

Tourism Investment in Algeria: Bridging the Gap Between Potential and Performance in the SDAT 2030 Framework

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Abstract :

This study focuses on tourism investment environment in Algeria and its potential to drive economic diversification beyond hydrocarbon reliance. The study used a mixed methodology, reviewing the official tourism statistics (2018-2025) and legislative frameworks and the Tourism Development Master Plan (SDAT 2030) to evaluate the current performance in relation to the strategic goals. Even with recent legislative changes under the 2022 Investment Law and the ambitious target of reaching 12 million visitors annually rather than 2.5 million by 2030, research indicates that there are still ingrained issues: tourism has become a mere contributor to GDP at 1.47% in 2023 compared to the Mediterranean average of 10%, accommodation facilities are critically inadequate at 0.1 hotel rooms per 100 inhabitants and 66% of registered tourism projects are either not started or uncompleted. The study concludes that although Algeria holds considerable comparative advantages in desert, coastal and heritage tourism, the opportunities in the country could only be actualised by overcoming the shortcomings in infrastructure, institutional coordination and international marketing.

Keywords : Algeria , Economic diversification, SDAT 2030, Tourism investment, Tourism infrastructure.

JEL Classification Codes: L83, O25, O53.

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1. Introduction:

Algeria finds itself at a pivotal point in its economic growth. The economy of the country has long relied heavily on the export of hydrocarbons, whose contribution to export earnings and state revenues was between 95 and 60 percent. This extreme dependence on oil and gas has left Algeria vulnerable to volatile global energy markets, price fluctuations, and the eventual depletion of fossil fuel reserves. Economic diversification is no longer optional it has become essential for long term stability and prosperity. Tourism is one of the most potential but under-explored diversification opportunities. Algeria possesses great tourism development resources. Its strategic Mediterranean location bridges Europe and Africa. The country boasts over more than 1,200 kilometres of coastline. Thermal springs, mountain ranges, and incredible desert landscapes are found in the enormous Sahara Desert which occupies 83 percent of the national territory. UNESCO World Heritage sites include the M'Zab Valley and Tassili n'Ajjer, among other places. However, despite these natural and cultural resources, Algeria's tourist industry still underdeveloped and marginal to the nation's economy.

Recent years have seen renewed governmental commitment to tourism development. The 2022 Investment Law introduced a modernized regulatory framework emphasizing investment freedom, transparency, and equal treatment of domestic and foreign investors. The government established 249 Tourism Expansion Zones across the country and initiated visa facilitation programs, including visa-on-arrival for desert tourism destinations. The creation of the Algerian Investment Promotion Agency aimed to streamline investment processes. Furthermore, the Tourism Development Master Plan (SDAT 2030) set ambitious objectives: increasing annual tourist arrivals from 2.5 million to 12 million by 2030, raising tourism's contribution in GDP from 1.5% to 10%, and expanding accommodation capacity from 140,000 to 250,000 beds.

However, the performance of Algeria remains significantly below its potential and regional standards. Tourism provided only 1.47 percent of GDP in 2023, far below the 10 percent Mediterranean regional average with total arrivals reaching 3.5 million, which was post pandemic recovery, but remained modest in comparison with regional competitors. During the same year, Morocco received a total of over 14 million visitors compared to the 9 million tourists that Tunisia received. The World Economic Forum's Travel & Tourism Development Index 2024 ranked Algeria 98th globally among 119 economies, with a score of 3.42 on a 1-7 scale (World Economic Forum, 2024). This left Algeria lagging behind some of the important competitors in North Africa and demonstrated structural issues that remained: inadequate infrastructure, visa facilitation barriers, and deficiency in international marketing (World Economic Forum, 2024). Against this context of high potential and underwhelming performance, there is high investment activity and continued implementation challenges and high strategic objectives are facing huge structural barriers. This leads to a fundamental question Which is: Can Algeria's current tourism investment framework and strategic planning effectively transform the sector into a viable pillar of economic diversification by 2030? What critical barriers must be addressed to bridge the gap between tourism potential and actual performance?

This study examines Algeria's tourism investment landscape comprehensively. The research analyses several key dimensions. First, it examines the legislative and institutional framework governing tourism investment. Second, it assesses current tourism performance across key indicators arrivals, economic contribution, employment generation and accommodation infrastructure. Third, it evaluates the implementation status of registered tourism projects. Fourth, it examines the strategic vision articulated in SDAT 2030 and its operational mechanisms. Finally, it identifies critical challenges constraining tourism investment effectiveness and sector development. Through this systematic analysis, the study provides evidence-based insights into Algeria's tourism

investment trajectory and offers policy recommendations for enhancing the sector's contribution to sustainable economic diversification.

2. Tourism Investment: An Academic Overview:

Tourism investment represents a crucial strategy for enhancing tourism activities by providing new opportunities for tourism establishments and visitors alike. This form of investment plays a vital role in developing and strengthening the tourism industry, offering competitive investment opportunities in the global tourism market.

2.1. Defining Tourism Investment

Tourism investment holds significant importance in advancing the tourism sector. The World Tourism Organization defines it as an investment in tourism development that addresses the needs of tourists and host destinations while preserving future opportunities (Cooper et al., 2008). This approach involves managing resources to satisfy economic, social, and cultural requirements while maintaining environmental integrity, biodiversity, and life support systems. From an operational perspective, tourism investment involves the establishment of tourism facilities according to hospitality standards and general investment principles (Hall & Page, 2014). These facilities are typically developed within designated tourism expansion zones and rely on prepared tourism real estate for implementing specific programs outlined in tourism development plans. Furthermore, tourism investment can be understood as the purposeful capability to build both physical and human capital within the tourism field (Sharpley & Telfer, 2015). The primary objective is to increase and enhance production capacity, operational efficiency, and service delivery through constructing hotels, tourism complexes, restaurants, and recreational areas, alongside developing specialized and competent tourism personnel.

2.2. Characteristics of Tourism Investments

Tourism investments possess several distinctive features that differentiate them from other types of investments (Williams & Lew, 2014):

- **Long term Fixed Asset Nature:** Tourism investments typically involve fixed assets with extended lifespans ranging from 20 to 25 years, exposing them to various political and social changes with varying degrees of risk.
- **Delayed Return on Investment:** The lengthy investment period means that financial returns materialize gradually rather than immediately.

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- **Limited Product Flexibility:** Unlike other business ventures, tourism investments cannot easily modify their offerings or shift to alternative projects.
- **High Operational Standards:** These investments require elevated levels of operational management and trained, qualified personnel to maintain service quality.
- **Economic Contribution:** Tourism investments support national economies by creating employment opportunities and contributing to tourism-related income.

2.3. Investment Areas in Tourism

Tourism investment spans multiple domains (Goeldner & Ritchie, 2012):

- ❖ **Accommodation Services:** This sector includes hotels, motels, prepared tourist houses, rest houses, tourism complexes, tourism cities, tourism villages, and various supplementary accommodation facilities.
- ❖ **Recreation and Leisure Services:** These encompass cafes, restaurants, tourism swimming pools, tourist rest stations, therapeutic mineral water facilities, and similar recreational venues.
- ❖ **Transportation and Communication Infrastructure:** This area comprises three main categories:
 - **Government Investments:** Development of civil airports, seaports, river docks, river boat stations, and ferry terminals.
 - **Communication Services:** Establishment of postal and communication points within tourism facilities.
 - **Road Infrastructure:** Construction of dedicated roads for tourism purposes.
- ❖ **Education and Research:** This domain includes tourism colleges, institutes, study centres, and vocational training programs aimed at developing advanced tourism personnel (Tribe, 2011). It also encompasses study abroad programs, contracts with tourism organizations for staff training, and hosting tourism professionals to benefit from their expertise.
- ❖ **Administrative and Complementary Services:** This sector involves constructing buildings and offices designated for tourism facilities, maintaining these structures, and providing necessary administrative equipment, devices, and communication networks.
- ❖ **Tourism Promotion and Marketing:** This area covers information and tourism service centres, tourism booking offices, and all expenditures allocated for tourism promotion and marketing communications.
- ❖ **Tourism Research and Surveys :** This encompasses all expenditures dedicated to conducting tourism surveys, preparing statistics on tourism activities, and related research necessary for

success whether for tourism projects or for gathering visitor feedback and studying their suggestions.

3. Investment Incentives in Algeria's Tourism Sector: Current Framework and Performance:

3.1. Legislative Framework and Recent Reforms

Algeria has undertaken substantial reforms to position its tourism sector as a strategic pillar of economic diversification. In July 2022, the Algerian government published a new Investment Law (Law N° 22-18) that modernized the 2016 legislation, establishing fundamental principles of "freedom of investment" and "transparency and equality in the treatment of investments" for both residents and non-residents (U.S. Department of State, 2024). This law aims to define the rights and obligations of investors and the incentive schemes applicable to investments in economic activities related to the production of goods and services (UNCTAD, 2022) (AlgeriaInvest . 2022. August 1).

The 2022 Investment Law identifies three distinct categories of investments eligible for incentives: industry-specific projects including tourism, mining, energy, and information technology; zone-specific projects implemented in Algeria's highlands and southern regions; and structured projects capable of offering at least 500 job openings with an investment amount of at least DZD10 billion (Wang & Wu . 2023, January 5).). Following the publication of the Investment Law in July 2022, the government published eight implementing decrees in September 2022, providing key provisions related to the institutional framework, incentive regimes, conditions of eligibility, and guarantees granted to investors (UNCTAD, 2022).

3.2. Current Investment Performance and Ambitious Targets

Algeria's tourism sector has experienced remarkable growth in recent years. In 2024, Algeria's tourism sector witnessed unprecedented growth, with more than 3.5 million tourists visiting the country, including 2.45 million foreign nationals and over 1.09 million expatriates returning to explore their homeland (DzairTube, 2025). This represents a significant milestone reflecting the impact of state-led reforms and rising foreign interest (DzairTube, 2025). Algeria is currently implementing 582 tourism projects out of 2 562 approved projects, which are expected to add approximately 70 000 new beds by the end of 2025, increasing total accommodation capacity from 140 000 beds to over 210 000 beds (DIVAN Centre, 2025). More than 8 400 tourism projects have been registered with the government, which are expected to create 210 000 direct jobs (Travel and Tour World. 2024, August 23). The government has set ambitious targets to increase annual visitor numbers from 2.5 million in 2023 to 12 million by 2030, representing a fivefold increase.

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In March 2025, the newly created Algerian Investment Promotion Agency (AAPI) reported that it approved 743 projects worth approximately \$6.5 billion in the first two months of 2025 alone, demonstrating the accelerated pace of investment activity (Kawach, 2025. July 15). Looking toward 2025, the National Tourist Office greenlit 70 new investment projects, bringing the total number of active tourism projects to 2 143 (DzairTube .2025).

3.3. Comprehensive Tax Incentives and Financial Support

The Algerian government provides substantial fiscal incentives specifically designed for the tourism sector. Tourism activities benefit from preferential tax treatment, with corporate tax rates set at 19% compared to 25% for other sectors. Additional incentives are available for investments made outside Algeria's coastal regions, including the reduction of tenancy fees to a symbolic one dinar (USD 0.01) per square meter of land for 10 years in the High Plateau region and 15 years in southern Algeria, with a 50% reduction thereafter (U.S. Department of State, 2024).

Tourism establishments created by national or foreign entrepreneurs qualify for ten-year exemptions from corporate taxes, with similar exemptions applied to income tax for companies established by national investors. However, these exemptions typically exclude travel agencies and certain mixed economy companies. Permanent exemptions from professional activity fees apply to tourism, hotel, and spa activities, while a reduced value-added tax rate of 7% is applied to tourism, hotel, and spa services, as well as classified tourism restaurants, travel services, and tourism vehicle rental operations. "Exceptional" incentives apply for investments "of special interest to the national economy," including the extension of common tax incentives to 10 years, with specific sectors of "special interest" listed in the investment law (U.S. Department of State, 2024). The foreign investor must bear at least 25% of the overall cost of the investment to benefit from the guarantee of transfer of invested capital and income derived from it (UNCTAD, 2022).

3.4. Strategic Development Initiatives and Institutional Reforms

The government has designated 249 zones for tourism expansion across different regions, offering diverse experiences from coastal to mountain and thermal tourism (Travel and Tour World. 2024, August 23). This strategic zoning approach reflects a comprehensive territorial development strategy aimed at distributing tourism benefits across the country's varied geographical regions. The new Investment Law establishes a restructured institutional framework by renaming the former National Investment Development Agency as the Algerian Investment Promotion Agency (AAPI) and creating the High National Commission for Investment Appeals (Law.asia, 2023).

The National Investment Council is responsible for formulating the national investment strategy, while AAPI handles investment registration, administers incentives, and manages a digital platform for investors. The government is actively pushing for the digitization of investment processes, creating a unique digital framework to streamline investment opportunities and procedures, designed to enhance transparency and ensure equal treatment for all investors (Travel and Tour World. 2024, August 23). This technological modernization represents a significant step toward international best practices in investment facilitation.

Beyond traditional tourism investment structures, Algeria's emerging startup ecosystem presents opportunities for tourism innovation and digital service development. Recent analysis by Badreddine (2023) of Algeria's startup regulatory framework reveals both progress and persistent challenges in entrepreneurship support mechanisms. The research identifies critical gaps in incubation structures, acceleration programs, and financing formulas adapted to high growth ventures.

4. Analytical Assessment of Tourism Investment in Algeria: Current Status and Future Prospects :

Despite possessing considerable comparative advantages in terms of geographic location and cultural diversity, Algeria's position in international tourism remains significantly below its potential. Recent data from the World Economic Forum's *Travel & Tourism Development Index 2024 (TTDI)* show that Algeria was newly ranked at **98th globally** among 119 economies, with a score of approximately 3.42 on a 1-7 scale, placing it behind key North African competitors such as Morocco and Tunisia (World Economic Forum, 2024) . The inclusion of Algeria in the 2024 index reflects growing interest in the country's tourism sector, yet the structural gaps remain: inadequate infrastructure, visa facilitation hurdles and low investment in international marketing continue to hamper progress. In practical terms, Algeria attracted only about 3.3 million foreign visitors in 2023, far fewer than its regional peers, while setting an ambitious national target of 12 million tourists by 2030 (Boumzar , June 3. 2024). Accordingly, this section examines current tourism investment in Algeria through key performance indicators and situates the nation's strategic vision for sector development through 2030 against the benchmarks and recommendations laid out in the TTDI 2024.

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4.1. Tourism Performance Indicators in Algeria

4.1.1. Tourist Arrival Patterns and Trends

The movement of tourists toward Algeria experienced substantial fluctuations between 2018 and 2023, largely influenced by the global COVID-19 pandemic. During the pre-pandemic period, Algeria received 2.66 million total visitors in 2018, comprising 2.02 million foreign tourists and 638 360 Algerian residents living abroad (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). However, the pandemic's impact became evident as tourist arrivals plummeted to 591 031 in 2020 and further declined to just 125 238 in 2021.

Table 1. The flow of tourists to Algeria during the period from 2018 to 2023

<i>Year</i>	<i>Number of foreign tourists</i>	<i>Tourists residing abroad</i>	<i>Total</i>
2018	2.018.753	638.360	2.657.113
2019	1.933.778	437.278	2.371.056
2020	509.736	81.295	591.031
2021	66.995	58.243	125.238
2022	757.380	640.668	2.039.444
2023	2.519.195	1.096.989	3.508.292

Source : Ministry of Tourism and Traditional Handicrafts, Algeria

The post-pandemic recovery phase demonstrated remarkable resilience. By 2023, Algeria recorded 3.5 million international arrivals, with 2.5 million coming from abroad, representing a 65% increase compared to the previous year (DzairTube . 2025). This recovery trajectory continued into 2024, with the country welcoming over 3.5 million tourists, including 2.45 million foreign nationals and 1.09 million expatriates returning to explore their homeland (DzairTube. 2025). These figures indicate that tourism demand has not only recovered but exceeded pre-pandemic levels, suggesting growing international interest in Algeria as a tourism destination.

4.1.2. Specialized Tourism Segments: The Sahara Desert Experience

The Sahara desert tourism season represents a distinctive segment of Algeria's tourism portfolio. Between 2018 and 2023, desert tourism experienced considerable variability, initially affected by the pandemic but showing strong recovery subsequently. The 2018/2019 season attracted 93 765 visitors (84 581 residents and 9 184 foreign tourists), while the 2019/2020 season saw significant growth with 264 428 visitors.

Table 2. Number of tourists during the Saharan tourism seasons for the period 2019–2023

<i>Year</i>	<i>Residents</i>	<i>Foreign tourists</i>	<i>Total</i>
2019	84.581	9184	93.765
2020	240.927	23.501	264.428
2021	127.418	12.857	140.275
2022	512.871	15.035	527.906
2023	465.025	26.827	491.852

Source : Ministry of Tourism and Traditional Handicrafts, Algeria

Although the pandemic disrupted this momentum, the sector demonstrated resilience. The 2021/2022 season recorded 527 906 visitors, while the 2022/2023 season attracted 491 852 visitors, including 26 827 foreign tourists (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). The government has made the Sahara Desert, which covers 83% of Algeria's total land area, a centrepiece of its tourism transformation strategy, implementing a visa-on-arrival policy in January 2023 to simplify access for desert tourism enthusiasts.

4.1.3. Tourism's Economic Contribution

Tourism's contribution to Algeria's national economy remains modest compared with international benchmarks and regional peers. The sector's contribution to GDP stood at 1.38 % in 2019, dropped to 0.61 % during the pandemic year 2020, and gradually recovered to around 1.47 % by 2023 (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024; Dahmani, 2025). Other national and international analyses present similar findings, with the OECD (2025) estimating a direct contribution of about 1.8 % in 2019, while (Kak et al. 2025) report a slight improvement to 2.1 % of GDP in 2022, confirming a slow but steady rebound.

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Despite this gradual recovery, the sector's overall weight in the national economy remains far below the 10 % regional average recorded in Mediterranean basin countries (UNWTO, 2024). This substantial gap underscores the persistent underutilization of Algeria's tourism potential and highlights significant room for sectoral growth. The limited economic contribution reflects broader structural challenges, including insufficient infrastructure, limited international marketing, and regulatory constraints that have historically hindered sector development (Hamill-Stewart, 2024. November 15). Addressing these barriers is crucial for Algeria to position tourism as a stronger driver of sustainable economic diversification in the coming decade.

4.1.4. Employment Generation in Tourism

Tourism's role in employment creation has shown fluctuating patterns corresponding to pandemic impacts and recovery phases. The sector employed approximately 308 000 workers in 2018, increasing to 320 000 in 2019 (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). However, pandemic-related closures of hotels and tourist sites reduced employment to 261 000 in 2020. The recovery phase saw gradual improvement, with employment reaching 270 000 by 2022 (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). While these employment figures demonstrate the sector's resilience, they also reveal its current limited capacity for large-scale job creation compared to Algeria's substantial youth unemployment challenges. The government's Tourism Development Master Plan 2030 aims to significantly expand this employment base through increased investment and sectoral expansion initiatives.

4.1.5. Accommodation Infrastructure Development

Algeria's accommodation infrastructure has experienced steady quantitative growth despite various challenges. The number of tourism establishments increased from 1368 facilities in 2018 to 1638 in 2023, while bed capacity expanded from 119 155 to 151 052 over the same period (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). This represents a 19.7% increase in establishments and 26.8% growth in capacity over five years. Building on this progress, the government announced that national accommodation capacity is projected to reach around 160,000 beds by the end of 2025, with an ambitious target of 250,000 beds by 2030 (Algeria Invest, 2025. July 14). According to the Divan Centre (2025), approximately 582 hotel and tourism-facility projects are currently under implementation across various provinces, expected to add 70,000 additional beds by the end of 2025.

Despite these encouraging developments, Algeria's accommodation density remains critically low, estimated at only 0.1 hotel rooms per 100 inhabitants, one of the lowest ratios in the Mediterranean region (World Economic Forum, 2017). This persistent accommodation shortage continues to constrain Algeria's ability to absorb higher tourist inflows, even when demand exists. Addressing these infrastructure and capacity challenges remains a key priority if Algeria is to achieve its 2030 vision of transforming tourism into a major driver of sustainable economic diversification.

❖ Distribution of Accommodation by Tourism Product Type

The geographic and thematic distribution of accommodation capacity reveals significant concentration patterns. Urban tourism products dominate, accounting for 97 221 beds in 2023, followed by coastal tourism with 39 059 beds. Desert tourism facilities, despite the Sahara's prominence in Algeria's tourism narrative, provide only 6 986 beds, while thermal spa facilities offer 5 339 beds (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024).

Table 3. Distribution of accommodation capacity by type of product between 2020 - 2023

	2020		2021		2022		2023	
	Number of hotels	Number of beds	Number of hotels	Number of beds	Number of hotels	Number of beds	Number of hotels	Number of beds
Urban	1070	81.863	1115	85.577	1154	93.906	97.221	
Coastal / Beach	253	32.971	258	33.588	283	37.586	39.059	
Desert	80	4598	83	6620	86	6946	6986	
Thermal	27	1883	27	4598	33	5189	5339	

Source : Ministry of Tourism and Traditional Handicrafts, Algeria

This distribution pattern suggests misalignment between accommodation supply and Algeria's most distinctive tourism assets. While urban facilities serve primarily business and administrative travel, the country's unique competitive advantages lie in its desert landscapes, Mediterranean coastline, and thermal resources. Rebalancing accommodation development toward these distinctive offerings represents a strategic priority for enhancing Algeria's tourism competitiveness.

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Building on this base, the national capacity of hotel beds in Algeria stood at approximately 140 000 beds by the end of 2023, according to official ministry figures. In 2024, with the addition of new hotel infrastructure, capacity rose to around 144 700 beds (an increase of 4 700 beds). Furthermore, with 582 projects underway and expected to deliver 70 000 additional beds by end 2025, the national capacity is projected to exceed 210 000 beds. (DIVAN Centre. 2025)

❖ Accommodation Classification and Quality Standards

The classification profile of Algeria's accommodation sector reveals quality challenges that impact competitiveness in international markets. Among classified establishments in 2023, facilities were distributed as follows: 8 724 beds in five-star properties, 11 705 in four-star facilities, 11 893 in two-star establishments, and 15 060 in one-star properties. Notably, 9 019 beds remained unclassified (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024).

The predominance of lower classification and unclassified facilities raises concerns about service quality standards. International tourists, particularly from high-spending source markets, typically seek higher quality accommodations with internationally recognized standards. The limited inventory of upscale facilities constrains Algeria's ability to attract premium market segments and achieve higher per-visitor expenditure levels essential for maximizing tourism's economic contribution.

4.2. Tourism Investment Projects: Implementation Status

The Ministry of Tourism and Traditional Handicrafts tracks tourism investment projects across multiple implementation stages. As of 2023, Algeria registered 2 235 total tourism projects distributed across four categories: 674 projects under implementation, 455 stalled projects, 1 017 projects not yet commenced, and 89 completed projects (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024).

Table 4. Status of Tourism Projects (2019–2023)

	2019	2020	2021	2022	2023
Projects under implementation	889	804	747	701	674
Projects suspended	239	308	342	427	455
Projects not yet started	1220	1380	1385	1342	1017
Completed projects	107	87	111	92	89
Total	2455	2579	2585	2562	2235

Source : Ministry of Tourism and Traditional Handicrafts, Algeria

These statistics reveal significant implementation challenges. The completion rate remains notably low, with only 3.9% of registered projects reaching completion by end 2023. Meanwhile, the proportion of stalled projects (20.4%) and uncommenced projects (45.5%) indicates substantial obstacles in project execution. Common barriers include financing difficulties, bureaucratic delays in licensing and approvals, land allocation complications, and coordination challenges among multiple government agencies. Despite these challenges, Algeria is implementing 582 tourism projects that are expected to add approximately 70 000 new beds by the end of 2025, suggesting accelerated implementation momentum in recent years (Divan Centre, 2025). Addressing systemic obstacles to project completion represents a priority for achieving the sector's development targets.

4.3. Foreign Investment in Tourism: Partnership Models

Algeria has established international partnerships to attract foreign investment and expertise into its tourism sector. As of recent data, five major international partnerships operate in Algerian tourism, involving investors from the United Arab Emirates, Jordan, Qatar, China, Syria, and Saudi Arabia (Ministry of Tourism and Traditional Handicrafts, Algeria, 2024). Algeria has intensified efforts to attract foreign investment in its tourism sector through a growing number of international partnerships and domestic development projects. According to the Divan Centre (2025), the country is currently implementing 582 tourism projects expected to provide approximately 70 000 new beds by the end of 2025, reflecting a notable acceleration in infrastructure expansion.

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These initiatives are complemented by several bilateral and regional investment partnerships. For instance, in April 2025, Algeria and Saudi Arabia signed a series of cooperation agreements covering key economic sectors, including tourism and hospitality, aimed at encouraging Saudi participation in Algerian tourism ventures (Arab News, 2025). Similarly, Djanane and Hireche (2024) highlight that collaborative projects with Emirati and Saudi partners have emerged in the form of integrated tourism villages and hotel complexes, demonstrating Algeria's strategic intent to leverage foreign capital and expertise to strengthen its tourism infrastructure. Nevertheless, while these developments signal increasing investor interest, the scale of foreign direct investment in Algerian tourism remains relatively modest compared to the country's potential and regional benchmarks.

5. Strategic Vision: Algeria's Tourism Development Master Plan 2030 :

Algeria initiated its comprehensive tourism strategy in 2008 with the Schéma Directeur d'Aménagement Touristique (SDAT), originally targeting 2025 and subsequently extended to 2030, as part of a structural national planning framework (Zermane, Barhoum & Badis, 2021). The SDAT framework emerged under Law N° 01-20 of December 12, 2001 concerning territorial planning and sustainable development, thereby positioning tourism as an integral component of Algeria's national spatial development strategy (Zermane et al., 2021; Djanane & Hireche, 2024). Under the SDAT 2030, the government has committed to transforming tourism from a marginal sector into a strategic economic pillar capable of diversifying the country's hydrocarbon dependent economy. The plan aims to increase annual visitor numbers from about 2.5 million in 2023 to 12 million by 2030 with long-term ambitions targeting 14 million foreign visitors by 2035 (Hamill-Stewart, 2024; Djanane & Hireche, 2024).

5.1. Strategic Objectives of SDAT 2030

The Tourism Development Master Plan pursues five interconnected strategic objectives designed to comprehensively transform Algeria's tourism sector:

- ❖ **Positioning Tourism as an Economic Growth Engine:** The plan seeks to elevate tourism's GDP contribution from its current 1.5% to 10% by 2030, aligning with Mediterranean region averages (Ministry of Land Use Planning, Environment and Tourism, 2008). This

transformation requires substantial private sector investment mobilization, regulatory streamlining, and integrated sectoral planning connecting tourism with complementary

economic activities. (Ministry of Land Use Planning, Environment and Tourism, 2008; AAPI, 2024)

- ❖ **Generating Spill over Effects on Related Sectors:** Tourism development is conceptualized as a catalyst for broader economic activity, stimulating agriculture (through local food supply chains), construction and public works (via infrastructure development), manufacturing (through handicrafts and souvenirs), and various service industries. Algeria's tourism strategy is built on five key dynamics: investment, improvement of services, promotion, development of communication infrastructures, and establishment of a robust legal framework (AAPI, 2024). However, maximizing these spill over effects requires careful attention to investment models and to the degree of local economic integration. Badreddine et al. (2025, a) demonstrated, through their analysis of the Canadian tourism sector, that spill over effects are significantly strengthened when sectoral development follows the principles of the social and solidarity economy (SSE). Their study revealed that Canada's SSE based tourism sector accounting for 15% of national employment illustrates how collective enterprises can effectively anchor tourism development within local economies. This approach ensures that job creation and economic benefits remain within host communities rather than leaking to external actors.
- ❖ **Reconciling Tourism Development with Environmental Sustainability:** SDAT 2030 integrates sustainable development principles, emphasizing environmental protection, heritage conservation, and community benefit distribution. This approach recognizes that Algeria's tourism competitiveness depends fundamentally on preserving the natural and cultural assets that constitute its primary tourism attractions. (Ministry of Land Use Planning, Environment and Tourism, 2008). Badreddine et al. (2025, b) demonstrate through their UAE case study that environmental sustainability in tourism requires operationalizing responsible practices across four interconnected pillars: economic viability, social equity, cultural preservation, and environmental protection. Their analysis of the UAE's experience reveals that achieving this balance demands coordinated policy frameworks, stakeholder education, and monitoring mechanisms elements that should inform Algeria's SDAT 2030 implementation.
- ❖ **Valorising Historical, Cultural, and Spiritual Heritage:** The strategy emphasizes heritage tourism development, recognizing Algeria's diverse cultural patrimony spanning prehistoric

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rock art, Roman archaeological sites, Islamic architectural heritage, Ottoman period structures, and colonial-era buildings. Effective heritage valorisation requires improved site

management, interpretive services, and integration into coherent tourism circuits. (Ministry of Land Use Planning, Environment and Tourism, 2008).

- ❖ **Enhancing Algeria's International Tourism Image:** Algeria suffers from negative international perceptions and visibility gaps that discourage potential visitors despite the country's substantial tourism resources (AAPI, 2024). The plan prioritizes systematic destination branding, international promotional campaigns, and diplomatic engagement to reshape Algeria's tourism image internationally.

5.2. Implementation Mechanisms: Five Strategic Dynamics

The SDAT 2030 operationalizes its objectives through five interconnected implementation mechanisms: (AAPI. nd)

- ❖ **Tourism Destination Promotion Strategy:** This mechanism focuses on developing and projecting a coherent Algeria tourism brand emphasizing authenticity, innovation, and quality. Implementation involves participation in international tourism fairs, digital marketing campaigns, partnership development with tour operators, and media familiarization programs.
- ❖ **Quality Enhancement and Service Improvement Program:** Recognizing that service quality fundamentally determines visitor satisfaction and repeat visitation, this program emphasizes hospitality training, service standardization, quality certification systems, and continuous professional development for tourism personnel.
- ❖ **Tourism Pole Development and Investment Promotion:** The government has designated 249 zones for tourism expansion across different regions, offering diverse experiences from coastal to mountain and thermal tourism. These Tourism Expansion Zones (ZET) benefit from streamlined regulatory procedures, infrastructure prioritization, and targeted investment incentives designed to concentrate development resources effectively.
- ❖ **Public-Private Partnership Framework:** Recognizing that government resources alone cannot achieve the sector's development targets, SDAT 2030 establishes structured mechanisms for public-private collaboration. The public sector focuses on enabling infrastructure (roads, airports, utilities), regulatory frameworks, and heritage site

management, while private operators develop and manage commercial tourism facilities and services.

- ❖ **Tourism Financing Facilitation Mechanism:** The strategy addresses tourism sector financing challenges through dedicated financial instruments, preferential lending terms, risk guarantee mechanisms, and coordination with financial institutions to ensure capital availability for viable tourism projects.

5.3. Regional Tourism Poles of Excellence

SDAT 2030 organizes Algeria's territory into seven Tourism Poles of Excellence, each designed to leverage distinctive regional assets in line with the country's long-term diversification strategy :

- ❖ **North-Central Pole (Algiers, Tipaza, Boumerdes, Blida, Chlef, Ain Defla, Bouira, Bejaia, Tizi Ouzou):** Covering 33 877 km² with 651 km of coastline and 225 beaches, this pole serves as Algeria's primary gateway with international airport connectivity and concentration of business tourism demand. Development emphasis includes urban tourism infrastructure, conference facilities, and integrated coastal resort developments with programmed capacity additions of 9 595 beds (Dahmani, 2025).
- ❖ **Northeast Pole (Annaba, El Tarf, Skikda, Guelma, Tebessa, Souk Ahras):** Extending across 80 347 km² with over 310 km of coastline, this pole encompasses 170 beaches, 874 000 hectares of forests, and more than 30 natural springs. Development priorities include coastal resort complexes, eco-tourism initiatives, and thermal spa facilities. (Direction of Tourism and Handicrafts Boumerdes, 2024)
- ❖ **Northwest Pole (Mostaganem, Oran, Ain Temouchent, Tlemcen, Mascara, Sidi Bel Abbes, Relizane):** Spanning approximately 35 000 km² with 400 km of coastline, 125 beaches, and significant forest and thermal spring resources, this pole is positioned to become a premier destination. Development programs target 10 146 additional beds alongside infrastructure modernization emphasizing accessibility and service quality. (Berghout & Guerziz, 2024)
- ❖ **Southeastern Oasis Pole (Ghardaia, Biskra, El Oued, El Meniaa):** Extending across 160 000 km², this pole emphasizes Saharan oasis tourism, offering distinctive desert landscapes and UNESCO World Heritage M'Zab Valley. Development includes airport infrastructure

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enhancement at Biskra and Ghardaia, trans-Saharan highway access improvement, and 26 new hotels providing 2 092 beds. (Dahmani, 2025)

- ❖ **Southwestern Pole (Touat, El Golea, Ksar Routes: Adrar, Timimoun, Bechar):** Covering 603 000 km², this pole features rich natural and cultural landscapes including the historic ksar (fortified village) route. Development integrates UNESCO program support for Sahara of Cultures and Peoples, emphasizing sustainable desert tourism with 912 beds in upscale facilities including the Ksar Massin village in Timimoun.
- ❖ **Great South Tassili Pole (Illizi):** Encompassing 284 618 km², this pole centres on Tassili n'Ajjer National Park, a UNESCO World Heritage Site featuring unique geological formations and over 15 000 prehistoric rock paintings and carvings. The park's prehistoric art dates back as far as 10,000 BCE, creating surreal vistas that attract photographers and nature enthusiasts. Development remains limited to preserve cultural and natural integrity, with one luxury facility providing 150 beds planned.
- ❖ **Great South Hoggar Pole (Tamanrasset):** Spanning 654 200 km² and featuring UNESCO-listed heritage, this pole emphasizes high-altitude desert tourism with distinctive volcanic landscapes. Development plans include four hotels providing 225 beds, prioritizing low-density, high-value tourism aligned with environmental carrying capacity.

5.4. Challenges and Implementation Constraints

Despite ambitious objectives and comprehensive planning, Schéma Directeur d'Aménagement Touristique 2030 (SDAT 2030) implementation encounters significant obstacles . The plan has not achieved expected results due to several socio-political issues and external factors including political instability and the global COVID-19 pandemic (Ben Sadira, 2022; Belahcene & Brahim, 2025).

Additional constraints include institutional coordination deficits, since tourism development requires coordination among multiple ministries, regional authorities and local governments, but inadequate coordination has resulted in delays and conflicting priorities (Belahcene & Brahim , 2025). Financial resource limitations continue to hinder progress: the scale of investment required to achieve SDAT 2030 targets substantially exceeds currently committed resources, and mechanisms to mobilise private capital remain underdeveloped (Ayoub Sakri et al., 2023). Human capital constraints are also evident, with the tourism sector suffering from shortages of trained personnel, limited hospitality education infrastructure and difficulties retaining skilled workers (Dahmani, 2025). Infrastructure investment gaps persist, including regional transport networks,

airport capacity beyond major urban areas and utilities in development zones (Sustainable Tourism Development in Algeria, 2024).

Finally, marketing and visibility deficits constitute a significant obstacle: Algeria's international tourism marketing efforts are modest compared to regional competitors, characterized by a limited digital presence, constrained participation in international promotion channels and inadequate collaboration with tour-operators (Hassani & Azaz, 2021).

6. Conclusion :

This study reveals a significant disconnect between Algeria's tourism potential and its actual performance, despite a comprehensive legislative framework and ambitious strategic planning under SDAT 2030. While the 2022 Investment Law introduced important reforms and the government has set bold targets to welcome 12 million tourists by 2030, fundamental barriers continue to impede progress. Tourism's modest contribution of 1.47% to GDP, critically low accommodation density, and the troubling reality that 66% of registered tourism projects remain stalled or uncompleted underscore the gap between policy ambition and operational execution.

Algeria's comparative advantages in desert, coastal, and heritage tourism remain largely untapped due to three interconnected challenges: infrastructure deficits that constrain visitor absorption capacity, institutional fragmentation that delays project implementation, and insufficient international visibility that limits demand generation. The World Economic Forum's ranking of Algeria at 98th position among 119 economies confirms that structural weaknesses overshadow the country's natural and cultural assets.

To bridge this performance gap and realize tourism's potential as an engine of economic diversification, several strategic interventions warrant priority consideration. First, accelerating infrastructure development through enhanced public-private partnerships could address accommodation shortages and connectivity constraints, particularly in high-potential zones such as the Sahara desert and north-eastern coastal regions. The government should consider establishing fast-track approval mechanisms and risk-sharing instruments to unlock private capital for tourism infrastructure. Second, strengthening institutional coordination through a dedicated inter-ministerial committee with clear mandates and accountability frameworks could reduce bureaucratic obstacles that currently delay project implementation. Digitalizing administrative procedures, as initiated through the Algerian Investment Promotion Agency platform, should be expanded to cover all tourism related licensing, permitting, and compliance requirements. Third, implementing an

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aggressive international marketing campaign leveraging digital channels and strategic partnerships with major tour operators could address Algeria's visibility deficit. Learning from successful destination marketing strategies in Morocco and Tunisia, Algeria should invest in professional destination branding, targeted promotional campaigns in high-value source markets, and incentive programs for international airlines to increase connectivity. Fourth, prioritizing human capital development through expanded hospitality education programs, international training partnerships, and professional certification systems would address service quality concerns that undermine visitor satisfaction and repeat visitation. Collaboration with established international hotel schools and tourism training institutes could accelerate workforce development. Finally, establishing robust monitoring and evaluation mechanisms to track SDAT 2030 implementation progress, identify bottlenecks in real-time, and enable adaptive management responses would enhance strategic execution effectiveness. Regular performance audits, stakeholder consultations, and transparent reporting could strengthen accountability and facilitate evidence-based policy adjustments.

The path to transforming Algeria's tourism sector into a meaningful contributor to economic diversification is neither simple nor assured. However, the foundation established through recent legislative reforms, the strategic vision articulated in SDAT 2030, and growing international interest provide genuine opportunities for progress. Success will require sustained political commitment, effective inter-institutional coordination, substantial financial investment, and pragmatic problem-solving to overcome implementation obstacles. If Algeria can translate its considerable tourism potential into operational reality, the sector could indeed become a viable pillar of post-hydrocarbon economic development, generating employment, foreign exchange earnings, and regional development benefits essential for the country's long-term prosperity.

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