's investors and public and private entrepreneurs.

The FMDT's initial interventions have been geared towards refloating the Plan Azur resorts. The FMDT has acquired shares in the new allocation of the Saïdia and Taghazout resorts, taking on 30% and 25% of their shareholdings, respectively, alongside other Moroccan public and private organisations in the tourist and real-estate sector (*CDG Développement*<sup>5</sup>, *Groupe Alliances*<sup>6</sup>, *Sud Partners*<sup>7</sup>, SMIT, SDS<sup>8</sup>). Through the FMDT, the state has taken over the maintenance of these projects from the Vision 2010 Plan, as well as the completion of those already begun. A quick assessment of the completed projects does not show them to be very profitable for the Moroccan state due to the cost of buying the shares, the financial incentives granted to companies and the high expenditure on infrastructure building.

There are two significant changes in the Vision 2020 Plan. First, international funds have become a major factor in the financing of the plan, and second, there has been a change in the source of investment (Shamamba, 2005; Verdaguer, 2005). In the Vision 2010 Plan, international capital was linked to large construction firms and international hotel chains, primarily originating in Europe (Spain, France and Belgium), the United States and South Africa, as well as Moroccan companies. Furthermore, the role of international investment funds was secondary. In contrast, in the Vision 2020 Plan international funds predominate, with a high proportion of Persian Gulf countries.

This new situation is explained in part by the serious economic crisis of the European countries. Until 2008, there was significant investment in tourism and real estate from Europe and Spain in particular (García & Tacias, 2007; Saad, 2008). Since 2008 it has been the Persian Gulf countries and other Islamic countries that have filled the gap left by Europe in tourism and real-estate investment (Baabood, 2009). In 2009, the second largest foreign investor in Morocco was Kuwait, with 14.9%, and the fourth was the United Arab Emirates, with 5.9%; in 2011, the largest continued to be France, with 37%, and the third was Spain, with 8.3% (Gil de Arriba, 2011). The best example of the above is the creation of the Wessal Capital investment fund, established between Morocco and the countries of the Gulf Cooperation Council. Wessal Capital is a consortium of four sovereign funds originating in Kuwait, the United Arab Emirates, Qatar and Morocco, created in 2011. It has two billion euros of capital, making it one of Africa’s largest investment funds (FMDT, 2012). Much of its investment is directed to funding Morocco’s strategic tourism projects. The fund is made up of (i) *Al Ajial Investment Fund Holding*, an investment fund of the ‘*Kuwait Investment Authority*’ (KIO); (ii) *Aabar Investments PJS*, a subsidiary of the company ‘*International Petroleum Investment*’ (IPIC), which is owned by the Abu Dhabi Government; (iii) *Qatar Holding LLC*, the sovereign investment fund of the ‘*Qatar Investment Authority*’ and (iv) *Fonds Marocain de Développement Touristique*, the FMDT<sup>9</sup>, which is the Moroccan backer of Wessal

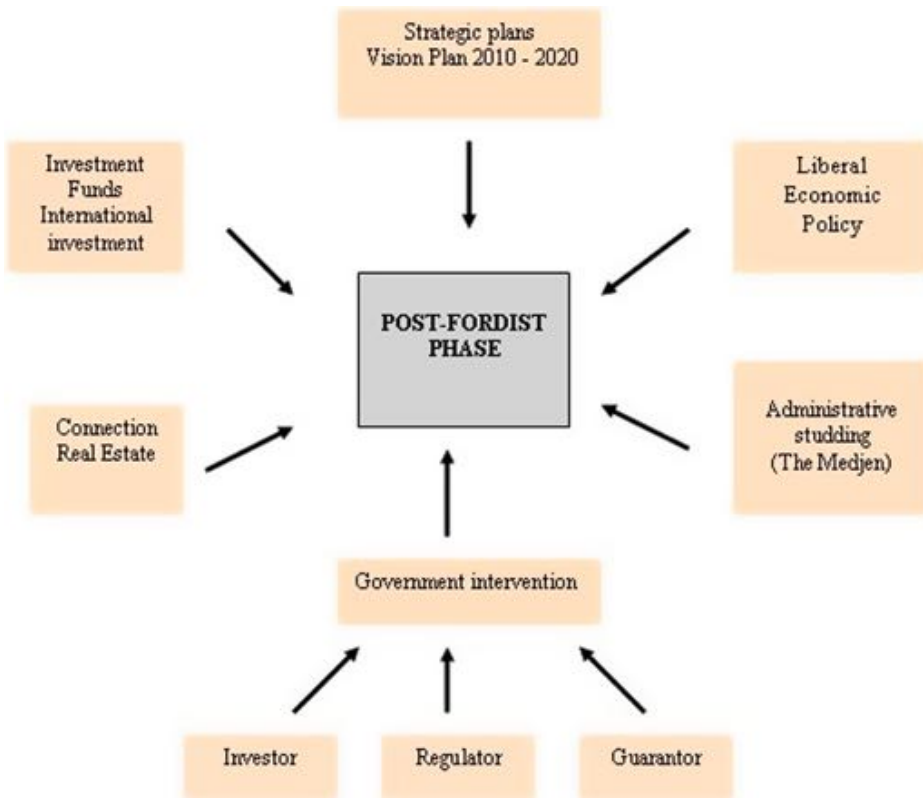


Figure 7. Tourism policy model in post-Fordist phase.

Capital. Another important investment fund is ASMA, a fund set up between Saudi Arabia and Morocco, owned by the Moroccan State and the Saudi Royal Household. It had around 500 million dollars, allocated in part to tourism projects. Tourism projects at this stage have resulted in significant environmental impacts. Examples of these environmental problems are the big resort areas Saidia or tourist homes in the city of Martil. Both areas are on the Mediterranean coast of Morocco and buildings have affected areas of great environmental value (Araque, 2013).

Figure 7 summarises the main factors involved in the tourist policy of the Post-Fordist phase. Among these aspects, the significant role of the State, the close connection between large tourist resorts and real estate, the significant participation of international investment funds, the design of large tourist plans, etc. should be highlighted. The factors involved in the tourism policy of this period clearly differ from the two previous phases.

## Conclusions

Tourism in Morocco has been closely associated with state intervention. The role of the state and its tourism policy has gone through various cycles and situations in the last 60 years. But in recent years, its presence on the political agenda has changed. This sector is no longer a secondary factor in national development policy and has become a major player.

The pre-Fordist Moroccan political phase is characterised by a serious lack of political support, and public and private investment. After independence, state investment was directed towards industrial and agricultural projects. Unlike other nearby countries, such as Tunisia, Morocco did not back tourism as a driver for development. It opted for a classic investment model in 'productive' sectors, within the framework of the regional growth and indicative planning models, similar to those implemented in the southern European countries (Portugal, Spain, France, Italy and Greece) (Richardson, 1975; 1986). During the Protectorate period and until the 1960s, it received elite tourists attracted by the exoticism of a land very near Europe, similar to the experience of Spain in the nineteenth century. According to some authors, this oriental exoticism remains an attraction today (Gil de Arriba, 2011) (Table 1) (Figure 4).

The Fordist phase marked the significant growth of tourism, both in cultural destinations (the imperial cities) and in Agadir's sun-and-beach tourism (Table 3). This marked the beginning of mass tourism, which experienced strong growth in the 1980s. In the 1990s, there was a sharp decline that coincided with various factors, as the economic crisis, the economic adjustment programme and the terrorist attack in Marrakech in 1994 (Figure 3). During the reign of the previous monarch, Hassan II, the Moroccan state did not consider tourism as a key factor in Morocco's economic development, although public investment was significant. One element that made the tourism policy of Hassan II's government less effective was the complex web of public and semi-public tourism enterprises that were poorly run, had questionable profitability and served rather to protect the interests of groups close to power. There were also limited investment opportunities due to the inefficient tax system (Verdaguer, 2005). This situation, along with pressure from the International Monetary Fund, explains the privatisation process of the 1990s. From then on, there was a progressive withdrawal of public initiative in the tourist industry.



At this stage, tourism was never a real way for the country to achieve socio-economic development, rather it fulfilled a support function in the extensive support network of political and economic structure and connections with transnational corporations.

The post-Fordist phase began with a clear recovery in international tourist arrivals, which highlighted the change in the guidance of the tourism policy of Morocco. From the year 2000, the state once again became the main driver of tourism activity and took on the bulk of investment. The state showed a clear interest in supporting tourism and opening the national tourism market to international investments. To do so, tax benefits and incentives to foreign investment in tourism were offered, the economy was liberalised (Open Sky<sup>10</sup>), major international investment funds were attracted (e.g. Wessal) and new national investment and management bodies were created (e.g. Moroccan Fund for Tourism Development). But this liberalisation was not accompanied by a withdrawal of public investment; the state continues to contribute considerable natural and financial resources, making the business highly profitable for foreign investors. The country used methods already known in other developing tourism countries, like Spain in the 1960s or some Caribbean islands in the 1990s (Almeida, 2012; Blázquez & Cañada, 2011). The resorts promoted by the Azur Plan bear a striking resemblance to the National Visitor Attractions developed along the Spanish coast from the 1960s to the 1980s. In general, Morocco's current tourism development is going through the same situation as Spanish tourism development in the 1960s. Knowing the consequences this had in Spain, the Moroccan state could work to minimise the negative effects, such as the severe environmental impact, excessive real-estate supply, dependence on external tourism agents and investors (Araque, 2013; Galiana & Barrado, 2006).

The change in the direction of the tourism policy has also coincided with a shift in the productive model of Morocco's tourist industry (Table 4). The country has used tourism as a driver for development under the premises of the post-Fordist productive model. Many countries have used tourism during their Fordist phase to revitalise their economy. This process, which is identified with classic mass tourism, uses common elements of the tourism system (hotels, travel agencies, tour operators, package holidays, etc.). This model aims to reduce the unit costs of production and to sell to as many tourists as possible.

In the post-Fordist phase, other variables come into play, such as productive relocation and flexibility, the pursuit of a tourism segment and two factors that become particularly important in Morocco's case: the intervention of international investment funds, in many cases from outside the tourist industry, and interconnection with the real-estate sector (Figure 7). The real estate factor is of singular importance. New tourism plans generally have these two sides (tourism and real estate). Resorts do not seem to work if there is no real-estate development. Secondly, the Vision 2010 Plan emerged during the construction boom in Europe and Spain in particular, and the two factors are closely related. This plan was part of the expansion of the European and Spanish property bubble. It is no coincidence that Fadesa, one of the most prominent building firms of the Spanish housing bubble, undertook two of Morocco's tourism megaprojects. The Vision 2020 Plan subsequently became linked to the Persian Gulf's real-estate bubble (Baabood, 2011).

This close link between tourism and real estate must be taken into account within the concept of the space-time solution proposed by Harvey (2001). Excess capital production requires an outlet in order to maintain its profitability, and so that it does not generate inflation. An excellent solution is to anchor this financial capital to the land through

residential tourism housing, which generates much higher profits than conventional hotel activity. The creation of seaside destinations for residential tourism is an excellent solution for capital accumulation, and the Vision 2010 and 2020 plans are unbeatable destinations for this capital.

More questionable is the economic and social profitability of these plans for the countries receiving foreign investment. Like the cases studied in the Caribbean (Britton, 1982; Lea, 2006) and Europe (Almeida, 2012) for the Fordist models, the final outcome bring into question this supposed profitability. Social and environmental externalities and the economic costs borne by the Moroccan government, such as the Azur Plan resorts, cast doubt on the overall profitability of the furthered model.

Finally, we have to emphasise that the strong tourism growth that has occurred in the post-Fordist phase has resulted in a model of development in Morocco in recent decades that is characteristic of countries that are using tourism as a development path. This model is identified by the intensity of growth in international tourist arrivals, dependence on international funds, support from host governments, the connection with real-estate investments and flexibility, and outsourcing production processes linked to the economic globalisation (Figure 7) (Chahine, 2016).

## Notes

1. The country's ruling elite
2. Creation of new tourism products and new holiday resorts:
  - Azur Plan: Proposes the construction of six coastal holiday resorts each targeting a different and specific market segment, focusing on six new development areas. Receives financial support from the Hassan II Fund. Modelled on the big Caribbean and Asian resorts. The resorts put forward are: Mediterranean Saïdia, Mazagan Beach Resort, Port Lixus, Mogador Essaouira, Taghazout-Argana Bay and Plage Blanche-Guelmin.
  - Biladi Plan: The strategy of this plan is to market internal tourism, developing accommodation for domestic tourists at affordable prices in eight locations.
  - Mada'In Plan: The aim is to consolidate, strengthen and add value to the old tourist destinations, whether they offer cultural tourism, sun-and-beach tourism, or both
  - Rural Tourism: The objective is to adopt a development strategy for rural tourism and to consolidate tourism in the rural environment (offering adapted accommodation, local entertainment and planned itineraries).
3. The concept of "tourism territory" is understood to relate to a territorial division for tourism purposes, while "region" refers to an administrative division.
4. Aims of the six tourism schemes: Azur 2020 (sun-and-beach supply), Sustainable Eco-Development, Cultural Heritage, Leisure and Sports, Domestic Tourism and Business, Health and Well-Being.
5. A subsidiary of the Deposit and Management Fund (CDG).
6. One of the country's large real-estate groups.
7. Sud Partners is a consortium of several Moroccan investment funds.
8. Saïdia Development Agency, formerly the Saïdia Planning Agency (SAS).
9. The FMDT is investing in the sun-and-beach resorts of the Azur Plan in order to refloat and relaunch these actions.
10. Plan of economic liberalization of the air sector.

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