

CLUTURAL HERITAGE IN ALGERIA: A CRUCIAL DETERMINING FOR TOURIST ATTRACTIVENESS AND COMPETITIVENESS?

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Abstract

Like many countries in the world, Algeria is struggling to find its place in global tourism competitiveness market. this article aims highlight the role of Algeria's both natural and cultural heritage resources as part of the Maghreb, based on the methodology of ranking countries according to their travel and tourism competitiveness specific to the World Economic Forum. In addition, the study also attempts to point out the influence of other indicators on this competitiveness, and to broach the limitations of this tool -Tourism and Travel Competitiveness Report- in terms of the distribution of indicators and the choice of variables in the tourism competitiveness assessment process.

Key words: *cultural heritage; natural resources; tourism; competitiveness; tourism attractiveness; indicators, TTC index.*

JEL Classification : L83- P52- Z10

I. INTRODUCTION

It has been universally proven that the tourism, especially in its cultural dimension, is a lever for growth and investment for development (sources of income, foreign exchange receipts and job opportunities), that's why most countries have decided to reconsider it at their development strategies. Among others, Algeria is one of those countries that want to enter into force in this global tourism market.

Having all the assets that a territory can offer to ensure attractiveness and tourism competitiveness: a temperate climate, a rich heritage with multiple civilizations (ancient and Arab-Muslim vestiges), home of cities with incomparable and multivariate historical potential (old centers and medinas, variety of architectural styles) with multiple geographical characteristics (coastal, mountainous, and desert cities). Algeria, therefore, should attract local and international tourists. However, in a global, continental or regional competitiveness, relying only on local resources remains a partial strategy. This nature of competitiveness requires a set of indicators to be provided rationally.

However, it is imperative for Algeria to embark on a factor analysis based on an indicator system to support its competitive development in the field of tourism.

Since 2007, the World Economic Forum (WEF) has produced an annual report on the competitiveness of travel and tourism TTC (Tourism and Travel Competitiveness Reports), the main objective is to measure the factors and indicators of tourism

competitiveness of countries. The evaluation of all the scores obtained by the country claiming to compete, aims to identify the levers allowing the improvement of attractiveness and competitiveness, and consequently the identification of the main obstacles affecting the positioning. The European Commission has been working with the Member States on a number of issues relating to travel and tourism in the world.

Algeria is ranked among the top six most improved countries in the travel and tourism sectors; it has been reported, according to a report published in 2017, that Algeria has strategically opted for the development of tourism as a secure economic value. It also took into account all the indicators adopted by the TTC reports, in order to impose its place in the Maghreb region, and therefore in the global tourism market. However, this option did not improve its ranking ahead of the two pioneers of the Maghreb tourism namely Morocco and Tunisia. Despite these two neighboring countries are providing a similarity of historical-geographical context and cultural sub-base, they are attracting larger tourist flows, and above all, they are generating considerable revenues.

For this purpose, a comparative study based on the evaluation of the indicators ensuring the attractiveness and competitiveness of these countries seems to be the judicious way to define the development axes of tourism activity, and to highlight the role of heritage resources in tourism competitiveness assessment process.

II. THE DETERMINANTS OF TOURISM ATTRACTIVENESS AND COMPETITIVENESS

Nowadays, tourism research is focusing on the analysis, evaluation, and measurement of tourism attractiveness and competitiveness, and several researchers put the light on identifying many factors, in order to justify destination choices, which are often known as: determinants, criteria, indicators, pillars, attributes or variables

Natural and cultural heritage resources have been identified as the key indicators for tourism attractiveness. These resources with tourism infrastructure and services have been sorted by (Gearing, Swart, & Var, 1974) in five classes (encompassing 17 pillars):

- Natural attributes (landscape, climate, fauna and flora, waterfall, river, lake or sea, etc.),
- Socio-cultural particularities (architecture, religion, traditions and customs, local culture, art and music, gastronomy and festivals).
- Historical features (ruins, archaeology, etc.).
- Tourist attractions and leisure
- Tourism infrastructure and services.

In his book entitled "The tourist", (MacCannell, 1976) also supported the value of heritage resources, by specifying the importance of authenticity and uniqueness of his tourism products (natural and cultural assets and attractions) in tourist brochures and guides.

The safety of tourists and the competitiveness of prices constitute other determinants of attractiveness, and added to the previous list for the first time by (Ritchie & Zins, 1978).

According to our research objectives we realized that several researches has subsequently begun to proclaim the importance of safety in the evaluation of tourism attractiveness and competitiveness, like the works of (Mansfeld & Pizam, 2006), (Donaldson & Ferreira, 2009), (Hapenciuc, Stanciu, Condratov, & Nistoreanu, 2009), (Hall, Timothy, & Duval, 2012), (George & Booyens, 2014), (Baker, 2015), and (Magliulo, 2016).

The competitiveness price attribute, meanwhile, was suggested in several researches confirming its relevance in the choice of destinations such as (Dwyer, Forsyth, & Rao, 2000), (Dwyer, Mistilis, Forsyth, & Rao, 2001), (Mangion, Durbarry, & Sinclair, 2005).

(Middleton V. , 1989) extended the list of (Ritchie & Zins, 1978), by raising the issues of tourism and travel policies and the image of the destination concerned. The importance of the destination's image was then discussed by (Chon, 1990), (Fesenmaier & MacKay, 1996), (Govers, Go, & Kumar, 2007), and (Puh, 2014).

Concerning the role of policies in the development of tourism, it was supported by the work of (Inés Sánchez & Jaramillo-Hurtado, 2010), (Vanhove, 2002) which both highlighted the importance of heritage rehabilitation and preservation policies in the development of the tourism industry,

since natural and cultural resources represent the key elements of factor conditions.

The concept of competitiveness has been deeply discussed by (Porter, 1990) which enriched the literature about competitiveness by identifying both an attribute of innovation and the use of new technologies in the world of competitiveness.

It should be cited that the innovation attribute was previously added to the different categories mentioned above (Hu & Ritchie, 1993).

These two authors have introduced for the first time the tourism competitiveness concept without defining it; However, (Crouch & Ritchie, 1999) developed it as "the ability to add value to destinations and to increase revenues and wealth". In order to demonstrate the importance of Natural and Cultural Resources included in tourism competitiveness, (Crouch & Ritchie, 1999) relied mainly on Heckscher-Ohlin's comparative price theory when considering a tourism product that generates foreign exchange while creating employment.

This point of view was supported by (Zeppel & Hall, 1991) (Van der Borg, Costa, & Gotti, 1996), (Timothy & Nyaupane, 2009) et (Loulanski & Loulanski, 2011) in their research on the relationship of culture and history with tourism.

The research of (Crouch & Ritchie, 1999) also focused on the implementation of these relationships in a socio-economic model allowing exploitation while preserving the natural capital of the destination for future generations. At this precise moment, we are noticing the birth of a new attribute of competitiveness in the category of the Tourism and Travel (T&T) regulatory framework, it's about sustainability. However, the emergence of this concept was previously raised in studies by all of (Inskeep, 1987), (Inskeep, 1991), and (Middleton V. , 1997) who considered environmental quality as an essential factor for tourism development.

Similarly, (Hong-bumm, 1998) introduced the notion of a clean and peaceful environment into tourist attractiveness, addressing several new attributes such as: clean water, air, environment, health and hygiene.

This is how, from attractiveness to tourism competitiveness, the evaluation indicators have been combined, and the two concepts are articulated or even brought together as the same factors affecting tourist attractiveness necessarily act on the competitiveness of destinations (Cracolici & Nijkamp, 2009). However, the indicator of heritage, natural and cultural resources is starting to find its limits in quantitative assessment approaches, as mentioned in the research of (Gooroochurn & Sugiyarto, 2005) which excludes historical and cultural attributes by stating the difficulty of measuring and evaluating them. This is the main reason for their exclusion from the list of indicators of the Global Competitiveness Reports published since 2004 by the World Economic Forum. (WEF).

However, in 2007, natural and cultural resources reappeared in the WEF indicator lists, which added new

perspectives to the notion of tourism competitiveness in its annual reports on the Travel and Tourism Competitiveness (TTC Report). The latter shared the same definition of tourism competitiveness as defined by (Crouch & Ritchie, 1999), and presents for researchers, policy makers and across all assessment indicators, a raw database and analyzed results for 138 countries around the world. This tool (TTC Reports) has become from a researchers' point of view ((Mazanec, Wöber, & Zins, 2007), (Mazanec & Ring, 2011) et (Assaf & Josiassen, 2011)), to a very important instrument for explaining and forecasting the tourism performance of host countries, and "one of the most used international tourism competitiveness assessment instruments" (Costea, Hapenciuc, & Bejinaru, 2016).

Methodological Aspect of the Research

All the interest of our problematic focuses on the identification of indicators measuring the attractiveness and competitiveness of destinations, with regards to the crucial role of natural and cultural resources.

In order to identify the importance of these heritage resources in the tourism competitiveness indicator list's in the Maghreb countries, namely Algeria, Morocco and Tunisia, it was essential for us to choose global attributes and to obtain hard data. These criteria are well provided by the TTC Reports, which until now introduces itself as helping tool for tourism competitiveness assessment and classification through its methodological framework. Accordingly, the five major indicators of the TTC Index have been used to determine factors enabling Tunisia and Morocco to have the title of the best destinations for Europeans (in 2019, 87.5% of foreign tourists in Morocco are European). We also try to underline the place of heritage in this development, and also identify the action and / or inaction of Algeria in the field of the tourist industry during the last twelve years.

III. CULTURAL HERITAGE IN THE TTC REPORTS METHODOLOGY

III.1. Cultural Heritage: A Major Determinant in the Choice of Destination

According to the TTC Reports of 2019, and following the analysis of the correlation between the pillars and tourist flows, two tourist profiles have been distinguished. Indeed, the tourist visiting the developed countries does not select the destination according to the same criteria as the tourist who visits the countries with average or poor economy.

Table 1. Ranking priority of the 14 pillars of competitiveness and tourist attractiveness for the two tourist profiles.

Indicators	Pillars of competitiveness and tourist attractiveness of destinations	Middle / poor economy countries	Rich countries
Resource quality indicator	Cultural resources	2	1
	Natural resources	11	2
Infrastructure quality indicator	Air transport infrastructure	1	4
	Tourism infrastructure	3	3
	Land transport infrastructure	4	5
Tourism policy indicator	Prioritization for travel and tourism	5	9
	International openness	8	8
	Competitive prices	9	14
	Environmental sustainability	14	11
Business environment indicator	Business environment	12	13
	Safety and security	13	12
	Health and hygiene	10	6
	Human resources	6	7
	TIC infrastructures	7	10

Source: Prepared by the author from the correlation of the TTC pillars with tourism arrivals

When visiting the Maghreb countries, the tourist is indeed mainly looking for a cultural destination, but it is the air transport infrastructure that is primarily involved in the choice. It tries, then, to meet its needs in terms of infrastructure and tourist services such as (accommodation, catering and land transport). Prioritization of tourism, travel and human resources appear to be essential parameters in choice making (ranked 5th and 6th among the fourteen pillars of competitiveness and tourist attractiveness of destinations).

The infrastructure equipped with ICTs and the country's openness to the international market, specifically, the acquisition of VISA increases the attractiveness of the country (ranked the 7th and the 8th position). Contrary to what is said, price competitiveness does not seem of with great importance for this tourist (9th), because the reality and the economic conditions of the host countries, are in favor of offering tourist a large exchange rate, and allowing him to spend a high standing stay at a lower cost.

The pillars of health and hygiene, natural resources, business environment, and safety are the last criteria, all with the pillar of environmental sustainability, which is not on its list of choices. This ranking is conditioned by tourists who do not seek ecological destinations in these countries, but rather a characterized cultural experience. The results of this correlation analysis demonstrate the importance of cultural heritage in the tourist attractiveness and competitiveness, and in particular the interest that tourists have for these resources.

III.2. The place of Natural and Cultural Heritage Resources in the Methodology of the TTCR¹

The Ranking of countries in the TTCR represents the total sum of the scores of the various indicators of tourism competitiveness. In its methodology, this tool has undergone several changes since its first appearance, hence the modification of indicators, pillars and variables. From 2007 to 2013, the (TTC index) was based on three main indicators, from which emerge fifteen (15) pillars and seventy-nine (79) variables. These major indicators are:

- The regulatory framework for tourism and travel.
- The business environment and tourism infrastructure.
- Human, cultural and natural resources.

In 2007, it was observed that natural and cultural resources were combined in a single pillar. In 2008 they were separated and assessed individually. During this period, the value given to each of the 3 indicators is 33.33%. We point out that the assessment of natural and cultural resources, both of which are the main reason for the trip, each had a share of 5%, which is a value equal to that of the other indicators, and is carried out only by 3 variables on all 79.

from 2015 these reports experienced a fundamental change in its methodological frameworks, represented by the reorganization of the previous indicators into four main indicators instead of three, with 14 pillars and 90 variables (including 10 for heritage resources):

- The business environment.
- The regulatory framework for tourism and travel.

- Tourist infrastructure.
- Natural and cultural resources.

Consequently, the measurement of natural and cultural resources is counted as a major indicator with a share of 12.5% for each of the resources (pillars) representing the greatest valuation value.

This new position of natural and cultural heritage resources testifies on one hand the weight of this indicator in relation to the various pillars, and on the other hand, its role in the attractiveness and competitiveness of destinations.

However, this remains insignificant compared to other pillars which are measurable by 12 variables for the business environment, or 10 variables for environmental sustainability.

It should be claimed that the value given to natural and cultural resources by the National Institute for Tourism Research and Development of Romania (INCTD) is 70% (40% for natural resources and 30% for cultural resources), which is in itself considerable.

IV. COMPARATIVE ANALYSIS OF THE ASSESSMENT OF TOURISM COMPETITIVENESS FOR ALGERIA, MOROCCO AND TUNISIA

IV.1. Overview of the tourism performance of the Maghreb countries

Algeria, the largest country in Africa, cannot be compared to Morocco and Tunisia, which are considered as star destinations for tourism in the Mediterranean. By analyzing the data, tourism and travel competitiveness reports and the variation in the ranking of the three Maghreb countries over the last twelve years (from 2007 to 2012) (see Figure 1), we observe the strong tourism competitiveness that 'imposes this tool (TTCR) in the tourism market.

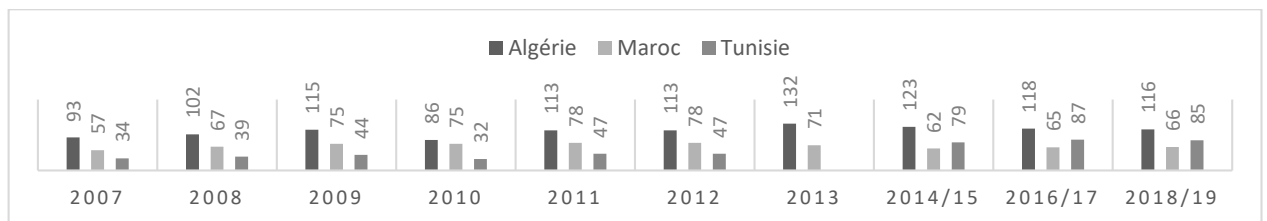


Figure 1 Classification variation of the three countries from 2007 to 2019

Source: TTCR data from 2007 to 2019

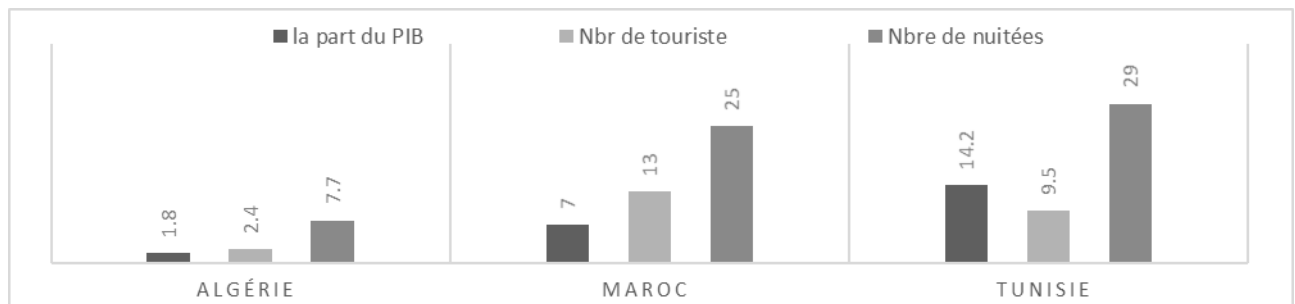
This competitiveness is reflected in the ranking of Algeria from 93 in 2007 to rank 116 in 2019. It still remains behind Morocco by 50 places (ranked 66 in 2019) and behind Tunisia by 31 places (85 in 2019).

Regarding tourist overnight stays, Tunisia is ranked first with 29 million overnight stays, followed by Morocco with 25 million, while Algeria recorded only 7.7 million overnight stays during 2019. These data explain the tourism receipts of these countries in

the distinguished GDP.

In terms of tourist flow, Morocco is ranked first in the North Maghreb country with 13 million tourists (a positive growth rate of 5.2% compared to that of 2018) followed by Tunisia with 9.5 million tourists (a positive growth rate of 13.6% compared to that of 2018). While Algeria received only 2.3 million tourists during the same period (with a negative growth rate of -10.77%).

¹ Tourism and Travel Competitiveness Reports



Source: Data provided tourism Ministries of the Three Countries

Figure 2 - Tourism in 2019 by data: Algeria, Morocco and Tunisia.

Yet, it should be noted that among the 9.5 million tourists visiting Tunisia during 2019, 2 million are Algerians. This reflects the success of the Tunisian tourism strategy regardless the Algerian local tourism development strategy.

IV.2. The Quality Of Algeria's Cultural and Natural Resources in The Maghreb

Despite the richness of the Algerian territory in

exceptional natural assets along its coast (more than 1500km), the diversity of its relief and the depth of its Sahara, this great African country moved from the rank 97 in 2008 to 124 in 2017, behind Tunisia which kept its 94 place, and Morocco which improved its place by 81classes (1st of the three Maghreb countries). Despite all its impressive vestiges and heritage potential, Algeria is ranked 53 behind Morocco, 41 (see table 2).

Table 2- Pillars of the Quality of Resources Indicator: Algeria, Morocco and Tunisia score and rank between 2008 and 2017

	Algeria				Morocco				Tunisia			
	Rank 2008	Score 2008	Rank 2017	Score 2017	Rank 2008	Score 2008	Rank 2017	Score 2017	Rank 2008	Score 2008	Rank 2017	Score 2017
Natural resources	97	2.6	124	2.2	118	2.2	47	3.6	94	2.7	94	2.5
Cultural resources	55	2.6	53	2.1	48	3	41	2.5	83	2.9	83	1.5

Source : TTCR data between 2008 and 2017

It has to be mentioned that these results do not represent the richness of the Algerian heritage, but rather the measurement of certain variables of natural and cultural resources.

The ranking of these countries does not necessarily represent the deterioration in the quality of their resources, nor their poverty. First, it comes down to improve the evaluation criteria in a framework of continuous competitiveness between the different countries of the world. Second, it introduces the new evaluation variables by the WEF. However, the rise in the ranking is the result of an efficient strategy of developing heritage resources for tourism purposes. As a result, it is not enough to have natural and cultural resources to attract international tourists, but rather to conquer the international supply, and to take into account the ranking criteria of cultural and natural resources indicator.

IV.3 Assessment of the Variables of Algeria's Natural Resources in The Maghreb

The measurement of natural resources in the TTC index is done by evaluating five variables as mentioned below:

- **The number of Natural World Heritage sites** : With only one natural site classified and

protected, Algeria is in 78th place before Morocco 86th (which has no site classified) and behind Tunisia in 46th place which also has only one site classified. This difference in ranking between Tunisia and Algeria is reflected in the influence of the other pillars on natural resources.

- **The Total Number of Known Animal Species** : Algeria is in 2nd position in the Maghreb and 83 in the world behind Morocco (77th) and ahead of Tunisia (94th).

- **Total Protected Areas** :

Algeria is ranked 104th in the world and 2nd between Morocco which is 14th worldwide and Tunisia in 114th.

- **For Digital Demand** :

Algeria, is ranked last in the Maghreb and 99th in the world. This reflects the deficiency of its digital marketing compared to Morocco which is the 1st in the Maghreb and the 24th most requested natural destination in the world, and to Tunisia which is in 59th place.

- **The Attractiveness of Natural Places** :

It is evaluated on 7 points (best score) by citizens of each Maghreb country. They assess the wealth of natural assets that can attract an international

tourist (beaches, parks, mountains, Sahara, etc.).

Algeria is ranking 109th in the world and the last in the Maghreb. It reflects that the largest country in Africa has not highlighted its uncountable natural resources, which indicates the ignorance of the Algerian citizen of the wealth and the specificity of its

territory.

While Morocco is ranked 1st in Maghreb region and located in 42 in the world, followed by Tunisia classified in the 83 position

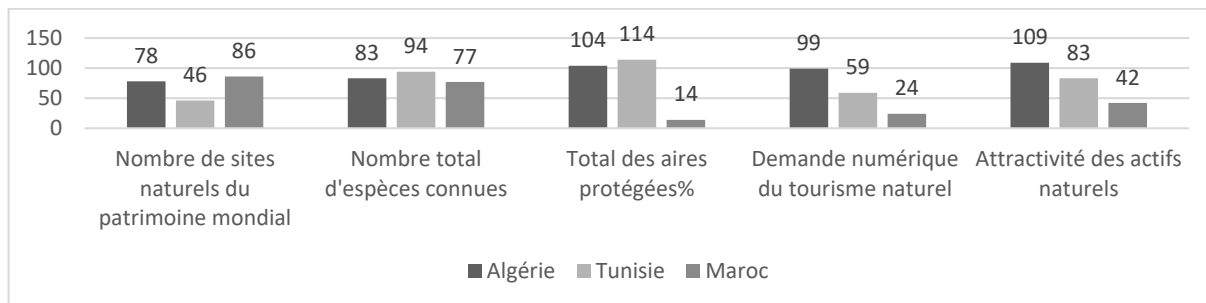


Figure 3-Natural resource variables of Algeria, Morocco and Tunisia in 2017

Source: 2017 TTCR data

IV.4. The Variables of The Pillar linked to Algeria’s Cultural Resources in The Maghreb

It is established by measuring the following 5 variables:

• **Number of Cultural World Heritage sites**

The 35th place for its 7 sites, did not allow Algeria to improve its score in the Maghreb. It is ranked behind Tunisia which is in 30th position and Morocco which is in 22nd place with its 9 classified sites. However, it shares the 25 place in the world and the 1st place in the Maghreb with Morocco, in terms of cultural, and intangible heritage.

• **Number of Major Sports Stadiums**

Algeria is classified 29th in the world followed by Morocco in 31st place and Tunisia in 55th place. This ranking did not allow it to host large-scale sporting events such as the African Cup (since 1990) since it is not a question of having major stadiums, but rather of having a whole strategy of management, organization,

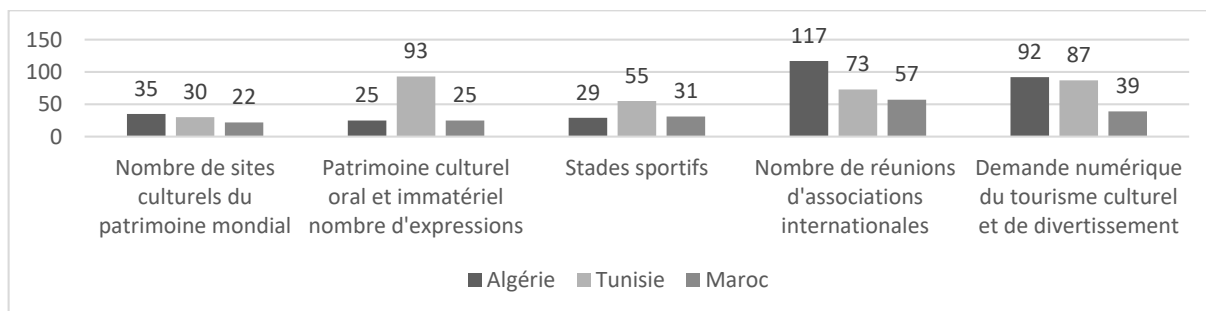
air transport infrastructure, land transport, accommodation, etc.

• **The Number of International Association Meetings**

The importance given to these meetings in Algeria is very low (an average of only one meeting per year), which explains its ranking in 117th place and 3rd in the Maghreb behind Morocco in the 57th place (with 40 meetings) and Tunisia in the 73rd place (with 17 meetings).

• **The Digital Demand for Cultural and Entertainment Tourism**

The ranking of Algeria (92nd in the world and 3rd in the Maghreb) reveals the deficit of digital marketing in terms of cultural heritage (which is well ranked 35th place for sites and 25th for intangible heritage) compared to Morocco in the 39th place and Tunisia in the 87th place.



Source: 2017 TTCR data

Figure 4: The Variables of the Cultural Resources of Algeria, Morocco and Tunisia in 2017

The inclusion of these variables by the TTC index has prompted the authorities to include and classify heritage on the UNESCO list and in a tourism competitiveness framework, and therefore preserving, protecting and safeguarding these sites in a sustainable development framework. We may cite the case of

Morocco which moved from 9 cultural sites registered in 2013 to 22 sites in 2017; this reveals a competitive and efficient approach, for both heritage and tourism consideration.

IV.5. Tourism Competitiveness Assessment: Business Environment scale

The analysis of the data related to all the pillars

of this indicator, and summarized in the table below, will allow us to deduce several readings:

In terms of evaluation, the values of all the scores related to the pillars namely: the business environment, safety and security, health and hygiene and ICT infrastructure, have progressed for the cases of

Algeria and Morocco. This explains the inclusion of sub-indicators related to these pillars, and their improvements in their tourism development processes. Unlike Tunisia, which did not consider two pillars, namely: safety and security, and the business environment in its tourism development strategy, it scored lower than in it was in 2007.

Table 3-Pillars Of The Business Environment Indicator: Scores A and Ranks of the Three Countries In 2007 And 2017

	Algeria				Tunisia				Morocco			
	Rank 2007	Score 2007	Rank 2017	Score 2017	Rank 2007	Score 2007	Rank 2017	Score 2017	Rank 2007	Score 2007	Rank 2017	Score 2017
Business Environment	82	3.66	110	4	16	5.47	66	4.4	64	3.97	49	4.7
Safety and Security	74	4.18	81	5.3	14	5.47	102	4.7	43	4.88	20	6.1
Health and Hygiene	53	4.91	89	4.9	52	5.02	75	5.2	81	4.11	99	4.6
Human Resources	86	4.82	112	4	22	5.54	113	4	72	5.04	117	3.9
ICT Readiness	118	1.63	96	3.7	69	2.46	73	4.3	92	2.02	77	4.3

Source : data of TTCR 2007and 2017

However, in terms of ranking, the improvement in scores does not represent an increase, nor does justify a downgrading as all the pillars are assessed in relation to the competitiveness and attractiveness of tourism between the countries.

Indeed, Morocco scored more leaderboard progress for the same pillars that achieved better scores. In terms of safety and security, it resulted a decline of 23 places in the world rankings, and 15 places for the business environment. This shows its crucial importance in terms of tourist attractiveness, particularly at the Maghreb level, by occupying the first compared to the international and Maghrebian offer, make it difficult to rely on this indicator to attract tourists.

With comparison to Tunisia, it recorded a significant decline, with less than 88 places for safety and security and less than 91 places in human resources because of the effects induced by the Arab Spring in 2012. It is therefore a question of weak scores in the business environment for Tunisia. However, the regressions in international scores and rankings did not affect its attractiveness ahead of Morocco and Algeria. It remains the best Maghreb country endowed with health and hygiene infrastructure and ICT infrastructure, presenting for this purpose the strengths of its tourism strategy for the indicator in question.

In terms of human resources, the three countries scored low, and were even declined globally. However, Algeria ranked first in the Maghreb thanks to primary

place among the three countries. These two pillars represent the strengths of Morocco's business environment indicator strategy.

Nevertheless, Algeria did not experience the same fate as Morocco. Despite the efforts made to achieve higher scores, it has not improved its international and Maghreb ranking. Its ranking at the 3rd position in terms of business environment, health and hygiene and ICT infrastructure, proves the poor state of its sanitary system, its inability to provide an adequate business environment for investors and tourists, and the deplorable quality of its ICT services and secondary school enrolment rates, and also due to the availability of qualified employees.

IV.6. Assessment of the Travel and Tourism Regulatory Framework

On the evaluation plan, we perceive the improvement in the price competitiveness score for the three countries. With a score of 6 out of 7 (6/7) in 2017, Algeria is considered as one of the best vacation plans in the world. In terms of prioritization for travel and tourism, an increase in Algeria's score was remarkable, which explains the inclusion of sub-indicators related to this pillar. Hence, this score is still lower than the values granted to Tunisia and Morocco despite their regressions.

A sharp decline in the score was also recorded for the three countries in terms of international openness and environmental sustainability.

Table 4- Pillars of the Regulatory Framework Indicator: Algeria, Morocco and Tunisia Score and Rank In 2007 And 2017

	Algeria				Tunisia				Morocco			
	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017
Priorisation pour le voyage et le tourisme Prioritization of Travel & Tourism	109	2.8	131	2.8	1	5.6	48	4.8	15	5.2	35	5
International Openness	113	3.37	134	1.5	42	4.98	76	3	48	4.9	91	2.7
Price Competitiveness	9	5.52	4	6.03	23	5.2	9	5.9	46	4.8	47	5.1
Environmental Sustainability	114	4.01	106	3.7	50	5.2	89	3.9	45	5.2	107	3.7

Source: data of TTCR 2017

In terms of ranking, as its score indicates, Algeria is the 1st in the Maghreb and the 4th in the world in terms of price competitiveness. Unfortunately, this improvement in ranking does not indicate a sign of strength, but on the contrary since it is linked to the falling of the dinar (Algerian local currency) which improved the purchasing power parity and the currency exchange rate, and also the fall in prices of fuel and airport taxes.

Indeed, accommodation prices in Algeria are very expensive compared to those of Tunisia and Morocco, it is ranked the 66th worldwide and the 3rd after Tunisia (9th worldwide) and Morocco (37th). This explains, moreover, the importance of Algerian tourist flows (2 million tourists in 2017) to Tunisia.

Regarding the pillar of prioritization for travel and tourism, a considerable decline in rankings was recorded for all the three countries. We noticed that:

- 22 places lost for Algeria internationally and 3rd in Maghreb countries despite the improvement in its score;
- 20 places lost for the case of Morocco;
- 47 places lost for Tunisia which was the 1st in the world in 2007, and which gave up its 1st place in place in Morocco), and for environmental pollution reasons (121st against the 54th of Tunisia and the 61st place of Morocco).

IV.7. Assessment of Tourist Infrastructure quality:

In terms of improving the scores of the pillars, an increase in the score of the tourist infrastructure of the three countries was noticed, which reveals the

the Maghreb for Morocco.

Regarding the pillar of international openness, the regression in the score led to a decline in rankings for the three countries. We recorded (- 43 places) for Tunisia which is 1st in the Maghreb and the 76th in the world followed by Morocco with (- 34 places), and then Algeria ranked the 113th internationally. Therefore, Algeria is considered a very difficult destination because of the inclusion of security measures in Visa ISA procedures (ranked 132nd against 37th place for Tunisia and 56th place for Morocco), and also, following the low number of its regional trade agreements (119th against 71st and 75th places for Tunisia and Morocco), and of its bilateral air services agreements (117th against 68th and 7th successively for Morocco, Tunisia)

Despite all the efforts made in terms of environmental sustainability, Algeria has improved its world ranking (it moved from the 114th place to the 106th before Morocco in the 107th place and Tunisia in the 89th place). This is mainly due to its non-application of for environmental regulations (130th), the absence of adequate measures to ensure sustainability in the tourism sector (121st against 72nd importance of the efforts made for its enrichment.

Over a ten-year interval, a sharp decline in the score for land and port transport infrastructure is mainly recorded for the three Maghreb countries. This regression also affected air infrastructure in Tunisia and Algeria, while Morocco doubled its efforts to improve its score.

Table 5- Pillars of the tourism infrastructure quality indicator: scores and Ranks for Algeria, Morocco and Tunisia in 2008 and 2017

	ALGERIA				TUNISIA				MOROCCO			
	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017	Rank 2007	Score 2007	Rank 2017
AIR TRANSPORT INFRASTRUCTURE	101	2.25	100	2.1	78	2.74	85	2.3	83	2.66	63	2.8
GROUND AND PORT INFRASTRUCTURE	78	3	105	2.5	27	4.78	95	2.7	54	3.78	60	3.4
TOURIST SERVICE INFRASTRUCTURE	114	1.69	131	2.1	45	3.70	69	4.1	62	3.11	80	3.8

Source: data of TTCR 2017

From the above results, we noticed the following:

Algeria is still ranked last in the Maghreb in terms of the three pillars in question, while Morocco occupies the 1st place in air infrastructure by improving its international rank with 20 places, and keeps its 1st place in land and port transport infrastructure despite having experienced a decline in international rankings (-6 seats). Tunisia's significant decline (68 places) in land and port transport was not beneficial for Algeria, which occupied the last places in the world (105th).

For Tunisia, however, it has kept its 1st place in the Maghreb in terms of infrastructure and tourist services, even with its international decline in place (from 45th worldwide to 69th or -18 places). However, these data remain insignificant compared to the political efforts made to improve the tourism sector.

According to the variables evaluated, the poor ranking of Algerian air transport (ranked 100th) essentially comes down to the weakness of air infrastructure ranked 115th and which does not compete with Tunisia (96th) and Morocco (55th).

As for the Algerian land and port transport (ranked 95th), it is undervalued in relation to the quality of the ports (103rd), the density of the roads (lengths of the roads on the overall surface of the country 121st) and the rate of the asphalt road (98th).

However, the values given to these last two sub-indicators do not represent reality and they are unequal, because the Algerian Sahara represents 84% of the global surface. This is what justifies the poor ranking of Morocco (104th with 53% Sahara) and Tunisia (11th with an area of 55% Sahara).

Regarding tourist infrastructure and services, the ranking of Algeria in the 131st place out of 136 countries reflects the shortcomings of all its variables which are:

- The accommodation infrastructure deficit (ranked the 111th behind Morocco (81st) and Tunisia

(30th).

- The infrastructures shortcomings (rank 132 behind Morocco (47th), and Tunisia (80th). This sub-indicator is measured according to the overall number of classified accommodation and international hotel chains.

We also noted the lack of ATMs (Algeria is ranked 119th behind Tunisia 97th and Morocco 92); and the lack of tourist car rental companies, ranked 113th behind Tunisia 72nd and Morocco 51st.

V. CONCLUSION

The database and the methodological framework of the Travel and Tourism Competitiveness index reports allowed us to determine the importance of each indicator in the arbitration of the attractiveness and competitiveness of tourism in Algeria with regards to the Maghreb context, and to set opportunities and threats of the surrounding tourist (Moroccan and Tunisian market).

In this Maghreb's socio-economic and environmental context, natural and cultural heritage resources represent the primary determinant of Algeria's competitiveness and tourist attractiveness. However, the establishment of a monitoring committee for evaluation variables seems imperative for each of the communication and the enhancement of its heritage.

Indeed, taking into account these secondary indicators, namely natural and human resources, safety and security, and price competitiveness will allow Algeria to set new prospects for tourism in the Maghreb.

It is clear that when looking for a unique cultural experience in Algeria, in a natural or urban, secure, and healthy environment, the tourist also requires a transport infrastructure (air and land), an infrastructure equipped with ICTs, mobility facilities, and a favorable and sustainable business environment;

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