

## Tourism as a driver of sustainable development and inclusion – Toward a new national tourism strategy



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The CESE highlights that, since independence, serious efforts have been made to promote tourism through infrastructure development and by putting in place required tourism regulatory and institutional frameworks.

Morocco has made efforts to support the development and competitiveness of its tourism industry. This has deservedly earned the country fame as a top tourist destination in Africa. Tourism contributes significantly to national economy: it represents 7% of GDP and accounts for 20% of export earnings. The sector also employs 5% of the labor force, with 550,000 direct jobs (ONMT, 2019).

Nevertheless, and despite the efforts made, tourism in Morocco has not yet reached its full potential. The sector continues to suffer from countless problems, including organizational overlap and perceived public and private sectors' incompetence in managing tourism. Tourism in Morocco continues to receive inadequate funding and is still constrained by a shortage of qualified manpower and a limited range of leisure and entertainment activities. It is also still characterized by a threefold concentration: the tourist-exporting countries, the host destinations, and the seasonality of tourist arrivals.

The findings were also that the COVID-19 pandemic-induced health crisis has intensified many of these weaknesses. Air transport, travel agencies, accommodation, catering, cultural, entertainment and other tourism-related activities have borne –and still bear– the brunt of the economic impact of the pandemic and associated lockdown measures. The pandemic caused a sharp drop in tourism arrivals by 79%, reduced hotel bed nights by 72% and a 63% loss in tourism revenues (survey time period January to October 2020).

In view of the findings and conclusions, and building on the many initiatives already in place to promote national tourism, the Council advises for the tourism sector to flourish that the following levers of action must be activated:

- **Inclusive and effective governance** : voting a tourism framework law, while implementing the inclusive strategic planning process for tourism, ensuring a toolkit full of resources and skills to tap into, and allowing for effective monitoring and evaluation along the entire value chain.
- **Sustainable and responsible tourism**: the Moroccan Charter for Sustainable Tourism needs to be used in its full potential, while taking advantage of various tax revenues to pursue durable, productive, job-creating and value-maximizing investments in the tourism ecosystem in the host community.
- **Digitalization**: as digital technology is now the primary medium through which consumers can access tourism products and services, it should be the focus of our communication and marketing efforts.
- **National tourism**: it is essential to promote a range of products tailored to the needs of Moroccan tourists and to boost investment by bringing onto the market new sustainable and more attractive and competitive national tourism products to help relaunch the market.
- **Human capital**: the aim is to review the vocational training system by developing target specialties and tourism engineering beyond the hospitality industry.
- **Territorialization**: the advanced regionalization and the national administrative decentralization charter constitute an opportunity to substantiate the process of balanced development of tourism between territories and destinations. There is need here to support the implementation of regional sustainable tourism strategies by assisting regional councils to draw up their regional development plans (for French: PDR), and to adopt an approach to tourism that offers travelers the opportunity to visit a variety of attractions along a themed corridor.