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EVOLUTION OF TOURISM POLICY AND STATE INTERVENTION: THE CASE OF MOROCCO

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This study analyses the evolution of Moroccan tourism policy, which has graduated from being a secondary factor in the country's economic development to playing a predominant role in recent years. In the years immediately after independence (1956–1961) no clear tourism policy was set out; there was greater interest in developing other 'productive sectors'. During the long reign of Hassan II (1961–1999), periods of clear support for tourism alternated with others of stagnation and neglect. But tourism was never central to the country's economic development policy as it was in other nearby North African countries (Tunisia and Egypt) and European countries specialising in tourism (e.g. Spain and Italy). Since 1999, with the reign of Mohammed VI, tourism has received a major boost, underpinned by large-scale development plans (Vision 2010 and 2020) and measures to attract investment.

This study should be seen 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 that government plays, specifically in this case the role of the Moroccan state. Moreover, this study is in keeping with numerous studies which highlight the notable intervention of government in the development of tourism policy and its close links with the economic development process. This subject is receiving increasing attention in the fields of tourism and economics. These analyses have been more concerned with highlighting the achievements of economic and tourism policy than with territorial and social imbalances.

Morocco, with 10.2 million tourists in 2015, continues to be Africa's leading destination for tourist reception and the third by tourism revenue behind South Africa and Egypt (UNWTO, 2016). These figures are the result of strong growth in the last ten years. Steady growth has been maintained despite the recent political turmoil affecting other tourism-orientated countries in North Africa, particularly Tunisia and Egypt. From 2010 to 2013, the income generated from international tourism totalled around 6.5% of GDP (UNWTO, 2014). This study analyses the three main phases in which politics has been divided: pre-Fordist, Fordist and post-Fordist.

Pre-Fordist phase. Tourism began in Morocco during the protectorate when supply was focused on elite tourism catering to interest in Morocco's Muslim heritage. After independence in 1956, the state faced numerous challenges to organise the country. In the 1960s and 1970s, public investment was mainly directed to agriculture and water infrastructure, and investment in industry was secondary. Initially, tourism was not considered a genuinely productive sector and received little investment. State investment was channelled into the indicative planning and subsequent development plans.

Table 1
BASIC DATA ON THE TOURISM SECTOR IN MOROCCO

	1991	1995	2000	2005	2010	2013
International Tourists	4,162,000	2,602,000	4,278,000	5,843,000	9,228,000	10,046,000
Tourists from Europe (%)	57.4	81.7	82.7	44.6*	44.6*	42.9
Average stay (days)	4.0	7.5	6.9	6.3	7.7	8.5
Accommodation (bed places)	116,171	122,956	127,829	124,270	120,039	132,076
Occupancy rate rate (%)	37.0	45.8	52.0	38.0	35.0	31.0**
Inter. tourist expenditure ($ million)	1,050	1,304	2,039	4,610	6,702	6,850
Tourist percentage of GDP	4.0	4.0	6.8	9.1	8.9	8.7**

* Does not include Moroccans living abroad ** Data 2012
Source: UNWTO (1991-2013), Hillali, 2007 (GDP, 1991-1995).

In the first economic development plans after independence, investment dedicated to tourism was scarce, and went to the few resorts in the north of Morocco and the historical cities. In the early 1960s, the first great seaside destination of Agadir was created. In 1965, the Triennial Plan was approved, which opted more clearly for tourism. This plan established a number of tourism development areas where tourism supply was concentrated: Tangier, Al Hoceima, the coast of Tetouan, Agadir and Ouarzazate-Errachidia axis.

To improve and expand the tourism accommodation supply, the state promoted the creation of state-run accommodation. Its management was entrusted to various public and semi-public bodies, including the Moroccan National Tourist Board (ONMT). By 1976, it managed 20 tourism establishments with 4,526 beds, forming Morocco's first hotel chain. Many of these hotels and villas were later privatised in the 1990s.

The Fordist phase. Since the early 1970s, tourism policy is focused towards attracting mass tourism. This decade is marked by several economic and political events, including the political crisis of Western Sahara (1975) and the economic Oil Crisis (1973). These facts led to a decline in direct government investment in the tourism sector, and this lack was attempted to be compensated by tax incentives and grants.

In this period, the group of public tourist organisations was joined by two agencies for promotion of Agadir and Tangier. In the 1990s there were material facts affecting tourism: a sharp drop in tourists was registered related to terrorist attacks and the first Gulf War; on the other hand, privatisation of much of the public supply of tourist accommodation was initiated. To this we must add a further decline in public investment in the tourism sector.

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 saw turning Morocco into a great tourist destination as one of its main goals. To achieve this, the public powers approached tourism development in a classic way: creating strategic tourism plans, attracting international investment, liberalising air space, providing financial incentives and enabling the creation of large holiday/real-estate resorts. In this phase of tourism policy, the state became an agent for investment, targeting international capital and acting as guarantor for the construction of large resorts and tourism infrastructure. In this period, the real-estate business gained importance in the development of destinations and connected with the objectives of international investors.

The first great tourist plan launched was Vision 2010, which was allocated a budget of $4,840 million, primarily destined for the large resorts. The main objectives of Vision 2010 were: (i) attracting 10 million tourists in 2010; (ii) reaching an accommodation capacity of 230,000 beds; (iii) building six large resorts, and (iv) creating 600,000 new jobs. It is articulated through four major plans:

- Azur Plan proposes building six coastal tourist resorts that will be poles of development (Mediterrania-Saidia, Mazagan Beach Resort, Port Lixus, Mogador Essaouira, Taghazout-Argana Bay and Plage Blanche-Guelmin). These seaside resorts combine hotel supply with secondary tourist houses and leisure centres.
- Biladi Plan will create eight resorts for domestic tourism, with affordable prices.
- Mada'in Plan aims to improve the old cultural destinations, seaside areas, or mixed destinations.
- Rural Tourism Plan aims to boost tourism in rural and natural areas.

Vision 2020 is a continuation of Vision 2010, but this new project establishes much more ambitious goals, with the aim of maximising tourism activity. Public and private investment is estimated to be about 18,000 million dollars. The main objective is to ensure that Morocco is one of the 20 biggest tourist destinations in the world. The main objectives of this plan are: (i) double the capacity of tourist accommodation, by creating 200,000 new beds; (ii) double the number of international tourists to reach 20 million tourists in 2020; (iii) triple the number of trips for domestic tourists; (iv) create 470,000 new jobs and (v) increase tourism revenues to reach 15,500 million in 2020. The main strategic documents are maintained as the Azur Plan (resorts) and the Biladi Plan, and it emphasises tourism products related to culture, nature, business, health, etc.

The Azur Plan for both 2010 and 2020 has not had the success expected, in large part due to the problems caused by the economic crisis in Europe. This fact has affected developers of the resorts, reducing the number of potential European customers who would purchase tourist homes. Regarding this, an interesting case is what happened with the Spanish company Fadesa when it was awarded the contract for the Saidia resort: this was severely affected by the crisis in Spain and the company had to sell their stake in the project. From 2008, Persian Gulf countries and other Muslim countries came to cover the European gap in tourism and real-estate investment. To continue the Vision 2020 plan, a new public body was created to finance the sector, attract new international investment (mainly in the Persian Gulf) and take care of the large resorts. This new agent is the Moroccan Fund for Tourism Development (FMDT).

The general balance of the two plans highlights some clear successes: sharp increase in tourists (first destination in Africa), tourism revenues (7,000 million dollars in 2014) and jobs created (500,000 direct jobs); but the economic profitability to the state may be questionable, taking into account all economic costs, since the state has had to make major investments in infrastructure and bear the costs of the larger resorts.