Local Community

Italian scale

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Co-Evolve4BG

Analysis of Threats and Enabling Factors for Sustainable Tourism at Pilot Scale

Local community

Tunisian scale

INSTM

ANPE

Union for the Mediterranean
Union pour la Méditerranée
الاتحاد من أجل المتوسط

CPMR
CRPM

OVERVIEW

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AFT	Tourist Land Agency
APAL	Coastal Protection and Planning Agency
BG	Blue Growth
CAL	Local Authorities Code
FDI	Foreign Direct Investment
FTH	Tunisian Hotel Federation
GDP	Gross Domestic Product
GDS	Global Distribution System
GNP	Gross national product
ICZM	Integrated Coastal Zone Management
INSTM	National Institute of Science and Technology of the Sea
MIT	Ministry of Tourism
MSP	Maritime Space Planning
NGO	Non-Governmental Organization
OECD	Organisation for Economic Co-operation and Development
ONAT	National Office of Tunisian Crafts
ONTT	Tunisian National Tourist Office
PP	Stakeholders
PPP	Private public partnership
UE	European Union
UfM	Union for the Mediterranean
UNCTAD	United Nations Conference on Trade and Development
UNWTO	World Tourism Organization
USD	American dollar

Regione Autonoma Della Sardegna	Autonomous region of Sardinia
SHTT	Tunisian Hotel Tourism Company
T&EF	Threats & Enabling Factors
TD	Tunisian Dinar
TO	Tour operators
VAT	Value Added Tax
WP3	Work Package 3

Abstract

This deliverable provides an overview of the interaction between community and local (regional) tourism. It highlights the role of tourism in local development, at the level of a municipality or a region (cultural, economic, and social development). This report explores the positive and negative effects of tourism on the local community. At a later stage, it illustrates how the community itself participates in the tourism system as a whole system of businesses that directly provide goods or services to facilitate tourism-related professions and leisure activities.

I. Overview of tourism in Tunisia

With 7% of the Tunisian national GDP, tourism is one of the most important sectors of the economy of Tunisia. It represents an important source of foreign currency entry for the country. Thus, tourist activity has a knock-on effect in the sectors of transport, communication, crafts, commerce, and construction.

The geographical position of Tunisia in the South of the Mediterranean basin with 1300km of coastline, a temperate Mediterranean climate, a very rich cultural heritage, and a low cost of tourist stay make Tunisia one of the main destinations for European tourists in Africa and the Arab world (fourth most visited country after Egypt, South Africa and Morocco).

In 2019, Tunisia welcomed more than 9 million visitors. However, this figure could have been higher if the economic situation was favorable to tourism development. In fact, the socio-economic and political impacts that occurred after the Tunisian revolution of 2011 and the consequences of multiple extreme events that occurred over the past 10 years (strikes and social demands, involving the Bardo museum attack in Tunis, the Sousse attack and the Ben Guerdane attack led to a significant slowdown in the tourist activity of the country).

I.1. Tourism: a system of actors, places, and practices

Tourism is a system that necessarily involves actors for all aspects, including supply and demand (MIT, 2003). Modern geography is becoming more social and is the subject of research within what is called the “actor paradigm” or “theories of action”. Often, this approach is combined with the idea of the existence of a “system of actors”, a set of individual or collective actors whose actions operate in an interdependent manner, conflicting or not. Putting the actor at the center of the analysis - whether it is tourists, entrepreneurs, or administrators - is essential to understand the logic of the functioning of tourism as a system: in fact, the latter does not only include markets or spaces.

Here it starts from a posture which supposes that the evolution of tourist spaces implies an evolution of the tourist system, in connection with the integration of new actors and the empowerment of others. This systemic approach, which was inspired by the work of Crozier and Friedberg (1977), two specialists in the sociology of organization, was developed by geographers for territorial analyses (Moine, 2006). Thus, it was mobilized for the study of the construction and the dynamics of tourist areas by Daniel Clary (1993). The latter understood tourism as a global system integrating different spaces and several functions. This approach was further developed by the MIT team, under the leadership of Duhamel *et al.* (2002).

In their most recent approach, the MIT Team (2011)and Duhamel (2018) emphasize the links between actors, practices, and places; given that tourism has not ceased to transform, under the effect of globalization, the renewal of practices and the development of tourism in new places. Thus, recent research in tourism offers a fruitful look at the processes at work through the analysis of these interactions.

According to Violier (2016), "The tourist system also evolves in interrelation with values which emerge in its environment, and which question it. This is the case with sustainable development which appeared in the early 1970s, which inspires a renewal of practices and strategies". Thus, the globalization of tourism, marked by the growing involvement of private and local players in tourism development and by increased competition between destinations, contributes to an invention of tourism spaces and practices.

Tourists, during their trip, implement a project based on practices, and for this they choose one or more places or shelter between different destinations. To carry out this trip, they mobilize upstream services and knowledge, then a means of transport and on-site accommodation as a whole series of services. Very quickly, operators were able to grasp the economic challenges of tourist mobility. Whatever space or time, this logic works. In this regard, private and local actors have taken care to create places and services adapted to the new travelers that are tourists. Similarly, public power has never been disinterested in tourism.

Depending on the intentions of tourists, several functions can be distinguished, which are organized according to three types of space: that of the residence, transport, and tourist practice. Within the residence area, tour operators develop tourist products by assembling services defined in the tourist area before its distribution as a package. They act as intermediaries between the tourist and the tourist service producer. They then acquire bargaining power with other producers of tourist services, which allow prices to drop, while the transport companies route the tourists to their destination. Within the tourist area, the receiving agencies welcome tourists to places of tourist practice. Hoteliers, restaurateurs, transporters, and leisure providers provide the services that tourists need during their trip. With the evolution of the use of the internet, tourists can interact directly with local stakeholders in the tourist destination to book a guesthouse or a rural lodge. The Airbnb trend is erasing the intermediation of classic travel agencies between hosts and tourists. Tourists can interact directly with local stakeholders in the tourist destination to book a guesthouse or a rural lodge.

I.2.Actors of the tourism system

The tourism action system integrates several actors:

Tourists

Tourists are the main players in the system. They are at the origin of tourist places of the 18th and the beginning of the 19th century. Even today, this primacy of the tourist is verified in the choice of places and practices that are deployed there. Because if the places put into tourism by entrepreneurial approaches or by the States have multiplied in the 20th century, giving the impression that the initiative escapes the tourist, it is more a question of the dissemination of already proven models, which implement techniques attempting to interpret the intentions of tourists. The latter therefore constitute the heart of the system. As a result, professionals try to interpret the intentions of tourists; it is always based on the analysis of existing practices, the emergence of new ones as well as the decline of older ones.

Residents (the natives)

In their journey, tourists meet locals. The latter get caught up in the game because these tourists offer economic opportunities. The inhabitants thus integrate themselves into the tourist system by offering their services to restore, accommodate or entertain tourists. Homestay accommodation and rental formulas for furnished apartments, apartments or villas appeared in tourist places at their beginnings only because of the absence of other solutions outside the cities. In Greece, the homestay offer (bed and breakfast, guest house and rural lodging) officially represents more than 420,000 beds in the mid-2000s.

Travel producers and tour operators

Tour operators (TOs) play an intermediary role between tourists, on the one hand, and actors and tourist sites, on the other. Lanquar, (1979) defined tour operators (TOs) as follows: “They prepare, before the request is made, trips, and stays by organizing transport, reserving different means of accommodation and by offering all other services at the tourist destination (excursions). They offer a series of services or travel packages intended to be sold either directly by their own offices or through retail travel agencies, to groups or individuals, at a fixed price, departure dates and return being fixed in advance”.

Among these package manufacturers (TOs), a distinction must be made between generalists and specialists. The generalists offer customers a full range of possibilities: tours of all modes of transport combined, with the objective of any destination in the world (FRAM, TUI, and Marmara). TO specialists focus their trips on a destination, an environment (*e.g.,*Celtics Tours only takes customers to Ireland or Scotland), a lifestyle, or a type of leisure (*e.g.,*Atalante: specialist in hiking and discovery).

The existence of very powerful groups in the emitting countries was noted. The current trend seems to be towards strengthening wholesale travel agencies. Indeed, when it observes the companies of many other countries, it is astonished at the real gigantism reached by certain tour operators: in Germany, TUI (TouristikUnion International)is the first world TO which has bought the British TOs First Choice and Thomson and the Belgian Jet AIR. The large international TOs also have hotels, even a network of agencies and sometimes charter companies. Over the past two decades, it has seen the rise of online TOs, such as www.booking.com.

Travel agencies

They ensure the distribution of products of TOs, presented in brochures generally published for each of the two seasons (winter and summer). They also sell tickets through GDS, the Global Distribution Systemcomputerized systems that provide access to the reservation systems of the various carriers. They also develop tailor-made trips, generally for companies or groups. In addition, counters to sell the package can be set up in large distribution companies (Carrefour).

In countries that initially receive tourists such as Tunisia, the agencies play a receptive role which consists in providing services, such as circuits and visits, directly or by subcontracting. They act as relays for the TOs on site. For example, “Tunisie voyages” is the reception of the Tours Operator TUI.

The carriers

The transport function is carried out by many players specializing in various modes (sea, rails,and air), sometimes used in a complementary manner. When the tourists do not use their own vehicle, or when a load break forces them to do so, they have recourse to various means, such as airlines or railways. Some are limited to fulfilling a transport function while others, cruise lines, offer a complete tourism product on this basis.

Hostel

From traditional and historical forms of accommodation for travelers (inns and post offices), the modes used by tourists have continued to diversify:

- **HOTELS:** The hotels differ according to their operations and their situations; urban hotels in the city and seaside hotels by the sea. They are organized according to different modes. Independent hotels are independent businesses. Sometimes, the independents have come together in voluntary chains to try to mitigate this handicap and offer a quality service, especially in reservations, despite their heterogeneity. The integrated chains are large hotel companies grouping together under the same brand, a set of high-capacity hotels with standardized comfort. Their strength lies in the homogeneity of the product, which reassures customers and enables them to develop centralized reservations. The franchise chains bring together hotels under the banner of a Franchiser who is responsible for their promotion and marketing (for example Sol Mélia El Mouradi). The franchise (El Mouradi) constitutes an independent company which finances the construction of the establishment according to the specifications of the supplier to whom it pays a royalty. In exchange, it benefits from the services of the franchisor (Sol Mélia: Spanish brand); central reservation and brand advertising. In Tunisia, the sector is concentrated in the hands of national private groups forging partnerships with international hotel groups: the French Sofitel-Accor with the TTS group, the Spanish Sol-Melia-Tryp with the El Mouradi group and the American Sheraton with the Affès group. Since 2019, several new tourist entitieshave emerged. As an indication, it was Anantara Tozeur, Club Med Djerba, Kuriates Palace Monastir andthe Mövenpickand Novotel hotels in Sfax,in addition to the other brands which are under construction such as the Marriott. Or even tourist institutions which see their presence reinforced like the Residence which is about to move to Djerba (site chosen as a pilot study site for the third phase of this Co-Evolve 4BG Project).

- **HOTEL-CLUBS:**Hotel-clubs are hotels fitted out for tourist stays where the services are particularly marketed. They appeared in the late 1930s in England. The main innovation provided by this formula consists in the integration of leisure activities into the accommodation function. Sports or leisure activities are fully included in the package. As a result, theseunits were most often called “active” products as they offer a standard regime; either half-board or “all inclusive” (All included).
- **CAMPING:** After its beginnings as a form of tourist accommodation practiced by sporting elite at the start of the 20th century, camping became a form of accommodation either cheap or sought after for the autonomy it provided. In Tunisia, camping remains largely an unstructured sector.
- **TOURISM RESIDENCE:**It is part of the dual affiliation of the hotel, since comparable services are provided there, and of the holiday village since leisure activities are also offered there. The formula is original in terms of its equipment, each apartment and studio being equipped with a kitchen area which gives the tourist more autonomy.

Public actors

In France as in Tunisia, the State intervened very early in the tourist activity; the construction of hotels, the construction of infrastructure, the establishment of institutions such as the national tourist office, whose role is to promote the tourism sector. Today, the importance of financial risks leads public actors to carry out complex financial arrangements, to carry out projects, associating public and private capital. Moreover, in France, strategic organizations such as the National Tourism Observatory created in 1991 plays an important role in the development of tourism policies.

In the Maghreb, the development of the tourist phenomenon began with the colonial economic policy. After independence, the Maghreb States saw tourism as a driving factor of the economy to a greater or lesser degree of intensity. In addition, in Algeria, tourism is not a priority, when it does not have problems of external payments. The mentality of the population, shocked by the colonial war, and the political power were against the development of tourism; “We don’t want to prostitute our sun,” said ex-president Bou Medien. However, the other two countries (Morocco and Tunisia), and in the absence of natural resources to balance payments, opted for incentive and planning policies to establish tourism as a priority sector.

In Tunisia, there are mainly two organizations that are responsible for the development of tourism, which are under the supervision of the Ministry of Tourism and Handicrafts:

- The Tunisian National Tourist Office (ONTT), created in 1971, is a main actor in the tourism sector in Tunisia. Its essential mission is to implement the State's tourism strategy, to develop, regulate and control the tourist activity, to provide hotel and tourist training and to promote and market the "Tunisia" product, both nationally and abroad.
- The Tourist Land Agency (AFT) is a public company with legal personality and financial autonomy. It was created by virtue of article 1 of law n ° 73-21 of April 14, 1973, relating to the development of tourist areas. The Tourist Land Agency operates within existing tourist sites and areas created for the development of tourist zones. Within these areas and sites, the Agency proceeds in accordance with the laws and regulations in force, particularly to:
  - All real estate acquisition transactions for buildings necessary for the performance of its mission.
  - The exercise of the priority right to purchase land located within the land, intervention perimeters and land reserve perimeters.
  - The realization of studies relating to the creation, delimitation, development and equipment of tourist areas and sites.
  - The development and implementation of detailed development plans and the implementation of development, equipment, rehabilitation, and renovation programs in accordance with the provisions of the town planning and regional development code.
  - The development, installation of infrastructures and the realization of subdivisions for hotels and for second homes provided in the detailed development plans of tourist areas.
  - The sale of land and buildings of which it becomes the owner.

In Tunisia, the new constitution of 2014, of the second republic, and the code of local authorities of April 2018 aim to decentralize public action to further involve local and regional actors in the development of their territories.

Local actors

All service providers can become actors of tourism in a destination: small taxis, tourist guides, restaurateurs,and souvenir sellers. It is then a whole local tourism system that works for tourism development. Here also are involved all the operators who develop tourism projects, including associations that offer ecotourism products and destinations, that provide hospitality services, local guides,and local products.

At the local level, organizations that coordinate actions for tourist development can be found, including the tourist offices which have the role of grouping together, in the same region or the same district, all the driving forces of tourism;thatis all individuals or organized bodies that work and can work to grow the tourism industry.

Finally, the actors of tourism are divided between two different relationships to the place. Some, elected officials and technicians of public organizations, the artisans, seek to develop and put in order the territory they develop. The others, tour operators and other entrepreneurs, favor the circulation of tourists in many places, if it is within their networks. But as the tourist does as he/she pleases, he/she chooses sometimes to curl up in the shell of the hotel-club, sometimes to circulate as he/she pleases. However, the relations between the actors to a given tourist place are complicated and evolving.

I.3.Types of tourism and their roles in territorial development

I.3.1.Health tourism

Beach tourism is the number one form of tourism in the world. The coasts concentrate most of the tourist accommodation: 90% in Portugal and 80% in Tunisia. The charm of the sites, the climate and the quality of the accommodation were the initial elements of elitist seaside tourism, for the benefit of resorts and areas such as Nice, Cannes and Djerba, across the Mediterranean.

On a Tunisian scale, this tourism sub-sector contributes to highlighting certain regions, mainly those of the eastern coast, particularly the Gulf of Hammamet, Sahel and Djerba. Thus, these coastal regions accumulate more than 95% of the beds.

I.3.2. Recreational ports and de marinas

The popularity of boating has led coastal resorts to set up marinas. In the large traditional ports, where merchant traffic has abandoned old sites for modern facilities, the old basins have become marinas, as in Marseille and Bizerte (Cap 3000). The interests involved are considerable. Thus, the great pleasure brings the currency and attracts foreign capital for the realization of these ports.

The Tunisian coast has a tourism development potential of marinas of around 200 million dinars revenue per year. Thus, the shortage of places on the European side of the Mediterranean and its proximity to it, have been profitable to the realization of these benefits for Tunisia.

In 2020, 8 marinas and marinas totalling 1,500 berths were in service while several projects are underway or under study:

- Tabarka.
- Bizerte.
- Gammarth.
- HoumetSouk.
- Sidi Bou Said.
- Yasmine Hammamet.
- El Kantaoui; and
- Monastir.

I.3.3. Saharan tourism

The choice to encourage Saharan tourism in Tunisia was initiated to diversify national tourism by making fruitful a little exploited cultural and natural heritageand to allow the Saharan regions developing a new local economic solution while preserving their cultural and natural heritage. Thus, today there are four Saharan tourist regions in Tunisia:

- The region of Gafsa and Jerid, with the oases of Tozeur, Nefta and mountain oases (Chebika, Midès and Tamerza), which is the best region equipped with hotel infrastructure and is home to the largest oases in Tunisia.
- The region of Nefza with the two oases Kebili and Douz (south-east of Chott el-Jerid), Douz constituting the starting point of many camel rides to the great south.
- The region of the cave dwellings of Matmata and the Berber villages that surround it like Blessed Zelten, Tamezret, Zraoua and further North Toujane, on the road to Medenine.
- The region of Tataouine and the 65 ksour surrounding it, Tataouine being a starting point to discover the desert of Sahara.

These Saharan tourist regions have not been able to develop specific tourist images and become independent tourist destinations. They remain largely dependent on the Djerba area. They function as sites of passage and organization of circuits from this seaside area. So, the number of tourist beds remains limited.

I.3.4. Medical tourism

Medical tourism boomed in the 19th century in many European countries. Over the past twenty years, spa resorts have evolved a lot in the world with the appearance of new formulas, such as rejuvenation cures in Romania or anti-smoking or anti-stress stays. Thalassotherapy is a product of well-being which benefits many coasts (water and algae). Tunisia took advantageousfor this niche (health tourism) to attract an additional European clientele to perform cosmetic and dental surgeries for reduced prices.

Tunisia attracts a significant number of patients from neighboring countries. The number of foreign patients in private Tunisian clinics increased from around 50,000 in 2004 to over 150000 in 2007 with nearly 70% of them coming from the Maghreb (particularly Algeria and Libya) and around 12% in consideration of European countries. Algerians and Libyans come for treatment here because their countries do not have adequate and efficient medical infrastructure. Cosmetic and dental surgery represents one of the disciplines most requested by the clientele of this medical tourism.

The receipts of this sub-sector reached 55 million dinars in 2006, with an annual increase ranging between 10 and 20% on average since 2005. The attractiveness of this type of tourism is accentuated by the tariffs between 40 and 70% lower (rates exempt from VAT of around 6%) than those charged in Europe. Having the reputation of a country of medical skills, Tunisia has the chance to further develop its offer, in terms of medical tourism.

I.3.5. Congress tourism (business tourism)

Urban, business, and cultural tourism involves large numbers of workers and provides considerable income to certain cities. These forms of tourism can be grouped together because they offer many common points, both in terms of attendance and the resulting spatial effects. They are marked by the brevity of the stays on each site. It is also spatially concentrated tourism. Accommodation is marked by the strong preponderance of hotels and side-hotels, to which are sometimes added homestay accommodation, youth hostels and campsites. The ancillary facilities are diverse: conference rooms, cafes, restaurants, souvenir shops, cabarets and night clubs constitute the major part. In some cities, the turnover linked to tourism is significant.

Congress tourism (business tourism) has not stopped growing since the 2000s. It is not a negligible tourism for both national and international visitorswho constitute a large part and regular clientele for manyhotels and tourist units. They particularly mark the low season (September to March) which perfectly and regularly complements the annual economic exercise for several hotels (particularly4- and 5-star hotels). Since 2010, the Tunisian authorities in charge of tourism (ministry and tourism office) have not stopped promoting congress tourism, particularly following the crisis experienced by the tourism sector since the Tunisian revolution and the decline in conventional foreign tourists and seaside tourism.

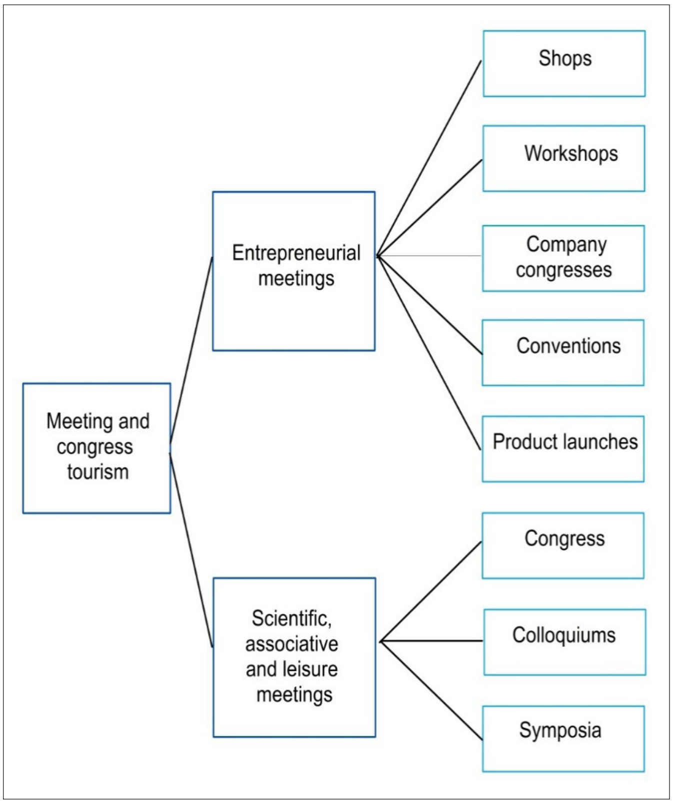

Figure 1. Compositionof congress and business tourism

I.3.6. Ecotourism and rural tourism

Rural tourism is tourism which has evolved a lot in France and Scandinavia. On the other hand, it only begins to develop in Tunisia. This “green tourism”, which takes advantage of the ecological wave, is also based on the diversification of activities: hunting, fishing, horseback riding, discovery tours and river tourism.

In rural areas, tourism does not pose the same problems as on the coasts and in high mountains, because it is diffuse and only constitutes a supplementary activity. The facilities are often ad hoc and limited: lakes, tennis courts, children’s play areas and equestrian centers. The fact remains that the economic and social challenges of agro-tourism remain important. Farmers derive additional income from the rental of lodges and the direct sale of their products (MIT, 2003)

In Tunisia, this type of tourism has been booming since the 2000s, especially in regions with high ecological and natural potential, particularly in the Northwest of Tunisia (Ain Drahim, Tabarka, Siliana, Béjaand Kef), Zaghouan and around some localities in Cap Bon.

I.4. The role of tourism in territorial (local) development

The weight of tourism is growing steadily in national economies (developed or not) both in terms of jobs, growth, and contribution to the trade balance. This sector is one of the first foreign exchange resources for emerging and/or developing countries. In 2008, the UNWTO estimated international tourism receipts at 950 billion dollars, or about 5% of world GDP. For some emerging countries that are heavily touristic and not very industrialized, these revenues can represent up to 40% of GDP. In terms of jobs, tourism represents between 6 and 7% of world employment and 10% of foreign direct investment (FDI). These figures, given the difficulty of grasping the tourist phenomenon, must be put into perspective, and considered as orders of magnitude.

One of the paradoxes of this sector is that it perhaps weighs as much in indirect as in direct terms (Vlès, 2011), at least in the current state of the data and statistical methods making it possible to define this sector. Tourism is now seen as a growth vector by many developing and emerging countries. The examples of Morocco with its “vision 2010” policy, or even of Spain with the excessive urbanization of its coasts (Larrosa Rocamora, 2003), however, testify about the fragility of such a will, more oriented on flows and real estate projects than on a lasting territorial dynamic structured by tourism, at least in the current state of data and statistical methods allowing circumscribing this sector. Tourism is now considered a growth vector by many developing and emerging countries.

To develop through tourism, a territory must be able to benefit from the effects of this activity, while limiting leakage. The expenditure incurred by tourists represents an injection of income that generates three types of effects on the host economy (Vlès, 2001). The direct effects are the most visible and easy to understand from a quantitative point of view since they concern all the characteristic expenditure of tourism, within the meaning of the accounting rules established by the UNWTO (2009) and the OECD (2001). The indirect effects concern the intermediate consumption of direct tourism players from their suppliers and service providers. The impact will be more important for the host territory as the value chain will be managed locally with local players. As a result, several indirect impact studies lead to the notion of a multiplier that affects sales, income, employment, investments, infrastructure and tax revenue (Vlès, 2001; Frechtling and Horvath, 1999). The induced effects relate to the expenditure made possible by the salaries of people working in companies linked directly or indirectly to the tourist activity, and by the expenditure of companies which benefited from the initial expenditure of the tourism sector. But this is without considering the "leaks" caused by tourism (Nowak and Sahli, 2010).Because if the inputs are mainly imported, if the investors in the tourist structures dedicated are foreigners and repatriate their earnings, if the marketing of the destination is entrusted to actors from the emitting countries, part of the tourism revenues will be directed abroad, which will generate leaks for the local economy. To remedy this, the United Nations Conference on Trade and Development has been advocating for several years "the strengthening of intersectoral links, privileged vectors of wealth creation and poverty reduction" (UNCTAD, 2006 In: Fabry and Zeghni, 2012). However, these intersectoral links are not forged without bringing the players into contact, without encouraging them, and above all without controlling the growth of the tourism sector in the service of a territorial development project.

The new concept "the tourism cluster" is considered as a territorial development option which allows a territory to switch from the status of a space put into tourism to that of a tourist destination. The development of tourism in a territory consists of making it accessible (infrastructure) and managing its carrying capacity (waste, wastewater, preservation and safety of natural and built heritage as well as of cultural heritage). For its part, a destination, beyond tourists, must attract, welcome, and retain businesses, investors, public services, institutions,and labor in order to become a locally integrated tourism system. The tourism cluster is the subject of great enthusiasm in the former communist countries of Europe and, in general, in emerging tourist destinations, so that some are working more to install tourism in the territory than to anchor it socio-economically in the territory. Questioning the relevance of the concept of cluster for a territory therefore seems legitimate (Fabry and Zeghny, 2012).The tourism cluster is a derivative of the industrial and technological cluster concept. The tourism cluster, for its part, is based on a very strong specificity linked to the nature of the tourism sector and that of the tourism product which is an assembly product where the tourist is a co-producer, but not a resident. Finally, a tourism cluster is a concept of the territory, in which governance serving the mobilization of skills and localized resources will appear as one of the key elements for the success of the territorial project (Fabry and Zeghny, 2012).

For the Tunisian case, the tourist cluster concept presents an opportunity to develop a more territorial tourism system, which integrates local and regional actors: artisans, civil society, small businesses that manage rural lodges and guest houses.

Beyond the constitutional principles governing the distribution of powers, the Local Government Code of 2018 (Local Authorities Code, CAL) attributes extremely diversified powers to the local government in all domains of regulation: law and order, economic development, urban planning, and development of the territory, and so on.

Article 132 of the Constitution confers legal personality to local government: this means that it has its own legal existence and autonomy in relation to the State. In addition to managerial autonomy of local government, the principle of autonomous administration is now reinforced in Tunisia. In practical terms, the local government is autonomous in relation to the State at all levels: legal, administrative, and financial. The local government enjoys its own legal capacity and manages local affairs autonomously. It operates its own financial planning and manages its budget autonomously.

Tunisia's decentralization process has the potential to reinvigorate the democratic transition by empowering local actors, improving service delivery, injecting new energy and ideas into the policy process at the local level and alleviating some pressure on the central government. But the process must provide long-term systemic changes to governance and fiscal authority as well as demonstrate short-term wins, particularly in the country's traditionally disadvantaged interior regions. Decentralization's success depends on it.

Tunisian municipalities are also competent in tourism field. In fact,Art. 243 of the organic law of local government stipulates "The powers shared with the central authority consist particularly of the following:

- The development of the local economy and support for employment.
- The preservation and development of the specificity of the local cultural heritage.
- The completion of appropriate actions to promote private investment and the establishment of economic activity zones.
- The creation of collective social, sporting, cultural, environmental and tourist facilities such as cultural centers, museums, stadiums and other sports facilities, swimming pools, parks, landfills, and waste treatment.
- The management and development of the coast located in the territory of the municipality in coordination with the competent services in accordance with the laws and regulations in force.

II. Coastal tourism and local communities

II.1. The Significance of Economic Sectors to Communities in the Context of Tourism Activity

II.1.1. Role of tourism in economic development

In Tunisia, mass seaside tourism dominates the national offer. In 2018, tourism contributed 8% to exports, with 41,412 million Tunisian dinars. It is in 2nd position after the textile-clothing sector which supplied 71,128 million Tunisian dinars. Thus, it participates with 4.9% of all foreign direct investments, *i.e.,* with 134 million TD. To this end, tourism constitutes one of the bases of the Tunisian economy, if it contributes with almost 7% of GDP, in 2018 (ONTT, 2018).

Given the seasonality of tourism activity, tourism revenue changes from month to month. The high season, especially the two summer months of July and August (year 2018), recorded the best receipts, with 511 and 752.4 million DT, respectively. So, February (year 2018) recorded thelowest revenue, with 131 million TD (ONTT, 2018).

The tourism sector participates in covering the trade deficit by 22% in 2018. However, this rate has been constantly declining for several years if it was at the level of 54.2% in 2009 and at the level of 74.7% in 2005. This decline is largely explained by the frequentation crisis, which the tourism sector suffered especially after the Tunisian revolution of January 14th,2011, and the terrorist attacks in Bardo and Sousse in 2015 (ONTT, 2018).

In 2018, tourism participated in direct investments with 216.3 million TD and with a rate of 1.2%. Thus, it participates with nearly 2,748.5 in added value,*i.e.,* with a rate of 3% (ONTT, 2018).

II.1.2. Role of tourism in social development

When the Tunisian state decided to develop the tourism sector at the end of the 1950s, it sought to create outlets for a mainly young population with minimal expenditure in terms of training and investment. Even if today, the exact figures in terms of the number of employees are not available, it is known that the sector employs nearly 20% of Tunisians directly and indirectly. Moreover, in terms of direct employment, the variability ofrecruitments under the effect of the seasonality of this activity is still unknown. Thus, these tourism employees are diversified in terms of training and recruitment methods (with contract or without contract). Moreover, Tunisian hoteliers have been used for a few years not to renew the employment contract beyond 4 years of work, because of the fear the employee's obligation to establish tenure, with reference to Tunisian regulations in employment.

In Tunisia, there are 8 tourism establishments: a single higher institute of hotel and tourism in Sidi Dhrif in Tunis, 3 training centers in Nabeul, Hammamet and Djerba and 5 hotel schools located in Sousse-Nord, Monastir, Djerba, Ain Drahem and Tozeur.

These establishmentswelcomed nearly 500 young people to train them in 2017-2018. Thus, during the summer of 2018, these hotel establishments placed 570 interns (ONTT, 2018).

The tourism sector in Tunisia operated 1,220 agencies in 2018: 946 of License A and 274 of License B. They participated in the tourism dynamic in the different tourist regions through the organization of excursions and tourist circuits for the benefit of international agencies (TO), which subcontracts them, on the Tunisian territory. They function as receptive or local agencies for the TO partners. Thus, it participates in the development of national tourism, by playing the intermediary between hoteliers and internal tourists. The Tunis North region occupies the first place with 476 agencies and the region of Sousse the 2nd place with 172 agencies.

In Tunisia, there are 352 tourist restaurants. Thus, 2-fork type restaurants are in first position with 182 units, followed by 3-fork type restaurants with 133 units.

These tourist restaurants are mainly concentrated in the major tourist regions of the country: in first position Tunis-North with 115 units, Nabeul-Hammamet 74 units and Sousse with 54 units. They participate in the animation of tourist towns and in the development of the local tourist economy, although in Tunisia, gastronomic tourism has not yet been developed. In the Mediterranean basin, the countries of the north shores have been able to develop gastronomic destinations which are distinguished by their culinary cultures. For example, in France, an estimated 50% of tourism spending is in restaurants (Sicart, 2017).

Table 1. The distribution of travel agencies on the Tunisian territory (ONTT, 2018)

Region	License A	License B	Total
North - Tunisia	401	75	476
Nabeul	102	37	139
Sousse	125	47	172
Tozeur	34	1	35
Djerba	67	19	86
Kebili	40		40
Sfax	42	25	67
Bizerte	13	4	17
South - Tunis	29	10	39
Monastir	38	16	54
Gabes	14	7	21
Yasmine-Hammamet	1	1	2
Sbeitla	5	7	12
Tataouine	8	4	12
Mahdia	20	11	31
Kairouan	6	6	12
Tabarka	1	4	5
Total	946	274	1,220

Table 2. Tourist restaurants in Tunisia(ONTT, 2018)

Regions	3 Luxe forks	3 Forks	2 Forks	1 Fork	Total
Tunis-North	3	19	56	37	115
Tunis South			1	2	3
Tabarka			5	5	10
Bizerte			5	2	7
Nabeul-Hammamet		4	47	23	74
Yasmine-Hammamet		1	4	1	6
Sousse		4	26	24	54
Monastir		1	9	6	16
Mahdia			3	2	5
Sfax		3	3	4	10
Djerba			11	13	24
Gabes			3	1	4
Sbeitla			2	3	5
Tozeur			5	7	12
Tataouine			1	1	2
Kebili				2	2
Le Kef			1		1
Kairouan		1	1		2
Total	3	33	183	133	352

II.1.3. Role of tourism in cultural development

In Tunisia, the tourist activity remains mainly seaside and hotel. Few of the tourists come here for cultural reasons. To this end, the places of cultural tourism: monuments, archaeological sites, museums, and medinas represent the major tourist poles, with the framework of excursions or circuits. So, they function as places of passage and not as full destinations.

Moreover, the number of visitors to these heritage places remains very limited compared to the number of international tourists who visit Tunisia. To this end, for the year 2018, the Carthage Museum is in first position with 242,547 tourist visitors, then in second position the Colosseum El Jem with 203,737 tourist visitors and in third position the Bardo museum with 102,112 tourist visitors (ONTT, 2018).

In Tunisia, although the country has 3,000 years of civilization and 33,000 historical sites,cultural destinations independent of seaside towns have not been able to develop. For example, the city of Kairouan is an ultimate cultural destination. Kairouan was featured in several cultural tourist routes, so today it is rather dependent on coastal towns.

Thus in 1951, out of 73,000 tourists who visited Tunisia, 15,000 went to Kairouan which is the equivalent of a third destination. In the year 1975, at the beginning of the development of mass tourism, through the creation of 7 seaside areas, out of nearly a million tourists who visited Tunisia, 264,000 visitors were counted to the monuments of Kairouan. However, in 1990 and at the height of mass seaside tourism, when Tunisia received more than 4 million tourists, the number of tourists visiting the Aghlabid capital dropped to 243,000. Finally, in 2017, when Tunisia welcomed nearly 7 million tourists, Kairouan only received 24,975 visitors, which represents nearly 0.4%. This low percentage shows that Kairouan has lost a lot of its tourist reputation (Tourism commissioner in Kairouan).

Despite its historical, architectural, archaeological, artistic, and urban potentials inherited from different medieval periods, Kairouan has become a city of passage for tourists who frequent it from the seaside tourist areas: Sousse, Monastir, Mahdia and Hammamet, without, however,being able to become an independent tourist "Destination". Being devoid of tourist infrastructure, the city has a very low capacity in tourist beds: 997 beds, in 2017. It recorded, in this same year, 41,274 entries and 59,696 overnight stays, which gives an average of 1.44 overnight stays. This very low average - due to the nature of tourist practices passing through Kairouan, directly influences the operating rate, which does not exceed 16%.

The city of Kairouan, like the entire destination Tunisia, has suffered the full brunt of the consequences of political instability and security incidents following the political events of January 2011. Entries have evolved negatively from 65,516 in 2010 to 37,735 in 2016. At the same time and for the two reference years, overnight stays fell from 91,993 to 54,288. Thus, for the same period, the number of visitors to the city fell from 174,412 to11,054 (ONTT, 2017). As a result, the city of Kairouan has suffered the effects of the tourist crisis in seaside towns in Tunisia (Souissi and Hellal, 2018).

II.2. Handicrafts

The arts and crafts' industry is a very important sub-sector for Tunisia in view of its socio-economic role and its capacity to suck a large part of the artisan workforce.This sector is closely linked to the performance of the country's tourist flow. The sector plays a leading role in the conservation of the tangible and intangible cultural heritage of Tunisia. Indeed, Tunisian craftsmanshiprepresents one of the vectors of the country's growth, particularly thanks to its strong contribution to tourism growth, its contribution of 2.2% of national exports and 4% of GNP, in addition to the guarantee of 7,000 jobs per year.

According to the ONAT, this sector has at the national level,350,000 artisans spread over 76 activities, 1,200 craft companies and 523 exporting companies with a global value of exports of around 385 million dinars (nearly 240 million dollars).

According to ONAT, the overall volume of investments in the craft sector reached 11 million dinars in the first half of 2017, registering a growth of 3% compared to 2016. Thus, 2,000 projects have been launched, creating more than 3,500 jobs during the same period. The sector's exports (various products) reached a value of 544 million dinars in 2016against 441 million dinars in 2015, an increase of 22%. The craft sector has 1,784 active companies, of which 573 are exporters. It offers between 350 and 400 thousand jobs in its various sectors and contributes 4% to the GDP.

Several handicrafts are exported to the United States of America, Canada, and European countries such as Italy, France, Spain, and England. Among other things, Tunisian craftsmanship is distinguished by its strong potential in terms of job creation and its establishment in the inland regions of the country.

Despite the difficulties experienced by handicrafts in Tunisia in 2011, it remains one of the most important job-creating sectors with high added value considering the enormous capacities of the Tunisian regions in terms of diversity and abundance of raw materials. Indeed, this sector still suffers from several shortcomings such as the anarchic importation of foreign and imitated products, the decline in the rate of production and the competitive capacity of Tunisian artisanal enterprises as well as the degradation of the quality of the local product.

It is also the reluctance of young people (particularly among women) on craft activities in addition to the low level of remuneration, *i.e.,* 80 dinars per month.

On the other hand, Tunisian handicrafts is affected by certain difficulties in the supply of raw materials at preferential prices in addition to the involvement of numerous intruders in the distribution networks of handicrafts, which has affected the transparency of transactionsin the tourist market.

However, and despite these many constraints, the sector is characterized by a set of strengths ranging from high employability with low funding to the potential for wisely exploiting local natural resources, in addition to the existence of high-level craft skills.

The current orientation in Tunisia is to strengthen the contribution of the craft sector in regional development, particularly in the inland regions of the country, through an action plan that will try to boost the integration of unemployed young people into the direct employment market. This action plan will start, in all its components, from the inventory of each region of the country and the expectations of its artisans while making use of the export capacities of promising artisan specialties.

This new action plan is also based on "valuing local raw materials, which will give added value to the environmentally friendly artisanal product in high demand on export markets".

Since 2017, craftsmanship has experienced a slight growth; however, the current Covid crisis of 2020 has had catastrophic consequences on this sector, which has brought the sector's performance back to square one before 2017, or even a more worrying situation than that recorded since 2011.Indeed, Tunisian craftsmanship has been facing many difficulties for years because of the problem of the availability of raw materials and their quality, the lack of means for the marketing of the artisanal product and the flagrant lack of qualifiedlabor. It is also strongly affected by the unprecedented crisis that has affected the tourism sector.

An action plan for the development of the craft sector was announced in 2017; the latter is based on the upgrading of craft enterprises, the financing of innovative projects, training and skills development and the facilitation of the marketing of craft products at both the national and international levels. Otherwise, a national plan to promote the sector has been adopted by the Tunisian government. This plan aims to create 30,000 jobs/year over 5 years. However, the current political and socio-economic situation, added to the Covid crisis and its heavy impacts, hinders the implementation of these government initiatives.

II.3. Engaging Communities in Local Tourism Development: Participation Methods and Approaches

The blue economy is an economic model to "boost" local development, embodying land-sea interaction for a sustainable local economy. Indeed, the blue economy is an economic model inspired by natural ecosystems and advocating the principles of sustainable development by promoting what is available locally and by transposing the prowess of nature to an industrial scale. This concept is based among other things on the principles of the circular economy where each waste becomes a source of energy for another activity.

The blue economy fits into the system of natural resource sustainability and job creation. The term refers to the "blue planet", integrating the air, the sky and all the elements of the "green" economy.

Regarding the concepts of local governance and planning, Integrated Coastal Zone Management (ICZM) as well as Maritime Spatial Planning (MSP) are, if implemented, practical tools and solutions guaranteeing the sustainability of resources,natural coastal areas, and sustainable management of the marine environment. Sustainability and sustainable management do not make sense if they do not start at the local level, with full and continuous involvement from the development of strategies and action plans, their implementation, monitoring, and evaluation.

However, these concepts remain weakly proven in the field, if not completely theoretical. Indeed, many concerns and constraints hinder the realization of a real ICZM in Tunisia. The most important of these constraints concern particularly: the policies and regulatory frameworks of countries dealing with the exploitation and management of the coastal zone, the marine environment and its resources, the applicability and adaptability of the approach ICZM to the local context; the involvement of sectorial institutional bodies, governmental and territorial actors (*i.e.,* local authorities, governorates, delegations and municipalities) and NGOs/SCs in the ICZM process and non-governmental organizations.Thus, among the recommendations made during the numerous analyses and evaluations of the ICZM process in Tunisia, and those for a better implementation and strengthening of the ICZM concept on the Tunisian coast, the need for participation and real involvement has often been advocated (often the models of tourism strategy and planning are centralized and parachuted, without real consideration and without consultation with local communities). Thus, it is particularly recommended to:

- Increase the assumption of responsibilities and the participation of local communities, particularlysectorial representative bodies, civil society, and local NGOs.
- The taking of responsibilities and the participation of local NGOs in ICZM initiatives and in the implementation of programs and action plans should be a key objective as well as an instrument to improve the results in terms of sustainable management of coastal zones and for the adoption of the principles of ICZM.
- Local communities must be seen as levers for good sustainable management and governance of environmental issues in coastal areas.This requires a better public-private partnership (PPP) includingthe recognition of the role of communities and local civil societies in local development (niche and territorial economy) in terms of tourism.
- The involvement or not of local communities in sectorial strategies and action plans, particularly those related to local tourism development, influence the quality of governance and the functioning of the partnership management system, which has a direct influence on the sustainable management of the coastal zone at the local level. Otherwise, this involvement must include measures in favor of taking the responsibilities by local communities and civil society which should include awareness-raising, environmental education, monitoring, control, and participation in decision-makingand public information.

Due to the low representation or even the absence of citizen organizations and other non-governmental stakeholders, little and/or not involved in ICZM approaches to varying degrees, the ICZM strategies, action plans and programs have not made it possible to consultations at the local level to discuss key issues relating to the local and national ICZM process (*i.e.,* Where are we? Where do we want to go? How? How are we going to do it?).

Finally, the blue economy, ICZM and MSP seem to be ideal means for more involvement of local communities in decision-making and especially decisions concerning strategic sectors such as tourism, which is a key sector for the local economic development for many regions in Tunisia. This involvement must not only concern the contribution in decision-making but must also extend to the contribution in the strategic orientations as regards to the local economy and local spatial planning.

III. Local community parameters

In the frame of Co-Evolve4BG project, a set of parameters has been developed to provide an overview regarding the positive and negative effects of coastal and maritime tourism to the local community. This set is composed of2 parameters as presented in the following table. Data relevant to these parameters was collected at both national and regional scales.

Table 3. Local communityparameters

Parameters	Description	Source
Effect of illegal immigration on the tourism sector	Indicate if tourism suffers from issues related to illegal immigration (Depart / Arrival) (Possible values: Yes/No)	Vlès, 2001 ;Sicart, 2017
Complaints by local community from tourism	Indicate if there are changes in the local attitude regarding tourists and touristic activities. (Possible values: Yes/No)	Vlès, 2001 ; Sicart, 2017

IV. Conclusions

Since its independence in 1956, the Tunisian state has bet on the development of international tourism. Its unique geographical position in the heart of the Mediterranean and its rich landscapes and heritage make Tunisia a demarcated tourist destination. This sector, of an extroverted nature, remains a priority in the development policies of the State to theoretically participate in foreign currency inflows and the equilibrium of the balance of payments.

Nevertheless, tourism in Tunisia remains particularly mass seaside tourism, dominated by entrepreneurial actors, particularly hoteliers and tour operators, which today turns out to be an offer at odds with the changes in the international tourist demand. Nowadays, "tourist globalization, established on top-of-the-range structures, does not call into question the so-called "mass"tourism, but deprives it of any perspective" (Sicart, 2017).

The product offered by Tunisia is mainly a hotel product, which has no relation to the nature of the territory. It goes without saying that the destination Tunisia has gone through several economic and structural crises which have made it vulnerable compared to other competing destinations. Today, the development choices of the tourism sector are increasingly criticized by its opponents, because of their weaknesses in terms of revenue and territorial traceability such as an almost zero contribution to the State fund, high debt of hotel promoters and the craft crisis in tourist towns.

It seems that the prototype of "inexpensive mass tourism" has "proven itself and its time". It was then demonstrated that the Tunisian tourism crisis is not cyclical, but rather structural. This observation requires a great deal of work on the part of the public authorities to change the image of the destination through the prospects of developing new tourism products, particularly the cultural and rural. Decentralization and new reservation techniques are the means for the Tunisian case, especially to bypass the tour operators who have monopolized for a long time the marketing of the destination Tunisia. Thus, the Tunisian state is forced to proceed with institutional reforms, faced with its failings in terms of prospecting new demands. So, it is time to make the territory a base for development and integrate the territorial players in the tourist action system. The tourist cluster concept presents itself here as a solution to develop tourism throughout the territory.

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