

## **Analysis of the competitiveness of the tourism sector in the Maghreb Countries, Algeria, Tunisia, Morocco, during the period (2015-2019)**

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**Abstract---**This study aims to determine the importance of enhancing the competitiveness of the tourism sector in the Maghreb countries by analysing the competitiveness of the tourism sector in three Maghreb countries. (Algeria, Morocco and Tunisia), through a review of the components and indicators of tourism sector performance and then compare the indicators of tourism competitiveness of the three countries, as the study found that these countries have diverse and rich tourist destinations according to the World Tourism Organization in its annual reports 2015-2019. However, the weakness of tourism services and the fragility of infrastructure associated with tourism activity has been an obstacle to the achievement of the sector's objectives, and the study recently recommended the need to support the tourism sector.

**Keywords---**tourism, tourism potential, tourism competitiveness, Algeria, Tunisia, Morocco.

**Jel Classification Codes:** M00, R11, Z31, Z39.

### **I- Introduction:**

At present, tourism represents an industry in its own right and is considered one of the fastest-growing industries in the world. It has evolved and the perception of it has changed, becoming an important and vital economic source that generates revenue and provides multiple job opportunities for citizens. Moreover, tourism is an important informational and civilizational sector for the exchange of viewpoints, expertise, and experiences through the personality of the tourist and their observations

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### **How to Cite:**

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during their visit and interaction with the inhabitants of the country they visit. It is one of the dynamic sectors that stimulates economic development in any country and reflects the various aspects of the nation, whether social, cultural, or even economic. The Maghreb countries Algeria, Tunisia, and Morocco like most countries of the world, strive diligently to achieve a competitive advantage in the tourism field in order to attract the largest possible number of tourist arrivals and to secure leading positions on the map of the most attractive destinations for foreign tourists.

### **I.1- Research Problem:**

Based on the above, the main research question can be formulated as follows:

What is the reality of tourism competitiveness in the Maghreb countries (Algeria, Tunisia, and Morocco) during the period (2015–2019)?

This main question leads to the following sub-questions:

- 1- What is tourism and tourism competitiveness, and what are the main tourism determinants in the Maghreb countries?
- 2- What are the main indicators included under the Global Tourism Competitiveness Index?
- 3- Where does each Maghreb country rank within the main tourism competitiveness indicators during the period 2015–2019?

### **I.2- Research Hypotheses:**

To answer the previous questions, the following hypotheses are proposed:

- H1 – The main tourism determinants in the Maghreb countries consist of natural tourism resources, historical and civilizational resources, and material resources.
- H2 – The main indicators included under the Global Tourism Competitiveness Index are the enabling environment, policies and enabling conditions, infrastructure, and the natural and cultural resources index.
- H3 – The position of Algeria, Tunisia, and Morocco within the main tourism competitiveness indicators varies during the years from 2015 to 2019.

### **I.3- Research Objectives:**

This research paper aims to:

Identify tourism competitiveness indicators and analyze their main and sub components.

Determine the ranking of the Maghreb countries (Algeria, Tunisia, and Morocco) within these indicators during the period (2015–2019).

Compare the position of the Maghreb countries within these indicators.

### **I.4- Importance of the Study:**

This research is of great importance given that the topic of tourism sector competitiveness is among the most discussed topics worldwide, especially considering the close link between the tourism sector and the national economy of the three countries under study (Algeria, Tunisia, and Morocco). This makes it an inevitable and urgent necessity to stimulate economic growth and build a strong and cohesive economy capable of competing and facing global challenges. Therefore, this research paper constitutes an important addition to the body of studies addressing the same topic.

### **I.5- Previous Studies:**

Dr. Adir Rania, PhD student Manjal Khadija (2020), Analysis of the Competitiveness of the Algerian Tourism Sector According to the Global Travel and Tourism Competitiveness Index (ITCI)\*. This study aims to address the tourism attraction factors in Algeria in order to analyze the development of tourism demand indicators and determine Algeria's position within the World Economic Forum's global tourism competitiveness index. The study concluded that despite the country's tourism potential, Algeria ranks in lower positions in the reports due to the marginalization of the tourism sector and considering it among the government's last priorities.

Sofiane Khouloufi, Kamal Shrit (2019), *Competitiveness of the Tourism and Travel Sector in Algeria\**. This study seeks to analyze the competitiveness indicators of the tourism and travel sector in Algeria according to the World Travel & Tourism Organization's annual reports for 2015 and 2017, as well as to assess the sector's performance. The study concluded that the competitiveness of the tourism and travel sector in any country is embodied in four main indicators. Although Algeria enjoys diverse and rich tourism resources, the weakness of tourism services and limited infrastructure have hindered the country from achieving the desired objectives of this sector, which requires support and the pursuit of integration among its various capabilities.

Prof. Ibrahim Bzazo, Dr. Rania Qadah (2022), *Analysis of Global Tourism Competitiveness Indicators and Their Impact on the Development of Intra-Arab Tourism (Field Study)\**. This study aims to highlight the main competitiveness indicators within the Arab tourism investment climate in light of economic globalization, in addition to identifying the relative relationship between tourism development determinants and the competitiveness of Arab countries in the tourism reality, while diagnosing the status of the Arab tourism sector based on competitiveness indicators. The study concluded that there is a direct causal relationship between the availability of investment climate determinants and the competitiveness of any country in attracting foreign direct investment. Therefore, efforts must be made to measure competitiveness globally and issue a local competitiveness index at the level of Arab countries.

## **II- Theoretical Framework of Tourism and Tourism Competitiveness in the Maghreb Countries:**

### **II-1- Definition of Tourism and Its Importance:**

Tourism is one of the largest industries in the world, and it is difficult to define its boundaries and determine what is considered tourism and what is not (Swarbrooke, Leckie, Beard, & Pomfret, 2003, p. 05). There are many definitions of tourism, the most important of which include:

Tourism can be defined as an activity related to an individual leaving their usual environment and staying for a period not exceeding one continuous year for the purpose of recreation and enjoyment or other purposes not related to engaging in income-generating activities (Page & Al-Amri, 2008, p. 15).

Tourism is also defined as a factor attracting tourists and satisfying their desires through visiting various natural sites and learning about their terrain, vegetation, and wildlife, in addition to visiting local communities to learn about their customs and traditions (Youssef, 2013, p. 32).

Ibn Rajab Al-Hanbali defined it in (*\*The Times of Tourism and Its Future*) as "a phenomenon of human activity known since ancient times as temporary movements undertaken by individuals who leave their homeland or place of residence for other places or countries for purposes other than habitual residence" (Dugheim, 2014, p. 14).

Tourism is a temporary movement undertaken by a large number of people from different countries, leaving their permanent residence to travel to other places within their country (domestic tourism) or to other countries (international tourism) (Gharaibeh, 2012, p. 19).

Tourism refers to the act of traveling for pleasure outside one's daily environment and staying there temporarily, but also to an economic sector encompassing all activities related to tourists' satisfaction, travel, and accommodation (Simon, 2019).

perspective of the person who moves from one place to another (i.e., the traveler himself), but primarily from the perspective of those whom he meets in the country he visits carrying his filled wallet, benefiting directly such as hotels in the first place, or indirectly from what he spends to satisfy his needs whether for seeking knowledge or pleasure" (Wassila & El-Din, 2018, p. 293).

It has also been described as the industry of the twentieth century, the integrated and composite industry, the smokeless industry, the food of the soul, or the oil of the twenty-first century. Tourism is

considered a factor supporting cultural and civilizational communication between peoples and represents a source of labor demand across various sectors (Elham, 2017, p. 180).

The United Nations Conference on International Travel and Tourism held in Rome in 1963 defined tourism as “a social and human phenomenon based on the movement of an individual from their permanent place of residence to another place for a temporary period not less than twenty-four hours and not exceeding twelve months for purposes of recreational, therapeutic, or historical tourism. Tourism, like a bird, has two wings: international tourism and domestic tourism” (Lallam & Saadi, 2016, p. 75).

The definition of tourism varies according to researchers’ perspectives. Some consider it a recreational activity that allows cultural and experiential exchange among peoples, while others define it as an economic phenomenon with implications for trade movement, international relations, and investment fields. Among Muslims, it is referred to as travel or journeying on earth according to Qur’anic expression, where the traveler roams in pursuit of knowledge, trade, or jihad (Ibtisam, p. 255).

From the above definitions, tourism can be summarized as:

“Activities carried out by a person in a place outside their usual environment for a specific period without the purpose of permanent residence, excluding temporary migration for income-generating activities.”

#### **Importance of Tourism:**

Tourism holds particular importance as it achieves a set of multi-dimensional and diverse objectives, including:

- Contributing to supporting the local and global economy.
- Attracting foreign capital in the form of hard currency.
- Helping to employ a large workforce and reduce unemployment.
- Representing a market rich in various industries.
- Preserving cultural heritage and tourism resources through the use and exploitation of cultural, historical, religious, and artistic heritage.
- Encompassing all economic activities within and outside the country, as it influences and is influenced by production and consumption activities, transportation and travel, communications, etc. (Souria, 2016, p. 58).
- Having social importance reflected in geographical and demographic aspects of the population, as well as their behaviors, relationships, and cultural characteristics related to customs and traditions (Ismaili, 2016, p. 229).
- Strengthening relations between peoples as a result of mutual acquaintance and exposure to cultures and civilizations (Ghadban, 2015, p. 50).

#### **II-2- Tourism Determinants in the Maghreb Countries:**

Tourism determinants represent the natural, material, and industrial potentials available in any country and constitute the fundamental pillars of tourism supply. The distinction between countries in terms of these resources and determinants is considered a necessary condition or one of the main factors determining tourism demand. The following table illustrates the tourism determinants of the Maghreb countries:

Table (01): Tourism Determinants in the Maghreb Countries

Countries Components	Algeria	Tunisia	Morocco
Natural Tourism Determinant	<p><b>1- Geographical location:</b> Located in North Africa at the center of the Maghreb, bordered by the Mediterranean Sea to the north, Tunisia and Libya to the east, Morocco to the west, and Mali and Niger to the south; area of 2,381,741 km<sup>2</sup> (largest Maghreb country).</p> <p><b>2- Algerian coast:</b> Extends 1,200 km, characterized by rocky elevations; key areas include El Kala, Tizirt, Sidi Fredj, Tenes, and Jijel.</p> <p><b>3- Mountainous regions:</b> Tell Atlas (Cherchell station), Kabylie mountains (Tikjda), and Saharan Atlas.</p> <p><b>4- Algerian desert:</b> Features rock carvings dating back 7,000–8,000 years; key destinations include El Oued, Ghardaïa, Saoura oases, Taghit, Timimoun, Hoggar, and Tassili (Assekrem peak).</p> <p><b>5- Mineral springs:</b> 202 springs including Hammam Debagh, Hammam Righa, Hammam Salihine (Biskra), Ain Ouaraka, and Hammam Melouane.</p>	<p><b>1- Geographical location:</b> Strategically located in the far north of Africa; one of the smallest Maghreb countries with an area of 163,610 km<sup>2</sup>, bordered by Algeria to the west, Libya to the southeast, and surrounded by the Mediterranean Sea to the north and east, with a 1,300 km coastline.</p> <p><b>2- Climate:</b> Mediterranean in the north with significant rainfall; hot and dry summers; semi-arid in central regions; arid in the south due to desert nature.</p> <p><b>3- Topography:</b> Northern coast, mountains (Kroumirie range), and plateaus.</p> <p><b>4- Natural vegetation and wildlife:</b> Diverse landscapes and natural reserves protecting wildlife, becoming tourist attractions.</p>	<p><b>1-Geographical location:</b> Located in northwest Africa, bordered by Algeria to the east and Mauritania to the south, overlooking Spain and Portugal. It covers an area of 462,000 km<sup>2</sup> with a 3,500 km coastline.</p> <p><b>2- Climate:</b> Mediterranean in the north, oceanic in the west, and desert in the south; mountainous areas experience cold and humid winters with heavy snowfall in the Atlas Mountains.</p> <p><b>3- Topography:</b> High Atlas (Mount Toubkal), Middle Atlas (Bouiblane and Mount Bou Naceur), Anti-Atlas (Mount Sirwa), plains, desert, and rivers.</p>
Historical and Civilizational Determinants	<p>Among the most important historical and civilizational sites available in Algeria is "<b>Tassili Site</b>", which dates back to 6000 BC, as well as "<b>Casbah District</b>", which is considered one of the most beautiful architectural landmarks in the Mediterranean region and was registered as a World Heritage Site in 1992 in the capital. Likewise, "<b>M'Zab Palace</b>" in Ghardaïa, whose construction dates back to the 10th century AD, is surrounded by five palaces designed in a Saharan architectural style. Also, "<b>Beni Hammad Fortress</b>", which contains Roman and Islamic remains, as well as remains of the Hammadid state and the Almohad state during their presence in the region, in addition to archaeological sites such as "<b>Djemila Site</b>" and "<b>Timgad</b>".</p> <p>In addition to this, Algeria possesses a rich popular cultural heritage represented in a legacy of customs, traditions, and local festivals, as well as various traditional crafts such as carpet weaving, copperwork, and pottery.</p>	<p>The old city of Tunis, the capital, was established between the 12th and the 16th centuries. Since ancient times, it has preserved its historical title and its elements of attraction through its mosques, alleys, and ancient buildings.</p> <p>This city is considered one of the most important and richest Islamic cities; it experienced significant prominence thanks to its schools, palaces, mausoleums, and landmarks, which exceed seven hundred sites. The city of Carthage is also considered part of the human cultural heritage, in addition to important historical cities such as: "<b>Sidi Bou Said Village</b>", "<b>Mahdia City</b>", "<b>Hammamet City</b>", and "<b>Sousse City</b>", which has been classified as a World Heritage Site since 1988.</p> <p>In addition to this, Tunisian heritage is rich in customs and traditions reflected in traditional handicrafts, leather industries, jewelry making, as well as artifacts.</p>	<p>Morocco is a country rich in its civilizational and historical components, some of which date back to the Stone Age, represented in "<b>Thomas Quarries</b>", "<b>Jebel Irhoud</b>", "<b>Dar es-Soltane</b>", and "<b>Taforalta Cave</b>". There are also widespread rock engravings, some of which date back to the pre-Islamic period, including: "<b>Thamuda Site</b>", "<b>Cotta Site</b>", "<b>Arches Archaeological Site</b>", and "<b>Volubilis Site</b>", which was registered as a World Heritage Site in 1997.</p> <p>In addition to this, Morocco enjoys a rich popular heritage characterized by customs and traditions, as well as ancient crafts such as Maghrebi carpet making, copperwork, leatherwork, embroidery, and silk production. The country also pays great attention to festivals to stimulate the tourism market, such as the <b>Rabat Festival</b>, the <b>Marrakech International Film Festival</b>, and the <b>Agadir Festival of Arabic Music</b>.</p>

<b>Material Determinants</b>	<p><b>1- Infrastructure:</b>  a- <b>Transport:</b> Among its most important networks:</p> <ul style="list-style-type: none"> <li>● <b>Land transport:</b> Algeria possesses a major road network, considered one of the most significant of its kind in the Arab countries. It is divided into national roads, wilaya (provincial) roads, and municipal roads.</li> <li>● <b>Air transport:</b> Algeria has 35 airports, including 15 international airports. The air network covers 96,400 km and includes 150 agencies distributed inside and outside Algeria. Among its most important airports are Houari Boumediene Airport in the capital, as well as the airports of Constantine, Oran, and Batna.</li> <li>● <b>Maritime transport:</b> Algeria has 13 main seaports, including 9 ports designated for the reception and transport of passengers and goods, the most important of which is the Port of Algiers. Among the ports frequently used by tourists are the ports of Annaba, Oran, Skikda, Béjaïa, and Ghazaouet.</li> <li>● <b>Railway network:</b> The railway network extends over 4,200 km and is equipped with approximately 200 stations.</li> </ul> <p>b- <b>Telecommunications services:</b> Algeria's openness to international markets, as a result of the major reforms it adopted, led to the liberalization of the wired and wireless telecommunications sector. This resulted in a communications revolution marked by the significant development of mobile telephony and operators such as Mobilis, Djezzy, and Ooredoo.</p> <p>2- <b>Hotel capacity:</b> The hotel capacity in Algeria has witnessed considerable development; however, it still remains limited when compared to the levels available in neighboring countries.</p>	<p><b>1- Infrastructure:</b>  a- <b>Transport:</b> The transport sector in Tunisia suffers from noticeable deterioration; accordingly, several measures have recently been taken to improve its services.</p> <ul style="list-style-type: none"> <li>● <b>Land transport:</b> Tunisia has a road network extending over 19,000 km, in addition to a motorway distributed across the entire national territory.</li> <li>● <b>Maritime transport:</b> The strategic locations of its ports allow for the accommodation of various types of ships and the handling of different kinds of goods. These ports include: the Port of Tunis, Bizerte, Bourguiba, La Goulette (Halq El Oued), and Sidi Youssef.</li> <li>● <b>Air transport:</b> Airport capacity currently reaches 10.550 million passengers annually, and the number of foreign airline companies amounts to 112. Among the most important international airports are Tabarka, Sfax, Djerba, and Gafsa.</li> <li>● <b>Railways:</b> The railway network extends over 2,256 km and covers the entire national territory.</li> </ul> <p>b- <b>Telecommunications:</b> Tunisia was the first Arab country to connect to the Internet in 1991. It has witnessed a significant increase in the number of Internet users, ranking third in Africa in 2014. However, despite this progress, there remains a gap between the expected quality of service and the reality on the ground.</p> <p>2- <b>Accommodation capacity:</b> For decades, Tunisia has made continuous efforts to develop its hotel capacity in order to meet the demands of its tourists.</p>	<p><b>1- Infrastructure:</b>  a- <b>Transport:</b> Morocco ranks first in North Africa in the field of transport and communications. The transport network is distributed as follows:</p> <ul style="list-style-type: none"> <li>● <b>Land transport:</b> The road network extends over 95,000 km, including both paved and unpaved roads.</li> <li>● <b>Maritime transport:</b> Morocco's 3,500 km coastline has enabled it to develop a significant number of ports, most notably those in Tangier, Casablanca, and Mohammedia.</li> <li>● <b>Air transport:</b> The main Moroccan airports include Tangier (Ibn Battuta International Airport), Rabat Airport, Fez Airport, and Marrakech Airport.</li> <li>● <b>Railway network:</b> The railway network extends over 1,907 km.</li> </ul> <p>b- <b>Telecommunications:</b> The major economic choices adopted by Morocco, which were based on openness to international markets, led to the liberalization of the telecommunications sector. This contributed to a communications revolution through the remarkable growth in mobile phone and Internet usage.</p> <p>2- <b>Accommodation capacity:</b> The development of accommodation capacity in Morocco is considered a positive factor for tourism, as it aims to meet both current and future tourist demand</p>
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**Source:** Prepared by the researchers based on: Hijazi Amina, Menoun Amina, Comparative Study of the Competitiveness of the Tourism Sector in the Maghreb Countries (Algeria, Tunisia, Morocco), Master's thesis in Management Sciences, University of Mohamed Seddik Ben Yahia, Jijel, 2016–2017.

**II--3- Factors Attracting Algerian, Tunisian, and Moroccan Consumers in the Tourism Sector**  
Tourist attraction factors form the basis of the tourism product, and without them, tourism does not exist. These factors are represented as follows:

- **Topographical features:** Algeria, Tunisia, and Morocco all possess a rare topographical diversity. These countries combine mountains, sands, valleys, plateaus, plains, and rivers, each

with a different attractive tourism pattern, as well as waters and mineral stations with unique characteristics used for natural therapy.

- **Historical, archaeological, and religious features:** All Maghreb countries are historical sites of ancient civilizations and glorious past eras. Additionally, there are diverse artifacts left by past states and inscriptions that tell the stories of ancestors, not to mention unique mosques, streets, and buildings whose styles differ from Algeria to Tunisia to Morocco.
- **Natural features:** The strategic location of Algeria, Tunisia, and Morocco in North Africa provides them with natural features that captivate visitors from around the world. Their Mediterranean coast gives them a unique climate, in addition to mountains and high peaks that attract many adventurous tourists.
- **Social features:** The inhabitants of these regions possess social foundations not found elsewhere in the world. They are relatively conservative communities known for their hospitality and deeply rooted traditions, which attract a particular type of tourist who enjoys living there and experiencing its atmosphere.
- **Environmental and ecological diversity:** There is diversity in rare animals that only exist in these countries, some of which are endangered and protected from hunting, such as the "Addax" gazelle in the Algerian desert. Plants are also diverse, especially those used for therapeutic purposes.
- **Other attractions:** Regulated hunting trips, sports such as skiing, exploratory trips, recreational trips, and safaris in the deserts of Algeria, Tunisia, and Morocco, which feature vast desert areas.
- **Political and social stability:** Political stability, public safety, and security are also considered important factors attracting tourists in these three countries. (Souria, 2016, pp. 59-60)

#### II-4- Tourism Competitiveness

Tourism is one of the most important sectors that can enhance the competitiveness of the national economy as a whole. Consequently, it has received significant attention from scholars and policymakers. The tourism sector is relied upon for development, and many thinkers have attempted to define indicators to measure the effectiveness of this sector in achieving developmental goals and its performance in global markets, similar to other economic sectors. In this context, the concept of tourism sector competitiveness has emerged, defined as the ability of institutions within a country's tourism sector to achieve sustained success in international markets without relying on government support and protection, which distinguishes those countries in this sector. (Khantar, 2021, pp. 161-162)

- According to the World Tourism Organization, tourism competitiveness is "an increase in production and improvement in the quality of goods and services, satisfying consumer tastes. It is also defined as the country's ability to generate resources and capabilities that surpass its competitors in international markets." (Amer, 2015, p. 73)
- A competitive sector is one whose institutions can face internal and external competition by maintaining and expanding market share and achieving continuous profits. (Charit, 2019, p. 217)
- Tourism competitiveness at the overall sector level, according to the methodology of the International Institute for Development and Management, is defined as "maximizing added value and productivity in the tourism and travel sector by attracting investment in the tourism economy, ensuring efficient tourist arrival and return processes, marketing the country in multiple global markets, converting relative advantages into competitive advantages, and providing high-level technical and quality tourism services aligned with globalization requirements."
- Tourism competitiveness refers to the efficiency of a country's tourism sector and its ability to secure its share in the global tourism market by offering products that meet local and international market requirements. (Khadija, 2020, pp. 76-77)

From the above, we conclude that tourism competitiveness is the **continuous ability of a tourist destination to provide high-quality tourism products that meet the needs of international markets and outperform competing destinations.**

### **III- Structure of the Main Indicators of the Global Tourism Competitiveness Index**

The Tourism Competitiveness Report is issued by the World Economic Forum (Davos) in collaboration with leaders of active tourism sector stakeholders. The Forum launched its first report in 2007 as a tool to measure a range of factors that improve a country's tourism competitiveness and compare it with other countries covered by the ranking. This is done by observing all strengths and weaknesses, enabling decision-makers and stakeholders to manage and direct plans and strategies related to the tourism industry and integrate them into the developmental mix of their national economies.

The 2015, 2017, and 2019 editions of the Tourism Competitiveness Report paved the way toward a more inclusive future, focusing on the steady growth of the tourism industry in a secure environment while ensuring the sustainability of local communities' natural environment. The reports cover 141 countries in 2015, 136 countries in 2017, and 140 countries in 2019, including 19 Arab countries. The index includes four main pillars measured through 14 indicators (Khadija, 2020, p. 77). The structure of the main indicators can be summarized as follows:

#### **III-1- Enabling Environment:**

This main indicator includes several sub-indicators:

##### **1. Business Environment Index:**

Measures the country's ability to provide a favorable environment for businesses and encourage investment in the tourism sector and other sectors. Legal frameworks protecting investors' rights increase competitiveness. This index is measured using twelve variables:

- Total tax rate
- Impact of taxes on investment incentives
- Impact of taxes on labor incentives
- Cost of starting a business
- Time required to start a business
- Market dominance
- Cost of dealing with construction permits
- Time required to handle construction permits
- Efficiency of the legal framework in regulatory compliance
- Efficiency of the legal framework in dispute resolution
- Effect of business practices on foreign investment rules
- Property rights

##### **2. Safety and Security Index:**

Safety and security are fundamental pillars for determining tourism competitiveness. The index is measured using five variables:

- Costs of crime and violence on business
- Reliability of police services
- Costs of terrorism on business
- Terrorism incidence index
- Homicide rate

##### **3. Human Resources and Labor Market Index:**

This index is measured using nine variables:

- Female participation in the workforce
- Wages and productivity
- Ease of hiring foreign labor

- Ease of finding skilled employees
  - Hiring and firing practices
  - Customer orientation
  - Employee training level
  - Secondary education enrollment rate
  - Primary education enrollment rate
4. **ICT Readiness Index:**  
Measured using eight variables:
- Quality of electricity supply
  - Mobile network coverage
  - Mobile broadband subscriptions
  - Mobile cellular subscriptions
  - Fixed broadband subscriptions
  - Internet users
  - Internet use in business-to-consumer transactions
  - ICT use in business-to-business transactions
5. **Health and Hygiene Index:**  
The health sector impacts tourism competitiveness. Measured using six variables:
- Physician density
  - Access to improved health facilities
  - Access to improved drinking water
  - Hospital beds
  - HIV prevalence
  - Malaria incidence

### III-2- Tourism Policies and Enabling Conditions:

This pillar reflects several sub-indicators:

1. **Tourism Prioritization Index:** Measured using six variables:
  - Government prioritization of travel and tourism
  - Government expenditure on travel and tourism
  - Effectiveness of marketing and branding to attract tourists
  - Comprehensiveness of annual travel and tourism data
  - Accuracy of travel and tourism data reporting
  - Country brand strategy ranking
2. **International Openness Index:**  
Measured using three variables:
  - Visa requirements
  - Openness of bilateral air service agreements
  - Number of regional trade agreements in effect
3. **Price Competitiveness Index:**  
Measured using four variables:
  - Ticket taxes and airport charges
  - Hotel price index (USD)
  - Purchasing power parity (USD)
  - Fuel price levels
4. **Environmental Sustainability Index:**  
Measured using ten variables:
  - Stringency of environmental regulations

- Enforcement of environmental regulations
- Sustainable development of travel and tourism industry
- Particulate matter concentration ( $\mu\text{g}/\text{m}^3$ )
- Ratification of environmental treaties
- Water resources stress
- Threatened species
- Vegetation cover change
- Wastewater treatment
- Coastal fishing pressure

### III-3- Infrastructure:

1. **Air Transport Infrastructure Indicators:** Six variables:
  - Quality of air transport infrastructure
  - Available domestic seat capacity
  - Available international seat capacity
  - Departing aircraft
  - Airport density
  - Number of airlines
2. **Land and Sea Transport Infrastructure Index:** Seven variables:
  - Road quality
  - Road density
  - Paved road density
  - Railway infrastructure quality
  - Railway density
  - Port infrastructure quality
  - Efficiency of land transport
3. **Tourism Service Infrastructure Index:** Four variables:
  - Number of hotel rooms
  - Quality of tourism infrastructure
  - Presence of major car rental companies
  - ATMs

### III-4- Natural and Cultural Resources:

1. **Natural Resources Index:** Five variables:
  - Number of natural World Heritage Sites
  - Total known landmarks
  - Total protected areas
  - Digital demand for nature tourism
  - Attractiveness of natural assets
2. **Cultural Resources and Business Travel Index:** Five variables:
  - Number of cultural World Heritage Sites
  - Intangible and oral cultural heritage
  - Number of stadiums
  - Number of international association meetings
  - Digital demand for cultural and leisure tourism

#### IV- Maghreb Countries' Position in Main Tourism Competitiveness Indicators (2015-2019)

Before reviewing the ranking of each Maghreb country within the main tourism competitiveness indicators, the table below shows the evolution of the overall tourism competitiveness index for Algeria, Tunisia, and Morocco during 2015-2019.

**Table (02): Evolution of the Overall Tourism Competitiveness Index in Algeria, Tunisia, and Morocco (2015-2019)**

Country	2019		2017		2015		Year
	Rank	Score	Rank	Score	Rank	Score	
Algeria	3.1	116	3.1	118	2.9	123	Overall Index
Tunisia	3.6	85	3.5	87	3.5	79	
Morocco	3.9	66	3.8	65	3.8	62	

Source: Prepared by researchers based on the Global Travel and Tourism Competitiveness Report, 2015-2019.

The table shows the tourism competitiveness ranking of Algeria, Tunisia, and Morocco. Morocco dropped three ranks, then one more compared to 2015, ranking 66th globally in 2019, with a slight score increase from 3.8 to 3.9. This decline is due to improvements by other countries in the 2017 and 2019 reports. Tunisia also dropped eight ranks in 2017 compared to 2015, then advanced by two ranks in 2019 with a score improvement from 3.5 to 3.6.

Algeria improved by five ranks in 2017 compared to 2015, with its score rising from 2.9 to 3.1, then further improved by two ranks in 2019, reaching 116th place with a score of 3.1. Despite its potential, this position reflects a relatively low ranking among the 140 countries covered by the report.

#### IV-1 Ranking of the Maghreb Countries According to the First Main Indicator

Below, we present the ranking of the three countries according to the first main indicator in three different years:

**Table (03): Ranking of the Maghreb Countries in the First Main Indicator: Enabling Environment for the Year 2015**

The First Main Indicator: Enabling Environment					
Country	Business Environment	Human Resources and Labor Market	Health and Hygiene	Safety and Security	ICT Readiness
Algeria	121	109	84	95	105
Tunisia	71	87	76	98	76
Morocco	42	107	98	37	75

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2015.

The table indicates that Algeria, Tunisia, and Morocco ranked low in terms of the competitiveness of their enabling environment, as reflected by the ranking of its sub-indicators. Algeria ranked 121, Tunisia 71, and Morocco 42 in the Business Environment sub-indicator, which are varying degrees of delay. The report explains this by the inefficiency of the legal framework in settling disputes and the high costs along with the lengthy time required to start a business, especially in Algeria. Regarding the Safety and Security indicator, Morocco advanced to rank 37, while Algeria and Tunisia occupied somewhat lower ranks, due to the high costs of crime, violence, and terrorist acts. In the Health and Hygiene indicator and the Human Resources and Labor Market indicator, all countries ranked relatively low with slight

differences among them, due to the shortage of doctors in general and the difficulties faced by the state in employing foreign workers. Finally, in the ICT Readiness indicator, Algeria ranked last compared to Tunisia and Morocco, which is explained by the low internet usage in addition to the quality of electricity supply.

**Table (04): Ranking of the Maghreb Countries in the First Main Indicator: Enabling Environment for the Year 2017**

<b>The First Main Indicator: Enabling Environment</b>					
<b>Country</b>	<b>Business Environment</b>	<b>Human Resources and Labor Market</b>	<b>Health and Hygiene</b>	<b>Safety and Security</b>	<b>ICT Readiness</b>
<b>Algeria</b>	110	112	89	81	96
<b>Tunisia</b>	66	113	75	102	73
<b>Morocco</b>	49	117	99	20	77

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2017.

From the table, we observe that Morocco distinguished itself by improving its rankings in all indicators compared to the 2015 report, which reflects the country's efforts and development of its enabling environment capacities. Tunisia, on the other hand, advanced in some indicators and declined in others, particularly in the Human Resources and Labor Market indicator, where it dropped by 26 ranks, due to the decline in the level of secondary education. Algeria also showed variation, advancing in some rankings and declining in others compared to the previous report. Notably, it made significant progress in the Business Environment and ICT Readiness indicators, due to the adjustments made by sector officials.

**Table (05): Ranking of the Maghreb Countries in the First Main Indicator: Enabling Environment for the Year 2019**

<b>The First Main Indicator: Enabling Environment</b>					
<b>Country</b>	<b>Business Environment</b>	<b>Human Resources and Labor Market</b>	<b>Health and Hygiene</b>	<b>Safety and Security</b>	<b>ICT Readiness</b>
<b>Algeria</b>	118	102	76	53	89
<b>Tunisia</b>	68	101	80	90	80
<b>Morocco</b>	38	99	97	28	72

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2019.

The table shows Morocco's continued progress in its rankings, while Tunisia declined in most of its indicators compared to previous reports. Algeria recorded noticeable progress in its ranking within the Safety and Security indicator in particular, as well as in Health and Hygiene and ICT Readiness, due to the reduction in the costs of crime and violence, the improvement of the prevailing security situation, improved drinking water, and increased internet usage rates.

#### **-IV-2 Ranking of the Maghreb Countries According to the Second Main Indicator**

Below, we present the second main indicator, which is Policies and Enabling Conditions in the Tourism Sector:

**Table (06): Ranking of the Maghreb Countries in the Second Main Indicator: Policies and Enabling Conditions in the Tourism Sector for the Year 2015**

<b>Second Main Index: Tourism Policy and Enabling Conditions</b>				
<b>Country</b>	<b>Travel and Tourism Prioritization</b>	<b>International Openness</b>	<b>Price Competitiveness</b>	<b>Environmental Sustainability</b>
<b>Algeria</b>	139	137	10	113
<b>Tunisia</b>	44	103	7	59
<b>Morocco</b>	26	94	47	70

**Source:** Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2015.

The table shows that Algeria ranked 139 out of 141 countries in the report, and also last compared to Tunisia and Morocco in the Travel and Tourism Prioritization indicator. This very low ranking is due to the lack of comprehensive information about the sector and the inefficiency of the market and branding in attracting tourists. This contrasts with Morocco's provisions and its government's interest in the sector, which led it to obtain rank 26. We also note a significant delay for Algeria and Tunisia in the International Openness indicator, due to the lack of effective regional trade agreements and the difficulty of obtaining visas. However, they ranked very high, 10 for Algeria and 7 for Tunisia, in the Price Competitiveness indicator, due to low hotel and fuel prices, given that Algeria is an oil-exporting country and due to improved purchasing power. Algeria also ranked 113, which is very low, in the Environmental Sustainability indicator, due to the lack of strict environmental regulations, absence of ratification of environmental treaties, and lack of attention to sustainable tourism sector development.

**Table (07): Ranking of the Maghreb Countries in the Second Main Indicator: Policies and Enabling Conditions in the Tourism Sector for the Year 2017**

<b>Second Main Index: Tourism Policy and Enabling Conditions</b>				
<b>Country</b>	<b>Travel and Tourism Prioritization</b>	<b>International Openness</b>	<b>Price Competitiveness</b>	<b>Environmental Sustainability</b>
<b>Algeria</b>	131	134	4	106
<b>Tunisia</b>	48	76	9	89
<b>Morocco</b>	35	91	47	107

**Source:** Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2017.

From the above table, we see that Algeria and Morocco improved their rankings in most sub-indicators of the Policies and Enabling Conditions in the Tourism Sector indicator, due to the beginning of state interest in the sector given its importance. Tunisia's ranking declined compared to the 2015 report in most sub-indicators, except for the International Openness indicator, where it advanced by 27 ranks due to the beginning of its participation in effective regional agreements.

**Table (08): Ranking of the Maghreb Countries in the Second Main Indicator: Policies and Enabling Conditions in the Tourism Sector for the Year 2019**

<b>Second Main Index: Tourism Policy and Enabling Conditions</b>				
<b>Country</b>	<b>Travel and Tourism Prioritization</b>	<b>International Openness</b>	<b>Price Competitiveness</b>	<b>Environmental Sustainability</b>
<b>Algeria</b>	132	139	8	133
<b>Tunisia</b>	45	106	12	46
<b>Morocco</b>	26	80	46	44

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2019.

We observe that Algeria and Tunisia continued to decline in their rankings in almost all sub-indicators, due to the prevailing political conditions (the Hirak). In contrast, Morocco continued to advance in its rankings, even if at a slight rate, due to its focus and attention on the tourism sector and addressing the lack of strict enforcement of environmental regulations, which enabled it to advance by 66 ranks in the Environmental Sustainability indicator compared to the 2017 report.

#### IV-3 Ranking of the Maghreb Countries According to the Third Main Indicator

In this case, we present the third main indicator, which is Infrastructure, to see the positions of Algeria, Tunisia, and Morocco within its sub-indicators:

**Table (09): Ranking of the Maghreb Countries in the Third Main Indicator: Infrastructure for the Year 2015**

Main Index Three: Infrastructure			
Country	Tourism Service Infrastructure	Ground and Maritime Transport Infrastructure	Air Transport Infrastructure
Algeria	138	121	113
Tunisia	61	94	77
Morocco	65	69	64

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2015.

From the data presented in the table, we note that the three countries suffer from significant weakness in the Air Transport Infrastructure indicator, with Algeria ranking the lowest at 113, due to the limited number of airports and operating airlines. Their rankings also remained low in the Ground and Port Infrastructure indicator, due to weak railway networks, their limited number, the insufficient and poor-quality road networks, as well as weak port infrastructure. Regarding the Tourist Service Infrastructure sub-indicator, Tunisia and Morocco have relatively close rankings (61–65), which are considered moderate compared to Algeria weak ranking (138). This is due to the limited use of ATMs, in addition to the shortage and low quality of hotel services.

**Table (10): Ranking of the Maghreb Countries in the Third Main Indicator: Infrastructure for the Year 2017**

Main Index Three: Infrastructure			
Country	Tourism Service Infrastructure	Ground and Maritime Transport Infrastructure	Air Transport Infrastructure
Algeria	131	105	100
Tunisia	69	95	85
Morocco	80	60	63

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2017.

From the above table, we observe that Algeria improved its rankings in all sub-indicators compared to the 2015 report, which can be explained by the reforms affecting the country's infrastructure. Tunisia and Morocco, meanwhile, experienced improvement in some indicators and decline in others.

**Table (11): Ranking of the Maghreb Countries in the Third Main Indicator: Infrastructure for the Year 2019**

<b>Main Index Three: Infrastructure</b>			
<b>Country</b>	<b>Tourism Service Infrastructure</b>	<b>Ground and Maritime Transport Infrastructure</b>	<b>Air Transport Infrastructure</b>
<b>Algeria</b>	136	90	99
<b>Tunisia</b>	68	99	82
<b>Morocco</b>	78	61	58

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2019.

From the previous table, we observe variation in the rankings among the three countries, with slight decline and improvement compared to previous reports due to the improvement in the situation of other countries participating in the report. However, we note that Morocco remains at the forefront in all sub-indicators compared to Algeria and Tunisia.

#### **IV-4 Ranking of the Maghreb Countries According to the Fourth Main Indicator**

Below, we present the final main indicator, which is Natural and Cultural Resources:

**Table (12): Ranking of the Maghreb Countries in the Fourth Main Indicator: Natural and Cultural Resources for the Year 2015**

<b>Main Index Four: Natural and Cultural Resources</b>		
<b>Country</b>	<b>Natural Resources</b>	<b>Cultural Resources</b>
<b>Algeria</b>	127	50
<b>Tunisia</b>	105	70
<b>Morocco</b>	59	39

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report for the year 2015.

From the above, we note that Algeria and Tunisia ranked low in the Natural Resources sub-indicator compared to Morocco, which ranked 59. This is due to the lack of protected areas and the neglect of natural sites and world heritage sites. As for the Cultural Resources indicator, Algeria and Morocco ranked advanced positions unlike Tunisia, due to their possession of a number of sports stadiums and several world cultural heritage sites.

**Table (13): Ranking of the Maghreb Countries in the Fourth Main Index – Natural and Cultural Resources, 2017**

<b>Main Index Four: Natural and Cultural Resources</b>		
<b>Country</b>	<b>Natural Resources</b>	<b>Cultural Resources</b>
<b>Algeria</b>	124	53
<b>Tunisia</b>	94	83
<b>Morocco</b>	47	41

Source: Prepared by the researchers based on the World Travel & Tourism Competitiveness Report, 2017.

We can observe that the three countries almost all declined in their rankings in both sub-indices compared to the 2015 report, due to neglect. However, Morocco remains consistently in the lead.

**Table (14): Ranking of the Maghreb Countries in the Fourth Main Index – Natural and Cultural Resources, 2019**

<b>Main Index Four: Natural and Cultural Resources</b>		
<b>Country</b>	<b>Natural Resources</b>	<b>Cultural Resources</b>
<b>Algeria</b>	126	51
<b>Tunisia</b>	90	90
<b>Morocco</b>	63	47

**Source:** Prepared by the researchers based on the World Travel & Tourism Competitiveness Report, 2019.

From the previous table, we observe the continued decline in the rankings of the three countries compared to earlier reports, especially Morocco. This is due to weak interest in the sector and the prevailing temporary conditions.

## **V – Conclusion**

The tourism industry has become an independent industry on which the economies of many countries around the world rely, as it represents a major source of income. Tourism competitiveness indicators are among the indicators that demonstrate the economic strength represented by the tourism sector at present. For Algeria, Tunisia, and Morocco, the tourism sector in these countries plays varying roles in performance indicators. These countries possess diverse natural and geographical qualifications, in addition to a rich cultural and historical heritage, which qualifies them to become among the most important global tourism destinations.

### **V-1. Research Findings**

- Algeria is characterized by natural, cultural, and civilizational diversity that can make it an outstanding tourist attraction and enable it to occupy an important position in international tourism. The same applies to Tunisia and Morocco, which enjoy nearly similar advantages.
- The political and security instability experienced by Algeria and Tunisia has contributed to deepening the crisis in the tourism sector, which naturally affects their recorded competitiveness in this sector.
- The competitiveness of the tourism sector varies among Algeria, Tunisia, and Morocco. Tunisia and Morocco occupy advanced rankings compared to Algeria. This disparity is explained by the fact that competitiveness does not depend solely on inherited assets and resources, but rather on creativity, innovation, and the development of infrastructure to identify and meet tourists' present and future needs, thereby reflecting the country's tourism attractiveness.

### **V-2. Research Proposals**

- Integrating the concept and importance of tourism security into educational curricula at all levels of the state, given its importance for tourists and its negative impact on foreign arrivals when absent.
- Designing more training and education programs at all levels within the tourism sector (for both Algeria and Tunisia).
- Optimally exploiting the tourism potential available in the three countries and benefiting from the experiences of successful countries in this field, especially those with similar characteristics.

### **V-3. Research Prospects**

- The shortcomings of the role of the National Tourism Office in promoting the tourism assets of the Maghreb countries (Algeria, Tunisia, and Morocco) abroad.

- An analytical study on the volume of investment opportunities provided by the tourism sector in each of the Maghreb countries (Algeria, Tunisia, and Morocco).
- A study of the tourism infrastructure in Algeria, Tunisia, and Morocco, and its comparison with leading Arab countries in this field.

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