The Aurèsi Archaeological Mosaic: a Precious Heritage for a Promising Prosperous Economy

الفسيفساء الأثرية بمنطقة الأوراس: تراث ثمين لبعث اقتصاد مزدهر و واعد

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Abstract
The paper aims at shedding light on the archaeological heritage that the Aurès region owns and the importance of tourism in the region to enhance the Algerian economy. The Aurès region enjoys scenic views and beautiful archaeological sites dating back to ancient civilizations and early history. These sites are Hammam Salhin, balconies of Ghoufi, the Temple of Minerva, Medracen, Tazoult 'Lambaesis', and Timgad which won an Outstanding Universal Value as one of the seven World Heritage Sites located in Algeria. The conduct of archaeological excavations almost continually since 1881 to 1960 has enabled the city of Timgad to avoid the construction of recent buildings, as the mechanical means required would have disturbed the ancient vestiges. The archaeological sites in the Aurès region have cultural and historic endowments that make it the perfect tourism destination. Diversifying oil dependent economy in Algeria is a must, especially with the slump in global oil prices. Consequently, one of the best alternatives is the effective development of tourism business. However, Considerable attention must be devoted by both Ministries of Culture and Tourism for a vigorous involvement to strengthen the tourism sector and to revive tourism in the Aurès region.

Keywords: Algeria; Aurès; Archaeology; history; economy; culture; tourism.
Introduction

To be believed, the Aurès mountains are a real highlight of Algeria, not just the east, offering a chance to enjoy stunning archaeological sites. Aurès is a beautiful and varied region which hosts the most intact Roman ruins in the country. Visiting these places sheds a lot of light on the history of Aurès. Monuments and sites scattered all over the country are vestiges of past civilizations; such civilizations date back several thousand-years and left numerous traces of prehistoric life. With dropping oil prices, the necessity of Algeria to diversify its economy has become more than necessary.

The decline in oil prices has significant implications in Algeria. Sharply lower oil prices will weaken fiscal and external positions and reduce economic activity. This could be abrupt in some cases. However, declining oil prices also will present a significant window of opportunity to reform fuel subsidies, which are substantial in Algeria as developing countries, and energy taxes, and to reinvigorate reforms to diversify oil-reliant economies. Importantly, the authorities are aware of the economic challenges that lie ahead and are technically prepared to deal with them. This would imply a need for diversifying the economy and enhancing the touristic sector which may be considered among the best alternatives to revive the economy.

In this context, Francesco Bandarin, director of World Heritage Centre in France, states that “tourism is an important management issue at both natural and cultural world heritage sites. It is an industry with well-known costs but also with the potential efforts, engaging and taking appropriate actions at the different levels of the sustainable tourism process, tourism can be managed to generate net site benefits” (qtd. in Pedersen 3). The archaeological heritage of Aurès region offers exceptional assets that may constitute a significant contribution to the national economy. Besides, the Roman civilization is still alive in the Aurès region where complete cities are witnessing its greatness. The archaeological sites reflect the wealth and creativity of civilizations that had settled in the Aurès region thousands of years ago but that, unfortunately, did not contribute to enhance the culture of tourism which is extremely beneficial to the region and to the country as well. The paper is inclined to provide answers to the following questions: what are the risks of oil price volatility in Algeria, what are the touristic potentialities in Algeria, and what are the challenges to Algeria’s tourism?

1. Fascinating Ruins and Vestiges in the Aurès Region

Aurès is an Amazigh language-speaking region located in the eastern part of Algeria. The region hosts the most interact roman ruins landscape in Algeria and some of the greatest in Africa, though possibly the least well known to the outside world. Protected areas, particularly world heritage sites, are some of tourism’s main attractions, and are subject to growing visitation. Heritage sites and vestiges are outstanding cultural and natural landscapes spreading around the region. The potential economic benefits that tourism can bring are huge.

1.1. Hammam Essalihine

This wonder of nature that is, Hammam Essalihine (Aquae Flavianae), is an ancient Roman Bath situated in the Aurès Mountains in the El Hamma District in Khenchela Province of Algeria. It is a source to exploit warm and cold groundwater As the Latin name suggests, it dates from the time of the Flavian Dynasty. Based on the inscriptions discovered this compound had been built or re-exploited in the Filavianah period during the reign of Emperor Flavian. Stones had been used to build this architectural masterpiece. It consists of a variety of pools, including: the rectangular pool, its length 14 m, its width 10m and its depth is 1 m and 45 cm.

It is surrounded by columns. The circular pool, its diameter is 8 m and its depth is 1m and 45 cm. It was covered with a dome. Also Hammam Essalihine has three rooms which contain four pools. Indeed, Hammam salhin has a high importance to heal and cure many diseases because of its hot mineral water coming out of the ground; it had been the center for rest and recreation for many kings and leaders of the Roman armies.
1.2. Ghoufi Balconies

Ghoufi or Ghoufi canyon is a tourist attraction in the Aurès region of Algeria. The village of Ghoufi is a secondary agglomeration of the commune of Ghassira in the wilaya of Batna. Carved into rock in the form of cascades, the balconies of Ghoufi had attracted men to build houses in them. These houses go back to four centuries and are deserted in nowadays. At the turn of each balcony, there is a village in the middle of which stands a Taqliath, World Heritage Encyclopedia documents that, “a multi-storey building containing a number of rooms equal to the number of families; which serves as warehouses for crops and supplies.” The villages clinging to the cliff are named: Hitelsa, Idharène, AthMimoune, AthYahia, Ath Mansour or Taouriret.

The architecture of the place is a typical Tamazight architecture. The materials consist of stones that are polished and briefly joined with local mortar trunks of trees and date palms.

The Canyon Ghoufi is a breath taking site located in the Aurès region. The Canyons of Ghoufi are some of the most beautiful in the world and is one of the wonders of nature in Algeria. Ghoufi is registered in the register of protected natural sites by UNESCO, particularly due to the presence of “Ghoufi Balcony”, an old archaeological site of four centuries. These rocky formations are like a true century old citadel that is stretching from Batna to Biskra. They are an unforgettable site overlooking the oasis. Cut in the rocks, these natural balconies have attracted people in ancient times for its mild climate and protection. The first dwellers of these fascinating formations built their homes into the rocks that remained a silent witness to the unique history of the region during war and peace time. They resemble more to summer retreat houses because of its surroundings with river banks and palms.

1.3. The Temple of Minerva

The ancient city of Tébessa is the capital city of the Algerian province of the same name and is situated about 20 kilometers from the Tunisian border. The city is home to more than 160,000 people and is famous for the manufacture of traditional Algerian carpets. Tébessa has a long and diverse history with many interesting sights for visitors to explore.

Tébessa started off as a town of Numidia, an ancient North African Berber kingdom. In the 7th century BC it became an outpost of Carthage and by 146 CE it had become part of the Roman Empire, becoming known by the name of Theveste. The flourishing city with an estimated 30,000 inhabitants was given the designation of collonia during the rule of Roman Emperor Trajan. Under the Ottoman Empire, which reached the zenith of its power in the 16th and 17th centuries, Theveste was home to a garrison of Janizaries, infantry units of the sultan’s household bodyguard troops. In 1851 the city was occupied by the French and was given the current name of Tébessa.

In and around Tébessa are many monuments and remains of ancient buildings relating to the city’s past. The Gate of Caracalla is a Roman triumphal arch dating back to 214 CE. Free standing, ornately decorated triumphal arches were erected as a monument to celebrate a victory in war or in honor of their leader at the time of the victory.

The richly mosaic decorated Temple of Minerva in Tébessa dates back to the early part of the 3rd century CE. The remains of the basilica of St. Crispinus, complete with chapels, baptismal urns, gardens and catacombs, dates back to the 4th century CE. Sixth century Byzantine walls, which are referred to as “Solomon’s Walls”, are flanked by thirteen impressive square towers. Other places of interest include a Roman theater, an archaeological museum and an amphitheater from the 4th century CE.

Visitors to Algeria can easily include Tébessa in their itinerary as it is conveniently connected by road and rail to other parts of Algeria as well as neighboring Tunisia. Tourists are sure to spend many pleasurable hours exploring the historical treasures that this interesting Algerian city has to offer.

1.4. Medracen

Medracen around 34km before Batna, coming from Constantine, you should take the road to khenchela and 5km down that road you will find Medracen.
This Tomb of the Numidian Kings is the largest pre-Roman building in North Africa and the oldest Numidian building still standing. It stands 58m in diameter and 19m tall with 60 columns around the outside. The tomb is thought to be for the Berber kings, however, as yet no bodies have been found in the tomb. It is slightly smaller than the Tomb of the Christian in Tipasa but is remarkably similar.

It is believed that the tomb is from the 4th century BC. As of May 2007 the site was closed to visitors while restoration work took place, however, you are free to walk around perimeter fence, from where you still get a good view and can admire the structure from a distance. The surrounding countryside is verdant yet the busy main road running next to it does detract a little. As you approach over the flat farmland, something vast and cone-topped appears over the horizon which you would be forgiven for thinking is a hill. It is, instead, a mausoleum and one of Algeria’s many archaeological mysteries.

The mausoleum is 18.5m high and 59m in diameter, and composed of a vast number of cut stones laid over a rubble core. It is an imposing construction, a circular base with a conical roof. It was built out of massive stone blocks, the base decorated with 60 columns topped with Doric capitals. It was obviously intended as a royal burial place: there is a false door and a real, hidden entrance that leads via steps to a corridor and then a Cedar wood door to the empty burial chamber beyond. Now for the mystery: it was long assumed this was the burial place of Micipsa, son of the great Numidian king of Massyli, who died around 119 BC. But carbon dating suggests that it was built earlier, perhaps before the 4th century BC, though for whom it is not known. Whenever it was constructed, the mausoleum is evidence of a sophisticated people, influenced by Berbers and Libyans, Carthaginians and Greeks, and who knew how to cut and manipulate massive stones with great accuracy.

1.5. Tazoult “Lambaesis”

Tazoult “Lambaesis”, in the modern village of Tazoult, more commonly referred to under its colonial name of Lambese, is the Roman city of Lambaesis only 11km from Batna and just off the main road to Timgad. The site was founded in the 1st century AD by Romans from Tébessa who were fighting the Numidians at the time. Like Batna it was largely a military camp and was built on the orders of Emperor Marc-Aurèle but was to become the capital of Roman Africa.

The city therefore was of much more importance than Timgad. The French built their colonial village on the very site of the Roman city and a number of edifices were destroyed. Much of the site has not been excavated and the sights are located a few kilometers apart but what is going to be seen is certainly worth making the detour. The site is quite large and there is certainly more to see than initial impressions suggest.

It is among the most interesting and perhaps lesser-known ruins in northern Africa, situated next to the modern village of Tazoult. Similarly to Timgad, it is located in the Aurès Mountains and is also home to arches, baths and even aqueducts. However, this garrison town is well worth a visit for the gem that is the praetorian of the Third Augustan Legion alone. This commandant’s house dates from around 268 and dominates the site of the modern day ruins of Lambaesis, it was once the capital of the dominant building in the Camp of Hadrian, which remains in remarkable condition.

Nearby you find the foundations of the soldiers’ houses, the storehouses, the stables and the large bath complex. Just outside the gated area are the large amphitheatre and the Arch of Commode. Further up the hill past Tazoult village itself is the site of the city of Marc-Aurèle. Here you will find the large Temple of Esculape and the capitol plus the remains of three smaller temples. The site is surrounded by farms and cedar forests. Lambaesis is one of the most imposing legionary camps in the whole of North Africa.

1.6. Timgad

At 35km to the east of Batna is the modern town of Timgad which houses the ruins of Roman city of Thamugadi. This is without doubt one of the most beautiful touristic places in Algeria and the place gets swamped with day trippers school kids...
at weekends. Timgad lies on the northern slopes of the Aurès Mountains and was created as a military colony by the Emperor Trajan in A.D. 100. With its square enclosure and orthogonal design based on the “cardo” and “decumanus”, the two perpendicular routes running through the city, it is an excellent example of Roman town planning.

Timgad, located to the north of the massif of the Aurès in a mountainous site of great beauty, 480 km south-east of Algiers and 110 km to the south of Constantine, is a consummate example of a Roman military colony created ex nihilo. The Colonia Marciana Traiana Thamugadi was founded in 100 A.D. by Trajan, probably as an encampment for the 3rd Augustan Legion which, thereafter, was quartered at Lambaesis. Its plan, laid out with great precision, illustrates Roman urban planning at its height. By the middle of the 2nd century, the rapid growth of the city had ruptured the narrow confines of its original foundation. Timgad spread beyond the perimeters of its ramparts and several major public buildings are built in the new quarters: Capitolium, temples, markets and baths. Most of these buildings date from the Severan period when the city enjoyed its Golden Age, also attested by immense private residences.

A strong and prosperous colony, Timgad must have served as a compelling image of the grandeur of Rome on Numidian soil. Buildings, constructed entirely of stone, were frequently restored during the course of the Empire: the Trajan Arch in the middle of the 2nd century, the Eastern gate in 146, and the Western gate under Marcus-Aurelius. The streets were paved with large rectangular limestone slabs and, as attested by the 14 baths which still may be seen today, particular attention was paid to the disposition of public conveniences. The houses, of varying sizes, dazzle by their sumptuous mosaics, which were intended to offset the absence of precious marbles.

During the Christian period, Timgad was a renowned bishopric. After the Vandal invasion of 430, Timgad was destroyed at the end of the 5th century by montagnards of the Aurès. The Byzantine Reconquest revived some activities in the city, defended by a fortress built to the south, in 539, reusing blocks removed from Roman monuments. The Arab invasion brought about the final ruin of Thamugadi which ceased to be inhabited after the 8th century.

1.7. Protection Management Requirements

The Archaeological site of Timgad is governed by a Protection and Presentation Plan, a legal and technical instrument establishing the conservation and management actions at the property. The body managing the property is the Office of Cultural Properties Management and Exploitation. It executes all activities concerning the protection, maintenance, documenting and development of programs for presentation and promotion. The implements its protection and management program for the site in cooperation with the Cultural Directorate of the Wilaya “province” that has a service responsible for cultural heritage.

The legal and management framework comprises Laws 90-30 “regional law”, 98-04 “relating to the protection of cultural heritage”, 90-29 “relating to town-planning and development”, and the Master Plan for Development and Town-Planning of the Timgad community, 1998. Nevertheless, the State Party considers that there is a need to revise the legal and administrative provisions concerning the property to better ensure its conservation and presentation. There is a need to examine the increasing impact of the insufficient regulation of visitor numbers and vehicles affecting the fragile structures and their surrounds.

2. The Algerian Economy

Algeria remains, as it has been for the past fifty years, overwhelmingly dependant on the hydrocarbon sector. The sector accounts for 97% of total exports, 63% of government fiscal revenues and 37% of the GDP. As indicated by Ghilès, in such circumstances it seems unlikely the government can continue with expansionary budgets. Algeria may well have four and a half times the country’s reserves in conventional oil and gas lying beneath the ground in the form of shale oil and gas resources. Between 2003 and
2013, total energy demand grew at an annual rate of 4.1% while supply declined by 0.8%. Exports took the brunt, contracting by 2.6% every year which led to growing concerns over depletion of oil and gas reserves.

Algeria is among the top three oil producers in Africa, with considerable reserves and production upside potential. It is a member of OPEC, which theoretically restricts its ability to expand output. The country is also an important supplier of gas to Europe, both via pipeline and in the form of liquefied natural gas. It hopes to increase its crude oil production capacity significantly over the next few years by attracting more foreign investment. However, gross natural gas and crude oil production have gradually declined in recent years, mainly because new production and infrastructure projects have repeatedly been delayed.

The country has struggled to develop industries outside of hydrocarbons in part because of high costs and an inert state bureaucracy. The government’s efforts to diversify the economy by attracting foreign and domestic investment outside the energy sector have done little to reduce the total dependency on oil industry. In 2013, Algeria has allocated a budget of 55.25 Billion Dollars. Long-term economic challenges include diversification from hydrocarbons, relaxing state control of the economy, and providing adequate jobs for younger Algerians.

2.1. The Risks of Oil Price Volatility in Algeria

The economy is vulnerable to changes in oil prices, as hydrocarbons account for over 30% of GDP and 98% of export earnings. Recent government policy will discourage foreign investment, undermining economic diversification. The banking sector remains small and disconnected from the global financial system. Credit growth will be high, but funding will be directed to government-related enterprises, as banks will finance the state’s spending program. Algeria’s public debt stock and debt-servicing obligations are very low, and the government has a large stabilization fund. A high dependency on oil income leaves the government at risk of a price collapse. Spending is often increased ad hoc to meet social pressures.

The 50 percent fall in oil prices over the last year is beginning to have a serious impact across the world. Rig rates are down in the US and production of tight oil produced through fracking is beginning to fall. Corporate profits and share prices are down. The private sector generally, however, is remarkably resilient. Costs can be cut, new projects postponed and if things get worse dividends can be reduced. By contrast many of the countries that have come to depend on high prices have little room for adjustment. A few, like Saudi Arabia, still hold vast cash reserves and can tolerate the loss of revenue for several years. Others are trapped and particularly vulnerable because the lack of income compounds all the other problems they face. One of the most vulnerable is Algeria.

Hydrocarbons wealth has underwritten Algeria’s growth for decades, allowing the country to accumulate huge foreign currency reserves and underwrite a major public spending campaign over the past 10 years. Thanks to high oil and gas prices, the government has been able to fund infrastructure and social programs, including subsidies, helping the country sidestep the regional unrest of recent years. However, the dramatic drop in oil prices since mid-2014 has had an impact. Despite GDP growth of 4% in 2014, Algeria also experienced its first current account deficit since the late 1990s, equivalent to 18% of its GDP. The government will offer concessions to avert widespread political unrest.

3. The Touristic Potentialities in Algeria

Algeria has huge tourist potentialities and occupies a special place on the world tourist market. It is considered a crossroads of three worlds Mediterranean, Muslim and African, home of the art and civilization. Algeria claims a territorial sea of 12 nautical miles and an exclusive fishing zone of 32-52 nautical miles. Its 998 kilometer northern border stretches along the southern edge of the Mediterranean Sea from Morocco in the west to Tunisia in the east. Algeria is the largest country in Africa, with 5500 km of complicated borders with Morocco “1500 km”, Tunisia “1000 km”, Libya
“1000 km”, Mali “1400 km”, Niger “1000 km”, and Mauritania “500 km”. It holds a strategic position in the Western Mediterranean (qtd. in Escribano 15)

Library of Congress Research Division documents that diversified topography characterized the country. The fertile Tell region in the north, extending eastward from the Moroccan border, is the country’s heartland, containing most of its cities and population. The Tell is made up of the hills and plains of the narrow coastal region, several Tell Atlas mountain ranges, and intermediate valleys and basins. South of the Tell, the High Plateaus region stretches more than 600 kilometers eastward from the Moroccan border. This region consists of undulating, steppe-like plains lying between the Tell Atlas Mountains to the north and the Saharan Atlas Mountains to the south.

The coastal lowlands and mountain valleys are characterized by a Mediterranean climate, mild winters, and moderate rainfall. In this region, temperatures average 21 to 24 Celsius in the summer and drop to10 to 12 Celsius in the winter. Average temperatures and precipitation are lower in the intermountain High Plateaus region. The desert is hot and arid. Most of the country experiences little seasonal change but considerable diurnal variation in temperature. Rainfall is fairly abundant along the coastal part of the Tell, ranging from 400 to 670 millimeters annually, with the amount of precipitation increasing from west to east. Precipitation is heaviest in the northern part of eastern Algeria, where it reaches as much as 1000 millimeters in some years.

The semi arid climate in the region of the High Plateaus, a continental type, is characterized by a long and cold season which sometimes is humid from October to May where we can record temperatures nearing 0 degree. The rest of the year prevails a hot and a dry season with temperatures above 30 degrees. The arid climate spreads to the regions of the Big South: the cities and oasis of these regions go through long periods of heat from May to September, where the temperature reaches sometimes 40 to 45 degrees. The remaining months of the year, the climate is very soft with however night temperatures nearing 0 degree. The limpidity of the air during the winter in these regions enables a very good visibility to admire the panoramas and the landscapes.

Algeria is a land of welcome, meetings and exchanges. It presents a number of various regions and very distinctive by their natural environment, history and their civilizational appearance. Besides a littoral composed of creeks with a fine sand, in particular the regions of: the Kabylie, the Oasis, the M’Zab, the Saoura, the Hoggar, Tassili, and of course the fascinating region of the Aures which conceal great invaluable assets.

3.1. Challenges to Algeria’s Tourism

According to the Travel and Tourism Council, in 2015 Algeria only ranks at the 132nd place out of 140 countries in terms of travel and tourism competitiveness. Visitors are drawn to Algeria by the natural beauty, rich culture, fascinating history and warm hospitality offered by this North African country, and Algeria is becoming increasingly popular as an international tourist destination. With the knowledge that tourism has the potential to contribute significantly on an ongoing basis to the economy of Algeria, authorities place emphasis on the development of the country’s infrastructure and tourism facilities.

For decades, the Algerian government ignored Algeria’s attractions, as the economy was tremendously dependent of the oil and gas sector alone. Today, Algeria’s business environment is more conducive to tourism growth and the government is finally launching projects to develop tourism. Because of the oil curse, Algeria, like many other oil dependent countries, has not developed a vibrant and competitive private sector. As a consequence, today, Algeria is lacking supporting industries for tourism to develop effectively.

The main challenge to the country’s tourism sector is insecurity, characterized by instability and constant threat of violence. Whereas the country is generally peaceful and safe, certain areas are still susceptible to Islamic extremists groups. Terrorism still takes on a high media profile. Renewed violence and increasing presence of Islamic State and Algeria’s
role in Libya add further pressure on the government and to the crisis facing the country’s vital tourism sector. The national government however has moved swiftly to assure all tourists of maximum protection throughout the country.

Despite the fact that tourism in Algeria still contributes a paltry 1% of the country’s Gross Domestic Product, the country has paved way to reach new heights in its tourism sector. The first approach was the establishment of a National Tourism Development Plan “Schema Directeur d’Amenagement Touristique” in 2008 whose main aim is to increase the sector revenue. Under the same plan international tourist arrivals are expected to rise to 3.1 million by 2023.

It is worth noting that Algeria sits on tremendous tourism potential, comprising of rich and diversified natural resources and historic sites, which to date are yet to be largely realized. However, the country is planning to make the sector a motor for development and an active actor in diversifying the economy. Some of the identified potential tourist destinations include the mountains, spectacular deserts and the long Mediterranean coastline.

According to World Tourism Organization, a specialized agency of the United Nations that serves as a global forum for tourism-related issues Algeria has stepped up their total travel and tourism operating expenditure. It is anticipated that, by the year 2017, 1.1 percent of total government spending in Algeria will be devoted to the development of tourism. This is good news for tourists who decide to make Algeria their holiday destination. Algeria offers a remarkable variety of opportunities for tourists such as Seaside tourism; Saharan tourism; Cultural tourism and Mountain tourism in which tourists may enjoy fascinating mountains especially the Aurès which is the home of beautiful archaeological sites.

Conclusion

The severe fall of international oil prices, to less than half their original value, since mid-2014 have imposed strong pressures on Algeria’s economy, which is based mainly on oil and natural gas. This has pushed the government, over the past months, to adopt two main policies: the first involves taking austere measures in regards to government spending, while the second focuses varying economic activities. This is especially important as the Algerian economy has suffered for decades from weak competitive abilities, which makes the process of economic diversification face many difficulties, as it requires long-term, large scale reforms.

Tourism is among the best substitutes to overcome the oil crisis and to recover the Algerian economy. The country is rich in prehistoric memorials of human occupation, especially in megalithic remains, of which nearly every known kind has been found in the country. As a melting pot of cultural influences, Algeria holds beautiful archaeological sites throughout its vast lands. The Aurès region hosts fascinating archaeological mosaic and attractive roman ruins and vestiges.

Historical and archaeological sites in Aurès have to serve as attraction points for tourism. Although a relatively limited number of Algerians go abroad for their vacation periods, potential still remains to be explored in the domestic tourism segment and to attract foreign tourists. Algerian tourists travel overseas because they are offered the best service that’s why accommodation centers and hotels must be provided in Aurès region. Also human resources’ improvements and skills to increase quality of service have become a priority to set up a strategy for tourism development.

Tourism’s impact on the economic and social development of Algeria can be enormous; opening it up for business, trade and capital investment, creating jobs and entrepreneurialism for the workforce and protecting heritage and cultural values. Ancient landmarks of Timgad, Madrecen and Tazoult have become isolated places without the spirit to restore historical value and to enhance cultural significance. Any tourist who visits those fascinating archaeological sites must be captivated by the magic of the place. The role of tourism in Aurès region is paramount in the economic sector, although much more importance must be given to the maintenance and promotion of the archaeological
sites. But for this plan to be successful, public policy and government decision-making on the sector will need to move faster than it has done so far.

References


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