Expert Group Meeting on
Ecotourism, Poverty Reduction & Environmental Protection
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Vision 2020 for tourism in Morocco
Focus on Sustainability and Ecotourism

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www.tourisme.gov.ma
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TOURISM

A powerful driver of economic growth:
An important tool for regional improvement and development, making the most of the various territories, population groups, and other assets in a sustainable way.
Multiplier effects on all other sectors of the economy, an important and plays a significant part in the prosperity of the country as a hole.

**Vision 2010**

- Moroccan tourism’s international achievement: 25th place worldwide at the end of 2010
- In the Moroccan economy: Tourism is the top of foreign exchange earner, 2nd biggest contributor to GDP and 2nd biggest creator of jobs

Maroc

A rich heritage of civilization and culture, a welcoming and tolerant people, and a responsible nation committed to the values and principles of sustainable development.

Tourism: A national priority in Morocco

### Principaux indicateurs 2012

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part / PIB (%)</td>
<td>7.8</td>
</tr>
<tr>
<td>Contribution à l’emploi (emploi direct)</td>
<td>480 000</td>
</tr>
<tr>
<td>Arrivées (en millions)</td>
<td>9.4</td>
</tr>
<tr>
<td>Nuitées (en millions)</td>
<td>17.4</td>
</tr>
<tr>
<td>Recettes (en milliards de DH)</td>
<td>57.9</td>
</tr>
<tr>
<td>Capacité d’hébergement (lits)</td>
<td>193 987</td>
</tr>
<tr>
<td>Investissements conventionnés (en milliards de DH)</td>
<td>14.4</td>
</tr>
</tbody>
</table>

Cumul des recettes touristiques sur 2 décennies (milliards de dh)
Source: Office des changes

Evolution des ARRIVÉES en millions entre 1991 et 2010
Source: Département du tourisme/Observatoire du Tourisme
Tourism as a national priority

The AIMS

• Getting Morocco into the world’s top twenty destinations
• A model of sustainability in the Mediterranean destinations

VISION 2020

OBJECTIVES IN FIGURES

Doubling the size of the sector

• 200,000 new beds
• Double touristic arrivals
• Triple domestic trips

2nd economic sector:

• 470,000 new direct jobs
• Double touristic receipts to reach 140 billion DHs
• 2 additional points to the touristic GDP
I. The basic principles of Vision 2020

1. Building on the achievements of Vision 2010

2. Moving forward to a more integrated form of territorial improvement

3. Making the most of the country’s great variety of resources by responding to the demands of the most promising markets

4. Remedying the industry’s persistent structural weaknesses

5. Putting sustainable development at the heart of our strategy

Co-ordinating the actions of public and private stakeholders:
V2020 has been conducted in a spirit of co-operation with the various organizations involved: private and public, national and local
II. The framework for the strategic activity of Vision 2020

V 2020 wishes to develop a model of tourism that combines sustained growth and responsible custody of the environment with respect for our authentic social and cultural life.

> An innovative approach to sustainability, based on a new generation of tourist products, long-term ecosystem management and local people’s participation in development and the benefits of tourism

A policy of improving Morocco’s offering to tourists

Sustainable development: A challenge but also an opportunity for tourism in Morocco to distinguish itself

A new institutional arrangement
II. The framework for the strategic activity of Vision 2020

a. A policy of improving Morocco’s offering to tourists:

Creation of 8 tourist destinations

And 6 Framework programmes for a diversified product range

• THE AZUR 2020 PROGRAMME
• PATRIMONY AND HERITAGE PROGRAMME
• EVENTS, SPORT & LEISURE PROGRAMME
• HIGH VALUE ADDED NICHE PROGRAMME (BUSINESS AND WELL-BEING)
• BILADI PROGRAMME
• GREEN/ECO / SUSTAINABLE DEVELOPMENT PROGRAM:

Developing an additional green/nature range by means of innovative best-in-class sustainable development products (eco-lodges, desert resort, glampings…)

[Diagram showing various tourist destinations and program areas, such as Marrakech & the Atlantic, Central Atlantic, Souss Sahara Atlantic, Atlas & the Valleys, and others.]
Putting more emphasis on institutionalization of Sustainable Tourism

- **The establishment of special instruments for monitoring and evaluating sustainability indicators** for the industry (compliance with tourist density thresholds, water consumption, the condition of the natural cultural attractions,…) by means of regional monitoring arrangements;

- **Strengthening the sustainability criteria in legal and regulatory standards**, to distinguish model establishments and those that make particular efforts in this direction.
To promote a specifically Moroccan model of sustainable tourism, 3 challenges must be met:

- **Guaranteeing sustainability** and conservation of Morocco’s natural resources, its authenticity and the well-being of its citizens

- Responding to tourists’ evolving **social** and **environmental sensitivities**

- Seizing the opportunity to **make sustainability a distinguishing feature for Morocco**
c. Sustainable development: A challenge and an opportunity for tourism in Morocco

Morocco’s development as a tourist destination is just beginning = unique window of opportunity in which to promote a model that enables it to capitalise on its wealth of natural and cultural advantages, while continuing to conserve those advantages so that their exploitation yields the best and most sustainable social and economic development of its various regions.

Constraints imposed on Morocco:
Tourism must take account of the constraints imposed on Morocco by WATER and ENERGY ressources:
> All necessary steps must be taken and initiatives deployed to conserve its resources and natural advantages.

An analysis of tourist density levels for each of the destinations in the V 2020 made it possible to establish a maximum tourist density that must not be exceeded if ecosystem degradation and adverse effects on local communities are to be avoided.

That level has been determined separately for each destination, according to an environmental audit that assessed the fragility of the various ecosystems, the ressources available and the environmental infrastructure.
II. The framework for the strategic activity of Vision 2020

c. Sustainable development: A challenge and an opportunity for tourism in Morocco

Apprehension of saturation thresholds for each tourist site

Diagnostic of the level of density of tourism on the horizon of 2016
- Sociocultural pressure: Nights per habitants in touristic aerea
- Land use: Beds in commercial accommodation/km² of the site or meters of beaches /beds in commercial accommodation

Diagnostic of environmental constraints per site
- Environmental constraints: Constitution of a synthetic indice
  - Level of water availability
  - Fragility of ecosystems
  - Quality of infrastructure (energy, wastewater treatment)
  - Pollution level

Determination of several thresholds by site
- Saturation point: Maintaining capacity and arrivals per site to a sustainable level
In an integrated logic, sustainability must be present in all levels of the life cycle of the tourism product.
II. The framework for the strategic activity of Vision 2020

**a. SUSTAINABILITY MONITORING MECHANISM**

**b. REINFORCEMENT OF THE ENVIRONMENTAL REGULATIONS**

- **Projet Pilote Merzouga | CDC Bivouacs**
  - La loi n° 61-00 portant statut des établissements touristiques (dahir n° 1-02-175 du 1er rabii II 1423 (13 juin 2002) ;
  - Le décret n° 2-02-640 du chaabane 1423 (9 octobre 2002) pris pour l’application de la loi 61-00 portant statut des établissements touristiques ;
  - L’Arrêté du ministre du tourisme N° 1751.02 du 23 chaoual 1424 (18 décembre 2003) fixant les normes de classement des établissements touristiques ;

**c. INCENTIVES**

- **MOUSSANADA SIYAHÀ**
- **RENOVOTEL | 3**

**d. TRAINING AND RAISING AWARENESS PROGRAMME**

- **Elearning**
  - Caravane compét.
II. The framework for the strategic activity of Vision 2020

ZOOM ON | **Sustainability Monitoring Mechanism: Sustainability Indicators**

**a** Identify sustainability criteria
- Environmental Pillar
- Socio Economic Pillar
- Social/cultural pillar

**b** Define the objectives of the monitoring device

**c** DEFINING THE STRUCTURING DIMENSIONS OF SUSTAINABILITY
- Analysing the life cycle product
- Touristic experience

**SUMMARY OF THE STRUCTURING DIMENSIONS OF SUSTAINABILITY**

- Tourism pressures on the natural resources
- Efficiency in the use of the water and energy
- Authenticity of the tourism experience and tourist satisfaction
- Tourism pressures on the host communities
- Participation of tourism in promoting tangible and intangible heritage and natural resources
- Engagement of the stakeholders in sustainable approaches/social responsibility
- Tourism contribution to the local economy and employment development

**d** DEFINITION AND SELECTION OF THE INDICATORS
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III. Ecotourism in Moroccan Tourism Strategy

Current status of nature conservation & biodiversity

The geographical location of Morocco between the Mediterranean Sea, the Atlantic Ocean and the Sahara desert has encouraged a rich biodiversity and ecosystems with highly diverse and complex habitats.

Morocco has established a nationwide ecological network of 10 national parks and 160 Sites of ecological and biological interest representative of the bio-ecological zoning plan to remarkable ecosystems and a high concentration of plant and/or animal endemic or rare threatened.

The development of tourism in natural areas (adventure tourism, ecotourism, rural tourism, etc.) necessarily raises the question of the environmental protection of these areas.

Ecotourism as a way to make tourism based on the desire to discover nature and to respect, preserve and enhance the natural balance and cultural places and local population, can efficiently contribute to the vitalization of regional economies and enhancing the natural potential.
Vision 2010

Tourism Rural Tourism Policy – development of “Pays d’accueil touristique” PAT: a geographic area that has an homogeneity both in physical and human level.
Network of sites and products related to homogeneous programs and led by a tourist county town.

National design / local declination considering the potential and constraints of each territory

Steps of implementation
- Integration of the concept
- Territorialisation
- Convergence
- Networking

Vision 2020

Continuity / Improvement of Vision 2010
- More Focus on Sustainable Development mainly in Green/Eco/Sustainable development Programme and Events, Sport & Leisure Programme
- Quality Enhancement
- Innovation and improvement in the content of PAT (Green resort, eco-resorts, eco-lodges ...)
- Reinforcement of Nature tourism offers (ecotourism, agritourism, rural tourism, ...)

Reinforcement of Nature Tourism

III. Ecotourism in Moroccan Tourism Strategy
Diversification and enrichment of the offer of rural and eco tourism through:

- Dissemination of tourist structures, environmentally friendly and integrated into the socio-cultural environment such as eco-resorts, green resorts and desert bivouacs luxury..
- Reinforcement and development of small structures accommodation such as lodges and eco-lodges

- Structuring tourism in rural areas;
- Rebalancing tourism development in rural areas;
- Creation of income generating activities for local communities and reducing the effects of poverty in rural areas;
- Creation and diversification of employment opportunities for local young people (*Creation of 20 000 jobs in PATs in 2011*);
- Contribution to the creation of knock-on effects on other sectors (agriculture, crafts ... etc).
III. Ecotourism in Moroccan Tourism Strategy

Protection/ Enhancement of ecological sites and fragile areas through tourism
Pilot Site: Merzouga

Merzouga:

A small Saharian village in southeastern Morocco, known for its sand dunes, the highest in Morocco. Merzouga has become a tourist attraction of great importance for this region of Morocco, for the development of hotel industry, both locally and in the neighboring towns of Errachidia and Erfoud. Activities available to tourists are camel trekking, camping in the desert, quad and arénothérapie (or sand bath).

Main objective of the Project

Protect and promote tourist heritage of Merzouga through the development of sustainable tourism and capacity building of local actors.

A covenant has been signed between Ministry of Tourism, UNDP and POT in 30 may 2013 in order to:

- **Enhancement of environmental regulations**: structure the two major tourist activities in the region: Accommodation (bivouacs "fixed") and Entertainment & Leisure (motorsport: quad, 4x4, motorcycle);

- **Planning / Landscape Management**: Structure the existing orientation signage in harmony with the natural landscape of the region, Development of a markup to define a zoning bivouacs and circuits for motorsports

- **Capacity Building & Technical Assistance of local actors**: Create a network of trained / local actors aware of good sustainability practices, Support local actors in achieving sustainable management by directing them to the best practices & technical solutions Sustainability

- **Development of indicators for sustainability monitoring**: Development / testing of a set of indicators to monitor sustainability in the tourist site Merzouga.
**Programme Oasis Sud (Southern Oases Program)**

Supported by the Agency of the south, in partnership with the ministry of interior and the United Nations Development Programme, the Programme aims:

- The enhancement and preservation of assets and potential landscape, historical and cultural heritage of oases of southern Morocco;
- Create jobs for local stakeholders and work for the professionalization of local actors in the tourism industry in a framework that respects the principles of sustainable development and responsible tourism.

This initiative has won in **2010** the **Moroccan trophy for Responsible Tourism**

*The Oasis of Morocco holds not only the treasures of biodiversity but also an ancient civilization of the arid still has expertise perfectly in line with the sustainable development.*

*Indeed, systems oasis production have allowed local people to maintain, or even thrive in extremely fragile natural environments. Among the most significant of good health oasis markers, date palm is certainly the structuring element of space, society, as well as the major factor in the adaptation climate.*
SAVE THE DATE!

‘Maroc, Destination Durable’
Agadir | February, 23- 24-25-26; 2014

4th International Symposium on Sustainable Tourism
& 4th Annual Conference of members of
the Global Partnership for Sustainable Tourism
Thank you