

## Morocco's Tourism Policy for the FIFA World Cup 2030: A Benchmarking and Econometric Study

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**Abstract.** This study examines Morocco's tourism policy in preparation for the FIFA World Cup 2030, evaluating its alignment with sustainable and competitive benchmarks. Using a mixed-method approach—benchmarking against Spain and Portugal and econometric modeling via the Generalized Method of Moments (GMM)—we analyze Morocco's tourist arrivals (2007–2023) and key tourism indicators from the TTCI and TTDI databases. Findings indicate that while the 2023-2026 roadmap prioritizes air transport, human capital, and cultural resources, it falls short in ICT infrastructure, health and hygiene, and regulatory alignment. Future policies should integrate digitalization, health security, and structured tourism governance to ensure long-term competitiveness.

**Keywords:** *Tourism; Tourism policy; Tourism development; Benchmarking; Econometrics.*

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### 1. Introduction

Tourism is one of the largest and fastest-growing industries globally. According to the United Nations World Tourism Organization (UN Tourism previously UNWTO), the sector is projected to reach 1.8 billion international tourist arrivals by 2030. Despite the devastating health crisis of 2020, which led to a collapse between 60% to 80% of global tourism demand flows (Harchandani, et al., 2021) and revenues (Luković, et al., 2020). In the aftermath of the Covid-19 pandemic, several global organizations have recognized the pivotal role of tourism policies in the development of destinations and their capacity to address challenges related to promotion, sustainability, and competitiveness. The Organization for Economic Co-operation and Development (OECD) has observed a shift in tourism policies post-Covid-19 towards a more sustainable and competitive framework (OECD, 2022). Recently, the OECD emphasized that tourism policies must not only foster broader economic growth, but also balance tourism development for a more sustainable future, and enhance the resilience of both local and global travel markets. This can be achieved through the implementation of rigorous actions (OECD, 2024).

For Morocco, the national economy is significantly dependent on tourism activities. The most recent tourism satellite account indicates a direct contribution of 7% to Gross Domestic Product (GDP), with 12% accounting indirect effects. The sector directly employed 550,000 individuals and generated annual revenues of 80 billion dirhams in 2019 (IBRD & World Bank, 2022) (MTAESS, 2020). Additionally, Morocco welcomed a total of 14.53 million visitors and generated 104.6 billion dirhams of tourist receipts in 2023. This represents an increase from 10.9 million visitors and 93.7 billion dirhams in 2022, with a marking growth rates of 11% and 12%, respectively (Tourism Observatory, 2024). Furthermore, the national tourism sector has surpassed its pre-Covid-19 performance, with an additional 1.53 million tourists and 25.94 billion dirhams in revenue compared to 2019 levels (Tourism Observatory, 2020). Despite the

pandemic's massive negative impact, the pandemic confirms also the resiliency and the robustness of Moroccan travel and leisure activities. Given the economic, social, cultural, ecological, technological, and environmental significance of the tourism sector, Morocco has historically implemented various tourism policies tailored to different periods and objectives. The current national tourism policy is outlined in the 2023-26 roadmap, which aims to attract 17.5 million tourists, generate 120 billion dirhams in foreign currency from tourist receipts, and create 200,000 new direct tourism job opportunities (OECD, 2024). Through the implementation of aplenty actions, such as doubling air capacity, intensifying promotion and marketing efforts with a focus on digitalization, diversifying leisure offerings to include more cultural and entertainment offers. Also, reestablishing and expanding accommodation capacities, enhancing the competencies of human capital, and supporting the Tourism Observatory of Morocco to improve the accuracy of statistics and the quality of market studies (OECD, 2024). Recognizing that Moroccan tourism is currently undergoing a forced transition toward achieving sustainability and competitiveness. Particularly in anticipation of co-hosting the FIFA World Cup in 2030 alongside leading tourist destinations such as Spain and Portugal. Due to the scale of this challenge, the 2023-26 roadmap functions more as an operational guide than a comprehensive strategic policy. The Court of Auditors in Morocco highlights and acknowledges the existing shortcomings in tourism policy and planning. These issues primarily arise from the lack of comprehensive long-term national programs and regional plans necessary to support the sector's future evolution (Court of Auditors, 2023).

In light of these observations, and within a context of sustainability and increased international competitiveness, how can Morocco formulate an effective tourism policy that aligns with sustainability and competitiveness, in preparation for the FIFA World Cup 2030?

The objective of this study is to identify the key levers for formulating Morocco's future tourism policy by 2030. This is achieved through a mixed-methods approach. Qualitatively, the research involves an empirical investigation of the factors that influenced the establishment of previous national tourism policies, particularly both visions 2010 and 2020. Additionally, a comparative analysis (benchmarking) is conducted with the contemporary tourism policy models of Spain and Portugal. Quantitatively, dynamic econometric modeling is employed to assess the validity of the theoretical model and its determinants that shape tourism policies in the Moroccan context.

This research adopts a hypothetico-deductive approach, grounded on the assumption that the factors outlined in the 2023-26 roadmap are insufficient for formulating a successful tourism policy that addresses the challenges of sustainability and competitiveness up to the 2030 FIFA World Cup, particularly when compared to leading Mediterranean tourism destinations. The hypotheses are as follows:

- H1: The 2023-26 roadmap incorporates the essential elements that Moroccan tourism development needs to address the challenges of sustainability and competitiveness in the 2030 horizon.
- H2: The 2023-26 roadmap, which outlines the Moroccan tourism planning vision, does not adequately respond to national tourism development challenges in terms of sustainability and competitiveness, particularly in comparison with Spain and Portugal policies for the 2030 FIFA World Cup.

## **2. Literature review**

Tourism policy (TP) has seen growing academic and professional interest over recent decades. As a public policy, TP is an organized set of guidelines and strategies that direct decision-making, shaping tourism development and activities within destinations (Ritchie, et al., 2003)

(Vanhove , 2002). Globally, TP aims to integrate tourism's economic, political, cultural, and intellectual benefits harmoniously with local communities to enhance quality of life, support international peace, and foster prosperity (Edgell, 1990). TP outlines the strategic direction that a destination or nation intends to follow in developing tourism, aiming to maximize economic and social benefits. It supports quality visitor experiences while minimizing negative impacts on the environment and local cultures (Edgell , et al., 2019) (Biederman , 2007). TP has thus become a tool to ensure a balance between tourism growth and the protection of local environmental and socio-cultural integrity (Goeldner, et al., 2012). Following World War II, tourism policies prioritized promoting tourism to maximize visitor numbers and boost local economies, particularly through Foreign Direct Investment (FDI) and balance of payments (Sessa, 1976) (Fayos-Solá, 1996). This approach predominantly supported mass tourism, which often came at the cost of environmental and social impacts. By the 1980s, global sustainability debates led to calls for policies that incorporated socio-cultural and environmental factors into tourism. Concepts such as soft tourism emerged, emphasizing tourism's need to avoid damaging the very attractions it depends on, thus preserving the quality of life for local communities (Guo, et al., 2019) (Baum, 1994) (Krippendorf, 1982). Sustainable development was formally defined in the 1987 Brundtland Report as development that meets present needs without compromising future generations' ability to meet theirs (Hardy, et al., 2002) (WCED, 1987).

Contemporary sustainable tourism, guided by the "Tourism in the 2030 Agenda" aligns with the UN's Sustainable Development Goals (SDGs). These goals particularly emphasize decent work and economic growth (Goal 8), responsible consumption and production (Goal 12), and marine ecosystem protection (Goal 14) (UNWTO, 2017). Additionally, five pillars now guide tourism policies: sustainable growth, social inclusion, environmental protection, cultural heritage, and peace (Berbeka, et al., 2024). TPs focused on sustainability address various dimensions, such as socio-economic, ecological, and political. Such policies are often seen in destinations transitioning beyond mass tourism to more diversified and specialized offerings, under post-modern globalization's influence. This era saw the spread of new information technologies, intensifying global connectivity and cultural exchange (Hoogvelt, 2006).

The 1990s marked a shift from mass tourism, under Fordist principles of standardized production, to post-Fordist tourism, with more flexible, specialized offerings. Authors then emphasized that competitiveness in tourism could not exist without sustainability (Mottironi, et al., 2012). Competitiveness involves efficiently managing resources and delivering value while maintaining a competitive edge in the global market (Croes, et al., 2020) (Goffi, et al., 2019). Achieving competitiveness allows destinations to attract tourism, boost local life quality, and conserve resources for future generations (Hefny, 2023) (Ritchie, et al., 1993 ). The World Economic Forum's Travel and Tourism Competitiveness Index (TTCI), first established in 2001, evolved into the Travel and Tourism Development Index (TTDI) in 2021. This shift followed the COVID-19 crisis, incorporating resilience and sustainability into the index to highlight tourism's role in broader economic and social development (Hefny, 2023). Modern tourism policies focus on maximizing sustainable economic benefits while protecting and preserving resources. Post-Fordist tourism policies embrace principles of comparative and competitive advantage, grounded in the theories of David Ricardo and Michael Porter. These policies aim for long-term, sustainable profits while enabling destinations to thrive amid global competition (Fayos-Solà, 2002) (Vanhove , 2002) (Smeral, 1998) (Fayos-Solá, 1996).

### **3. Study of Spain, Portugal and Moroccan context**

Tourism policy as a progressive process of directives, guidelines, principles, procedures and actions established within a framework. And which represents the intention of a community (or

nation) to effectively achieve planning, development, promotion, sustainability and competitiveness objectives for the future growth of tourism (Edgell , et al., 2019).

From a historical and empirical standpoint, France established the National Tourist Office in 1910, making it the first country in the world to embrace tourism as a major state concern. At the same time, three other countries, Argentina (Piglia, 2011), Spain (Cantero, 2014), and Portugal (Garcia, 2014) were leaders in the development of tourism policies.

#### a. Spain case

Between 2000 and 2023, Spain launched multiple tourism policies: the Integral Quality Plan (PICTE) 2000-06, Horizon 2020, National Integral Plan 2012-15, the 2021 Recovery Plan, and the Sustainable Tourism Strategy 2030. PICTE prioritized collaboration among stakeholders, addressing environmental concerns through local projects and enforcing sustainability in high-density tourist regions like the Balearic and Canary Islands (Delgado, et al., 2012). The Spanish Tourism Quality Institute (ICTE) and the Spanish Integrated Tourism Quality System in Destinations (SICTED) further standardized quality measures (González, 2024).

The Horizon Plan 2020, influenced by OECD recommendations, focused on overcoming obstacles to innovation in tourism, targeting marketing, knowledge expansion, and environmental tourism (Parsa, et al., 2015). Initiatives included the Spanish Tourism Plan 2008-12, which sought to reduce seasonality and balance socio-territorial resources (Martín, et al., 2014), and the National Integral Plan 2012-15, which promoted Spain as a SMART Destination through ICTs (Baidal, et al., 2023).

COVID-19 severely impacted tourism, causing a 77% drop in visitors in 2020, leading to the 2021 Tourism Recovery, Transformation, and Resilience Plan (OECD, 2022). Funded by the EU, the plan emphasized digitalization and eco-friendly practices, aiming to diversify tourism and mitigate environmental impacts (Jones, 2022) (Soares , et al., 2021). Complementing this, the 2022 modernization plan prioritized infrastructure upgrades and workforce digital skills (Mileva, et al., 2023).

The 2023 Spanish Sustainable Tourism Strategy 2030 presents a long-term vision focused on sustainable, high-value tourism. Its five strategic pillars—improved governance, sustainability, digital transformation, accessibility, and enhanced visitor experience—align with global sustainability goals. The strategy fosters resilient tourism development through economic, social, and environmental sustainability, preservation of natural and cultural resources, rural revitalization, participatory governance, and adaptation to global challenges (SEGITTUR, et al., 2024).

**Table 1: Spain tourism policies and programs**

<b>Period</b>	<b>Tourism policy</b>
2000-2006	Integral Quality Plan for Spanish Tourism (PICTE)
2007-2020	Spain’s Horizon 2020 Plan
2012-2015	National Integral Plan
2021-	Tourism Recovery-Transformation and Resilience Plan
2022-	Modernization and competitiveness plan for the tourism sector
2023-2030	Spanish Sustainable Tourism Strategy for horizon 2030

Source: Garcia (2014), and adjusted by the authors

### b. Portugal case

Portugal views tourism as a significant economic driver, contributing to GDP growth, balance of payments, and job creation, thereby enhancing national competitiveness. In 2007, the National Strategic Plan for Tourism (PENT) set out five key areas: territory, destinations and products, branding and markets, resource qualification, and innovation. This strategy introduced 10 tourism products, such as beach tourism, gastronomy, and wellness, tailored to each region's unique resources (Remoaldo, et al., 2012). PENT was revised in 2011 and 2013 to address financial market shifts and refine goals through eight development programs and 40 regional projects (Bailoa, et al., 2020).

In 2015, two policy papers, "Tourism 2020" and "Five Elements of a Dream," established five strategic goals: communication, competition, capacity-building, attraction, and cooperation. This was to promote Portugal as Europe's most dynamic travel destination by focusing on principles such as freedom, openness, and collaboration (Pato, et al., 2023).

The 2017 Tourism Strategy for 2027, aligned with European support for 2021-2027, emphasized long-term planning with five strategic pillars: economic growth, knowledge enhancement, networking, territorial development, and national promotion. This strategy aimed to set a stable framework, foster sectoral integration, and enhance cooperation among tourism stakeholders (Bailoa, et al., 2020).

Before COVID-19, tourism in Portugal directly contributed 8.1% of GVA, with 24.63 million visitors and \$20.5 billion in receipts in 2019. The pandemic reduced these numbers to 6.48 million visitors and \$8.8 billion in receipts, but the sector rebounded in 2023 with 26.54 million visitors and \$27.2 billion in receipts (OECD, 2022).

In 2021, Portugal launched the Reactivate Tourism Plan within the Portugal 2030 Strategy and the Sustainable Tourism Plan 2023 to make tourism more competitive and sustainable. Key goals included raising employee qualifications, enhancing year-round tourism, and promoting environmental sustainability through water conservation, waste management, and energy efficiency (Mendes, et al., 2023).

**Table 2: Portugal tourism policies and programs**

Period	Tourism policy
2007-2017	PENT - National Strategic Plan for Tourism
2011-	PENT (1st revision)
2013-	PENT (2nd revision)
2014-2020	Action Plan for Tourism Development in Portugal
2017-2027	Tourism Strategy
2021-	PRT - the Reactivate Tourism: Build the Future Action Plan
2021-2023	Sustainable Tourism Plan

Source : Bailoa et al. (2020)

### c. Morocco case

Many developing nations saw the chance to engage in a sector that would boost their economies, like tourism, in the early 1960s, following the World Bank orders. In this regard, Morocco is among the countries that have always supported the travel and leisure sector. In fact, the tourist industry, following agriculture, has emerged as a structural vector of the nation's economic and social advancement since the establishment of the Ministry of tourism in 1965 with the 1965/67 three-year plan. Contemporary, two subsequent tourism strategic-policies, the 2010 vision and

the 2020 vision, were introduced in the 2000s to reflect the kingdom's interest in the travel and tourist industry (Steenbruggen, 2016).

Vision 2010 set out to attract 10 million tourists in 2010, house 7 million foreign visitors in hotels, reach a capacity of 230,000 beds, construct six large seaside resorts as part of the Azur plan, generate 8.873 billion dollars in foreign exchange earnings, create 600,000 new direct jobs, train 72,000 tourism professionals, and raise the tourism sector's share of GDP from 6.5% to 8.0% (García, 2018).

Almost 9.3 million foreign visitors including 4.9 million foreign visitors and 4.3 million Moroccans living abroad visited the country at the end of 2010. With 8.18 billion dollars in tourism earnings (nearly to the 2010 vision goal) (WBG, 2024).

The assessment of the 2001–2010 tourism policy proved to be highly positive, with an achievement rate of 93% for tourist arrivals, 92% for tourism revenues, and 84.4% for national accommodation capacity. Additionally, 75% of tourism-related jobs and 36.5% of the projected sector contribution to GDP were realized. Regarding coastal resorts, only two began receiving guests before the 2010 deadline: the Saïdia resort (in the province of Berkane) and Mazagan (El Jadida) (Hmioui, et al., 2020).

Despite the advancements of Vision 2010, several limitations were noted. In terms of demand, Morocco remained heavily reliant on traditional European markets (France and Spain) as the main sources of visitors. Furthermore, these tourist flows were largely captured by European tour operators, limiting the diversification of attraction channels. In 2008, the capacity of classified hotel accommodation was highly concentrated in Marrakech and Agadir, which together accounted for 73,000 beds, or 48% of the national supply. This concentration can be explained by a lack of diversification in tourist products, with a primary focus on coastal tourism (Agadir) and cultural tourism (Marrakech). In terms of investment, Vision 2010 favored the development of hotel infrastructure, to the detriment of other segments such as nature tourism, leisure activities, and entertainment. The Azur Plan, the central pillar of this strategy, further accentuated this imbalance by concentrating investments in the South, with the creation of three resorts: Mogador, Taghazout, and Guelmim. Although Vision 2010 helped address some structural obstacles, such as land and administrative constraints, it did not fully respond to major challenges such as diversifying the offering, improving service quality, training, and promoting the sector (Hmioui, et al., 2020).

**Table 3 : Assessment review on the objectives of Vision 2010**

<b>Tourism policy: Vision 2010</b>		
Objectives	Predictions	Achievements
Tourist arrivals	10 million tourists	9.3 million tourists
Tourist revenues	480 billion dirhams	440 billion dirhams
National accommodation capacity	230,000 hotel beds	194,025 hotel beds
Tourism jobs	600,000 jobs	450,000 jobs
Participation in GDP	20% of GDP	7.3% of GDP

Source : García, et al. (2016), OBST (2010)

The 2020 vision main goal was to rank Morocco among the world's top 20 tourism destinations. This tourism policy primary goals include: tripling the number of national air passengers; creating 470,000 new direct jobs; increasing tourism revenues to 15.5 billion dollars by 2020; doubling the number of foreign visitors to 20 million by 2020; doubling the capacity of tourist accommodations with the construction of 200,000 new bed places, including 160,000 hotel beds

and 40,000 tourist residential properties; and increasing the contribution of tourism GDP to national GDP by two percentage points (García, 2018).

The outcomes were not at all what was anticipated. A total of 9.95 billion dollars was earned from tourism at the end of 2019 from roughly 13 million visitors, including 7.1 million foreign visitors and 5.9 million Moroccans living abroad. Also, tourism directly contributed 7% of the national GDP (12% when considering indirect contributions), created 550,000 direct jobs, and generated nearly 80 billion dirhams in annual foreign exchange travel receipts (MTAESS, 2020) (El Menyari, 2021).

The assessment of the Vision 2020 tourism policy appears less positive than that of Vision 2010, with only 65% of arrivals achieved, 62.21% of revenues, and 55% of tourism-related jobs. Additionally, the sector's contribution to GDP reached just 52.43% of the projected target, amounting to 7% of the GDP in 2019. Notably, the national accommodation capacity saw a depreciation of 17.54%, falling from 194,025 beds to 160,000 hotel beds in 2019. Experts viewed the forecasts as overly optimistic, given the highly contrasting outcomes (El Menyari, 2021) (Hmioui, et al., 2020).

**Table 4 : Assessment review on the objectives of Vision 2020**

<b>Tourism policy: Vision 2020</b>		
Objectives	Predictions	Achievements (in 2019)
Ambition	20 most global competitive destinations	Morocco 66th worldwide in the Travel and Tourism Competitiveness Index (TTCI-2019)
Tourist arrivals	20 million tourists	13 million tourists
Tourism revenue (cumulative between 2011-2020)	1000 billion dirhams	622.1 billion dirhams
National accommodation capacity	200,000 new hotel beds	160,000 hotel beds available (including newly built ones)
Tourism jobs	1 million jobs	550,000 jobs
Participation in GDP	150 billion dirhams	81,5 billion dirhams in TGDP <sup>1</sup> , or 7.1% of GDP

Source : El Menyari (2021), MTAESS (2020), Hmioui, et al. (2020), WEF (2019)

Or, after the Covid-19 crisis, this industry found itself bare-handed, forged from audacity and helpless determination in the face of such a massive shock, with the desire for a quick and fruitful reinvention. Thus, a drop of -79% in arrivals has been recorded to receive almost 3 million tourists. While revenues have decreased by 54% to settle at 36.5 billion dirhams compared to the year 2019 (OBST, 2022) (Mirar, et al., 2023).

In August 2020, a recovery program contract for the tourism sector in the post-Covid-19 phase was established by the Ministry of Tourism, containing a set of 21 measures focused on three major objectives: preserving the economic fabric and employment; accelerating the restart phase; and laying the groundwork for a sustainable transformation of the sector (MTAESS, 2020) (Didast, et al., 2023).

<sup>1</sup> TGDP: Tourism Gross Domestic Product

If the observation about the fragility of the tourism sector is correct, then the one about its strong resilience is also true. Namely, 10.9 million tourists visited the country, and 91.3 billion dirhams in tourism revenue were generated during the year 2022. This represents a recovery of 84% and an increase of 15.9% respectively compared to 2019 (OBST, 2022).

In March 2023, the Moroccan government launched the new operational roadmap for 2023-2026, which aims to attract 17.5 million tourists and generate 120 billion dirhams in foreign currency revenue, as well as create 200,000 new direct and indirect jobs through a series of targeted actions across five cross-cutting sectors: air capacity, promotion and marketing, cultural and recreational activities, the national hospitality capacities, and the quality and skills of human capital (MTAESS, 2024).

Additionally, Morocco welcomed a total of 14.53 million visitors and generated 104.6 billion dirhams of tourist receipts in 2023. This represents an increase from 10.9 million visitors and 93.7 billion dirhams in 2022, with a marking growth rates of 11% and 12%, respectively (Tourism Observatory , 2024). Furthermore, the national tourism sector has surpassed its pre-Covid-19 performance, with an additional 1.53 million tourists and 25.94 billion dirhams in revenue compared to 2019 levels (Tourism Observatory, 2020). Despite the pandemic's massive negative impact, the pandemic confirms also the resiliency and the robustness of Moroccan travel and leisure activities.

**Table 5: Morocco tourism policies and programs**

<b>Period</b>	<b>Tourism history and strategic-policies</b>
1918-	Creation of the tourism central committee to create a place for French people to rest. Invest in luxury hotels, transportation, travel administration, and any measure improving the stay of tourists.
1937-	Creation of the Cherifian Office of Tourism in charge of the creation, management, and control of tourist hosting and information organizations and the preservation of historical monuments.
1946-	Creation of the Moroccan National Tourism Office its mission is to promote and market Morocco as a tourist destination, both nationally and internationally.
1965-	Creation of the Ministry of Tourism with the mission of tourism strategic-political governance.
1965-1967	Three-year planification plan recognizing tourism as a priority sector for the Moroccan economy after agriculture.
1968-1972	Five-year plan focusing on creating middle-market hotel capacity due to the lack of existing capacity.
1973-1977 1978-1980	Five-year plan and triennial plan designed to encourage mass tourism. In order to accommodate all socio-professional, average-income tourist categories, medium-category hotels—those with three and four stars—have

	been given preference.
1980-1992	1981-1985 plan and 1988-1992 plan: This period was characterized by the application of the structural adjustment program and by the stagnation of tourism, despite the withdrawal of the public sector.
1993-1999	This was a period of privatization and non-planning in the tourism sector, with a remarkably stagnation of classified hotel capacity.
2000-2010	National tourism policy with the main objective to attract 10 million tourists, indeed 7 million foreign (non-Moroccan) visitors.
2011-2020	New national tourism policy which focuses on sustainability with two core goals, attract 20 million tourists (doubling the market size) and emerge Morocco among the top 20 destinations in the world.
2020-2022	Recovery plan for the tourism sector in the post Covid 19 phase through three major objectives, preserve the economic fabric and employment, accelerate the restart phase, and lay the foundations for a sustainable transformation of the sector.
2023-2026	New ministerial operational roadmap with the aim of attracting 17.5 million tourists.

Source : Raffali (2022), El Menyari (2021), Almeida-García (2018), Steenbruggen (2016), Boujrouf (2005)

#### 4. Methodology

To analyze and explain the strategic determinants that influence the formulation of future tourism policy for Morocco in the lead-up to FIFA World Cup 2030. The research uses a mixt method approach, qualitatively, a benchmark is deployed to distinguish between the case of Morocco, Spain and Portugal. Benchmarking is a research method used to evaluate and compare specific practices, standards, or metrics against recognized or exemplary models in a particular field. Its purpose is to identify best practices, performance standards, and areas for improvement by analyzing comparable data, procedures, or experiences from other countries, organizations, and across different time periods (Carpinetti, et al., 2002).

In this study, a comparison (through convergence and discoveries) is made between the strategic axes or determinants of Spain, Portugal, and Morocco's modern tourism policies, further supported by a network analysis (see table 6 and appendices). These tourism policies (TPs) are selected and ordered based on their long-term strategic perspective, as well as their release and implementation periods (most recent first). Specifically, for Spain, the Tourism Modernization and Competitiveness Plan was released in 2022, followed by the Sustainable Tourism Strategy in 2023. For Portugal, the Tourism Strategy 2027 was released in 2017, and the 2030 Build the Future Action Plan was released in 2021. For Morocco, Vision 2010 was released in 2001, and Vision 2020 in 2011. Additionally, to test the study's hypotheses, the Moroccan Tourism Roadmap 2023-2060 is analyzed through this comparative approach. Also, the research relies

on a hypothetico-deductive methodology, which aims to systematically evaluate hypothesis by deriving specific predictions and testing them against empirical data. In this approach, a hypothesis is proposed based on existing theories or observations, and predictions are logically deduced from it. If these predictions are confirmed through observation or data analysis, the hypothesis gains support; if they are refuted, the hypothesis may need revision or rejection. This methodology enables rigorous, evidence-based conclusions by assessing how well the initial hypothesis aligns with real-world evidence (Sprenger, 2011). To test the hypothesis quantitatively, a dynamic econometric approach is employed using the Generalized Method of Moments (GMM). This method is applied to a panel data set, which facilitates the analysis of both time series and cross-sectional data. This makes it particularly well-suited for tourism activity databases, as is the case in this study.

Dynamic econometric modeling is a quantitative approach used to analyze relationships that evolve over time, often capturing the influence of past values on current outcomes in a panel data framework. In such models, incorporating lagged variables (previous values of the dependent or independent variables) helps account for the persistence of effects, making it possible to understand both short-term and long-term impacts. However, this approach introduces potential endogeneity<sup>2</sup> issues, as past values of variables can be correlated with the error terms in the model (Li, et al., 2021).

The Generalized Method of Moments (GMM) is an estimation technique particularly suited to data-panel models because it can address endogeneity concerns and provide consistent parameter estimates. GMM uses instrumental variables, these variables are correlated with the endogenous regressors but uncorrelated with the error term, to isolate the exogenous variation in the regressors (Wintoki, et al., 2012). In the context of dynamic panel data, GMM exploits lagged values of the variables as instruments, helping to account for the feedback effects and omitted variable bias that could otherwise distort the results. This makes GMM a powerful tool for estimating relationships in dynamic econometric models, especially in policy-oriented research, where the goal is to capture complex interactions over time and ensure reliable, unbiased results (Wintoki, et al., 2012).

Regarding to the problem and objective of this paper, the research applies the mixt methodology, qualitatively, the benchmark compares the tourism policies of selected Mediterranean destinations, with particular attention given to the recent selected tourism policy-strategies. For this purpose, an open (identifying items, idem variables), axial (highlighting plans, idem categories), and selective coding (selecting strategic axes, idem core categories) was conducted using Nvivo. Quantitatively, the performance of dynamic econometric model through the Generalized Method of Moments (GMM), based on the Panel Data method to test the validity of the hypothesis. Eviews is the software used for this econometric investigation.

#### **a. Benchmarking**

To compare the formulation of tourism policies between Morocco, Spain and Portugal, a thematic and content analysis were deployed through a coding approach inspired from the grounded theory. Thematic analysis focuses on identifying, analyzing, and interpreting patterns, or themes, within qualitative data.

This process involves immersing in the data, coding, and grouping codes into overarching themes that capture key aspects of the research topic. Thematic analysis is particularly useful for exploring complex, subjective experiences and understanding recurring ideas across data

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<sup>22</sup> Endogeneity: occurs when an independent variable in a statistical model is related to the error term, causing biased and unreliable results (Li, et al., 2021).

(Vaismoradi, et al., 2013). In this investigation, thematic analysis helps with identifying and structuring the present tourism policies for the three countries.

Content analysis, on the other hand, involves a more systematic approach, often used to measure the frequency and context of specific concepts or variables. This method is beneficial for identifying trends, making comparisons, and quantifying data (Vaismoradi, et al., 2013).

In this study, content analysis allows identifying the variables, the plans and strategic axes of tourism policies formulation across the cases studied. The following table 6 shows the results of the benchmarking analysis:

**Table 6 :Results of tourism policies benchmarking**

<b>Portugal Tourism Strategy - 2027</b>		
<b>Convergences (with Morocco 2010 &amp; 2020)</b>	<b>Disconvergences (with Morocco)</b>	<b>Strategic axes valued</b>
-Emphasis on competitiveness and professionalization	-Governance and legal framework	-Prioritization of Travel & Tourism
-Focus on human capital Development	-Value addition and international profile	-Human resources (training and education)
-Sustainability and environmental considerations	-Sustainability and regeneration	-Safety and security in the destination -CO2 Emissions from Tourism -Percentage of Eco-Certified Hotels
-Promotion and visibility	-Knowledge and innovation	-Marketing expenditure in tourism -Social media integration -Tourist inquiries and bookings
	-Connectivity and mobility	-Transport infrastructure quality -Flight connectivity index
	-Authenticity and preservation	-Heritage site management
<b>Portugal Reactivate Tourism: Build the Future Action Plan - 2030</b>		
<b>Convergences (with Morocco 2010 &amp; 2020)</b>	<b>Disconvergences (with Morocco 2010 &amp; 2020)</b>	<b>Strategic axes valued</b>
-Sustainability and environmental focus	-Building the future of the tourism (finance, knowledge, innovation, qualifications, sustainability)	-Investment in sustainable tourism projects -Renewable energy utilization in tourism
-Cultural heritage and authenticity	-Foster safety (tourism activity and consumer behavior)	-Safety and security in the destination
-Investment in infrastructure	-Generate business (competitiveness of the	-Infrastructure investment level -Number of new business

	destination, mobility, and stimulate demand)	licenses
-Capacity building and human resource development	-Support companies (preservation of employment and operational strategy)	-Number of training programs offered -Employee retention rates in tourism
-Marketing and promotion of destinations	-International campaigns and trade capacity building	-Number of international marketing campaigns -Tourism revenue
-Public-Private Partnerships		-Number of Public-Private Partnerships (PPP) -PPP Investment Levels in Tourism
<b>Spain Modernization and competitiveness plan for the tourism sector - 2022</b>		
<b>Convergences (with Morocco 2010 &amp; 2020)</b>	<b>Disconvergences (with Morocco)</b>	<b>Strategic axes valued</b>
-Digital transformation	-Independent plan for tourism competitiveness	-Digital adoption rates in tourism
-Sustainability initiatives	-Financing competitiveness (state financial fund for tourism competitiveness - FOCIT)	-Tourism competitiveness index -Funding levels for sustainability initiatives
-Financial structuring	-Digitalization and tourism intelligence program	-Success rates of funded digital tourism projects
-Competitiveness and destination Appeal	-Tourism resilience strategies for extra-peninsular territories	-Market share of major destinations -Financial capacity and resilience for tourism businesses
	-Transformation of the tourism model to environmental, socioeconomic, and territorial sustainability	-Business continuity plan adoption rates -New tourism projects generating rates
	-Resilience and adaptation	-Resilience rates for tourism businesses (e.g., recovery rates) -Resilience strategy implementation Rates
<b>Spanish Sustainable Tourism Strategy - 2030</b>		
<b>Convergences (with Morocco 2010 &amp; 2020)</b>	<b>Disconvergences (with Morocco)</b>	<b>Strategic axes valued</b>
-Competitiveness and innovation	-Transformation of the tourism model to environmental,	-Business continuity -New tourism projects

	socioeconomic, and territorial sustainability	
-Governance and partnership	- Competitiveness and innovation	-Innovation index in tourism -New tourism products
-Sustainability	-Sustainable growth	-Growth of sustainable tourism sector -Visitor satisfaction on sustainability initiatives
-Product diversification	-Improving employment quality	-Variety of tourism products offered -Rates of local communities' integration in tourism
-Marketing effort	-Promote sustainability as a brand value	-Marketing spend efficiency (ROI) -Compliance rates with sustainable tourism regulations
-Tourism intelligence	-Strategic approach to sustainability	
	-Adaptation of existing regulations to the new tourist environment	
	-Increasing international influence through tourism (as soft power)	-Tourism diplomacy metrics (e.g., partnerships with other countries)

Source: Authors

NB: The details of the Morocco, Portugal and Spain tourism policies comparison in terms of strategic axes, plans and variables are illustrated by the appendix 1,2 and 3.

### **b. Data and statistical specification**

After highlighting with the use of a benchmarking analysis, the various tourism policy strategic axes, plans and items for Spain and Portugal in comparison with the Moroccan case. The study identified a wide number of variables that must be tested to confirm their validity for the formulation Morocco's future TP. All these ones are part of Travel and Tourism Competitiveness index (TTCI), and Travel and Tourism Development Index (TTDI).

Following the Generalized Method of Moments (GMM), the research protocol is presented as: (1) Collecting data selected by the benchmarking analysis from the TTCI and TTDI open-access databases, (2) Preparing the Data-Panel by combining all these variables (including the natural logarithm and adding the lagged variables), (3) Conducting an all unit root test to confirm stationarity, (4) Conducting a normality test, (5) Applying the Fixed Effect test based on the outputs of the all unit root test and the normality test (with selected variables at a 5% level of significance), and (6) Performing the GMM test using the instruments chosen by the Fixed Effect test (with a 5% level of significance).

**Table 7 : Details of the variables selected for the GMM test**

Variable	Description	Sources	Database
Tourist arrivals (TA)	This is the quantitative, physical, and/or monetary expression of tourist demand in a given destination.	Moroccan tourism ministry	<a href="https://mtaess.gov.ma/fr/tourisme/chiffres-cles/">https://mtaess.gov.ma/fr/tourisme/chiffres-cles/</a>
Air Transport Infrastructure (ATI)	Refers to the facilities, systems, and services that support air travel and connectivity for tourists, including airports, runways, air traffic management, and ground transportation links.	The World Economic Forum	TTCI and TTDI
Cultural Resources (CR)	Are the tangible and intangible assets that represent a destination's heritage, identity, and cultural significance, including historical sites, museums, traditional practices, art, and festivals.	The World Economic Forum	TTCI and TTDI
Health and Hygiene (HH)	Refers to the measures and practices implemented to ensure the safety and well-being of travelers, including sanitation standards, cleanliness of accommodations and public spaces, food safety protocols, and health services.	The World Economic Forum	TTCI and TTDI
Human Resources (HR)	The workforce involved in the tourism industry, encompassing all personnel engaged in providing services to travelers, including management, hospitality staff, tour guides, and customer service representatives.	The World Economic Forum	TTCI and TTDI
ICT Infrastructure (ICTINF)	Refers to the technological systems and services that support the management, distribution, and communication of tourism-related information.	The World Economic Forum	TTCI and TTDI
Natural Resources (NR)	Are the environmental assets and features that attract visitors and contribute to their experiences, including landscapes, wildlife, forests, beaches, etc.	The World Economic Forum	TTCI and TTDI
Policy Rules and Regulations	The guidelines, laws, and standards established by governments and regulatory bodies to manage and govern tourism activities.	The World Economic Forum	TTCI and TTDI

(PRR)			
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Source: authors

**Table 8 : Tests of Normality**

	Kolmogorov-Smirnov <sup>a</sup>			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Lag-ta	.184	151	.000	.806	151	.000
Lag-PRR	.220	151	.000	.608	151	.000
Lag-HH	.118	151	.000	.952	151	.000
Lag-ATI	.098	151	.001	.946	151	.000
Lag-ICTINF	.141	151	.000	.901	151	.000
Lag-NR	.061	151	.200*	.989	151	.252
Lag-CR	.138	151	.000	.903	151	.000
Lag-HR	.119	151	.000	.971	151	.003

\*. This is a lower bound of the true significance.

a. Lilliefors Significance Correction

Source: Authors

**Table 9 : Nonparametric tests**

**Hypothesis Test Summary**

	Null Hypothesis	Test	Sig.	Decision
1	The distribution of Lag-ta is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
2	The distribution of Lag-PRR is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
3	The distribution of Lag-HH is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
4	The distribution of Lag-ATI is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
5	The distribution of Lag-ICTINF is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
6	The distribution of Lag-NR is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.003	Reject the null hypothesis.
7	The distribution of Lag-CR is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.
8	The distribution of Lag-HR is the same across categories of Country.	Independent-Samples Kruskal-Wallis Test	.000	Reject the null hypothesis.

Asymptotic significances are displayed. The significance level is .050.

Source: Authors

The normality assessment (table 8) conducted through both Kolmogorov-Smirnov (with Lilliefors correction) and Shapiro-Wilk tests indicates significant deviations from normality across most log-transformed variables ( $p < .001$ ), with lag-nr showing a slightly higher but still

significant p-value ( $p < .003$ ). Despite the logarithmic transformation applied to the variables (TA, GDPPC, MS, RPEX, GCI\_INF, GCR\_INF, GI, and IF), the consistently low significance values for both tests suggest rejection of the null hypothesis of normal distribution.

Also, in table 9, The hypothesis test summary presents the results of Kruskal-Wallis tests conducted across multiple variables to examine distributional differences among country categories. The selection of this nonparametric test is particularly appropriate given the earlier normality test results which indicated violations of normality assumptions.

All eight variables (LN TA, LN GDPPC, LN MS, LN RPEX, LN GCI\_INF, LN GCR\_INF, LN GI, and LN IF) demonstrate statistically significant differences across country categories ( $p < .001$ ), leading to consistent rejection of all null hypotheses. The combined results from both the normality tests and nonparametric tests provide strong justification for employing the Generalized Method of Moments (GMM) estimation approach in this context.

In order to estimate the parameters related to the dynamic panel data model using the Generalized Method of Moments (GMM). The following model equation is specified:

$$TA_{it} = \alpha + \beta_1 LTA_{-1it} + \beta_2 ATI_{it} + \beta_3 CR_{it} + \beta_4 HH_{it} + \beta_5 HR_{it} + \beta_6 ICTINF_{it} + \beta_7 NR_{it} + \beta_8 PRR_{it} + \epsilon_{it}$$

Where:

- $TA_{it}$ : Tourist arrivals for unit  $i$  at time  $t$ .
- $LTA_{-1it}$ : Lagged tourist arrivals for unit  $i$  at time  $t-1$ .
- $ATI_{it}$ : Air Transport Infrastructure for unit  $i$  at time  $t$ .
- $CR_{it}$ : Cultural Resources for unit  $i$  at time  $t$ .
- $HH_{it}$ : Health and Hygiene for unit  $i$  at time  $t$ .
- $HR_{it}$ : Human Resources for unit  $i$  at time  $t$ .
- $ICTINF_{it}$ : ICT Infrastructure for unit  $i$  at time  $t$ .
- $NR_{it}$ : Natural Resources for unit  $i$  at time  $t$ .
- $PRR_{it}$ : Policy Rules and Regulations for unit  $i$  at time  $t$ .
- $\epsilon_{it}$ : Error term.

The coefficient  $\beta(x)$  of all these variables is expected to be positive.

## 5. Results

The analysis conducted (in table 10) for the period between 2007 and 2023, across 24 countries (which are the source markets of Moroccan tourism demand), using the Generalized Method of Moments (GMM) on the panel dataset. It reveals the significant determinants impacting tourist arrivals, which are similarly, the strategic axes of Morocco's tourism policy formulation.

**Table 10 : GMM Parameters estimation**

LAG_TA(-1)	0.117511	0.026422	4.447414	0.0000	Lagged tourist arrivals
LAG_ATI	840083.1	265294.9	3.166601	0.0021	Air Transport Infrastructure
LAG_CR	4940836.	740648.1	6.670963	0.0000	Cultural Resources
LAG_HH	433457.0	505274.0	0.857865	0.3931	Health and Hygiene
LAG_HR	14980173	1302313.	11.50275	0.0000	Human Resources
LAG_ICTINF	3787916.	751071.3	5.043351	0.0000	ICT Infrastructure
LAG_NR	4817548.	1004256.	4.797132	0.0000	Natural Resources
LAG_PRR	699280.1	246883.4	2.832430	0.0056	Policy Rules and Regulations
Effects Specification					
Cross-section fixed (first differences)					
Mean dependent var	397012.9	S.D. dependent var	2138214.		
S.E. of regression	3267324.	Sum squared resid	1.01E+15		
J-statistic	14.25268	Instrument rank	24		
Prob(J-statistic)	0.579896				

Source: Authors

The results indicate that the lagged dependent variable, LAG\_TA(-1), has a positive and statistically significant coefficient of 0.117511 (p-value = 0.0000). This suggests that an increase in tourist arrivals in the previous period positively influences current arrivals, highlighting the persistence in tourist behavior. Additionally, the variable LAG\_ATI (Air Transport Infrastructure) displays a significant positive effect on tourist arrivals, with a coefficient of 840083.1 and a p-value of 0.0021. This finding underscores the critical role of infrastructure in facilitating tourism, as improved air transport can enhance accessibility and attract more visitors.

Cultural resources also emerge as a vital determinant, with a coefficient of 4940836.0 for LAG\_CR and a t-statistic of 6.670963 (p-value = 0.0000). This result suggests that the richness and availability of cultural offerings significantly contribute to attracting tourists, emphasizing the importance of cultural engagement in tourism strategies.

Human resources show a noteworthy positive relationship with a coefficient of 14980173 and a t-statistic of 11.50275 (p-value = 0.0000), further emphasizing the necessity for well-trained personnel in the tourism sector. The results for ICT infrastructure (LAG\_ICTINF) also indicate a significant positive impact on tourist arrivals, with a coefficient of 3787916.0 (p-value = 0.0000), highlighting the importance of digital infrastructure in enhancing tourist experiences and interactions.

Similarly, natural resources (LAG\_NR) and policy rules and regulations (LAG\_PRR) demonstrate significant positive relationships with coefficients of 4817548.0 (p-value = 0.0000) and 699280.1 (p-value = 0.0056), respectively. These findings suggest that effective policies and the preservation of natural resources are crucial for attracting tourists. Conversely, the variable representing health and hygiene (LAG\_HH) does not exhibit a statistically significant impact (p-value = 0.3931).

However, following its qualitative relevance (benchmarking), the investigation conserves the use of health and hygiene as a strategic axes for formulation future Morocco's tourism policy, especially after Covid—19 crisis. Instead, its statistical coefficient is due to the lack of the data for the Moroccan context.

The validity of the model specifications is supported by the J-statistic of 14.25268 and a corresponding p-value of 0.579896, indicating that the over-identifying restrictions imposed by the instruments are valid. The instrument rank of 24 further suggests that there are sufficient

instruments to identify the model parameters adequately. However, the high residual variance, evidenced by a sum of squared residuals of 1.01E+15, indicates that there may be significant variation in tourist arrivals that the model does not fully capture.

$$\text{scalar pval} = @\text{chisq}(14.25268, 15)$$

$$\text{PVAL} = 0.506458$$

The validity of Generalized Method of Moments (GMM) estimation depends on certain assumptions, notably the validity of the instruments used. The Sargan-Hansen test, a common diagnostic tool in econometrics, assesses whether these instruments are valid by evaluating the over-identifying restrictions in the model. Specifically, it tests for the correlation between the instruments and the error term. In this analysis, the Sargan-Hansen test resulted in a p-value of 0.506458, calculated from the J-statistic (14.25268) compared to a Chi-square distribution with 15 degrees of freedom. This p-value, being greater than conventional significance levels (e.g., 0.05), indicates that we fail to reject the null hypothesis, suggesting that the instruments are uncorrelated with the error term and thus valid.

## 6. Hypothesis testing, policy implications, discussion and limitations

The Moroccan Tourism Roadmap 2023-2026 incorporates key elements identified by policymakers as crucial for the recovery, emergence, and development of the national tourism sector. Table 11 presents a comparison between the strategic axes outlined in Morocco's roadmap and the strategic axes derived from the qualitative and quantitative investigation, aiming to confirm one of the research hypotheses.

**Table 11: Hypothesis testing and policy implications**

1-Moroccan tourism roadmap 2023-2026 strategic axes	2-Investigation implications for policy-makers (results of benchmarking and econometric study)
Air capacity	Air transport infrastructure
Cultural and recreational activities	Natural and cultural resources
Quality and skills of human capital	Human resources
National hospitality capacities	ICT Infrastructure
Promotion and marketing	Health and hygiene
	Policy rules and regulation
<b>Second hypothesis is confirmed</b>	

Source: Authors

Regarding the results, and considering the convergence of factors, such as air transport infrastructure, natural and cultural resources, human capital quality and skills, promotion and marketing, and hospitality capacities, the study confirms the second hypothesis. The 2023-2026 roadmap, which outlines Morocco's tourism planning vision, does not sufficiently address the national tourism development challenges in terms of sustainability and competitiveness, especially when compared to Spain and Portugal's policies for the 2030 FIFA World Cup.

To effectively address the pressures of global sustainability and competitiveness, Morocco's future tourism policy must swiftly integrate broader, more innovative approaches. In particular, prioritizing the adoption of advanced Information and Communication Technology (ICT) infrastructure, including Digital Tourism Platforms and Smart Tourism Systems (STS), is essential. These technologies would digitalize decision-making processes, enable real-time market analysis, and improve the tourist experience by streamlining and globally disseminating

services such as transportation, booking, and promotion, thereby enhancing efficiency and satisfaction for both tourists and service providers.

Another critical aspect is the prioritization of travel and tourism activities through the establishment of clear policy rules and regulations. This strategic pillar aligns with concerns raised by the National Court of Auditors, which has emphasized the insufficient tourism planning and development programs at the regional and local levels (Court of Auditors, 2023).

Moreover, the lack of health and hygiene plans integrated into the diverse tourism activities, particularly post-COVID-19, is an important area where Morocco falls behind its Mediterranean competitors, namely Spain and Portugal. These countries are already well-grounded in their tourism policies for the 2030 horizon, with comprehensive health and hygiene action-plans embedded in their tourism strategies. This presents a significant gap that Morocco must address to stay competitive in the global tourism market leading up to the 2030 FIFA World Cup.

Also, these findings highlight that while Morocco's 2023-2026 tourism roadmap addresses key elements for recovery and development, it still falls short in key areas such as ICT infrastructure, health and hygiene integration, and policy regulation. With the FIFA World Cup 2030 approaching, these gaps could hinder Morocco's ability to meet the expected surge in tourism demand and global competitiveness. To capitalize on the tournament's tourism impact, Morocco must quickly enhance its strategies, integrating digital technologies and robust health infrastructure and protocols, while fostering a more diversified and sustainable tourism offering. This would help Morocco align with the standards set by Spain and Portugal and fully leverage the World Cup's potential benefits.

## **7. Conclusion and limitations**

The tourism sector is an integral part of economic, social and societal well-being of the Moroccan society (Sahho, et al., 2021). The development of this sector is incarnated by several historical and recent tourism policies, programs and plans (Almeida-García, 2018). In 2030, Morocco will organize the FIFA World Cup in side of Spain and Portugal, both are a worldest competitive tourism countries, especially for Spain with a total of more than 85 million tourist arrivals and 108.8 billion euros of tourism expenditures in 2023 (OECD , 2024).

These two Mediterranean tourism leaders have already implemented long-term tourism policies, with a special focus on sustainability and competitiveness criteria. Namely, Portugal 2030 - Build the Future Action Plan, and Spanish Sustainable Tourism Strategy 2030.

To investigate the research problem, objective and hypothesis, the study applies a mixed methodology, through the combination of the qualitative benchmarking to compare the aspects of future tourism policies formulation between Morocco, Spain, and Portugal. Also, a dynamic econometric modelling using a data panel analysis by applying the Generalized Method of Moments, to test and validate the theoretical studied determinants. To adequately formulate a future Moroccan tourism policy, and in addition to sustainability and competitiveness factors, a set of determinants must me taking in consideration. Air transport infrastructure, natural and cultural resources, human resources, ICT Infrastructure, health and hygiene, policy rules and regulation (prioritization of travel and tourism activities in the country).

The research concludes that the strategic axes of the Moroccan tourism Roadmap 2023-26 are well planned, but insufficient to enhance the sector's development in comparison with Mediterranean leader destinations (confirming the second hypothesis). The future TP must acknowledge the core role of ICT infrastructure, for example, developing a tourism intelligent system (SIT). Also, health and hygiene by implanting an integral plan to promote the public sanitary and safety equipment of Morocco. And policy rules and regulation through the

prioritization of the tourism sector in the national, regional and local activities, as part of the daily nation-life or even a Soft-Power of the country (Spain, Portugal and China are an example of this pillar).

The study considers a set of limitations that occur from diverse sources. First, the qualitative benchmarking focus only on the Spain and Portugal tourism policies and covering the most recent ones, the exhaustivity and inclusion of a broader factors is also critical due to potential bias of coding process (open, axial, selective). In addition, data collection is limited to the pillars of Travel & Tourism Competitiveness index (TTCI from 2007 to 2020), and Travel & Tourism Development index (TTDI from 2021 TO 2024). This transition generated new destinations sustainability and competitiveness factors, but their data is period lacking.

As a result, in light of the hypothesis regarding the strategic insufficiency of Morocco's national tourism roadmap for 2023-26, and considering the horizon of the FIFA World Cup 2030, the selected determinants for formulating Morocco's tourism policy, when compared to Spain and Portugal are confined to the most statistically significant factors. This highlights an opportunity for further research to address the sustainable and competitive elements, which should become integral components of future national tourism policy frameworks. To leverage the FIFA World Cup 2030 as a catalyst for sustainable tourism growth, Morocco must adopt a holistic policy framework that integrates digital transformation, governance reforms, and health security—ensuring long-term competitiveness in the global tourism landscape.

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**Appendix 1: Network analysis of Morocco's vision 2010 & 2020**



**Appendix 2: Network analysis of Portugal 2027 Tourism Strategy & Portugal 2030  
 Reactivate Tourism: Build the Future Action Plan**



**Appendix 3: Network analysis of Spain 2022 Modernization and competitiveness plan  
 for the tourism sector & Spanish Sustainable Tourism Strategy 2030**

