
**Evaluation of Tourism Investments in the Northeast of Morocco:
Perspectives and Limits**

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Abstract. The recent development of tourism in the north-east of Morocco and the renewed interest in the tourist potential of some of its sites have generated notable tourist dynamism. Considerable investments, exceeding 6124.14 million US dollars until 2020, have been devoted to the tourist development of its coast (Eastern Mediterranean Coast of Morocco: CMO), with the aim of making this sector a driver of socio-economic development for these areas. This article aims to evaluate this development objective by examining the economic and social effects of these investments, notably the creation of wealth and jobs. In conclusion, the investments in question, as well as the hopes placed in them for the development of the Oriental region, proved incapable, particularly due to the seasonality of tourist activity, of constituting an engine of development for the Moroccan north-east.

Keywords: tourism investments, economic and social effects, north-east Morocco

Introduction

In Morocco, tourism has been made a priority for the socio-economic development of the territory over the last two decades. Several tourism development plans have been developed, such as the Azur 2010 plan, the Biladi plan and the 2020 vision, emphasizing seaside tourism and mobilizing significant investments for large-scale tourist developments.

From 2003, particular attention was paid by the Moroccan state to the Oriental region in general, in particular to its northern provinces, as part of its economic development, particularly through the tourism sector. This is presented as the main engine of regional development according to the official discourse. This orientation is adopted while other economic sectors, notably agriculture which was previously favored, are unable to generate the expected socio-economic development on their own. Thus, a remarkable dynamic of tourism investment has emerged over the last two decades in the region. Colossal tourism projects such as the new Saïdia tourist resort (946.9 million US dollars) and the Marchica project (4585.2 million US dollars) are proving to be structuring programs for the planning and development of the coastal zone. Significant private investment followed in the region, reaching 591.9 million US dollars between 2014 and 2020.

The north-east of Morocco has relatively owed its development to its geographical location. It has been, at different times, a zone of passage and exchange with the Maghreb to the east and Europe to the north. However, the marginality inherited from the colonial era was exacerbated by an inopportune geopolitical climate after independence, due to its dual unstable border situation: a natural (the Mediterranean) and artificial (Melilla presidency) border to the north, as well as 'a political border in the east. This context was unfavorable for a tangible economic investment, in the absence of a serious desire on the part of the State. As a result, the region suffered from numerous socio-economic problems: a high unemployment rate (22.2% in 2003, compared to a national average of 13%), as well as a significant level of poverty (23.3% in 2004). (High Commission for Planning, 2004).

It is in this context that the coast of the region (Eastern Mediterranean Coast of Morocco: CMO), was put into tourism in 2005, thus welcoming the New Tourist Station of Saïdia (NSTS) and the tourist development of the lagoon of Marchica in Nador. This tourist revitalization of the coast has led to significant dynamics in the sector. To what extent does this dynamic contribute to the desired socio-economic development of the Moroccan north-eastern provinces?

Tourism is an economic reality measured by its revenues and jobs (Dehoorne, 2002). By impact we mean a positive or negative development, induced by a phenomenon, in this case the tourist dynamic observed on the coast. These benefits manifest themselves in various aspects, notably the creation of employment and wealth, reflecting the social and economic impact in terms of activities generated in the economic fabric at different local, regional and national spatial scales.

In Morocco, tourism continues to be a vital sector of the national economy. In 2019, just before the COVID-19 pandemic, its contribution to the national GDP stood at 7.1%, with a total turnover of 8113.95 million US dollars (HCP, 2019). In the northeast of the country, such statistics are not available. However, the recent tourism dynamic suggests a clear improvement in the sector's turnover compared to other regions. Indeed, the Saïdia-Oujda destination becomes the 8th national tourist destination for the 2019 financial year, with 628424 nights in classified accommodation establishments, thus surpassing the destinations of Tetouan on the west Mediterranean coast and El Jadida-Mazagan on the Atlantic coast of Morocco (Tourism Observatory, 2019).

We will therefore firstly address the dynamics of tourism investments, then secondly its economic and social contributions. It is also essential to identify the main explanatory factors of these impacts.

Literature Review

Tourism is a social phenomenon with economic variants, subject to continuous developments and varying according to space. It is characterized by travel for non-profit purposes and the economic activities that result from it (Saadaoui, 2017). It arouses the interest of various specialists, notably economists and geographers.

Defining tourism poses considerable challenges. Thus, many authors give up defining it, while others adopt partial perspectives. According to Violier (2008), tourism is a social practice that takes on meaning in industrial society. This view thus joins the generalization of Berriane (1989), having studied tourism in Morocco, affirming that the majority of theorists believe that the development of this phenomenon is linked to the evolution of industrial and post-industrial societies.

Knafou and Stock address the systemic nature of tourism by describing it as a system that involves tourists, tourist territories and networks, markets, practices, laws, values and institutions (Lévy & Lussault, 2003). The notion of tourism is often linked to the concept of leisure, of which it constitutes a component. Dupont (2002) emphasizes that this notion encompasses three aspects: tourism, travel and weekend activities, as well as free time or daily leisure.

The majority of geographers, referring to the UNWTO definition (2013), stolen in 1993 by the United Nations Statistical Commission (UNSC). It defines tourism as a set of activities carried out by people during their travels and stays in places located outside their usual environment for a consecutive period which does not exceed one year, for leisure purposes, for business or other reasons (UNSC, 1993).

The reasons for tourist travel were clarified in 20083 by the International Recommendations on Tourism Statistics (RIST) and grouped into two main categories:

personal reasons such as leisure, visiting friends or family, and professional reasons. These RISTs specify that this reason must exclude any paid activity in the place visited.

For Berriane (2009), the problem of defining tourism essentially concerns the plurality of forms that national tourism takes. Unlike international tourism, which can be studied using abundant official statistics such as tourist arrivals and overnight stays, internal and national tourism are difficult to understand in Morocco. This difficulty arises from the diversity of Moroccan tourist practices, particularly with regard to accommodation. Therefore, apart from statistics relating to attendance at officially classified accommodation establishments, no official and reliable data on visitors using non-commercial forms of accommodation is available.

Finally, we retain the following definition of tourism: it is a system of actors, practices and spaces serving tourists, whatever their motives, involving their travel outside their usual places for a duration less than one year. These visitors may be day trippers or staycation tourists.

The impact of tourist activity on a place necessarily depends on the different categories of tourists who visit it as well as their tourist behaviors and practices. Depending on the definition of tourism used, it may be a stay tourist or a day tourist (excursionist). It seems obvious that the first category of tourists is likely to provide tourism with its capacity to contribute to development, because these tourists are obliged to consume the services and tourist products offered, particularly accommodation and catering. The effect of these visits is all the more important as the length of stay of this category is long. Only significant attendance at a tourist location is able to make up for the low average stay at that location. As for the second category of tourists (excursionists), the impact of their visit on the places frequented obviously depends on the distances traveled.

Reporting on the level of activity generated by tourism mainly involves analysing the turnover of companies involved in the activities characteristic of the sector, which reflects the creation of wealth. There are a number of studies which have highlighted them as an adequate indicator for this evaluation, notably that established in 2012 by the General Directorate for Industrial Competitiveness in France (DGCIF).

A more in-depth appreciation of the socioeconomic impacts of tourism invites us to consider other indicators recommended by researchers. Hillali (1985) proposes the employment per bed (E/B) ratio, which indicates the number of tourist beds required to create employment.

Research Methodology

We chose a research methodology based on the hypothetico-deductive approach. The initial hypothesis of this work suggests that the nature of tourism demand in the CMO, characterized by a predominance of excursionists, particularly those coming from the region (Haddouti, 2019), as well as strong seasonality, suggests impacts limited economic and social. This study is designed by adopting an especially quantitative analysis, focusing particularly on the turnover of tourism companies. Ratios are also calculated in order to evaluate the jobs generated by tourist units, particularly accommodation establishments.

A comparative approach is also favored, in order to bring together the volume of tourist activity on the coastline studied, in terms of turnover. This approach will be carried out in two stages (intrinsic and extrinsic). Firstly, we carry out a comparison of the volumes of activity recorded in the main sites in the north-east in question. This will allow us to nuance this activity on the coast, given that it is heterogeneous. Secondly, it is a question of establishing a reliable benchmark taking into account the context of the tourism sector in Morocco. To do this, we selected the coast of Agadir, known as the leader in Moroccan seaside tourism, with which the

comparison of turnover will be able to provide a rational judgment regarding the evaluation of recent tourist investments mobilized in the studied area.

Among the activities characteristic of tourism, only the accommodation sector lends itself well to a fruitful and quantified analysis concerning its social impact in this area. The large number of accommodation units on the one hand and the relative availability of data on salaried employment on the other hand justify this approach.

However, the insufficient collaboration of officials of the competent public administrations regarding access to the turnover sought forced us to use the paid service of private companies, specializing in legal and financial information on Moroccan companies. This is how we created the required database (Table 1).

Table 1. Distribution of tourism businesses selected by commune

Commune	Number of tourism companies
Saïdia	16
Nador	12
Total	28

Source: Author, 2019

The process of estimating the wealth created by tourist activity is very delicate. Studies have highlighted the limits of using turnover to estimate the direct impact of tourism on a given territory (DGCIF, 2012). The difficulty of subtracting certain charges and expenses of companies, which depend on the nature of the data available, is an example to cite. Therefore, we will favor taking into account turnover excluding taxes (ex-tax) as the overall volume of tourist activity.

Results and Discussion

Economic Impact: Insufficient and Unstable Wealth Creation

Overall, a simple comparison of the turnover figures achieved by tourism companies in the CMO with those of the Agadir coast makes it possible to account for the low volume of tourist activity in the study area (Figure 1). Indeed, in 2010, the total tourist turnover of Agadir was 7.21 times greater than that of the CMO, or respectively 11.52 million and 1.59 million US dollars. Certainly, this difference continues to diminish over the years, but the total amount of sales of services by companies in this area remains mediocre.

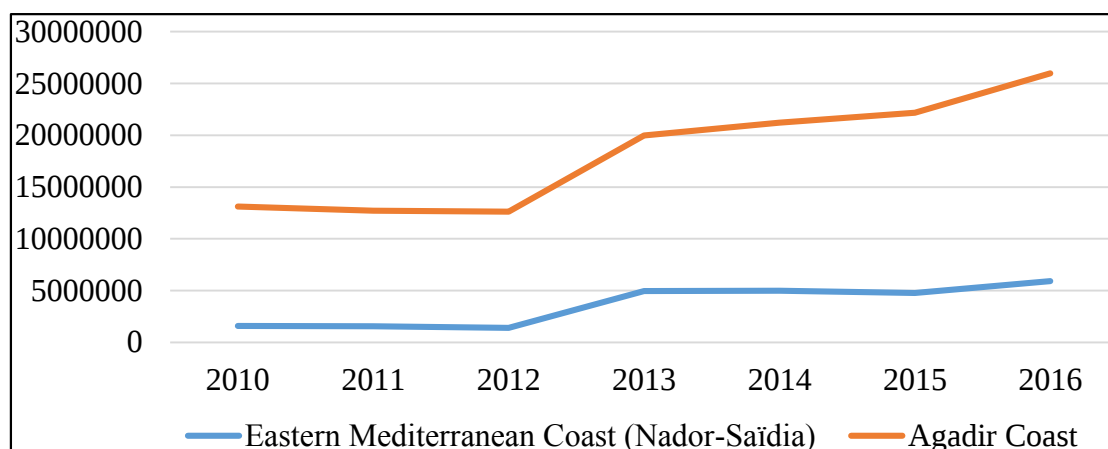


Figure 1. Evolution of turnover (ex-tax) of tourism companies in the CMO and the Agadir coast between 2011 and 2015 (in US dollars)

Source: The author, based on company data from InfoRisk and Charika, 2019

In 2016, the total turnover of CMO companies was 3.4 times lower than that of Agadir companies. These data raise two paradoxical observations: an increase in the number of companies operating in the CMO, without necessarily translating into a considerable increase in the volume of activity. Furthermore, unlike Agadir where activity quickly resumed after the stagnation of 2011-2012, in the CMO, this activity has not managed to regain such a trend despite recent tourist developments. Rather, it experienced a real slump, even a slight decline in 2015. This stagnation is particularly due to the very tense socio-political context which characterized the country during the protests of the “February 20” movement, triggered as part of the “Arab Spring”.

Despite the low volume of activity, the coast studied has recorded strong development since 2010, surpassing that of Agadir with average annual growth rates (CAGR) of 20.53% and 8.25% respectively, between 2010 and 2016. This development was particularly notable in the NSTS, reaching an increase rate of 23.4%. This confirms the fact noted above, which is explained, among other things, by the establishment of new tourist units, particularly in Saïdia, where the seaside attraction has recently been improved.

Table 2. Volume of activity and average value per company on the EMC in 2010 and 2016 (US dollars)

Touristic site	Nador		Saïdia		Agadir	
Year	2010	2016	2010	2016	2010	2016
Turnover ex-tax	1200813.2	3489159.2	397669.3	2418451.9	11520305.5	20063322.5
No. of companies	5	9	7	13	12	15
Turnover ex-tax/ company	240162.64	387684.35	56809.91	186034.76	960025.46	1337554.83

Source: Author, 2019

Given that the structure of tourist activity on this coast is not entirely homogeneous, it is appropriate to qualify this analysis by taking into account the number of tourist units retained for each site (Table 2). In reality, the disparity between the two areas is much greater if we take into account the number of tourist units, particularly in Saïdia. Thus, the average value of turnover achieved per company in Agadir was 16.9 and 7.2 times greater than in Saïdia, respectively in 2010 and 2016.

Naturally, the volume of activity experienced a significant increase between the two dates adopted in all the sites studied, which represents a logical consequence of the increase in the number of tourist companies, particularly in Saïdia. The analysis of this table as well as information relating to the nature of the activities carried out by the companies, allows us to notice an effort of adaptation, motivated by the irregular nature of the activity on the part of these CMO companies. A significant number of them opt for diversification of their service provision by specifically offering accommodation, catering-cafes and tourist entertainment. This is especially the case for those located in Saïdia, the leading seaside tourism destination in the CMO. For example, the company “Firdaous Eden Club” specializes in the rental of equipment used for water sports in addition to the management of a restaurant-bar.

Furthermore, a comparison between the two main tourist sites in the studied area, Saïdia and Nador, shows a relative superiority in terms of average value for the benefit of the latter city. Thus, the five companies in Nador achieved a higher volume of turnover than that of the seven companies in Saïdia in 2010. The sustainability of tourism in Nador compared to the exclusive seaside tourism of Saïdia helps explain this superiority.

Despite the improvement in the volume of tourist activity in the CMO, it remains far from the exploits of other Moroccan seaside destinations such as Agadir, despite its competitive advantage in terms of proximity to Western Europe, the main focus, transmitter of international

tourists visiting Morocco. Seasonality is the main explanatory factor of these blatant disparities in terms of volume of activity, on the one hand between this coastline and that of Agadir in particular, and on the other hand, between the two tourist centers of the CMO, Saïdia and Nador.

A Pronounced Seasonality

Tourist demand recorded in CMO classified accommodation establishments is particularly concentrated in Nador and Saïdia. The seasonality of tourist arrivals is a reality. The summer months, particularly July and August, constitute its high season (see Figure 2). However, this reality is not uniform and requires further clarification.

Unlike Nador which experiences a certain regularity in tourist arrivals at its accommodation establishments classified in previous years, so that the gap between the high and low season figures is not very large Saïdia is characterized by a very pronounced irregularity. Indeed, the gap between its two extreme seasons is notable (Figure 2). For example, in 2011, Saïdia welcomed 87.8 times more tourists in the month of July than in March (23528 compared to 268), while Nador received 1.7 times more visitors in July of the same year than in February (Oujda Regional Tourism Delegation, 2016).

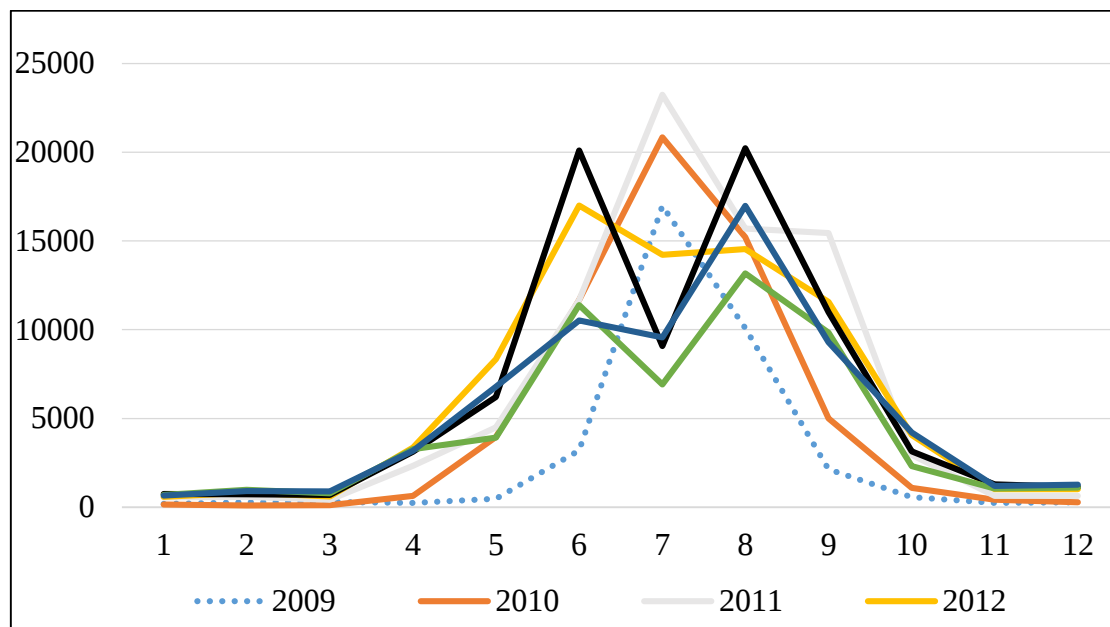


Figure 2. Seasonality of tourist arrivals in classified accommodation establishments in Saïdia

Source: Oujda Regional Tourism Delegation, 2016.

From 2011, we noticed a downward trend in tourist arrivals during the high season in Saïdia, particularly in 2012 and 2013. In addition to the impact of the socio-political context of 2011 mentioned previously, this regression can be explained by the effect of month of Ramadan, a period during which seaside tourism, being the only tourist activity on this coast, is not often practiced by internal tourists, who constitute its main clientele. This regression is generally offset by an increase in arrivals during the other months, as is the case in June in Saïdia.

It is also important to note that arrivals recorded in Nador tend to become more uniform, while the summer season in Saïdia tends to lengthen to five months (from May to the end of September). However, this development remains insufficient to overcome the harmful effects

of seasonality: the resort of Saïdia, where seaside tourism constitutes the only economic activity, becomes a ghost town during the seven months out of season.

A Discordant and Unfavorable Social Impact

The benefits of tourism must also be studied on a social level. The development of tourism in a region is often praised for its ability to significantly create jobs. The importance of these jobs depends on how these activities operate. Seasonality can influence the nature of jobs and the prevalence of each type (seasonal, permanent, etc.). It is also appropriate to examine training for tourism professions in the Oriental region in general and its links with the structure of employment created and the training infrastructure.

As a whole, the impact of this sector (all categories of tourist accommodation establishments combined) on the formal employment situation is very limited. In fact, in 2014 it employed around 1233 person, or 2% of the active population of the municipalities concerned according to the last general population and housing census (GPHC) of 2014. These figures are even lower if we take into account the previously mentioned seasonality.

Paradoxically, the employment positions identified in the accommodation sector include almost as many permanent (PE) as seasonal workers: respectively 50.84% and 49.16% of jobs in 2014 (Table 3). This fact is not specific to the area studied, it is also noted in certain key destinations of Moroccan tourism, such as Marrakech where the rate of seasonal jobs, presenting a certain precariousness, is around 40% in the hotel industry (Ibourk & Al Alaoui El Wahidi, 2014).

Table 3. Employments in the tourist accommodation sector in the CMO (2014)

Commune	Beds	Active Population (AP)	PE	Seasonal		Total	E/B	Employment / AP
				Number	Equivalent (PE)			
Nador	3075	59499	332	288	96	384	0.14	0.65%
Saïdia	14010	3247	306	329	110	439	0.03	13.52%
Total	17085	62746	638	617	206	823	0.17	1.31%

Source: GPHC of 2014, Oujda Regional Tourism Delegation, 2016 + personal survey

It is obvious that the seasonal nature of the CMO's tourism activity has a direct impact on the type of jobs that are created there. The number of these jobs does not actually exceed 823, which represents only 1.31% of the active population concerned. These figures are obtained by converting seasonal jobs into permanent jobs that work full time (Table 3). This conversion is carried out under the assumption that seasonal employment lasts only four months per year (from June to September). This method is recommended by certain researchers, notably Hillali (1985), in order to avoid overestimation of jobs by classifying seasonal workers as employees working full time.

The predominance of the two tourist centers of the CMO (Saïdia and Nador), in terms of tourism infrastructure and demand, generates a similar situation with regard to job creation. Certainly, these two sites alone account for 92.3% of jobs in the accommodation sector in 2014. However, the socio-economic impacts of these jobs differ between the two sites. This incidence is relatively remarkable in Saïdia, affecting 13.52% of its active population, while it is almost negligible in Nador, affecting barely 1.31% of its active population, due to the large number of its residents.

In any case, the figures and employment rates illustrated in the table above do not necessarily mean that the local population actually benefits. For example, high-end hotels in Saïdia tend to temporarily recruit interns mainly from the Institute of Hotel and Tourism Technology of Saïdia (IHTTS), without a contract and with modest remuneration. In addition,

the majority of these interns come from other regions of Morocco. Likewise, other experienced employees, particularly from other Moroccan tourist destinations, are recruited in Saïdia for their expertise. High-end establishments in Saïdia thus have a few senior executives and technicians, such as chefs (the case of the Iberostar hotel). This phenomenon has also been mentioned by certain researchers, notably Kagermeir (1998), in his article on tourism in Ouarzazate.

It appears from the table below that the number of jobs per bed is almost negligible (0.05 E/B) in the CMO: it takes 20 beds to create one job. These coefficients differ from one site to another and highlight the impact of the sector on employment. Unexpectedly, it is the seaside resort of Saïdia which displays the lowest ratio (0.03 E/B). This situation is explained by the closure of large accommodation units due to the tourist seasonality, thus forcing them to reduce their activity or completely cease their operation for six months, for large approved hotels.

According to the Oujda Regional Tourism Delegation (2016), the composition of the bed capacity of this city is characterized by a large proportion of beds in tourist residences and campsites, around 62% of beds in Saïdia, which do not require lots of salaried jobs. This calls into question the structure of tourist accommodation in this resort, supposed to be the engine of socio-economic development for the entire region. In this sense, Berriane (2009) questions the real benefits of these new forms of tourist accommodation, which generate few jobs.

On the other hand, relatively satisfactory coefficients are noted in both rural and urban tourist locations. Their common characteristic is the fact that most of their tourist activity does not depend solely on seaside tourism, which experiences strong seasonality. Nador benefits from its commercial reputation and its status as the provincial capital, as well as its proximity to the port. These situations favor stability in tourist demand throughout the year and, consequently, job creation that is proportionately significant in relation to the number of beds available. Thus, one permanent salaried job is generated for every seven beds in Nador.

This analysis reveals that the impact of tourist accommodation is dependent on three main factors: the nature of the tourist activity (seaside or other), its sustainability during the year and the structure of accommodation capacity. The following table allows us to explore this last point in more detail.

Table 4. Distribution of jobs in tourist accommodation in the CMO according to type of unit

	Beds	Employment				PE/Bed
		Permanent	Seasonal		Total	
			Number	Equivalent (PE)		
5*	3146	208	221	74	282	0.09
4*	470	93	102	34	127	0.27
3*	396	58	55	18	76	0.19
2*	458	46	45	15	61	0.13
1*	110	11	7	2	13	0.12
Unapproved hotel	1746	139	96	32	171	0.10
Motel	110	13	4	1	14	0.13
Tourist residence	2452	80	80	27	107	0.04
Camping	9399	45	52	17	62	0.01
Total	18287	693	662	221	914	0.05

Source: Oujda Regional Tourism Delegation, 2016 + personal survey

Classic hotel accommodation has relatively acceptable coefficients (0.12 E/B), although they remain far from the performance of Agadir which exceeds 0.36 E/B (Hillali, 1985). In

other words, salaried employment is created by more than 8 beds in the CMO, while it is only generated from less than 3 beds in Agadir only.

If the majority of approved hotels achieve relatively satisfactory ratios, particularly for the 3 and 4 stars categories, located especially in Nador, high-end establishments (5 stars) located in Saïdia as well as non-approved hotels record worrying coefficients. This confirms on the one hand the inability of tourism focused exclusively on traditional seaside resorts and weakened by seasonality in Saïdia, to create the jobs expected by the investments, and on the other hand reveals the critical situation of non-approved hotels continued to the decline of informal trade (smuggling) in Nador. As a new form of tourist accommodation in the CMO, motels have satisfactory ratios thanks to their location along the Mediterranean ring road, which ensures continuous activity throughout the year.

Training for Tourism Professions in the Oriental Region: A Clear Insufficiency

Nowadays, training constitutes a crucial issue for the economic development of the tourism sector (Bonal, 2006). We are looking at training for tourism professions in the Moroccan Oriental region to determine whether it has been able to align with the recent dynamism of the sector, particularly along the coast. Such membership would make it possible to provide the required profiles, both in quantity and quality, to meet the demands of the northeast Moroccan destination.

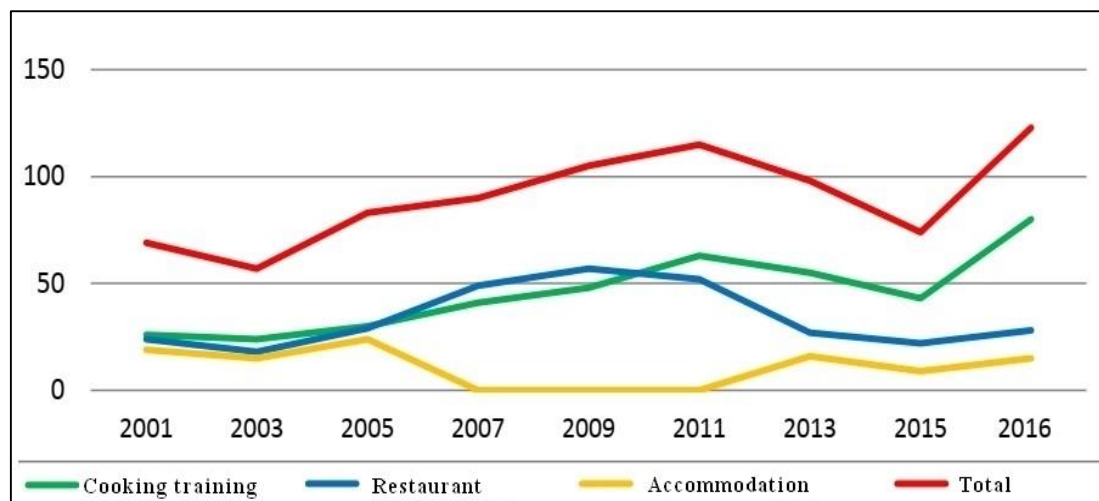


Figure 3: Evolution of the number of winners from the Saïdia Institute of Hotel and Tourism Technology

Source: IHTTS, 2017

Among the fifty professional tourism training establishments in Morocco, the Oriental region has only one establishment: the Institute of Hotel and Tourism Technology of Saïdia (IHTTS), inaugurated in 1998. Equipped with an initial capacity with 270 educational places in boarding schools, this institute offers training for specialized technicians in three sectors: accommodation, cooking and catering. After seventeen years of operation, the institute remains underutilized: only 1270 technicians have been trained, or an annual average of 74 young people. The attractiveness of this establishment among young people from the Oriental remains insufficient: according to its director, the share of those admitted from the region has not exceeded 54% on average since its creation.

However, the pace of training is not uniform. A slight increase in the number of winners was noted from 2007, before falling again in 2011. This increase is mainly due to the performance achieved in the cuisine sector which also saw the introduction of pastry. For

example, the number of winners in this last sector represented almost 60% of the total in 2014, or 50 out of 86 graduates, including 14 in pastry. This means that the institute has not succeeded in taking advantage of the benefits of the tourist dynamism of the coast in question, particularly in terms of the creation of new sectors (animation, senior and middle management, etc.) and an increase in the number of young people trained, particularly in the field of accommodation. However, recent tourist facilities should have improved the situation of professional training in tourism professions, since they offer both internship and employment opportunities nearby.

If no other training establishment for tourism professions has been created in the region and no new sector in this area has been integrated into local professional training institutes, the Mohamed Premier University constituted a notable exception. Indeed, from 2010, professional licenses were created there: this is the professional license "Tourism Management" introduced within the faculty of legal and economic sciences, as well as two other training courses offered by the Oujda Higher School of Technology (Azzi, 2008). In addition, a professional master's degree entitled "Tourism and Heritage" was created in 2012 at the Faculty of Letters and Human Sciences of Oujda, aiming to improve the training of students from different licenses. Finally, the effort in terms of training for tourism professions in the region has not kept pace with tourism development. This also demonstrates a limited interaction between this development and job creation, which reduces the attractiveness of existing training for young people in the region.

Conclusion

In conclusion, assessing the socio-economic implications of tourism on CMO is not an easy task, but our attempt proved fruitful. On the economic front, there has been a significant increase in the volume of activity (turnover) of tourism companies. However, this volume remains insufficient in comparison with that of key destinations, notably the coast of Agadir. Regarding the average value of wealth created per company, it is Nador which predominates in the coast studied to the detriment of Saïdia which finds itself weakened like other seaside sites with unique tourist activity. The vulnerability of these companies arises from the phenomenon of very pronounced seasonality. To overcome this constraint, many companies have opted for versatility by diversifying their service provision.

On a socio-economic level, the impact of tourism on employment in the CMO is very low, representing only 0.91% of the active population of the municipalities concerned. Nador and Saïdia monopolize almost all of these jobs (92.3%) in an equitable manner, except that the impact on the active population is more sensitive in Saïdia (13%) than in Nador (0.72%). However, this reality does not necessarily ensure that the local population actually benefits. The employment coefficient per bed does not exceed 0.05 E/B in the coast, which means that 20 tourist beds are needed to create a single job. Paradoxically, Saïdia has the lowest ratio (0.03 E/B), due to the closure of accommodation units for a large part of the year due to seasonality, and the predominance of residences tourist and campsites in its reception capacity, which require few employees. On the other hand, these coefficients are more favorable in other sites which do not depend exclusively on seaside tourism, such as Nador, where one job is generated by 7 tourist beds. The officially approved hotel industry records satisfactory ratios even if they remain lower than those of Agadir. It should be noted that no new training establishment for tourism professions has been created, especially since the only institute in the region remains under-exploited, which reflects the lack of coordination between the activity tourism and job creation in the sector.

Ultimately, it appears that tourism investments, to which many hopes had been attributed for the development of the Moroccan north-east, proved incapable of constituting a real engine of socio-economic development for the region, due in particular to the pronounced seasonality of the activity.

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