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TOURISM AND DEVELOPMENT IN TUNISIA

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Abstract: Economic liberalization policies, externally imposed structural requirements, and Tunisia's comparative advantage have led the government to pursue tourism on a large scale. The growth of this sector has been phenomenal as evidenced by large scale hotel resort enclaves for Europeans and supportive infrastructural commitments by government and the private sector. The economic impact has been impressive in deficit reduction, capital accumulation, and balance of trade, but shows a vulnerability to the vicissitudes of international events. Despite economic gains, Tunisian policymakers are faced with cost/benefit ratio decision due to social and environmental impacts and the clash between Islamic and European values. **Keywords:** economic liberalization, intercultural contact, Islamicist, sociocultural change, structural adjustment, tourist enclaves, trade deficit.

Résumé: Tourisme et développement en Tunisie. Une politique de libéralisation économique, des conditions structurelles imposées de l'extérieur et l'avantage comparative de la Tunisie ont mené le gouvernement à poursuivre le tourisme sur une grande échelle. La croissance du tourisme a été phénoménale grâce aux grandes enclaves de lieux de vacances pour les Européens et aux engagements d'infrastructure pris par le gouvernement et le secteur privé. L'impact économique a été impressionnant du point de vue de la réduction du déficit, de l'accroissement de capital et de la balance commerciale, mais il est vulnérable aux vicissitudes des événements internationaux. Malgré les gains économiques, les décideurs tunisiens doivent faire face aux impacts sociaux et environnementaux et aux conflits entre les valeurs européennes et islamiques. **Mots-clés:** libéralisation économique, contact interculturel, ajustement structurel, enclaves de touristes, déficit extérieur.

INTRODUCTION

Much has been written on the pessimistic outlook for Africa's economic development. The scenario of economic marginalization figures prominently for the future, raising doubts about the viability of long-term solutions. The debate on resolving these problems includes the usual arguments for and against external involvement with foreign investment strategies (World Bank 1989; UNECA 1989). One such strategy in Africa, with positive and negative aspects, is the multi-billion dollar industry of tourism (Wright and Poirier 1991). Tourism has proven to be the fastest growing sector of the economy in many developing countries; and at the global level, according to the World Tourism Trade Organization, it is projected to reach $527 billion in receipts by the year 2000 (The Courier 1990).

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Africa, of course, has been relegated to the "pleasure periphery" of world tourism, extracting a small share (3%) of world tourism receipts (Wright and Poirier 1991). Nevertheless, many African governments are eagerly seeking a greater share of the world tourism dollar (Africa Research Bulletin 1990; Jenkins and Henry 1982; Wright and Poirier 1991).

Within the continent, the North African littoral receives the largest share, with Tunisia having one of the more aggressive tourism development policies designed to encourage foreign private investment in the tourism sector. As an illustration of the magnitude of this effort, Tunisia was visited in 1992 by more than 3.5 million tourists. This is an increase of 9.8% over the previous year (Tunisia Digest 1993). This paper is an analysis of the efforts, and the attendant problems, of the Tunisian government to remain on top in the increasingly competitive market of world tourism.

As reported elsewhere, the Tunisian government has embarked on a number of political and economic reforms since the peaceful coup against Habib Bourguiba in 1987 (Poirier and Wright 1993; Zartman 1991). Preparations are in progress for presidential and legislative elections in March, 1994 which show every sign that democratic reforms have taken hold (Tunisia Digest 1993). Political liberalization has, most significantly, facilitated policies that encourage the formation of private capital. In December of 1992, President Ben Ali announced the convertibility of the Tunisian dinar (TD), which will most certainly encourage foreign investment and capital growth (Tunisia Digest 1993). The currency reform decision includes the lifting of previous restrictions on the transfer of capital and profits by foreign investors. These decisions, and others made earlier in the Ben Ali era, signal the departure of state enterprises. Presently, in this more economically liberal climate, although pursuing a multiplicity of economic schemes to optimize Tunisia's comparative advantage, policymakers perceive tourism as a high priority sector to enrich the country's infrastructure and increase its earning of foreign exchange.

TOURISM IN TUNISIA

From its inception as a coherent development strategy in 1962, tourism in Tunisia has been designed to appeal to a mass market focused around the package tour concept. In fact, approximately 80% of arrivals come in groups. To accommodate the burgeoning demand for resort tourism along Tunisia's spectacular 800 mile coastline, the government undertook a major hotel construction program, which continues to the present. During the 70s and 80s, the number of lodging facilities and bed capacity more than doubled and tripled, respectively. This development makes Tunisia one of the fastest growing tourism economies in the world (Table 1). The growth continues as the Ministry of Tourism estimates that another 80,000 beds will be added so that the total capacity will exceed 200,000 by the end of the present decade (Tunisia Digest 1993).

The majority of hotels are located in the vicinity of Tunis, but the bed capacity is mostly found in the prime resort areas of Nabeul-

Table 1. Tunisia's Lodging Establishments and Bed Capacity (1970–1992)

Year	Establishments	Bed Capacity	Mean Capacity
1970	212	34,297	162
1975	273	62,397	229
1980	319	71,529	224
1985	420	93,275	222
1986	434	98,668	227
1987	443	100,456	227
1988	465	104,854	226
1989	476	109,771	231
1990	508	116,534	229
1991	532	123,188	232
1992	563	135,561	240

Source: Various ONTT publications.

Hammamet, the "Sahel" (a section of the eastern littoral), and the Djerba-Gabes regions (Table 2). On the whole, the newer resort establishments are larger and have been purpose-built for the European package tour industry. Currently, more than 80% of Tunisia's total capacity is located at seaside resorts, but that figure is likely to change as plans unfold to develop the interior to tourism. The government recently announced, as part of the Eighth Development Plan (1992–1996), major resort construction programs in the interior of Tunisia's exotic southwest, reflecting tourism's extension to regions other than the coast. Tozeur, Kebili and Gafsa, for example, experienced in 1992 a 60% increase in visitors from the previous year (Tunisia Digest 1993).

The growth of the industry has been rapid and the capital investment has been intense, particularly in the past 15 years. In 1977, private investments in Tunisian hotels amounted to TD10.5 million, but that relatively modest amount was soon overshadowed by consider-

Table 2. Percentage Distribution of Hotel Facilities by Region (1989–1992)

	1989		1990		1991		1992	
Region	H[a]	C[b]	H[a]	C[b]	H[a]	C[b]	H[a]	C[b]
Tunis-Zaghouan	26	13	25	13	24	13	22	12
Nabeul-Hammamet	18	28	17	28	18	27	18	27
Sousse-Kairouan	14	22	14	21	14	21	15	21
Monastir-Sfax	13	15	12	14	12	14	12	14
Djerba-Gabes	15	16	15	17	15	18	15	19
Gafsa-Tozeur	8	4	10	4	10	5	11	5
Bizerte-Tabarka	5	3	6	3	6	3	6	3
Total	100	100	100	100	100	100	100	100

[a]Hotels; [b]Capacity.
Source: ONTT (1992).

Table 3. Investments in Hotels (1977–1992)

Year	Investments (in TD million)	Year	Investments (in TD million)
1977	10.5	1985	99.0
1978	17.2	1986	85.0
1979	10.0	1987	63.0
1980	31.5	1988	78.8
1981	33.7	1989	109.1
1982	43.0	1990	118.8
1983	74.5	1991	125.0
1984	113.2	1992	202.8

Source: ONTT (1992).

able growth showing a more than twentyfold increase to TD202.8 million by 1992 (Table 3). The growth during the course of the Seventh Development Plan (1987–1991) shows the continued focus on seaside resort development that has marked hotel development policy since the 1960s (Table 4).

Given the relatively short distance across the Mediterranean (on a clear day Sicily is visible from Tunisia's north coast), the sizeable discretionary incomes available to Europeans and the cheaper costs on the North African coast of the Mediterranean, it is not surprising that the industry is Eurocentric, despite the fact that arrival data suggest a large Maghrebi presence on Tunisian soil. Consistently, well over 90% of foreign entries in Tunisia are from North African littoral (Maghreb) countries (mostly Libya) or Europe. In the 1970s, Europeans overshadowed all other tourists. But this profile changed in the 1980s as the European-Maghrebi gap began to narrow considerably, excepting the Gulf War year (1991), which showed a large influx of Maghrebi relative to Europeans (Table 5).

More significant than the number of entries, however, is that Europeans stay much longer and spend more money per capita/per diem than their Maghrebi counterparts (Table 6). Economic or political downturns, such as the Gulf War and the resulting drop in European traffic, could adversely impact European entries and severely harm the tourism economy as Maghrebis could not fill the spending gap. Initially French tourists, due to Tunisia's historic and economic ties with

Table 4. Investments (TDm) by Region for 7th Plan (1987–1991)

Region	1987	1988	1989	1990	1991
Tunis-Zaghouan	15,500	17,225	13,785	5,095	3,000
Nabeul-Hammamet	21,900	17,413	20,229	30,554	21,000
Sousse-Kairouan	16,900	21,674	26,740	23,876	20,000
Monastir-Sfax	4,300	6,219	8,729	4,670	20,000
Djerba-Gabes	1,700	14,160	25,270	32,084	42,000
Other		2,100	14,355	22,489	19,000

Source: ONTT (1991).

Table 5. European and Maghrebi Entries (1977-1981; 1988-1992)

Year	European	% of Total	Maghrebi	% of Total
1977	849,100	83	104,300	10
1978	887,100	77	163,000	14
1979	1,068,000	78	211,800	45
1980	1,110,500	69	431,300	26
1981	1,146,100	53	915,800	42
1988	1,681,882	48	1,696,581	48
1989	1,670,500	52	1,443,215	45
1990	1,705,400	54	1,378,426	43
1991	1,086,500	34	2,058,721	63
1992	1,849,380	52	1,598,971	45

Source: ONTT (1988, 1992).

France, were the largest single national group utilizing resorts. Strategies by the Ministry of Tourism to stress the winter "fun-in-the-sun" appeal of Tunisia to the northern climates has resulted, however, in a large influx of German tourists in the past 2 years. Currently, Germany leads the world's tourists flocking to Tunisia. After experiencing a 16% Gulf War related drop in 1991, German entries in 1992 increased more than 60% from 393,416 to a record high of 649,381, nearly double French entries (Tunisia Digest 1993).

Furthermore, it has become evident that efforts by the Ministry of Tourism to attract more North American tourists to Tunisia is beginning to pay off. Traditionally, this has been a very small market with the combined tourists from the United States and Canada accounting for less than .5% of the total influx. North American entries have increased since 1989, although not significantly, due to sharp declines in US entries as concern over the Gulf War frightened potential travelers. Arrivals from the United States declined 37% between 1990 and 1991 but have increased by 56% in 1992, while Canadian arrivals have risen 100% (Tunisia Digest 1993). Ratification of the Bilateral Investment Treaty (BIT), which took effect in February 1993, will undoubtedly increase both US tourism and investments in Tunisia. The BIT guarantees American investors standards of international law with respect to expropriation and compensation but, most importantly, signals US confidence in the Tunisian economy. Reinforcing that as-

Table 6. European and Maghrebi Total Nights Stayed/Average Stay (1990-1992)

	1990		1991		1992	
	Total Nights	Avg.	Total Nights	Avg.	Total Nights	Avg.
Europeans	17,824,529	10.45	11,304,967	10.4	18,896,587	10.2
Maghrebi	629,838	2.19	805,918	2.55	703,939	2.27

Source: ONTT (1992).

surance is an inflation rate of 5.5% in 1992, which is a 20-year low (Tunisia Digest 1993).

The growth of North American tourism in Tunisia is encouraging, but filled with pitfalls. The Gulf War demonstrates the ephemeral appeal of travel to an Arab country for most American vacationers. It would take very little to shake the confidence level of a target population already burdened by prejudices and somewhat skeptical about personal security in the Arab world. For example, tourism in Egypt has been negatively impacted by Islamic fundamentalist attacks against tourists in 1993 and the problem continues into 1994. Recent events in Algeria could easily precipitate a similar decline in Tunisian tourism revenues as travelers fear a spill-over of anti-Western sentiments into the Tunisian polity. The stunning electoral "victory" of the Front islamic du salut (FIS) and subsequent events in that strife torn land have already reverberated across the Maghreb (Tahi 1992). Since 1992, more than 2,500 lives have been lost in the Algerian conflict, numerous foreigners have been attacked and killed, and anti-Western sentiments have risen. Italy, a major supplier of tourists in North Africa, has substantially reduced economic activity with Algeria (LaFranchi 1993). Other European countries might well follow Italy's lead.

Tourism and the Tunisian Economy

Assessing tourism's contribution to development is problematic and it is "generally acknowledged that the evaluation of the tourism industry's performance is a task which has defeated most Third World governments" (Lea 1988). From the perspective of political science, there are a couple of possible explanations for this. First, the political science literature is not without controversy in its conceptual understanding of development (Chilcote 1984). Second, tourism is a complex of activities ranging from transportation, lodging, food, crafts, cultural events, and more. Hence, operationalizing the terms poses problems and sorting out the plethora of variables for valid measures between tourism and development is nettlesome. Thus, the effect of tourism on the Tunisian economy is mixed and measuring its multiplier effect is difficult (Ryan 1991). Given this problem, it is equally difficult to ascertain "pre-tourism" and "post-tourism" development changes solely as a function of tourism.

Tourism, however, cannot be considered outside the framework of the global economy and western structural adjustment programs that play a major role in driving tourism policy. Prior to the heavy emphasis on tourism, Bourguiba "envisioned the creation of a modern capitalist economy" (Anderson 1986:238). Despite Bourguiba's intentions and efforts to stimulate the economy, growth, hence social development, remained sluggish throughout the 1960s. Tunisia remained dependent on foreign aid as deficits grew largely because outmoded state enterprises had "become a fetter rather than a factor of economic development," and "the principal cause of the growth of the country's external debt" (Grissa 1991:120). In the 1970s, under the leadership of a free enterprise activist Prime Minister, Heidi Nouira, tourism became a major focus and other investment incentives turned the economy around as Tunisia experienced a positive balance of payments (Anderson 1986). Population increases, however, weakened the growth spurt, because there was no alleviation in the rise of unemployment. Job creation priorities, declining oil production, rising debt servicing, and structural adjustment requirements drove policymakers to enhance export promotion (Ferchiou 1991). The serious political commitment for job creation developed in the early 1970s, approximating the country's commitment to promote tourism as its leading export commodity. Formalizing this commitment, the country adopted investment laws favorable to labor intensive projects (Ferchiou 1991). Leading this activity was international subcontracting, such as resort construction projects. By 1986, an invigorated private sector in Tunisia and an export driven economy, mostly from tourism, created conditions for growth for the first time since independence (Grissa 1991).

Advocates assert that the tourism sector promotes foreign exchange earnings, reduces unemployment, and provides more security than traditional exports. Trade statistics for Tunisia clearly show tourism's important, if not primary, position in the country's economic profile. In 1970, for example, this sector contributed TD31.6 million in foreign receipts which covered 48.7% of the trade deficit. By 1988, these figures had dramatically increased to TD1,086 million which accounted for a 97.2% coverage. This was an extreme year, but the mean has remained close to 60% (Table 7).

Despite the plummeting of tourism receipts in 1991 to a very low TD632 million, due to the Gulf War, figures for 1992 climbed 49%, to TD945 million. This was just short of the TD1,086 million in the record year of 1988 (ONTT 1992). The performance of the sector also continues to look strong relative to other aspects of Tunisia's export economy. With the notable exception of 1991, tourism has consistently held about a 20% average share of the country's total foreign trade (Table 8).

In addition to its value as a source of foreign exchange for Tunisia, tourism has been providing jobs in a society where unemployment is a

Table 7. Coverage of Trade Deficits by Receipts from Tourism (1970–1992)

Year	Imports TDm	Exports TDm	Deficit TDm	Receipts TDm	Coverage %
1970	160.4	95.8	664.6	31.6	48.7
1975	572.8	345.6	227.2	115.2	50.7
1980	1,428.4	904.8	523.6	259.7	49.6
1985	2,131.4	1,435.1	696.3	415.0	59.6
1986	2,303.7	1,403.7	900.0	385.8	42.9
1987	2,509.1	1,770.7	738.4	568.9	77.0
1988	3,167.0	2,055.5	1,111.5	1,086.1	97.7
1989	4,150.7	2,782.0	1,368.7	880.7	64.3
1990	4,852.0	3,086.0	1,766.0	827.8	46.9
1991	4,789.0	3,429.9	1,359.1	632.0	46.5
1992	5,673.9	3,566.7	2,107.2	945.0	44.8

Source: ONTT (1992).

Table 8. Tourism and Foreign Trade (1983–1992)

Product	1983	1984	1985	1986	1987
Tourism	389.2	357.7	415.0	385.8	568.9
Petroleum	547.6	591.7	568.7	339.4	418.3
Olive Oil	24.8	57.3	42.8	53.4	65.6
Phosphate	26.6	27.0	25.4	25.8	25.9
Phosphorus	91.4	91.9	91.2	74.7	69.8
Textiles	219.7	223.4	283.4	388.4	496.2
Dates/Citrus	18.0	21.5	35.1	37.7	46.0
Other	617.7	749.5	823.4	809.8	1034.3
Total	1935.0	2120.0	2285.0	2115.0	2725.0
Tourism %	20.11%	16.87%	18.16%	18.24%	20.88%
Product	**1988**	**1989**	**1990**	**1991**	**1992**
Tourism	1086.1	880.7	827.8	632	945
Petroleum	330.7	555.5	531.6	488.8	538.4
Olive Oil	70.7	81.5	106.9	266.8	138.5
Phosphate	26.9	32.5	17.4	14.0	27.8
Phosphorus	142.0	159.3	156.0	123.1	144.4
Textiles	614.3	816.0	1091.3	1212.4	1401.0
Dates/Citrus	47.0	47.4	54.6	59.3	51.6
Other	1092.4	1494.1	1914.4	1972.6	2069.7
Total	3410.1	4067.0	4700.0	4769.0	5316.4
Tourism %	31.85%	21.65%	17.61%	13.25%	17.78%

Source: ONTT (1992).

serious problem. Currently, the country has a 14% unemployment rate, with more than 400,000 unemployed, while an additional 40,000 to 60,000 enter the job market annually (Institut National de las Statistique 1990). Tunisia's past commitment to socialism created jobs that were sometimes wasteful and redundant (Grissa 1991). Privatization, therefore, has led to even more intense political pressure to generate employment to "prove" the value of the country's new economic philosophy. Between 1962 and 1992, tourism accounted for an uninterrupted rise in direct employment and a decline in the annual average deficit between labor supply and demand (ONTT 1992). Since tourism has achieved positive results in generating direct employment, it is understandable that politicians find it appealing. The current (and previous) 5-year development plan stresses the continued emphasis on this sector. The direct employment trends for a recent 5-year period substantiate the criticism that job growth is concentrated in the high density tourism enclaves such as the Nabeul-Hammamet, Sousse-Kairouan, and Djerba-Gabes regions (Table 9).

A 1988 study directed by ONTT estimated that the number of jobs directly attributed to tourism ranged between 0.88 and 1.2 per hotel bed, a figure not unlike that found in other developing countries (Green 1979; Smaoui 1979). ONTT reports, however, that for 1992 the ratio was well below that range as the addition of 6,654 beds to the infrastructure created 2,661 direct jobs, which translates to a rate of only 0.39. It is difficult to obtain data on the indirect spin-off of the

Table 9. Growth of Direct Employment by Tourism Region (1988-1992)

Region	1988	1989	1990	1991	1992
Tunis-Zaghouan	5,948	5,877	6,131	6,281	6,246
Nabeul-Hammamet	11,721	12,116	12,882	13,414	14,633
Sousse-Kairouan	9,023	9,677	9,818	10,317	11,160
Monastir-Sfax	6,169	6,509	6,682	6,801	7,647
Djerba-Gabes	6,512	6,991	7,842	8,788	10,197
Gafsa-Tozeur	1,416	1,612	2,034	2,389	2,728
Bizerte-Tabarka	1,150	1,126	1,225	1,285	1,613
Total	41,939	43,908	46,614	49,275	54,224

Source: ONTT (1992).

new positions or on the quality of these jobs. But, typically, resort industry employment in developing countries offers rather low-paying marginally-challenging labor as domestics. Females accounted for 16% of all tourism personnel, confirming Enloe's observation that "they are presumed to be naturally capable of cleaning, washing, cooking, serving. Since tourism companies need precisely those jobs done, they can keep their labor costs low if they can define [them] as women's work" (Enloe 1990). As a result, women are now universally recognized as the "housewives." When such a label is given to women then the work done by them outside the household is usually recognized as supplementary labor, justifying lower wages for these workers (Mies 1986). There has been very little scholarly research on the specific employment role of women in tourism, although much effort has been directed in the broader area of their roles in economic development (Afshar 1991; Charlton 1984; Sebstad 1989; World Bank 1989).

The situation in Tunisia is similar to that which prevails in most African countries, in that the labor requirements of tourism are especially "suited" to the prevailing economic conditions characterized by high unemployment and low levels of education and skills. When compared with most other industries, tourism can employ people with relatively little specialization. Thus, it is possible to absorb a large proportion of the workforce from traditional sectors of the economy with a minimum of training.

Tourism creates relatively few managerial and professional posts, and these are often filled from other sectors and/or by specially recruited expatriates. To counter this problem, several hotel/restaurant management schools and institutes have been set up that have become, in themselves, a growth industry. In 1988, for example, Tunisia awarded over 300 diplomas, whereas in 1992 that figure reached a total of 667 in various categories of the profession, an increase of over 100% overall and 22% over the 1991 figure (ONTT 1992).

The expansion of this industry, and others in Tunisia, led to a migration of those from agriculture and fishing who believed that work in either a factory or a hotel was less back-breaking and offered the boon of a fixed income. Considering that almost all Tunisia's beaches are choice locations for packaged tourism, efforts to maximize that blessing have contributed to a disproportionate growth along the Mediterranean littoral at the expense of the central and southern regions of the country, and often to the impairment of agricultural production (Larson 1991). Attempts to increase the productivity of the domestic agriculture sector to provide food supplies for European palates can impact on women's status and income by increasing financial gains from farming. More often than not, however, patterns of land ownership in Tunisia, as elsewhere in the developing world, disadvantage females and the trend to large-scale mechanization (Larson 1991) further marginalizes rural women producers.

Social and Environmental Impact

The sociocultural repercussions of tourism are difficult to gauge with precision; unlike most Islamic/Arab countries, Tunisia straddles between a European and an Arab orientation. Former President Bourguiba, and the anti-Islamic reforms of the Neo-Destour socialist movement begun in the early 1930s, was very effective in Westernizing both elites and masses in Tunisian society to the degree that Tunisia is the most "liberal" of the Muslim societies in the Arab world. Women, for example, have long been emancipated by reforms in status laws, achieving rights well ahead of most of their sister Arabs and, taking abortion as an example, even arguably ahead of the United States (Tunisian External Communication Agency 1993). Although traditional dress is still seen among men and women, western clothing is the predominant choice. Furthermore, it is difficult to completely single out tourism as a factor in sociocultural change when Tunisian society has been bombarded for decades with Western television programs. The predominance of French and Italian language programming has already undermined Arabic language and values, reinforcing the pervasive presence of European culture; thus, arguably softening Tunisians to be more "amenable" to tourists.

Notwithstanding the above caveats, however, Tunisia is still an Islamic society with values very different from the hordes of European tourists who populate its beaches in search of sun, sand, and sex. The cultural impact is real and cannot be taken lightly. Travel plays an important role in Islamic culture because of the required pilgrimage to Mecca and is discussed at length in the Qu'ran. Furthermore, vestiges of ancient traditions among desert nomadic peoples concerning safe travel and hospitality still mark Arab culture. The Islamic view of travel is "to help instill the realization of the smallness of man and the greatness of God," as well as to promote brotherhood within the Islamic Ummah (community) (Din 1989).

Packaged tourism, however, has secular needs characterized by hedonism, permissiveness, and very little cross-cultural understanding and communication. Muslim countries either discourage tourism, like Saudi Arabia, or seek to accommodate it, like Tunisia, by isolating it from the mainstream (Din 1989). The construction of enclaves does succeed in making the intercultural contact transitory, but does not entirely limit the impact. In the many beach enclaves, European values and activities reign supreme. Contacts with Tunisians are rarely spontaneous and, when they do occur, are likely to be contrived. Sights that are common in the West, such as scantily-clad visitors on the beach or around the hotel pool, and open affection between men and women, offend many Tunisians. Additionally, tourists knowingly or unknowingly violating rules of propriety in and around mosques and Islamic religious activities, provide fuel to Islamic fundamentalists who criticize the excessive Westernization of Tunisian society.

The backlash can be seen in such behavior as women returning to the veil as a symbolic protest over increasing Western influences. It can also be observed in organized political opposition along Islamicist lines that the government has suppressed, tainting Tunisia's human rights record (Poirier and Wright 1993). More specific to tourism, workers at the seaside resorts live in the restricted world of their elders, but work daily in the world of exotic night-life and semi-nude beaches. According to Waltz, "no one feels these contradictions more than do young women," who are "raised with the notion that their bodies are the symbol of their families' honor" so that the return to Islamic dress "is perhaps the only course of guaranteed safety" (Waltz 1986:665).

From the perspective of Islamicists in Tunisia, tourism is a cause of adverse cultural impact. Although the Islamicist movement ranges along a broad and complex spectrum of thought, it holds in common a concern for the deterioration of Islamic values (Magnusson 1991). In many countries where tourism is emphasized, such as Thailand (Cohen 1982) and The Gambia (Harrell-Bond 1978), much has been written about the rise of prostitution (Crush and Wellings 1983; Enloe 1990; Graburn 1983). Although not on the magnitude of Thailand or the Philippines, Tunisia has not escaped this problem. Data on prostitution are virtually impossible to acquire in Arab countries. Nevertheless, Tunisia's prostitution, like The Gambia's, is predominantly male prostitution and quite obvious at any of the tourism enclaves. Prostitution anywhere today carries a high risk of AIDS, especially in Africa. According to the World Health Organization's estimates, half of the world's victims are African, while 80% of female victims of the virus are African (*West Africa* 1991). The full implications of this terrible human tragedy for tourism, and vice versa, are unclear in general, more so for Tunisia because the government is not forthright on this issue.

Tourism's impact is not limited to the human and cultural environment. The idea that "tourism kills tourism" by a heavy physical impact at a popular site is well-known in the literature (Preglau 1983). The 1989 Hague Declaration on Tourism, a manifesto for ecotourism, called for a tourism promotion policy that is consistent with "sustainable development." Although Tunisia has not yet reached the mythical "carrying capacity," the growth of the industry is clearly causing concerns in some circles. Despite the "success" of the Rio Earth Summit in 1992 in placing the environment on the global agenda and considering the link between the environment and development (Reed 1992, Rogers 1993), few developing countries have well organized environmental movements. Nevertheless, there is a growing body of literature on environmental issues in these countries (Goodman and Redclift 1991; Merchant 1992; Panayotou 1993), but little of it deals specifically with tourism (Briassoulis and van der Straaten 1992).

Tourism requires a sophisticated infrastructure, and often the building of roads and the expansion of hotels can significantly alter the physical environment due, in the latter case, to the problems of sewage treatment and refuse control. In the absence of organized environmental opposition, it is interesting to note that the government is more concerned with the environment's impact on the tourism industry than the reverse. For example, the 1987–1991 development plan recognized that the *existing* physical environment "does not contribute to the improvement of Tunisia's image," and has a detrimental effect on the tourism industry. This assessment forced the government to draw attention to the problems associated with public hygiene, security, and beach hustlers and called on municipalities to be sensitive to "the problem of garbage removal, beach maintenance, highways . . . public lighting, and insect control" (ONTT 1986).

Finally, in a country with an average monthly rainfall of 1.3 inches and one annually-flowing river (Medjerda), the competition for water between the agricultural and tourism sectors of the economy is understandably keen. Whereas the average per capita consumption of water among Tunisians is 60 litres, the tourism enclaves are consuming as much as eight times that amount (Table 10). The inevitable rise in tensions occurs when local inhabitants, particularly those dependent on water for agriculture, see hotels watering gardens or lawns and filling swimming pools when the supply is cut off sporadically in other parts of the city.

CONCLUSIONS

Given the pessimistic economic outlook for much of the African continent and tourism's economic potential, it is expected that governments will attempt to expand the tourism sector in the foreseeable future, as is clearly the case in Tunisia. Acceptance of the tourism option has both positive and negative results, and there is not a consen-

Table 10. Daily and Per Capita Hotel Water Consumption in Selected Regions (1991–1992)

Region	Consumption[a]	1991	1992[b]
Tunis-Zaghouan	Daily Consumption	827,000	725,900
	Per Capita Consumption	501	343
Nabeul-Hammamet	Daily Consumption	546,200	422,700
	Per Capita Consumption	143	70
Sousse-Kairouan	Daily Consumption	621,100	479,300
	Per Capita Consumption	188	188
Monastir-Sfax	Daily Consumption	817,200	704,900
	Per Capita Consumption	393	234
Djerba-Gabes	Daily Consumption	807,700	638,600
	Per Capita Consumption	358	164

[a]In litres.
[b]Provisional Data.
Source: ONTT (1992).

sus on its utility. The cost/benefit ratio between perceived or real economic gain and environmental/social consequences is difficult to gauge, although implementing more balanced tourism strategies may diminish the latter problem. The future prospect includes comparative advantage economic thinking among Tunisia's policymakers, external pressures toward structural adjustment measures, and a consequent impetus toward private investment and the integration of markets. Therefore Tunisia will probably continue on the current path into the foreseeable future. Larger global issues, such as the recent Gulf war, or regional problems, such as in Algeria and Egypt, indicate Tunisia's vulnerability in placing so many of its development goals in the area of tourism. Political instability, both regional and Tunisia specific, could seriously impact future economic growth. □□

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