

The importance of infrastructure in developing the tourism sector in Algeria.

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Abstract

This study sought to highlight the importance of infrastructure development as the fundamental pillar upon which various economic sectors depend, including the tourism sector, which is considered one of the most promising alternatives to the hydrocarbon sector in Algeria. The study presented and analyzed the main indicators of tourism infrastructure in Algeria over different periods extending from 1995 to 2024. It also included a comparative analysis of these indicators with their counterparts in several neighboring countries.

The findings revealed that Algeria does not devote sufficient attention to either the infrastructure sector or the tourism sector, despite their significant role in promoting economic development. The results also showed that Algeria ranks relatively low in several global indicators related to tourism and infrastructure. Furthermore, the comparison with neighboring countries demonstrated that the performance of Algeria's tourism sector remains limited and does not reflect the country's abundant resources and potential.

Keywords: Infrastructure, Tourism Sector, Economic Development.

Introduction

Today, tourism has become one of the economic sectors that attracts the greatest attention from countries around the world. It is often referred to as "blue gold" and the "smokeless industry" because of its effective contribution to supporting gross domestic product (GDP) and stimulating economic activity. Tourism also enables the efficient utilization of tourism resources and attractions in a manner that generates substantial economic returns, particularly for countries with limited income diversification. This is especially relevant to Algeria, which relies heavily on hydrocarbon revenues, a resource that can no longer be considered the sole guarantor of economic stability. The rapid growth experienced by the tourism sector has made it one of the fastest-developing industries worldwide. Consequently, many countries have entered into competition to improve their rankings in tourism competitiveness indicators. These indicators are generally based on three main pillars: the legal and regulatory framework governing tourism, natural, cultural, and human resources, and infrastructure and the business environment.

Algeria possesses diverse natural, historical, and cultural assets that qualify it to become a distinguished tourist destination. This necessitates the efficient exploitation of these resources to achieve the highest possible economic returns. However, tourism development in Algeria has remained a persistent challenge for many years and requires the adoption of effective and

comprehensive solutions capable of transforming the sector into a genuine source of development and revenue generation.

Among the most important measures that can be undertaken is the improvement and rehabilitation of infrastructure in numerous tourist areas suffering from deterioration due to neglect, in addition to the implementation of new strategic projects aimed at enhancing the quality of national infrastructure. Such measures would positively impact not only the tourism sector but also various other economic sectors.

Research Problem

Achieving economic development requires a continuous search for the most effective means and mechanisms to support and strengthen it. Since investment is one of the most significant indicators reflecting the actual level of attention devoted to any economic activity, questions have arisen regarding the extent to which Algeria allocates the financial resources necessary for infrastructure development in a way that contributes to the advancement and growth of the tourism sector. Accordingly, the central research question of this study is:

To what extent is infrastructure important for the development of the tourism sector in Algeria?

To address this question, the study is divided into two main parts as follows:

Part One: Examines the concept of infrastructure, the concept of the tourism industry, and the concept of tourism infrastructure.

Part Two: Focuses on Algerian government infrastructure projects within development programs, tourism indicators, the tourism development plan, and infrastructure indicators related to the tourism sector.

Significance of the Study

The importance of this study stems from the growing significance of economic diversification for countries that depend primarily on limited resources, particularly oil-producing countries such as Algeria. Economic diversification represents a strategic and essential option that can contribute to supporting economic development and ensuring its sustainability. Given the increasing importance of tourism as one of the most viable alternatives to the hydrocarbon sector, especially considering Algeria's rich natural, historical, and cultural resources, the development of this sector has become an indispensable economic and social necessity.

From this perspective, the importance of promoting the tourism industry lies in providing the fundamental requirements necessary for its success, foremost among them the development of tourism infrastructure, which constitutes the foundation upon which the growth of various economic sectors depends. Strengthening infrastructure contributes to improving tourism services and offerings, facilitating tourist mobility, and meeting visitors' diverse needs. This, in turn, positively affects the growth of the tourism sector and enhances the country's economic and social conditions.

1. The Theoretical Framework of the Study

1.1. The Concept of Infrastructure

Although the term infrastructure is relatively recent, its components are an integral part of our daily lives through our continuous use of facilities such as roads, airports, telephone and internet networks, and many other essential services.

1.1.1 Definition of Infrastructure

There is no single universally accepted definition of infrastructure, as most definitions focus primarily on its various components.

Infrastructure refers to the set of fundamental facilities that are essential for the life and development of societies. It is also crucial for the functioning of organizations, as it supports them and enables them to achieve the objectives for which they were established (Bernier, 2010)

Infrastructure can also be defined as the structures that support human activities, encompassing physical, social, ecological, economic, and technological systems, such as transportation, energy production and distribution, communication networks, water resource management, waste management, and all facilities that support both urban and rural communities, including sustainable resource development and environmental protection (Fulmer, 2009)

1.1.2 The Importance of Investing in Infrastructure

Infrastructure constitutes the foundation upon which the economy of any country is built, given its significant role in improving the performance and revenues of all other sectors. The importance of infrastructure investment can be summarized as follows: (Croce, 2011)

- Providing the goods and services necessary for economic activity at the national level.
- Promoting prosperity, economic growth, and improved quality of life, including social, health, and environmental well-being.
- Facilitating commercial transactions, diversifying employment opportunities, enhancing market competitiveness, increasing the efficiency of economic activities, and encouraging economic diversification.

Furthermore, investment in infrastructure contributes to the: (Satour & Ben Zarour, 2017)

- Providing adequate infrastructure to facilitate economic activities. Expanding productive capacity, diversifying market products, and achieving economic growth.
- Increasing national income and raising per capita income, thereby improving citizens' living standards.
- Enhancing capital formation rates and contributing to a balanced balance of payments.
- Meeting most individual and collective needs, creating new employment opportunities, increasing individual and national income, and consequently reducing unemployment rates.
- Encouraging foreign investment.

1.2. The Concept of the Tourism Industry

The tourism industry is considered one of the largest and most important industries to which most countries devote considerable attention. It is widely regarded as a sector that contributes significantly to economic development while fostering social progress and prosperity.

1.2.1 Definition of the Tourism Industry

There is no single precise definition of the tourism industry. However, it may be described as an industry comprising both public and private organizations involved in the development, production, and marketing of goods and services aimed at satisfying tourists' needs and enhancing their well-being (العابد و لعراف، 2012)

1.2.2 Foundations of the Tourism Industry

The tourism industry is fundamentally based on the tourism supply provided by both the public and private sectors. Its main components include (العابد و لعراف، 2012)

A. Raw Material: This includes tourism attractions and resources such as natural assets (mountains, deserts, etc.), cultural and historical assets (archaeological sites, traditional crafts, and artistic industries), as well as other elements not directly related to tourism, such as hosting the Olympic Games, exhibitions, and festivals, which can be utilized as tourism attraction factors.

B. Capital: As a sector that requires high-quality services reflecting the image of the country to foreign visitors, tourism depends on substantial capital investments to finance its projects and infrastructure.

C. Labor: No industry can succeed without a qualified workforce. This is particularly true for tourism, which relies heavily on the quality of services provided by personnel working in tourism facilities and establishments.

D. Promotional Advertising: The effective promotion of tourist destinations through high-quality advertising campaigns plays a vital role in showcasing a country's tourism assets and attracting visitors.

E. Infrastructure: No sector can achieve success without the availability of adequate and modern infrastructure. Infrastructure is therefore a fundamental pillar of tourism development and constitutes the central focus of the present study.

1.3. Tourism Infrastructure

1.3.1. Definition of Tourism Infrastructure

Tourism infrastructure constitutes the primary foundation for the development of the tourism sector and serves as the starting point through which destinations can capitalize on their tourism attractions. The significance of tourism infrastructure lies in its ability to enhance the efficiency of producing and delivering tourism services and, in many cases, to increase the supply of these services (Collins International, 2018):

1.3.2. Components of Tourism Infrastructure

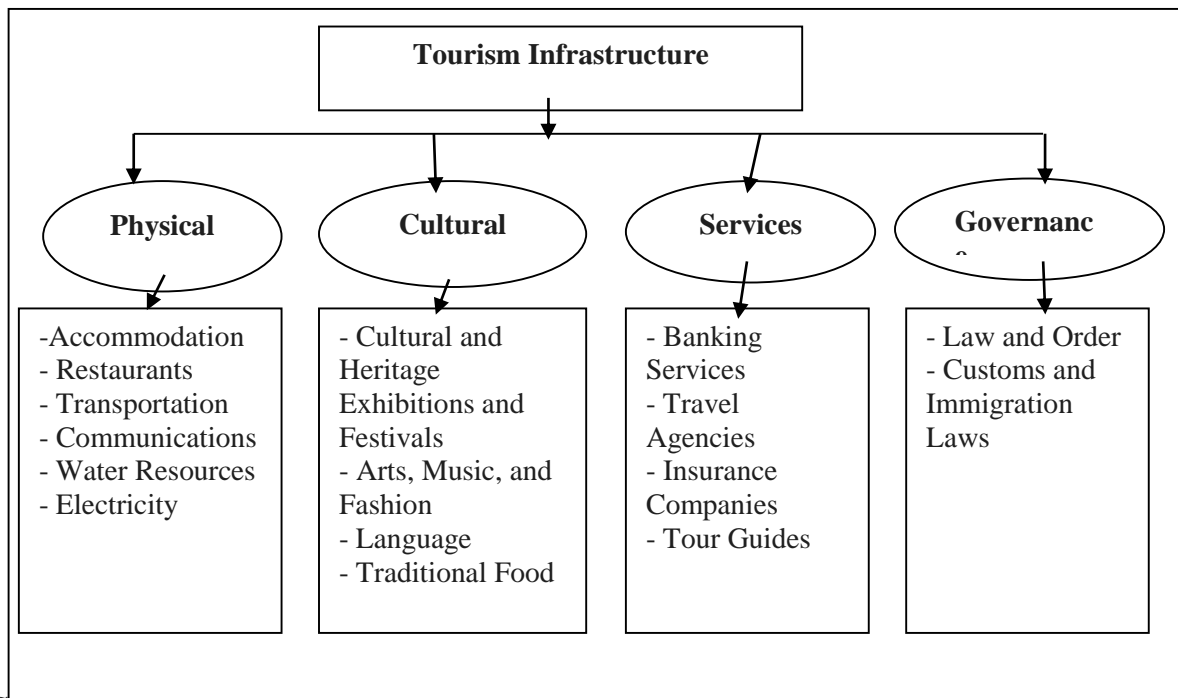
Tourism infrastructure consists of several elements that represent the main pillars for the development and advancement of the tourism sector, including the following (شيباد ، 2014):

- Tourist attractions, which include natural attractions such as forests, wildlife and nature reserves, waterfalls, and parks, as well as man-made attractions such as recreational parks, museums, and historical archaeological sites.
- Transportation infrastructure in all its forms—land, maritime, and air transport. It is considered one of the most important drivers of tourism development in any country, as tourists cannot visit destinations without diverse and well-developed transportation facilities that facilitate mobility between different regions.
- Accommodation and lodging facilities, primarily hotels. The greater their number, diversity of services, and geographical distribution, the more they contribute to tourism development and promotion. Furnished apartments available for rent also play an important role.
- Supporting facilities and services of all kinds, including tourism advertising and promotion, tourism administration, banking services, and financial facilities that facilitate deposit and withdrawal transactions for foreign visitors.
- Other infrastructure services, such as the availability of safe drinking water, reliable electricity supply, and modern communication technologies and wireless networks.
- Institutional components, including the enactment of legislation and regulations, the establishment of organizational structures, incentives for investment in the tourism sector, and programs for the education and training of tourism personnel.
- Various services, such as tourist information centers, travel and tourism agencies, centers for the production and sale of traditional and handicraft products, and tourist guides.

In addition, there is another element that interacts with all the aforementioned components: human resources and qualified personnel, which are essential for the effective functioning and sustainability of tourism infrastructure.

The following figure summarizes the main interrelated components that constitute tourism infrastructure:

Figure (01): Main Interrelated Components of Tourism Infrastructure.



Source: Comms International, *Tourism Infrastructure, Research Study, Middle East and North Africa / Hotels, Arabian Travel Market Series*, April 2018, p. 02, available for download at:

<http://www.shamalcomms.com/sites/default/files/ATM%20Series%20Tourism%20Infrastructure%20v2%20-%20Arabic.pdf> (accessed on 05/05/2025).

2. The Applied Aspect

2.1. Infrastructure Investment in Algeria

In its efforts to support economic development, encourage foreign investment, and stimulate productive sectors such as tourism, Algeria adopted an expansionary fiscal policy at the beginning of the third millennium through the implementation of a series of development programs. Approximately 40% of the financial allocations of these programs were devoted to infrastructure projects. These programs include the following (بابا و نسمن ، 2016):

2.1.1. Economic Recovery Support Program (2001–2004)

This program was introduced within the framework of Algeria's fiscal policy, which relied on expanding public expenditure following the improvement of the country's financial situation, with the aim of revitalizing the national economy. A financial envelope of 525 billion DZD (7 billion USD) was allocated to the program, a substantial portion of which was directed toward infrastructure development as follows:

- Educational infrastructure: 67.78 billion DZD allocated to the sectors of education, vocational training, higher education, and scientific research. Administrative, social, and cultural infrastructure: 55 billion DZD allocated to the sectors of health, youth and sports, administrative and cultural facilities.
- Economic infrastructure: 147.4 billion DZD allocated to the sectors of transport, irrigation, environment, and energy.

2.1.2. Supplementary Program for Growth Support (2005–2009)

This program was adopted to continue the momentum of projects and initiatives previously launched under the Economic Recovery Support Program. It was allocated approximately 4,203 billion DZD (55 billion USD). Public expenditure on infrastructure was distributed as follows:

- Educational infrastructure: 400 billion DZD.
- Administrative, social, and cultural infrastructure: 179 billion DZD.
- Economic infrastructure: 1,300 billion DZD.

2.1.3. Economic Growth Consolidation Program (2010–2014)

For the implementation of this program, also known as the First Five-Year Plan, a financial envelope of 21,214 billion DZD (286 billion USD) was allocated. The program was divided into two main components (2010 مجلس الوزراء):

- Completion of major ongoing projects, particularly in the railway, road, and water sectors, with an allocation of 9,700 billion DZD (130 billion USD).
- Launch of new projects with an allocation of 11,534 billion DZD (156 billion USD).

Public expenditure on infrastructure was summarized as follows:

- Educational infrastructure: 1,998 billion DZD.
- Administrative, social, and cultural infrastructure: 3,283 billion DZD.
- Economic infrastructure: 3,100 billion DZD.

2.1.4. Five-Year Growth Program (2015–2019)

The Algerian government allocated approximately 19,433 billion DZD (262 billion USD) to this program. Particular emphasis was placed on economic infrastructure, which received 4,300 billion DZD. This allocation aimed to improve Algeria's position in global competitiveness rankings through:

- Enhancing the educational system by creating and developing educational infrastructure and supporting scientific research.
- Modernizing and upgrading public services through the construction of administrative facilities and ensuring their continuous adaptation to changing environments.
- Addressing youth concerns and expanding healthcare coverage.

From the foregoing, it can be concluded that the development programs adopted by the Algerian government since 2000 demonstrate the significant importance attached to financing infrastructure projects due to their crucial role in economic development and their impact on other sectors. The government initially focused on rehabilitating infrastructure to overcome the deficiencies caused by the "Black Decade" through the first program, which was allocated 7 billion USD. This was followed by a substantial increase in funding, reaching 55 billion USD under the second program and 286 billion USD under the third program. The fourth program was allocated 262 billion USD with the objective of completing and further developing the planned projects.

2.2. The State of Tourism in Algeria

2.2.1. Number of Tourist Arrivals to Algeria:

All countries seeking to develop their tourism sector strive to increase the number of incoming tourists to the maximum level that their capacities can accommodate. This is achieved through improving the tourism supply by highlighting the country's tourism assets and enhancing the quality of tourism services provided. The objective is to benefit from the revenues generated by this sector and utilize them to support the national economy and diversify its sources of income, particularly in a country such as Algeria, which relies heavily on oil revenues.

The following table presents the number of tourists arriving in Algeria, including both foreign visitors and Algerians residing abroad, as well as the share of each category in the total number of arrivals during the period from 2015 to 2024.

Table No. (01): Tourist Arrivals to Algeria During the Period (2015–2024)

| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------------------------------------|------------------|------------------|------------------|------------------|------------------|----------------|----------------|------------------|------------------|------------------|
| Foreigners | 1.083.121 | 1.322.712 | 1.708.375 | 2.018.753 | 1.933.778 | 509.736 | 66.995 | 757.380 | 2.195.519 | 2.454.706 |
| Percentage of Foreigners | 63,34 | 64,85 | 69,70 | 75,97 | 81,55 | 86,24 | 53,59 | 54,17 | 66,68 | 70,24 |
| Algerians Residing Abroad | 626.873 | 716.732 | 742.410 | 638.360 | 437.278 | 81.295 | 58.243 | 640.668 | 1.096.989 | 1.039.699 |
| Percentage of Residents Abroad | 36,65 | 35,14 | 30,30 | 24,02 | 18,44 | 13,75 | 46,50 | 45,82 | 33,31 | 29,75 |
| Total Arrivals | 1.709.994 | 2.039.444 | 2.450.785 | 2.657.113 | 2.371.056 | 591.031 | 125.238 | 1.398.048 | 3.292.508 | 3.494.405 |

Source: Ministry of Tourism and Handicrafts, Tourism and Handicrafts Statistics

Dashboard, available at: <https://www.mta.gov.dz/tableaux-de-bord/> (accessed 11/05/2025).

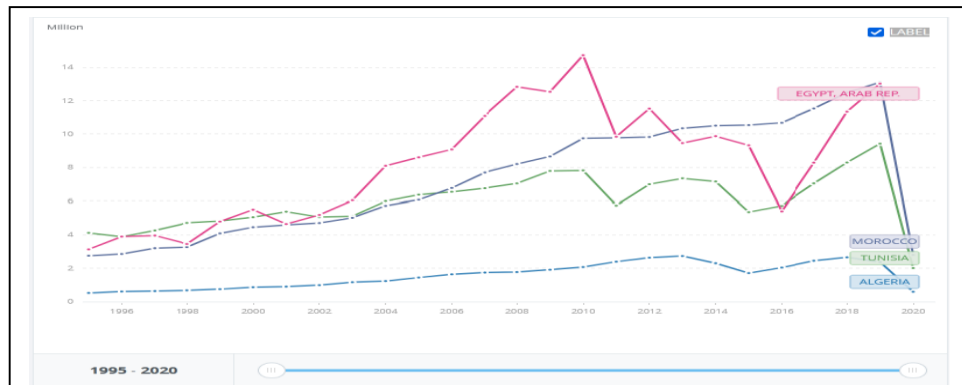
In order to make effective use of the data presented in the above table, it should be noted that the years 2020 and 2021 constitute a special case and cannot be relied upon for analysis or for generalizing results. These years witnessed a sharp decline in the number of tourists due to the COVID-19 pandemic, which affected the entire world and led to the implementation of preventive measures, most notably travel restrictions except for essential cases. Therefore, this period can only be used to assess the extent to which natural disasters and epidemics impact the tourism sector.

Based on the statistics presented in the table above, it can be observed that the total number of tourists in Algeria experienced continuous growth during the period from 2015 to 2024 (with the exception of 2020 and 2021), particularly from 2023 onward, when the number of tourists reached 3.3 million. This increase may be attributed to the efforts undertaken by the government to promote tourism in Algeria. Furthermore, the restrictions on travel during the COVID-19 pandemic encouraged people to travel more extensively after the crisis had subsided.

Regarding the profile of tourists arriving in Algeria, the proportion of foreign tourists ranged between 54% and 81% (consistently representing more than half of total arrivals), which constitutes a positive indicator of the development of tourism in Algeria. A review of earlier statistics, particularly those prior to 2013, reveals that the majority of visitors consisted of Algerians residing abroad who returned to their country of origin for personal and family-related reasons (in addition to tourism purposes). Consequently, the relevant authorities should continue to focus on attracting a larger number of foreign tourists.

To assess the significance and relative weight of the number of tourists attracted to Algeria, a comparison will be made with selected Arab countries, namely its neighboring countries, Tunisia and Morocco, as well as the Arab Republic of Egypt. The following figure illustrates the number of international tourist arrivals in Algeria, Tunisia, Morocco, and Egypt during the period from 1995 to 2020, which corresponds to the period for which data are available.

Figure No. (02): International Tourist Arrivals in Algeria, Tunisia, Morocco, and Egypt (1995–2020).



Source: world bank, international tourism: number of arrivals, available at: <https://data.worldbank.org/indicator/ST.INT.ARVL?end=2020&locations=DZ-TN-MA-EG&start=1995> (12/07/2025).

The previous figure shows that the number of tourist arrivals in Algeria followed an upward trend over the years. However, this number remained relatively limited during the 1990s, reaching approximately half a million tourists in 1995 and never exceeding the threshold of one million tourists throughout that period. This situation can be attributed to the difficult security conditions experienced by Algeria during the so-called “Black Decade.” In contrast, the number of tourists recorded significant growth in subsequent years, surpassing two million visitors in 2018. It is also noteworthy that the number exceeded three million tourists in 2023, according to the data presented in Table No. 01.

Although Algeria possesses numerous and diverse tourism assets that qualify it to be among the most attractive tourist destinations not only in the Arab world but also globally, a comparison with neighboring countries reveals a considerable gap. The peak figure of 2.6 million tourists achieved by Algeria in 2018 had already been reached by both Morocco and Egypt in 1995, while Tunisia recorded more than 4 million tourists during the same year. Furthermore, based on the data presented in Table No. 01, Algeria’s highest historical figure reached 3.5 million tourists, whereas the maximum values recorded by the other countries ranged between 10 and 14 million tourists.

These results indicate that Algeria still needs substantial efforts to reach the levels achieved by neighboring countries in this field, not to mention the world's leading tourism destinations. Accordingly, it has become essential for Algeria to keep pace with modern developments in the tourism sector in order to transform it into one of the country's key productive sectors.

2.2.2. Evolution of Tourism Revenue in Algeria

Tourism revenue is considered an important indicator of the extent to which a sector is utilized and the benefits derived from it. The following table presents tourism revenue in Algeria (at current U.S. dollar prices) for the period extending from 1995 to 2020.

Table No. (02): Tourism Revenue in Algeria.

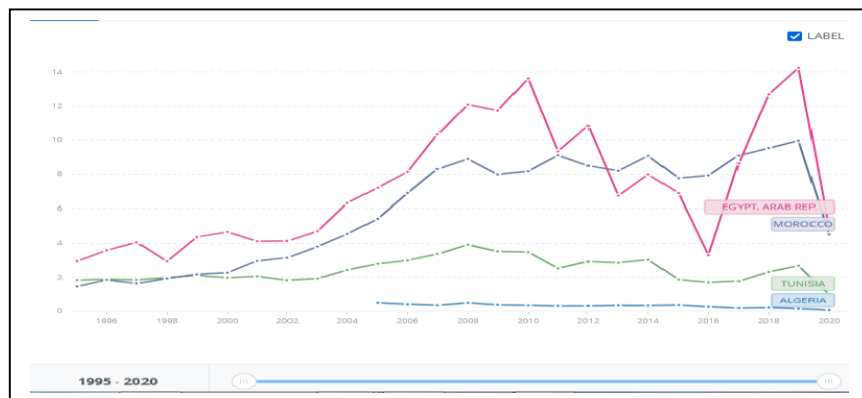
| Years | 1995 | 1997 | 2000 | 2004 | 2005 | 2008 | 2012 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|-----------------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| Tourism Revenue | 0,03 | 0,02 | 0,1 | 0,17 | 0,47 | 0,47 | 0,29 | 0,35 | 0,24 | 0,17 | 0,19 | 0,14 | 0,05 |

Source: World Bank, International Tourism: Receipts (current US\$), available at: <https://data.worldbank.org/indicator/ST.INT.RCPT.CD?end=2020&locations=DZ&start=2005&view=chart> (accessed 13/07/2025).

From the table above, it is evident that tourism revenues experienced considerable fluctuations over the study period. Tourism receipts did not exceed 33 million USD in 1995; however, beginning in 2000, revenues surpassed 100 million USD, reaching approximately 470 million USD in 2008. This increase can be attributed to the improvement of the country's security and economic conditions.

After 2008, the general trend of tourism revenues became downward, as receipts failed to reach the 500 million USD mark despite the continuous growth in the number of tourists. This indicates a limited effectiveness in leveraging the tourism sector to generate higher revenues. To assess the relative importance and contribution of tourism revenues in Algeria, a comparison with neighboring countries is necessary. The following figure illustrates tourism receipts in Algeria, Tunisia, Morocco, and Egypt during the period from 1995 to 2020.

Figure 03: Tourism Receipts in Algeria, Tunisia, Morocco, and Egypt (Billion USD), 1995–2020.



Source: World Bank, International Tourism: Receipts (current US\$), available at: <https://data.worldbank.org/indicator/ST.INT.RCPT.CD?locations=DZ-TN-MA-EG> (11/07/2025).

Based on the analysis of the tourism revenue curve, as well as Table No. (02), it is evident that Algeria's tourism revenues remain very low compared to those of Tunisia and Morocco, both of which recorded more than 1.5 billion USD in 1995, as well as Egypt, whose tourism revenues reached approximately 3 billion USD in the same year. By contrast, Algeria's tourism revenues did not exceed the threshold of 500 million USD in any year up to 2020, despite the country possessing diverse tourism assets that qualify it to become a distinguished tourist destination. This indicates that the growth of tourism revenues in Algeria has remained limited and inconsistent with the available potential, which calls for greater attention from the relevant authorities to enhance the sector's performance, at least to a level comparable to that of neighboring countries.

When Algeria is compared with leading tourism destinations, such as the so-called "Asian Tigers," the disparity in tourism revenues becomes even more apparent. In 2018, Japan's tourism revenues exceeded 45 billion USD, while Singapore recorded more than 20 billion USD and South Korea over 23 billion USD. In contrast, Algeria's tourism revenues have never surpassed 500 million USD since 1995.

2.2.3. Ratio of Tourism Revenues to Total Exports in Algeria

To assess the importance of the revenues generated by a particular sector, they may be compared with the country's total export earnings. The following table presents the ratio of tourism revenues to total exports in Algeria during the period 2005–2020, which corresponds to the period for which data are available on the World Bank website.

Table No. (03): Ratio of Tourism Revenues to Total Exports in Algeria during the Period (2005–2020).

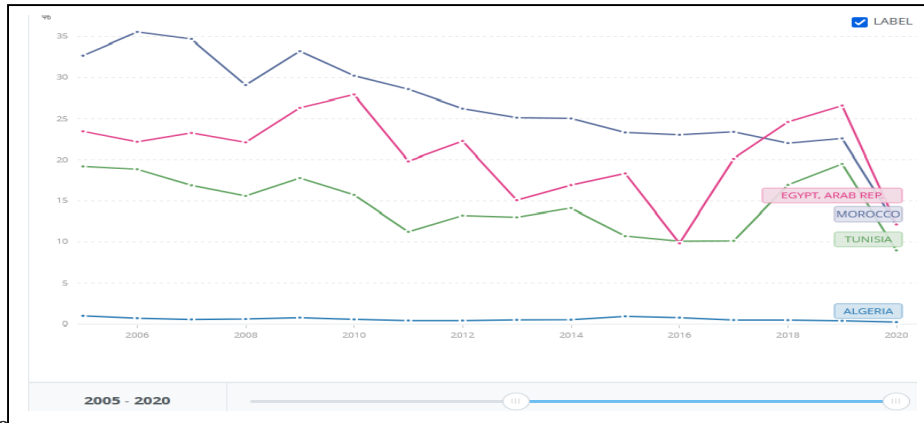
| Years | 2005 | 2008 | 2010 | 2012 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|------|------|------|------|------|
| Percentage of Tourism Revenue to Total Revenue | 0,98 | 0,58 | 0,53 | 0,39 | 0,95 | 0,74 | 0,5 | 0,4 | 0,4 | 0,2 |

Source: World Bank, International Tourism: receipts (% of total exports), available at: <https://databank.worldbank.org/reports.aspx?source=2&series=ST.INT.RCPT.XP.ZS&country=DZA> (16/07/2025).

From the table presented above, it is evident that the share of tourism receipts in total exports in Algeria experienced fluctuations over the study period. However, this share never exceeded 1%, reaching its highest level of 0.98% in 2005. Even before comparing these results with those of any other country, they can be considered very low. A contribution of only 1% of total exports from tourism revenues in a country such as Algeria, which possesses significant tourism potential, indicates that insufficient importance has been given to this sector. This situation can largely be attributed to Algeria's heavy reliance on the hydrocarbons sector as the primary source of its export earnings.

To gain a deeper understanding of these results, a comparison was made with neighboring countries. The following figure illustrates the ratio of tourism receipts to total exports in Algeria, Tunisia, Morocco, and Egypt during the period from 2005 to 2020.

Figure (04): Tourism Receipts as a Percentage of Total Exports in Algeria, Tunisia, Morocco, and Egypt.



Source: World Bank, International Tourism: Receipts (% of total exports), available at: <https://data.worldbank.org/indicator/ST.INT.RCPT.XP.ZS?end=2020&locations=DZ-TN-MA-EG&start=2005&view=chart> (16/07/2025).

By examining the overall trend in the evolution of the share of tourism revenues in total exports in neighboring countries, it becomes clear that it has experienced a noticeable decline since 2009. This can be explained by the repercussions of the financial crisis, which affected economic and living conditions in various countries around the world. This, in turn, was reflected in tourism sector revenues, in addition to the improvement of export earnings in other economic sectors.

Despite this decline, comparing the share of tourism revenues in total exports in these countries with Algeria shows that their tourism performance remains relatively better. Indeed, although there was a decrease, these countries recorded significant percentages. In 2005, the share exceeded 32% in Morocco, 19% in Tunisia, and 23% in Egypt, whereas in Algeria it did not exceed 1%, reflecting the continued heavy reliance of the Algerian economy on the hydrocarbon sector in its export structure.

2.2.4. Algeria's ranking in the field of tourism

The growing interest in tourism by many countries, along with their awareness of the importance of investing in this sector, has intensified competition in this field. Countries have increasingly competed for top positions in order to increase their revenues from tourism. To determine Algeria's ranking, we consulted the Travel and Tourism Competitiveness Index (TTCI), which ranks countries worldwide in the field of tourism.

The following table shows the ranking of Algeria, Tunisia, Morocco, and Egypt according to the Travel and Tourism Competitiveness Index over the period from 2007 to 2024 (the periods during which the World Economic Forum published reports on travel and tourism competitiveness).

Table No. (04): Ranking of Algeria, Tunisia, Morocco, and Egypt according to the TTCI index.

| Year Country | 2007 | 2009 | 2011 | 2013 | 2015 | 2017 | 2019 | 2021 | 2024 |
|---|------|------|------|------|------|------|------|------|------|
| Algeria | 93 | 115 | 113 | 132 | 123 | 118 | 116 | - | 98 |
| Tunisia | 34 | 44 | 47 | / | 79 | 87 | 85 | 80 | 83 |
| Morocco | 57 | 75 | 78 | 71 | 62 | 65 | 66 | 71 | 82 |
| Egypt | 58 | 64 | 75 | 85 | 83 | 74 | 65 | 51 | 61 |
| Total Number of Countries Included in the Index | 124 | 133 | 139 | 140 | 141 | 136 | 140 | 117 | 119 |

Source: World Economic Forum, Travel & Tourism Competitiveness Report, various editions: 2007, 2009, 2011, 2013, 2015, 2017, 2019, 2021, 2024.

From the table presented above, it can be observed that Algeria occupies the lowest ranks in the field of tourism, as its ranking is often above 100 out of approximately 140 countries. Moreover, its position does not come close to that of neighboring Arab countries such as Tunisia, Morocco, and Egypt, despite the fact that Algeria ranks among the leading countries in terms of natural landscapes, climate, and tourism-related potential factors that could enable it to excel in the tourism sector.

2.2.5. Algeria's ranking according to the priority given to the tourism sector

Over recent years, the level of attention given to the tourism sector has varied from one country to another. However, countries that have truly recognized the importance of this sector have prioritized it in order to develop it and benefit from its potential. To assess the extent of the priority assigned by Algeria to the development of the travel and tourism industry, we examined the Travel & Tourism Competitiveness Index (TTCI), which includes a sub-index that measures the priority given by governments to developing the travel and tourism industry. This index assigns countries a score ranging from 1 to 7 (where 1 indicates that tourism is not a priority at all, and 7 indicates the highest possible priority), after which countries are ranked from the highest to the lowest score.

The following table presents Algeria's ranking within this index over the period 2007 to 2017.

Table No. (05): Algeria's ranking within the index measuring the priority given to developing the travel and tourism industry by governments.

| Year Index | 2007 | 2009 | 2011 | 2013 | 2015 | 2017 | 2019 | 2021 | 2024 |
|--|------|------|------|------|------|------|------|------|------|
| Value | 2,92 | 3,04 | 3,07 | 3,00 | 3,80 | 2,84 | 3.1 | - | - |
| Rank | 109 | 124 | 130 | 138 | 130 | 131 | 132 | - | - |
| Number of Countries Included in the Index. | 124 | 133 | 139 | 140 | 141 | 136 | 140 | 117 | 119 |

Source: World Economic Forum, Op. Cit.

From the table above, it is clear that Algeria does not give significant importance to the tourism sector as a productive sector capable of generating substantial revenues. Indeed, it ranks at the bottom of the global list in the Travel & Tourism Government Prioritization Index. This can be explained by its heavy reliance on the hydrocarbons sector and its lack of commitment to achieving economic diversification, which could serve as an effective strategy to improve Algeria's economic situation.

2.3. Tourism Infrastructure in Algeria

Tourism development requires the coordination of human efforts and the provision of adequate funding to implement the planned infrastructure projects necessary to meet tourists' diverse needs and expectations. This, in turn, contributes to revitalizing and upgrading the tourism sector.

2.3.1. The Tourism Development Master Plan 2025 (SDAT)

This plan represents the strategic and reference framework for tourism policy in Algeria. It defines the long-term vision for sustainable tourism development in the short term (2009), medium term (2015), and long term (2025). It is part of the National Spatial Planning Scheme (SNAT).

The tourism development hubs of excellence established by Algeria within this plan constitute essential infrastructure that can contribute to revitalizing the tourism sector in the country.

a. Tourism Development Hub Projects of Excellence

A tourism hub is a specific geographical area equipped with various accommodation facilities, which requires the development of infrastructure across multiple sectors such as construction, transport, water supply, telecommunications, internet networks, etc. The main infrastructure investment projects for these hubs can be summarized in the following table:

Table No. (06): Government investment in infrastructure for tourism development hubs of excellence.

| Tourism Excellence Poles | Geographical Area | Tourism Infrastructure Projects |
|---------------------------------------|--|--|
| North-East Tourism Excellence Pole | -Area: 80,347 km ² -Wilayas: Skikda, Guelma, Annaba, El Tarf, Souk Ahras, Tébessa | -Hotels of various categories -Tourism villages of excellence |
| North-Central Tourism Excellence Pole | Area: 33,817 km ² Wilayas: Algiers, Tipaza, Boumerdès, Chlef, Aïn Defla, Médéa, Bouira, Tizi Ouzou, Béjaïa | -Hotels of various categories -Tourism villages of excellence -In addition: New cities (Sidi Abdellah, Bouinan, Boughezoul) |

| | | |
|---|---|---|
| North-West Tourism Excellence Pole | Area: 35,000 km ² Wilayas: Oran, Aïn Témouchent, Tlemcen, Mostaganem, Mascara, Sidi Bel Abbès, Relizane | -Hotels of various categories -Tourism villages of excellence -In addition: Expansion of the road network (East–West Highway, Oran–Aïn Témouchent expressway, Oran tramway) Seawater desalination plant |
| South-East Tourism Excellence Pole (Oases) | Area: 160,000 km ² Wilayas: Ghardaïa, Biskra, El Oued | -Hotels of various categories -In addition: -Rehabilitation of international airports in Biskra and Ghardaïa Trans-Saharan highway |
| South-West Tourism Excellence Pole (Touat) | Area: 603,000 km ² Wilayas: Adrar, Béchar | -New hotels -Tourism village: Ksar Massine in Timimoun -In addition: “Palace Route” project within the UNESCO program |
| Grand South Tourism Excellence Pole (Tassili) | Area: 284,618 km ² Wilaya: Illizi | New hotels + luxury hotel |
| Grand South Tourism Excellence Pole (Ahaggar) | Area: 456,200 km ² Wilaya: Tamanrasset | -New hotels |

Source: Ministry of Territorial Development, Environment and Tourism, Tourism Development Master Plan “SDAT 2025”, Book 03: The Seven Tourism Excellence Poles (POT), January 2008.

In addition to the above, the tourism master plan also focused on four other dynamics (schemes) that are essential for achieving the expected benefits from major investments in infrastructure and, consequently, for developing an effective tourism industry in Algeria. These schemes are summarized as follows (Ministere de l’Amenagement du Territoire de l’Enve, 2008):

- Enhancing Algeria’s destination image to increase its attractiveness and competitiveness: by changing the perception previously held by foreigners regarding the security situation in Algeria during the “Black Decade” of the 1990s, as well as promoting the country’s tourism assets internationally through the use of communication tools and the establishment of effective companies at the international level, benefiting from the experiences of leading countries in this field.
- Implementation of a tourism quality scheme: aimed at developing excellence in national tourism offerings by integrating training through professional development, education, and openness to information and communication technologies, which helps align with international quality standards.
- Public–Private Partnership (PPP) scheme: the private sector is considered a key partner in advancing the tourism sector and contributing to sustainable tourism development. Operators in both sectors aim to respond more effectively to collective demand through

the sharing of resources, risks, and profits, which in turn reduces the financial burden on the state in funding economic projects.

- Tourism financing scheme: ensuring the availability of necessary funding for the tourism sector, as it requires significant capital investment in buildings and equipment, the returns on which may take a long time to materialize.

b. Priority infrastructure projects for the period 2008–2015

Priority projects were defined within the framework of the SDAT 2025 tourism development plan and can be divided as follows (عياشي، 2016):

- Hotels belonging to internationally renowned chains, with a total capacity of 29,386 beds.
- 23 high-quality tourist villages, in addition to allocating several land plots for tourism expansion.
- Tourism-oriented amusement parks (Annaba, Constantine, Algiers, Oran, and oasis parks).
- Health, wellness, and medical treatment centers (Hammam Gorga, Hammam Melouane, Chréa).
- Launch of 80 tourism projects across six tourism excellence poles.

The following table shows the number of planned hotels (and their bed capacity) distributed across the tourism excellence poles.

Table No. (07): Hotel projects within the priority projects of the SDAT plan2025

| Poles/Regions | Number of Hotels | Number of Beds |
|-----------------------|------------------|----------------|
| Northeast | 86 | 5965 |
| North Central | 49 | 9295 |
| Northwest | 85 | 10146 |
| Southeast (Oases) | 26 | 2092 |
| Southwest (Touat) | 23 | 1513 |
| Great South (Tassili) | 01 | 150 |
| Great South (Ahaggar) | 04 | 225 |
| Total | 274 | 29386 |

Source: عبد الله عياشي، استراتيجيات تنمية السياحة البيئية في الجزائر من منظور الاستدامة: حظيرة الطاسيلي بولاية ايليزي نموذجا، أطروحة دكتوراه علوم، جامعة قاصدي مرباح، ورقلة، الجزائر، 2016.

2.3.2. Algeria's Ranking in Terms of Tourism Infrastructure

Through the sub-index of the Travel & Tourism Competitiveness Index (TTCI) related to the business environment and infrastructure, we can examine Algeria's ranking across various sub-indicators that affect the tourism sector. In this study, we focus specifically on the tourism infrastructure sub-index.

The following table presents the TTCI sub-index for business environment and infrastructure over the period 2007–2019.

Table No. (08): TTCI sub-index of business environment and infrastructure

| Year Indicator | 2007 | 2009 | 2011 | 2013 | 2015 | 2017 | 2019 |
|-------------------|-----------|-----------|------------|------------|------------|------------|------------|
| Business | 93 | 98 | 110 | 126 | 133 | 106 | 118 |

| Environment and Tourism Infrastructure Index | | | | | | | |
|--|------------|------------|------------|------------|------------|------------|------------|
| Air transport | 101 | 110 | 103 | 115 | 113 | 100 | 99 |
| Land and maritime transport | 78 | 101 | 105 | 126 | 121 | 105 | 90 |
| Tourism services infrastructure | 114 | 95 | 122 | 131 | 138 | 131 | 136 |
| Information technology environment in the sector | 118 | 97 | 107 | 115 | 105 | 96 | 89 |
| Total number of countries included in the index | 124 | 133 | 139 | 140 | 141 | 136 | 140 |

Source: World Economic Forum, Op. cit.

From the above table, it can be observed that Algeria has experienced fluctuations in its ranking in recent years. It has achieved progress at times, but has also regressed in other periods. Looking at the components of the Tourism Infrastructure Index, Algeria still occupies the lowest positions across all its components, whether in transport (air, land, and sea), infrastructure, or information technology systems required for tourism services. This confirms that, despite the investments made by the state in infrastructure across various sectors, including tourism, Algeria is still far from the optimal exploitation of its potential to improve and develop infrastructure, which is considered the foundation of all other sectors, as no sector can function without it.

3. Study Results

When examining this study from both theoretical and applied perspectives, and after presenting and analyzing the main indicators and statistics available on the websites of national and international institutions specialized in tourism and infrastructure, as well as comparing Algeria's tourism infrastructure indicators with those of neighboring countries such as Tunisia, Morocco, and Egypt, we reached a set of key findings, the most important of which are:

- Algeria has made significant efforts in recent years to rehabilitate infrastructure across various sectors and has launched numerous new projects, as reflected in public spending on development programs and infrastructure allocations.
- Despite possessing diverse tourism assets that qualify it to be among distinguished tourist destinations, Algeria's tourism indicators remain very weak and do not reflect its available potential.
- According to the Travel & Tourism Competitiveness Index (TTCI), Algeria ranks among the lowest positions out of more than 130 countries, indicating an underutilization of its tourism resources, which could otherwise strengthen both the tourism sector and the national economy.
- Algeria also ranks low in the index measuring "government prioritization of the Travel & Tourism industry," reflecting insufficient attention to the sector despite initiatives aimed at its development.

- The number of tourists visiting Algeria has not exceeded four million even by 2024, indicating that a long path still lies ahead for Algeria to achieve a real upgrade of its tourism industry and benefit from it.
- Algeria's tourism revenues remain weak compared to what would be expected for a country with such potential, especially when compared with Tunisia, Morocco, and Egypt, and even with global tourism leaders such as Japan and Singapore. This highlights a significant gap and confirms that Algeria has not kept pace with global developments in this field.
- Continued reliance on hydrocarbons in exports and the lack of effective economic diversification policies make it difficult to develop other sectors, including tourism, whose contribution to total exports does not exceed 1%.
- Efforts to develop tourism infrastructure remain limited compared to actual potential. This is confirmed by the "Business Environment and Tourism Infrastructure" sub-index (within the TICI), where Algeria continues to rank low in transport infrastructure (air, sea, and land), as well as in tourism services infrastructure and information technology systems.

4. Study Recommendations

After reviewing the findings of this study on the reality of infrastructure investment in Algeria and its position in the tourism sector, a set of recommendations can be proposed. Although these are generally clear to the Algerian authorities, they are often not sufficiently implemented. The most important are:

- Define Algeria's tourism identity and establish a distinctive national brand.
- Make use of the country's geographical, cultural, and historical diversity, as well as its unique customs and traditions.
- Grant the tourism sector real priority as a productive sector within the national economy, ensuring that this priority is reflected in effective, continuously implemented projects free from chronic delays or failures.
- Integrate infrastructure development strategy as a fundamental option for tourism development in particular and economic development in general.
- Strengthen infrastructure development and improve tourism services, especially in areas lacking essential facilities, in order to encourage repeated tourist visits to Algeria.
- Achieve greater integration between tourism infrastructure development and more ambitious investment promotion in the sector.
- Focus on the Algerian Sahara, which represents a genuine tourism resource, by first providing the necessary infrastructure and services, followed by effective promotion through various media channels.
- Diversify forms of tourism, such as maritime tourism or "yacht tourism," and develop the required infrastructure for such activities.
- Remove administrative and bureaucratic barriers to encourage investment in tourism and infrastructure, and open new partnerships with the private sector.
- Develop the banking system and make it more flexible to support the tourism sector.

In conclusion, it can be emphasized that continued hydrocarbon revenues supporting the national economy should not prevent the investment of Algeria's tourism potential. Tourism is a sector capable of contributing effectively to economic development and income diversification. Moreover, the rapid changes in the global economy, ongoing volatility in energy markets, and the growing shift toward alternative energy sources all require Algeria to accelerate economic

diversification efforts and reduce excessive dependence on hydrocarbons. Therefore, developing the tourism sector and providing the necessary conditions for its success represent a strategic choice that can contribute to enhancing economic growth and achieving more sustainable long-term development.

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*TTCI : Travel & Tourism Competitiveness Index.

*SDAT : Schéma directeur d'aménagement Touristique.

** SNAT : Le Schéma National d'aménagement du Territoire.