

GOVERNANCE AND ORGANISATIONAL STRUCTURE IN THE SPECIAL TOURISM SECTOR – BUYER-DRIVEN OR PRODUCER-DRIVEN VALUE CHAINS?

The case of trekking tourism in the Moroccan mountains

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With 1 figure and 3 tables

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Summary: In the debate about economic globalisation, governance has become a central element. Especially studies working with a value chain concept emphasise the ability to direct and to control different economic actors at different geographical places in a globally-linked production process as a key competency for market success.

But most of these studies focus on the industrial or agricultural sector. The value chain discussion drew only little attention to the phenomenon of international tourism, although it is one of the most important economic branches worldwide. And in tourism too, we find globally-linked value chains. So the question arises, of how far experiences and findings made within the various value chain studies undertaken so far may help us to gain insight into the governance structures and organisational patterns in the international tourism business.

This article deals with the situation of the Moroccan mountain tourism as one example of internationally linked tourism. Based on the Global Commodity Chain concept by GARY GEREFFI, it describes the different types of organisation and governance in this tourism chain and argues that the Commodity Chain concept represents a useful starting point for the analysis of tourism. However, because of the particularities in tourism, it is not able to explain all the existing forms of business relations. Referring to transaction cost theory it will seek to fill this gap and therefore contribute to a general understanding about how value chains in tourism are organised and governed. Finally, it will explain not only why, but also when different types of governance and organisation do prevail by integrating them into a life cycle model of tourism destinations.

Zusammenfassung: In der Globalisierungsdebatte ist der Begriff der Governance zu einem zentralen Element geworden. Vor allem Studien, die mit einem Value Chain-Konzept arbeiten, betonen die Fähigkeit zur Steuerung und Kontrolle von verschiedenen ökonomischen Akteuren in einem global verbundenen, aber an unterschiedlichen geographischen Orten stattfindenden Produktionsprozess als eine Kernkompetenz für den Markterfolg. Allerdings konzentriert sich die Mehrzahl dieser Arbeiten auf den Industrie- oder den Agrarsektor. Obwohl der internationale Tourismus zu den weltweit wichtigsten Wirtschaftsbranchen gehört, wurde diesem Phänomen in der Value Chain-Diskussion bisher noch recht wenig Aufmerksamkeit geschenkt. Aber auch im Tourismus finden sich global verbundene Wertketten. Es stellt sich also die Frage, inwieweit Erfahrungen und Erkenntnisse aus bisherigen Value Chain-Studien uns zu einer Einsicht über die Governance- und Organisationsstrukturen im internationalen Tourismus verhelfen können.

Der vorliegende Beitrag befasst sich mit dem marokkanischen Gebirgstourismus als einem Beispiel für international vernetzten Tourismus. Ausgehend vom Konzept der Global Commodity Chains von GERRY GEREFFI werden die unterschiedlichen Organisations- und Governancetypen in dieser Tourismus-Wertkette zunächst beschrieben und dann wird argumentiert, dass das Konzept zwar einen guten Ausgangspunkt für die Analyse touristischer Wertketten darstellt, aufgrund der Besonderheiten im Tourismus jedoch nicht alle existierenden Unternehmensbeziehungen erklären kann. Mit Hilfe der Transaktionskostentheorie soll diese Erklärungslücke geschlossen und so zu einem allgemeinen Verständnis über die Organisation und Steuerung touristischer Wertketten beigetragen werden. Schließlich wird nicht nur dargestellt warum, sondern auch wann bestimmte Governance- und Organisationstypen vorherrschen, indem diese in ein Lebenszyklusmodell für touristische Destinationen integriert werden.

Keywords: Global value chains, tourism, institutional economics, Morocco

1 Globalisation and the role of services

Outsourcing, lean production, toyotism, just in time, network production, fragmented work process, flexible production – one could easily extend this list of catchwords that come to mind when talking about economic globalisation. All the terms stated above make it evident that globalisation means more than just the mere quantitative extension of economic transactions. It indicates moreover a fundamental qualitative change in economic relations (see e.g. HEIN 1997; SCHAMP 2000; GEREFFI and MEMEDOVIC 2003). Globalisation therefore refers to the way in which economic transactions are organised and institutionalised. But the terms mentioned above also indicate that so far the discussion about globalisation is focusing mainly on commodity production. A reason for this may be that in this field, globalisation results in massive effects, which lead to a tremendous change in the production and a society system in the industrialised countries. It may also be simply the fact that industry and agriculture are clearly defined economic sectors where it is quite easy to record the monetary value of single production steps.

The importance of services, and in this context of tourism, still seems to be underestimated (see BRITTON 1990; WAHAB and COOPER 2001). But PORTER (1985) already found out that within a production system the services sector often holds the most value intensive activities. Taking the travel industry we find one of the world's most important economic branches consisting almost entirely of services. Especially with regard to the integration of developing countries into the global economic system, tourism plays an important role (see VORLAUFER 2003; DIAZ BENAVIDES 2002). In this context, specialised forms of alternative, nature-based tourism gain growing importance (POPP 2001, 2003). For one thing, an increasingly growing demand can be noticed in this sector throughout the last years. For another, these forms seem ideally to fit into development strategies for peripheral regions, as they promote intact nature and authentic ways of life and therefore do not need cost-intensive infrastructure.

But while there is already a huge body of literature about the effects of alternative forms of tourism (e.g. SCHUMANN 1994; EAST et al. 1998; ERHARD 2000; SINGH and MISHRA 2004) very little is known about the way economic activities in tourism are organised and governed (see also SCHAMP 2007, 154).

This article deals with Moroccan Mountain tourism as one kind of these specialist tourism forms. It will present the tourism players, their activities and the way these are organised as well as the institu-

tional framework they are embedded in. Moroccan Mountain tourism has been chosen as an example as it represents for ca. 20 years a noteworthy phenomenon and therefore exists long enough to explain the development and ongoing processes. On the other side the number of actors is still manageable, so it is possible wholly to explain the existing networks and interactions (LESSMEISTER 2005a).

The underlying theoretical background of this article derives from different concepts of the actual global value chain discussion and mainly from the Global Commodity Chain concept by GEREFFI (1994, 1996). Thus, before going into details about the situation in Morocco, some general theoretical explanations will be pointed out in the following chapter.

2 Global value chains

Global value chains describe the full range of activities which are necessary for the production of goods and commodities, show how these activities are linked and coordinated, how economic value is distributed along the chain, and the dynamic processes they undergo (see KAPLINSKY and MORRIS 2000).

Among the different value chain approaches in existence, especially the Global Commodity Chain concept by GERRY GEREFFI (1994, 1996) gains special importance. GEREFFI focuses on the governance structure and aims to explain how single activities along a particular chain can be controlled and directed. He assumes that governance is performed by one powerful lead-firm in the chain and in this context distinguishes between producer-driven chains and buyer-driven chains. In producer-driven chains huge producers (often transnational corporations) assume this position because of their capital and their knowledge of techniques and processes. Trust and control are central issues. For that, many transactions are done inside the vertically-integrated company (e.g. branch offices or subdivisions). In business relations with external firms the aim must be to exert as much influence over the production process as possible and to bind these firms to the owning company (e.g. through capital investment or personal interrelations). Business relations in producer-driven chains therefore are often long-lasting and intensive ones.

On the contrary, in buyer-driven chains, huge buyers dominate the chain due to their market power and brand names. In buyer-driven chains commodity production is generally rather less labour-intensive than capital intensive; business relations are less in-

tensive and easier to terminate as inter-company relations are only weak; the goods are mostly standardised and therefore do not require special know how. Especially for developing countries, buyer-driven chains hold the opportunity of integration into global market systems. Regarding their global economic importance, GEREFFI predicts a general shift from producer-driven towards buyer-driven chains.

In tourism too, different activities, carried out by different actors in different places, are brought together to form a final “product” which is the organized holiday tour; the transfer of the value chain idea from industrial production on tourism therefore seems to be justified (see also GO and APPELMAN 2001, 184).

But as SCHAMP (2007, 149) rightly states, tourism has not yet been considered appropriately in the actual value chain debate yet. In fact, only a few value chain studies about tourism have been undertaken so far. Besides the studies mentioned by SCHAMP about international flight carriers and hotel chains (CLANCY 1998), German package tours to Jordan (DÖRRY 2005; BARHAM et al. 2007) and tourism in St. Lucia (MOSEDALE 2006), the Cuban tourism industry (BRUNDENIUS 2002) and Moroccan mountain tourism (LESSMEISTER and POPP 2004; LESSMEISTER 2005a, b, 2006) have been analyzed by using a value chain approach.

The article presented here is based upon the aforementioned studies about tourism in the Moroccan mountains. Its objective is to show the tourism players and activities and the way in which they are linked and governed. By that it seeks to contribute to a common understanding of governance in special tourism chains in the developing countries.

In this context it is important to see whether GEREFFI's findings about governance structures in the industry sector are generally helpful for the understanding of tourism chains. It will be shown that chains in the services sector hold special particularities which decisively influence the interactions and constitutional modes of the chain, and that governance and access to power on the one side, and organisation and institutionalisation on the other side should be seen separately.

After this, the different existing types of organisation will be more closely examined. Based on reflections about transaction cost theory we will analyse the reasons and conditions under which a particular type of organisation is chosen. Finally, we do not want only to explain *why*, but also, *when* particular types of organisation are chosen. We assume a coherence of organisational mode and time and therefore

try to integrate the findings about organization into the model of the destination life cycle.

The findings in this paper are based on qualitative interviews, which have been conducted during the period of 2002–2005 with all of the noteworthy Moroccan travel agencies (at the time 15 travel agencies dominated the Moroccan trekking business), as well as with all tour-operators in France, The UK and Germany offering trekking in the important destinations of the Jebel Toubkal, the Ait Bougmez and the M'goun Valley, and in the Jbel Saghro. Altogether 20 tour operators have been interviewed. Finally, 32 qualitative interviews with Moroccan Mountain Guides have been made during the study to support the findings.

3 Tourism development in the Moroccan mountains

Even though during the French protectorate the Moroccan mountains served for tourism purposes, we cannot really speak of international tourism before the late 1970s. In the context of the general change of social values at that time (“Back to Nature”, sustainable resource management etc.) a trend towards alternative and responsible, often nature-based, forms of tourism could be recognised, which also spread to developing countries. At that time in Morocco, a modest trekking tourism could be established (see AIT HAMZA and POPP 2000; POPP 2004). This situation has changed fundamentally since the middle of the 1980s: in the course of the *Projet Haut Atlas Central* (PHAC), initiated by the Moroccan government and realized in cooperation with the French Alpine Club, the infrastructure and personal framework for further tourism development in the mountains have been shaped. In the following years Moroccan trekking tourism saw a veritable boom, mainly in the Western and Central High Atlas regions, which lasted until the middle of the 1990s. Since then tourist arrivals have not risen any further; as a consequence of several terrorist acts carried out by Islamic fundamentalists in Northern Africa, even Moroccan tourism had to face a series of temporally limited, but nevertheless severe slow-downs in regard to the number of tourist arrivals.

Although there is no detailed data about tourist arrivals and overnight stays available, estimates sometimes differ a lot, we can say that the tourism in the Moroccan mountains has already reached a quantitative size which can no longer be overlooked anymore. This becomes even more evident when we

consider the fact that it takes place in only a few peripheral regions (mainly the Valley of Ait Bougmez, the Valley of M'Goun and the Jebel Toubkal) where it contributes considerably to the regional economy (AIT HAMZA and POPP 2000).

4 The value chain in the Moroccan trekking tourism

4.1 Activities and players

Looking upon the necessary activities for a packaged trekking tour we will find that a value chain concept represents an applicable and useful approach to provide us with insights into the organisation and governance structures in this tourism sector. Here too we find, roughly simplified, the components of marketing, research and design (the conception or construction of the tour), production (organisation and conducting of the tour), as well as supplemental services like transport, accommodation and food. If we further consider the players involved, we can locate them on three different geographical levels:

- On an international level we find the international tour operators. The Moroccan market is dominated mainly by French suppliers, followed by British and German ones. Usually the tour operators do the marketing and selling activities. Reputation, resulting from quality and experience, and represented in the company name, is the decisive asset (see WAHAB and COOPER 2001, 325). It is the right image that gives the tour operator access to the final consumer market. Through marketing and branding he must make sure that consumers associate quality and professionalism with the company name; by way of engagement and memberships of NGOs operating in the field of sustainable tourism, associations for tourism quality supervision, insurance etc. he can institutionalise this demand for quality, providing the consumer with objective information to guarantee the reliability of his offer. Most of the tour operators offers include flight and insurance, so that tourists will find everything arranged and do not have to worry about anything when booking a tour.

Only in a few cases tour operators are actively involved in tour planning at the Moroccan destinations. Rather they rely upon their Moroccan partners who design the tours according to their requirements. So in the final analysis they define the end product, but are seldom directly involved in the actual planning process.

- The national Moroccan travel agencies operate on a national level, where they work as the incoming agency for their international partners. As already mentioned, they conceive and plan the tours, but their actual function is that of a full package supplier. They hire the personnel, establish the contacts with other tourism actors (e.g. mountain guides, hotels, transport agencies etc.) and provide the necessary equipment and food. Their core competency can therefore be seen in intermediaries and in logistics. Up to a certain degree they try to internalise as many activities as possible in their own company in order to minimise dependency on external actors and to be able to cover the full range of requisite services. On the other hand, they must remain flexible enough to respond to changes on the demand side, and to minimise the average fixed costs. The right strategy to bring those opposing aims into balance is often seen in tightly-linked networks, often bound by family or ethnic ties. These dense, familial networks are thus not to be seen as an instrument for maximising economic profit, but to minimise risks through trust and personal relations.

- The actual conduct of the trekking tour in the mountains is up to the local actors. The first one to be mentioned here is the mountain guide (*guide de montagne*). He is responsible for the unobstructed and secure stay in the mountains. He guides the group and directs the accompanying team. But furthermore he has to fulfil the role of a cultural intermediary, allowing the tourists to gain a deeper insight into Moroccan everyday-life and answering all of their questions. Besides, he has to act as an “animator”, taking care for his guests 24 hours a day. Being the team-chief and the contact person for the tourists at the same time he often finds himself bonding between tourists and local people. It is his personality and charisma that often decides whether tourists perceive their holiday as a positive experience or a waste of money.

Most of the mountain guides work as freelancers, being hired by travel agencies in case of need; fixed employments are rather exceptional.

The accompanying team further consists of the muleteers, who are in charge of transport of the food, equipment and tourists' luggage. They build up the campsite and, if there is no additional cook, also prepare the food. A special position is held by the chief-muleteer, who is the contact person for the travel agencies and is in charge of the team. In many cases the chief-muleteers provide guest rooms for the tourists or even run a small guest house, called *gîte d'étape*.

Table 1: The national travel agencies in Morocco

	Company foundation	Origin of firm owner	Experience in tourism before company foundation	Location
Ribat Tours	1984	Rabat	none	Marrakesh
Desert et Montagne	1985	France	Mountain Guide, Instructor at Tabant	Ouarzazate
Atlas Sahara Trek	1987	France	Mountain Guide, Employee at a travel agency	Marrakesh
Tizi Randonnée	1988	Kenitra/ Fes	none	Kenitra (+branch in Marrakesh)
Dynamic Tours	1990	France	Employee at a tour operator	Casablanca (+branch in Marrakesh)
Tourisport	1992	no data available	Mountain Guide at Atlas Sahara Trek	Marrakesh
Sport Travel	1992	France	Employee at a travel agency	Marrakesh
Loisir et Voyage	1992	Marrakesh	Owner of a travel agency	Marrakesh
Adrar Aventure	1992	Imlil	Mountain Guide at Atlas Sahara Trek	Marrakesh
Algeria Tours	1994	France	Mountain Guide, Owner of a travel agency	Marrakesh
Mountain Safari Tours	1996	Ait Bougmez	Mountain Guide	Marrakesh
Ame d'Aventure	1996	Ait Bougmez	Mountain Guide at Atlas Sahara Trek	Marrakesh
Pampa Voyage	1996	Belgium	none	Marrakesh
Culture Nature Voyage	1998	Ben Slimane, Imlil	Mountain Guide at Ribat Tours, Employee at Ribat Tours	Marrakesh

4.2 The powerful position of the tour operators

The ideal configuration of a value chain in the Moroccan trekking tourism sketched above shows a relatively simple structure; the single activities can be easily related to particular actors. But this international subdivision of work has existed only since the second half of the 1980s. Before this, most of the activities were done by the tour operators themselves. Since that time they are able to out-source single steps in the production process, such as organisation, logistics and tour guiding, to skilled Moroccan partners. This caused a win-win situation for both sides: for the Moroccan side the integration into the tourism chain opened up access to European markets. The tour operators could instead reduce a part of the costs that arose because of the high expenditures for logistics and organisation (buying and transport of equipment, hotel bookings, taking care of tourists etc.). Because of the comparable limited number of tourists in this special tourism segment, these costs are hard to compensate. Only a few tour operators

consistently reach a sales figure which is needed to run an own income agency profitably. Especially because of the almost entirely lacking infrastructure in the initial phase of the Moroccan tourism the tours had the character of real expeditions. Consequently they were considerably more expensive and could cover only a small and very special market segment.

Through out-sourcing of some of the activities to Moroccan associate partners, the production costs could be brought down and trekking tours in Morocco could be offered at a lower price. By this, the destinations in Morocco were made competitive on the international market and were increasingly in demand in the following years.

The description of activities and players already gives a hint of the powerful position of the tour operators and the thus resulting dependency structures. For most of the Moroccan players, access to the final consumer market is only possible indirectly, by way of co-operation. Without a partner in the source market there will be no way to sell their services. Therefore they need the tour operators' reputation

to sell trips to Morocco, and it is precisely the direct access to the final consumer, which brings the tour operator to such a powerful position and makes them the “gatekeepers to tourism” (IOANNIDES and DEBBAGE 1998).

4.3 The organisation of business transactions in the trekking tourism – a buyer-driven chain?

In Moroccan mountain tourism the tour operators could be identified as the dominating lead firms because of their monopoly on the access to the final market. So at first glance GEREFFI's preconditions for a typical buyer driven chain seems to be fulfilled. The GCC-approach turned out to be an appropriate way to explain who is governing the chain and where the underlying power to do so is arising from. But if we have a more detailed look on the way transactions are organized, we will find a more differentiated structure behind it. It is true that the tourism chain is governed by a typical buyer, but with regard to organisation structure the reality differs a lot from what an ideal buyer-driven chain is supposed to be:

1. The relationships between the single participants are relative long-lasting ones; changing an associate partner happens rather seldom. In 2004, the average length of the co-operation between a European tour operator and its Moroccan partner agency was about 12 years. Almost half of the market dominating tour operators in Morocco have worked since day one with the same partners.

But at the same time, business integration as well as any kind of technical, financial or organisational interrelation is only very weak, if it exists at all. Face to face contacts are very rare (most partners meet only once a year to check up the programme and to confirm the necessary routines for the next season); communication is rather formlessly done by fax, e-mail or phone. In this context it is worth mentioning that written contracts are not common in the business; most arrangements are made verbally. The absence of contractual terms, however, must not be seen as an indication for strong mutual trust which helps to reduce transaction costs in business relations (LORENZ 1999). In fact it has more to be seen as an expression of missing options for action due to the lack of trust in the Moroccan legal system.

So, all in all, the relations are quite durable and therefore correspond with the concept of a producer-driven chain, but without showing the postulated intensity. And with the tour operators, typical buyers could be identified as the lead firms, while the

Moroccan actors typically carry out the less capital, but labour-intensive activities. This again would speak for a buyer-driven chain. But in our case we do not find a high fluctuation with easily changeable partners in the business relations, as it is typically for the production of standardised, labour-intensive goods (KAPLINSKY and MORRIS 2000, 19). The organisation form in the tourism value chain may be most likely described as a kind of hybrid form: a strong and long-lasting, and therefore *untypical* buyer-driven chain.

2. Until recently, the organisation pattern described under point 4.1 represented the dominant form of co-operation. But over the last years this situation is on the point of change. On the one side we could find GEREFFI's postulated idea about the transition from a producer-driven chain (with the tour operators doing all necessary activities like marketing, conception, organisation, logistics and guiding of the tours) into a buyer-driven chain (in which the tour operators are mainly concentrating on marketing and branding and have externalised the remaining activities to Moroccan players) to correspond with tourism development in the Moroccan mountains. But recently we can observe two, by all means contradictory trends: some European tour operators have established their own incoming agency and have thereby re-internalised some of the former outsourced activities. In the meantime four of the twenty analysed tour operators have their own income agency in Morocco; three more deal directly, without involving a Moroccan travel agency, with Moroccan Mountain Guides who act as their contact person in the country. At the same time other tour operators have ended a former co-operation and continue their work with a new partner. Seven tour operators have already changed their associate partner in Morocco once or even on several occasions (see Tab. 2). Generally speaking, the terms of trade are developing to the disadvantage of the Moroccan players.

So we can state a paradoxical situation in which some of the organisational structures follow the ideal of a buyer-driven chain, others fit more into the concept of a producer-driven chain, while most of the observed relations lie somewhere in between.

This phenomenon cannot be adequately explained within the concept of Global Commodity Chains. In the following we will therefore itemise the existing organisational structures and analyse them in the light of transaction cost theory to make comprehensive why and when tour operators opt for a particular organisational structure.

Table 2: Business co-operations between international tour operators and Moroccan travel

Tour operator	Associate partner in Morocco	Former associate partner	Number of tours in Morocco per year (Ø)
Allibert	Allibert Maroc	Dynamic Tours	2,500
Atalante	Moroccan Mountain Guide	no data available	700
Club Aventure	Dynamic Tours	---	2,500
Discover Adventure	Adrar Aventure	Moroccan Mountain Guide	200
Exodus	Dynamic Tours	Dynamic Tours	350-400
Explore	British Tour Guide; Moroccan Mountain Guide	British Tour Guide; Moroccan Mountain Guide	no data available
Guerba	Mountain Safari Tours	Tourisport	220
Hauser	Ribat Tours	Ribat Tours	300-400
La Balaguere	Culture Nature Voyage	no data available	1,000
La Burle	Culture Nature Voyage	Ribat Tours	600
Nomade	Culture Nature Voyage	Ribat Tours	750
Nouvelles Frontières	Algeria Tours; Nouvelles Frontières Maroc	Algeria Tours	75,000
Schulz Aktiv	no data available	no data available	20
Sherpa	Culture Nature Voyage	Culture Nature Voyage	220
Tamera	Algeria Tours	Algeria Tours	250
Terre d'aventures	Terres d'aventure Maroc	Atlas Sahara Trek	2,500
Adventure Company	Ame d'aventure	Moroccan Mountain Guide	500
Wikinger Reisen	Ame d'aventure, Atlas Sahara Trek	Atlas Sahara Trek	100
Zig-Zag	Culture Nature Voyage	Culture Nature Voyage	300-400
Horizons Nomades	Tizi Randonnée	no data available	no data available

5 Transaction cost theory and the organisation of special tourism value chains

Transaction cost theory provides us with detailed insights about the decision when to perform activities inside one's own company and when to outsource (*make or buy decision*; see: WILLIAMSON 1994; BICKENBACH et al. 1999; LORENZ 1999). In short, transaction cost theory predicts that, under purely economic presumptions, single steps in the production process are externalised when cost reduction can be achieved thereby. This is particularly true for standardised goods where no specific "know-how" for the production is necessary or when this knowledge can be codified and is easily available. In that case no competitive advantage through innovation can be achieved. Technology and research intensive goods are only procured externally, when the costs for research and production cannot be amortised through sufficient quantities (*economies of scale*). By contrast, goods and services are made inside the company when input of technology, capital and research will result in an innovative advantage or huge quantities will return in higher profits through scale-effects.

Beyond these rational reflections, so called transaction costs have to be considered in the decision process (if goods cannot be just simply bought on the market): to externalise processes, a suitable partner has to be found (*information and search costs*), the conditions for co-operation have to be negotiated (*bargaining costs*), the performance of the associate partner has to be monitored (*monitoring costs*) and in case of need adaptations have to be made. Costs may also arise for policing the other party to make sure it is honouring the terms of the agreement (*enforcement and policy costs*). Finally, additional costs for transport and storage have to be calculated. Only in consideration of these transaction costs the decision for outsourcing can be made. Still, there is uncertainty remaining, because it is almost impossible to foresee all the eventualities which can arise in the course of cooperation. It is very difficult to completely negotiate the performance of a future partner ex ante or to control its outcome ex post. In the above case, business partners have to face the risk of opportunistic behaviour when one of them violates the agreement to obtain an unfair competitive advantage.

What makes things even more complicated in tourism is the fact that services generally are defined as *experience* or *reliance goods* (PIEPER 2000, 22). This

means that their quality cannot be proved in advance before consumption, or even cannot be proven at all (e.g. a tourist may only find out during the trip whether the tour guide is competent and friendly; he may possibly never find out whether the Eco-trip he has booked really has no negative effects on wildlife and nature). Fixed arrangements which can be proven by way of quantifiable and measurable criteria concerning product or process quality, as is the case in commodity production, is nearly impossible in tourism services.

Keeping these reflections in mind, the following four possible ways in which transactions and relations in the Moroccan Mountain tourism are organized, will be explained.

- **“Untypical” buyer-driven chain**

While at the beginning of the Moroccan trekking tourism the tour operators carried out all of the requisite activities, since approximately the second half of the 1980s an international repartition of work in which the tour operators are now acting as powerful buyers, who compose their offer to a great extent out of external services took place. But the cost reduction realised thereby goes hand in hand with a reduction of direct influence on the production process. This, in consequence, holds the risk of inconsistent quality. It turned out that the interaction between tourists and local actors (especially the mountain guides) represents a critical point during the trip. If the guide does not manage to strike the right tone and to animate the group, tourists will perceive (and keep in mind) their holiday as having been a bad experience (see MOTIAUX 2002, 50). The interaction with the tourist is almost the simultaneous moment of production and consumption. It is the most critical and sensitive point, and at the same time the most difficult one to handle by *ex ante* agreements (GO and APPELMAN 2001, 184). Social interaction cannot be regulated by standards or product norms; the decisive criteria are “human qualities” or so called *soft skills*, in other words: the experience, character and demeanour of the tourism actors. By means of questionnaires, handed out to each tourist at the end of the trekking tour, the tour operators hold an instrument in their hands which allows for control of their associate’s performance; but it can show criticism and problems only after the tour has already finished.

Because of these particular features, transaction cost theory plays an important role for the explanation of the long-lasting business relations and the underlying governance structures mentioned before. Existing co-operations are not only ruled by expe-

rience and trust in the current partner, but also by uncertainty and risks that may arise in a new partnership. The Moroccan travel agencies (and in consequence the local actors they are working with) make their name through reliability and a constant quality performance. Or, in other words: they profit from the existing climate of uncertainty and potential risks. Almost none of the tour operators interviewed has 100% trust in the performance or loyalty of its partner; but all of them consider minor disagreements less problematic than the risks and the uncertainty they would face in a new partnership (even if a potentially new partner could offer cheaper prices). Transaction costs, which can only be avoided through agreements, therefore offer a plausible explanation for the untypical long-lasting business relations in the case presented here.

In this context again, the lack of trust in the Moroccan legal system must be mentioned. None of the tour operators consider it as a realistic option to go to law. Legal proceedings in Morocco are reckoned to be very long, bureaucratically complicated and with rather dubious outcomes. For most of the Moroccan actors, legal action remains impossible anyway, simply because of the financial costs arising. This may be a reason for the absence of written contracts; practically speaking they are of no use when there is no way of enforcing their content by legal action. Then experience and trust gain much more importance.

- **Vertical integration by opening a branch office in Morocco (producer-driven chain)**

The wish to control and to influence the activities along the chain still remains the main purpose for the tour operators. This is best expressed through a company-owned incoming agency in the country. Although financial reasons play a role as well, as the profit margin calculated for the Moroccan travel agency can be saved, the real reason has to be found within the field of control. More important than the financial aspect is the possibility to actively shape the tourism services in Morocco according to their requirements, to control them and to flexibly change them without any additional costs for coordination with an associate partner.

It is a paradoxical situation that especially those travel agencies face the risk of being dropped when the business is doing well, because the tour operator’s costs for running their own incoming agency have to be compensated through sufficient demand. According to the tour operators interviewed, the profit zone for an incoming agency begins above approx. 2,000 bookings per year.

So, sufficient demand is a necessary (but not the only) precondition for the tour operators' choice to open their own agency, but it is not an obligatory one. In reality not all of the tour operators that could run an agency profitably have done so. Although the number of bookings would economically justify the internalisation, some of these tour operators still proceed to work with a Moroccan agency. For this decision too, transaction cost theory can deliver the reason: the internalisation of an incoming agencies' scope of activities is related with additional costs for establishing and keeping the contacts with a variety of local actors (mountain guide, muleteers, cook, owner of guest houses etc.). While these costs arise only once in the partnership with a Moroccan agency they multiply when several actors have to be coordinated.

The financial calculation is thus just one point tour operators have to take into consideration when they think about internalising the "production activities". Besides a sufficient demand they must also have access to local networks and constantly stay in touch with the local actors (if these actors should not be integrated as well; in this case they have to be paid during the off-season too, which would again result in higher total costs). The decision in favour of vertical integration requires a well-functioning network, experience and knowledge in dealing with local people and actual information about the current situation in the mountain sites. This is by far not true for all the tour operators doing business in Morocco. Besides, not all of them are willing to take the risk and the efforts related to the decision of internalisation of activities.

- **"Quasi-internalisation" in case of insufficient demand**

Some tour operators refuse to work with a Moroccan travel agency, even though they cannot sell a sufficient number of tours to cover the costs accruing for an incoming agency. Instead they use a key person, in most cases a mountain guide, who runs their "unofficial branch office", which normally consists of a "one man act" in the guide's person only. This form of corporation is at least true for three tour operators in Morocco; it is, however, the usual practice for associations, private organisations and smaller tour operators who only sporadically sell tours to Morocco. In this case the mountain guide fulfils the work of an incoming agency (but is much cheaper), albeit without official authorisation. In the laws *Loi N° 31-96 portant statut des agences de voyages* and *N° 30-96 portant statut des accompagnateurs de tourisme, des guides de tourisme et des guides de montagne* the

Moroccan state has clearly defined the legal framework and responsibilities for the single Moroccan tourism actors. By this, mountain guides are restricted to guiding activities in defined mountain regions only. All kinds of planning, organisation and mediation fall within the responsibility of the travel agencies. Direct cooperation between a tour operator and a mountain guide without passing through a travel agency thereby is illegal. To enter the business the Moroccan state charges a capital buy-in of 200,000 MAD (about 20,000 Euros) for launching a travel agency. This is a considerable amount of money, which only a few mountain guides can afford. Nevertheless, cooperation between mountain guides and European tour operators does exist. In that case both parties act illegally, even though this kind of partnership is considered to be very profitable for both sides: the tour operator can reduce costs by saving either the profit share for a Moroccan travel agency or by saving the costs that he otherwise would have to pay for running his own agency. At the same time a single key person minimises the effort for searching and keeping contact with suitable local actors. The mountain guides' benefit consists of security and social reputation deriving from a fixed and comparable high salary.

That this (illegal) kind of operation is possible at all reveals a severe problem concerning official regulation. Though the Moroccan state has tried to set rules (without real success) for the business interactions in tourism, the legal framework turned out to be insufficient to regulate the complexity of the existing corporations. It is nearly impossible for the authorities (mainly the so called *brigade touristique*) to control all mountain sites and actors in Morocco. The activities of the *brigade touristique* remain, ill-equipped and with insufficient financial means, restricted to the bigger cities. The fact that many tourism players accuse officials of the public services of being corrupt and do act arbitrarily furthermore reveals another dimension in this discussion, which is only hard to handle.

- **Loose network relations (typical buyer-driven chain)**

Apart from long-lasting relations and (quasi) integrated business structures in recent time a fourth organisational structure has evolved, which is featured in more volatile business relations. We know that seven of the dominant twenty tour operators have already changed their partner agency once or even several times. As in the case of vertical integration, this development too, which disadvantages the position of the Moroccan agencies, arises

paradoxically out of their quality and professionalism. Constant learning processes and the spread of knowledge have made all the established travel agencies in Morocco to operate on a comparable high level of performance today. As a consequence, each of the risks is replaced by another one. Most tour offers in Morocco are similarly structured; they follow the same paths in the same destinations and offer comparable services. Therefore, a tour operator who is offering the standard package may change his partner and carry on with another one without the fear of taking great risks. The average high level of performance in Morocco nowadays minimises the risk of high transaction costs, which previously had made the tour operator stick with his partner for a long time. On the other hand, the competition between the Moroccan players is getting fiercer while their position vis-a-vis the European tour operators is constantly getting weaker. For a Moroccan travel agency the end of a partnership with an important tour operator may also imply the end of the agency or at least a huge financial loss.

But changing the associate partner (or threatening to do so) happens not only under the aspect of profit maximising, e.g. by cutting down prices in negotiations. Maintaining the total quality of the offer also plays an important role. Usually a new partner is chosen when he can promise better service and a higher degree of reliability under the same financial conditions as the former one, or can at least offer a similar service but takes less money. Significantly, the financial aspect becomes more and more a decisive one. Increasing concurrence in this segment and the generally changing consumer behaviour (growing demand for shorter and cheaper holiday trips) is resulting in higher economic pressure on the tour operators, who, in consequence pass this pressure on to their partners in Morocco.

6 Governance and organisation structure

In terms of *governance*, Moroccan mountain tourism could clearly be identified as a buyer-driven value chain. But the way in which the single activities along the chain are *organised* can follow different ways, as shown above. As a matter of fact, GEREFFI's assumption of only two possible types of governance in the GCC-concept has often been criticised for its simplicity (KAPLINSKY and MORRIS 2000, 34; SCHMITZ and Mc CORMICK 2001, 43). In a more recent concept, GEREFFI et al. (2005) have replaced the former dichotomy through the possibilities of modular, relational

and captive chains (which continue between market and hierarchy) and thus allow for a more differentiated point of view about governance in value chains. Despite this, types of governance should principally be distinguished from modes of organisation (see also PONTE and GIBBON 2005). When it comes to the question of the overall governance along the entire chain and the power it is based upon, the distinction into buyer-driven and producer-driven chains still remains useful. The organisational structures of value chains should indeed be thought of as being more differentiated: the power to govern and to control the activities in the case presented here derives from the access to the final consumer market, which the tour operators have managed to monopolise. Their reputation, which is formed by the tour operators (institutionalised) commitment to follow a particular way of travelling (in this case sustainable, alternative tourism) and the tourists' experience, must be seen as the key to power in this business. Therefore, branding and marketing are the core issues in this special segment of tourism. This makes Moroccan mountain tourism without any doubt a buyer-driven chain, even when the organisational structure does not correspond with the ideal configuration (e.g. in the case of a vertically-integrated trekking business; the lead firm's core competencies are typical for a buyer-driven chain but the organisational structure rather corresponds to GEREFFI's idea of a producer-driven chain).

Yet it can be assumed that a particular organisational structure is not a constant state but undergoes a temporary change and adapts to the development of a destination.

7 Organisational structures in the life cycle of destinations

One assumption that can be drawn from the practical observations is the correlation of particular modes of organisation with different phases of development in the destination life cycle (see BUTLER 1980, 1989; DEARDEN 1991). The predicted temporary process depends on three aspects: the business efficiency of the tourism players at the destination (developed through diffusion of knowledge and organisational learning processes); the stage of the destination in the life cycle and the related consumer demand; and finally the market position of the tour operator. In the following we will try to integrate the presented organisational structures in the Moroccan trekking tourism into a simplified model of the destination life cycle.

Table 3: Company data of the international tour operators

Tour operator	Company foundation	Number of Personnel	Branch offices	Shareholding and joint ventures	Number of tours sold per year (Ø)
Adventure Company Ltd.	1996	18	---	Part of <i>Travel PLC</i> group	8–10 000
Allibert S.A.	1978	60	4	---	10,000
Atalante S.A.	1986	35	2	Shareholder at <i>66° Nord, Terra Incognita</i> (100%); Co-operation with <i>Continents Insolites</i> (tour operators)	7,000
Club Aventure S.A.	1978	50	3	Co-operation with <i>Sport Away Voyages</i> (tour operator)	12,000
Discover Adventure	1994	9	---	---	no data available
Exodus Ltd.	1975	75	---	Part of <i>Travel PLC</i> group	30,000
Explore Ltd.		120	---	Part of <i>Holidaybreak PLC</i> group (forms Holidaybreak's Adventure Division together with the specialized tour operators RegalDive and Djoser)	30,000
Guerba Ltd.	1982	20	1	---	4,500
Hauser GmbH	1973	28	2	Shareholder at <i>Nepal Reisen GmbH</i> (75%); <i>SK Tours</i> (Wien), <i>Luftbansa Partner Tours GmbH (LPT)</i> : sometimes ventures with smaller tour operators; owns a hotel in Kathmandu	8,500
La Balaguere S.A.	1984	35	1	Owens three private pensions in the Pyrenees	13,000
La Burle S.C.P.	1978	9	---	---	3,500–4,000
Nomade Aventure S.A.	1975	22	2	Part of <i>Voyageurs du Monde</i> ; Interfirm co-operations with Comptoir des Voyages, Terre d'aventure (tour operators), La Villa Nomade (hotel in Marrakesh)	6,500
Nouvelles Frontières S.A.	1967	1,600	200 (50 of them under franchise)	Part of <i>Travel PLC</i> group; owns 25 Hotels, flight carrier <i>CORSAIR</i> ; since 2004 all hiking and trekking tours are distributed by the company's subdivision "Nouvelles Frontières Rando & Trek"	1,600,000
Schulz Aktiv Reisen	1990	8	2	---	1,000
Sherpa Ltd.	1973	7	---	---	3,000
Tamera S.A.R.L.	1993	8	---	---	1,800
Terre d'aventures S.A.	1977	50	4	Part of <i>Voyageurs du Monde</i> ; Interfirm co-operations with Comptoir des Voyages, Nomade d'aventure (tour operators), La Villa Nomade (hotel in Marrakesh)	no data available
Wikinger GmbH	1969	60	4	Shareholder at <i>Wikinger Individuell</i> (Interfirm holding 75%), <i>Kodiak Reisen</i> (49%)	27,000
Zig-Zag S.A.R.L.	1984	18	---	Co-operation with: <i>Objectif Lune</i> , (Epinal), <i>Sfera Tours</i> (Brussels), <i>Delta Adventure</i> (London) (tour operators)	6,000

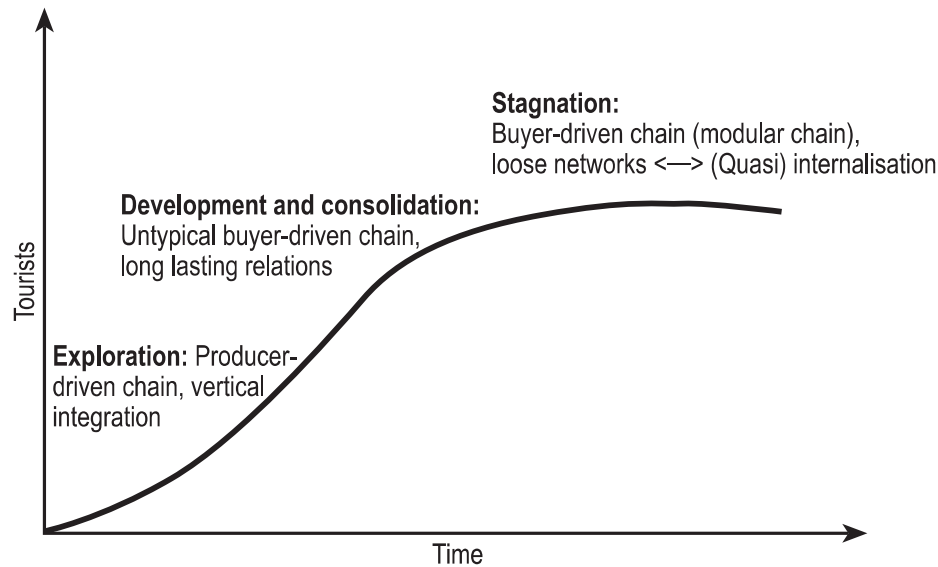


Fig. 1: Governance and organisation in the course of the destination life cycle

In the *Explorer stage* only a few international tour operators offered tours in the Moroccan mountains. At that time they designed the tours, took care of the logistics and organisation and also guided them in the destinations. Thus, they acted as *producers*, integrating all the necessary activities in the own company. Moroccans were only barely involved in the business and if so, they only played a subordinated role. The tours had an expedition character and were relative expensive. The total market volume was rather low but the first comers among the tour operators were able to realise innovative advantages against other competitors. During the *development and consolidation stage* increasingly more Moroccan players entered the scene and enabled the tour operators to out-source the “production-activities”. Although this meant costs for controlling and fine-tuning to achieve the required quality level, in the end trekking tours in Morocco became cheaper and increasingly interesting for a growing number of tour operators, which mainly focused on destinations in the High Atlas. At this stage information about tourism players who could possibly act as partners were rare, and in consequence a high degree of uncertainty existed. When an associate partner could meet at least the rough expectations, it was the better strategy to invest and keep up this relationship than to search for a probably (but not necessarily) better fitting one. Quality and risk minimising, rather than the question of price, determined the success on the market and therefore caused the atypically long lasting buyer-driven chains.

Since the second half of the 1990s the Moroccan Mountains have entered the *stagnation stage*. A few destinations can record a very high but constant number of tourist arrivals and the dominant tourism players have established their tourism offers. While the number of tourists remains more or less the same, the number of tourism actors in Morocco is constantly rising. At the same time, knowledge of the requisite standards and services in tourism has become ubiquitous. The increasing number of well-trained and experienced actors in Morocco lowers the risk of high transaction costs for tour operators in search of a new (and cheaper) partner. Price has become a decisive criterion for competitiveness; instead, competitive advantages can hardly be realised. The aim now goes for cost reduction, while at the same time quality has to be maintained (or even improved). This has consequences for existing business corporations: tour operators who do well in the business and have sufficient experience, as well as established networks in the country may opt for the integration of activities in their own company. For those who still have to work with a Moroccan travel agency transaction costs become less important because of the generally high level of performance in Morocco. At the same time concurrence between the Moroccan players is still rising, so tour operators can gain from this situation when negotiating the prices.

Although the temporary process sketched above represents a very simplified model of organisational modes in accordance with the destination life cycle,

it may contribute to a general understanding about the organisation of special tourism offers. SCHAMP (2007, 148) points out that in tourism too, we can recognise a turn towards post-fordist ways of production. Individualisation and life style pluralism generate different modes of tourism behaviour and demands. Tour operators must therefore have the ability to react flexibly towards different and varying consumer behaviour. Thus, apart from the standard package tour (which because of the considerable low price level is nevertheless still selling well, mainly in the form of *all-inclusive* or *last minute* offers) an increasing number of specialised package tours have been established, responding to a more sophisticated recreational behaviour that goes beyond the standard holiday. This is especially true for alternative tourism offers like the trekking tourism presented here. Small tour operators, who are able to act flexibly, can gain competitive assets in this segment because here quality is rated as more important than price. They make their name by defining themselves as specialists, who have at their disposal intimate regional or thematic knowledge, the big tourism companies are not able to offer. So they define their position by explicitly distancing themselves from the mass tourism of the big companies. The importance of quality and knowledge for building up the necessary reputation which allows smaller tour operators to survive on the market, has already been shown above (see also IOANNIDES and DEBBAGE 1998; LESSMEISTER 2006). However, the growing importance of special tourism offers has meanwhile also been recognised by the big companies who increasingly try to place own "brands" on the market, or simply overtake one of the established special tour operators (see Tab. 3). This concentration process has not by far come to its end, as the example of the recent decision on a merger between TUI AG and the First Choice Group to create TUI Travel PLC group demonstrates. The concentration process in the industrialised countries will have without any doubt effects on the organisational modes and the power relations in tourism value chains to developing countries as well.

Still, many tour operators do co-operate with an incoming agency, which organises and performs the necessary activities in the country and for that reason stay in touch with local actors in Morocco. Their knowledge about reliable partners and their well functioning networks are inevitable precondition for a high standard, but still flexible travel organisation. SCHAMP (2007, 156) therefore terms the national travel agencies the "sub knots" in the tourism business (see also LESSMEISTER 2005a, 127). According to

the terminology of GEREFFI et al. (2005) he classifies the business corporations in tourism as relational value chains. By this he attributes the travel agencies a relatively high degree of influence on the offer. GEREFFI et al. (2005, 84) describe relational chains as "complex interactions between buyers and sellers, which often create mutual dependence and high levels of asset specificity. This may be managed through reputation, or family and ethnic ties".

Taking this into consideration, the incoming agencies' core competencies had to be seen within the field of complex problem solving (namely the conception of the tour offer). Within STABELL and FJELDSTAD's concept of value configuration, this competence would best correspond with their idea of a *value shop*, which is characterised by a complex process of mutual interaction and intensive communication in order to solve individual problems (STABELL and FJELDSTAD 1998). However, for the case of the Moroccan mountain tourism this is barely any longer true. A possible solution for this contradictory situation could be found in the model of the organisation life cycle sketched above: in the early years of trekking tourism in Morocco (development stage), the national travel agencies indeed had more influence on the construction of trekking tours because of their detailed knowledge about potential destinations and their intimate relationship to the few qualified and reliable local actors. In the course of the destination life cycle this knowledge increasingly lost its importance. The high demand tour offers began to concentrate on a few regions and comprised comparable standard packages. Though most of the tour operators, as well as their associated partners are still able to deliver tailor-made individual tours they mainly sell standard offers which have not changed much during the last years. This may also be a reason for the only sporadic communication between tour operators and their Moroccan partners (see 4.3), which does not correspond with the idea of the relational value chain GEREFFI et al. have drawn.

The competence of the Moroccan travel agencies no longer assists in solving problems (defining the flexible construction of attractive trekking tours to a competitive price as a problem that has to be solved in close cooperation between tour operator and incoming agency). Rather they compose a limited number of tours packaged from set modules according to the tour operators' requirements. In that sense they have to be seen as intermediaries or nodes, which provide the necessary services and charge for the appropriate personnel. Hence, their core competency is the connecting function and therefore the underlying

value logic rather corresponds to what STABELL and FJELDSTAD call a *value network*. Transferring these findings to the governance typology of GEREFFI et al., the (ideally configured) value chain in the Moroccan mountain tourism nowadays corresponds with the concept of a modular chain, which is defined as a value chain, in which “typically, suppliers [...] make products to a customer’s specifications, which may be more or less detailed” (GEREFFI et al. 2005, 84). Obviously, the changing conditions of a destination over the course of the life cycle also effect the value configuration of the participating players and hence the governance structure and the modes of organisation (Fig. 1).

The further development of Moroccan mountain tourism remains an open question, likewise, whether the findings presented show a unique phenomenon or the common situation in a special tourism segment. It turns out, however, that the question about governance in tourism value chains represents a complex subject which cannot as yet be answered without contradictions. Above the proposed distinction between power and governance on the one side and organisation on the other, the underlying value configuration of the participating players in a particular value chain should be considered as well. Especially for the conception of a life cycle model in which the interdependencies between governance, organisation structure and value configuration are explained in the context of the destination development, additional empirical data from other destinations is needed.

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