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## TOURISM SECTOR IN LIBYA – A SITUATION ANALYSIS

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### Abstract

Libya started its recovery after the conflict called Arab Spring in 2011 and the improvement process may be seen in GDP growth, stabilization of the industry, in the areas of public expenditure and financial management, infrastructure repair, job creation for young people and service delivery and in social processes. Although the country's economy is mostly based on oil and natural gas extraction, other sectors also should be developed to build more pillars for the economy. The aim of the paper is to provide a strategic environmental analysis from the aspects of tourism and hospitality sector, by which the opportunities for improving the role of tourism sector in Libya are outlined. The first step of this development is to create a safer environment that is necessary for the development of different branches of tourism and hospitality sector, the second step is to make efforts for increasing the quality of services. Based on a document analysis and own experiences the authors formulated recommendations that may serve the quality improvement efforts.

**Key words:** *tourism industry, environment analysis, Libya, job creation, SMEs*

**JEL Classification:** Z32, M21, E20

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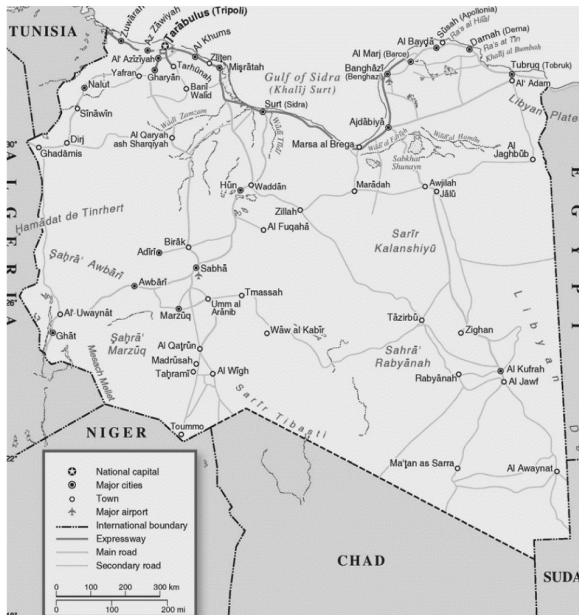
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### Introduction

Libya is a country in the so-called Maghreb region of North Africa bordered by the Mediterranean Sea to the North, Egypt to the East, Sudan to the Southeast, Chad and Niger to the South, Algeria and Tunisia to the West (Figure 1.). The three main parts of the country are Tripolitania, Fezzan and Cyrenaica. With an area of almost

1.8 million square kilometres, Libya's territory is 1.8 million km<sup>2</sup>, this is the 4th largest country in Africa and the 17th largest country in the world. The population is 6.375 million. Libya is among the largest proven oil reserves of any country in the world (Alammari et al., 2017).

Figure 1 Map of Libya



Source: <http://ontheworldmap.com/libya/libya-road-map.html>

Libya is categorized as an upper-middle-income country by the United Nations (UN, 2018). The economy is dominated by oil and gas industries. In 2010, total oil production (crude plus liquids) was approximately 1.8 million barrels/day (IMF, 2010). The revenue from oils and natural gas production represents the main financial resources for the expenditure on infrastructure, education, and job creation. A main official goal of restructuring the Libyan economy is to increase the role of the private economic sector in the economy (Alammari et al. 2017).

Economic changes in Libya may bring results to achieve sustainable investment in the non-petroleum industry sector, mainly into manufacturing industry and agriculture. The main economic development aim of Libya is to reach greater variation in capital, products, and imports, the non-oil sector and raw material, it is likely that the economy will be self-sustainable and will grow at high speed, like other emerging economies (Bala et al., 2017). Nevertheless, Libya achieved real steps towards the economic growth in recent year but this growth is mostly based on oil revenues, which contribute to mostly of GDP growth in Libya and represent 97% of total GDP (Otman and Karlberg, 2007). In developing of structure and in reframing

of the Libyan economy, the economic and political policy on various environmental and social factors has moved forward.

Libya is now entering a new stage of its development. In the past, the country was significantly isolated from the outside world, the focus was put on living conditions and social standards, oil revenues were the main source of national prosperity, and government focused on the distribution of oil revenues to address social needs.

Today, the emerging future of Libya may be described by:

- Increasing integration with the outside world,
- Greater opportunities for individual achievement and involvement in the productive sector,
- Oil revenues supplemented by wealth created in other parts of the economy,
- Government increasingly working with the private sector to enable the creation of wealth in competitive markets (Alammari et al. 2018).

The aim of this paper is to give a summary on the present circumstances of the Libyan economy, focusing on the opportunity for development in the tourism sector. Based on a wide macro-environmental analysis suggestions are formulated for future measures in order to stimulate tourism activities and related industries.

## Material and Methods

The paper provides a wide environment analysis of Libya, using desk research as a method, based on literature sources including IMF, OECD, UN and World Bank official reports, documents and databases of the Libyan Central Bank, international statistical websites and authors' working experiences. The literature review was conducted by searches with key words related to Libya, Libyan tourism sector, MENA countries, environment analysis, small and medium sized enterprises, etc. As a second step, besides the document analyses, calculations were made using secondary data in order to explore the macro-environmental factors of Libya which influence the country's economy and the tourism sector in particular. The environment analysis resulted a STEEP analysis, by which tool the conclusions and recommendations were outlined.

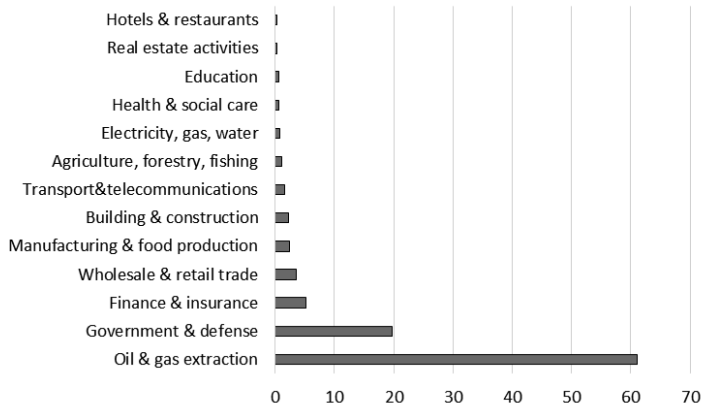
It should be highlighted that relevant and official governmental statistical data are rarely available after the political changes, so most of the newest available data are for 2012.

## Results and Debate

### Economy of Libya

The main source of GDP is oil and gas extraction, the other sectors represent a much lower share in the national economy. This makes the country as a one-pillared economy (Figure 2).

Figure 2 Sectoral contribution to GDP in Libya in 2011 (%)

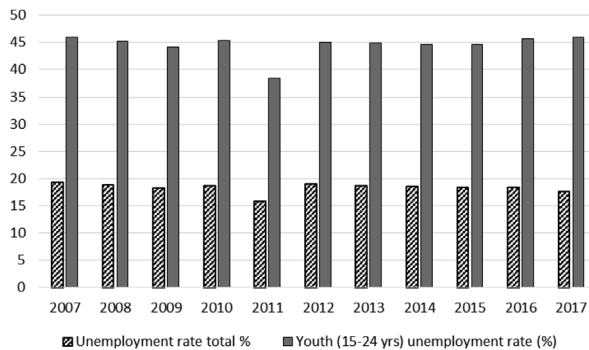


Source: own calculations based on Central Bank of Libya data

The numbers verify that the country's economy is one pillared (oil and gas extraction), and due to the fragile political circumstances a high focus is put on defence and governmental issues. Due to the lack of data gathering, there are no reliable and official Libyan statistical data after 2011 about the country's performance according to the different sectors.

The unemployment rate is around 15-18%, it is fluctuated substantially in recent years, but it tended to decrease in the period between 1999-2018, the unemployment rate was at 15.7% in 2018 (Knoema Atlas, s.d.). On the other hand, unemployment rate is very high in the young age groups, it reaches almost 50% (Fig. 3), which generates many social problems for the young generation, and may lead to serious economic problems in the future.

Figure 3: Unemployment rate in Libya (%) in the period between 2007 and 2017



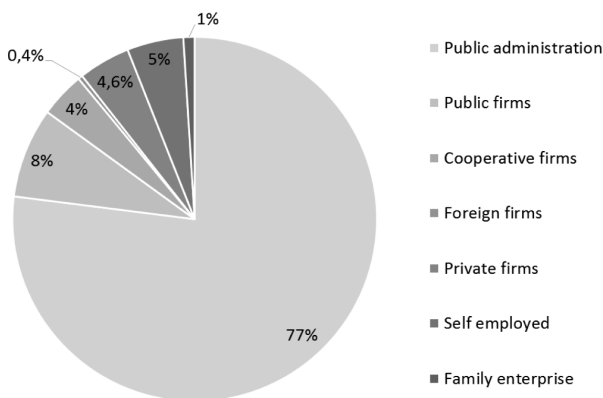
Source: own calculations based on [www.statista.com](http://www.statista.com)

The vast majority (85 percent) of Libya’s active labour force is employed in the public sector, a high rate even by regional standards. The rate for women is even higher (93%). Prior to the uprising, in a population of 6 million, Libya’s labour force comprised 2.6 million workers, nearly 50 percent of who were foreign. During the political crisis, an estimated 1 million foreign workers fled Libya (World Bank Group, 2015).

Compared to other middle-income countries, and the countries of the region, the employment in industry and agriculture is considerably lower in Libya, these two sectors account for only 9% and 1% of the labour force, respectively. There is a huge decline in the employment in industry, in 1986 30% of employed worked in industry, in 2012, only 9%, while these numbers for agriculture are 20% in 1986, and only 1% in 2012. The active labour force has grown in services, now it reaches 70%, the sectors of these services are various.

The vast majority (85%) of the employed population works in the public sector (public administration and public firms) which is higher than the regional standards. The proportion of foreign companies is very low, which is reasoned by the national laws. Self-employment and private firms represent almost the same number (4-5%), self employment is rather low, as most of the Libyan citizens are not planning to think in entrepreneurship. These figures are generated by the special, one-pillared structure of the Libyan economy, where state-owned enterprises are dominating (Figure 4). Nevertheless, the situation is similar in other oil-based countries like Iran (Nosratabadi and Illés, 2018).

Figure 4 Libya’s labour force by occupation and business types (%)



Source: own calculations based on World Bank Group data (2013)

### SMEs in Libya

Small and medium sized enterprises, as well as micro enterprises represent the accelerating power to economy through human, financial and technological resources which they control and use, so the issues of keeping and supporting of SMEs have become the priority of governments and policies makers.

In Libya, the political events still affect the economic performance, creating a changing and unclear situation for the whole national economy, the impact between economy and policy are very complicated. Since February 2011, the country has entered internal conflicts with external interventions that destroyed decades of development and economic prosperity. The infrastructure has been destroyed and thousands of people have left abroad, and the country has lost most of its non-oil or oil revenues (Alammari et al., 2016). SMEs in different economic sectors suffer from political instability for long time.

In the Arabic world, the countries adopted different criteria regarding the number of employees as well as the requirements of capital to define the SMEs, which differ from the European Union's definition (Table 1.)

*Table 1 Definition of SMEs in some Arabic countries*

Country	Enterprise type according to number of employees		
	Micro	Small	Medium
<b>Egypt</b>	1 to 4	5 to 14	15 to 49
<b>Lebanon</b>	1 to 9	10 to 49	50 to 99
<b>Oman</b>	1 to 5	6 to 20	21 to 100
<b>Jordan</b>	1 to 4	5 to 19	20 to 99
<b>UAE</b>	1 to 9	10 to 49	50 to 499
<b>Tunisia</b>	1 to 5	6 to 49	50 to 99
<b>Libya</b>	less than 5 or 10	less than 25	25 to 50

*Source: own summary based on Jordan Human Development Report (2011), EIB (2015) and OECD (2016)*

In general, until today, there is no SME legislation in Libya, there is strong intention to develop an SME Law, where the main characteristics of micro, small and medium enterprises will be defined. Of course, SMEs significantly contribute to job opportunities and growth, but in Libya, SMEs contribute to GDP only by 5%. Anyway, there is no official information available regarding the contribution to employment, but the estimations of international organizations shows that SMEs account for 11% of total employment in Libya. Comparing to other countries, this consider as a sign of slowly growth of SMEs sector in Libya. In the same time there is no official numbers of number or size of SMEs, but the estimations of 2006 refers to 117 828 enterprises, the average workers per enterprise is 2.5. The main statistics of Libya in different sectors are summarized by Table 2.

Table 2 Statistics of SMEs by sector

Business Census 2006	Hotels		Trade and Commerce		Services		Manu- facturing	
	number	%	number	%	number	%	number	%
Number of enterprises	241	0.2	83 298	70.7	17 539	14.9	16 750	14.2
Number of workers	8 630	2.9	177 641	61.5	61 022	21.1	42 017	14.5
of which, non-Libyan	-	-	36 986	45.5	12 118	15.0	32 044	39.5
Average workers per enterprise	34.7		2.1		3.5		2.5	

Source: own calculations based on OECD (2016)

The lack of accommodation opportunities and the poor performance of tourism and hospitality sector are indicated by these numbers, which refers to the need for improving the infrastructure of tourism sector by micro-small and medium enterprises which is the second main step in the development of the Libyan tourism sector after the creation and stabilization of political safety.

### Economic impacts of political instability

The Arab region witnessed a serious political turn in the region movements in the late 2010, known as the Arab spring revolutions. This instable situation is still affect the economies, the societies and the international relations of these countries (Massad, 2012). After the success of the revolution in Egypt, events broke out in Libya on February 17, 2011 and lasted until the end of the old regime ruling for 4 decades. The revolution continued to develop into a kind of civil war between the various factions, which established several states within the state, in addition to the control of terrorist groups, large areas of Libyan territory are in the focus of international debate so far (Elkrghli, 2016). This situation led to that Libya is considered among the worst countries regarding the political instability index: Turkey has the 184th place, Libya is 187th, Iraq is 188th, and at places from 189th and Somalia, Sudan, Pakistan, Afghanistan, Yemen can be found, the last in the row, as 194th there is Syria (UN, 2018).

There is a strong relationship between the political stability and the level of economic performance (IMF, 2010):

- Unemployment is one of the most serious problems that threaten the stability of countries because it is the main cause of many social and political manifestations. Unemployed young people can tend to practice many unethical manifestations such as crimes and violence.
- Inflation has been and remains one of the most important challenges facing political and economic decision makers, as it is directly related to the level of prices and the ability of people to meet their needs, which in turn is one of the main causes of violence and thus political instability.

- Financial and administrative corruption is one of the most important reasons that lead to political instability as well as the disruption of development. It is noted that financial and administrative corruption have facilitated the financing of terrorist operations according to the relationship between terrorist organizations and sources of corruption, a society with fewer administrative and financial corruption tends to be more politically stable.
- Political instability leads to fear of foreign investors and thus their reluctance to enter the politically unstable country, as well as withdrawing their investments to safer countries, giving larger numbers of outflows.
- Libya, as a country rich in oil production and reserves, experienced a good economic level compared to neighbouring countries before the outbreak of political events in 2011. After the revolution, the main indicators changed, due to the fragile political situation and instability (Table 3).

*Table 3 Some main economic indicators for the period 2010-2017*

Year	Population	GDP per Capita \$	Inflation Rate %	GDP Growth %
2010	6 169 140	12 440	14%	5%
2011	6 193 501	4 730	18%	- 62%
2012	6 198 258	11 710	9%	123%
2013	6 195 970	10 960	7%	-13%
2014	6 204 108	7 800	17%	-24%
2015	6 234 955	5 970	15%	-9%
2016	6 293 253	5 110	14%	-3%
2017	6 374 616	6 540	24%	27%

*Source: own summary based on World Bank Microdata Library (Libya)*

### **Tourism sector in Libya**

Although Libya has outstanding values in tourism attractions, but due to the present political instability and the previous and present weak the governmental interest in the tourism-marketing sector it is evaluated as a weak point of the country according to global indicators (Naama et al., 2008; Lafferty and Yousef, 2015; Elkrggli, 2016; Alammari et al., 2017; Said, 2017).

Libya has an extremely large land area, has a special natural environment with mountain areas, deserts and the longest seaside in the Mediterranean. Libyan people are friendly and they keep their traditions, culture, music and cuisine. The overall features of Libya would allow competing in the stage of international tourism (Masoud, 2013).

The most significant tourism constituents of Libya are the following:

- excellent natural resources (site, weather, climate, geographic nature, surface, waters, vegetal life, animal life, development and other natural resources);
- good weather and climate (temperatures, wind, humidity, rains, plants and forests);
- outstanding geographic features (mountains, rivers, sea, valleys, rocks and deserts, desert lakes, 2000 km long seaside area) (Said, 2017).

- Nevertheless, Libya is not among the widely chosen touristic destinations. The main reasons of the unfavourable situation are the absence of high quality services (Elkrghli and Elgimati, 2013):
- the lack of airlines services,
- the shortage of excellent hotels,
- the decrease in the quality of services at local hotels,
- the lack of tourism programmes and recreational services,
- the lack of reliable public transport services,
- the poor communication system,
- the absence of appropriate financial services and the barriers of language.

Libya could be one of the most favourable tourism country in the world if the tourism industry would be better respected by the state. The tourism industry could be a good potential for economic diversification and could be a second pillar besides the oil and gas revenues. An environmental report (Khalifa, 2010) highlighted this risk, as Libya is ranked among the most hydrocarbon-dependent countries, and according to recent estimations, the oil depletion is nearer to 20 years.

Libya's tourism ministry representatives stated that there is a strong intention to open Libya to the world, as Libya's tourism potential is excellent. When compared with other Northern African countries, one can see the huge differences. Morocco and Tunisia receive 6 million tourists each year, and Egypt more than 10 million, while Libya receives only a few hundred thousand visitors in the recent years (Goodland, 2013).

Naama et al. (2008) highlighted that human resource training and education is an important task which must be strengthened in the private sector, to match customers' (i.e. the guests') and industry needs, and to open cultural and religious dimensions which could improve the poor industry image. A special feature of Arabic countries was mentioned by Jafari and Scott (2014), namely halal tourism, and religious tourism, which should also be considered in the strategy formulation process. Shakeela et al. (2012) focused on sustainability of the tourism sector, which could raise the respect and prestige of tourism and hospitality sector, but as it was underlined, sustainable tourism needs more and better-educated human workforce.

An important problem of Libya's tourism and hospitality sector is the lack of appropriate accommodation facilities for foreign tourists. As Lafferty and Youssef (2015) mentioned the need for accommodation opportunities and the improvement of human resources in hotel sector is a critical point. According to Alnawas and Hemsley-Brown (2019) hotel performance is assessed indirectly, via customer relationship capability, branding capability and service innovation capability. Chen and Myagmarsuren (2012) stated that market orientation (i.e., customer and competitor orientations) as a business strategy has just recently been adopted in the travel and tourism industry by which performance and value offerings may be stimulated. The future tourism and hospitality sector strategy should focus on these issues as well.

### Situation analysis by macro-environmental factors

The main goal of the authors was to show the importance of changing the one-pillar based economy (focusing on oil extraction), and to shift towards building other pillars in other sectors. The main problems are related to the unstable political system, the absence of well-built system of tourism-related infrastructure, the lack of SMEs and the low quality of services. For quality improvements, a conscious situation analysis is needed, to make plans, to check feasibility of the plans, and after preparations to implement and control the realization process. This is a main task of policy developers and responsible persons at government and company managers. The process shall follow the quality assurance methods, with a special focus on controlling (Illés and Szuda, 2015; Xu et al., 2018).

Based on the literature sources, situation analysis and the experiences of authors, the most important quality improvements to solve the tourism-related problems of Libya are the following:

#### *Lack of tourism-related infrastructure*

- lack of accommodation in terms of both quantity and quality for international tourists close to the principal attractions (classical archaeological sites, coastal areas, desert sights),
- lack of road signs posting at places of interest in foreign language,
- inadequate road maps of Libya,
- inadequate maps for the principal towns and cities,
- lack of information centres at the site areas,
- despite the large number of restaurants, there are only a few that are of an acceptable standard to international tourists,
- lack of adequate entertainment or cultural activities organized for presentation to visitors,
- poor range of Libyan souvenirs and handicrafts.

#### *Lack of awareness and image*

- promotional tools are poor,
- negative image of the country as a tourist destination.

#### *Lack of competent human resources*

- lack of good quality personnel.

To get a complex view about the tourism sector, the STEEP analysis was chosen by the researchers, which describes and analyses the social, technological, economic, environmental and political factors, which influence the country's development and particularly the tourism sector itself (Table 4). This analysis of the macro-environment formulates a good basis for starting to generate recommendations and strategic plans for the future.

Table 4 STEEP analysis of Libya

S	+	<ul style="list-style-type: none"> <li>• living traditions</li> <li>• diversity in culture</li> </ul>
	-	<ul style="list-style-type: none"> <li>• social insecurity civil war, social differences, lack of entrepreneurial attitude, unemployment of young people</li> </ul>
T	+	<ul style="list-style-type: none"> <li>• well-built infrastructure and transport facilities before the Arab spring</li> </ul>
	-	<ul style="list-style-type: none"> <li>• infrastructure problems due to civil war and terrorist attacks</li> <li>• lack of information exchange</li> <li>• poor business information</li> <li>• lack of R&amp;D</li> </ul>
E	+	<ul style="list-style-type: none"> <li>• wealth in oil and non-oil mineral resources</li> <li>• wealth of archaeological resources</li> <li>• wealth in natural resources</li> <li>• growing GDP</li> </ul>
	-	<ul style="list-style-type: none"> <li>• economic crisis</li> <li>• high unemployment rate</li> <li>• one-pillar economy (high dependency on oil and gas sector)</li> <li>• lack of small and medium sized enterprises</li> </ul>
E	+	<ul style="list-style-type: none"> <li>• good natural environmental features</li> <li>• long seaside</li> <li>• touristic attractions</li> <li>• good climate</li> <li>• special attractions (desert, oases)</li> </ul>
	-	<ul style="list-style-type: none"> <li>• impacts of civil war</li> </ul>
P	-	<ul style="list-style-type: none"> <li>• political instability</li> <li>• regional conflicts</li> <li>• civil war</li> <li>• refugee crisis</li> <li>• terrorist attacks</li> </ul>

Source: own summary

The most critical problems are related to the politics-generated safety problems and instability, which have impacts on the social and technology factors as well. International tourism is a huge problem for countries without peaceful circumstances, but when conditions are safe, tourism may contribute to world peace and globalization (Becken and Carmignani 2016).

## Conclusion

Libya has a huge potential for tourism and hospitality sector as the location of the country is excellent, it can attract many tourists, but the image of the country must be changed. A re-established security could raise growing interest for Libya as a tourist destination.

Although the country has a well-educated workforce, but they do not work in private sectors, or they establish enterprises in other countries. Some policy changes are needed to support them, as Libyans are interested to start business; the entrepreneurial dynamism is high among Libyan people. The political and social security is the most important issue. Supposing the peaceful status of the country two elements should particularly be considered, i.e. securing the borders of the country and balancing between local values and demands of tourists.

Quality improvements in tourism marketing are needed, as it is an important component of income for several sectors, not only tourism sector (such as manufacturing, other services, private transportation, food production etc.). Therefore, there is an urgent need to develop human resources, particularly indigenous personnel, for delivering quality services for tourists, as well as enhancing general skills of the local workforce, the skills and knowledge that education and training shall bring through special trainings and courses for new entrepreneurs.

Activating the legal and technical framework for SMEs support programs will make this sector more flexible and can make of this sector as a tool for economic growth in the reconstruction phase in Libya by expanding tax exemptions and facilitating legal procedures.

Focusing on human resources through training and qualifying employees through state training centres and institutes at reduced or free prices, or to find and help investors to choose projects that are in accordance with the industrial reality and the conditions of economic feasibility.

From marketing point of view, supporting these industries is necessary, by opening up new markets for industrial products, considering that advertising and promotion is one of the means of marketing, it is necessary to reduce their cost to the SMEs owners. The establishment of international exhibitions for the products of small and medium projects in order to identify the needs of local and international markets is also suggested.

Financially, the creation of financing products suitable for small enterprises or adopting programs for financing and lending to SMEs on terms of easy payment by banks in a manner that leads to access to the best productivity and quality.

To take advantage of international experiences in restructuring the economy by focusing on supporting small and medium-sized enterprises in the post-conflict phase is also a helpful tool of quality improvements.

To activate international promotion programs for opportunities in Libya to restore growth and reconstruction of the country may contribute to increased foreign inflows and access to specialized financing institutions.

And last but not least, the Libyan problem is mostly a political and security problem, which should be put into the first place. No economic actions can be done without providing the necessary political ground, which requires cooperation between the various local and foreign parties to end the current conflict.

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