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The transition of governance approaches to rural tourism in Southern Morocco

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Abstract

In the Global South traditional hierarchical steering modes are still quite widespread. The significantly changing conditions of competition in recent decades have boosted the need for innovation in tourism. As such, the core challenge for tourism development in many countries of the Global South has been to attain an innovation-based orientation by using stimuli from destination governance. This article is an attempt to analyse the factors that might facilitate the diffusion of an innovation-based orientation. As a basic hypothesis, the article adopts the "counter-flow principle", with exchange between different spheres as stimuli for innovation. Taking the Souss-Massa region in Southern Morocco as a case study, the paper describes an analysis of the positions of public and private stakeholders as well as civil society organisations. The main question is what kind of relationship between the stakeholders would foster effective governance processes among local, regional and (inter-)national stakeholders. One of the major constraints seems to be that existing public governance conditions concerning the fostering of private activities limit the implementation of an innovation-oriented range of rural tourism options. The paper then examines such limitations and constraints of existing governance structures, which lead to the suboptimal performance and effectiveness of (mainly) top-down approaches.

Keywords**:** destination governance, rural tourism, Morocco

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Tourism governance approaches in the Global South

Since the turn of the century in many countries of the Global South, rural tourism has become a new product line, complementing traditional coastal tourism resorts and cultural tourism opportunities (often as round-trip tourism). The innovative development of this new line of products and services has created a challenge for traditional steering modes, which were developed with large national and international players during the Fordist phase of mass tourism. Nevertheless, specific results concerning the development of successful, innovative choices in rural tourism as well as the implementation of substantial innovative sustainability management strategies are rather limited in most countries of the Global South.

The relationships and interactions between governmental authorities and local and regional stakeholders in the Global South have often continued to be marked by post-colonial top-down hierarchies. Moreover, the often-iterated interaction procedures that are undertaken in industrialised countries as a matter of course (Revermann & Petermann, 2003, p. 98 et seq.) are often lacking in countries of the Global South (Mowforth & Munt, 2003, p. 255 et seq.). Approaches to tackling the diverging trade-offs between economic, social and ecological aspects – which are usually rather well established in industrialised countries (Biedenkamp & Garbe, 2002, p. 2) – are lacking in many countries of the Global South. Major national and international tourism professionals are often only interested in societal and environmental concerns outside their direct reach to a limited extent (see Burns 1999, 2004). At the same time, the need for good governance in tourism is often acutely felt by the different stakeholders, who have been looking for new ways of interaction within the "ecosystem" of the stakeholders involved.

According to a typology of governance structures posited by Michael Hall (2011, Figure 1) regarding steering modes and actors, the tourism sector of many countries in the Global South can be described by characteristics of the "Markets" mode. From a governance perspective, the structure of the tourism sector is characterised by a predominance of large private actors. National and international hotel chains provide the accommodation facilities in many coastal resorts, as well as at famous heritage sites and in metropolitan tourism destinations – often with international hotel chains dominating the market. In addition to the accommodation sector, the market has been characterised by the dominance of international tour operators as well as national and international flagship carriers.

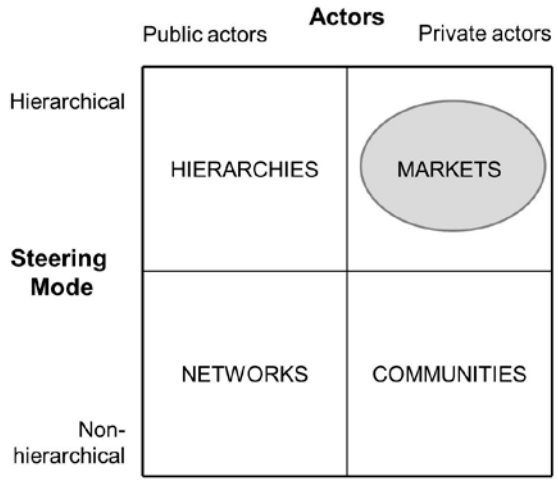

Figure 1. *Typology of governance structures (Source: Own design following Hall, 2011, p. 443)*

In another typology classifying governance approaches, Bodega, Cioccarelli & Denicolai (2004) used two dimensions as well to characterise organisational structures in destinations. Their "Centralisation" dimension corresponds closely to Hall's hierarchical/non-hierarchical axis (steering mode). They also noted the relevance of the density of the interaction between the stakeholders, and made this their second dimension (Figure 2). Following this matrix, many tourism sectors in the Global South (see, e.g. Kagermeier & Kobs, 2013) can be characterised by the "Governed Model", with a high degree of centralisation among only a few large private stakeholders and with a low degree of interaction between the different stakeholders. The role of the public sector is often mainly limited to guaranteeing the quality of the general conditions concerning infrastructure and promoting the country as a whole in a

rather general way, using image campaigns conducted by the national tourism marketing organisations.

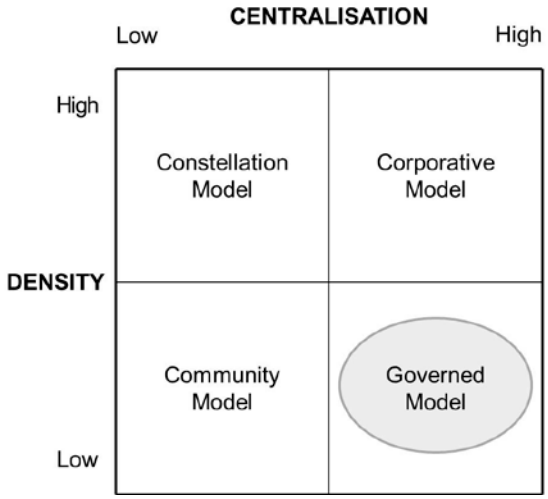

Figure 2. *Matrix of organisational positioning (Source: Own design following Bodega, Cioccarelli & Denicolai 2004, p. 17)*

This corresponds to what – from a governance perspective of destination management – Flagestad & Hope (2001; see Figure 3) described as the "Corporate Model". A destination which is characterised by the Corporate Model approach of governance is dominated by few major international and national private stakeholders (hotel chains and tour operators), with only minor roles played by local and regional tourist boards as well as by the public sector (in its governing capacity). This stands in contrast to the "Community Model", where a multitude of small local and regional private stakeholders need comprehensive destination marketing and management organisation, as well as public stakeholders who can assume the leadership role in a destination (see Beritelli & Bieger, 2014 or Kagermeier, 2014a). It has been hypothesised that to foster rural tourism with a multitude of small private stakeholders, the Community Model would seem more appropriate, by incorporating smaller stakeholders with regard to their (often limited) competences and resources (Kagermeier & Kobs, 2013; Kagermeier, 2014a).

Up until now, discussions about the role of governance modes on the destination level have mainly been held in the Global North. A core thread of the discussion has been developed by Pechlaner and his network partners. They focused on the importance of delimitating regional entities, which, from the perspective of post-Fordist tourists, meet the criteria of a single individual destination and which facilitate the active development of the destination; here, destination management organisations (DMOs) play a central role (Pechlaner, Raich & Fischer, 2009, Pechlaner, Volgger & Herntrei, 2012). The regional core competencies (Pechlaner, Fischer & Hammann, 2006b) are only developed to a small extent. Stakeholders' strategic

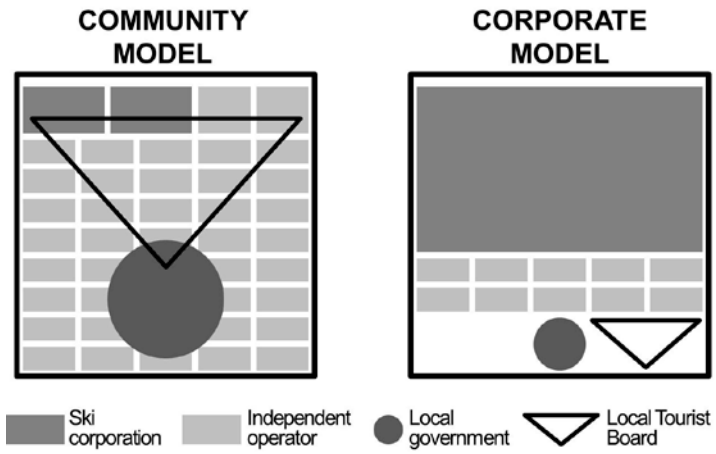

Figure 3. *Ideal types of organisational structures in Destination Management: The Community Model and Corporate Model (Source: Own design following Flagestad & Hope, 2001, p. 452)*

orientations can generally be described as "defenders" and "reactors". The role played by leaders in fostering innovative approaches is particularly noteworthy (Pechlaner, Hammann & Fischer, 2005; Pechlaner, Fischer & Hammann, 2006a; Pechlaner, Volgger & Herntrei, 2012). Pechlaner & Volgger pointed out "the importance of the structural and procedural conditions" (2012: 926) for successful local and regional cooperation. At the same time, the role of regional DMOs could be reinterpreted as that of facilitators and mediators in cooperation, and cooperative governance (Pechlaner, Raich & Kofink, 2011) with private entrepreneurs working to achieve innovative developments.

Another line of discussion has been developed by the "St. Gallen School" of destination management (see, e.g. Reinhold, Laesser & Beritelli, 2017 or Reinhold, Beritelli & Grünig, 2018) with a primary focus on destination management and organisational aspects in Switzerland. So far, however, little emphasis has been placed on the question of destination governance aspects in the Global South (but see, e.g. Kagermeier & Kobs, 2013).

In sum, it can be concluded that an innovation-based orientation is seen as a means to meeting the challenges of competitiveness in a global tourism economy. Each tourism player seeks productivity and quality through innovation schemes. Nevertheless, an integrated and coordinated approach among actors is still missing in many places. Today, good governance involves:

- a clear definition of actors' roles and responsibilities;
- collaborative networks to avoid gaps and duplication of effort;
- the involvement of all actors;
- a medium-term and a long-term strategy.

The following section analyses the governance structures in Moroccan tourism. However, tourism policies cannot be understood separately from general political conditions, so the next step is to sketch the development of general governance approaches in Morocco.

The development of governance approaches in Morocco

The Kingdom of Morocco (which had never been part of the Ottoman Empire) came under the colonial influence of European nations at the end of the 19th century. In 1912, Morocco became a French protectorate until its independence in 1956. As in France, the protectoral government structures were quite centralised and at the same time marked by military conquest, with the so-called "pacification" of the southern parts of the country followed by the establishment of a military administration (Kagermeier, 2012). Apart from traditional tribal self-government, no formal democratic structures with elected representatives were introduced on the local or regional level. In fact, the first democratic elections on the local level only took place in 1976 (Rais, 2017). In the mid-1960s, the first attempts to decentralise these government structures were established. Decentralisation in the Moroccan context meant that, by creating new provinces as subdivisions of existing ones, new provincial offices of the central government in the new provincial capitals were created, bringing the central power closer to the people. The main motivation for this can be seen as refining the structure of oversight. But in addition to a provincial office of the Ministry of the Interior as the central tutelage institution, other offices were set up as well. These included not only offices of the Ministry of Agriculture and other ministries, but the provincial delegations of the Tourism Ministry as well. The number of provinces shot up from 16 in 1960 to 40 in 1985 (Kagermeier, 1990). By 2015, the number rose further, to a total of 63 provinces and 10 prefectures (the corresponding administrative level in metropolitan areas), which are shown in Figure 4.

A significant first step towards so-called "regionalisation", which can be seen as a starting point to changing the governance structures from top-down to counter-flow principles, can be seen in the creation of 16 economic regions in 1997 (Benyahya, 1998). These 16 regions (to a certain extent based on the initial 16 provinces) were primarily ruled by a new top-down oriented administrative level – the so-called "Wilayas". However, the first elements of democratic regional bodies, elected Regional Councils, were also

established, though their range of action was limited to a few certain economic aspects. Nevertheless, for the first time, the regions were acknowledged as "territorial collectivities" ("collectivité territoriale"; Rais, 2017).

After the "Arab Spring", the speed as well as the intensity of the decentralisation and democratisation process in Morocco accelerated. In a speech on 9 March 2011, King Mohamed VI launched a new step towards a more comprehensive regionalisation by announcing what he called "advanced regionalisation" (régionalisation avancée; Rais, 2017). In the new constitution of 2011, the regions were given the designation of autonomous public bodies (Royaume du Maroc, 2011, Article 135: "constituent des personnes morales de droit public et gèrent démocratiquement leurs affaires"). Specifications defining the former economic regions as well as a comprehensive reorganisation of their tasks was presented by a commission appointed by King Mohamed VI at the end of 2011 (Royaume du Maroc, Commission consultative de la regionalisation, 2011). After a protracted debate, 12 new regions were established in 2015 (Figure 5); they were given the task of dealing with economic development, continuing education and rural development (Rais, 2017, "le développement économique, la formation

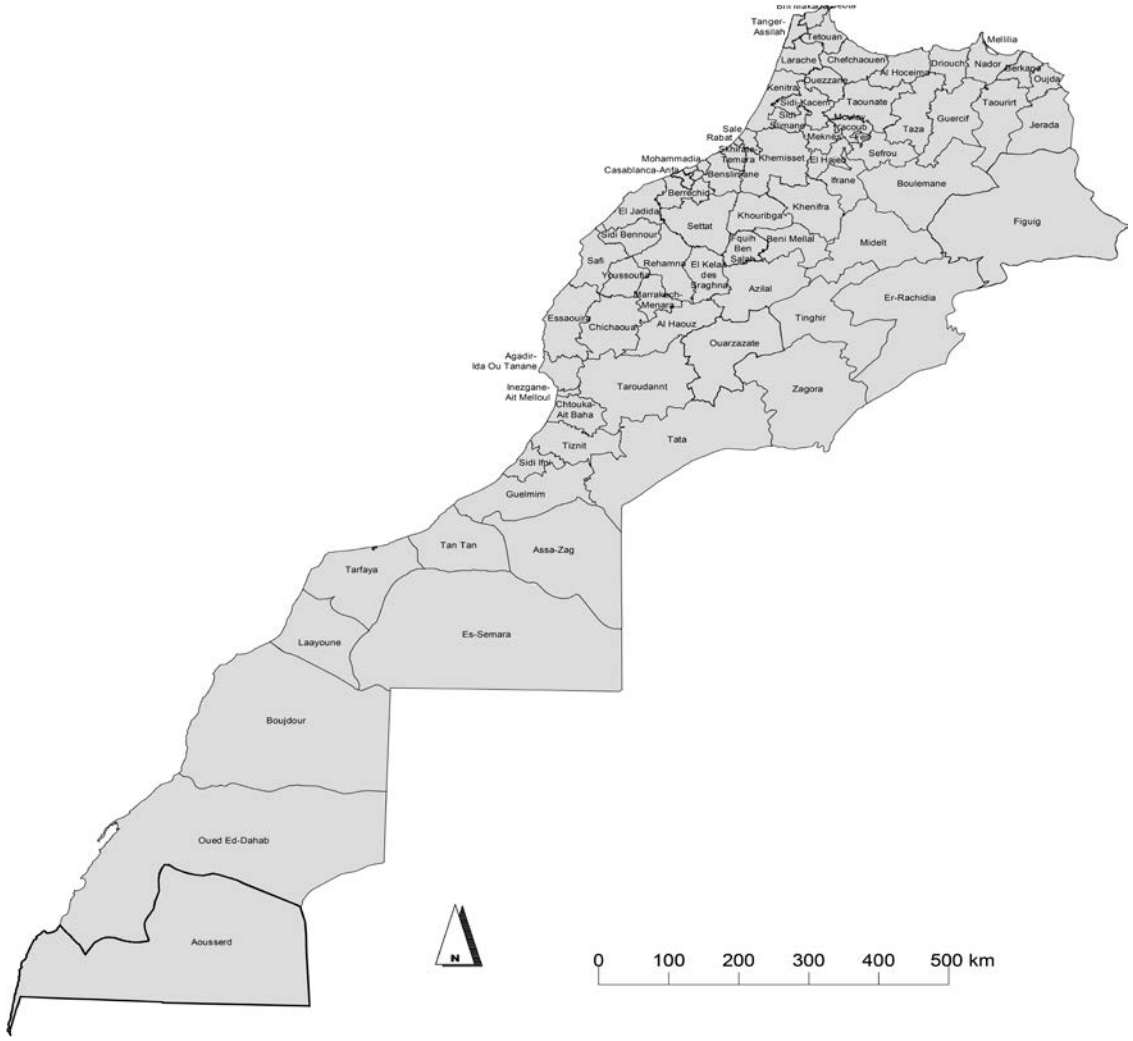

Figure 4. *Provinces and prefectures in Morocco in 2015 (Source: Own design following Zaireg, 2015)*

continue et le développement rurale").

This short sketch shows that after independence during the second half of the 20th century – to a certain extent a legacy of the colonial period as well – some basic aspects of the political governance approaches in Morocco were still marked by the top-down orientation of a rather authoritarian governance model. In recent years, however, some tendencies towards a more counter-flow oriented decentralisation governance model can be identified, even if these beginnings have still not yet been implemented to the full extent. The next section analyses governance approaches in the tourism sector specifically, which naturally reflect the overall conditions of the general political setting.

Development of tourism governance approaches

Since its independence in 1956, the tourism policy of the case study of Morocco has been driven by the perception of tourism as a means

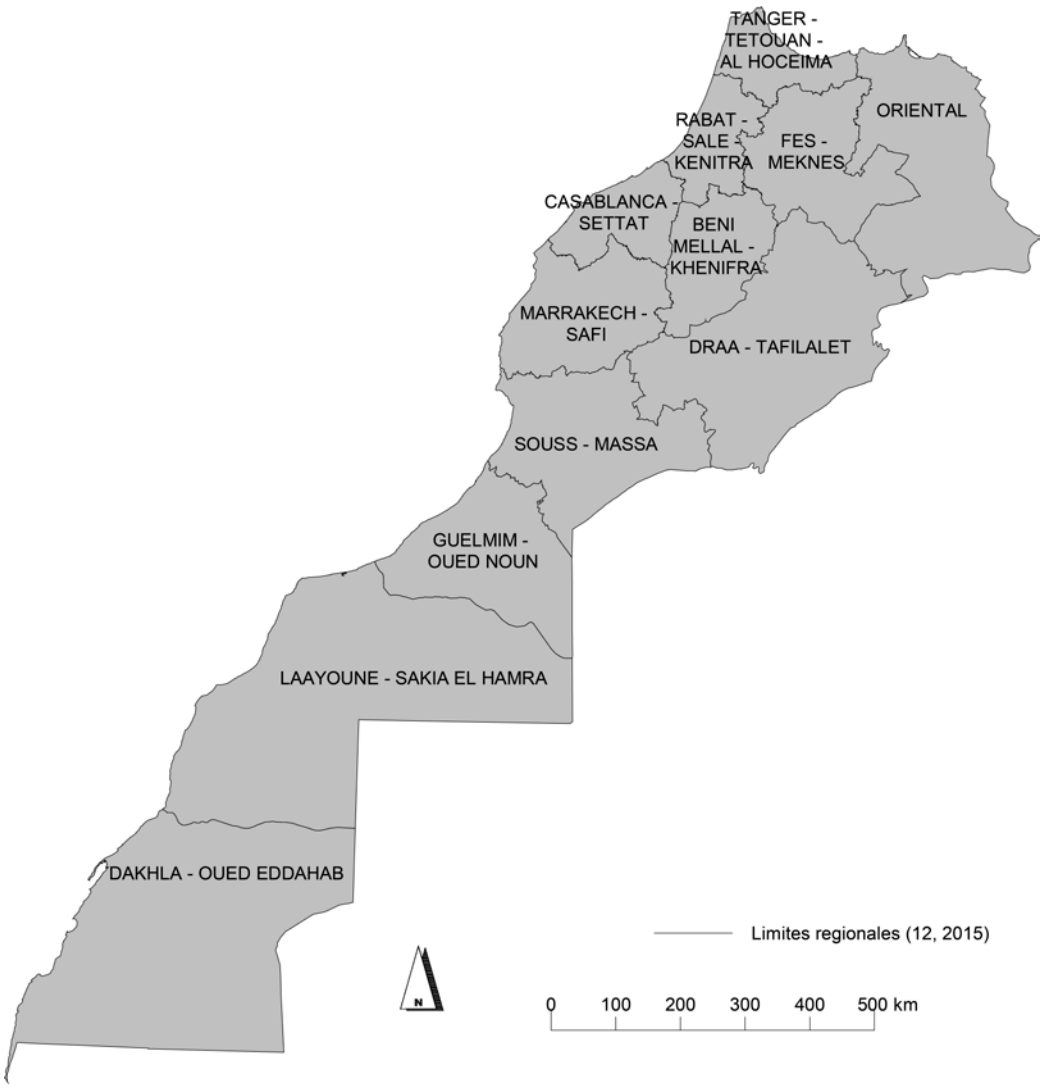

Figure 5. *The "new" regions of Morocco, since 2015 (Source: Own design following Zaireg, 2015)*

of generating foreign exchange, thereby reducing the trade deficit as well as creating employment opportunities. Therefore, the main focus has been on incoming tourism from abroad. Following the product lines already implemented during the colonial period, the tourism portfolio of Morocco has traditionally been characterised by three relatively equal pillars since its beginning:

1) Beach tourism (especially in the area of Agadir);
2) Culture-oriented city tourism (especially in the "Imperial Cities" such as Fes, Meknes and Marrakesh);
3) Round-trip tourism (in the south of the country along the "Road of the Kasbahs", Kagermeier, 2014b).

Tourism governance approaches until the end of the 20th century

Even during the colonial era, the central government played an important role in a relatively hierarchic governance structure, and this basic, primarily top-down, orientation continued in the first decades of independence until the 1980s. This was not only reflected by the fact that both tourism-focused institutions dating from the colonial period, the "Office National Marocaine du Tourisme" (ONMT), a marketing organisation for internationally incoming tourism, and the "Crédit Immobilier et Hôtelier" (CIH), a means of facilitating private investments by offering loans at reduced interest rates, continued to exist after independence. Just as at the beginning of tourism development in the 1920s and 1930s (Kagermeier, 2012), the central government continued to act as a direct investor in state and semi-state accommodation infrastructure – partially via the national railway company (the "Office National des Chemins de Fer" (ONCF)) as well as via the "Société Marocaine de Développement touristique" (SOMADET). It also provided financial means via the CDG ("Caisse de Dépôt et de Gestion"), a state-owned financial institution providing long-term loans. Since 1965 in particular, with the creation of a tourism ministry (CRAM 1996, p. 679), Morocco has recognised the importance of tourism as an economic sector for the country. Apart from the central institutions in the capital, provincial offices of the national ministry responsible for tourism were established, mainly as tutelageand oversight institutions to assure the observance of technical norms and to collect data on the occupancy of hotels (Figure 6).

The delegates in the provincial office were sent by the central government for a certain period of time. Like diplomats, they were usually replaced after a few years and returned to the central ministry, or were sent to other provinces. This system meant that their role as provincial promotors of tourism development activities was quite limited due to their weak local and regional rootedness. After the late 1970s, the state-owned hotels were

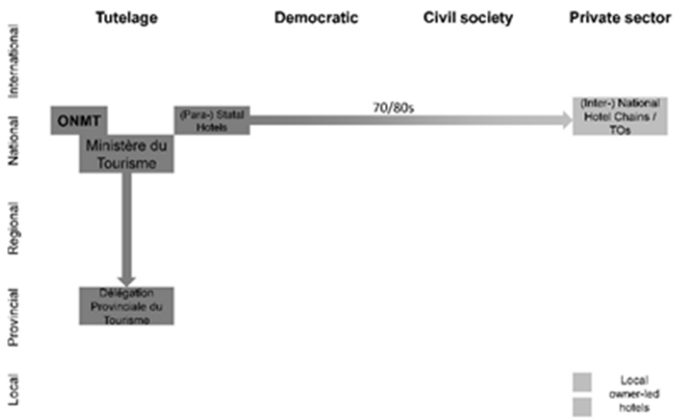

Figure 6. *Governance-related stakeholders in Moroccan tourism until the 1980s (Source: Own design)*

successively sold to international and national private hotel chains, and the central government began to withdraw from direct operational activities (partially by its own will, in light of the fact that the initial phase of tourism development had been accomplished, and partially as a result of the intervention of international financial institutions and donors to reduce debts and give way to privatisation). The hotel market has been dominated by national and international hotel chains and tour operators ever since. Smaller private owner-led hotels have played only a minor role (mainly in the major cities).

With respect to the governance models presented in Section 1, the traditional Moroccan tourism product with beach tourism and cultural urban tourism in the Imperial Cities demonstrates – regarding steering mode and actors – characteristics of the "Markets" typology of Hall (2011, see Figure 1). According to the two dimensions of "Density" and "Centralisation" used by Bodega, Cioccarelli & Denicolai (2004, see Figure 2), the situation in Morocco demonstrates an almost-ideal type of a "Governed Model", with destinations that represent more the "Corporate Model" of Flagestad & Hope (2011, see Figure 3).

The first steps towards a more regional focus during the middle of the 1990s were reflected in the tourism sector by the establishment of regional offices of the central tourism ministry (with more or less the same objectives and functions as the provincial offices; see Figure 7). Reflecting the first tentative steps towards bottom-up representation of the overall governance approaches in the tourism sector, the regional tourism delegations created "Groupements Régional d'Intérêt Touristique" (GRITs) and invited representatives of hotels, tour operators and tourism agencies to participate in them. It was mainly representatives of major national and international chains and enterprises that were represented in this circle. From the beginning, a discussion within the GRITs had been that they could not have access to sufficient funding originating from a clearly defined source. This has meant that their role has been quite limited, because they have not been able to carry out larger infrastructure projects or marketing activities using their own resources. Later, the GRITs were replaced by the "Conseils Régional du Tourisme" (CRT) (Berrissoule, 2002), and thus are not shown in Figure 7. For a long time, cooperation on international development programmes focused on agricultural projects. Since the 1990s, however, more and more international donors

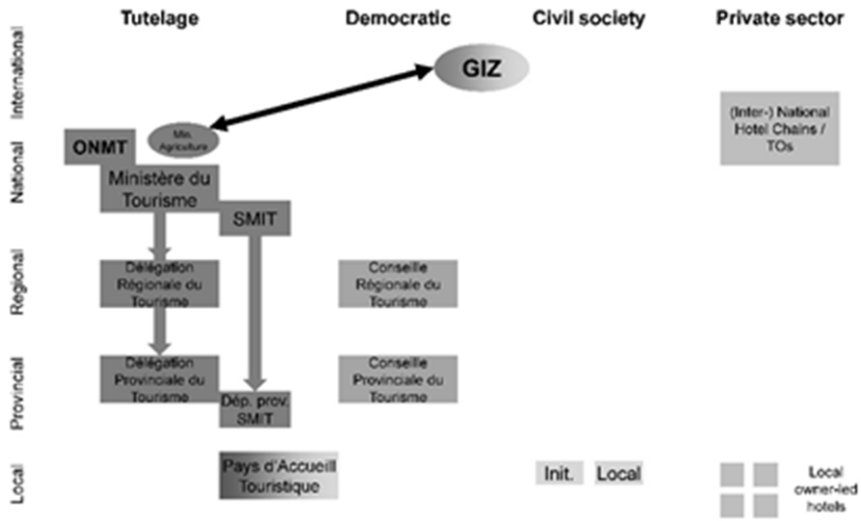

Figure 7. *Governance-related stakeholders in Moroccan tourism after 2000 (Source: Own design)*

(symbolised by the representation of the German GIZ in Figure 7) have turned their activities towards tourism as an alternative income-generating activity in rural areas. Most of the time, these projects (such as the GIZ's Argan Project in the Souss-Massa region in Morocco; GIZ, 2007; Hayer, 2006 or El Fasskaoui, 2009; Amzil, 2009) were undertaken in cooperation with the Ministry of Agriculture (see Figure 7) or the Administration for the Protection of the Natural Environment (Haut Commissariat aux Eaux et Fôrets; see Figure 9), and rarely in close interaction with the Ministry of Tourism. As such, the intervention of development agencies should be understood as another stakeholder on the stage, who is only partially involved and who has adjusted to previously existing approaches. By the end of the 20th century, Moroccan tourism governance structures were still marked by a traditional top-down orientation coming from the centralised administration, albeit with a view to tentative initiatives on the regional level as well as by international organisations.

Vision 2010

After the turn of the millennium, the tourism sector was assigned a significantly greater importance by political leaders. This is reflected in the so-called "Vision 2010" (Royaume du Maroc 2001, 2013b), a tourism strategy that aimed to significantly increase the number of tourists to 10 million by 2010 (Royaume du Maroc 2001, p. 5). The driving forces for this intensive reorientation towards tourism development was neither particularly demand nor supply-driven, but can be seen as a result of the will to increase the overall economic effects of tourism in the national economy, as the most important contributor to macroeconomic balances, the second-largest contributor to national GDP and the second-largest job creator (Royaume du Maroc, 2013b). This focus on the outcomes of the tourism industry favoured large-scale investments (under the name "Plan Azur"), mainly in six beach resorts and the Imperial Cities (for more details, see, e.g. Kagermeier, 2014b). The "Open Sky" EU-Morocco Aviation Agreement, which came into force in 2006, must be understood in the context of the growth orientation of Vision 2010. The aim to increase the number of tourists by facilitating accessibility with more Moroccan and European (low-cost) carriers offering flights to Morocco was fulfilled, significantly increasing arrivals (IATA, 2009, p. 27; Schlumberger & Weisskopf 2012, p. 276 et seq.). Even though the governance approach was not explicitly mentioned in the original text of the Vision 2010 (Royaume du Maroc 2001), in a later, abridged version of the tourism strategy, various milestones of a new governance approach became clear. These included:

- the modernisation of the ONMT,
- the creation of the Moroccan Society of Tourism Engineering (SMIT) by the Ministry of Tourism as its operational arm,
- the creation of the Tourism Observatory, and
- the creation of the Regional Councils for Tourism (Royaume du Maroc, 2013b).

Although the first tentative steps towards a more decentralised and regionalised governance approach had already been undertaken at the overall political level at the end of the 1990s, the governance-related elements of the Vision 2010 tourism strategy were still very much concentrated in agencies of the central government. Apart from the intended modernisation of the national tourism marketing office (ONMT), two new institutions on the national level were created. The smaller one, the Tourism Observatory, was designed to collect various statistics on tourism and conduct corresponding analyses. The creation of the SMIT (with its provincial offices) served as an executive body, conducting feasibility studies, guiding the development of regional master plans, and attempting to facilitate tourism investments (SMIT, 2018). In this way, another stakeholder from the national level began to intervene on the other spatial levels.

At the same time, a certain level of disengagement by the public sector cannot be overlooked. Even though the public sector increased its structural presence, the operational task of creating infrastructure and promoting the Moroccan tourism product has to a great extent been given to (mainly international) investors. Since the turn of the millennium, tourism development has been characterised to a great extent by real estate

aspects (and sometimes even speculation; Berriane, 2009, p. 267) in the coastal resorts and the Imperial Cities.

Nevertheless, with the Regional Tourism Councils (replacing the former GRIDs), democratically legitimised bodies were created, strengthening the bottom-up element in tourism policy. However, the creation of new bodies did not lead to any reduction in the responsibilities or tasks of the top-down tutelage regional or provincial tourism ministry offices. This was quite typical for the steps that followed steps as well. While the second half of the 20th century had mainly been characterised by the elaboration and installation of increasingly refined and sophisticated tutelage structures, the first two decades of the 21th century saw the rise of democratic and more bottom-up initiatives. But these new stakeholders did not replace or reduce the top-down oriented stakeholders; they were simply added to the system of stakeholders. This often created obstructions between the different types of stakeholders, as no clear task sharing had been implemented. As a consequence, parallel structures were established, with different stakeholders dealing with sometimes more or less the same tasks and without any clear assignments concerning their relationships.

In addition to the main orientation on coastal resorts, the Imperial Cities and internal tourism, Vision 2010 put a certain amount of focus on the fostering of rural tourism. Therefore, the establishment of destination management organisations (DMOs) as a central steering instrument was considered useful. Based on the French model (Henry, 1995), the creation of “Pays d'Accueil Touristiques” (PAT) was proposed (Royaume du Maroc, 2002, p. 144 et seq.). The basic principle behind the approach was the fact that in rural areas, individual attractions usually do not have enough individual appeal to attract international tourists in particular. Similar to Germany, for example, it was also important in Morocco’s rural areas that larger territorial units could join together in a common product development and marketing platform. One key aspect of a regional DMO is that, within the framework of internal marketing, all relevant actors are involved, so that both private tourism service providers and the relevant public institutions (e.g. nature or national park administrations), as well as political actors and the population in general all share in the development of tourism on the basis of a coordinated catalogue of objectives, as characterised by Flagestad & Hope (2001; see Figure 3).

A study commissioned by the Moroccan Ministry of Tourism with the backing of the United Nations World Tourism Organisation (UNWTO) outlined the relevant and necessary aspects of the field of activity of a DMO:

- The development of corresponding product lines for active tourism, including the creation of the necessary tourist infrastructure (e.g. hiking trails, signage);
- The initiation of appropriate catering and accommodation choices;
- Quality assurance or certification; and
- The transfer of destination-related market communication (Royaume du Maroc, 2002, p. 148 et seq.).

"Maisons de Pay" were also supposed be created as a central nucleus for rural destinations. On the one hand, these should have served as a point of contact and information for visitors, just as a national park centre would, but on the other hand, they should also have been a showcase for the region and its regional products (Royaume du Maroc, 2002, pp. 148 et seq.). In addition, the need for “capacity building” to create the necessary tourism-specific know-how among the rural stakeholders was also made clear (Royaume du Maroc 2002, pp. 185 et seq.), as well as a stronger institutional presence with its own agency (Royaume du Maroc, 2002, pp. 175 et seq.). The study also made reference to the need to provide adequate financial resources (Royaume du Maroc 2002, pp. 192 et seq.). In addition to the direct promotion of infrastructure measures that would not be immediately profitable, these were also to be used to lend to small investors, who, unlike large-scale hotel investors, had only limited access to traditional capital sources.

Even though the rural tourism strategy seemed like some kind of appendix in Vison 2010, it nevertheless induced quite a few activities

among small private stakeholders and local civil society initiatives in different rural areas to construct guesthouses or develop hiking routes. Two Moroccan experts even spoke of a certain "fever" (Berriane & Moizo, 2014, p. 21) in rural regions. But almost 20 years after the start of the rural tourism initiatives, the balance has been quite disillusioning. The central weaknesses of the attempt to stimulate rural tourism in peripheral regions can be found on the side of the public sector as well as among the private stakeholders involved. On the side of the public stakeholders, it is possible to observe:

1) a traditional hierarchical attitude characteristic of an authoritarian state,
2) an orientation towards major investors from outside the region, and
3) a lack of awareness among public stakeholders of the need for governance structures.

Small private stakeholders attempting to engage in rural tourism often demonstrate

4) a lack of the necessary capabilities to successfully run a tourism business, and
5) the absence of any cooperative structures to tackle their individual weaknesses.

This means that innovation-based approaches that try to guide and facilitate the tasks of small private accommodation owners have not really been pursued by the central public institutions; this in turn leaves certain weaknesses in the rural tourism segment. Although NGOs have attempted to intervene in some cases to compensate for the deficits in the public steering role, their effect has been quite limited (for more details, see Berriane & Aderghal, 2012, Berriane & Moizo, 2014 or Kagermeier, 2014b). One of the few examples where a grassroots NGO was established and has had a significant impact is the "Réseau de Développement du Tourisme Rural" (RDTR, 2012), which operates in the Souss-Massa(-Drâa) region of the country (see Section 4).

Vision 2020

In light of the weak results of the PAT concept (which to a great extent reflected the governance weaknesses and the incomplete cooperation of central tutelage institutions, bottom-up regional organisations and private stakeholders), the concept was not pursued and was quietly abandoned after 2010, when an updated version of the tourism development plan was launched (Royaume du Maroc, 2011).

The central driving force of the "Vision 2020" was more or less the same as its predecessor's: continue to make tourism one of the engines of Morocco's economic, social and cultural development ("Engagement: Continuer à faire du tourisme l'un des moteurs du développement économique, social et culturel du Maroc", Royaume du Maroc, 2014) with the central aim of doubling the role of the sector in the national economy – so once again, the tourism development approach is mainly growth-oriented. To improve the position of the country in a highly competitive market environment, Vision 2020 has called for the application of quality management approaches as well as a focus on the diversity and authenticity of the product.

Nevertheless, Vision 2020 designated a decent demarcation of regional destinations ("territoires touristiques") for the first time. The country was divided into eight tourism regions (see Figure 8) and each destination was assigned one of three specific product orientations: seaside tourism, cultural tourism or nature tourism.

These classifications aimed to develop a consistent tourism segment and to create a region that had the necessary critical mass to achieve international visibility for the destination as a whole ("présentant la cohérence touristique, l'attractivité et la masse critique nécessaires … pour disposer d'une visibilité internationale et accéder au statut de destination à part entière" Royaume du Maroc, 2018b). Each destination would then (not totally independently, but still under the guidance of the national ministry) develop its own tourism strategy to present itself on the market.

Although the principal concept must be acknowledged as an attempt to foster (at least partially) decentralised approaches, the demarcation of these destinations does not take into account the regional structure established in 2015 (see Figure 8). This could be accepted if the 16 administrative regions did not represent a consistent type of destination.

But a closer look at the demarcations of the tourism regions and the administrative regions (which affect other ministries) makes it clear that, by overriding the administrative boundaries, the aim of demarking consistent destinations with a clear and common profile has only partially been achieved. For example, the pre-Saharan "Atlas & Vallées" could easily be considered a tourism region with a rather obvious profile. This rural tourism region, covering the eastern parts of the High Atlas as well as the river oases south of the High Atlas and the eastern parts of the Moroccan desert, with the sand dunes at Merzouga and Mhamid, should focus on nature tourism. At the same time, this tourism region corresponds to a great extent to the Drâa-Tafilalet Administrative Region. But the tourism region also comprises parts north of the High Atlas, which belong to the Beni Mellal – Khenifra Administrative Region, where a quite different tourism product is available, and thus does not really

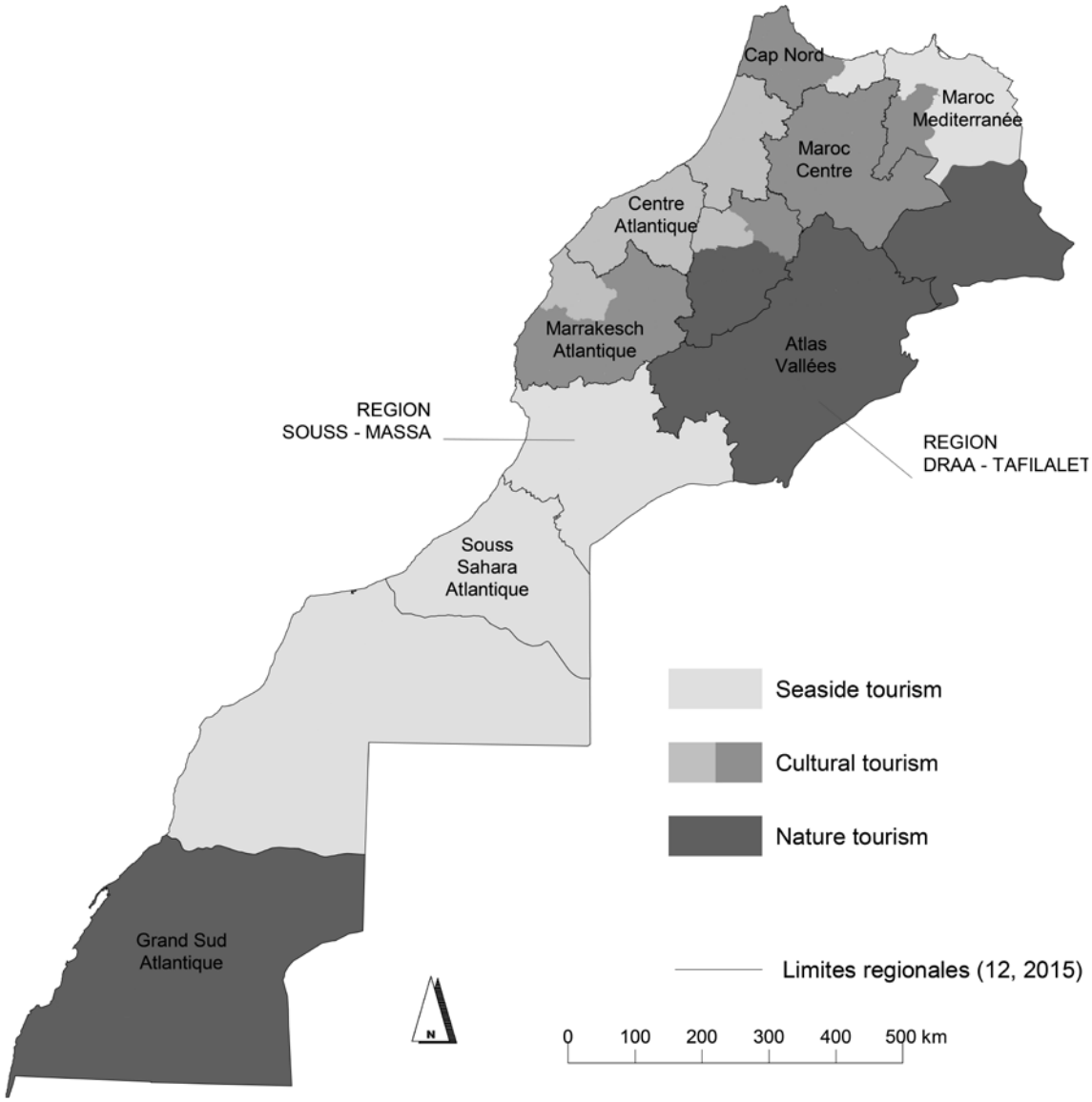

Figure 8. *Tourism territories according to the Vision 2020 tourism strategy (Source: Own design following Royaume du Maroc. Ministère du Tourisme 2013a, p. 18, with the Souss-Massa & Drâa-Tafilalet regions highlighted)*

correspond to the pre-Saharan profile. On the other side, the easternmost part of the Atlas & Vallées Tourism Region (in Figuig Province, see Figure 4) does not belong to the Drâa-Tafilalet Administrative Region. In the proposals by the Expert Commission on Regionalisation (Royaume du Maroc, 2011: 37), Figuig Province has been – due to its structural characteristics – proposed to become part of the Drâa-Tafilalet region as well, thus enabling a correspondence between administrative and tourism regions. However – perhaps for other political reasons – Figuig Province ultimately became part of the Oriental Administrative Region.

On the other side, the expert commission proposed that Al Hoceima Province become part of the Oriental Administrative Region, but this province in the Rif mountains – marked from time to time by political disturbances (Schwarz, 2018) – has been put together with other Rif provinces in the Tanger-Tetouan-Al Hoceima Administrative Region, thus again creating a gap between the tourism regions and the administrative regions without any discernible reason. This can be interpreted as an indicator that the synergy between the two central administrations dealing with regionalisation aspects might still be significantly optimised.

At the same time, the classification of tourism products to each of the tourism regions seems a little bit mechanistic and superficial. One of the most striking cases is that of the Souss Sahara Atlantique Tourism Region (see Figure 8), comprising three administrative regions. Even though the whole tourism region is supposed to focus on seaside tourism, only the Souss-Massa region (mainly around Agadir) has decent coastal resorts available. And even the Souss-Massa region includes the southern slopes of the High Atlas and major parts of the Anti-Atlas ranges, which are characterised by rural tourism in the interior – this has nothing in common with the seaside resorts of Agadir. The two other administrative regions – partly composed of the former Spanish Sahara – only show very embryonic tourism activities and most of the surface of those two provinces is covered by desert – marked more by the extraction of phosphate than by desert tourism. Therefore, it seems that the demarcation and product assignment of the tourism regions might be more influenced by political wishful thinking than by current or potential tourism development realities.

Nevertheless, the tourism regions are intended to play an important role in the tourism strategy of Morocco. The Vision 2020 document states that these will not only be subject to detailed regional roadmaps, but also given their own governance structures and dedicated financing ("Chacun des territoires touristiques est doté d'un positionnement et d'une ambition spécifiques … qui feront l'objet de feuilles de route régionales détaillées, portées par une gouvernance propre et des moyens dédiés" Royaume du Maroc, 2011: 11).

But again, this does not mean that the eight tourism regions were meant to act on their own. The national government has called for the creation of a Tourism Development Agency (Agences de Développement Touristique) for each of the eight tourism regions, whose main mission will be to guarantee the effective execution of the regional roadmaps (Royaume du Maroc, 2018a). Even though the Tourism Development Agencies have not yet been established as of 2018, they demonstrate the will of the central government to continue to intervene in regional activities as the leading key institution. At the same time, the relationships between the level of the tourism regions and the different bodies at the administrative level or with the SMIT is not yet clear (Figure 9).

As one Moroccan colleague tentatively concluded concerning the current situation of regionalisation and the mitigation of top-down approaches in Moroccan tourism policy as reflected in Vision 2020: "Even though other actors are able to participate in crafting tourism policy, one has to state that the Ministry of Tourism is still responsible for the entire mission, up to the present day" ("Même si d'autres acteurs peuvent être une partie prenante dans la politique touristique, on constate que c'est au ministère du tourisme que revient, jusqu'à nos jours, la totalité de la mission" Lazhar, 2015: 257). Official approaches as articulated in Vision 2020 have

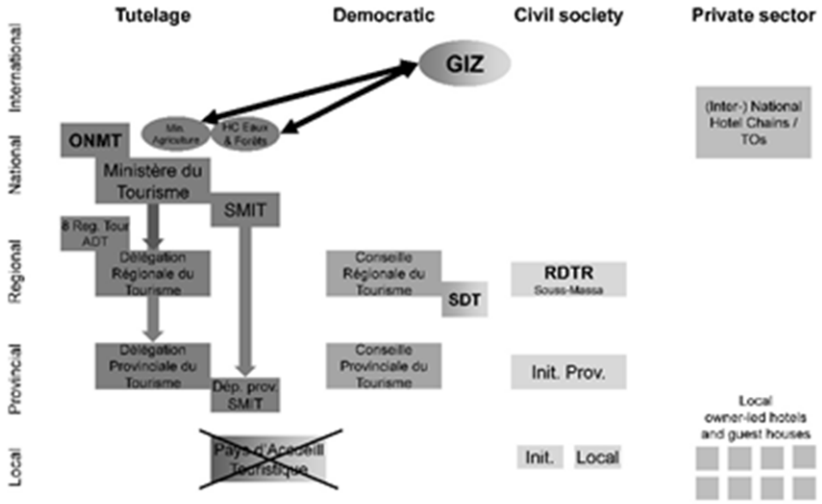

Figure 9. *Governance- related stakeholders in Moroccan tourism 2018 (Source: Own design)*

not accounted for the increasing number of small private investors in rural tourism.

Local and regional bottom-up initiatives by civil society

Even though the tendency to maintain a centralised, hierarchical steering mode has stayed strong on the national level despite all the proclamations and a few tentative steps, in recent years, bottom-up initiatives have nevertheless arisen – especially since the Arab Spring.

Activities by Civil Society: the RDTR

The most comprehensive and best-performing example has been development in the Souss-Massa-(Drâa) region. As the most advanced example of good practices for rural tourism in Morocco, it is important to discuss the activities of different stakeholders in this region around the regional capital Agadir in greater detail.

The region's focus on rural tourism since the turn of the millennium has meant that a rather large number of small private stakeholders have taken the initiative to establish accommodation facilities in rural areas of Morocco (see Figure 9). As discussed in Section 1, the conditions for rural tourism differ quite significantly from the Fordist "Markets" type described by Hall (2011), the "Governed Model" of Bodega, Cioccarelli & Denicolai (2004) and the "Corporate Model" shaped by Flagestad & Hope (2001). Rural tourism is often characterised by a multitude of small stakeholders, which – especially in the Global South (Kagermeier & Kobs, 2013; Kagermeier, El Fasskaoui & Amzil, 2018a) – often lack market access, know-how and financial resources. Insofar as the PAT approach for rural tourism did not succeed in integrating small-scale local stakeholders, and as the main focus of the Vision 2010 and Vision 2020 tourism strategies was on traditional national and international investors of hotels (and hotel chains) in the Imperial Cities and the development of beach resorts, the needs of small rural stakeholders were only met rudimentarily. In light of the lack of public DMOs, caring for the needs of small stakeholders in rural tourism and the need for cooperation to promote the rural tourism product, the feeble performance (especially very low occupancy rates) documented by Berriane & Moizo (2014: 12) has demonstrated that the rural tourism product has not been a "perpetual motion machine", but needs comprehensive and substantial framing and backing by some kind of regional management and marketing body. While the internet and especially the different booking platforms (including Airbnb) have significantly facilitated the direct market access of small stakeholders in the Long Tail (Anderson, 2006), improving

the direct marketing of small tourism stakeholders in Morocco as well (Popp & El Fasskaoui, 2013) with positive effects on the value chain, this has only reduced the need for comprehensive destination management bodies slightly, because the rural tourism product consists of a bundle of different services, and the accommodation provided by private stakeholders form only one aspect of this (Kagermeier, El Fasskaoui & Amzil, 2018b).

To tackle this weakness, quite a few NGOs were founded as associations in different parts of Morocco (Berriane & Moizo, 2014: 5). Most of them had only a limited local scope and performance, even folding or becoming inactive after a certain period of activity. The most comprehensive and best-performing example of an association has been the RDTR (Réseau de Développement du Tourisme Rural) in the Souss-Massa(-Drâa) region. This private initiative was founded in 2011 by small-scale tourism professionals and academics as a reaction to the weaknesses of public governance in rural tourism in the Souss-Massa-Drâa Administrative Region. After the reorganisation of the administrative regional levels in 2015 (see Section 2), the RDTR separated into a core Souss-Massa section as well as a Drâa section (which is still searching for an identity). At the same time, the network received the backing of the democratic Regional Council. The main goal of the RDTR has been to bring together small-scale tourism stakeholders in the rural areas of the region in order to structure and organise the rural tourism sector, organise and manage their common interests, facilitate the practices of rural tourism as an industry (promotion, communication, marketing assistance), promote the exchange of good practices, ensure the quality of rural tourism products, contribute to the development of a sustainable and responsible form of rural tourism and build partnerships with other regional, national and international tourism stakeholders (RDTR & Afkar, 2013: 6). With its focus on small private stakeholders, the RDTR has been able to launch a comprehensive programme for an unprecedented, innovation-based orientation to rural tourism.

The RDTR realised that the only way to improve the performance of small-scale private tourism activities was to build a network that focused on capacity building and that would provide the service orientation necessary for successfully participating in the global tourism market. Therefore, the RDTR formulated five strategic pillars:

1) The consolidation of the institutional capacity of the RDTR itself;
2) The creation of comprehensive experiences for tourists;
3) Supervision and training;
4) Eco-certification;
5) Promotion and marketing (RDTR, 2012: 5 et seq.).

Immediately after its foundation, the RDTR had already comprised about 70 members (RDTR, 2012: 4), including more than 40 tourism professionals that owned their own accommodation business (gîte, guesthouse, campsite, etc.). During the first few years, a wide range of activities were launched.

1) The consolidation of the institutional capacity of the RDTR

The first goal was internal – to build up a certain degree of institutional capacity. Therefore, with the backing of the Regional Council, the RDTR established their own office in the centre of Agadir; it employs a General Secretary who deals with routine tasks and assists the elected office holders, who serve voluntarily. Building institutional capacity means fulfilling the classic tasks of a public DMO according to the “Community Model” of Bodega, Cioccarelli & Denicolai (2004). This can be seen as a self-help, bottom-up reaction to respond to a gap that has not been adequately filled by the hierarchical public bodies.

Another task that the RDTR has undertaken has been to (co-)organise various workshops and conferences (RDTR, 2012: 12). Obviously, one main goal of this public relations effort has been to stimulate support among the various private and – especially – public stakeholders in the region, and thus strengthen and bolster the position of the association. At the same time, these workshops and conferences have been organised with the intention of

establishing a network with other national and (especially) international actors from NGOs, public bodies and academia. Last but not least, another intention touches on other strategic goals: raising awareness and developing professional know-how among their members, participating in workshops and conferences, which can be seen as part of the training pillar as well.

2) The creation of comprehensive experiences for tourists

Rural tourism includes a wide variety of activities in natural areas; as such, the RDTR has also focused on the development of hiking trails and explanatory signage in the countryside. At the same time, a complex rural tourism product consists not only of natural and cultural heritage (including the customs of everyday life, and traditional arts and handicrafts), but the culinary arts and sports activities as well. For this reason, the conceptualisation and internal communication of specific products and services (which also falls under "Supervision and training") can be seen as part of the product creation as well. This strategic pillar demonstrates that the RDTR has been focusing on another core task of a regional DMO, and thus has been reacting to deficits of the hierarchic public bodies, who – according to the "Community Model" of Flagestad & Hope (2001; see Figure 3) – should be taking the lead in product development.

3) Supervision and training

One thing that the RDTR recognised was that the skills and abilities of their members were limited with respect to the tourism industry; this is the case for many private actors in rural tourism in Morocco. Many of the owners of accommodation facilities (guesthouses and lodges) have had no professional training in tourism, but instead formerly worked in other economic sectors (often as temporary working emigrants in Europe). In addition to technical and manual skills, a feel for the needs of (international) tourists is necessary, so that small private entrepreneurs are able to meet the needs of visitors.

4) Eco-certification

As part of its external marketing, but as well as some kind of internal communication strategy, the RDTR even established its own eco-label (RDTR, 2012, p. 5 et seq.; RDTR, 2013), which includes quality aspects. The definition of ecological and quality standards was part of a PhD project (El Boudribili, 2014). Nevertheless, it is necessary to point out that, since the RDTR is *de facto* replacing a public DMO, the classification scheme is only open to RDTR members (and thus also functions as a point of added value for members, and provides a stimulus to join the network). Of the 48 RDTR members owning an accommodation establishment or a restaurant, 44 have been evaluated for classification. Only two establishments were excluded from the classification outright (El Boudribili 2014, p. 127). However, another weakness of private associations replacing public structures can be seen in the fact that the continuity of activities undertaken by voluntary actors cannot be assured. In this case, after a first round of certification undertaken by the PhD student in 2013, several years passed without adequate follow-up.

5) Promotion and marketing

At the same time, a number of marketing activities were started – especially via the internet, using its own site, www.tourisme-rural.ma, and other social media tools (especially Facebook; see RDTR & Afkar, 2013); these are easily accessible, and thus have low barriers to entry and do not result in high monetary costs.

In spite of these various activities, the number of members stagnated, so the optimistic hope that membership would rise from 70 to an estimated number of 200 by 2013 (RDTR, 2012: 4) was never fulfilled. It is difficult to evaluate the reasons for the stagnation of membership numbers. Perhaps the focus of the key players exercising leadership in the network had been somewhat too much oriented towards the demonstrative function of conferences. It also must be noted that the spatial focal point of the network lay in the immediate surroundings of Agadir, so perhaps the intensity of interaction decreased significantly with the distance from the spatial (and functional) core node of the network, even though officially each of the provinces in the Souss-Massa-Drâa Region was supposed to

send an equal number of delegates. Moreover, the idea of continuous quality and sustainability-oriented training has also not been carried out. A lack of human capacity as well as other interests on the part of the leading members might be a preliminary explanation for the lack of continuity in the approach of the RDTR.

Without reference to the bottom-up initiative of an eco-certification by the RDTR, the German federal enterprise for international cooperation, the GIZ (2017), started a tourism-related project in the Souss-Massa region in 2017 with the goal of delivering a new kind of eco-certification. The main partner of the GIZ was not the RDTR, but the responsible public body for natural protected areas, the "Haut Commissariat aux Eaux et Forêts et à la lutte contre la désertification" (see Figure 9). This example shows again that the multitude of stakeholders dealing with tourism in rural areas led to quite a jumble of powers, responsibilities and activities which lack any decent coordination. Often the uncoordinated initiatives interfere with the intentions of other stakeholders, and thus sometimes set the different approaches against each other.

Even if NGOs and other actors of civil society and academia have achieved some steps toward an innovation-based approach to foster tourism that is both sustainable and competitive, the preliminary conclusion is that they have not been fully able to fulfil the leadership function alone. They do not seem to be able to comprehensively compensate for weaknesses of the public sector over the long term. The public sector's role as a governance institution, providing assistance and support for small-scale private stakeholders in developing quality-based and innovation-based practices, has not yet been taken over by other private stakeholders. This leaves significant deficits in implementing innovative ideas, especially concerning capacity-building, among tourism professionals.

The new emerging role of the Regional Council

However, recently, a new stakeholder has begun to redefine its role as a key player in rural tourism development. For the first time in Morocco, changes in political conditions more generally, assigning the Regional Council a more comprehensive role, have deliberately been interpreted in the Souss-Massa region in a way that the responsibility for tourism development might be taken over by democratically legitimised regional bodies.

For the first time in the history of the ITB (Internationale Tourismus Börse), the Souss-Massa was the only administrative region (not the official tourism region!) with its own stand in Berlin in March 2018 (Région Souss Massa, 2018). All other tourism regions were still represented as sub-presenters at the stand of the ONMT.

During a fact-finding mission by the authors in spring 2018, it became clear that this presentation at the ITB was only the tip of the iceberg, demonstrating that the Regional Council has the will to engage more intensively in tourism development. The (central body) SMIT had intended to create a regional tourism development agency (SDR – Société de Développement Régional du tourisme) for the (administrative) Souss-Massa region (not the greater tourism region; Rial, 2016) in 2016. Insofar as the Regional Councils were tasked with the responsibility of economic development after the launch of the "advanced regionalisation" (see Section 2), this intention was criticised by the regional bodies in the Souss-Massa region. In late 2017 as the first (administrative) region, Souss-Massa Regional Council started the groundwork to create a tourism SDR, with the Regional Council as the primary responsible body. Contrary to the intention of the SMIT to promote an investment-oriented regional agency, the intentions of the Regional Councils have been more oriented towards a tourism management agency, fulfilling the objectives typical of a regional DMO.

To balance the interests of the public bodies of the central government and the regional bodies, it was planned that both would be represented as shareholders of the SDR. In autumn 2017, a proposal was presented with six shareholders, three of them regional:

- The Souss-Massa Regional Council (Conseil régional Souss-Massa, 34%),

- The Agadir Municipality (Commune urbaine d'Agadir, 8%),
- The Handicraft Organisation (Maison de l'artisan, 10%)

and three representing central government bodies:

- The National Tourism Marketing Organisation ONMT (30%),
- The executive arm of the tourism ministry, the Moroccan Society of Tourism Engineering (SMIT; 8%),
- A state-owned financial institution (CDG – Caisse de Dépôt et de Gestion; 10%) (Saber, 2017).

Even though the Regional Council would be the biggest shareholder according to this model, it would not possess a majority of the shares. Nevertheless, the three regional shareholders would represent a majority. This can therefore be seen as an attempt to reconcile top-down and bottom-up impulses. However, the creation of the SDG has been shifted multiple times – probably reflecting internal discussions among the regional and central stakeholders on their role in the SDR and the role of the SDR itself (Nakhli, 2017). And even after the principle decision of the Regional Council in April 2018 (Le Matin, 2018) to establish a SDR, discussion among the different stakeholders involved continued (Boursenews, 2018; LNT, 2018) and are still ongoing (Conseil Régional Souss-Massa, 2018).

At the same time, the RDTR has not been officially integrated in the activities around the SDR, even though some key players of the RDTR have been involved in an indirect and informal way. This means that one of the key questions is to what extent the tourism professionals will be integrated in these new activities and to what extent the needs of small-scale private owners of accommodation facilities will be respected. The relationship between the RDTR and the nascent SDR has still not been clearly defined. However, the strategy of the SDR at first sight seems to include the role of small private tourism investors in a comprehensive approach when developing a decent regional DMO. In any case, the RDTR's approach, focusing on small investors and trying to integrate them into developing the destination by capacity-building and fostering an innovative product orientation, must be integrated into the SDR's approach one way or another. Only time will tell whether stakeholders in the Souss-Massa region will finally achieve the goal of developing a comprehensive DMO, which is democratically based in the region and can integrate the various stakeholders from civil society.

Conclusion

For more than 20 years, the Kingdom of Morocco has tried to develop democratically based regional structures. This has especially been the case since the "Arab Spring", with the king's proclamation of advanced regionalisation, with the transition from formerly autocratic hierarchical governance structures towards counter-flow oriented interactions between the central state and regional stakeholders gaining some momentum.

The governance structures and approaches in the tourism sector reflect this general political development. Nevertheless, it must be emphasised that, for a long time, the central state tried to maintain comprehensive control over all relevant activities on the local and regional level. Even with each step of decentralisation, creating new bodies at the regional or provincial level, there was a lack of comprehensive reflection on redistribution of responsibilities and tasks. Most of the creation of new structures can be seen as a simple addition of new structures, superimposing them on existing ones and creating obstructions between the different levels and institutions.

Only recently has the long-practised top-down governance approach been counterbalanced by bottom-up regional approaches to a certain extent. Moreover, within the central institutions, ambivalence between the traditional supervisory/tutelage approach and a more facilitating/coaching tendency is still quite strong. Subsidiarity has not yet been clearly developed, though it is increasingly put into practice on the regional level, even as the central institutions tend to persist with their hierarchical approach. Therefore, in this transitory phase double/parallel structures still exist; these parallel structures reflect the uneasy cohabitation of the traditional top-down approach and the emerging bottom-up initiatives from civil society and regional

democratic bodies. Nevertheless, the prospect that the democratic regional level may become too administratively oriented and might lose its relation with NGOs (like the RDTR) and private stakeholders cannot be ruled out.

Therefore, the goal of implementing governance and leadership approaches that might optimise an innovation-based orientation of tourism in Morocco, which can only be achieved by a cooperation of stakeholders from different spheres (private, public and civil society) as well as on different spatial levels (national, regional, local), is still far away. The synergies between the different stakeholders from the public and private sector as well as from civil society which might lead to an optimised performance – where each actor fulfils its respective role and promotes these common strategic approaches amongst the different stakeholders in order to stimulate a governance change – has not yet been achieved.

The inclusion of representatives from the political sphere (local, regional and national) as well as from the relevant central government administration (on the national, regional and provincial level) is a particularly crucial aspect to reduce the current top-down administrative approach, which seems only partially capable of stimulating innovative approaches to rural tourism, as it does not take into account sufficiently the conditions of small private investors in rural tourism.

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