



THE SOCIAL AND ECONOMIC IMPACT OF CULTURE: THE FES FESTIVAL FOR WORLD SACRED MUSIC

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LIST OF ACRONYMS

B&B	Bed & Breakfast
RCT	Regional Centre of Tourism
ST	Short Term
EU	European Union
AFESD	Arab Fund for Economic and Social Development
FFMSM	Fes Festival of the World Sacred Music (Festival de Fès des Musique Sacrées du Monde)
LT	Long Term
MAD	Dirham, which is Morocco's currency according to ISO4217 which specifies the list of codes for currencies
MT	Medium Term
MTVlggy	Name of a TV channel
NOOA	National Offices of Airports in Morocco
NRO	National Railways Office
NMTO	National Morocco Transport Office
DC	Developing Country
RTDP	Regional Tourism Development Plan
GPHC	General Population and Housing Census
TOR	Terms of References
UNESCO	United Nations Educational, Scientific and Cultural Organization

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¹ The translation of this Festival is the Fes Festival for World Sacred Music, which will be referred to throughout the study by its French acronym FFMSM.

² Maslow's definition of the range of needs has strongly contributed to the promotion of this perception of culture as belonging to the upper layers of individual needs.

³ <http://www.institut-numerique.org> Institut numérique, 2013

1.1 OBJECTIVES

The terms of Reference for this study define three objectives to be achieved through an examination of the Fes Festival for World Sacred Music (FFMSM)¹:

- Present a synthetic and convincing argument for culture as a vector for socio-economic development, which will reflect, at the same time, the complexity of the subject of this study, and which can be used as a tool for advocating the cause of culture.
- Produce an analytical canvass of the festival using reference tools of UNESCO and the EU and the work of economists who are experts in culture. If the premise of the argument is that both the social and economic dimensions of culture are valid, the analytical tools and the case studies that illustrate this argument are scarce, especially in developing countries.
- Illustrate this canvass through assembling all available information on the FFMSM, which has a record to allow for measuring its impact.

BOX 1: TOR'S OF THE STUDY

- Include a methodology for analysing the economic and social impacts of the cultural events, drawing on the criteria and indicators developed by UNESCO's publications on this topic, and more specifically the publication "Measuring the economic contribution of cultural industries" – a review and assessment of current methodological approaches, and those developed by Crea.re' and published in Measuring Economic impact of CCI policies.
- Illustrate this methodology through the FFMSM model using existing data and collecting new data when necessary.
- Elaborate the study in a way that it can be useful as an advocacy tool for promoting culture as a vector for economic and social development

1.2 THE INTERNATIONAL AND NATIONAL CONTEXT

1.2.1 The international context

Culture is increasingly addressed through the double dimension of its economic and social impact. Two important conventions of UNESCO, the one on intangible heritage in 2003 and the one on the protection and promotion of cultural diversity and cultural expressions, in 2005, have contributed to shed more light on how culture can contribute to sustainable development. These conventions are important references for developing a methodology for studying the culture sector.

From the 2005 Convention, this study essentially retains the double nature of cultural

products and services because culture is constantly caught between two threats: the one that limits it to its social dimension (at the risk of approaching it as a "luxury" for the consumption of those who rank high on the socio-economic strata)² or, on the contrary, the one that perceives it only as a support to promote commercial profit. The argument around the festival presents a good illustration of this undulation between these two threats. Festivals all over the world are witnessing an exponential growth that drives researchers to refer to this growth as an industry or festival fever³. Morocco has also succumbed to this fever.

⁴ Ait Mous, F and Wazif, M., "Festivals d'ete au Maroc: rayonnement international et facteur de cohesion sociale," MED 2008, bilan, Universte Hassan II, Casablanca.

⁵ Ministry of Culture of the Kingdom of Morocco, "Guide des Festivals Art et Patrimoine," 2014.

⁶ Results of the general census of the population for 2014 were not available when the research was conducted.

⁷ 957 507 inhabitants in Fes Province according to the GPHC of 2004.

1.2.2 The national and local context

Morocco is witnessing a proliferation of festivals, which, however, have not been entirely surveyed – about 80 in 2007⁴, 22 of which were organised by the Ministry of Culture in 2014⁵.

The public authorities encourage this type of events because of what they can contribute in the development of cultural tourism and to the image of the country as an open and festive one. Participation in these festivals is entirely or partially free and they attract a large public audience.

But this development was not accompanied by a reflection and analysis of the ex ante or ex post impact measure.

The FFMSM was developed within the perspective of contributing to the development of the city of Fes through the promotion of the heritage and spiritual value of its old city – the medina. Its success can however be explained from the vantage of its own assets and the environment within which it is produced.

According to the 2004 census⁶, Fes has about one million inhabitants⁷ but its cultural infrastructure is poorly developed. There are real gaps between the reality of its infrastructure, the poverty of its cultural and artistic offer, and the official discourse, which showcases the city as a spiritual and a cultural capital.

The decline of the industrial sector of the city that started in the early 80's, the presence of a lively medina, which was classified on the World Heritage list in 1981, and the history of the city are all factors that can be considered compatible with the development of cultural tourism there.

Through its orientations and through the venues it can promote, the FFMSM is coherent with both the identity of the city and the strategic expectations of the national economic policies (Vision 2010 and 20120 for tourism). The festival has therefore played a role, and not just from the perspective of cultural tourism, but also from that of the local inhabitants', and the study will show more about that in its discussion of impact.

⁸ UNESCO, Guide to the Development of Cultural and Creative Industries, op.cit. pp. 42-43.

⁹ This report will refer to the FFMSM also as the Festival.

¹⁰ Ministry of Economy, Finance and Industry (of France), DGCIS, E.Maurence, "La mesure de l'impact économique d'un événement touristique", December 2010, p.12.

¹¹ UNESCO, UNESCO Statistics Institute, Manual n. 1 of the UNESCO Framework for Cultural Statistics, 2009 – Measuring the contribution of cultural industries - Examination and evaluation of present methodological approaches, chapter 2: Methodological and practical approaches to measurement.

¹² UNESCO, Manuel n° 1, op cit, p.20 – cf. annexes 1.

The challenge of this study is to produce a canvass that is both simple and practical and that does neither rely on the provision of complex data, which are expensive to pursue, nor the production of an econometric model, which is difficult to handle. In fact, "it is preferable to produce⁸ systems of information that are appropriate and realistic than systems that are supposedly thorough and perfect but that demand much time and financial resources to produce ".The challenge

therefore lies in the choice of indicators, which should both be relevant and illustrative of existing or potential data.

What to measure? It is the initial question that comes before the definition of concepts and indicators that will be used to measure. Basically, this study aims to measure the impact of a cultural event, a music festival in this case, within a territory. What are the adjacent notions that need definition? What is an impact?

2.1 DEFINITION OF EVALUATION, IMPACT AND CONTRIBUTION

This report is a study of impacts and not an evaluation of the Festival⁹. Each analysis carries its own specificities even when there are crosscutting overlaps. In general, an

evaluation measures efficacy, efficiency, pertinence, sustainability and impact on the environment (see box with the definition provided by the EU).

BOX 2: EVALUATION CRITERIA, CREA.RE'S MEASURING IMPACT OF CCIS POLICIES, EU, 2011.

- **Relevance:** the extent to which the objectives of the support measure are consistent with beneficiaries' requirement and local CCIs' needs.
- **Efficiency:** how inputs (i.e. resources: funds, expertise, timeframe, management model, appropriateness of infrastructures; etc.) are converted to results (outputs).
- **Effectiveness:** the extent to which the initiative's objectives are achieved, or are expected to be achieved, taking into account their relative importance.
- **Impacts:** global effects on the creative ecology.
- **Sustainability:** whether the benefits produced by the support measure continue after the latter ends

The impact is "a consequence, a positive or negative evolution, more or less pronounced, generated through a phenomenon which, in this case, is the implementation of an event within a territory. Measuring an impact therefore consists in measuring a differential, a difference between two situations: one with and one without the event¹⁰."

In a manual dedicated to cultural statistics¹¹ UNESCO differentiates between two notions that are close to the notion of impact, namely those of importance/value and contribution.

Importance is a qualitative impact and is rather vague; contribution "is [...] one of the most basic approaches to measuring the economic contributions of the creative industries, whereas the concept of impact is inherently superior in its analytical approach¹²". This study will measure the impact of an event within a given territory based on existing or easily searchable data. The event is the FFMSM and the territory is the city of Fes including both the medina and the new city.

¹³ The inclusion or exclusion of visitors' expenditures in primary impact varies from one study to another. So, E. Maurence includes in the primary impact the expenditure of visitors to the territory, op.cit, P28.

¹⁴ Y.Bernard et J.C. Colli, Vocabulaire économique et financier, seuil, Paris, 1976, p.291.

2.2 DEFINITION OF IMPACT

The impact of a cultural event such as a festival is multi-layered – economic, social, cultural, promotional... (impact is often described as economic and social, the latter encompassing all aspects that are not economic). Some are measurable while others are what is described as qualitative:

- The content of the definition varies according to the studies;
- The definition of the territory in question and the temporality of the study (short, medium or long term);
- The reliability and accuracy of the statistical indicators that are available.

2.3 THE ECONOMIC IMPACT

The economic impact (the measurement of result x on a specific territory from an economic perspective) can be calculated at two levels: by looking at the expenditures and at the resources in order to balance the income generated through the event with the leakage outside the territory in question.

incurred by the participants at the festival (accommodation costs, meals, transportation, shopping, etc.)

- Induced impact¹³ is long term and refers to the totality of expenditures induced by the initial expenditures, both direct and indirect.

2.3.1 The economic impact at the level of expenditures

2.3.1.1 Direct, indirect, and induced impact The economic impact, which can be measured on short, medium or long-term basis, can be broken down into direct, indirect and induced impact.

- Direct impact refers to the expenditures incurred by the organisers of the festival (direct salaries of the organisers, various production costs, the commercialisation of the activities and their dissemination, etc.
- Indirect impact refers to the expenditures

Measuring the impact compels a look back at the concept of the economic cycle and the multiplier effect on the investment. The concept of economic cycle rests on the idea that the initial funds that are injected into the economy will generate a cycle of successive expenditures. The multiplier effect, which is a compound indicator, reflects in numbers the overall economic growth. The problem with this indicator is that it is rarely available because it involves the collection of a number of complex data and builds its case on hypotheses that are governed by this data. See the multiplier on the investment in Box 3.

BOX 3: THE MULTIPLIER EFFECT OF THE INVESTMENT.

The multiplier effect is a synthetic indicator resulting from the compounding of several data. It can be broken down into many multipliers: those that have to do with production, employment, the Added Value, tax receipts, credit, investment, etc. The last one is the most common. The multiplier from the investment is "a basic principle in the analysis of a situation: it explicitly examines the effect of the investment on the growth of revenue; it is also the coefficient of growth of the global revenue relative to the volume of additional investment"¹⁴.

Reference is made here to the multiplier of the investment or, more generally, to the expenses occasioned by the organisation of a festival. If the multiplier is equal to 2, for instance, it can be said that an expenditure or investment of one Dirham has generated an additional flow of

¹⁵Two other hypotheses have an impact on results: the fact of not taking into account local residents' expenditures, the expenditures of the accidental visitors (those who did not come expressly for the festival) or those who "changed their calendars" (i.e. those who were planning to visit this space anyway but changed their dates to coincide with those of the festival).

expenditures or investment of 2 Dirhams.

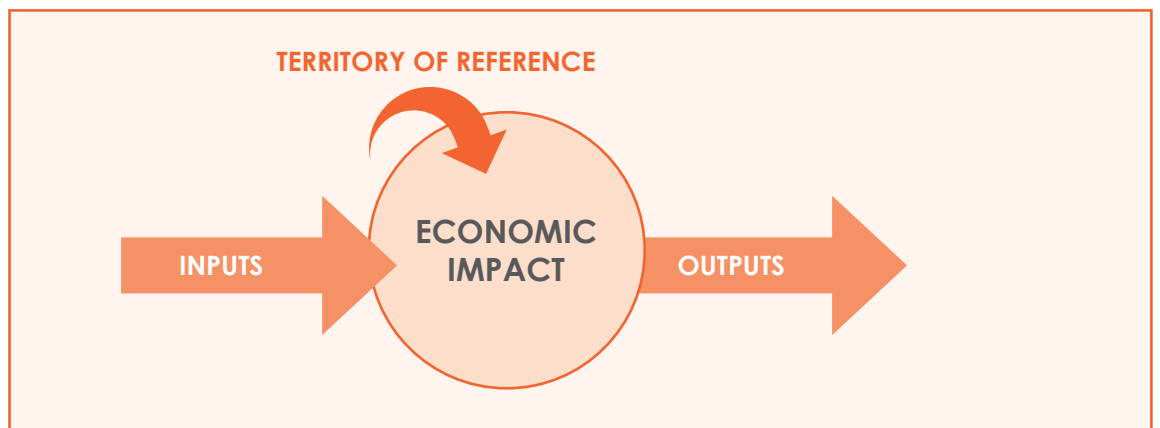
This multiplier could be inflated in function of the premise on which the case is built. In other words, if the territory under study is small, it is common to reduce the multiplier because of the much expenditure incurred outside the limits of this territory. In the case of this study, if the medina is considered as the space of reference, a substantial part of the expenditures of the organisers and the visitors will happen outside its perimeter (printing of communication documents, accommodation, transportation, etc.)¹⁵

For this study, we can only estimate the expenditures that are linked to the direct impact. The indirect one will be addressed through some indicators that will be explained in the second part of the study.

2.3.2 Analysis of entries (inputs)/ expenditures (outputs) or the primary direct impact

In answer to the query: what did the event under study bring in in terms of net investments (i.e. from outside the limits of the territory in question) and what are the amounts that leaked to the exterior and those that remained within the territory? One has to refer to the costs, which means that one has to turn to a benefits/costs or inputs/outputs analysis.

GRAPHIC 1: ENTRIES/EXPENDITURES RELATED TO A GIVEN TERRITORY.



Ideally, one has to keep track of the totality of costs within the short, medium and long term. However, some of them are difficult to assess such as the costs connected to the intensification of security in the city, or the extra cleaning services, or the hunt for 'imposters' who pretend to be guides who take advantage of the presence of higher numbers of tourists. The same should be applied to resources, especially to the follow-up of the various waves of expenditures that follow in the wake of the initial direct expenditures of the event (in the medium and long terms, the subsequent expenditures incurred by individuals and companies that

have benefited from the income of the implementation of the event). The inflow of revenues includes all funding coming from entities located outside the perimeter of the territory in question, the expenditures of visitors who also come from outside the perimeter, the acquisition of goods by the companies outside the perimeter, and taxes paid locally, etc. The outflow of funds includes everything that is spent outside the perimeter (fees for non-resident artists, suppliers from the outside, taxes paid to institutional entities outside the perimeter). As already mentioned, it is seldom that such data, necessary to calculate the indicators

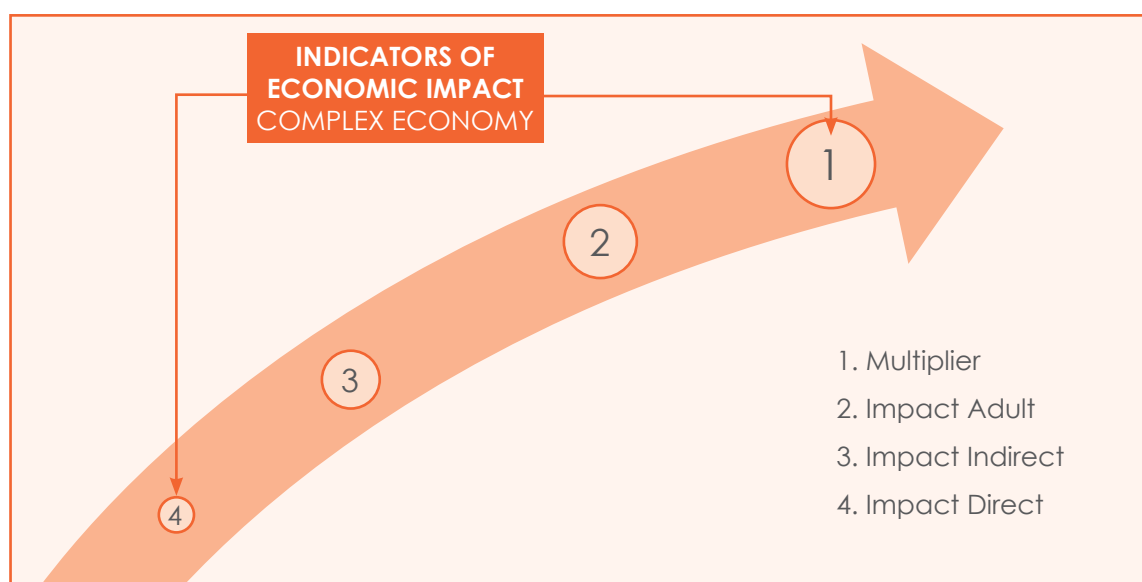
of impact, are available. They are presented here, however briefly, in order to respond to the 3 objectives of the study, which include the presentation of a theoretical paradigm that could serve advocacy initiatives and that could be illustrated through the analysis of the FFMSM.

From here, the study will show how the economic impact can be roughly measured based on existing data and in the absence of an in-depth and specific research. This first step could pave the way-at a later stage- to a more detailed and more complex investigation

while keeping in mind the balance between the costs of a statistical investigation and the expected result.

To conclude: The indicators of the analysis of the economic impact of a cultural event may increase in complexity according to the data that can be mobilised. The calculation of the direct impact is the most basic up to the multiplier which is a composite indicator and more sophisticated, going through the indirect and induced impact. Figure 1 summarises this progression and Box 3 contains the key elements of the theoretical framework.

GRAPHIC 2: INDICATORS OF ECONOMIC IMPACT: FROM THE SIMPLEST TO THE MOST COMPLEX.



This graphic illustrates the scheme applied to the FFMSM, which measures the direct expenditures of the Festival. Based on that, a simple analysis of inputs/outputs, which tries

to 'make do' with available data, will provide what is defined (for this study) as the direct economic balance (see details of the scheme in Graphic 2 above).

BOX 4: WHAT IS THE VALUE OF THE THEORETICAL SCHEME?

- The economic impact can be broken down into three components: direct, indirect and induced.
- The economic multiplier is a synthetic ratio that aggregates the three components and the expenditures generated by festival participants on a territory. It is an interesting figure but needs to be handled with some reservation given the questionability of the data.
- The hypotheses espoused ahead of the calculation of these indicators have an impact on the result, including the size, or surface area of the territory under study.
- For a global vision of the economic impact, integrating an analysis of the expenses/leakages and the resources/income of a cultural event is of value.
- Assess the cost of the data collection and its analysis versus its benefit and its reliability.

2.4 SOCIO-CULTURAL IMPACTS

2.4.1 The risk of inflating the economic dimension

The economic dimension of culture was ignored for a long time, today however, the risk is to inflate it. The 2005 UNESCO

convention on the Protection and Promotion of Cultural Diversity and Cultural Expressions underlines the need to recognise the double value of cultural goods and services, as already mentioned.

BOX 5: RECOGNITION OF THE DOUBLE VALUE OF CULTURAL GOODS AND SERVICES THE UNESCO CONVENTION ON THE PROTECTION AND PROMOTION OF CULTURAL DIVERSITY AND CULTURAL EXPRESSIONS.

Cultural activities, goods and services have both an economic and a cultural nature, because they convey identities, values and meanings, and must therefore not be treated as solely having commercial value. In this case, the objective is to create the conditions that would allow the various cultures to flourish and interact freely and hence enrich each other mutually. Using the economic value of a cultural event, as an instrument will risk masking its attributes as culture (creativity, identity, well-being, social ties, etc.) to the benefit of economic indicators such as job creation, the benefits distributed, the level of hotel occupancy, etc. There could however be a discrepancy between the two dimensions, and this fact reduces the argument in favour of « cultural exception », which supports the fact that « cultural goods and services are not products like others because they cannot be reduced uniquely to their commercial dimension¹⁶».

2.4.2 Other types of impact

The impact on the environment is not part of this study. However, the impact of the Festival on the venues used, on artistic creativity, and

on the image of the city will be part of the discussion. Moreover, some remarks and hypotheses will be formulated concerning impacts on the mental representations and the local urban identity.

2.5 PROCESS OF THE IMPLEMENTATION OF THE STUDY AND SOME HYPOTHESES

2.5.1 Process of the implementation of the study

This study was elaborated based on the research of existing documentation and interviews.

2.5.1.1 Research of existing documentation

For the elaboration of the methodological approach, reference was made to an institutional and academic bibliography. The documentation on Fes and on the Festival included a study of the festival documents and logs, and notes and reports, which the researcher received in the form of physical

documents or via email or which were available on the internet.

All statistics relative to impacts of accommodations were available at the Delegation for Tourism in Fes and at the Ministry in Rabat.

Unfortunately, the documents concerning the actual operation of the Festival and its implementation were not available, contrary to communication documents, which were many and of good quality (programmes, flyers, etc.) According to information collected through the research, the need to produce a narrative and a financial report is recent and dates back to

¹⁷ E. Maurence, op.cit. p. 29.

the creation of the Esprit de Fes Foundation, as will be seen further on in the report. Also the size of the permanent team working on the Festival and the substantial turnover do not make the collection of information over a long period an easy task.

2.5.1.2 Interviews

Interviewees included key persons working within the team or in the tourism sector in Fes. A dozen interviews were conducted with members of the Festival, representatives of Bed & Breakfast, one partner of the Festival, restaurant owners and crafts merchants. (See details in annex 1, p. 38)

The objective of these interviews was two-fold: collect information and gather reactions to the collected data.

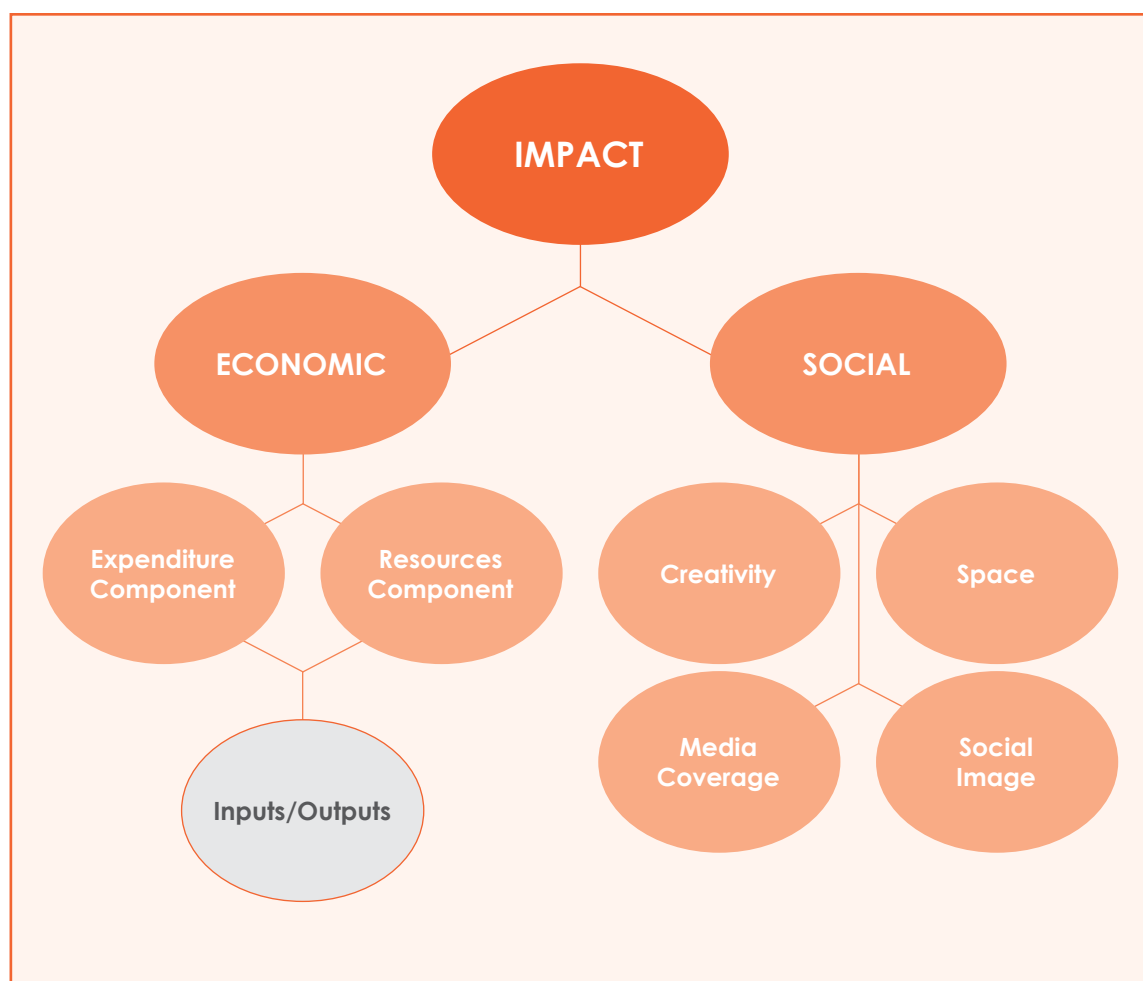
2.5.2 The hypotheses and the indicators selected

The city of Fes, identified as the territory of reference for the research, includes the Medina and the new city.

This study will define the primary impact in a restrictive way. It will include expenditures incurred by the organisers only (whereas visitors' expenditures will be included in indirect impacts). This restrictive definition is rather frequent in France¹⁷. The concept of Inputs/Outputs is also defined in a slightly different way in order to make it compatible with available data.

On the medium and longer term, some significant indicators will be presented, which reflect a better visibility and an improved image of the city in relation to the Festival.

GRAPHIC 3: DIFFERENT TYPES OF IMPACT OF A FESTIVAL.



¹⁸ Starting from this date, the Festival became an annual event.

3.1 HISTORICAL BACKGROUND, OBJECTIVES AND STRUCTURE OF THE FFMSM

A group of teachers took the initiative and created the Festival in 1994. The second edition, implemented in 1996¹⁸, took status when it became associated with Fes Saï's, an NGO that includes amongst its members city notables close to local and national authorities, and whose objective is to bring life to the city and contribute to its social and cultural development. The establishment of a new entity - Esprit de Fès Foundation - in 2005 intensified the support of local institutions (municipalities, provinces and regions) for

this event, mainly through the allocation of a substantial annual subsidy and the facilitation of services (security, street cleaning during the Festival days, etc.). The Foundation wanted to replicate the positive experience of the Festival to other events running through the year, as a way to ensure the sustainability of cultural development initiatives. Unfortunately, the culinary Festival, the "jazz in riad," le "slam and klam" were short-lived (refer to Box 6 for Festival specifications).

BOX 6: SPECIFICATIONS ABOUT THE 2011 EDITION OF THE FESTIVAL.

"The Esprit de Fes Foundation builds its vision on the principle that culture and cultural tourism constitute a real motor for sustainable development where the initiation, planning and accompaniment of activities that promote such development in the city of Fes is a priority objective. The Foundation works at national and international levels to promote the image of Fes as a haven of peace and a supporter of cultural and intercultural dialogue. It has set out to enhance both the tangible and intangible heritage of Fes and uphold creativity and innovation, while promoting the links between the secular soul of the city and its future trajectory."

The Festival has grown through expanding into parallel activities:

- The "Off" Festival, which changed its name to Festival of the City in 2000, offers free admission to performances; it was a response to the frequent criticism of the price of tickets for the "in" festival, which were considered too high by local standards.
- The introduction of encounters under the title of "the Soul of Globalisation" in 2001:
 - these encounters enhance and develop the spiritual dimension of the Festival through the participation of intellectuals and key figures.
 - Sufi Nights, organised at Dar Tazi (administrative headquarters of the city) following the concerts of Bab Al Makina, with free admission.
 - The children festival.
 - Painting exhibitions.
 - Film projections.
 - Heritage days

3.2 FUNDING

3.2.1 An incremental budget growth

The Festival budget witnessed significant growth since its adoption by the Fes Saï's Association. From 1 million MAD when it started, it hovers between 21 to 24 million

MAD these last years, with three major sources of funding: public (the authorities), private and auto-financing. Part of the funding is in cash and part is in kind (airplane tickets by Royal Air Maroc, free nights in hotels, etc.)

¹⁸ Starting from this date, the Festival became an annual event.

Table 1 Source: communiqué of the MAP, Festival activity and financial report.

Table 2 Source: Festival report

TABLE 1: EVOLUTION OF THE BUDGET SINCE 1994

YEARS	AMOUNTS IN MILLIONS OF MAD
1994	1
2008	11
2010	13,5
2011	20
2013	23
2014	21

The FFMSM divides sponsors into 7 categories based on the amount they donate, and it describes in details what the Festival offers to each of them in return for their support – tickets, publicity, and exclusive evenings (see Table no. 10). Sponsors increasingly negotiate to get advantages

beyond the inclusion of their logo and their visibility. The Festival has therefore acquired the habit of naming an event after the sponsor's brand name. This "naming" practice was apparent with the Bourges Festival, which was named "The Bourges Spring – Crédit Mutuel" in 2011.

TABLE 2: SPONSORSHIP CATEGORIES.

CATEGORY	AMOUNT OF CONTRIBUTIONS (DH)
Institutional partner	2,000,000
Official sponsor	1,500'000
Forum partner/ Sufi nights	700,000
Show partner	300,000
Exhibitions partner/ educational activities	200,000
Friends of the Festival	100,000
Patrons	Less than 100,000

3.2.2 A budget fueled by institutional subsidies, sponsorship of private and public entities.

The sponsorship of a Festival is a difficult exercise and fundraising is renewed every year. As most similar events organised around the world, the capacity for the Festival to finance itself is weak.

Governmental support covers a good part of the budget (28 and 30% respectively in 2013 and 2014). Since the creation of the Esprit de Fès Foundation in 2005, the municipality of Fes and the provincial and regional council have all become partners and each offers a contribution of 2 million MAD to the Festival,

which amounts to a total of 6 million. Public enterprises are also important and consistent supporters of the Festival (22 and 24% of the budget over the last two years), however, they have reduced their contributions these last years – for example, Royal Air Maroc has drastically reduced the number of free tickets. In fact, important public enterprises such as Royal Air Maroc, NOOA, NRO, NMTO are increasingly solicited for support by other festivals, and more particularly by Mawazine, in Rabat. Mawazine has been classified as the 2nd Festival by MTVlggy and its budget, which is not made public, is probably much more important than the one in Fes.

Table 3 Source:

Festival data

¹⁹ During an interview.

²⁰ E. Négrier, in Institut numérique, op.cit

²¹ Cited in Institut numérique, "Chapter II: the Economy of Festivals" op.cit.

Table 4 Source:

E. Négrier cité par Institut numérique.

TABLE 3: FUNDING SOURCES

FUNDING SOURCES	YEARS/%			
	2013	%	2014	%
Funding source	MAD		MAD	
Private sponsors	8	33	6	29
Institutional sponsors – grants	7	28	6	30
Public enterprises – public sponsorship	5	22	5	24
Self-financing	4	17	4	17
Total	23	100	21	100

Self-financing, which amounted to 17% of total budget in 2013 and 2014 respectively, is essentially generated through ticket sales and the rental fees for stalls during the Festival. One of the major challenges of such events all around the world, including festivals, is that they rarely manage to generate profits or to break even. "Festival budgets are constantly under pressure. For the 9 editions of Nuits sonores, the economic fallout varied between -3% to +3%. "We function within an economic setup where the margin of manoeuvre is precariously narrow and this instability re-emerges each year: the sheerest incident can prove risky! We really have no latitude!" says Vincent Carry, the General Coordinator of Nuits sonores¹⁹.

A study on a sample of 72 festivals²⁰ in France

shows that those who come close to self-sufficiency (i.e. over 80% of the budget) are rare – only two cases. Generally, those who have the ability to self-finance belong to two opposite categories: they are either very small or very big, as is the case of Glastonbury, an English festival that itself sponsors other activities²¹. The other festivals remain dependent of public or private sponsorship with 85% of them covering less than 40% of their budget, as the table below indicates. These budgetary difficulties probably explain the fact that since 2010, the Foundation focused on the organisation of the Festival and stopped its other activities (gastronomy, jazz...) despite an improvement in the box office returns thanks in part to the sale on the Internet since 2011.

TABLE 4: SELF-FINANCING FIGURES FOR A SAMPLE OF 72 FESTIVALS IN FRANCE.

PERCENTAGES	NUMBER OF FESTIVALS	%
Below 20%	17	24
Above 20% and below 40%	44	61
From 40% to less than 80%	9	13
Above 80%	2	3
TOTAL	72	100

3.3 ECONOMIC IMPACT ON THE CITY

As already mentioned, the economic impact can be broken down into three types: direct, indirect, and induced. These types integrate the totality of the expenditures on the short, medium, and long terms of the Festival. In order to complete the analysis, it is important to include the revenues as well as the expenditures. The concept of cash flow (inputs and outputs) was therefore introduced in order to reflect the resources the Festival has mobilised and, in terms of expenditures, what has been injected outside the territory of reference (in parallel, it also reflects the resources the territory has preserved within).

3.3.1 Direct economic impact on the city (in the short term)

Using the case of Fes, the study will illustrate how the direct impact may be configured through a calculation of the totality of direct expenditures occasioned through the organisation of the Festival.

The indirect impact (expenditures incurred by Festival participants outside the territory of reference) will not be included. In general, and in the absence of any studies, it can be deduced through multiplying the average

expenditure of the tourist with the number of festival participants coming from outside the territory. For the purposes of this study, the first number is available – 897 MAD in 2013, while the second one is not. There is an estimation of the number of participants, but there is no data that indicates the average days of stay and none that measures the number of those coming from outside the territory²². Primary direct impact: expenditures incurred during the Festival in 2013 were sorted between those incurred inside or outside the perimeter of the territory. Those within include salaries for the local team, translation fees, a portion of artists' fees, a portion of the publications, etc. Expenditures outside the territory include international artists' fees, their travel expenses, communication costs outside the territory, etc.

The result of this exercise shows that 61% of the budget, which equals 14 Million MAD out of a total of 23 Million MAD were spent outside the perimeter and only 9 Million MAD were spent locally. It is mainly the costs of the artists' fees and their travel expenses that explain this leakage to the outside.

TABLE 5: LOCAL VS. EXTERNAL EXPENDITURES IN 2013.

ORIGIN	AMOUNT IN DH	PERCENTAGE
LOCAL (within territory of reference)	9,000,000	39%
Outside territory of reference	14,000,000	61%
TOTAL	23,000,000	100

3.3.2 Direct economic balance (short term)

This section will look into the Festival resources, which include the following inputs:

- Donations and other forms of sponsorship coming from a geographic area beyond the limits of Fes: the donation provided by the Regional Council was thus included

as an input whereas the one provided by the city and the Municipal Council were not because they are part of the territory of reference. In the same way, donations coming from large companies outside the territory were considered as inputs whereas the ones from companies that are based in Fes were excluded.

3.0

²³The term for a paying ticket that gives access to all festival activities.

²⁴The year for which the data is available.

- Ticketing income - 90% of it - was calculated as input, based on an estimation of the person responsible for ticketing. According to many observers, it is rare that the inhabitants of Fes buy tickets: most of those who attend the activities (especially those of Bab al Makina) benefit from free tickets coming from different sides (because they know the organisers, the sponsors, etc.). This assumption is plausible because the class of professionals who can afford tickets are generally VIPs who are invited or have access to free tickets. For the rest, tickets are beyond their reach. For the last edition of the Festival, the price of tickets varied between 100 MAD (9,5£) for the Forum, 150 MAD (14.5£) for the Batha Museum on weekdays, and 600 MAD (58£) for Bab al Makina. A “pass”²³ that gives access to all the concerts and the Forum costs 3250 MAD (305£).

In 2013²⁴, the budget of the Festival went up to about 23 Million MAD of which 14.5 M came from outside Fes (private donations, business sponsorships, funds coming from institutions

outside the territory of Fes, and tickets sold to non- residents). The remaining 8.5 M came from within the territory of reference.

On the short term, and excluding the expenditures of visitors within the perimeter (Accommodation costs, restaurants, and shopping), the net income or net benefits for 2013 amounts to about half a million MAD. Direct inputs and outputs almost balance out (see table and graphic below). To sum it up, and for the short term excluding the expenditures of participants, the Festival brings in money to Fes, which is in turn disbursed to the outside.

In conclusion to this section, one could say that in the short term, inputs and outputs are almost equal. All other expenditures of the festival participants coming from outside the perimeter, and incurred on the spot (accommodation, restaurants, purchases of products and services), by individuals (corresponding to salaries received) and by companies providing services to the Festival (via orders) are indirect earnings and constitute net induced income for the city.

TABLE 6: INPUTS/OUTPUTS SPECIFIC TO FES AS A REFERENCE TERRITORY IN 2013.

	Resources Million MAD	Expenditures Million MAD
LOCAL (within territory of reference)	8.5	9
Outside territory of reference	14.5	14

GRAPHIC 4: INPUTS/OUTPUTS RELATIVE TO FES AS REFERENCE TERRITORY IN 2013.

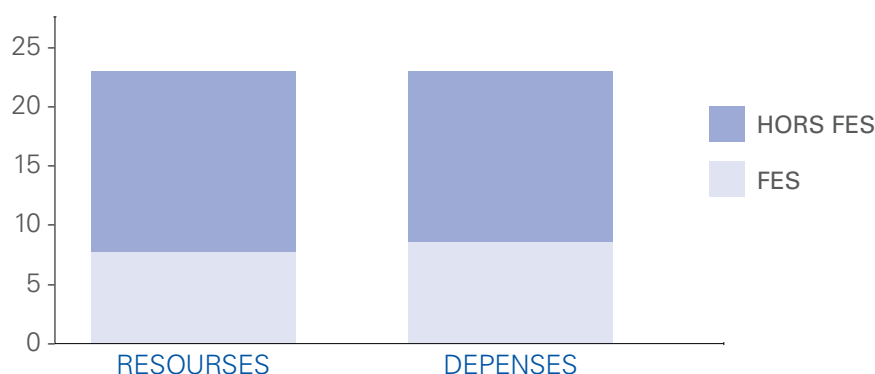


Table 7 Source:
Financial report 2010,
Festival report 2011.

What would be the impact on the hotels and catering (restaurants)? What are the main budget lines of expenditures? Could expenditures inside the territory of reference be increased and leakages reduced? These questions have to do with what the Festival is all about and what purpose it aims to achieve. They have to be examined against the indirect and induced economic impact as well as against other forms of impact (media coverage, creativity, social, etc.)

3.3.3 The Festival budget line items

The budget can be itemised as follows: production, communication, and artistic contributions. It is this last budget line (artists' fees and their travel and accommodation costs) that takes up most of the budget and it amounted to 51 % and 72% in 2013 and 2010 respectively.

TABLE 7: ITEMISATION OF EXPENDITURES FOR FFMSM 2010 EDITION (RELATIVE TO INPUTS)

	Amount in MAD	%
Production	2,138,091	20
Communication	849,457	8
Artistic input	7,702,232	72
Total	10 689 780	100

The breakdown of the expenditures as shown above raises the issue of designing the artistic programmes. Stars attract a wide audience and bring higher visibility but they cost a great deal. A closer look at the programmes reveals that two or three renowned artists are invited each year and they are programmed to appear on the first or last weekend of the Festival (the Festival usually starts on the first Friday of June and closes on the Sunday of the weekend after). These days correspond to a peak in attendance by both the locals and those who come from outside the territory and as such, justify these costs. In fact, rates are adjusted in function of the popularity of the performing artists.

The printing of various documents (brochures, flyers, reviews, etc.), previously executed in Rabat, was done locally since 2012. The print shop has since renewed its equipment in order to meet the standards required by the Festival. On the other hand, the operational costs of the Festival are already reduced, as will be seen in the next section. However, a

severe reduction of the direct costs of the technical team, who benefits from free of charge venues in the Medina (and which, in any case, are in bad condition), will not have much impact on the budget because a big portion of it goes to pay artists.

3.3.4 Employment generation

The structure of the Festival includes six departments: production, administration, fundraising and communication, technical, accounting and logistics/reception. It employs some ten people on a permanent basis, of which seven are senior. It is worthwhile noting that this team was working for several years without benefiting from any social security. Temporary jobs, however, can reach a high of a 100 during the event. The Festival also benefits from a team that works on a temporary basis in many countries across the world in order to ensure its dissemination (United Kingdom, France, Spain, and North America and Asia). Indirect employment generated by the

²⁵ It is worth noting that the Medina of Fes is mostly pedestrian, except for the neighbourhoods closest to the gates.

Table 8 Source:
Tourism Delegation of Fes.

Festival has not been examined (it requires an investigation with companies that work for the Festival.) This event contributed to enhance a few local businesses. It was the case with the printing services (festival documents, flyers, programmes, etc.), which were commissioned to one of the best run businesses in the city, and the catering organised at Bab El Makina, which was commissioned to a small local company.

3.3.5 The impact on hotel and restaurant businesses

What is the impact of the Festival on local hotels? Overnight stays and the number of arrivals are indicators of the touristic appeal of the city. An analysis of these indicators between 2000 and 2013 do not show an increase during the Festival season. However, many witnesses confirm that the figures are not reliable: according to representatives of the Tourism Delegation, for they are minimised for tax concealment purposes. Contrary to this view, hotel owners affirm that the figures are inflated in order to cover up for the undeclared overnights and to show an increase in tourism, in conformity to the state predictions.

The establishment of the Festival in June, following its first edition, aimed to increase hotel occupancy, which was very low at this time of year during the 90's. Whatever the case may be, figures for overnight stays and arrivals should be considered with care although they do indicate the general trends. Between the years 2000 and 2014, it can be noted that the numbers of overnight stays and arrivals have increased with a few exceptions

when there was a decline (2001 -20013, 2008, 2011) or an increase (with a peak year in 2010). This increase amounted to an average of 7% going from 49,767 overnight stays and 23,835 arrivals to 77,050 and 369,066 respectively. Interviews with owners of B&B in the Medina and the President of the RCT show a discrepancy in their views regarding the impact of the Festival on occupancy.

According to the Vice-President of the Association of B&Bs, the Festival barely covers one third of the room capacity since 2011, a poor year marked by the attack on the Jamaa Al Fna in Marrakesh. In contrast, in previous years, and namely in 2008 and 2010, bookings were full one year ahead thanks to Festival aficionados. The former president of the association confirms this statement. On the other hand, B&B owners, who offer varying numbers of rooms at a varying range of prices confirmed having 100% occupancy, all thanks to Festival goers, particularly during weekends when they often have to redirect guests to other B&B's.

Why such discrepancy? Is it specific to varying management methods amongst B&B owners? Is it their location and their proximity to the Festival venues²⁵? Is it the increase in the number of B&Bs? Presently, there are about 100 listed by the Tourism Delegation (see table below), The Tripadvisor site counts 170 and it would be 300 in total according to the vice-president of the association of guest houses in the medina (which regroups about thirty). It is worth mentioning that the first was created in 1998.

TABLE 8: NUMBER OF LISTED B&BS IN THE MEDINA BY YEAR.

YEAR	B&B
2010	56
2011	60
2012	79
2013	88
2014	93

Table 9 Source: Festival report 2014 and interviews.

The issue of the impact on restaurants and small businesses is even more difficult to measure. According to the Vice President of the Association of B&Bs, food consumption remains unimportant because of the busy programmes that leave festivalgoers outdoors most of the time. A restaurant owner in the Medina affirms the contrary. According to him, this is practically the only time of year when at least 4 shifts are served (for lunch, dinner before the show, habitual customers, and dinner after the show).

3.3.6 Number of Festivalgoers

An estimation of the number of festivalgoers is especially difficult because of the free shows. For 2013, the Festival report provides detailed estimation per site, providing the exact number of occupancy for some (see Table no.9 below). The estimation is that there were some 700,000 attendants for that same year. Mawazine declares a figure of 2.6 million spectators. However, and according to the President of RCT, the FFMSM attracts more participants from outside the territory.

TABLE 9. NUMBER OF FESTIVALGOERS VS. CAPACITY OF VENUES.

Sites	Estimated number of Festival goers	Capacity
Bab Boujloud	600,000	60,000
Dar Tazi, Sufi nights	9,600	?
Entertainment around the Festival	85,000	
Bab Makina	50,000	4,000 to 5,000
The Forum, Batha Museum	1,600	600 to 800
Musée Batha (concerts)	15,000	600 to 800
Nights of the médina	10,000	
Dar Mokri		120
Dar Adyel		60
Total	771,200	

This section discusses the impact of the Festival on the space and on creativity. A few

hypotheses will be drawn regarding its impact in terms of the image and identity of the city.

4.1 THE STATUS OF THE FESTIVAL WITHIN THE CITY

What is there to see within the space of the city after twenty years? This question may seem out of place because a festival is essentially short-lived. In any case, most of the spaces in which the Festival events take place come to life only because of it.

Most of the activities take place within the Medina, and some of them are organised in houses that are rather secluded, such as Dar Adyel. This choice of venues forces festivalgoers to discover the neighbourhoods in which these houses are located. On the other hand, it complicates the issue of security, the last time the Festival was held, security forces were posted along the route to these neighbourhoods.

In 1994, the Festival was organised at the gates of the Medina, in the city hall. As the years passed, and with every occasion of the Festival, more venues were included in different areas of the Medina as well as in the new city. Some of these spaces have become constant venues, such as Bab Al Makina, Batha, Dar Tazi, J'nan Sbil and Dar Adyel, in the Medina, while others have been abandoned. For the 'off' festival, the Boujloud Square has become the venue of choice. Some of these venues are elaborated on below.

4.1.1 Bab Al Makina

In general, but also within the medina, one of the main issues related to rehabilitation is to ensure the reuse of the rehabilitated spaces. Bab Al Makina, which was rehabilitated between 1996 and 1998 through an

initiative of the Fes Sais Association (Project Supervisor) and with financial support from the Arab Fund for Economic and Social Development, was revived thanks to the utilisation of the Festival. Other events have neither the funds to ensure logistical support (stage, chairs, sound system, etc.), nor the exposure and the size of the audience required (capacity of 4000 to 5000 places). Recently, the Amazigh Festival, also sponsored by the Esprit de Fes Foundation, has presented a show within this Bab Al Makina right after the FFMSM in order to take advantage of the logistics already available.

4.1.2 Dar Adyen

Dar Adyen, a monument rehabilitated by UNESCO with a fund from the Italian government, was inaugurated in 1999. Used as a conservatory for traditional music, this house is under-used throughout the year and the Festival contributes to its revitalisation.

4.1.3 Batha Museum

Forum encounters in the morning, afternoon concerts as well as a few evening concerts are organised in the Batha museum. These events are organised outdoors in the gardens and terraces and not in the museum halls. In Morocco, visits to museums are low: the ratio of visitors to the total population was inferior to 1% in 2006 and 2007. By way of comparison, this ratio is 27% in the USA, in 2002. In France, museums have attracted 33 million visitors in 2007. Given these figures, could the organisation of events be considered as a way to contribute to the

revitalisation of these spaces or is it a factor for their degradation? Should it be encouraged on the condition that it respects a set of rules for the use and protection of these spaces?

In the new city, many spaces were mobilised for the artistic presentations of the 'off' festival - the race field, the Moulay Kamel space, Bensouda – before being abandoned for the exclusive benefit of Boujloud Square.

4.1.4 Boujloud Square

It was rehabilitated with a World Bank loan that amounted to 11.3 Million MAD over the period between 2001 and 2005 . This space, although rehabilitated and which according to the Festival records has a capacity for 50,000 people, is also struggling to secure regular programming. The Festival is one, if not the only, major event taking place there.

4.2 THE IMPACT OF THE MEDIA

The impact of the Festival is major on the image. It attracts many journalists both Moroccan and foreign, television stations, radio stations. It is also ubiquitous on the internet.

In 2010, more than 300 Moroccan and foreign journalists from 130 networks attended. More than 460 articles were published in 60 different newspapers and 260 on the internet. In 2012 and 2013 respectively, 60,000 and 76,329 visitors went to the Festival site and 70,000 subscribers received the newsletter, which was disseminated through the social networks (Facebook and Twitter), In August 2013, 40,000 'like' were counted on the Festival webpage and 85,000 views on YouTube and blogs.

The UNO designated the Festival as one of the seven events that have contributed in a

significant manner to the dialogue between civilisations.

According to the President of the RCT, the Festival has contributed to the image of Fes as much as, if not more, the whole publicity the government has put out around the Regional Development Plan for Tourism for the city of Fes . A former president of the Association for B&Bs confirms the positive role of the Festival in promoting the image of the city as a cultural and heritage space, and for its contribution to dialogue.

The Festival is an event that has, for the past 20 years, lasting over a period of ten days, presented Fes, through the themes it has adopted, as a city that enjoys a heritage and a spiritual dimension. It has thus strengthened the notion that this city is a spiritual capital and that" the core activity of the Festival of World Sacred Music» is to" elevate music beyond the political contingencies and clashes of our time».

There is consensus as to the value of the communication the Festival undertakes even if there is much criticism in other areas (the programmes, the high cost of tickets, the elitist profile of the activities, weak mobilisation of local artists, etc.).

4.3 THE CULTURAL IMPACT

Does the Festival provide support to local and national artists? Does it have an impact on creativity in Fes and in Morocco? Creativity is measured through the participation of local and national groups and through the number of artistic creations produced for the Festival.

Creative production is scarce; in total, there are three examples, of which one was realised to celebrate the 20th anniversary of the Festival. Creative productions are expensive and involve a lot of work prior to the Festival (a

logistical set-up to ensure the implementation of the many rehearsals) and they involve a risk (like any other artistic creation).

On the other hand, local groups are often merged with foreign ones to produce a common production. The case of merging a group from Fes specialised in Andalusian music and another specialised in Jewish music is an example of this fusion and a symbol of the inter-religious dialogue that the Festival promotes. The French Institute, partner of the Festival, has also supported creative works of young groups.

In general, however, the “in” Festival mostly promotes foreign artists, and includes one or two national groups. For local artists, being part of the Festival is a much sought after opportunity. On the other hand, the “off” Festival mostly introduces Moroccan groups, and not necessarily from Fes.

This state of affairs is not conducive to supporting local and national groups and the impact on creativity is indeed weak. The Festival bets on what is already out there and does not support new productions.

4.4 DOES THE FESTIVAL PROMOTE SOCIAL TIES AND DOES IT CONTRIBUTE TO BUILD THE IMAGE?

As a cultural event, the Festival contributes to enhance social ties and self- image. In order to better understand its social impact, it is important to mention the socio-economic conditions of the city of Fes.

The Festival was born in a context of crisis of the city during the 80s when the new city was marked by an industrial decline and the medina was crumbling under the weight of many problems (population density, a level

of poverty superior to the national average, a degradation of the built environment, abandoned rundown houses, a depressed real estate market where the offer by far exceeded the demand, etc.). This social and economic crisis was compounded by a sense of unease among the population, which culminated in manifestations and setting of fire during a day of national strike.

A sense of marginalisation overshadowed this bleak socio-economic situation, because of the Casablanca/Kenitra maritime axis, there was a mounting discourse that attributed the decline of the Medina to the departure of the well-off class and the accretion of a rural population, which went back to the 60s. This cliché discourse (which like other discourses of this type has elements of truths) went hand in hand with a quasi-total absence of actions of any consequence on the part of the authorities, the municipality or the private sector that could meet local needs.

This example is important: in 1990, the total of investments within the Medina according to ADER , amounted to 88 million MAD. This figure covers private investments, sponsors, contributions of the State, the municipality and local associations as well as those from foreign entities (such as the AFESD, BAD, UNESCO, the Italian government, the Queen of Denmark, and so on). This amount is derisory when compared to the estimation of needs quoted by UNESCO in 1985 , which amounted to 541 million USD (equivalent to 5015 million MAD).

The Festival has managed to bring to Fes well-to-do Moroccans from other cities (Rabat, Casablanca) during its implementation. Some have reopened their homes and some have restored their family homes where they organise stays and catering.

According to public opinion, the Festival has transformed the medina from a space where one only indulges in lamenting to one where concerts, exhibitions and debates are taking place.

Since the beginning of the 21st century, and just in the case of the Medina, public, private and municipal investments (although many observers consider them hardly visible, too slow to realise and of a limited scope) have alternately accelerated or slowed down (if the real estate market is a scale, there is a current slump following a particularly active period). The objective of this study is not an evaluation of the economic evolution of the city of Fes: it is to show how an event has contributed to restore confidence in the future of the city, to recreate social ties and to lift the sense of marginalisation and isolation.

According to the Esprit de Fes Foundation, the Festival is undoubtedly one of those events that have contributed to maintain the attractiveness of the city and have helped it renew links with its golden age through recreating its image as a festive and cultural city. "As heir to the golden age of Andalusia, Fes must recreate a contemporary Andalusia where religions and cultures, each with its

own specificity, can unite in their quest for beauty and universal values!"

As they air concerts on a regular basis over the years, Moroccan television stations and radios ensure the continued presence of this event and the message it tries to promote.

Free of charge concerts, henceforth confined only to Boujloud Square in the Medina, attract large crowds that are the occasion of festive gatherings. The concerts organised at Dar Tazi (headquarters of the Festival) represent some of the rare occasions where different social groups, the inhabitants of the neighbourhood who appreciate the shows (free of charge), spectators of the 'in', and foreigners or non-resident Moroccans, rub shoulders.

The Festival is often subject to criticism of various kinds: elitism (because of the price of tickets and the choice of activities); the exclusion of local talents from centre stage; the fact that the programme, which sometimes features standard stars, deviates from what should be a repertory of sacred music. However, beyond this criticism lurks an indisputable sense of pride.

POINTS TO KEEP IN MIND RELATED TO THE RESEARCH METHODOLOGY

- A study of impact is different from an evaluation of an event because it answers a different set of questions.
- The economic impact can be measured by means of a variety of tools with varying degrees of complexity, and it requires the collection of specific data, of econometric models and determining hypotheses.
- The economic impact can be analysed through different approaches:
- 1) Expense perspective; 2) resource perspective; and 3) comparison between the two perspectives. In fact, the issue of the economic impact as a determinant revolves around how many resources were mobilised from outside the defined territory, what were the amounts that were re-injected outside and those that remained within.
- For the purposes of this study, the direct impact comprised the direct expenditure generated through the implementation of the Festival. Breaking down expenditures according to whether they were incurred within or outside the territory of reference (and in function of the available data), provides a clear idea of the economic impact of the event on the short term.
- The indirect impact (i.e. the expenditure of the spectators coming from outside the territory of reference) can be estimated through the average expenditure of tourists (a figure which is generally available) and the number of spectators coming from outside (more difficult to identify).
- The short-term direct economic balance, a simplified indicator that is proposed in this study, refers to the exact balance between expenditures and resources.

IMPORTANT POINTS RELATED TO THE ECONOMIC IMPACT OF THE FFMSM ON THE CITY

- Over 23 Million MAD in expenditure in 2013, 14 Million MAD, equivalent to 60% of the total, were expenses incurred outside the territory and 9 Million MAD were local expenditures.
- That same year, the funds that the Festival mobilised came to a total of
- 14.5 Million MAD from outside the territory and 8.5 Million MAD from inside.
- The short-term direct economic balance was equivalent to 0.5 Million MAD, which was an income for the city of Fes (excluding the expenditures of the festivalgoers) and it reflects a quasi-balance. All other expenditures, notably those of the festivalgoers are considered as net economic benefits for the city (mainly accommodation and restaurants, but also shopping of crafts and other commodities).
- The impact on accommodation varies: for some it involves full capacity, for others minimal capacity. The data (statistics of overnight stays) provided by the Ministry of Tourism, whose reliability is considered questionable by some, does not show a peak during the Festival season.
- The Festival re-injects a major part of its resources outside the territory (as indicated for 2013 but it would probably be similar for the other years); at the same time, it pumps an equal amount of funds into the territory. For the city, it is a zero sum from the perspective of direct economic impact but a lucrative operation when the indirect and induced impacts are factored in. Finally, what is the scope of the overall gains for the city? A specialised survey is necessary to calculate this figure.

IMPORTANT POINTS RELATED TO THE SOCIAL IMPACT OF THE FFMSM ON THE CITY

- In the case of the Festival, the social impact – necessary to cover the socio-economic dimension of the cultural event - covers an analysis of the impact of the event on creativity, the space, the image and the social links.
- The impact on the space is positive because the Festival has contributed to the revival of spaces that are normally shut or under-used.
- The impact on the creativity is very weak because the Festival features mostly established and well-known talents and hardly contributes to new productions, which are costly and constitute a risk.
- The Festival is highly mediatised and its role in the construction of a positive image of the city is recognised and hailed by the public. At a strategic level, the Festival enhances tourism objectives (Vision 2010 and Vision 2020), which include promoting Fes as a cultural destination.
- There is no question that for the majority of the inhabitants of Fes, even those who are critical of the Festival or do not have access to the “in” activities, it is a real source of pride. In fact, it is taking place in a city that has witnessed an industrial decline during the 80s and that is looking to reinvent itself through the development of cultural tourism. The city of Fes, with its Medina, an emblem and an asset for its heritage and culture, and in spite of the scarcity of its infrastructures and cultural activities, has managed, through the Festival, to reconcile itself with its historic identity as a cultural and spiritual capital.
- Only an evaluation could measure the efficacy, efficiency, pertinence and sustainability of the Festival, and its conformity with environmental requirements.

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6.2 LIST OF INTERVIEWS

- Mr El Hachmiui, Executive Officer, Regional Tourism Delegation, 7 January 2014
- Mr M. Bakkali, Head of Statistics, Regional Tourism Delegation, 8 January 2014
- Mr. O. Lebbar, Director of Maison d'hôtes and former President of the Association of Guest Houses of Fes, January 8, 2015
- Mr. M. Wazani, SG of the Fes Festival of World Sacred Music, Thursday, January 8th.
- Mrs. M. Roland Gosselin, former head of logistics of the Festival - 2009/2010.
- M.H. Anbassi, Fes Festival of World Sacred Music, Friday, January 9th.
- D. Faceh, President of the Regional Tourism Center, Head of ticketing - Fes Festival of World Sacred Music, Friday, January 9th.
- Ms. C.Biehn, owner of the Riad Jardin des Biehn, December 23, 2014.
- Ms. E. Sculier, owner of Dar El Bali, January 15, 2015
- Mr. P. Laleu, Director of the French Institute, 23 December 2014
- Ms. Z. Lemrabet, Ex Festival Manager in the City of Fez, December 3, 2014

6.3 EXTRACT FROM HANDBOOK NO. 1, UNESCO

- UNESCO, UNESCO Institute for Statistics, Handbook No. 1 of the UNESCO Framework for Cultural Statistics, 2009 - Measuring the economic contribution of cultural industries - Review and evaluation of current methodological approaches. Extract, p. 26 of Handbook No. 1
- 2.3. Analysis of the Multiplier. {...} Economic impact studies in the cultural sector are very often conducted for thematic areas or cover one cultural domain (e.g. cultural heritage, performing arts, etc.), different territory levels (e.g. local communities, regions or city) or single events (e.g. festival, art manifestation, project, etc.). There are different views about the analytical and economic purpose of impact studies in culture. Madden (2001:167) considers "that multipliers are designed only to measure the impact on GDP, increase in demand, increases caused by exogenous increases in wealth (e.g. money from outside the economic system)"; while Throsby considers impact studies "as a tool constructed to discern the short-term effects of specific projects and essentially to measure the effects of direct expenditures" (Cultural Policy Center, 2004:44). Different levels of industry aggregation and data resources, however,

have cast doubt on this approach, and it has come under extensive criticism. Most of the discussion has been focused on the quantification of technical coefficients, and on distinguishing those parts of the economy that produce for cultural industries from those that do not. For example, Seaman (2003) points out several weaknesses concerning technical aspects of economic impact studies, such as: direct base errors, errors in calculating induced effects, errors connected with assumptions about the capacity of local areas, policy interpretation errors, etc. The second dilemma that arises is knowing when multiplier analysis should be conducted at the regional, local or city level. The localisation of production at different territory levels requires different techniques for measuring the involvement of cultural industries in the regional economy (Listokin et al., 2010).