



REPUBLIC OF TUNISIA
MINISTRY OF TOURISM, LEISURE AND HANDICRAFT
TUNISIAN NATIONAL TOURIST OFFICE

JAPAN INTERNATIONAL COOPERATION AGENCY

VOLUME II: REGIONAL PLAN AND ACTION PLAN



THE STUDY
ON TOURISM DEVELOPMENT PLAN
FOR THE YEAR 2016 IN THE REPUBLIC OF TUNISIA
Upgrading the Condition of Cultural, Ecological
and Saharan Tourism Resources

FINAL REPORT
JUNE 2001

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NIPPON KOEI

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**PADECO, Co., Ltd.
NIPPON KOEI, Co., Ltd.**

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FINAL REPORT

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ABBREVIATIONS

AAGR	: Average Annual Growth Rate
AFT	: Tourism Estate Agency
ALS	: Average Length of Stay
AMVPPC (or APPC)	: Heritage Valorization and Cultural Promotion Agency
ANPE	: National Agency for Environment Protection
ATEP	: Tunisian Agency for Professional Training
ATPNE	: Tunisian Association for Protection of Nature and Environment
BNDT	: National Tourism Development Bank
BOO	: Build-Operate-Own
BOT	: Build-Operate-Transfer
BTP	: Degree of Professional Technician
BTS	: Degree of Superior Technician
CAP	: Certificate of Professional Aptitude
CIQ	: Customs, Immigration and Quarantine
CMR	: Restricted Ministerial Council
CNDD	: National Commission for Sustainable Development
CRDA	: Regional Commission for Agricultural Development
CTN	: Tunisian Navigation Company
DESS	: Diploma of Specialized Higher Study
DGAT	: General Direction of Land Development, MEAT
EIA	: Environmental Impact Assessment
EIE	: Environmental Impact Assessment
EU	: European Union
FDI	: Foreign Direct Investment
FIT	: Foreign Individual Tourist
FTAV	: Tunisian Travel Agency Federation
FTH	: Tunisian Hotel Federation
GDP	: Gross Domestic Product
ICOMOS	: International Council on Monuments and Sites
IHEC	: Institute of High Commercial Studies
IMF	: International Money Fund
INP	: National Heritage Institute
INS	: National Statistic Institute
ISHT	: High Institute of Hotel Business and Tourism
IUCN	: World Conservation Union
JBIC	: Japan Bank for International Cooperation
JICA	: Japan International Cooperation Agency
MA	: Ministry of Agriculture
MAE	: Ministry of Foreign Affairs
MAP	: Mediterranean Action Plan
MAS	: Ministry of Social Affairs
MC	: Ministry of Culture

MCIE	: Ministry of International Cooperation and Foreign Investment
MDE	: Ministry of Economic Development
MEAT	: Ministry of Environment and Land Planning
MEDA	: Euro-Med Heritage Program
MEH	: Ministry of Equipment and Housing
MF	: Ministry of Finance
MFPE	: Ministry of Professional Training and Employment
MI	: Ministry of Interior
MICE	: Meetings, Incentives, Conventions and Exhibitions
MS	: Ministry of Public Health
MT	: Ministry of Transport
MTLA	: Ministry of Tourism, Leisure and Handicraft
OACA	: Civil Aviation and Airport Authority
OECD	: Organization for Economic Cooperation and Development
OMMP	: Merchant Marine and Port Authority
ONAS	: National Sewerage Office
ONAT	: Tunisian National Handicraft Office
ONTT	: Tunisian National Tourist Office
SIT	: Special Interest Tourist
SMLT	: Tunisian Rapid Transit Company
SNCFT	: Tunisian Railroad Company
SNTRI	: National Interurban Transport Company
SOCOPA	: Handicraft Product Marketing Company
SONEDE	: National Company for Water Supply and Distribution
STEG	: National Company for Electricity and Gas
TCB	: Tunisian Convention Bureau
TD	: Tunisian Dinar
UNEP	: United Nations Environmental Plan
UNESCO	: United Nations Educational, Scientific and Cultural Organization
VAT	: Value Added Tax
VFR	: Visiting Friends and Relatives
WB	: World Bank
WTO	: World Tourism Organization
WWF	: World Wide Fund for Nature

10 INTRODUCTION

This report is Volume II of the Final Report of the Study on Tourism Development Plan for the Year 2016 in the Republic of Tunisia.

The Final Report consists of an executive summary and three volumes as follows:

- 1 Executive Summary
- 2 Volume I: National Plan
 - Part 1: Diagnosis of the Current Situation
 - Part 2: National Plan (2016)
- 3 Volume II: Regional Plans and Action Plan
 - Part 3: Plans for the Selected Regions (2016)
 - Part 4: Action Plan (2006)
- 4 Volume III: Appendixes – Sector Analysis

Volume I: National Plan

“Part I: Diagnosis of the Current Situation” assess the past history and the current situation of tourism development in and around Tunisia, identifies issues, and surveys future prospects.

“Part II: National Plan (2016)” recommends the most appropriate objectives and strategies for the tourism development in Tunisia based on the result of Part I, and formulates development plans for various components contributing the sector development.

Volume II: Regional Plans and Action Plan

“Part III: Plans for the Selected Regions (2016)” illustrates concrete strategies and plans for the three selected regions of Greater Tunis, Central and Southwest.

Finally “Part IV: Action Plan (2006)” indicates the most necessary and immediate actions to achieve the goals of the proposed Master Plan.

Volume III: Appendixes – Sector Analysis

This volume presents the results of the sector analysis including detailed data and information supporting the Study.

11 COMMON PLANNING ISSUES

11.1 SELECTED REGIONS

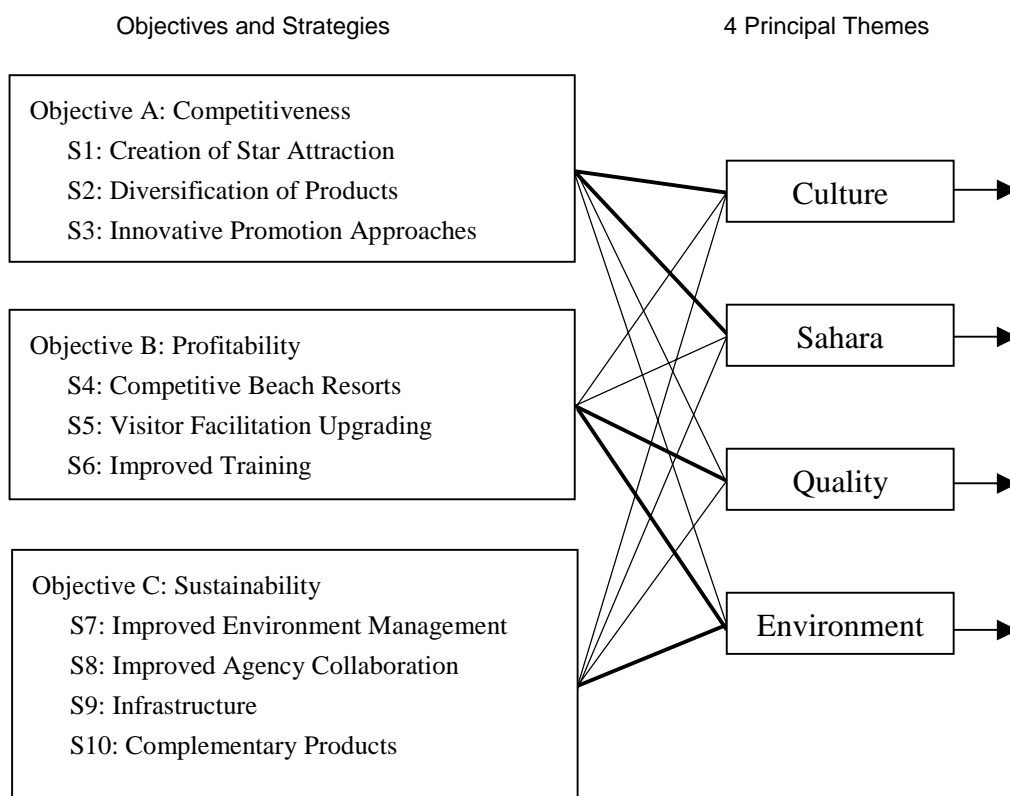
A proposed National Tourism Development Plan was formulated in Volume I. After a detailed assessment of strengths, weaknesses, opportunities and threats of the tourism sector in Tunisia, the Study Team recommended three objectives and ten strategies as tools to shape the future of Tunisian tourism.

Then, in order to develop more specific and action-based plans under these national level objectives and strategies, the 4 axes on which directions or themes of future tourism development in Tunisia have to focus were applied. They are:

- 1 Culture,
- 2 Sahara,
- 3 Quality, and
- 4 Environment.

Figure 11.1.1 illustrates the relationship among the key elements. A large number of measures including concrete programs and projects were identified as component plans in the light of the above strategies and four themes.

Figure 11.1.1 Tourism Development Objective, Strategies and Principal Themes



Source: JICA Study Team

Subsequently, based on the four principal themes, three regions were selected for the purpose of elaboration of tourism development plans at the regional level and selection of priority projects and programs to be implemented by 2006.

The selected regions are:

- 1 Greater Tunis Region: “Culture”, “Quality” and “Environment”.
- 2 Central Region: “Culture”, “Quality” and “Environment”.
- 3 Southwest Region: “Sahara”, “Quality” and “Environment”.

Figure 11.1.2 Selected Regions



Source: JICA Study Team

The primary points considered in this selection include the following:

- Greater Tunis Region and Central Region possess monumental *cultural* sites (closest to major cultural sites elsewhere in terms of their attractiveness) whose drastic upgrading will undoubtedly enhance competitiveness of the country's tourism. These regions also have major beach resorts with good potential for further development, where *quality* improvement is a key to fully capture this opportunity and enhance their competitiveness as a major tourist destination.
- Southwest Region was selected primarily as an area for the development of Saharan tourism. This region also includes Matmata-Tataouine that has a great potential for the development of Ksar, Ghorfa and Troglodyte tourism though significantly under-exploited thus far.
- For all these three regions, environmental management is an important issue to achieve sustainable tourism development (e.g., protection of coastal areas and conservation and rehabilitation of cultural and archeological sites for Greater Tunis and Central Regions, development potential of eco-tourism for Central Region, and protection of fragile natural environment and conservation of water for Southwest Region).

Note that the selected regions are defined more broadly than the ONTT tourism regions defined for administrative purposes in order to incorporate important sites and areas from a wider perspective.

For the purpose of testing the adequacy of selecting these three regions, quantitative assessment was carried out, specifically by:

- testing the consistency of the above three regions with the formulated national tourism development strategies and the extent of contribution to achieving the tourism development objectives.

The method and the result of this test are as follows:

Among the 10 selected strategies, three of them are not related to the selection of regional priority and the remaining seven strategies were chosen as criteria for the test. The selected criteria are:

- 1 Strategy 1: Capacity of creation of symbolic star attractions (10),
- 2 Strategy 2: Contribution to diversification of products on offer (7),
- 3 Strategy 4: Possibility of competitive Tunisian beach resorts (7),
- 4 Strategy 5: Availability of major sites for improvement (8),
- 5 Strategy 7: Environmental capacity (8),
- 6 Strategy 9: Less investment in infrastructure (5).
- 7 Strategy 10: Contribution to complementary programs and products (5)

Evaluation of each tourism region was made for the target year 2016 using the above criteria. For each criterion, an area judged with the high appeal was given 5

points, the medium appeal 3 points and the low appeal 1 point. In due consideration of the relative importance of the criteria, the Study Team gave weights on each criterion as indicated in the parentheses.

Weighted total scores were calculated for each tourism region. The result of the evaluation is shown in Table 11.1.1.

Table 11.1.1 Evaluation of Tourism Regions

Criteria Tourism Region	1 Rate: 10	2 Rate: 7	3 Rate: 7	4 Rate: 8	5 Rate: 8	6 Rate: 5	7 Rate: 5	Total
Tunis-Z	5 50	5 35	5 35	5 40	4 32	4 20	4 20	232
N-Hammamet	4 40	4 28	5 35	3 24	2 16	3 15	4 20	178
Sousse-K	5 50	5 35	5 35	5 40	4 32	4 20	4 20	232
Monastir-S	3 30	3 21	4 28	3 24	2 16	3 15	3 15	149
Mahadia-S	3 30	3 21	3 21	2 16	1 8	2 10	3 15	121
Jerba-Z	5 50	4 28	5 35	4 32	2 16	3 15	4 20	196
G-Tozeur	5 50	5 35	1 7	5 40	3 24	4 20	4 20	196
Sbeitla-K	1 10	3 21	1 7	3 24	3 24	3 15	2 10	111
Bizerte-B	1 10	3 21	3 21	3 24	2 16	2 10	2 10	112
Tabarka-A	1 10	3 21	3 21	3 24	2 16	2 10	2 10	112

- 1: Capacity of creation of symbolic star attractions (10)
- 2: Contribution to diversification of products on offer (7)
- 3: Possibility of competitive Tunisian beach resorts (7)
- 4: Availability of major sites for improvement (8)
- 5: Environmental capacity (8)
- 6: Less investment in infrastructure (5)
- 7: Contribution to complementary programs and products (5)

Source: JICA Study Team

Though the weights applied here are subject to discussions, the result of this objective exercise clearly indicates that the selected regions of Greater Tunis (Tunis-Z and its surroundings), Central (Sousse-K and its surroundings) and Southwest (G-Tozeur and part of Jerba-Z) are adequate for the subject regions for the elaboration of regional tourism development plan.

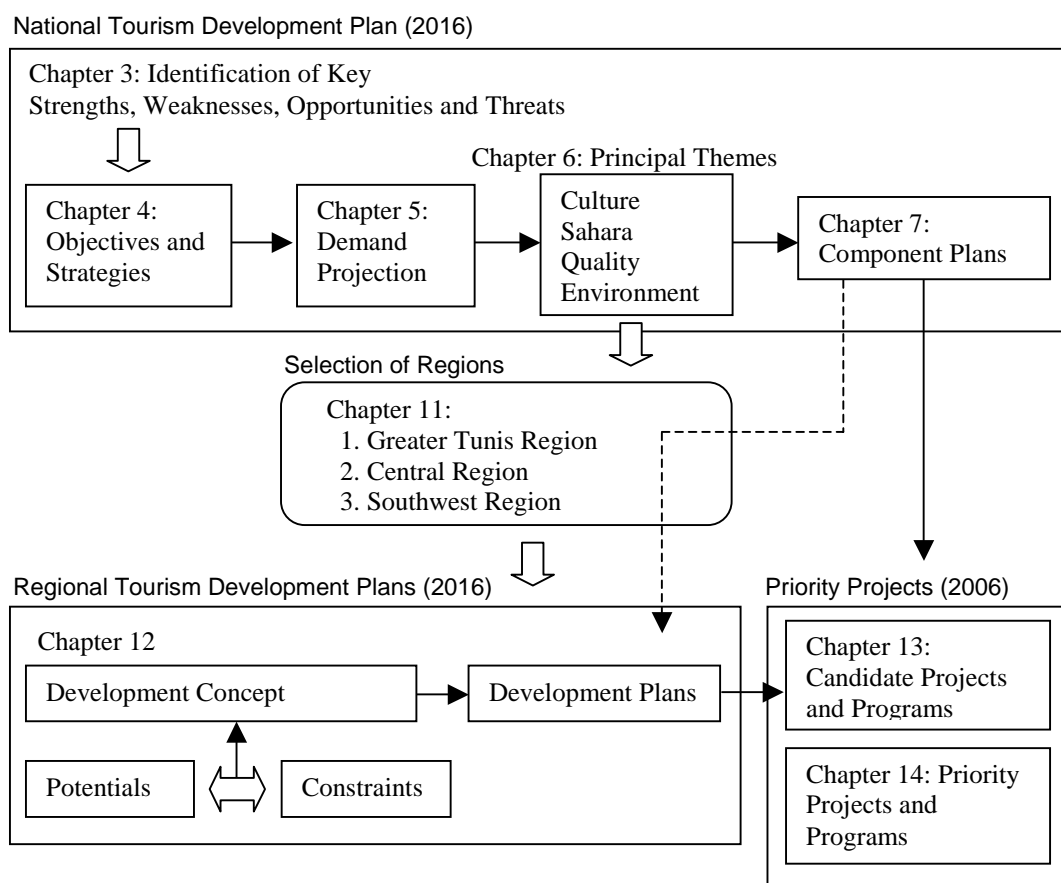
11.2 METHODOLOGY FOR REGIONAL TOURISM DEVELOPMENT PLAN

Based on the national tourism development objectives and strategies, and the demand projections by region, the Regional Tourism Development Plan for each selected region was formulated through five stages:

- 1 Analysis of potentials and constraints in each region,
- 2 Elaboration of regional tourism development strategies and concept according the four principal themes: “Culture”, “Sahara”, “Quality” and “Environment” in order to systematically orient the efforts of future tourism development and marketing (Note that as described in 6.2 Culture, Sahara, Quality and Environment (Volume I), the development concepts developed in that section (6.2) were used for the formulation of the regional plan.)
- 3 Examination of potential target markets,
- 4 Elaboration of spatial development concept taking into account the examined target market segments, and
- 5 Formulation of component plans including spatial development plan, tourism product development plan and infrastructure development plan.

Figure 11.2.1 illustrates the methodology applied in the Study.

Figure 11.2.1 Formulation of Regional Plans and Priority Projects



Source: JICA Study Team

12 PLANS FOR SELECTED REGIONS (2016)

12.1 GREATER TUNIS REGION DEVELOPMENT PLAN

12.1.1 Potentials and Constraints

This region functions as a gateway for cultural circuit tourists with its rich cultural and urban tourism resources, and with the international airport handling the second largest number of international passengers (after Monastir). It is also a gateway for the majority of beach holiday vacationers at Nabeul-Hammamet as well as for those coming to resorts in the vicinity of Tunis. A significant portion of these vacationers visits the Tunis area for cultural and urban tourism. As the capital of the country and the center of business, the region also provides no-holiday visitors with opportunities of cultural or urban discovery tourism, with a great potential to develop MICE tourism, which is at present significantly underdeveloped.

Table 12.1.1 Main Characteristics of Greater Tunis Region

Tunis-Zaghouan	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	809,070	13.2	63% of that in Jerba-Z
Non-residents	612,025	11.9	53% of that in Jerba-Z
Length of Stay (nights)	3.1	48.4	Relative to the national average
Total visitor nights	2,267,784	6.4	26% of that in Jerba-Z
Non-residents	1,873,651	5.7	23% of that in Jerba-Z
International passengers at Tunis-Carthage Airport	3,059,433	35.2	Both arrivals and departures, 85% of those at Monastir Airport
Seasonal fluctuation: Factor (1)(%)	34	116.0	Relative to the national average
Factor (2)(%)	56	90.0	Relative to the national average
Bed occupancy rate (%)	37.7	66.7	The room occupancy would be much higher.
Visitors to Carthage Park	645,167	-	
Visitors to Bardo Museum	540,759	-	
Nabul-Hammamet	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	1,080,669	17.6	84% of that in Jerba-Z
Non-residents	898,590	17.5	78% of that in Jerba-Z
Length of Stay (nights)	8.6	134.4	Relative to the national average
Total visitor nights	8,136,710	23.4	94% of that in Jerba-Z
Non-residents	7,684,307	23.2	92% of that in Jerba-Z
Seasonal fluctuation: Factor (1)(%)	25	89.3	Relative to the national average
Factor (2)(%)	60	98.4	Relative to the national average
Bed occupancy rate (%)	56.3	99.6	The room occupancy would be much higher.

Note: Factor (1) = Lowest of monthly hotel registration (arrivals) / highest of monthly registration

Factor (2) = Average monthly hotel registration (arrivals) / highest of monthly registration

Source: ONTT, Le Tourisme Tunisien en Chiffres, 1999, and Ministry of Transport

Despite abundant tourism resources possessed by the region, however, foreign tourists evaluate that their visit to Tunis is less satisfactory than that to other major destinations (Table 12.1.2).

Table 12.1.2 Results of Interview Surveys relevant to Greater Tunis Region

Item	Results	Remarks
% of visitors rated "GOOD"	Tunis: 64%; Hammamet: 71%; Sousse: 73%; Jerba: 72%; Tozeur: 77%	Lowest among the major tourist destinations
In Carthage, % of visitors rated "GOOD" for	Value: 76%; Interpretation: 46%; Signage/Facilities: 44%	The level of tourist satisfaction can be greatly enhanced with quality facilities and better interpretation.
Tourists to Carthage among those stayed in Hammamet for 3 nights or more	53%	About a half of longer-stay vacationers in Hammamet visit Carthage. (cf. Table 12.2.1 for the size of Central Region.)
Tourists spending a night or more in Tunis among those stayed in Hammamet for 3 nights or more	13%	Only a small fraction of longer-stay vacationers at Hammamet stayed in Tunis, though many of them do visit Tunis as above.
Visitors to Carthage and Bardo Museum among those used the Monastir Airport as a gateway	Carthage: 36% Bardo: 25%	Tunis is visited even by a large portion of the visitors who use Monastir as a gateway.
Maximum amount that European tour operators interviewed think acceptable to pay for Carthage Park with the current condition	TD 5.0: 5 tour operators TD 7.5: 1 operator TD 10.0: 2 operators (among 8 operators interviewed)	The majority of European tour operators interviewed value Carthage at TD5 per visitor at maximum (equal to the current entrance fee).
Other Critical Comments of European tour operators relevant to the Tunis-Z Region	"Tunisia should promote its rich cultural heritage more, besides its sea-sun-sand destinations." "Currently, the Carthage Park is a place to visit for no more than 1-2 hours."	The first point (the need for promoting cultural tourism) was raised by most of the tour operators interviewed.

Source: JICA Study Team (based on the tourist interview survey conducted in July and August 2000 and the tour operator interview survey)

According to the overall evaluation, the region possesses the following potentials:

- 1 Great potentials for development of “MICE Tourism” so far almost untapped except for the government-sponsored political reunions, particularly as the development in Gammarth zone progresses. Attractive beach holiday combination of Nabeul and Hammamet is a strong advantage for extended visitor-nights in the region, and
- 2 Great potential for development of “Urban discovery Tourism” in the region so far undeveloped or underdeveloped, by introducing a more diversified variety of themed products and circuits supported with world-class tourist facilitation (Medina of Tunis, French art deco style buildings, characteristic boutique hotels, water supply from Zaghouan to Carthage, thermal spa of Korbous, etc.).

12.1.2 Development Concept

The region, which is extremely important as being the capital, a major gateway to the Tunisian tourism, and heavily visited by a wide-range of tourists, should be upgraded drastically as a showcase of the county's cultural and urban discovery tourism, thereby enhancing the reputation of Tunisian tourism on quality and variety as well as raising the level of tourist satisfaction and extending visitor-nights in the region.

The overall tourism development concept of this region by the year 2016 is to increase its competitiveness, profitability and durability by the following strategies.

(1) Culture

- To establish Carthage as the focal point of the national heritage to disseminate the image of Tunisia's prestigious history to the world tourism market,
- To develop urban discovery tourism by improving Medina of Tunis, Barodo Museum and other cultural resources of world-class, and other tourism related private activities (souvenirs, restaurants, entertainment), and
- To develop its abundant cultural resources so as to diversify its tourism products.

(2) Quality

- To develop and promote more MICE tourism (meetings, incentive tours, conventions and exhibitions) based on the developed business support functions and various related activities including shopping, souvenirs, dining out, entertainment, etc.,
- To develop up-market resorts of the world class in the selected areas of Gammarth, Cap Bon, etc., and
- To improve the established beach resorts in Hammamet-Nabul, Gammarth by both physical improvement and staff training.

(3) Environment

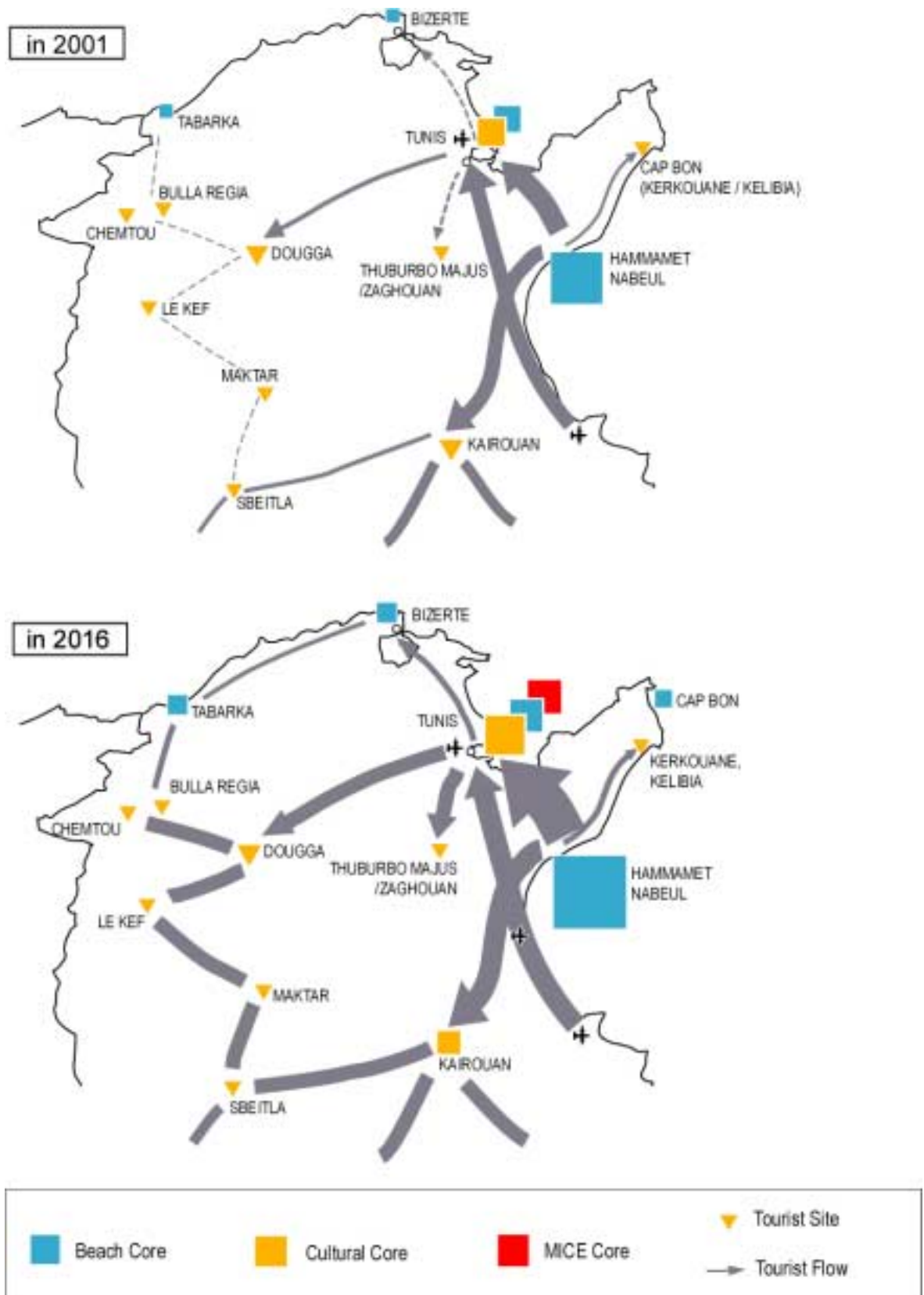
- To rehabilitate historical Medina of Tunis and the town center,
- To beautify key tourist sites and the gateway of Tunisia (airport and access roads), and
- To protect and manage natural environment so as to meet the needs for up-market beach resorts.

12.1.3 Target Markets

- 1 MICE participants and their spouse from Europe who are up-market and high spending tourists (Increasing and Great Potential),
- 2 Beach holiday tourists in the hubs of Hammamet-Nabul mainly, and secondary Sousse-Monastir and Gammart for optional Tunis excursion to Bardo and Carthage (Major Existing Inflow and Moderate Increase),
- 3 Visitors on business from Maghreb or Europe (Existing Inflow and Moderate Increase), and
- 4 Tourists from industrialized countries including North America and East Asia on themed circuits of archeological, cultural or Saharan discovery experiences for one or two-nights stop (Increasing and Good Potentials).

Figure 12.1.1 illustrates the development concept (2016) including the major target market segments and their flow, in comparison with the existing situation (in 2001).

Figure 12.1.1 Development Concept of Greater Tunis Region



Source: JICA Study Team

12.1.4 Spatial Development Plan

Figure 12.1.2 illustrates the spatial development plan of the Greater Tunis Region in the year 2016.

Growing tourism will contribute to land use pressures in some critical areas of the region. These effects are summarized below. ONTT must be aware of these effects and defend the interests of tourism in supporting developments in these areas. Other agencies have the direct responsibility to manage land development, but the ONTT voice must be heard in authorizing such projects fairly.

(1) Central Tunis

In view of the extensive urban revitalization occurring along the lakeside areas, some of which will be high density commercial in nature, the town has the opportunity to develop a waterside tourism town containing retail, hotels, cultural and convention facilities. A marina would be a logical component. Options include the Kram vicinity, the inner lakefront or anywhere along the different lakes. The formula of lakeside development has many success stories in other cities. ONTT, TCB and municipal officials must seriously consider this prospect when seeking to augment or replace the Kram facility, to compete directly with European cities for large scale conventions and trade events drawing up to 10,000 participants.

(2) Medina of Tunis

Commercial activities oriented to recreational needs and tourism are slowly developing in this sector, and will be adapting currently abandoned or under-used buildings to the year 2016 in a process of gentrification. This National Plan promotes revitalization of medinas and the redevelopment of old buildings for leisure and tourism businesses (luxury boutique hotels, art galleries), spurred by vigorous investment promotion by ONTT officials. However, to minimize conflicts with the local population ONTT must be prepared to play some role alongside the municipal authorities and ASMs to represent the interests of tourism. The medina is a crucial resource for cultural tourism and ONTT must voice the needs for practical improvements in the areas of safety, sanitation, parking and the like. ONTT can even strive for the creation of a Medina business association to organize the collective forces of the business community.

(3) Carthage

ONTT has a direct interest in preserving the beauty of the nation's most prestigious urban areas, while encouraging growing volumes of tourist bus traffic and cruise arrivals. It must express its view when urban ills like heavy commercialism or traffic congestion threaten the beauty and functionality of the region. It must also promote policies favoring the creation of more dining and entertainment establishments in communities like La Goulette and La Marsa, which will directly improve the tourist product for Greater Tunis. It must watch developments in the critical La Goulette port area where the growing cruise traffic

(both pedestrian and vehicular) needs to be carefully coordinated with urban traffic so as not to cut the desirability of La Goulette as a destination.

(4) Rural Areas like Cap Bon

This is an ideal area for low-density hotel and resort development in small towns and rural environments. To 2016 Cap Bon may become a favored area for apartment and villa projects designed for the foreign market. Bizerte also has similar potential. Functionally, since Tunisian construction costs are significantly lower than in the EU nations, both local and foreign developers will seek such locations to build capacity for vacation use.

Figure 12.1.2 Spatial Development Plan of Greater Tunis Region (1/2)

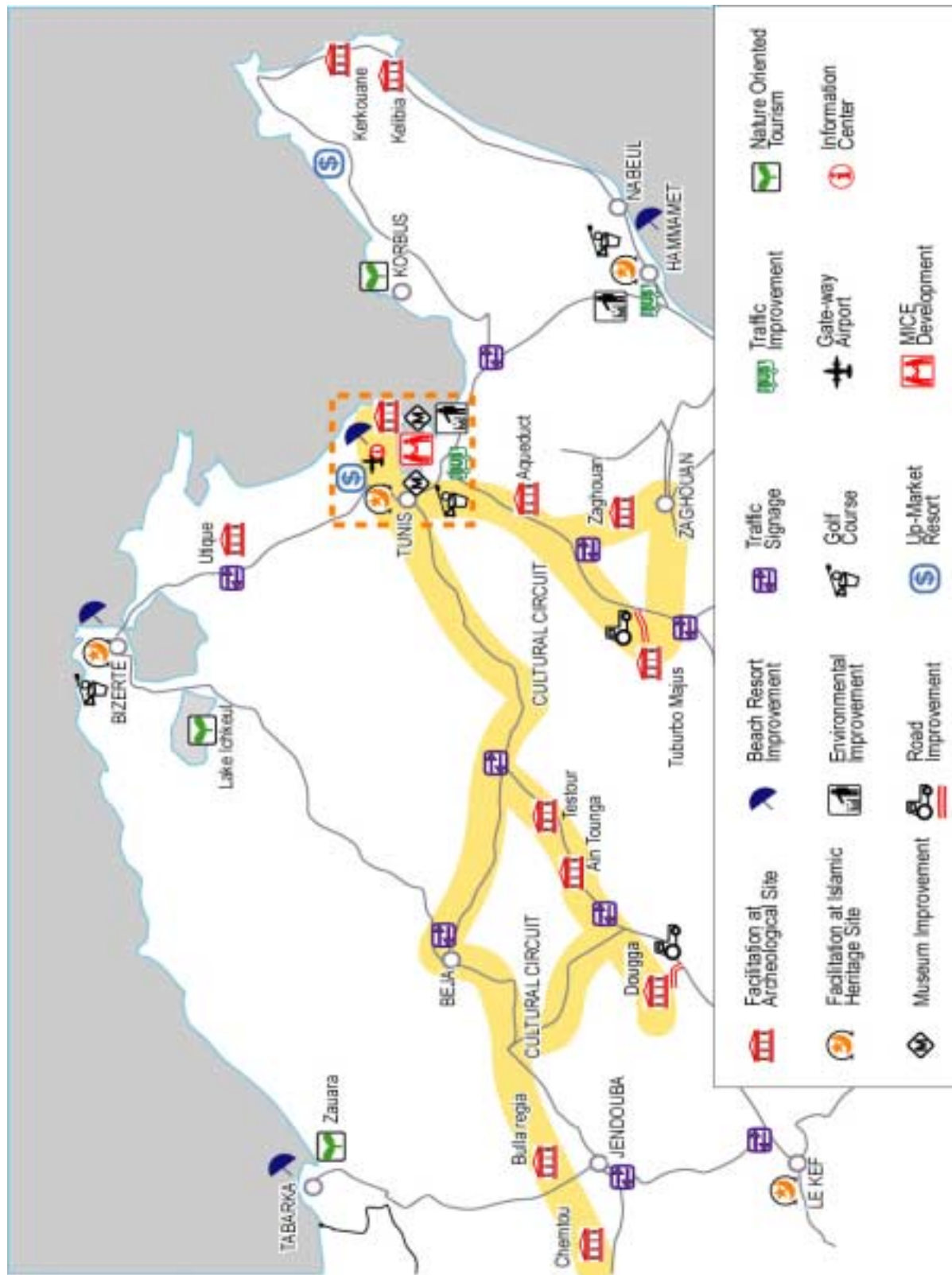
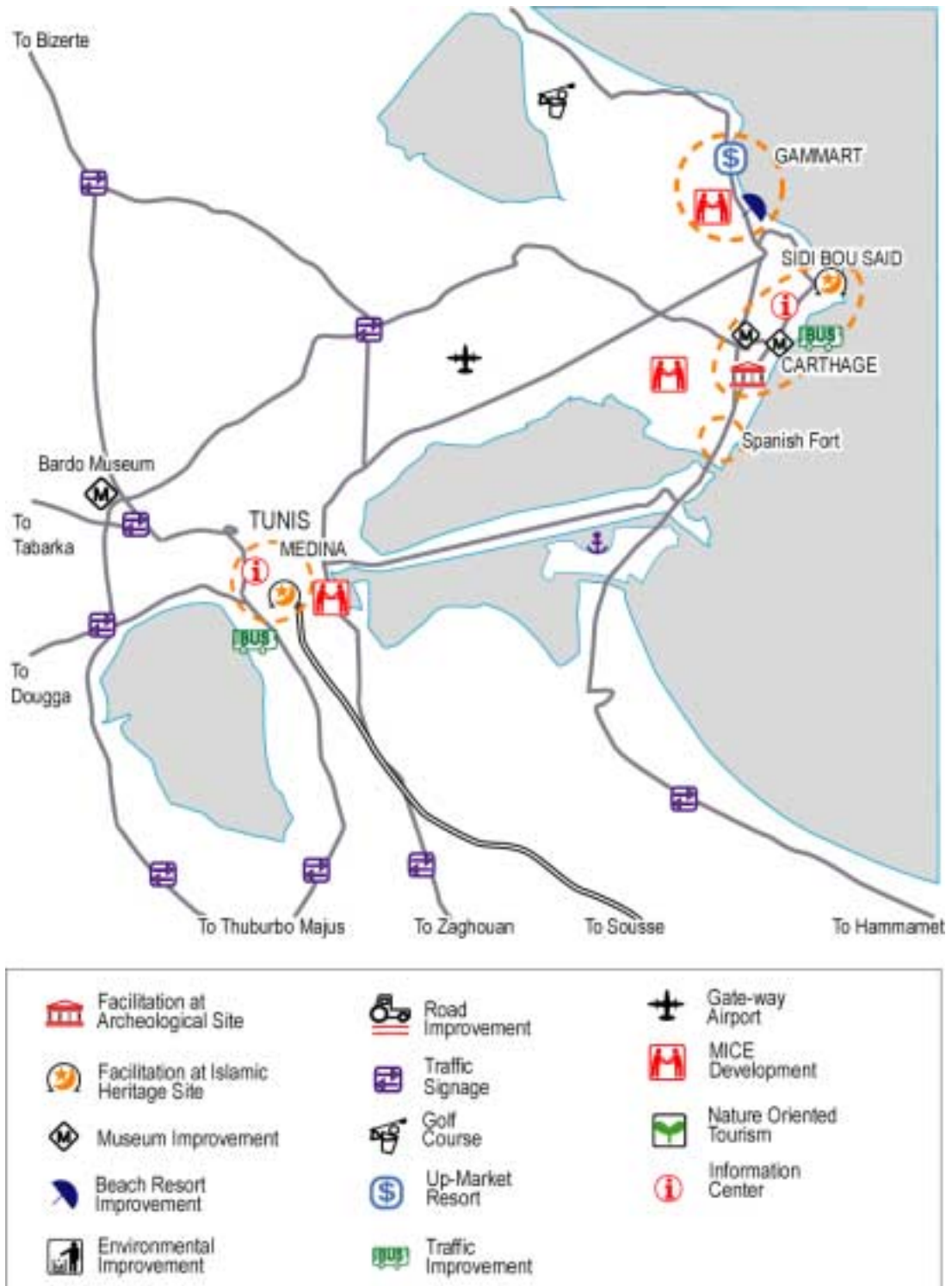


Figure 12.1.2 Spatial Development Plan of Greater Tunis Region (2/2)



Source: JICA Study Team

12.1.5 Product and Facility Development Plan

(1) Beach Holiday Tourism

- 1 Development of Up-Market Resorts
 - Development of up-market resorts in Gammarth, Cap Bon, etc.
- 2 Beautification of the existing Beach Resorts
 - Beautification of the existing beach resorts in Hammamet, Nabal, La Marsa, etc.
- 3 Development of Golf Course
 - Development of golf courses in Gammarth or other areas according to the increase of demand.
- 4 Development of Marina
 - Development of Marina in Tunis by transforming existing port.

(2) Cultural Tourism

- 1 Upgraded Visitor Facilitation and Presentation in Carthage
 - Provision of a visitor center of international standard with attractive interpretation of history and life of Carthage. This includes improvement of visitor facilitation at various sites in Carthage Archeological Park and training of visitor center staff and tour guides.
- 2 Creation of “Carthage Water Supply Museum”
 - The Carthage Water Supply Museum will be established by restoring Malga Cistern”. This museum will be used for tourist attraction purpose as well as environmental education purpose. This includes training of tour guides and curators.
- 3 Creation of Themed Cultural Circuits around Tunis
 - Creation and improvement of cultural circuits around Tunis (Bulla Regia, Thuburbo Majus, Utique, etc.) including provision of interpretative panels, tourist amenities, car parking, etc. This includes training of tour guides.
- 4 Establishment of a Visitor Center in Medina of Tunis
 - Establishment of a visitor center in Medina of Tunis near the main entrance gate.
- 5 Establishment of Art and Craft Center in Medina of Tunis
 - Establishment of an art and craft center in the heart of Medina of Tunis. This includes training of craftsmen and sensitization of shop keepers.
- 6 Upgrading of Bardo Museum
 - Upgrading of Bardo Museum to meet the international standard visitor facilitation and presentation. This includes training of curators.

(3) MICE and Urban Tourism

- 1 Development of MICE Tourism Promotion Plan
 - Preparation and development for MICE tourism promotion plan.
- 2 Development of World-Class Convention Centers
 - Development of meeting facilities and convention centers according to the increase of demand in close cooperation with TCB and other parties

concerned.

3 Development of Entertainment

- Development of more entertainment activities including dining-out, souvenirs, shopping, folklore dancing, casino, etc. by deregulation and incentives.

4 Panoramic Look Out over Medina of Tunis

- Development of look out where tourists can enjoy the panoramic view of Medina of Tunis.

(4) Nature Oriented Tourism

1 Development of Ichkeul National Park

- Development of visitor center and tourist trails in the park, which will serve for the protection purpose as well as tourism purpose. This includes training of rangers and sensitization seminars of local people.

2 Development of Hot Spring Resort in Cap Bon,

- Development of hot springs of world class combined with scenic landscape and Mediterranean beach in Cap Bon, etc.

(5) Accommodation Development

Table 12.1.3 Accommodation Capacity Requirement in Greater Tunis Region

	1999	2006	2011	2016
Visitor-Nights (millions)	2.3	2.9	3.5	4.4
Number of Beds (thousands)	18.1	21.8	24.9	29.0

Source: JICA Study Team

1 Construction of Hotels in the Urban Area and Tunis Suburb

- Additional accommodation will be constructed according the increase of the demand, particularly that of MICE tourism. 5-star hotels of international class will be more needed. Contracting with well-known international hotel chains is recommendable to attract more meetings through their own marketing device.
- For circular cultural tourism, good quality 3 to 4-satr hotels will be more needed.

2 Construction of Hotels in the Existing Tourist Zones (Hammamet, Nabal, etc.)

- Additional accommodation will be constructed according to the increase of the demand. Variety of types should be taken into consideration according to the clientele and services to be offered (all-inclusive, condominium, time-share, etc.).
- The guidelines of building should be reviewed to allow more attractive layout of the tourist zones, which is actually monotonous.

3 Development of New Tourist Zones

- Introduction of procedural reform to have competitive beach resorts. More innovative design, operation plan, investment plan, etc. will be needed for the purpose. The procedural reform should include

innovative proposals for each stage of the development. This requires participation of international expertise by competition basis.

- In addition to the conventional tourist zone development, smaller scale up-market resort development should be encouraged, which may need to be incorporated with natural environmental preservation. This type of development has good potential in the area of Cap Bon, in the mountain area of Mdjerda, le Kef, etc.
- 4 Improvement of Existing Hotels
- Service and facility upgrading of existing hotels. This includes staff training.

12.1.6 Infrastructure Development Plan

(1) Roads and Transport

a) Improvement of Tourist Traffic Congestion

- 1 Acceleration of Planned Tunis Ring Road Construction
 - Acceleration of improvement of the planned Tunis ring road including the undergoing bridge construction at La Goulette.
- 2 Acceleration of Underground Parking Construction in Tunis
 - Acceleration of construction of the planned large scale parking area in the downtown of Tunis and around the Medina.
- 3 Acceleration of Planned New METRO Construction
 - Acceleration of development of the planned new METRO lines in Tunis.
- 4 Development of Car Parking in Hammamet
 - Development of car parking along beach area in Hammamet.

b) Facilitation of Smooth Tourist Site Visit

- 5 Provision of Car Parking in Carthage
 - Construction of car parking for tourists and visitors.
- 6 Introduction of Trilingual Traffic Signage
 - Introduction of trilingual traffic signage (Arabic, French and English) along the road to the major tourist sites.
- 7 Access Road Improvement
 - Access road improvement at Dugga and Thuburbo Majus.
- 8 Introduction of Small Circular Coaches inside of Carthage
 - Introduction of small circular coaches inside of the Carthage Archeological Park and Sidi Bou Said

(2) Environment and Utilities

a) Upgrading of Attractiveness and Appeal

- 1 Rehabilitation of Medina of Tunis
 - Rehabilitation of Medina of Tunis to preserve distinctive characteristics of Islamic civilization.
- 2 Garbage Collection Improvement
 - Improvement of garbage collection and street cleaning at the major tourist sites and in Medina of Tunis
- 3 Aqueduct Restoration
 - Restoration of roman aqueduct and utilization for tourism and environmental education.
- 4 Street Beautification
 - Improvement of tourist roads including beautification, gardening, roads furniture, public lighting, etc., particularly, on the roads between the Tunis-Carthage.
- 5 Beachfront Beautification
 - Beautification of beachfronts in Gammarth, La Marsa, and Hammamet,

etc.

- 6 Replacement of Overhead Wiring in Median
 - Replacement of overhead wiring (power, telephone) with underground cables in the historical districts and Medina of Tunis.
- 7 Replacement of Television Antennas
 - Replacement of television antennas with centralized cabled capturing system in the historical districts and Medina. This system can include the multimedia such as Internet, which will be significant incentive for the private investors for the purpose of revitalization of the historical districts.
- 8 Beautification of Existing Parks
 - Improvement and beautification of the existing parks in Tunis, Carthage and around to meet the needs of resident visitors as well as non-resident visitors.
- 9 Increased Incentives for Cultural Heritage Restoration
 - Provision of incentives for the restoration and utilization of cultural heritage and historical buildings for tourism or commercial purpose (in addition to the existing soft loan for own habitation purpose).

b) Upgrading of Utilities and Environmental Consideration

- 10 Provision of Tourist Amenity
 - Provision of tourist amenity including toilet, rest facilities, etc.
- 11 Introduction of Recycled Water
 - Introduction of recycled water system in large-scale hotels and facilities.

12.2 CENTRAL REGION DEVELOPMENT PLAN

12.2.1 Potentials and Constraints

This region has been developed mainly as a major beach tourism core of Tunisia, with the Monastir Airport as a gateway. Combined with Monastir, this tourism core attracts the largest number of foreign tourists in the country, while it suffers from a significant seasonal fluctuation of demand as the region depends mainly on rather cheap mass beach tourism.

Table 12.2.1 Main Characteristics of the Central Region

Sousse-Kairouan	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	1,094,708	17.9	85% of that in Jerba-Z
Non-residents	948,917	18.5	83% of that in Jerba-Z
Length of Stay (nights)	8.4	131	Relative to the national average
Total visitor nights	8,332,960	23.6	97% of that in Jerba-Z
Non-residents	8,003,173	24.1	96% of that in Jerba-Z
International passengers at Monastir Airport	3,597,536	41.4	Both arrivals and departures, Highest of all the airports
Seasonal fluctuation: Factor (1)(%)	28	95	Relative to the national average
Factor (2)(%)	60	98	Relative to the national average
Bed occupancy rate (%)	61.3	109	Relative to the national average
Monastir-Mahdia-Sfax	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	848,188	13.8	66% of that in Jerba-Z
Non-residents	702,021	13.7	61% of that in Jerba-Z
Length of Stay (days)	8.1	127	Relative to the national average
Total visitor nights	5,983,078	16.9	69% of that in Jerba-Z
Non-residents	5,655,048	17.1	68% of that in Jerba-Z
International passengers at Sfax Thyna Airport	32,008	0.4	Both arrivals and departures
Seasonal fluctuation: Factor (1)(%)	23	81	Relative to the national average
Factor (2)(%)	62	101	Relative to the national average
Bed occupancy rate (%)	63.7	113	Relative to the national average

Note: Factor (1) = Lowest of monthly hotel registration (arrivals) / highest of monthly registration

Factor (2) = Average monthly hotel registration (arrivals) / highest of monthly registration

Source: ONTT, Le Tourisme Tunisien en Chiffres, 1999, and the Ministry of Transport

Table 12.2.2 Results of Interview Surveys relevant to the Central Region

Item	Results	Remarks
El Jem visitors among those stayed at each major beach resort for 3 nights or more	Sousse: 27.4% Hammamet: 18.1% Jerba: 9.4%	Visited by many of longer-stay beach tourists as well as by circuit tourists
% of visitors to El Jem rated "GOOD" for	Value: 73%; Interpretation: 44%; Signage/Facilities: 43%	The level of tourist satisfaction can be greatly enhanced with quality facilities and better interpretation.
The maximum amount that European tour operators interviewed think acceptable to pay for El Jem with the current condition	Less: 1 operator TD 5.0: 5 operators TD 7.5: 1 operator (Among 8 operators interviewed)	The European tour operators interviewed value El Jem at TD5 per visitor at maximum (equal to the current entrance fee).
Other Critical Comments of European tour operators relevant to the Sousse-K Region	"Tunisia should promote its rich cultural heritage more, besides its sea-sun-sand destinations." "Kairouan has very limited hotel capacity."	The first point (the need for promoting cultural tourism) was raised by most of the tour operators interviewed.

Source: JICA Study Team (based on the tourist interview survey conducted in July and August 2000 and the tour operator interview survey)

Besides beaches, this region possesses rich cultural resources in the inland area as well as along the coast. Kairouan as a focal point of Islamic culture and history in the Maghreb and the Colosseum of El Jem are the two monumental sites in the region. Although these are part of most circuit tours covering major cultural sites of the country, and are visited by a number of beach holiday vacationers, both are significantly underdeveloped, satisfying far less than should. In particular, the number of visitors to Kairouan is much less than that for El Jem despite its historical importance (according to the comparison of available statistic data).

The region possesses the following potentials:

- 1 Good potentials for development of a world-class cultural tourism product out of the two monumental sites of Kairouan and El Jem, currently far under developed to meet up with the needs of today's discerning visitors, whether on a themed cultural circuit or on an optional short excursion,
- 2 Good potentials for development of more satisfying site visit in Sousse, Monastir and Mahdia by provision and improvement of visitor facilitation measures (signs, interpretation, amenities of international standards, etc.),
- 3 Good potentials for adding a new complementary destination of different character in Kerkenah Islands, with focus on nature and eco-tourism as well as its unique traditional way of life (fishing, sea sponge, etc.), and
- 4 Long-term potentials of developing an additional cultural product out of Thapsus (the largest Punic necropolis, Roman ruins including a small scale colosseum) near Ksar Hellal between Monastir and Mahdia, subject to further academic excavation and research, together with nearby Lemta (Leptus Minus) provided with a relatively modern small scale museum), etc.

12.2.2 Development Concept

The goal of the tourism development of this region is to up-grade the beach resort with sufficient service and facility level as well as with diversified activities and excursions on offer.

The overall tourism development concept of this region by the year 2016 is to increase its competitiveness, profitability and durability by the following strategies.

(1) Culture

- To establish Kairouan and El Jem as world-class cultural destination by improving their presentation and visitor facilitation up to those of international standards,
- To develop its abundant potential resources so as to diversify its tourism products.

(2) Quality

- To develop various complementary products of world-class (golfing, yachting, MICE and incentive tours, shopping, souvenirs, dining out, entertainment, etc.) to increase the value of the existing tourism cores,
- To improve one of the three major beach tourism cores in Tunisia, with increased importance as development progress and capacity increase particularly in Mahdia, by both physical improvement and staff training,
- To introduce procedural reform to create more competitive up-market beach resorts vis-à-vis a fierce competition of the world tourism market place.

(3) Environment

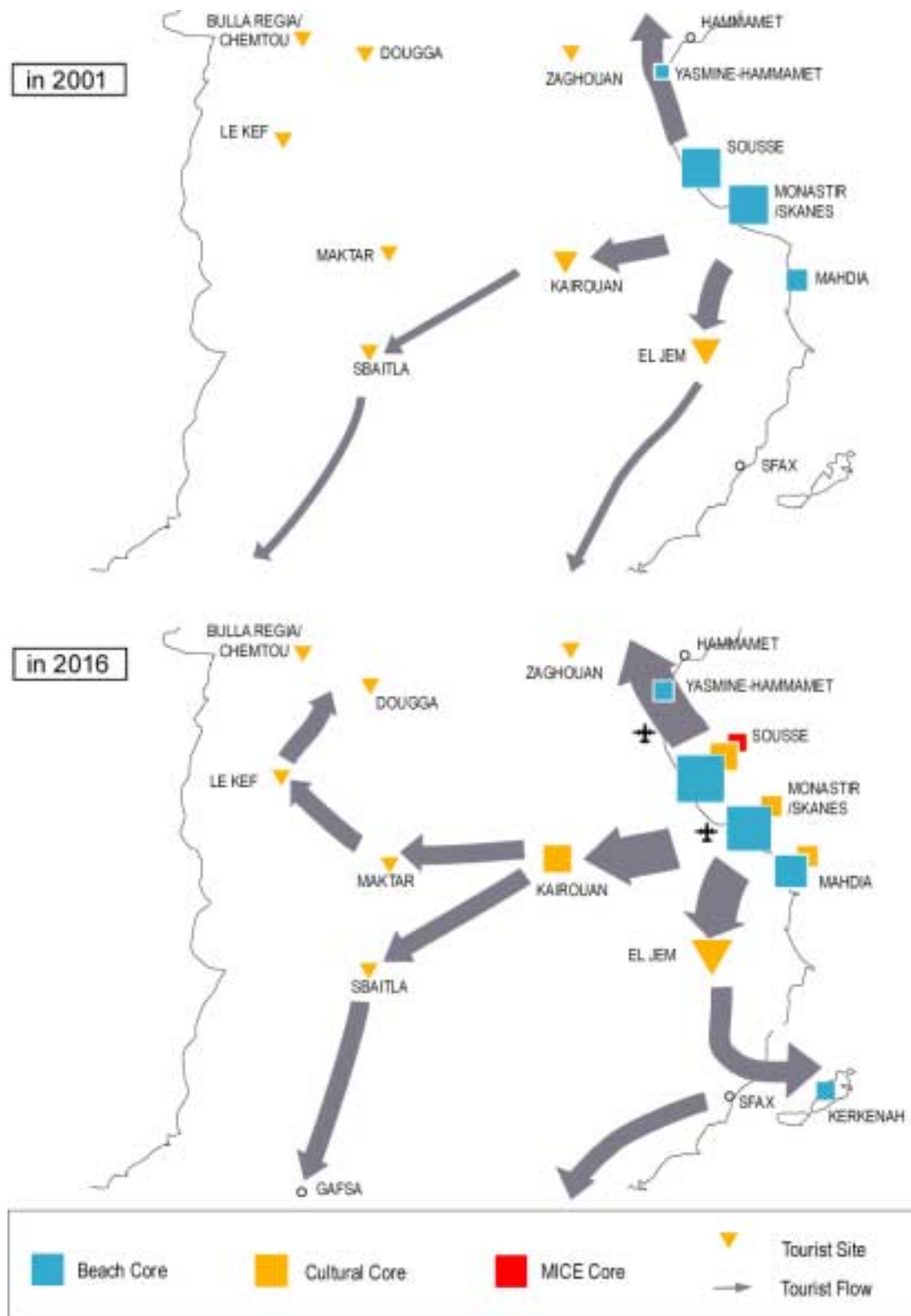
- To protect and manage natural environment so as to meet the needs for up-market beach resorts,
- To rehabilitate historical Medinas,
- To develop eco-tourism in Kerkenah Islands for a new tourism experience of nature and ecology combined with traditional way of life.

12.2.3 Target Markets

- 1 Beach holiday tourists from Europe including the emerging markets of Eastern Europe, Russia, CIS countries to the beach areas of Sousse, Port El Kantaoui, Skanes, Monastir and Mahdia (Moderate Increase, except for the emerging markets),
- 2 Senior tourists from Europe on an affordable winter off-season package (Good Potentials subject to effective promotion),
- 3 Incentives and seminars, combined with leisure and relaxation (beach, golfing, yachting) from Europe (Good Potentials for up market and/or high spender clientele, subject to effective promotion),
- 4 Visitors focused on sportive relaxation (yachting, golfing) (Moderate Increase),
- 5 Tourists from industrialized countries including North America and East Asia on themed circuits of archeological, cultural or Saharan discovery experiences for one or two-nights stop (Increasing and Good Potentials), and
- 6 Religious visitors from neighboring Maghreb or other Islamic countries to Kairouan or Mahdia, etc. (Moderate Increase).

Figure 12.2.1 illustrates the development concept including the major target market segments and their flow, in comparison with the existing situation (in 2001) and the situation in 2016.

Figure 12.2.1 Development Concept of Central Region



Source: JICA Study Team

12.2.4 Spatial Development Plan

Figure 12.2.2 illustrates the spatial development plan of the Central Region in the year 2016.

This is the heartland of the nation's beach capacity, where large-scale development originally started. Key considerations include the broadening types of lodging that the marketplace will offer, the urban development pattern in and around the Sousse-Kantaoui area, and the changing environment in the medinas, the region's key cultural resource. ONTT will need to cope with these and other such considerations in the short and long term.

(1) Urban Beachfront Development

Urban patterns in resort areas will become more varied. Developers will build vacation units on cheaper land at some distance from the beachfronts. At Sousse and El Kantaoui developers will find mechanisms to market capacity on plots at a distance from the beachfront with good views (golf courses, mountains). As Sousse grows further in popularity, developers may seek higher building rights for denser projects (c.f. Benidorm in Spain, Hawaii USA). ONTT must assist municipal officials in determining the maximum acceptable densities all things considered (including the *plans d'aménagement urbain*). The model of the high-rise seafront resort is one that the town of Sousse can seriously consider in view of its marketability in Spain and other countries.

(2) Broadening Variety of Accommodation

As has happened at other resort areas of the Mediterranean (Costa Brava, Balearic Islands, Greece) the marketplace will naturally diversify the lodging offer both in physical types, and legal forms. Apartment-hotels (condominiums), villas and town houses will become more common, referred to as self-catering types of lodging. Non-traditional legal formulas including timeshare, interval sales, seasonal and annual leasing and club memberships will grow more common. ONTT investment department will need to be familiar with the operators of these non-traditional types of resort capacity to advise Tunisian developers about them.

(3) Marina as Stimulus

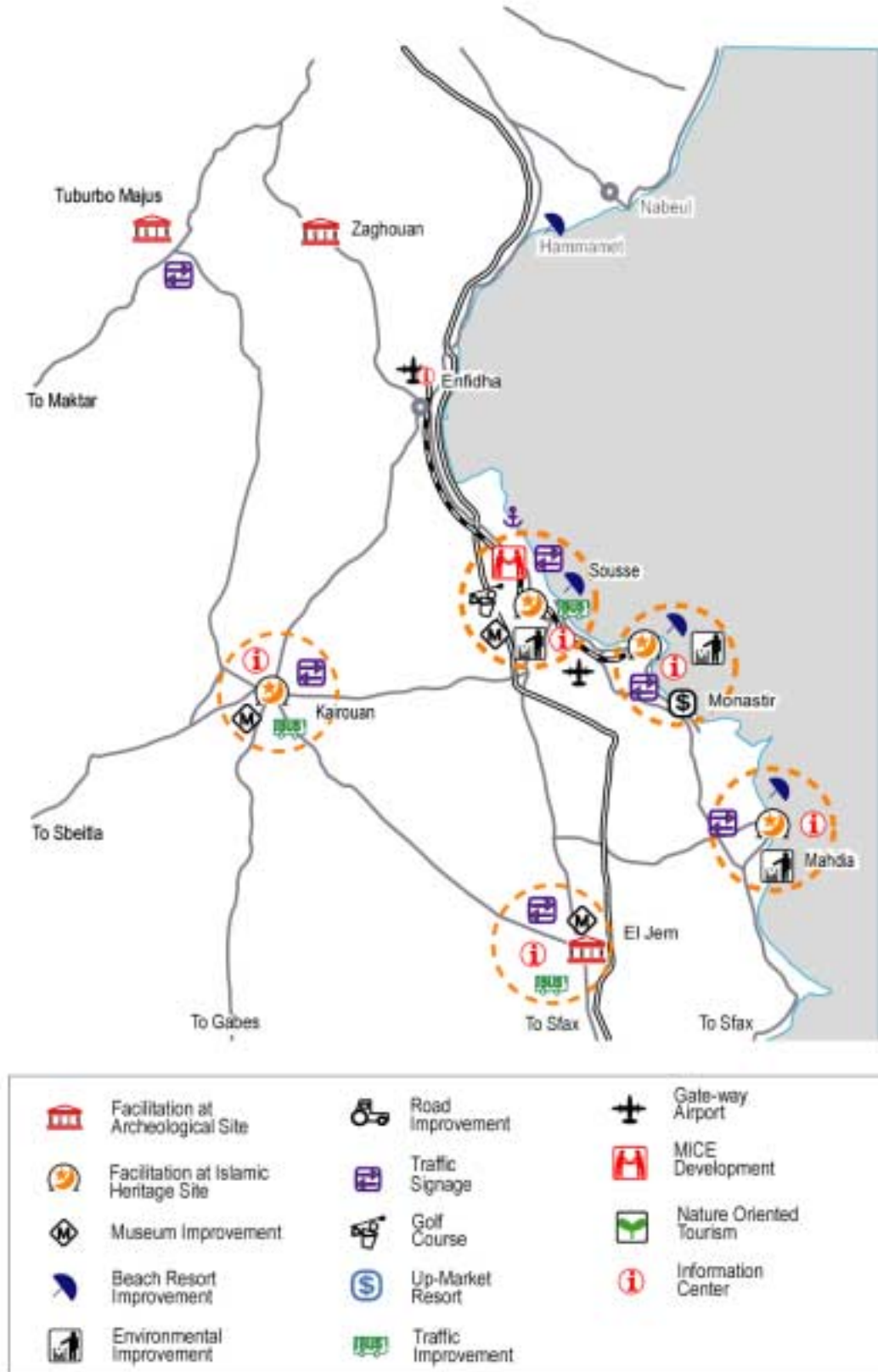
There are many examples of Mediterranean resort towns settled around one or more marinas and beaches, El Kantaoui being one of them. The marina serves as a value-adding urban amenity, a focal pole for retail, dining and entertainment. ONTT must encourage European know-how in the design of new marinas in Tunisia, or in the major upgrading of existing ones to stimulate the surrounding strong urban development. Features such as lagoons, canals, inlets and waterfronts add cost to urban infrastructure. However, when well done they stimulate high-quality urban development that can bear the higher cost. International expertise in design, marketing and management of seaside resort communities is needed to strengthen the product and market it aggressively to European populations. ONTT and AFT must promote collaborations between Tunisian

designers and developers with foreign counterparts that will produce more creative designs and more marketable resort capacity in competition with Italian, Sardinian, Maltese and Spanish resorts.

(4) Environment of the Medinas

A main strategy of this plan is to use the cultural product to add value to the beach product so the sustainable development of the medinas is indispensable. The old quarters of Sousse, Kairouan, Mahdia and Monastir will undergo increasing commercial development. Consequently, the building codes governing esthetic aspects need to be strengthened and enforced with owners. Without good enforcement building features like air conditioners, television antennas, advertising and neon signs, will mar the old world character that adds the value and draws the visitors. ONTT must encourage the strengthening of ASMs for the enforcement and control function in each of these towns in the interest of long-term sustainability.

Figure 12.2.2 Spatial Development Plan of Central Region



Source: JICA Study Team

12.2.5 Product and Facility Development Plan

(1) Beach Holiday Tourism

- 1 Development of Up-Market Resorts
 - Development of up-market resorts in Skanès Monastir, etc.
- 2 Beautification of the existing Beach Resorts
 - Beautification of the existing beach resorts in Sousse, Monastir, Mahdia, etc.
- 3 Development of Golf Course
 - Development of golf courses in Sousse or other areas according to the increase of demand.

(2) Cultural Tourism

- 1 Upgraded Visitor Facilitation and Presentation at Kairouan
 - Provision of visitor centers of international standard in Kairouan, Sousse, Mahdia, Sfax, Monastir, etc. with attractive interpretation of history. This includes training of visitor center staff and tour guides.
- 2 Creation of Tourist Attraction at El Jem
 - Creation of cultural attraction and improvement of visitor facilitation at El Jem. This includes improvement of presentation and creation of Sound and Light show.
- 3 Establishment of a Visitor Center in Medina of Kairouan and Mahdia
 - Establishment of a visitor center in Medina of Kairouan near the main entrance gate.
- 4 Creation of Themed Circuits
 - Creation and improvement of cultural circuits in the region including, Kairouan, El Jem, Sbeitla, Mahdia, Sfax, etc.
- 5 Establishment of Islamic Art Museum in Medina of Kairouan
 - Establishment of an Islamic art museum in the Medina of Kairouan. This includes training of tour guides and curators.
- 6 Upgrading of Sousse Museum
 - Upgrading of Sousse Museum to meet the international standard visitor facilitation and presentation.

(3) Urban Tourism

- 1 Development of MICE Tourism Promotion Plan
 - Preparation and development for MICE tourism promotion plan.
- 2 Development of Entertainment
 - Development of more entertainment activities including dining-out, souvenirs, shopping, folklore dancing, casino, etc. by deregulation and incentives.

(4) Nature Oriented Tourism

- 1 Development of Eco-Tourism in Kerkenah Island
 - Development of visitor center and tourist trails in the island, which will

serve for the protection purpose as well as tourism purpose. This includes training of rangers and sensitization seminars of local people.

- 2 Development of Water Sports,
 - Development and promotion of nature-oriented water sports in the region. This includes training of sports instructors and sensitization of local people.

(5) Accommodation Development

Table 12.2.3 Accommodation Capacity Requirement in Central Region

	1999	2006	2011	2016
Visitor-Nights (millions)	8.3	12.2	15.2	18.4
Number of Beds (thousands)	40.4	56.7	68.4	80.6

Source: JICA Study Team

- 1 Construction of Hotels (Sousse, Monastir, Mahdia, Sfax, etc.)
 - Additional accommodation will be constructed in the urban area or in the existing tourist zones according to the increase of demand. Variety of types should be taken into consideration according to the clientele and services to be offered (all-inclusive, condominium, time-share, etc.).
 - For circular cultural tourism, good quality 3 to 4-star hotels will be more needed.
 - The guidelines of building should be reviewed to allow more attractive layout of the tourist zones, which is actually monotonous.
- 2 Development of New Tourist Zones
 - Introduction of procedural reform to have competitive beach resorts. More innovative design, operation plan, investment plan, etc. will be needed for the purpose. The procedural reform should include innovative proposals for each stage of the development. This requires participation of international expertise by competition basis.
- 3 Improvement of Existing Hotels
 - Service and facility upgrading of existing hotels. This includes staff training.

12.2.6 Infrastructure Development Plan

(1) Road and Transport

a) Improvement of Tourist Traffic Congestion

- 1 Development of Car Parking in Sousse, Monastir and Mahdia
 - Development of car parking along beach resort area in Sousse, Monastir and Mahadia.
- 2 Road Development between Future Airport and “Autoroute”
 - Development of access road between the planned international airport of Enfidah, and the expressway and the national road No.1.
- 3 Development of Transit System between Future Airport and Sousse
 - Development of transit system from the planned international airport of Enfidah to railway or Metro mode for connection to Sousse.

b) Facilitation of Smooth Tourist Site Visit

- 4 Provision of Car Parking at Tourist Sites
 - Provision of car parking at the major tourist sites such as the Sousse meseum, Kairouan and El Jem, etc.
- 5 Introduction of Tourist Circular Bus between Sousse and Kairouane
 - Introduction of tourist circular bus services among Sousse, Kairouan and El Jem.

(2) Environment and Utilities

a) Upgrading of Attractiveness and Appeal

- 1 Rehabilitation of Medinas of Kirouan, Sousse, Mahdia
 - Rehabilitation of Medinas of Kairouan, Sousse, Mafdia, Sfax, etc. This includes sensitization of local people.
- 2 Garbage Collection Improvement
 - Improvement of garbage collection and street cleaning at the major tourist sites and in Medina of Sousse, Kairouan.
- 3 Street Beautification
 - Beautification of beachfrons in El Kantaoui, Sousse, Monastir and Mahadia, etc.
- 4 Increased Incentives for Cultural Heritage Restoration
 - Provision of incentives for the restoration and utilization of cultural heritage and historical buildings for tourism or commercial purpose (in addition to the existing soft loan for own habitation purpose).
- 5 Beachfront Beautification
 - Beautification of beachfronts in Sousse, Monastir, Mahdia, etc.
- 6 Street Beautification
 - Improvement of tourist roads including beautification, gardening, roads furniture, public lighting, etc., particularly, on the roads between the Sousse-Mahdia, etc.

b) Upgrading of Utilities and Environmental Consideration

7 Provision of Tourist Amenity

- Improvement of tourist amenity including toilet, rest facilities, etc. at the major tourist sites such as Kairouan, El Jem, etc.

8 Introduction of Recycled Water

- Introduction of recycled water system in large-scale hotels and facilities.

12.3 SOUTHWEST REGION DEVELOPMENT PLAN

12.3.1 Potentials and Constraints

The Gafsa-Tozeur tourism region that corresponds to the Saharan region, thanks to its natural tourism resources, attracts about 752,000 foreign visitors in terms of the number of hotel registration (in 1999), 66% of those in the Jerba-Zarzis Region (Table 12.3.1). Currently, however, the region is viewed merely as one of the several destinations visited by circuit tourists, not a primary destination, with a very short average length of stay of 1.4 day. International passengers (both arrivals and departures) at the Tozeur-Nefta airport are about 72,000 in 1999, only a small fraction of the visitors to the region. In addition, the region is currently not attractive enough to most of the beach holiday vacationers as suggested by Table 12.3.2, even to those at Jerba.

As the Zarzis-Gabes sub-regions that correspond to the Berber region are defined as a part of Jerba-Zarzis tourism region, no independent statistical data are available. Comparing with the tourist zones in Jerba Island, the Berber region has very few hotels, and the average length of stay is assumed to be much shorter than those of beach resort hotels (Table 12.3.1).

Table 12.3.1 Main Characteristics of Southwest Region

Gafsa-Tozeur region	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	842,579	13.8	66% of that in Jerba-Z
Non-residents	752,135	14.6	66% of that in Jerba-Z
Length of Stay (nights)	1.4	22	Relative to the national average
Total visitor nights	1,213,560	3.4	14% of that in Jerba-Z
Non-residents	1,054,990	3.2	13% of that in Jerba-Z
International passengers at Tozeur Airport	72,185	0.8	Both arrivals and departures
Seasonal fluctuation: Factor (1)(%)	36	124	Relative to the national average
Factor (2)(%)	63	102	Relative to the national average
Bed occupancy rate (%)	35.9	63.5	Relative to the national average
Zarzis-Gabes sub-regions	Number in 1999	% of Country Total	Remarks
Total hotel registration (arrivals)	238,400	3.9	19% of that in Jerba-Z
Non-residents	-	-	
Length of Stay (days)	-	-	
Total visitor nights	914,615	2.6	11% of that in Jerba-Z
Non-residents	-	-	
International passengers at Jerba-Zarzis Airport	1,868,606	21.5	Both arrivals and departures, 52% of those at Monastir Airport

Note: Factor (1) = Lowest of monthly hotel registration (arrivals) / highest of monthly registration

Factor (2) = Average monthly hotel registration (arrivals) / highest of monthly registration

Source: ONTT, Le Tourisme Tunisien en Chiffres, 1999, and the Ministry of Transport

Table 12.3.2 Visitors to Tozeur among Visitors Stayed in Other Regions

	Jerba	Sousse	Hammamet	Tunis
Tozeur visitors among those who stayed at each for 3 nights or more	7.3%	3.9%	5.7%	4.2%

Source: JICA Study Team (based on the tourist interview survey conducted in July and August 2000)

The Southwest region should be developed and transformed into a primary tourist destination through the development of new products and product diversification, thereby benefiting the tourism industry (currently suffering from a low level of occupancy) as well as contributing to the regional development.

In addition, the Berber region has remarkable potential to be developed into, at least, secondary tourist core from the current side-stop site. Many important tourist guidebooks such as “Guide Blue”, “Michelin”, “Lonely Planet”, etc. give high evaluation and spend many pages to mention its distinctive culture, especially its illustrious buildings.

The Southwest region possesses the following potentials:

- 1 Good potential for development of characteristic accommodations (hotels of local character, tent, etc.) in the mountain oasis targeted for up-market, themed circuit, incentive-seminar clientele for extended visitor-nights in the region,
- 2 Good potentials for development of more diversified variety of nature walks, trails for flora and fauna, geography, geology combined with cultural, historic and folk life interests) in mountain oasis, Selja valley, Chott-El-Jerid, etc.,
- 3 Good potential for development of distinctive circular tourist routes with Ghorfas and Ksars combined with picturesque scenery of the region, and
- 4 Good potential for combined tourism product of the Southern Tunisia being made up of various types of resources and activities, and being close to another tourist core of Jerba Island.

12.3.2 Development Concept

The goal of the tourism development in the Southwest region is to establish it as one of the tourism cores of Tunisia, thus add a new image of the Tunisian tourism. A successful promotion of this region will drastically increase the number of visitors and their contribution to the local economy.

The overall tourism development concept of this region by the year 2016 is to increase its competitiveness, profitability and durability by the following strategies.

(1) Sahara

- To establish the Tunisian Sahara as the star destination of Tunisia in the world tourism market place particularly for lucrative markets of incentives, winter hibernation, senior tourists, week-end tourists, etc. from nearby Europe,
- To develop Matmata and Tataouine as its own secondary tourism core to showcase Tunisia's unique traditional habitat and way of life,
- To develop abundant scenic, natural and cultural resources around Tozeur, Douz, Matmata, Tataouine, etc. for unique Saharan experience as well as traditional life and customs of Berber, and
- To develop and promote attractive themed tour circuits, and soft adventure, various sports activities, cycle tourism, trekking, etc. combined with distinctive characteristics of the region.

(2) Quality

- To develop complementary sources of visitors by seasons, optional visitors from beach cores in summer and incentives or hibernation in winter, and
- To develop up-market resorts of the world class in the selected areas of mountain oasis, scenic valleys, desert areas, etc.

(3) Environment

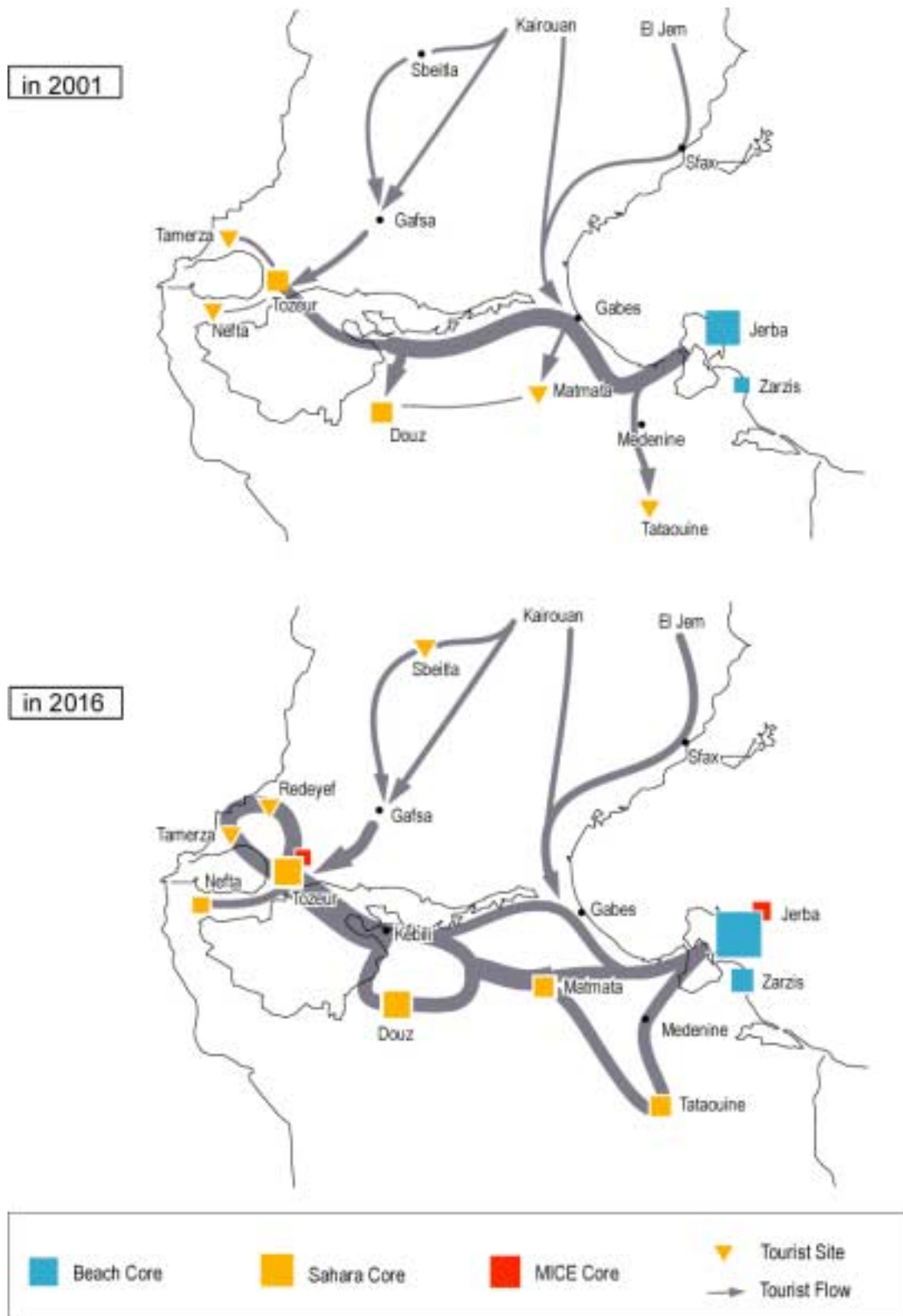
- To protect and manage fragile natural environment so as to meet the expectation of visitors,
- To rehabilitate and beautify oasis,
- To conserve water consumption and to introduce more recycled water.

12.3.3 Target Markets

- 1 Beach holiday tourists in the tourist cores of Jerba, Sousse and Monastir for optional Sahara experiences (Major Existing Inflow, Moderate Increase),
- 2 Incentives and Seminars from Europe (Increasing and Greater Potentials),
- 3 Hibernation and senior tourists from Europe (Increasing and Greater Potentials),
- 4 Tourists from industrialized countries including North America and East Asia on themed circuits of Saharan experiences, mountain oasis, etc. for one or two-nights stop (Increasing and Good Potentials), and
- 5 Week-end tourists from Europe seeking a short and handy, but exotic North African or Saharan exposure at an affordable and competitive package. (Good Potential subject to airline initiatives, flight operation and availability).

Figure 12.3.1 illustrates the development concept including the major target market segments and their flow, in comparison with the existing situation (in 2001) and the situation in 2016.

Figure 12.3.1 Development Concept of Southwest Region



Source: JICA Study Team

12.3.4 Spatial Development Plan

Figure 12.3.2 illustrates the spatial development plan of the region.

The work of ONTT as shepherd for tourism is mainly to promote action by other agencies to facilitate the creation of tourism-related enterprises.

(1) Models of Desert Development

For the twin south basins centered on Matmata-Tataouine and on Tozeur-Nefta, one can consider two very interesting and different models of desert resorts. Examples come from the American southwest in towns such as Havasu City, Sedona and Palm Springs, all small towns drawing large numbers of tourists and resident retirees seeking the healthy pollen-free desert air, a slow pace of life and the warm winter seasons. The accent is on healthy sports, sweeping panoramas, and enjoyment of old Mexican and Navajo cultures particularly through their artwork and handicrafts. For natural and cultural reasons these areas offer a high quality of life that older people seek. Other towns in Mexico offer the same comforts, and also attract American vacationers and retirees. With its proximity to Europe, Tunisia's Great South offers much the same appeal.

Another desert model is represented by the tremendously successful Sun City in South Africa or Las Vegas USA, both focusing on amusements and entertainment for young and old, 24-hours a day. Beirut is an Arab city fulfilling a similar amusement function. Again the ready proximity to Europe makes this model appealing, and as the awareness in Europe of Tunisia's southern attractions grows, the Great South can earn its place in the European marketplace as the closest and most fun Saharan playground.

The variety of measures proposed for the south in this National Plan support both of these models. ONTT can continue to promote investment in new opportunities for sports and entertainment in the south and use such models in assisting developers in project formulation for the long-term. This is a major opportunity awaiting a North African destination, one which Tunisia's south can fully exploit. Towns like Luxor and Marrakech come to mind as other such candidates.

(2) Ease of Securing Land for Private Projects

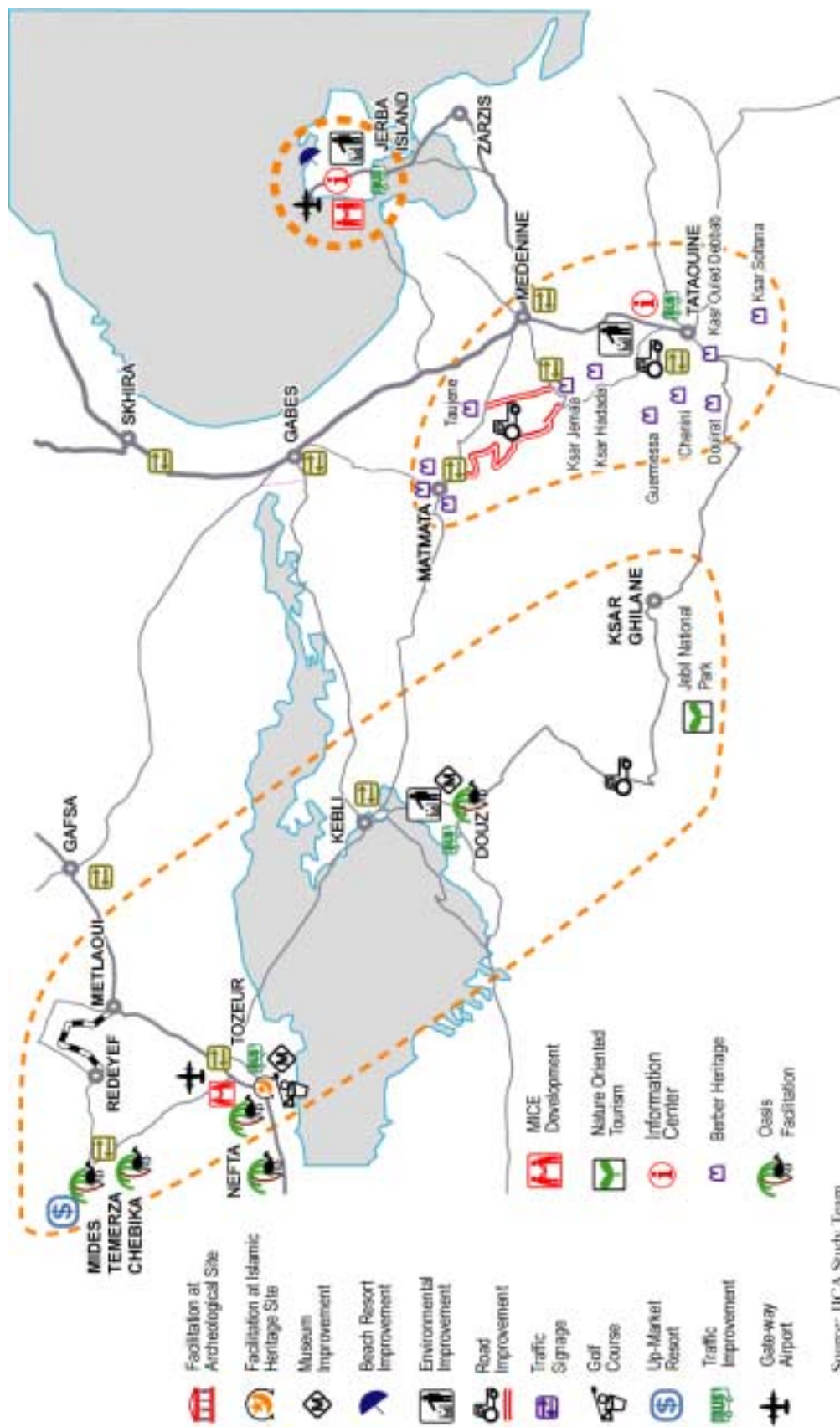
If the south is to develop as a popular vacationing region for cultural tourism and for long stay tourism, developers must expand its offer of sporting facilities (tennis, golf, swimming pools) shopping and entertainment options. Private developers will need to buy large tracts of land to build resorts, shopping centers, country clubs and apartment developments, possibly even a private airport. ONTT and investment promotion authorities must encourage partnerships between Tunisian and European developers to tap into European design expertise and marketing channels. Where legal problems securing title to land arise, AFT can assist developers to quickly resolve ownership-related problems.

(3) National Parks Development

A major opportunity requiring careful land management by MEAT and MA is the creation of natural parks, one at Jbil which is already planned, and another in the Chebika-Redeyef mountain range north of Chott El Fejaj. ONTT can assist these authorities in preparing Jbil with infrastructure for different types of trekking across the Jbil region, being a perfect region for the growing European eco-tourism market.

A much more accessible area is the scenic mountain range east of Chebika having two existing roads with spectacular panoramas, one having served as the desert fox General Rommel's escape route during World War II. This is another area well-suited to adventure and nature-based activities, requiring a layer of visitor services and park management features. Not all parks or protected areas are relevant to international tourism, but these two are. For this reason this report recommends clear ONTT action to push for clear territorial definition and protection before 2006, and full installation of facilities (visitor centers, access roads, food and lodging, et cetera) before 2011.

Figure 12.3.2 Spatial Development Plan of Southwest Region



Source: JICA Study Team

12.3.5 Product and Facility Development Plan

(1) Saharan Tourism

a) Sahara Core Area

- 1 Airport Information Center
 - Improvement of the gateway tourist information center at the airport. This includes training of staff.
- 2 Sahara and Oasis Museum
 - Establishment of a Sahara and Oasis Museum in Tozeur. This includes curator training.
- 3 Desert Sports Promotion
 - Development and promotion of various sports around Tozeur and Douz. This includes training of guides and sports instructors, and incentive measures for the local enterprises.
- 4 Sahara Trekking Center with Field Museum in Douz
 - Development of camel riding and trekking center as well as a field museum in Douz. This includes staff training.
- 5 Development of Oasis Agro-Tourism
 - Development of agro-tourism in the oasis by providing model farms to demonstrate how the traditional agriculture used to be.

b) Berber Core Area

- 6 Ksars and Ghorfas visitor center in Tataouine,
 - Introduction of general background, history, distribution of ksars and ghorfas in the region, with audio-visual technology. This includes staff training.
- 7 Development of Ksars and Ghorfas
 - Restoration of .ksars and ghorfas and development for the tourism use. This includes establishment of cooperative body for the operation.

c) Common

- 8 Souvenir Development
 - Development of distinctive souvenirs and training of craftsman. This includes incentive measures for the local enterprises.
- 9 Development of Entertainment and Folklore
 - Development of folklore dancing by integration of traditional dances and modern taste.
- 10 Development of Spa
 - Development of spa resorts around Sahara and Berber regions.
- 11 Creation of Themed Circuits
 - Creation and improvement of Saharan and cultural circuits in the region including, Tamerza, Nefta, Seldja, Matmata, Ksars and Ghorfas, etc.
- 12 Development of Up-Market Resorts
 - Development of up-market resorts with scenic landscape in the region.

(2) Nature Oriented Tourism

- 1 Development of Cycle Tourism
 - Development and promotion of cycle tourism in and around the oasis. This includes technical assistance to the local tour operators for marketing and promotion in European countries.
- 2 Development of Environmental-Friendly Golf Course
 - Development of golf courses in Tozeur in an environmental-friendly manner.
- 3 Development of Camel Trekking in Douz
 - Development of Camel trekking including upgrading of supporting facilities such as showers, toilets, etc.
- 4 Jbil National Park
 - Development of Jbil National Park. This includes training of rangers.

(3) Accommodation Development

Table 12.3.3 Accommodation Capacity Requirement in Southwest Region

	1999	2006	2011	2016
Visitor-Nights (millions)	1.2	1.9	2.9	4.4
Number of Beds (thousands)	10.2	11.7	14.1	19.2

Note: Matmata and Tataouine are not included in the above table.

Source: JICA Study Team

Although suspension of accommodation capacity expansion is recommended before the occupancy rates in the region will be improved, the following accommodation development should be undertaken in order to meet the expectations of tourists.

- 1 Local Character Accommodation Development
 - Development of local color or character up-market accommodation development, which should harmonize with the existing landscape: e.g., Tamerza Palace in Tamerza, Ksar Guilain, etc.
- 2 Construction of Hotels
 - Additional accommodation will be constructed within the existing tourist zones or in the urban area along with the increase of the demand. As the landscape is an important element for this region, the building design (particularly height and color) should follow the building guidelines.
- 3 Improvement of Existing Hotels
 - Service and facility upgrading of existing hotels. This includes staff training.

12.3.6 Infrastructure Development Plan

(1) Roads and Transport

a) Improvement of Accessibility to the Region

- 1 Access Improvement to Tozeur
 - Improvement of flight operation to Tozeur from Europe, Tunis and Jerba by rescheduling and additional planes to make more convenient for tourists and travel agencies.
- 2 Access Improvement to Matmata, Medenine, and Tataouine
 - Acceleration of the expansion plan of the expressway between Sousse and Medenine, and undergoing expansion project of railway between Gabes and Medenne.

b) Tourist Circuit Development within the Region

- 3 Provision of Trilingual Traffic Signage
 - Provision of traffic signage in Arabic, French and English along the tourist circuit roads.
- 4 Upgrading of “Lézard Rouge”
 - Upgrading of the services of “Lézard Rouge” (increased trips, numbers of passengers, provision of information on departure and arrival, etc.) and development of platform and parking area for vehicles at the station of Gorges de Seldja.
- 5 Road Improvement between Matmata and Tataouine
 - Improvement of the pavement for the section Techine-Ksar Ouled Bou Abid with a distance of 43 km, which is a part of the section between Matmata and Tataouine as the priority project in the short term.
- 6 Access Road Improvement to Ksars
 - Improvement of access roads to each of major Ksar along the identified circuits such as Ksar Joumaa on a very scenic hilltop, now only for 4 x 4 access en route from Ksar Haddada to Medenine.

c) Connection of Sahara and Berber Cores

- 7 Desert Trail Development between Douz and Ksar Ghilene
 - Development of a desert trail that connects between Douz-Jebil natural park and Ksar Ghilene for formulation of more convenient road network.

(2) Environment and Utilities

a) Upgrading tourism attractiveness and appeal to visual impression

- 1 Garbage Collection
 - Improvement of garbage collection and cleaning at major tourist sites such as tourist courses in oases and ksars.
- 2 Beautification of Oasis
 - Improvement of trails in oasis in Tozeur and .Nefta, etc.

- 3 Restoration of Ksars and Ghorfas
 - Restoration of Ksars and Ghorfas.

b) Encouragement for conservation of resources

- 4 Incentives for water treatment and recycled water use
 - Provision of incentives for sewer water treatment facilities and use of recycled water for sprinkler, baths, irrigation, etc.
- 5 Public awareness program for water consumption reduction
 - Organization of seminars and campaigns to sensitize local people and tourists to conserve water consumption.

13 MEASURES FOR 2006

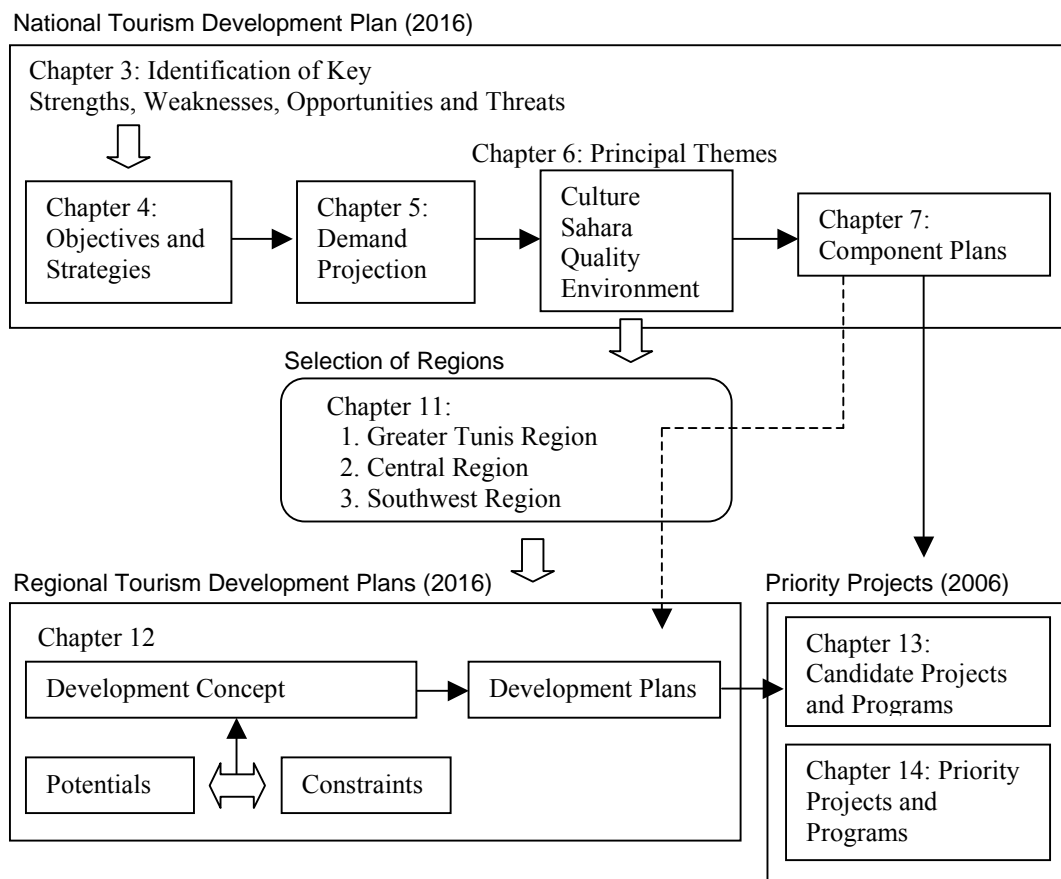
13.1 CANDIDATE PROJECTS AND PROGRAMS

13.1.1 Identification of Candidate Priority Projects and Programs

In Part II of Volume I of this report, the detailed assessment of the existing situation and the future prospects lead to the identification of component plans that include various projects and programs desirable to be implemented by the year 2016. [Chapter 7 “Component Development Plans”]

In the precedent chapter of this report, a lot of candidate projects in the selected three regions were also identified in the form of component plans: i.e., tourism product development plans and infrastructure development plans for the selected three regions of Greater Tunis, Central and Southwest. [Chapter 12 “Plans for Selected Region (2016)”]

Figure 13.1.1 Formulation of Priority Projects and Programs



Source: JICA Study Team

Among the component plans, both at national level and regional level, candidate priority projects and programs recommended to be implemented by the year 2006 were identified through further detailed investigation conducted during the second field survey and discussions with various parties concerned.

During the selection, the importance of each plan including the following aspects was duly considered for the determination of candidate priority projects and programs.

- 1 Projects to increase the perception value of Tunisian tourism in the world tourism market,
- 2 Contribution to attracting foreign tourists, and
- 3 Contribution to increase tourism receipt.

A list of candidate priority projects and programs is shown in the following Section.

13.1.2 Candidate Priority Projects and Programs

The candidate priority projects and programs were identified as shown in Table 13.1.1. Each of them is listed with its relation to each of the four principal axes. Naturally, all of them are consistent with at least one of the four principal axes (Culture, Sahara, Quality and Environment). The importance of each project or program duly considered in the selection process is shown with “+”, “++” or “+++”.

Subsequently, the following aspects were taken into consideration for the evaluation of candidate priority projects and programs:

- Importance of each project or program,
- Readiness of the project or programs including availability of land,
- Projects to be implemented by the public sector with significant potential to encourage private sector activities,
- Projects or programs not committed by other organizations, and
- Possibility of introducing foreign assistance.

The results are shown in the last column of each list. The candidate priority projects and programs recommended to be implemented by 2006 and consistent with the above aspects are given [$\sqrt{}$] and those partly consistent are given [$(\sqrt{})$] in the last column.

Table 13.1.1 Identified Candidate Priority Projects and Programs (1/3)

(1) Greater Tunis Region

Projects and Programs	C	S	Q	E	Note	R
1-1 Upgraded Visitor Facilitation a in Carthage	+++		++		High necessity	√
1-2 Provision of Car Parking in Carthage			+	++	Part of Visitor Center	(√)
1-3 Creation of “Water Supply Museum” at la Malga in Carthage	++		+		MEAT	√
1-4 Upgrading of Bardo Museum	++		+		WB study	
1-5 Rehabilitation of Medina of Tunis	++		+	++	ASM	√
1-6 Establishment of a Visitor Center in Medina of Tunis	++		++		High necessity	√
1-7 Establishment of an Art and Craft Center in Medina of Tunis	++		+++		High necessity	√
1-8 Garbage Collection Improvement			+	+++	Necessity in medina	√
1-9 Replacement of Overhead Wiring and TV antennas in Medina of Tunis			+	++	Encourage rehabilitation	√
1-10 Aqueduct Restoration and Improved Presentation	+			++	MEAT	√
1-11 Archeological Sites Upgrading	++		++		High necessity	√
1-12 Access Road Improvement at Major Tourist Sites	+		+		Dougga	(√)
1-13 Promotion of MICE Tourism			+++		High necessity	√
1-14 Trilingual Traffic Signage for Major Tourist Sites in the Region			++		ONTT	√
1-15 Development of Entertainment for Tourists			++		Private sector	
1-16 Creation of Themed Cultural Circuit	++		++		High priority	√
1-17 Increased Incentives for Cultural Heritage Restoration and Use	+			++	ASM	√
1-18 Beautification at Tourist Sites				++	ONTT	√
1-19 Beachfronts Beautification			+	++	ONTT	(√)
1-20 Development of Up-Market Resort			++	+	High priority	√

Note: C: Culture, S: Sahara, Q: Quality, E: Environment; +~+++ : importance; R: Result

Table 13.1.1 Identified Candidate Priority Projects and Programs (2/3)

(2) Central Region

Projects and Programs	C	S	Q	E	Note	R
2-1 Rehabilitation of Medina of Kairouan	++			++	High necessity	√
2-2 Establishment of an Islamic Art Museum in Kairouan	++		+		Existing museum in nearby Rakkada	
2-3 Establishment of Visitor Center in Medina of Kairouan	+		++		Need for extension	√
2-4 Increased Incentives for Cultural Heritage Restoration and Use	+			++	ASM	√
2-5 Garbage Collection Improvement			+	++	Necessity in medina	√
2-6 Creation of Tourist Attraction at El Jem	++		+		AMVPPC, ONTT	√
2-7 Rehabilitation of Medina of Mahdia	++			++	ASM	√
2-8 Replacement of Overhead Wiring in Medina			+	++	ASM	√
2-9 Beachfront Beautification			+	++	ONTT	(√)
2-10 Street Beautification in Resort Areas (Tourist Zones)				++	ONTT	(√)
2-11 Rehabilitation of Medina of Sousse	+			++	Circuit creation	(√)
2-12 Development of Car Parking in Sousse, Monastir, etc.			+	++	Land availability is not clear	
2-12 Upgrading of Sousse Museum	++		+		WB study	
2-13 Development of Entertainment for Tourists			++		Private sector	

Note: C: Culture, S: Sahara, Q: Quality, E: Environment; +~+++ : importance; R: Result

(3) Southwest Region

Projects and Programs	C	S	Q	E	Note	R
3-1 Improvement of Airport Visitor Center		+	+		ONTT	√
3-2 Establishment of Sahara and Oasis Museum		++		+	High necessity	√
3-3 Sahara Field Museum in Douz		++	++	+	Extension of existing museum	√
3-4 Desert Sports Promotion		++		+	ONTT+FTAV	√
3-5 Establishment of Ksars and Ghorfas Visitor Center in Tataouine		++	++		High necessity	√
3-6 Development of Ksars and Ghorfas		+		+	High necessity	√
3-7 Creation of Themed Circuits		++		+	High necessity	√
3-8 Beautification of Oasis		+		++	High necessity	√
3-9 Improvement of Camel Riding in Desert		++	++	+	High necessity	√
3-10 Development of Cycle Tourism		++		++	ONTT	√
3-11 Restoration of Ksars and Gorphas		++		++	High necessity	(√)
3-12 Local Character Up-Market Accommodation Development		++	+		Private sector	
3-13 Development of Up-Market Resorts			++	++	Private sector	
3-14 Trilingual Traffic Signage for Major Tourist Sites in the Region		+	++		ONTT	√
3-15 Road Improvement between Matmata and Tataouine		++	+		MEH	√

Note: C: Culture, S: Sahara, Q: Quality, E: Environment; +~+++ : importance; R: Result

Table 13.1.1 Identified Candidate Priority Projects and Programs (3/3)

(4) Nationwide

Projects and Programs	C	S	Q	E	Note	R
4-1 Procedural Reform for More Competitive Tourist Zone Development			++	+	High necessity	√
4-2 Staff Training of Tourist Information Services			++		High necessity	√
4-3 Staff Training of Tourism Industries			++		High necessity	√
4-4 Staff Training of Tour Guides	+	+	++		High necessity	√
4-5 Staff Training of Curators			++		Partly integrated	(√)
4-6 Souvenir Development and Marketing	+	+	++		Partly integrated	(√)
4-7 Promotion Material Production and Update	+	+	++		Partly integrated	(√)
4-8 Investment Promotion and Investor Seminars			++		High necessity	√
4-9 Rearrangement of Investment Incentives			++		Necessity of detailed study	√
4-10 Periodical Tourist Interview Surveys	+	+	++		ONTT's responsibility	
4-11 Incentives and Seminars for Water Consumption Reduction				++	Partly integrated	(√)
4-12 Strengthening of Tourist Statistics and Analysis			++		ONTT's responsibility	

Note: C: Culture, S: Sahara, Q: Quality, E: Environment; +~+++ : importance; R: Result

13.2 SELECTED PRIORITY PROJECTS AND PROGRAMS

Among the candidate priority projects and programs listed in the precedent Section and consistent with the evaluation aspects (indicated with [√] or [(√)] in the last column), four packages of priority projects were formulated by integrating some of them, and two packages of priority programs were also formulated.

The selected priority projects and programs packages are:

- 1 Package A: Carthage Heritage Park
- 2 Package B: Islamic Urban Heritage
- 3 Package C: Sahara and Oasis Life
- 4 Package D: Cultural Circuit Upgrading
- 5 Package E: Reform for Competitive Beach Resort
- 6 Package F: MICE Tourism Promotion

The formulation of priority project packages or projects aims at strengthening their components each other. Details of them will be presented in the following Chapter.

