

**SOME OBSERVATIONS ON TOURISM DEVELOPMENTS IN A PERIPHERAL
REGION AND THE VALIDITY OF GLOBAL VALUE CHAIN THEORY.
THE ANTI-ATLAS MOUNTAINS IN MOROCCO**

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With 1 figure and 1 supplement

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Summary: This paper has two different yet complementary aims. The first section, based on comprehensive empirical analysis and descriptive research, portrays a region that has yet to be much affected by tourism in terms of what can be observed so far and its potential. This research, which is contained in a detailed tourist map of the western Anti-Atlas (included in this contribution), is an attempt to systematically collect information on the region that is relevant for tourism. The cartography itself was not based on an explicit theory; instead, it is the synthesis of many years of experience visiting the area. The map is designed to provide assistance to tourists travelling to the Anti-Atlas, i.e., it is intended for practical purposes. In the second part of this contribution, some of the results from the empirical research are examined in terms of their correspondence with global value chain theory, and the validity of theoretical hypotheses is tested against the empirical results. In the first part of the paper, the western Anti-Atlas is introduced as a region with considerable tourism potential that has yet to see much development. The region's features that are relevant for cultural and heritage tourism (natural and cultural heritage sites) are described and mapped on the basis of the authors' own research and visits. Transport infrastructure and accommodation are also incorporated fully into the map, again based on the authors' own visits and interviews with local actors. The reasons that tourism has seen little development are presented, and it is observed that the international visitors encountered in the region differ from the classical type of package tourist in many ways. Thereafter, the validity of global value chain theory is assessed in the region. Recent theoretical approaches have demonstrated that international tourism even in peripheral regions of so-called "developing countries" follows the principles of global value chains. These state that travel operators in Europe, North America, Japan and Australia dominate and control tourism, and that local actors in the destination country are unable to break out of this grip with alternative strategies. This paper takes as its starting point the observation that the dependency observed and empirically confirmed elsewhere in fact hardly exists in the Anti-Atlas, and that other factors are at work. The results of our empirical research are used to test the validity of global value chain theory (and to refute its global validity). Finally, the region is characterised as a tourism destination in which global value chains have apparently been broken, with tourists booking tourism products directly with (accommodation) providers in the region.

Zusammenfassung: Der Beitrag verfolgt zwei unterschiedliche, sich jedoch ergänzende Ziele. In einem ersten Teil wird eine touristisch bislang wenig geprägte Region hinsichtlich ihrer touristischen Potentiale wie auch ihrer bislang beobachtbaren touristischen Praxis beschrieben auf der Basis umfangreicher empirisch-analytischer, deskriptiver Forschung. Diese Forschung, die in Form einer detaillierten „Touristischen Karte des Westlichen Antiatlas“ zusammengefasst wird (und diesem Beitrag beiliegt), ist der Versuch einer systematischen Sammlung tourismusrelevanter Informationen für diese Region. Der Erstellung der Karte liegt keine explizite Theorie zugrunde, vielmehr ist sie eine Synthese langjähriger Landeskenntnis und Geländebegehung. Sie soll für Touristen eine Hilfe bei der Durchführung einer Reise in den Antiatlas sein, somit praktischen Zwecken dienen. In einem zweiten Teil werden einige der empirisch gewonnenen Ergebnisse dazu verwendet zu fragen, inwieweit diese den Annahmen der global-value-chain-Theorie entsprechen. Somit soll mit Hilfe der empirischen Befunde die Gültigkeit der theoretischen Annahmen überprüft werden. Zunächst wird die Region des Westlichen Antiatlas ausführlich vorgestellt, und zwar als mit einem hohen touristischen Potential ausgestattete, aber bisher nur recht wenig erschlossene Destination. Eigenschaften der Region, die für einen ländlichen Kultur- und Heritage-Tourismus von Relevanz sind (Objekte des Natur- und Kulturerbes), werden auf der Basis eigener Recherchen und Geländebegehungen vollständig erfasst, beschrieben und in die thematische Karte integriert. Auch die Verkehrsinfrastruktur und die Übernachtungsbetriebe werden in ihrer Gesamtheit in der Karte berücksichtigt, basierend auf eigenen Begehungen und Interviews mit den Akteuren vor Ort. Die Gründe für die bislang geringe touristische Erschließung werden dargelegt. Zugleich wird konstatiert, dass die dort anzutreffenden internationalen Touristen in vielfältiger Weise vom klassischen Typ des package tour-Touristen abweichen. Sodann erfolgt die Überprüfung der Gültigkeit der global-value-chain-Theorie für den Tourismus in unserer Region. Neuere theoretische Ansätze haben gezeigt, dass sogar der internationale Tourismus in Peripherregionen der sog. „Entwicklungsländer“ dem Prinzip dieser global-value-chains folgt. Demnach nehmen die Reiseveranstalter in Europa, Nordamerika, Japan und Australien die dominierende Rolle für

das touristische Produkt ein und steuern es. Aus diesem Zwang können sich die Tourismusakteure im Zielland durch Alternativstrategien nicht lösen. Vorliegender Beitrag geht demgegenüber von der Beobachtung aus, dass diese (anderswo empirisch voll bestätigte) Abhängigkeit im südmarokkanischen Antiatlasgebirge kaum feststellbar ist, dass vielmehr hier andere Faktoren wirksam werden. Unsere gewonnenen empirischen Ergebnisse werden somit verwendet, um die Gültigkeit der Theorie der global-value-chains zu testen (und in ihrer globalen Gültigkeit zu widerlegen). Die Region wird abschließend charakterisiert als touristisches Zielgebiet, für welches die Prinzipien der global-value-chain offenbar erfolgreich außer Kraft gesetzt wurden mit einer Direktbuchung des touristischen Produkts durch den Touristen beim (Übernachtungs-)Anbieter im Zielgebiet.

Keywords: Tourism, cultural geography, thematic cartography, global value chain theory, Morocco, Anti-Atlas

1. Statement of problem

Great hope has been invested in recent decades in the positive impact of international tourism and its ability to help economically disadvantaged, structurally weak regions in so-called developing countries to upvalue and to bring sources of income to the inhabitants. Expectations were initially without much theoretical foundation but were instead rather ideological visions of tourism “by the rich in the lands of the poor.” As such, they were soon exposed as the wishful thinking of theoretical modernizers. The empirical reality did not match the noble goals of a “enabling a meeting of cultures” and “improving incomes in tourism destinations.”

Consequently, VORLAUFER (1996, 5) characterised this early phase of tourism to developing countries as full of euphoria and optimism, dating it to the period up until the 1970s. It was followed by a much more pessimistic view of international tourism’s influence, which ultimately give rise to a diametrically opposite attitude. The economic, cultural-social and ecological impact of tourism moved into the spotlight and was roundly deplored. This was the second phase of tourism to developing countries, and it lasted from roughly 1973 to the mid-1980s. The period is dominated by theoretical positions that saw neo-colonial tendencies in tourism and blamed it for the many deformations seen in the societies affected, grouping everything under the banner of dependency theories. VORLAUFER (1996, 5) characterises the phase with the words “sobering” and “criticism.” There is even a complete rejection of international tourism on ethical grounds.

Since the 1980s and 1990s, international tourism research has tended to avoid positing global theories (see BATAILLOU and SCHÉOU 2007; STEINER 2011). Instead, it has taken a pragmatic ap-

proach and has evaluated the effects (positive and negative, including unintentional ones) on the local population on a case-by-case basis. In France, this new trend has been provisionally labelled “marché touristique «patchwork»” (CUVELIER 1994, 80). It has been just over decade since a new theoretical position of “medium reach” began to explain the dependencies resulting from the power relationships between the various stakeholders according to which the international tourism market functions (SCHAMP 2007; BARHAM et al. 2007; LESSMEISTER 2008). This is the application to tourism in global value chain theory, which in itself is a highly logical and convincing set of arguments (see GEREFFI and KORZENIEWICZ 1994; its application for tourism: see CLANCY 1998; MOSEDALE 2006). In answer to the normative question regarding what (ideally increasing) share of the tourism product can be held by local stakeholders, global value chain theory offers the sobering insight that local actors are once again the weakest links in a chain that is controlled by major travel operators in Europe (and/or North America, Japan and Australia). And the theory indicates that the local actors cannot break out of this dependency relationship.

For example, we learn that the dominance of travel operators operating in the tourism market between Germany and Jordan is such that they can exert pressure on domestic agents in the destination country at any time. The goal they have in exploiting the power their domination gives them is “to reduce self-determination of local ‘producers’” (BARHAM et al. 2007, 175). Indeed, they tend to inhibit the growth of local service providers, as “they hinder local producers from acquiring new functions and thus upgrading” (BARHAM et al. 2007, 176). Incoming agencies in countries visited by international tourists try to escape the domineering behaviour of e.g. German tour operators by seeking “newly

emerging markets” (ibid. 177) which, after considerable effort, they manage to find (e.g. India, Russia, Hungary). These markets are less lucrative, however, and also demand other activities (less sightseeing, more beach and coastal tourism). In addition, the local actors are concentrated at the end (in the negative sense) of the value chain. The result is that “the total domestic value chain in Jordan has been affected by this shift in client markets” (BARHAM et al. 2007, 177).

In the case of trekking tourism in the mountains of Morocco, another empirical case study showed that the lion’s share of supply is controlled by a lead firm in Europe as part of a package programme. Competition forces prices down, narrowing the profit margin particularly for the local suppliers. This leads directly to a race to the bottom (LESSMEISTER 2008, 106–107). A few local suppliers, mainly guides, have tried to enter the market directly by founding their own agency, by offering a *gîte d’étape*, or by organising their own tours and seeking to acquire clients through contact with trekking clubs and associations abroad. Although these undertakings have cost considerable effort, they have been successful only in rare cases. In addition, the providers are on the margins of legality because those guides who also work for tour operators are contractually forbidden to offer privately organised tours (LESSMEISTER 2008, 101–102). First attempts have been made to attract clients via the Internet, but these have usually failed after a short time due to the high entry barriers.

Research on international tourism using the theoretical concept of the global value chain has thus again become a complex of arguments that describes the dependence of the last links in the value chain, namely the local providers. Global value chain theory draws a rather pessimistic picture of the room for manoeuvre available to these local actors. Does this mean that hopes, beginning to grow in niches such as ethno-tourism (e.g. ROTHFUSS 2004; BARTHA 2006; SCHOLZE 2009; SIEHL 2012), that international tourism could find a way to function without being dominated by a few powerful organisations in the tourists’ home countries have yet again been dashed and revealed as an illusion? Are “local” tourist activities doomed to failure by the inescapable mechanisms described by global value chain theory, no matter how dedicated and high-quality their organisation? The empirically-based answer to this question will form the core of the second part (Chapt. 3) of this paper. Beforehand, however, the region studied will be introduced and described (Chapt. 2).

2 Description of the Anti-Atlas today as a tourism region

If the global value chain model is, as suspected, of only limited use in characterising an existing tourism product, this could be because international framework conditions have changed generally and the Anti-Atlas is merely one of the first regions in which this change can be seen. Alternatively, it could also be because the Anti-Atlas is a region dominated by specific conditions that either are not present elsewhere or do not appear elsewhere in sufficient concentration to have an effect. Given the scope of this paper, the question of which of these two interpretations applies must remain unanswered.

2.1 Links to global information systems

During our research on tourism in rural areas in the High Atlas of southern Morocco in the 1990s (AÏT HAMZA and POPP 2000) and in the Djebel Saghro around the year 2000 (AÏT HAMZA and POPP 2004), we observed that only a few villages were connected to the national grid. Telephone connections (landlines) and tracks passable with vehicles were absolute exceptions, to say nothing of tarred roads, and there were more areas without than with mobile phone reception. The Anti-Atlas today is very different. Almost every village has electricity and mobile phone reception, bringing a new quality of integration into national and international communication networks for local inhabitants. Almost every household possesses a mobile telephone, and this means that tourism providers in the Anti-Atlas can reliably be contacted by phone or via the Internet.

The last two decades have seen the state (supported by initiatives in local communities) build numerous good tarred roads and construct access roads to villages, often as concrete tracks. Since then, travellers have been able to reach the most distant corners of the Anti-Atlas in an ordinary car, without needing a 4 x 4 vehicle or truck. The dynamism with which this construction process has gone forward, and which had been sorely lacking beforehand, may have something to do with the high proportion of people from the Anti-Atlas living in Morocco’s towns and cities or even in Europe (particularly France) as temporary or permanent migrant workers. Their economic and political influence seem to have contributed to making the network of asphalt roads in the Anti-Atlas today surprisingly comprehensive. Driving into the mountains is no longer the adventure it once was.

2.2 The state's perception and promotion of the Anti-Atlas as a tourism destination

The Moroccan state in general gives a high value to international tourism, but less so to tourism in rural areas. For example, the Anti-Atlas plays only a minor role in tourism advertising; the main focus is on beach and coastal tourism in Agadir and recently in Essaouira, as well as on urban tourism in the imperial cities, particularly Marrakech. The only exception is trekking in the High Atlas, started as part of a Franco-Moroccan development project in the 1990s (see AIT HAMZA and POPP 2000).

Where information on the Anti-Atlas is published by the government, it tends to be incompetently if not carelessly produced and superficial, even if the material is printed on high-gloss paper. An example here is the coloured, bi-lingual (French and English) map claiming to give an overview of the Anti-Atlas (see Fig. 1). In fact, it is less a map and more a diagrammatic sketch. It shows fewer tarred roads (labelled as regional roads, in green) than other road maps, and the administrative region of Chtouka-Aït Baha is highlighted for reasons unknown. The mountainous character of the region is not shown at all: It is only the four olive-green islands, showing the area in which the argan tree grows, that give an indirect clue. A palm alley is shown from Tafraoute to Igherm although there are in reality no palms there at all. The cartographic symbol for "Kasbah" or "Ksar" shown around Tafraoute is misleading, as this kind of settlement does not exist in the Anti-Atlas at all. The "Kasbah of Tizourgane", which lies on the Aït Baha-Tafraoute road, is shown much further west. Tidi, clearly highlighted as a marabout, is regionally relatively unimportant and generally unknown. Several locations have been marked with "mausoleum," although it is hard to avoid the impression that this is primarily to fill out the empty space. Aït Baha, Tafraoute und Anezi are the only centres shown on the map. Specific cultural features mentioned include rock art near Tafraoute and Ukas (the latter accessible only via a challenging track), Chapeau Napoleon (granite formation) and the Aït Mansour gorge. A symbol for "climbing" is included in the legend, but (misleadingly) it does not appear on the map at all.

A sketch like this, which contains more misinformation than information should never have been printed. The truly attractive tourist features of the Anti-Atlas do not appear at all. The state's tourism policy towards the region has been a hindrance rather than a help.

2.3 The Anti-Atlas as an unknown part of Morocco among Moroccans and non-Moroccans

To be fair, it should be said that the atrocious tourist map published by the Conseil Régional du Tourisme can only partially be blamed on that institution. The reason for this is that, astonishingly, the Anti-Atlas region is largely as unknown in Morocco itself as it is in Europe. Even educated urban Moroccans, for example, know very little about the Anti-Atlas and are of the opinion that there are hardly any cultural highlights in the region. The consequence of this lack of awareness is, of course, that the mountains' suitability for cultural tourism is unrecognised.

The lack of recognition for the Anti-Atlas Mountains dates back to the early years of the French protectorate. The mountain range and its eastern extension the Djebel Saghro were the home of the ethnic groups who resisted the protectorate until the 1930s, with the result that fighting was a feature of everyday life, making visits by civilians or tourists impossible (see GANDINI and AHALFI 2013). This lack of intrusion is reflected in the fashion that began around 1900 and lasted into the 1930s all over the Maghreb, and also in Morocco, for postcards showing black-and-white photographs of a wide range of local motives. European military personnel and civilian settlers liked to send these back to their families and friends in Europe, making a major contribution in the early years of the 20th century to spreading an awareness of almost all of Morocco, even if the main focus of the postcards sent was on the exotic. The publicity effect must have been enormous, similar to that seen in southern Tunisia (POPP and KASSAH 2010, 120, 156, 166–167, 298–299, 317–319). There were, however, no postcards of the Anti-Atlas available, with the result that the region remained unknown.

This lack of recognition continued after the "pacification," through the later years of the French protectorate and continues until today, as can be seen in the omission of the Anti-Atlas in today's travel guides. A few examples will here suffice to illustrate the point (see POPP et al. 2011, 38–41).

- When the Guide bleu du Maroc of 1950 (7th edition) appeared at the end of the protectorate, there was not a single tarred road leading into the Anti-Atlas mountains. Of its 519 pages, a mere 4 are given over to the mountains. Only three routes are classified as passable by vehicles

and recommended. A single *agadir* (of Tasguent) is mentioned, but the reader does not discover what an *agadir* is.

- The Guide de Tourisme Michelin: Maroc from 1997, almost fifty years later, devotes 3 of its 322 pages to the Anti-Atlas. Nothing has changed as far as the sketchy treatment of the region is concerned. By way of comparison, the city of Oujda receives 6 pages, Safi 4 pages and Taza 3. Not a single example of an *agadir* is detailed, although they are such an important feature of the cultural landscape.
- The Guide du Routard Maroc 1998/99, normally seen as a particularly reliable guide, is no exception in this group: 20 of the 430 pages deal with the Anti-Atlas, and several of the pages include

areas that in fact belong to the Djebel Siroua and the Central High Atlas. Three *agadirs* are mentioned; the unknown one at Talâat Yissi, the one at Amtoudi (although the name is not mentioned) and the one at Timoulay-n-Ouamloukt. This means that three objects on the southern edge of the mountains are included, but once again there is no explanation of what an *agadir* actually is.

- The guide *Agadir, Marrakech und Südmarokko* (2nd edition 2000) in German by ERIKA DARR in the "Reise Know-how" series is much more differentiated in the information it presents. A total of 50 of its 500 pages (around a tenth, in other words) tell the reader more about the region and include a competent explanation of what an *agadir* is, the reasons for its existence and the vari-



Fig. 1: Official Tourist map of the Souss-Massa region (section) with its very superficial information, which will not help the visitor to identify any important aspects. Source: Carte touristique/tourist map Région Souss-Massa-Drâa (n.y.), ed. by Conseil Régional du Tourisme d'Agadir Souss-Massa-Drâa

ous forms it takes. Agadir Tasguent and Agadir Id Aïssa in Amtoudi, the two perhaps most important and best known of these fortress-storehouses, are described in more detail.

- The final guide to be mentioned here is the English edition of Morocco (2009) in the “Lonely Planet” series. Of its 538 pages, 42 give information about “The Souss, Anti-Atlas & Western Sahara.” Only 6 of the pages deal with the Anti-Atlas under the headings of Tafraoute, Around Tafraoute, Ameln Valley & Djebel Lekst, and Tata. After the technical aspects relating to tourist infrastructure have been described, there is little space for specific detail.

The rather sobering result of this survey is that the Anti-Atlas, with a few author-specific variations, is still largely ignored by the tourism industry. Ultimately, the profile of the region, with its origins in the resistance by ethnic groups during the colonial era, continues to be low and its qualities as a tourist destination are largely unknown.

2.4 The unusually large but largely unexploited tourist potential of the Anti-Atlas

Contrary to popular understanding, the Anti-Atlas has an unusually wide range of natural and cultural resources to offer tourists. These are based on the region’s landscape, culture and its natural and cultural heritage (see BUTLER 1996; BECKER 1999; TIMOTHY 1999; GRAHAM et al. 2000; HARGROVE 2002; MCKERCHER and DU CROS 2002; SMITH 2003). There are geological formations dating back to the Palaeozoic and Precambrian eras, particularly the picturesque granite formations around Tafraoute; large argan groves; largely unknown but nonetheless remarkable natural features (e.g. natural bridges, a travertine plateau, see also photos 11 and 12 on the tourist map); a heavily terraced cultural landscape with almond trees and barely fields; traditional houses with Berber-influenced details in the area around Tafraoute; fortress-storehouses with cisterns, watch towers, grain stores, threshing floors and other remnants of a traditional agrarian society; the Berber people with their rich culture (e.g. jewellery, carpets, documents carved in wood); a long-standing Jewish population with cemeteries and synagogues; rock art from previous centuries.

The lack of tourist interest in the Anti-Atlas by no means signifies a lack of potential in the region. The opposite is the case; it is no exaggeration to say

that the Anti-Atlas Mountains are a neglected and hidden tourism jewel.

2.5 First creative and successful attempts to attract tourists from abroad

The Anti-Atlas has in fact been attracting a modest level of tourism for some time now, and the necessary infrastructure is in place. The oldest tourist centre is the town of Tafraoute with the oldest overnight accommodation, a hostel (*gîte d'étape*) dating from the 1940s. This was upgraded to a hotel in 1960 and still has a high classification (4 stars) today (see also the text box in the tourist map on the development of tourism). In addition, camper van tourism has developed noticeably, without any real support from the state, in Tafraoute itself (three camping sites) and in Amtoudi on the southern edge of the Anti-Atlas. Initiatives to set up an infrastructure of tourist attractions have so far all grown out the region itself without any capital flowing in from outside the region, let alone from abroad. Where non-Moroccans (mostly French nationals) are involved in the tourism product, they are generally expatriates who have chosen to live in the Anti-Atlas and are active as much as because of their emotional attachment to the region and its people as for economic reasons. There is already even a beauty farm offering argan oil treatments. Several mountain bike rental businesses report strong demand, and the mountains have become something of an insiders’ tip among rock climbers. The visitors are generally accepted, which is reflected in the fact that most of them have been more than once.

2.6 A modest academic contribution to the development of tourist functions

At such an early stage in the development of tourism, when the first tentative and uncoordinated, if promising, steps are being taken towards setting up eco, cultural and heritage tourism, it can be of some modest assistance if the process is supported by the publication and distribution of a differentiated tourist map (see also POPP 2004). The accompanying tourist map has been published in three languages (English, French, German) and is intended as a practically useful by-product of the bilateral research project. It could have been issued by the authorities but this has not happened. TIMOTHY (2011, 263) describes this kind of small-scale “bottom-up”

development in sustainable tourism in rural areas as the PIC model (participatory, incremental, collaborative).

2.7 Approach to making the thematic map

There follows a concise summary of the method used in making the map. The large number of visits to the Anti-Atlas made between 2009 and 2012 were primarily dedicated to research for a project on the fortress-storehouses or *agadirs* in the region and their suitability as attractions for heritage tourism (POPP et al. 2011), and not to research for this map. However, the travelling brought a familiarity with the mountains that undoubtedly assisted us in the map making.

The basis for the map is the official Moroccan 1:100,000 map from the 1960s onto which we projected all the information that appeared to us to be of use to the individual tourist in the region. It should be emphasised that the map does not take information published elsewhere and simply compile it into a new map; instead, all the information included was collected empirically by us in the field. This means that much of the information in the map is either unknown or little known. The criteria used for selecting the information and its cartographic realisation can be divided into the following categories based on the (probable) interests and expectations of cultural tourists (see DROST 1996; APOSTOLAKIS 2003; LAZZAROTTI 2003): (1) Technical transport infrastructure (network of tarred roads, fuel stations). (2) Supply infrastructure (hotels/hostels, restaurants/café, shops and local authorities). For the five centres in the Anti-Atlas, the information was also displayed on large-scale local maps as functional maps. The details of individual hotels and hostels were gathered in personal, unstructured interviews with their operators. (3) Localisation and short description of the most important natural and cultural heritage objects including a photograph of each. (4) Background information of interest to culturally interested tourists (in text boxes, e.g. argan groves, Berber culture). The collection of the information depicted was exhaustive for the area, with the result that, at the time of completion (end of 2012), the map was absolutely reliable. Although the map was not made strictly according to a theory, therefore, it was still not without a theoretical base: It systematically incorporates all the aspects that researchers largely agree that cultural tourists demand (see DREYER 2000; SMITH 2003; STEINECKE 2007;

TIMOTHY 2011). As an empirical survey, the map is a synthesis and a descriptive inventory; it is dedicated to a practical purpose.

3 A “bottom-up approach” taking into account new circumstances in international tourism in peripheral regions

In our research in recent years, both in our examinations of the theoretical components of global value chain theory and in our empirical research on international tourism in Morocco, we have repeatedly seen that the postulates of the theory cannot be denied. Indeed, they can be confirmed empirically. Our research has demonstrated that the inclusion of local stakeholders is essential for some tourism products and that they take on (or at least appear to) a central role here. However, we have also seen that, while they may be irreplaceable in a functional role as actors, local stakeholders are not irreplaceable as individuals as far as the European controlling powers in the value chain in Europe are concerned. Indeed, these stakeholders are at the end of the chain and, should they question the rules of how the product is organised, they can easily be replaced by other actors with the same qualifications. The result is that the power relationships remain unchanged. This applies to e.g. guides, muleteers, and hotel and hostel operators in trekking tourism (LESSMEISTER and POPP 2004; LESSMEISTER 2006), and the effect can also be seen in ethno-tourism amongst folklore groups, locals showing their homes or tents or offering accommodation (BARTHA 2006).

In trekking tourism, we also observed that the share of the package price going to the local population is slightly higher than for other tourist products, amounting to around 8% of the total holiday cost paid by the tourist (LESSMEISTER and POPP 2004). This is probably connected to the structural indispensability of the local actors. Ultimately, however, the local functions are minor wheels in the tourism machine that, despite their importance for the local stakeholders, in fact have little meaning for the mechanism as a whole.

That said, our recent research on cultural heritage and heritage tourism in the Anti-Atlas has revealed some observations, yet to be systematised, which cannot be explained by global value chain theory – and which nonetheless exist. The authors who use global value chain theory in their argumentation emphasize that their findings are valid only for package tourism, meaning group tourism or standardised trips (SCHAMP

2007; BARHAM et al. 2007). They also claim that the lion's share of international tourism to developing countries belongs to this category, with the result that the approach can ultimately ignore the remaining individual tourism. In the Anti-Atlas Mountains, however, we have found an example of a region in which individual tourists make up a high, if not the dominant, proportion of visitors.

In our research project conducted over the past three years on the fortress-storehouses found in the Anti-Atlas, their deterioration, reinterpretation as cultural heritage and provisional re-use in heritage tourism (POPP et al. 2011), we so often observed a discrepancy between the tourist phenomena in the region and the global value chain hypothesis that we intend to collect and provisionally describe our findings here. This implies that global value chain theory is disproved in the study area. However, to avoid misunderstanding, we do not intend to develop a new theoretical construct; instead, we would like to discuss how far the special circumstances for international tourism in the Anti-Atlas may represent an opportunity for a new tourism product that not only functions differently to traditional products but perhaps will also permit local actors to attract tourist business without being trapped in a hierarchical network of dependency.

In methodological terms, our empirical conclusions are based on qualitative interviews with hotel and hostel operators in the Anti-Atlas and on their websites and homepages. The main trends in the conclusions follow.

We observed that there was hardly any evidence of organised groups travelling to the Anti-Atlas from Europe or North America. It is only in Tafraoute, the main centre, that two hotels (Hotel Les Amandiers, Hotel Salama) can be found which occasionally accommodate tourist groups. Most hoteliers report that their guests, usually individual travellers or small groups, either arrive without reservations or book via email. Telephone bookings are rarer. The hotel operators often say that a significant proportion of their guests are not first-time visitors, but can be said to be regulars to a certain degree. This can be seen as an indicator of the guests' satisfaction.

The hoteliers are aware that an internet connection with an email address and even a homepage is important and even essential for their dealings with their clientele. In consequence, most of the hoteliers have a homepage, particularly the classified hotels and guest houses (*maisons d'hôtes*). This last category seems to be particularly popular among international tourists. Some operators are already trying to put

their websites online not just in French but also in English and even in German or Spanish. However, a shortage of language skills means that French is still clearly the dominant language.

These findings show that the majority of business communications between hoteliers and tourists takes place directly, generally via electronic media. This means that the conditions of the global value chain are not met in the case under discussion.

4 Current circumstances and tendencies in the evolution of creative individual tourism in the Anti-Atlas

It has been seen that several factors exist which may result in individual tourists from outside Morocco visiting the Anti-Atlas. These factors are probably also well-suited to expanding and developing this visitor structure in the near future.

(a) Agadir, the popular centre of beach and coast tourism, is only 100 km or 2 hours' drive from the Anti-Atlas. BARTHA (2006) showed the inaccuracy of the clichéd image of beach tourists in Agadir as uninterested in cultural information and activities. Tourists in Agadir who wish to have a break from their resort on the coast can already choose to go on day trips into the Anti-Atlas; these are generally undertaken in all-wheel-drive vehicles, even though the roads are more than good enough for a bus. However, the all-wheel-drive vehicles contribute to the sense of adventure that many are looking for. These excursions have highly standardised routes, generally following a circuit from Agadir – Tiznit – Kerdous Pass – Tafraoute – Kasbah Tizourgane – Aït Baha – Biougra – Agadir. There are several stops for photography along this very scenic route but the explanations and information given by the drivers tend to be rather superficial. The tour includes an extensive and opulent lunch in Tafraoute, often accompanied by folklore music and dancing by hired groups. The tour then returns to Agadir with a short stop in the Kasbah in Tizourgane, sometimes as a coffee break. The excursion involves considerable amounts of driving, often at relatively high speed, with the result that the participants receive an initial but fleeting and atypical impression of the Anti-Atlas without having visited a single example of the more than 100 imposing fortress-storehouses in the region.

Individual tourists who expand their beach holiday in Agadir by hiring a car (very reasonably priced and reliable in Morocco) and going on a tour through the Anti-Atlas for several days have a much greater

chance of gaining a more differentiated insight into the landscape and culture of the region.

(b) It is, of course, easy to object that foreign tourists generally do not know the region they are visiting at all, and this will make them insecure and not give them the confidence to organise a visit to the region on their own. The objection is justified if the tourists have only a 1:1,000,000 map e.g. the well-known Michelin road map, or if they have the British tourist 1:160,000 map of Taroudant. These maps, even in the most recent editions (Carte Michelin 2009, EWP-WCP Morocco Topographical Map 1:160,000, sheet Taroudant 2009), only show a very much reduced version of the existing network of tarred roads. If tourists use a very detailed and reliable 1:150,000 map (such as the one we present) together with additional information available in English, French and German, they will be in a position to travel throughout the region without fear of getting lost. It is exactly this quality that our "Tourist Map of the Western Anti-Atlas" possesses. It also shows all fuel stations as well as descriptions of accommodation and particularly noteworthy points of interest.

(c) The technical information offered by the map goes far beyond the correct representation of the network of tarred roads. The completeness of the inventory of accommodation at the time of publication (2013) has already been mentioned. The map not only locates the hotels and hostels accurately and gives additional information on them (number of beds and rooms, showering facilities, bar service), it also groups them in 1:5,500 thematic maps for the centres in the Anti-Atlas. The town maps for Tafraoute, Ait Baha, Igheem, Ifrane de l'Anti-Atlas and Akka also include other functions that are relevant for tourists, such as ATM machines, post offices, cafes and restaurants, and boutiques offering tourist products.

Potential tourists should feel they can trust the map completely. Research on tourism in peripheral regions has repeatedly shown that trust is one of the keys to success (see GUNDOLF et al. 2007, 342). But how can a map be trustworthy? Trust is engendered by meticulous attention to detail and careful analysis followed by accurate presentation in the map as the result of a deep knowledge of the region on our part, so that the user swiftly realises that the map is reliable in use. On the other hand, the trust can be based on the recognition that we have not favoured any particular group. We do not have any particular interests and see ourselves as a neutral instance passing on tourism-related information, as a kind of stakeholder for the interests of tourism in rural areas.

(d) Even today and regardless of author, publisher or language, guidebooks hardly give any expert information on the Anti-Atlas¹⁾. For example and as already mentioned, the majority of tourist guides fail to mention the fortress-storehouses in the region, deal with them only superficially or do not explain what an *agadir* is. For this reason, it seemed necessary to include a kind of cultural introduction to the most important aspects of the region on the reverse of the map. Aside from practical tips on travelling in the Anti-Atlas and on how to use the map, we have also given brief factual details on the following: (a) Argan forests and their use – argan oil and its international demand – biosphere reserve; (b) the Anti-Atlas as a unique landscape with its terraces, cisterns, oases, almond trees, argan groves and traditional settlements; (c) the granite landscape around Tafraoute; (d) fortress storehouses (*agadirs*) – the main cultural attraction of the Anti-Atlas; (e) *Amalou* – a sweet delicacy of the Anti-Atlas; (f) the weekly rural markets (*souks*) of the Anti-Atlas; (g) the Berbers (*Imazighen*); (h) the Jews of the Anti-Atlas, (i) *marabouts*, *moussems* and festivals, above all Sidi Ahmed ou Moussa in the Tazeroualt; (k) the development of tourism in the Anti-Atlas.

(e) The accommodation on offer to tourists so far has generally been unsuited for large groups because local providers have had insufficient capacity. The size of the hotel or hostel has a direct relationship to the type of accommodation offered and in the Anti-Atlas family-owned, guest-house-style accommodation is far more common than in other parts of Morocco. The accommodation can often not be compared with usual standards but is often very lovingly decorated with local ornaments and details (see BURGER 2007). Food is often prepared and served in dishes typical of the region, so that the atmosphere is served up at the same time. The majority of such cases are in what are locally called *maisons d'hôte* (guest houses), which bear a strong resemblance to the kind of *riad*s that are very popular in the imperial cities of Morocco and Essaouira (see ESCHER and PETERMANN 2009; ROSS et al. 2002). They are characterised by the fact that they are run by partners (usually a couple), one of whom is European and the other Moroccan. This bi-culturalism has the significant advantage that the guest house can root itself firmly in the Moroccan context as far as the purchase of food, its preparation and staffing is concerned, and at same time the

¹⁾ A laudable exception is the recently published book of JACQUES GANDINI "L'Anti-Atlas" in the series "Guides 4 x 4 pistes du Maroc, vol. 7" (GANDINI and AHALFI 2013).

operators can be sure that what they offer does not completely fail to meet the expectations and tastes of the average European. This understanding of the tourists' background probably plays an important role in creating the high levels of satisfaction observed.

(f) In terms of quantity, the range of accommodation on offer is already surprisingly high. There are naturally variations as far as type, quality and price are concerned. With our map, we have attempted to give visitors some assistance by listing all the accommodation without excessively evaluating or excluding. Potential visitors can request more information by email or get an idea of the accommodation and its price via the Internet and make a reservation while still at home.

(g) An additional niche product has developed in the Anti-Atlas in the last ten years, based on the region's extremely high potential for climbing tourism in and around Djebel El Kest (see DAVIES 2004; BROADBENT 2010). Rock climbers, the great majority of whom are British, generally stay in Tafraoute or in the Ameln Valley at the foot of the Djebel El Kest. They are an especially individualistic group for whom any kind of group or package tour is uninteresting. In that sense, climbers form a core group early in the development of individual tourism in the region.

5 The Anti-Atlas: Prototype of a new organisation form in international tourism by-passing intermediate levels?

A range of tourist products has developed in the Anti-Atlas Mountains without any significant support from the state or intervention by large international tour operators, and a modest demand has grown up that can be called a success. We have attempted to put academic methods and results to use for a practical purpose by publishing and making available a reliable tourist map of the region with the goal, at least partially ideologically motivated, of supporting and moving the process along. The special characteristic of this process is that it bypasses the usual hierarchical levels, with European tourists generally planning their own stay and booking directly with the local service provider.

The process can only remain successful in the medium term, however, if the conditions and structures that differ from traditional tourist products do in fact apply. It was seen that tourists already tend to book their accommodation in the Anti-Atlas direct by Internet from Europe. This requires a certain

amount of confidence, which is perhaps justified by the presence of a European partner on the Moroccan side and by the fact that many of the tourists have already visited the area and know what they are letting themselves in for.

Although this aspect is so far only an empirically unconfirmed supposition, it is likely also the charm of the very different tourist experience in the Anti-Atlas that attracts individual tourists: The reserved and very correct manner of the local population, the beautiful landscape, the possibility of exploring the region by car, by mountain bike or on foot, the attractions of local aspects such as argan oil, rock labyrinths, sheltered oases with date palms and the impressive, largely intact *agadirs* – and all this without hustle and bustle and crowds of tourists.

Our provisional results must, of course, be given a theoretical background and foundation in the next phase of research. At the moment, we can only observe that, in the region we are studying, the principles of global chain theory are not (or are no longer) sufficiently precise or accurate. This shows that the theory can make no claims to universal validity, and that critical review is justified.

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