Initial report on the achievement of the Sustainable Development Goals in the Maghreb
Initial report on the achievement of the Sustainable Development Goals in the Maghreb
To order copies of *Initial report on the achievement of the Sustainable Development Goals in the Maghreb* please contact:

Publications Section
Economic Commission for Africa
Menelik II Avenue
P.O. Box 3001
Addis Ababa, Ethiopia

Tel: +251 11 544-9900
Fax: +251 11 551-4416
E-mail: ecainfo@uneca.org
Web: www.uneca.org

© 2020 Economic Commission for Africa
Addis Ababa, Ethiopia
All rights reserved
First printing February 2020
Material in this publication may be freely quoted or reprinted. Acknowledgement is requested, together with a copy of the publication.

Designed and printed by the ECA Printing and Publishing Unit. ISO 14001:2015 certified.
Cover photos: © Shutterstock.com
# Table of Content

Acronyms ........................................................................................................................................... v

Introduction ......................................................................................................................................... vi

Executive summary ............................................................................................................................. viii

General introduction ............................................................................................................................ 1
  1. Regional and global context ............................................................................................................. 1
  2. Aim and scope of the report ........................................................................................................... 2
  3. Methodology and limitations .......................................................................................................... 3
  4. Indicator framework used in the thematic analysis ......................................................................... 5

Chapitre 1: National approaches to strategic planning, steering, financing and follow-up with a view to achieving the Sustainable Development Goals ............... 6

Chapitre 2: Thematic analysis ............................................................................................................ 16
  2.1 Extent to which the Sustainable Development Goals have been integrated into sectoral policies ........................................................................................................ 16
  2.2 Analysis of progress achieved and emerging trends in each thematic area ................................ 18

Chapitre 3: Regional cooperation to achieve the Sustainable Development Goals .................................. 59
  3.1 Intra-Maghreb cooperation: largely unexploited trade opportunities ... 60
  3.2 Well-defined subregional priorities but no elaboration of strategic frameworks ....................... 62
  3.3 Role of AMU in implementing the 2030 Agenda and Agenda 2063 and the intervention framework ................................................................. 68

Annex .............................................................................................................................................. 75

Bibliography ...................................................................................................................................... 79
**Acronyms**

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMU</td>
<td>Arab Maghreb Union</td>
</tr>
<tr>
<td>ANAPEC</td>
<td>Agence nationale de promotion de l’emploi et des compétences</td>
</tr>
<tr>
<td>ANAPEJ</td>
<td>Agence nationale pour la promotion de l’emploi des jeunes</td>
</tr>
<tr>
<td>ANETI</td>
<td>Agence nationale pour l’emploi et le travail indépendant</td>
</tr>
<tr>
<td>ANSEJ</td>
<td>Agence nationale de soutien à l’emploi des jeunes en Algérie</td>
</tr>
<tr>
<td>AOAD</td>
<td>Arab Organization for Agricultural Development</td>
</tr>
<tr>
<td>APRUE</td>
<td>Agence Nationale pour la Promotion et la Rationalisation de l’Utilisation de l’Energie</td>
</tr>
<tr>
<td>CO2</td>
<td>Carbon dioxide</td>
</tr>
<tr>
<td>COMESA</td>
<td>Common Market for Eastern and Southern Africa</td>
</tr>
<tr>
<td>ECA</td>
<td>Economic Commission for Africa</td>
</tr>
<tr>
<td>ECOWAS</td>
<td>Economic Community of West African States</td>
</tr>
<tr>
<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
</tr>
<tr>
<td>FDI</td>
<td>Foreign direct investment</td>
</tr>
<tr>
<td>FIES</td>
<td>Food Insecurity Experience Scale</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross domestic product</td>
</tr>
<tr>
<td>GWh</td>
<td>Gigawatt-hour</td>
</tr>
<tr>
<td>ha</td>
<td>Hectare</td>
</tr>
<tr>
<td>IFMEREE</td>
<td>Instituts de formation aux métiers des énergies renouvelables et de l’efficacité énergétique</td>
</tr>
<tr>
<td>ILO</td>
<td>International Labour Organization</td>
</tr>
<tr>
<td>IRESEN</td>
<td>Institut de recherche en énergie solaire et en énergies nouvelles</td>
</tr>
<tr>
<td>ISO</td>
<td>International Organization for Standardization</td>
</tr>
<tr>
<td>kW</td>
<td>Kilowatt</td>
</tr>
<tr>
<td>MTOE</td>
<td>Million tons of oil equivalent</td>
</tr>
<tr>
<td>MW</td>
<td>Megawatt</td>
</tr>
<tr>
<td>MWp</td>
<td>Megawatt peak</td>
</tr>
<tr>
<td>OECD</td>
<td>Organization for Economic Cooperation and Development</td>
</tr>
<tr>
<td>OHSAS</td>
<td>Occupational Health and Safety Assessment Series</td>
</tr>
<tr>
<td>OMVS</td>
<td>Organization for the Development of the Senegal River</td>
</tr>
<tr>
<td>RISE</td>
<td>Regulatory Indicators for Sustainable Energy</td>
</tr>
<tr>
<td>SOMELEC</td>
<td>Société Mauritanienne d’Electricité</td>
</tr>
<tr>
<td>UNDP</td>
<td>United Nations Development Programme</td>
</tr>
<tr>
<td>UNESCO</td>
<td>United Nations Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>UNICEF</td>
<td>United Nations Children’s Fund</td>
</tr>
<tr>
<td>WFP</td>
<td>World Food Programme</td>
</tr>
</tbody>
</table>
Introduction

The 17 Sustainable Development Goals, which were adopted in September 2015 by 193 Member States of the United Nations, including the Maghreb countries, have become the world’s key development framework. Through its achievement of the Sustainable Development Goals, the international community aims, by 2030, to eliminate all forms of poverty and inequality, ensuring that no one is left behind, to guarantee the well-being of populations, to protect our planet and to promote partnerships, peace and prosperity.

It is clear that, given the broad scope of the Sustainable Development Goals and the complexity of the challenges that must be addressed to ensure that the Goals are successfully achieved, all States must adopt and implement integrated and coherent policies and take stock of lessons learned. Furthermore, to achieve the Goals, States must adopt innovative governance mechanisms that promote ownership, strong partnerships and a sense of shared responsibility among developmental actors at all levels, with a view to implementing transformative initiatives that benefit all members of society.

Although more than three years have passed since the adoption of the 2030 Agenda for Sustainable Development, ensuring the achievement of the Goals remains a major challenge, and much remains to be done if States are to build societies that are resilient and sustainable. While much progress has been made on multiple fronts, socioeconomic inequality persists in many areas, as evidenced by the exclusion of young people and women from the job market (indeed, almost one-third of North African young people are unemployed), gender-based inequality, the marginalization of certain areas and territories, food insecurity, and inequitable access to basic services, including education, health care and social protection. The situation is further compounded by the fact that the economies of the Maghreb countries remain insufficiently diversified and uncompetitive, which severely hampers those countries’ capacity to sustain growth rates that can support sustainable job creation and inclusive development.

On the environmental front, ecosystems are under increasing pressure, water stress is an increasingly significant factor, and the impact of climate change is becoming ever more apparent, with some 80 to 90 per cent of Maghreb States’ national territories threatened by desertification.

Faced with such challenges, our countries have yet to develop national and regional coordination mechanisms to facilitate the achievement of the Sustainable Development Goals. By taking coordinated action, the Maghreb countries could more effectively address shared challenges, such as youth and women’s unemployment and insufficient economic diversification. To that end, those countries should take steps to harmonize their policies and regulations, boost intra-regional trade and facilitate the development of cross-border infrastructure, in particular in the area of energy.

This report was prepared by the Subregional Office for North Africa, in collaboration with the Arab Maghreb Union (AMU), two years after the launch of the 2030 Agenda for Sustainable Development. The report provides an initial assessment of the progress made by four Maghreb countries, namely Algeria, Mauritania,
Morocco and Tunisia, towards the achievement of the Goals and their efforts to monitor progress to that end. In particular, it analyses the efforts made in the areas of ownership and contextualization, as well as institutional governance and follow-up. It also highlights six thematic areas of particular importance for those countries that are critical to regional integration efforts, namely food security (Goal 2), energy transition (Goal 7), youth and women’s employment (Goal 8), industrialization (Goal 9), climate change (Goal 13) and desertification (Goal 15). The report also discusses how regional cooperation can accelerate the achievement of the Goals, and provides recommendations on how AMU can more effectively support the achievement of the Goals in its member countries. Finally, the report proposes recommendations for Maghreb countries to accelerate their implementation of the 2030 Agenda.

The report also seeks to encourage stakeholders to consider where further action is required in North Africa, including with a view to enhancing institutional governance and the engagement of civil society and the private sector, mainstreaming the Goals into public policies, strengthening budgeting and resource mobilization mechanisms, improving the quality of relevant indicators and data, and bolstering employment and food security.

The report also highlights the need for North Africa as a whole to sustain its efforts to raise awareness of the Goals, to enhance synergies and policy coherence, to accelerate the mainstreaming of the Goals into national strategies, to put in place an institutional mechanism for coordinating action to achieve the Goals in countries where this has not yet been done, and to enhance statistical data production in order to strengthen the ability of Maghreb countries to select the most effective policies to achieve their objectives. The report also stresses the need for national and local ownership of the Goals, and the engagement of all relevant stakeholders, including sectoral departments, the private sector, local communities and civil society.

The report was prepared in the light of the mandate of the United Nations regional economic commissions to monitor implementation of the 2030 Agenda, review regional perspectives in that regard and strengthen regional integration.

The report provides as detailed an overview as possible of progress so far achieved in the light of challenges related to the availability and reliability of countries’ national data. It has been compiled with a view to sharing lessons learned and best practices among Maghreb countries, which face a number of similar challenges, and supporting African efforts to monitor progress towards the achievement of the 2030 Agenda, as called for by the Africa Regional Forum on Sustainable Development. The report was presented and discussed at a subregional meeting on the implementation of the Sustainable Development Goals, which was convened by the ECA Subregional Office for North Africa in June 2018.

Lilia Hachem Naas
Director
Subregional Office for North Africa
Economic Commission for Africa
Executive summary

The process to promote national ownership of the Goals and to mainstream into planning and budgeting frameworks is taking place at different speeds across countries but, overall, remains too slow.

With the exception of Mauritania, the other three countries considered in this report still need to give priority attention to the achievement of the Goals and to establish relevant national targets and indicators to that end. Although all the countries have developed national strategies for sustainable development, only Morocco could potentially make its strategy the reference instrument for the achievement of the Goals, as has been done by certain European countries, including Germany and Switzerland. Initiatives by Mauritania to achieve the Goals are based on its 2016-2030 strategy for accelerated growth and shared prosperity, while Algeria and Tunisia are basing their efforts on their medium-term national development plans. Progress achieved in terms of integrating the Goals into sectoral and local policies varies across countries and sectors.

In Algeria, the 2016-2030 new economic growth model, adopted in July 2016, does not explicitly refer to the 2030 Agenda, but incorporates many Sustainable Development Goal-related issues. The same is true for the country’s 2015-2019 five-year programme. The new 2018-2035 national strategy for the environment and sustainable development, the adoption of which is pending, addresses 14 of the 17 Goals. Work is under way to align the Goals with sectoral strategies, under the aegis of Sustainable Development Goal thematic groups and the intersectoral Sustainable Development Goal coordination committee. A review of the Government’s preparedness for action to achieve the Goals is being conducted by the Court of Auditors. That review aims to assess the steps taken to achieve the Goals and to formulate recommendations with a view to enhancing policy coherence and governance mechanisms.

At the 2016 high-level political forum on sustainable development, Morocco expressed its readiness to develop an integrated and convergent approach to sectoral strategies with a view to facilitating the achievement of the Goals. Indeed, as these are implemented through sectoral strategies where convergence is not always secured, thus presenting a challenge for the country, Morocco approved its 2016-2030 national strategy for sustainable development in June 2017, which could serve as a reference framework for public policies to promote sustainable development, as outlined in the National Charter on Environment and Sustainable Development. It would appear, however, that a clear position has yet to be reached on that issue. A review is currently under way to examine the coherence between the national strategy for sustainable development and the Goals, reorient the action plan for the strategy and determine the funding needed for its implementation.

1 Algeria and Tunisia have both developed national sustainable development strategies. Although those strategies have been technically validated, they have yet to be formally adopted.
In elaborating its strategy for accelerated growth and shared prosperity, Mauritania has endeavoured to take on board the Goals and key national priorities. A steering, coordinating and monitoring framework for the strategy has been established. Monitoring progress towards the achievement of the Goals, together with the development of voluntary national reports for submission to the high-level political forum on sustainable development, are key components of the strategy monitoring, evaluation and reporting system, whose monitoring matrix includes 156 indicators, including the Goals themselves.

In Tunisia, the 2016–2020 five-year development plan already addresses most Goals. An analysis of the extent to which the Goals and related targets have been integrated into the plan and governmental sectoral strategies is being carried out in line with the rapid integrated assessment methodology. That exercise is part of the five-year development plan mid-term review process, to be undertaken in 2018, and will support efforts to formulate a new five-year plan in 2019. The Government will, moreover, ensure that the Goals are addressed in the new 2030 development strategy. The Government is receiving support through a United Nations programme on support for the integration, monitoring, evaluation and reporting on the Sustainable Development Goals in Tunisia, which was launched in May 2018 in collaboration with the Ministry of Foreign Affairs and the Ministry of Development and International Cooperation. Two other cross-cutting strategies have yet to be formally adopted, namely the 2014-2020 national strategy for sustainable development and the 2016-2030 national green economy strategy – a key component of the five-year plan.

**Institutional arrangements and responsibilities for guiding, coordinating and monitoring efforts to achieve the Goals are now being implemented.**

Algeria and Mauritania have established new consultation and coordination mechanisms. In Mauritania, these include an interministerial steering committee, which is chaired by the Prime Minister, and sectoral and regional committees. In Algeria, these include an interministerial committee to coordinate and monitor the Sustainable Development Goals, chaired by the Minister for Foreign Affairs, and thematic groups on the Goals.

In Morocco, a governance framework has been established to oversee activities under the national strategy for sustainable development. This comprises two committees, namely, a strategic committee chaired by the Prime Minister, which provides input on policy, and a steering committee chaired by the Secretary of State for Sustainable Development, which monitors the implementation of the strategy. The Ministry of Foreign Affairs and Cooperation provides political leadership with regard to the Sustainable Development Goals, while the Ministry of General Affairs and Governance strives to align and harmonize public policies. How efforts to achieve the Sustainable Development Goals are to be coordinated remains unclear, however.

2 Mauritania made use of the mainstreaming, acceleration and policy support strategy and rapid integrated assessment rapid integrated assessment tools, designed by the United Nations Development Group.
3 The State Secretariat for Sustainable Development, which is overseen by the Ministry of Energy, Mines and Sustainable Development, is responsible for implementing and monitoring the national strategy for sustainable development.
In Tunisia, the Ministry of Foreign Affairs provides political leadership, while the Ministry of Development, Investment and International Cooperation provides technical coordination and is overseeing the preparation of the initial voluntary national report to be submitted to the high-level political forum on sustainable development in 2019. The development of an institutional coordination mechanism is also one of the objectives of the aforementioned United Nations programme.

Data availability is an issue that poses significant challenges for all countries, albeit to varying degrees. Studies on the availability of indicators have been carried out in all countries. In Morocco, the national statistical system is expected to produce at least 60 per cent of the indicators in the Sustainable Development Goal global indicator framework (High Commission for Planning study, 2016). In Mauritania, a March 2017 report by the Ministry of Economy and Finance on national benchmarks for the Sustainable Development Goals addressed under the strategy for accelerated growth and shared prosperity revealed that data for 54 per cent of those indicators remained unavailable. In Tunisia, the preliminary results of a July 2018 information gap analysis indicate that some 55 per cent of indicators are available. In Algeria, some 50 per cent of indicators are available. Information gaps are particularly notable with regard to environmental, agricultural and governance-related data.

To tackle that challenge and meet the need for data to inform relevant indicators, Mauritania has formulated its 2016-2020 national statistical development strategy, which builds on the outcomes of the country’s 2011-2015 strategy. Algeria, Morocco and Tunisia have established effective mechanisms for monitoring environmental and sustainable development indicators relevant to their national strategies for sustainable development,4 which could serve as a basis for an innovative Sustainable Development Goal monitoring mechanism. Consideration should therefore be given to the role which national and regional environment and sustainable development observatories could play in monitoring progress towards achievement of the Goals.

As far as reporting is concerned, Morocco is the only Maghreb country to have submitted an initial voluntary report to the high-level political forum on sustainable development. That report was submitted in 2016. Algeria, Mauritania and Tunisia have formally agreed to present their initial reports to the high-level political forum in 2019.

The question of sustainable development financing remains particularly relevant for all countries, which agree that mobilizing additional domestic resources, and boosting the contribution made by the private sector, in particular through the adoption of public-private partnership approaches (see target 17.17) and by improving the business climate with a view to attracting foreign direct investment (FDI) in key sectors, will facilitate the achievement of the Goals. To that end, countries will need to take action in order to:

- Channel financial flows towards priority sectors that will facilitate the achievement of the Goals, while ensuring that the interconnectedness of the Goals is taken into account when drawing up national budgets;

---

4 There is no operational system in Mauritania for collecting and managing environmental information.
• Diversify financing options by promoting the use of an appropriate mix of financing instruments;

• Establish effective mechanisms that facilitate contributions by private sector stakeholders and banks;

• Promote knowledge and capacity-building with a view to making more effective use of increasingly diverse and sophisticated sources of financing and financial instruments, including funds, international initiatives and green bonds.

Thematic analysis underscores both the progress that has been achieved and the challenges that lie ahead:

The Maghreb is the only African subregion that achieved the Millennium Development Goal on the eradication of extreme hunger (Food and Agriculture Organization of the United Nations (FAO), Regional Overview on Food Insecurity, 2016). The prevalence of extreme food insecurity (target 2.1 of Sustainable Development Goal 2), measured according to the Food Insecurity Experience Scale (FIES), is reported to be about 12 per cent in North Africa (excluding Mauritania, which is considered part of West Africa) compared with 26 per cent in Africa as a whole (FAO, State of Food Security and Nutrition in the World, 2017). Despite increased agricultural production, national grain production is insufficient to meet demand and remains highly vulnerable to climate change. The use of water-efficient irrigation techniques has improved and there has been a significant increase in the area of land that is irrigated for agricultural production. While agricultural investments have increased, in particular in Mauritania and Morocco, sustainable improvements in agricultural production and productivity continue to depend, in all countries, on significantly increased investments in research with a view to improving soil and water conservation techniques and addressing the sector’s vulnerability to climate change, which in particular affects women and young people. Furthermore, policies to promote innovation suffer from a lack of coordination and private sector engagement. None of the countries have complied with the recommendation of the African Union that at least 1 per cent of gross domestic product (GDP) should be spent on research and development.

Curbing unemployment and enhancing the employability of young people and women are among the priorities addressed by overarching and certain sector-specific public policies, which should be implemented in a systematic manner at the local level. These issues must be tackled in a comprehensive and coordinated manner by means of a series of mutually reinforcing measures that promote economic diversification, close gaps in local development that have resulted in a massive exodus of young people towards urban centres, help integrate the informal sector (which presently constitutes the primary employer of young people) into the formal economy, narrow the gap between skill sets and economic sector needs, and broaden and provide more effective support structures to promote entrepreneurship. Programmes have been designed to improve the employability and occupational integration of young people and to promote entrepreneurship. Indeed, all countries have established dedicated bodies, including the National Youth Employment Support Agency (ANSEJ) in Algeria, the National Agency for Employment and Skills Promotion (ANAPEC) in
Morocco, the National Agency for the Promotion of Youth Employment (ANAPEJ) in Mauritania and the National Agency for Employment and Self-Employment (ANETI) in Tunisia. Overall, however, the impact of all those relatively costly schemes, which are insufficiently targeted and reach only a limited number of young people, remains limited.

A number of key challenges related to precarious work, informal employment, social security protections and disparities in employment between men and women and among regions and employment sectors are still not adequately addressed.

Access to electricity (target 7.1) is almost universal, except in Mauritania, where access in 2014 stood at 38.8 per cent. The four countries are endeavouring to strengthen energy security by bringing new electricity generation capacity on line, diversifying the energy mix, in which fossil fuels, including gas, oil and coal, currently constitute more than 70 per cent of the total, harnessing those countries’ significant renewable energy potential, including through wind, photovoltaic and concentrated solar power generation, and by improving energy efficiency. The latter two areas also present opportunities for the development of new industrial sectors that can create added value and sustainable employment. Within the context of their nationally determined contributions, all the countries are committed to reducing their carbon dioxide emissions by 2020. Notwithstanding the ambitious targets that have been set, progress achieved in terms of energy transition varies among countries. Mauritania and Morocco have substantially boosted the share of renewable energy in their energy mix, but further efforts are needed to promote energy efficiency.

The economies of the Maghreb countries remain insufficiently diversified and unsophisticated. Those countries have few exports and are overly dependent on imports. As a key pillar of economic and social development, the manufacturing industry provides an opportunity for developing higher value-added sectors and creating jobs. Yet the share of this sector in terms of those countries’ GDP has failed to increase significantly in recent years and has created few jobs. While in industrialized countries medium and high-tech products make up some 80 per cent of manufacturing output, this figure is a mere 10 per cent in the Maghreb countries. Industrial integration, namely the development of local content, has become a strategic challenge requiring the development of innovative programmes to facilitate the substitution of a large proportion of industrial imports and stimulate exports. Today, the contribution of industry to national research and development and innovation efforts remains marginal. Furthermore, climate risk adaptation, greenhouse gas emission reduction and energy efficiency are not addressed explicitly in industrial policies.

Combating desertification, managing water resources and preserving forest cover are still major challenges for the Maghreb countries, and desertification and land degradation threaten between 80 and 90 per cent of their national territories. While some major projects and programmes have been implemented as part of those countries’ sectorial strategies and national plans of action to combat desertification, successful outcomes, namely reforestation and the stabilization of coastal and continental dunes, remain inadequate in the light of the challenges that those countries face, which are being further exacerbated by climate change.
Initial report on the achievement of the Sustainable Development Goals in the Maghreb

Adaptation to climate change is a priority for all of the countries, which are all developing national adaptation plans in line with the Cancun Adaptation Framework. Adaptation is an integral part of countries’ nationally determined contributions established pursuant to the Paris Agreement on climate change. To facilitate implementation of the Sendai Framework for Disaster Risk Reduction 2015-2030, countries have made institutional and legislative progress and established dedicated financial mechanisms. Gaps remain, however, in terms of relevant know-how and detailed assessments of major risks and how those should be addressed in national planning, investment and development decisions. Countries must adopt multi-risk, better structured and more inclusive oversight policies, and enhance coordination among relevant stakeholders, including ministerial departments and public and semi-public bodies.

Regional cooperation is set to play a central role in the implementation of the 2030 Agenda, empowering countries to address their shared challenges through the adoption of more appropriate, cost-effective and transferable solutions. Key agreements concluded in 2015, namely the 2030 Agenda, Agenda 2063 of the African Union, the Paris Agreement and the Addis Ababa Action Agenda of the Third International Conference on Financing for Development, stress the importance of supporting projects and cooperation frameworks that promote regional integration, collaboration and knowledge sharing, in particular in Africa.

With a market of more than 90 million consumers, the Maghreb remains one of the world’s least integrated regions, both in terms of intraregional integration and in terms of the Maghreb countries’ integration into the global economy. Intra-Maghreb trade totals approximately 3 per cent of the total external trade of the five countries, and, according to ECA, stood at only 3.35 per cent in 2012. Intra-Maghreb foreign direct investment projects, which originate mainly in Morocco and Tunisia, remain limited.

While regional priorities are reasonably clearly defined, there are few strategic frameworks in place to steer action by the four countries and no Maghreb-level targets have been established. Furthermore, although the countries share the same strategic challenges, national policies are seldom designed with the objective of promoting intra-Maghreb cooperation. AMU and its member countries must step up their efforts to translate the numerous commitments they have made into tangible actions and must work together to solve common problems, in particular by harmonizing policies and regulations, stimulating intraregional agrifood trade, creating regional value chains, fostering the development of cross-border energy infrastructure and promoting the transfer of technology and the sharing of knowledge and best practices.

AMU can play an important role by facilitating efforts by its member countries to implement the 2030 Agenda and Agenda 2063 and by monitoring progress in that regard. To that end, it should step up its leadership role in regional coordination so as to bolster synergies among subregional interventions by development partners, and it should enhance the impact of those interventions by encouraging resource sharing. AMU should also take action in support of the following five objectives:
• Development of a Maghreb-wide sustainable development strategy in support of efforts by AMU member countries to achieve the Sustainable Development Goals and implement Agenda 2063;

• Regular reviews of the sustainable development landscape and of progress achieved in that regard, and the outlook for further progress in Maghreb countries;

• Capacity-building for AMU staff;

• Sharing of knowledge and best practices among AMU member countries in key sectors, including statistics, research and technological innovation and skills training;

Implementation of subregional initiatives to support African Union pan-African initiatives.
General introduction

1. Regional and global context

The 2030 Agenda was adopted on 25 September 2015 by Heads of State and Government at the United Nations Summit on Sustainable Development, which was held in New York during the seventieth session of the General Assembly on the theme “Transforming our world: the 2030 Agenda for Sustainable Development”. The Agenda came into effect on 1 January 2016 and is now the global reference framework for national, regional and international action in the area of sustainable development. The Agenda establishes 17 Goals with 169 targets to be achieved by 2030. To monitor progress towards those Goals and related targets, a set of 244 global indicators was approved by the United Nations Statistical Commission in March 2017 and by the Economic and Social Council in June 2017. All countries are called upon to adopt this global framework at the national and local levels and to integrate the Goals into their policies and strategies, in line with their national priorities and specific circumstances. It is also the responsibility of States to ensure implementation of the 2030 Agenda and to carry out periodic follow-up activities to that end.

General Assembly resolutions 67/290 and 70/299 underscored the key role of the United Nations regional commissions in supporting the achievement of the Sustainable Development Goals and the global monitoring process, which is led by the high-level political forum on sustainable development. On 1 January 2016, a statement of collaboration was agreed upon by the United Nations Development Group and the regional commissions, with a view to strengthening cooperation and coordinating efforts by the United Nations in support of implementation of the 2030 Agenda and Sustainable Development Goal follow-up.

At the continental level, the development priorities of Africa are set forth in Agenda 2063, which was adopted by the African Union in January 2015. Action is now being taken to operationalize the Agenda’s first ten-year implementation plan (2014-2023). The Africa Regional Forum on Sustainable Development was established pursuant to resolutions 930 (XLVIII) and 939 (XLIX) of the Joint Annual Meetings of the African Union Specialized Technical Committee on Finance, Monetary Affairs, Economic Planning and Integration and the ECA Conference of African Ministers of Finance, Planning and Economic Development. The Africa Regional Forum seeks to monitor implementation of Agenda 2063, the Sustainable Development Goals and the

---

5 Since not all global indicators are necessarily relevant to the situation of each region or country, parallel or complementary indicators may be established by regions and countries in accordance with the priorities, realities, capacities and circumstances of each State.

6 The high-level political forum on sustainable development provides political leadership at the global level, facilitates follow-up and reviews progress in the implementation of the 2030 Agenda and the Addis Ababa Action Agenda of the Third International Conference on Financing for Development (General Assembly resolution 67/290 of 9 July 2013).

7 Agenda 2063 constitutes the strategic framework for promoting the economic and social transformation of Africa. It includes 20 objectives, 174 targets and 39 priority areas, and its objectives are 90 per cent aligned with the Sustainable Development Goals.
Addis Ababa Action Agenda of the Third International Conference on Financing for Development. More specifically, it facilitates the sharing of experiences and lessons learned from national voluntary reviews, the integration of regional and subregional perspectives, and the strengthening of regional cooperation and partnerships. The Forum, which meets annually, is an integral part of the 2030 Agenda monitoring and review process. It provides input to the annual sessions of the high-level political forum on sustainable development and facilitates information sharing among review mechanisms at the national and global levels. Secretariat functions of the Forum are provided by ECA, in collaboration with the African Union Commission, the African Development Bank, the United Nations Development Programme (UNDP) and other United Nations agencies. Since 2017, ECA, in collaboration with the African Union Commission, the African Development Bank and UNDP, has produced an annual report on sustainable development in Africa, which reviews progress towards the achievement of the Goals and the implementation of the Agenda 2063 first ten-year implementation plan (2014–2023).

At the first meeting of the high-level political forum on sustainable development, held in July 2016, 22 countries, including Egypt and Morocco, submitted voluntary national reports. In 2017, 44 countries, but no countries from North Africa, submitted reports. In 2018, reports were submitted by 46 countries, including Egypt and the Sudan, while Algeria, Mauritania and Tunisia are preparing reports for submission in 2019.

2. Aim and scope of the report

At a December 2016 meeting of the subregional coordination mechanism, organized by the ECA Subregional Office for North Africa in collaboration with AMU, the latter called for the formulation of a report on progress towards the achievement of the Sustainable Development Goals in the Maghreb countries, and requested ECA to assist in that endeavour. The present report has been formulated in that context and covers four countries, namely Algeria, Mauritania, Morocco and Tunisia.

The report begins by analysing efforts made by those countries in the areas of ownership and contextualization (prioritization and the adoption of national targets and indicators), together with strategic planning, governance (guidance and coordination mechanisms), financing and Sustainable Development Goal monitoring. It then provides an overview of progress made by the countries in six thematic areas of particular importance for those countries that are critical to regional integration efforts, namely food security, energy transition, youth and women’s employment, industrialization, climate change and desertification. Those thematic areas were chosen in coordination with AMU.

8 Voluntary national reporting lies at the heart of the process for monitoring progress towards the achievement of the Sustainable Development Goals. Voluntary national reports are submitted with a view to sharing experiences, including good practices, challenges and lessons learned, and accelerating the implementation of the 2030 Agenda at the global level.
9 The subregional coordination mechanism aims to improve the coordination, coherence and complementarity of efforts by the United Nations in support of AMU. The ECA Subregional Office for North Africa provides the secretariat for the mechanism, which meets on an annual basis.
10 Each country establishes and defines its targets and indicators on the basis of the global indicator framework and in line with national priorities and the challenge posed by inequality, in order to cover all population groups.
The common challenges faced by Maghreb countries have resulted in insufficient, irregular and non-inclusive growth, structural deficits in the areas of food and energy security, high unemployment rates, in particular among young people, tertiary education graduates and women, economies that remain insufficiently diversified, an uncompetitive industrial sector that is poorly integrated into regional and global value chains and societies that remain particularly vulnerable to the impact of climate change. The present report also looks at how regional cooperation could facilitate the achievement of the Sustainable Development Goals and provides guidance to AMU on how it can effectively support the achievement of the Goals in its member countries and coordinate regional-level initiatives. The report concludes with a number of recommendations on ways to accelerate the achievement of the Goals in the four Maghreb countries.

3. Methodology and limitations

The present report was formulated on the basis of a literature review, interviews conducted by the Subregional Office with national institutional stakeholders and United Nations agency country missions, national reports drafted by consultants, responses to a questionnaire designed by the Subregional Office and transmitted to relevant national institutions, including planning institutions, sectoral ministries and statistical institutes. In addition to a number of open questions, the questionnaire includes questions related to indicators to be completed for each of the thematic areas covered by the report. Most of the data used in the report were obtained from national sources, including statistical offices and sectoral departments. Policy documents were also consulted. All international sources used have been cited.

The report was prepared while the region was undergoing significant change, including changes to governments. Those changes included cabinet reshuffles in Tunisia in 2016 and 2017, and legislative elections in Morocco and Algeria in 2017. Furthermore, a number of ministerial departments in Morocco and Tunisia have been slow to establish mechanisms for steering and coordinating efforts to achieve the Sustainable Development Goals.

Difficulties encountered in the preparation of the report include:

- Gaps related to the availability and reliability of data: challenges related to accessing information, the partial completion of questionnaires, lack of coherence among statistics provided by statistical offices and sectoral departments, the use by countries of different benchmarks and methodologies to inform certain indicators, which made it difficult to compare indicators across countries;

---

11 The national report of Tunisia has not yet been issued.
12 In Morocco, sustainable development is promoted by the State Secretariat of the Ministry of Energy, Mines and Sustainable Development. In Tunisia, it is promoted by the Ministry of Local Affairs and the Environment, which incorporates a Directorate-General for Sustainable Development. Mauritania established its Ministry of Environment and Sustainable Development more than ten years ago.
• Lack of voluntary national reports on the achievement of the Sustainable Development Goals;

• Gaps related to the monitoring and evaluation of public and sectoral policies – certain reports were simply not available;

• Limitations related to the use of certain global framework indicators (see box 1).

Although these difficulties and gaps hampered in-depth analysis, they helped to focus attention on a number of salient points related to the use of indicators.

**Box 1: Limitations related to the use of certain global framework indicators**

**Prevalence of moderate or severe food insecurity, according to the Food Insecurity Experience Scale (FIES).** The FIES methodology has not yet been integrated into national surveys. Only Mauritania provided data from its household food security monitoring survey, which is conducted periodically by the Mauritanian Food Security Commission and the World Food Programme (WFP). Countries should ensure that future household surveys make use of the FIES methodology and are carried out on a more regular basis. Algeria, for example, conducts a national household survey every 10 years, with the most recent survey conducted in 2011.

The indicator on the **average income of small agricultural producers, disaggregated by sex and indigenous status (2.3.2)** was not reported by the countries, even though increasing the incomes of smallholder farmers is a clear agricultural policy goal and despite the fact that the agrarian system is dominated by small-scale family farms.

**Proportion of agricultural land exploited in a productive and sustainable manner (2.4.1).** This indicator needs to be defined precisely according to an agreed methodology and set of benchmarks. The report uses two subindicators: first, the share of total irrigated land using water-efficient irrigation systems; and, second, the area of land allocated for organic agriculture.

**Public agricultural expenditure.** This indicator assesses whether public spending on agriculture reflects the economic importance of the sector. Use of this indicator requires a standardized benchmark on public agricultural expenditure, which differs from country to country.

**Public investment in agricultural research.** Data on research efforts in relation to the economic importance of the sector, as expressed as a proportion of agricultural GDP, are only available for Morocco, where investments in research are equivalent to 0.13 per cent of GDP. The indicator used by countries is generally “public investment as a percentage of total investment in the agricultural sector”.

**Energy intensity.** This indicator is calculated from consumption data derived from energy audits and GDP figures from national accounts. The data provided by the countries could not all be used for reasons of unreliability and inconsistency.

Efforts must be made to harmonize the calculation methodologies for this indicator and to strengthen national energy information systems so that they can provide reliable and comparable data.

The indicator on **total public expenditure on youth employment programmes (8.b.1)** was not reported by the countries.

The indicator on **adapting industries to make them more resilient and sustainable (9.4)**, which, among other factors, addresses carbon dioxide emissions per unit of value added (9.4.1), was not reported by the countries.

**Area of degraded land, in proportion to land area (15.3.1)**: this was not reported by the countries.

**Area of forested land, in proportion to the land area (15.1.1)**: there are a number of uncertainties with regard to the available data.

**Progress towards sustainable forest management (15.2.1)**: in order to report on this complex indicator, countries require conceptual and methodological support.
4. **Indicator framework used in the thematic analysis**

The thematic analysis was conducted on the basis of a set of 18 targets and 24 indicators relevant to the subregion. The targets and indicators used were selected on the basis of the global indicator framework (2030 Agenda) and priority objectives set forth in national and subregional policy frameworks (a maximum of three or four targets for each Sustainable Development Goal). The selection made also depended on the availability of corresponding data in the four countries, in order to facilitate comparability. For each thematic area, the evolution of the indicators over the period 2010-2016 was evaluated (See annex).
Chapitre 1: National approaches to strategic planning, steering, financing and follow-up with a view to achieving the Sustainable Development Goals

This chapter reviews countries’ efforts to promote Sustainable Development Goal ownership and the integration of the Goals into national, sectoral and territorial strategic planning frameworks, together with efforts to enhance policy coherence with a view to fostering sustainable development at all levels. It also looks at existing institutional mechanisms for steering, coordination and monitoring as well as consultation mechanisms established to facilitate the participation of civil society, the private sector and local communities in a dialogue on Sustainable Development Goal policy, implementation and follow-up.

The process to establish national ownership of the Sustainable Development Goals has begun in all the countries, and includes national and regional workshops, sectoral workshops, awareness-raising activities conducted in the languages of those countries and surveys to ascertain citizens’ knowledge of pertinent issues. Steps should now be taken to accelerate and integrate awareness-raising initiatives at national and local levels and to hold consultations with private-sector stakeholders, local communities and civil society.

The absence of institutional mechanisms for Sustainable Development Goal oversight and the governmental changes that have taken place in certain countries have hampered efforts to contextualize and prioritize the Sustainable Development Goals and their associated targets and indicators.

Only Mauritania has established a development planning framework that incorporates all the Sustainable Development Goals and priority targets and the 2030 Agenda timeframe. However, the other three countries have taken initial steps to that end.

It should be emphasized, moreover, that, while all the countries have formulated national strategies for sustainable development, those strategies are viewed, primarily, as tools for integrating environmental concerns into global and sectoral policies. Departments concerned with the environment or sustainable development are responsible for the development and implementation of those strategies.

Ownership and focus on the Sustainable Development Goals in national planning processes

In Algeria, the amended Constitution of 2016 makes explicit reference to a number of key sustainable development principles, including social and territorial equity (articles 15, 32, 34, 63 and 72, as amended, and the new article 36), the protection of the
Initial report on the achievement of the Sustainable Development Goals in the Maghreb

environment (article 9, as amended) and civil engagement (article 204 and the new article 205).

Although the country’s new economic growth model makes no explicit reference to the 2030 Agenda, it incorporates many issues related to the Sustainable Development Goals, including those discussed in the present report. The model aims to accelerate the development of priority sectors, namely industry, agriculture, renewable energy and research and development, and seeks to promote economic diversification and the revival of the industrial manufacturing sector with a view to accelerating growth and boosting employment, in particular among young people. Between 2020 and 2030, non-hydrocarbon annual GDP growth rates of 6.5 per cent are expected. Manufacturing is expected to generate some 10 per cent of GDP (up from 5.3 per cent in 2015). The agricultural sector is expected to grow at an annual rate of 6.5 per cent, with a doubling of cereal production thanks to the modernization of the sector and a significant increase in the area of irrigated land.

Significant investments will be made in high value-added sectors such as agribusiness, renewable energy and energy efficiency, and also the knowledge economy. The overall cost of the 2015-2019 five-year growth plan is estimated to be $262.5 billion. A new national strategy for the environment and sustainable development for the period 2018-2035, and its associated plan of action for the period 2017-2022 have been developed. The national strategy comprises seven axes, which focus on the improvement of health and quality of life, the preservation of natural and cultural capital, the development of the green and circular economy, bolstering resilience with a view to addressing desertification, enhancing climate change resilience, food security and environmental governance.

The process of integrating the Sustainable Development Goals into national and local plans, policies, budgets and statistical systems was launched with the support of the United Nations. A Sustainable Development Goal awareness day, which brought together governmental and non-governmental actors, was organized in 2016 by the Ministry of Foreign Affairs and the National Economic and Social Council, in collaboration with United Nations system agencies. Provincial-level workshops and meetings on each Sustainable Development Goal are planned in order to publicize and promote the 2030 Agenda in Algeria. The Court of Auditors is presently overseeing a review of the Government’s preparedness to take action to achieve the Sustainable Development Goals, with a view to making recommendations on ways to enhance policy coherence and governance mechanisms.

In Morocco, the 2011 Constitution enshrines sustainable development as a right for all citizens. A national charter and a framework law on the environment and sustainable development have been adopted. That law emphasizes the principles of integration, responsibility and engagement. The 2016-2030 national strategy for sustainable development, which focuses on the transition to a green economy, was formulated and approved in 2017. The strategy constitutes a unifying framework that sets the course for all public and sectoral policies and guides the actions of all

---

13 In 2016, hydrocarbons accounted for 93.84 per cent of the total volume of the country’s exports.
14 National plan of action for the environment and sustainable development.
stakeholders, with a view to achieving dynamic economic and social development. It aims to promote coherence and complementarity among the sectoral strategies, plans and programmes being implemented in order to improve their efficiency. It highlights the key role of the private sector, local authorities and non-governmental organizations. In its current formulation, the strategy, which comprises economic, social, environmental and cultural pillars, comprehensively integrates most of the Sustainable Development Goals. Only Goal 5 on gender is not specifically addressed by the strategy, while Goal 8 on employment is not comprehensively addressed. A study is currently being prepared to review coherence between the national strategy for sustainable development and the Sustainable Development Goals and refocus the strategy action plan to accelerate achievement of the Goals. That study also includes a diagnosis of the status quo in Morocco in relation to the implementation of the 17 Goals. The strategy will be implemented through 2019-2021 sectoral sustainable development action plans. At the territorial level, discussions are under way to ensure that implementation of the strategy is consistent with the country’s regional development plans.

In 2016, Morocco conducted regional awareness-raising workshops on the Sustainable Development Goals and national consultations on the contextualization of the 2030 Agenda. On the basis of those consultations, an initial list of national Sustainable Development Goal priorities and a road map for implementation, monitoring and evaluation of the Goals were formulated. The road map focuses on the following strategic areas: strengthening national Sustainable Development Goal ownership; contextualizing the Sustainable Development Goals and integrating them into sectoral policies; capacity-building for institutional actors; and the establishment of an integrated system for monitoring and evaluating public policies relevant to the Goals. The High Commission for Planning has completed a preliminary review of the convergence of sectoral policies with the Sustainable Development Goals, together with an initial review of the availability of indicators in order to assess the country’s capacity to generate statistics that can inform Goal indicators. A modelling tool to map out an appropriate macroeconomic framework and to assess the combined effects of various Sustainable Development Goal targets is being developed.

Mauritania has established national goals and targets for all Sustainable Development Goals in its 2016-2030 strategy for accelerated growth and shared prosperity, which was adopted in October 2017 following extensive sectoral and regional consensus-building efforts involving all relevant stakeholders. The strategy now constitutes the reference framework for sectoral and regional development policies and strategies and is the main instrument for implementing the 2030 Agenda. It has three major activity areas, namely promoting strong, sustainable and inclusive economic growth; developing human capital and improving access to basic social services; and strengthening all aspects of governance. Those areas are reflected in 15 strategic

---

15 Key challenges include increasing growth rates, creating jobs, improving the quality of human capital and reducing inequalities.
16 The strategy for accelerated growth and shared prosperity integrates targets that have been prioritized by one or more sectors.
17 The strategy for accelerated growth and shared prosperity sets forth sectoral development strategies, including in the areas of education, health, fisheries, employment and food security, that are to be implemented by 2030, and also during the implementation period of the national strategy for statistical development, which covers the period 2016-2020.
projects and 59 priority interventions, which include key reforms, programmes, and projects. At the regional level, strategy guidelines are implemented through strategies for accelerated regional growth and shared prosperity, which ensure the coherence of regional development strategies and programmes and establish priority actions for the region. Mauritania has recently formulated an environment and sustainable development strategy for 2017-2030, together with a related five-year action plan, following an in-depth evaluation of the 2007-2016 national strategy for sustainable development and the country’s second national action plan for the environment, which covered the period 2012-2016. The new strategy should contribute to the achievement of the environmental objectives set forth in the strategy for accelerated growth and shared prosperity and ensure coherence among actions taken by government authorities in that regard. It provides direct support to 10 environment-related objectives laid out in the 17 Sustainable Development Goals and aims specifically at reversing environmental degradation, combating climate change and disaster risks, and developing the country’s natural resources with a view to sustaining green and inclusive growth and reducing rural poverty.

In Tunisia, the country’s 2016-2020 five-year development plan, which was formulated following regional consultations and collaborative efforts by interministerial sectoral technical commissions, was formally adopted by Parliament in late April 2017. The plan establishes development priorities and key strategic guidelines and comprehensively addresses all Sustainable Development Goals with the exception of Goal 13, on climate action, and Goal 14, on the sustainable conservation of marine resources. The plan stresses the need to promote sustainable development and proposes a series of reforms aimed at improving governance, promoting balanced regional development and a diversified, competitive and higher value-added economy, reducing poverty and unemployment, supporting energy transition and the sound management of natural resources, and fostering the creation of a green economy. Quantitative and qualitative targets are stipulated to facilitate the achievement of the national objectives set forth in the plan.

A joint programme to support integration, set up a monitoring and evaluation mechanism and report on the Sustainable Development Goals was agreed with the United Nations in May 2018. An analysis of the extent to which the Sustainable Development Goals and related targets have been integrated into the plan and a number of governmental sectoral strategies are currently under way, in line with the rapid integrated assessment methodology. The formulation of the new five-year plan in 2019 will provide an opportunity to more effectively incorporate the Sustainable Development Goals and priority targets. The five-year development plan mid-term review process is to begin in 2018.

An initial regional Sustainable Development Goal adaptation initiative has been conducted for the governorate of Medenine. In line with the activity areas and strategic objectives of the regional five-year plan for the period 2016-2020, 14 priority Sustainable Development Goals and corresponding local targets and indicators have been identified. A provisional mechanism for monitoring and evaluating those Sustainable Development Goals has been proposed. The initiative has also enhanced territorial stakeholders' familiarity with the Goals.
Tunisia has also formulated two cross-cutting strategies that have yet to be formally adopted, namely the 2014-2020 national strategy for sustainable development, which refers, both explicitly and implicitly, to several of the Sustainable Development Goals, in particular those pertaining to the environment, but does not set forth quantitative targets, and the 2016-2030 national strategy for the green economy, which addresses strategic challenges related to food security, youth unemployment and industrial transition. Those policy frameworks are important instruments for the implementation of the 2030 Agenda, while the current five-year plan and the national strategy for sustainable development both end in 2020. They address poverty alleviation, food security and sustainable agriculture, health, high-quality education, gender equality, water and sanitation, energy services, economic growth, infrastructure, sustainable cities, the environment, peace, justice and effective institutions.

**Institutional steering and follow-up mechanisms**

In Algeria, an interdepartmental committee for coordination and monitoring of the Sustainable Development Goals, which is chaired by the Ministry of Foreign Affairs, was established in 2016. The committee includes representatives of all sectoral departments, the National Statistics Office and the National Economic and Social Council. The committee is responsible for coordinating, steering and monitoring efforts to achieve the Sustainable Development Goals and their integration into sectoral strategies, and six Sustainable Development Goal thematic groups have been created to that end. Each thematic group is chaired by a stakeholder from the sector most involved in the Goal in question. Sustainable Development Goal monitoring units have also been created within ministerial departments and those units are currently taking action to establish priority targets for the achievement of the Goals. The National Statistics Office and the National Economic and Social Council are represented in each group. The National Economic and Social Council[18] is, moreover, reviewing the roles of civil society and the private sector in the implementation of the 2030 Agenda.

Morocco has yet to define clearly an institutional mechanism to guide, coordinate and monitor initiatives to achieve the Sustainable Development Goals. Those activities are, however, undertaken by a number of cross-cutting departments, including the following:

- The Department of Foreign Affairs and International Cooperation is coordinating the implementation of a joint United Nations-Government programme for the period 2017-2021 to support the implementation, monitoring and evaluation of the Sustainable Development Goals. The programme comprises four components: first, strengthening Sustainable Development Goal ownership by national and local stakeholders; second, coordinating and aligning the Goals with national priorities; third, establishing a statistical information system and an effective system for monitoring, reporting on and evaluating the Sustainable Development Goals; and, fourth, outlining a Sustainable Development Goal financing mechanism.

---

18 The National Economic and Social Council constitutes an interface with civil society and social and economic entities.
- The Ministry of General Affairs and Governance is responsible for aligning public policies. Steps are being taken to establish a national interministerial committee for public policy.

- The State Secretariat for Sustainable Development, which was established in 2017, is responsible for implementing and monitoring implementation of the national strategy for sustainable development and acts as chair of the strategy steering committee.

- The High Commission for Planning is the reference institution for the provision of statistical information.

In Mauritania, the institutional framework for monitoring implementation of the strategy for accelerated growth and shared prosperity comprises steering, consultation and coordination bodies, as well as technical working groups and sectoral development committees. Those bodies and committees work alongside regional development committees that monitor implementation of the regional strategies for accelerated growth and shared prosperity. The Ministry of Economy and Finance provides secretariat services for the interministerial steering committee, which is chaired by the Prime Minister and oversees the formulation and implementation of the strategy for accelerated growth and shared prosperity and endorses annual implementation reports. The Ministry also chairs the expanded consultation committee, for which secretariat services are provided by the Ministry Directorate-General for Development Policy and Strategy.

The expanded consultation committee supports dialogue among the Government, technical and financial stakeholders, the private sector, civil society and local communities, and facilitates the mobilization of the financial resources necessary for implementation of the strategy for accelerated growth and shared prosperity. The Coordination Directorate for the strategy, which is overseen by the Directorate-General for Development Policy and Strategy at the Ministry of Economy and Finance, provides follow-up, evaluation and reporting services.

In Tunisia, the institutional framework for directing and monitoring the implementation of initiatives to achieve the Sustainable Development Goals has yet to be formally established. At present, the Ministry of Foreign Affairs provides political leadership, while the Ministry of Development, Investment and International Cooperation is responsible for interministerial technical coordination.

The latter is overseeing the preparation of the initial voluntary national report. A preliminary list of indicators was proposed at a national workshop held in May 2017.

The mandate of the new Ministry of Local Affairs and the Environment, which includes a Directorate-General for Sustainable Development, still needs to be clarified. The new institutional framework will need to incorporate existing bodies, including the National Commission for Sustainable Development, which formerly played a coordinating role.

---

19 The State Secretariat, which was established in 2017, is overseen by the Ministry of Energy, Mines and Sustainable Development.
but has remained inactive since 2011, and the Constitutional Authority on Sustainable Development and the Rights of Future Generations, provided for in the amended Constitution, adopted on 27 January 2014. The latter is an advisory body which represents various groups within society but whose organizational and operational statutes are still awaiting promulgation.

Framework for monitoring the Sustainable Development Goals

The development of national statistical systems and their capacity to respond to emerging Sustainable Development Goal-related needs differ from country to country. Inadequate integration and harmonization of existing information systems and methodologies – a consequence of limited human and financial resources – is the most important challenge to be addressed as it often results in dispersed data, data inconsistencies and the use of low quality data sources. In order to integrate the Sustainable Development Goals into existing statistical production processes, adaptation initiatives and additional funding will be needed so as to broaden the scope of statistical production and promote the accessibility and optimal use of statistical information. Every effort should be meet the information needs associated with each national indicator.

In Algeria, the National Statistics Office has undertaken an evaluation of the national statistical system with a view to facilitating Sustainable Development Goal monitoring. A number of sustainability indicators are generated on a regular basis by the Office or other sectoral departments. The National Statistics Office is a member of the Inter-Agency and Expert Group on Sustainable Development Goal Indicators, which was established by the United Nations Statistical Commission. The experience of the National Observatory on the Environment and Sustainable Development could also be used with a view to facilitating the monitoring and evaluation of the national environmental strategy and the national action plan for the environment and sustainable development.

In Morocco, the High Commission for Planning is responsible for monitoring and reporting on the Sustainable Development Goals and is currently taking action to mainstream the Goals into ongoing programmes and surveys, including by revising questionnaires and adding relevant variables. The High Commission-led national statistical system, including sectoral mechanisms, operates in accordance with established best practices and international standards, such as those adopted by the Statistics Division of the United Nations, the International Labour Organization (ILO), the International Monetary Fund and the 2008 System of National Accounts. Morocco is considered a country with a very high statistical capacity20 and statistical indicators are, for the most part, produced on a regular basis and published in accordance with established timeframes.

According to a preliminary assessment conducted by the High Commission for Planning, the national statistical system is able to track at least 48 per cent of the Sustainable Development Goal indicators. The missing data relate, in particular, to Goals on governance and environmental issues.

---

20 An assessment conducted by the World Bank in 2016 gave Morocco a score of 84.4 out of 100.
Mauritania has established a preliminary matrix of 156 indicators relevant to its strategy for accelerated growth and shared prosperity, of which 39 are relevant to the Sustainable Development Goals, and has formulated an initial report on the baseline Sustainable Development Goal situation, which was published by the Ministry of Foreign Affairs in March 2017. That report identified a set of targets and indicators relevant to national circumstances and, on the basis of the most recent data available, established a baseline for selected indicators. The report emphasized that 54 per cent of the indicators have still not been measured and proposed recommendations on ways to facilitate the integration of those indicators into existing statistical systems. The 2016-2020 national strategy for the development of statistics has been updated to reflect emerging needs for data that can be used to inform the indicators of the strategy for accelerated growth and shared prosperity. The national statistical system faces a number of challenges related to its lack of conformity with the African Charter on Statistics, which has not yet been ratified by Mauritania, the fact that the National Statistical Commission is not yet functioning optimally, weaknesses in certain sectoral information systems, the inefficient use of administrative data sources, long delays in terms of data provision, the lack of suitably qualified staff and insufficient funding.

Mauritania is completing its transition to the 2008 System of National Accounts. The system for monitoring the strategy for accelerated growth and shared prosperity provides for an annual implementation report which will facilitate broad-based national discussions. That report will be informed by annual sectoral and regional reviews. A road map has been formulated to facilitate the launch of the strategy monitoring and evaluation process, and was discussed with a wide range of stakeholders at a workshop held on 18 December 2017. The road map identifies, in particular, key monitoring and evaluation capacity-building requirements, including information technology equipment, training plans, technical assistance and the creation of databases, and places particular emphasis on the need to take gender into account. The road map also provides for the preparation of a voluntary national report on the Sustainable Development Goals in 2019.

In Tunisia, the current statistical system is already producing a critical mass of data. Significant challenges remain, however, including those related to information gaps on the environment and governance, insufficient generation of disaggregated and regional indicators, and the fact that it is difficult to obtain certain data on an annual basis (some surveys are only conducted once every five years). The National Institute of Statistics is now ascertaining the availability of the indicators set forth in the Sustainable Development Goal global indicator framework. Preliminary results of that data gap analysis, which were presented in July 2018, indicate that some 55 per cent of indicators are available.

Most countries have established environmental monitoring and sustainable development systems, which should be leveraged as part of the Sustainable Development Goal follow-up process. The Moroccan National Observatory on the Environment regularly tracks the adopted sustainable development indicators and produces reports on those indicators and on the state of the environment. The National Observatory operates at the regional level through 16 regional observatories on the

---

21 Numerous indicators relating to the industrial sector, sectoral employment, the terrestrial environment and research are still unavailable.
environment and sustainable development. In Tunisia, the Tunisian Observatory on the Environment and Sustainable Development, which operates under the auspices of the National Agency for Environmental Protection, is responsible for collecting and generating data on the environment and sustainable development. In 2013, the Observatory revised its list of sustainable development indicators in the light of the nine challenges set forth in the new national strategy for sustainable development. The Observatory has regularly produced reports on sustainable development indicators, and the fifth such report was published in 2014. Although its expertise is widely recognized, the Tunisian Observatory on the Environment and Sustainable Development must, nonetheless, enhance its data collection and dissemination capacities.

**Financing**

Given their weak financing and savings capacities and the multiple sustainable development challenges that they face, the countries acknowledge that they must adopt innovative approaches to financing that encompass:

- An efficient allocation of funding so that countries can effectively address the needs stipulated in integrated development plans. Funding efforts should be complemented by public investment programmes that provide clear direction to financial actors;

- Improvements to the business climate and accelerated reforms to promote domestic and international private investment and public-private partnerships;

- Engagement with development and commercial banks, and the use of various financial instruments, including green bonds, green lines of credit and multilateral financing.

In Morocco, a 2018 finance bill earmarks more than 1 billion Moroccan dirhams to fund initiatives by the State Secretariat for Sustainable Development that directly support the achievement of the Sustainable Development Goals. Furthermore, the national strategy for sustainable development provides that the National Fund for the Environment should be used as a national fund for the promotion of sustainable development. In Tunisia, the new investment law provides financial and fiscal incentives for those investing in sustainable development, including in the areas of renewable energy, clean technologies, research and development, boosting employment and the development of value chains. Mauritania will, moreover, take action to align the strategy for accelerated growth and shared prosperity with the country’s medium-term budget framework and its public investment programme.

Dedicated funds have been established in all countries. These include an industrial competitiveness promotion fund, a national environment fund, a national fund for energy management and efficiency, a renewable energy development fund, an agricultural development fund and a natural disaster mitigation fund. Furthermore, Morocco has recently completed a feasibility study for the creation of a national climate fund.
In order to reduce their budget deficits, the countries have taken action to reform their fossil fuel subsidy regimes, which are costly, ineffective and inequitable. Progress varies widely among countries. Morocco has undoubtedly made most progress in this area, and has abolished subsidies for petroleum products (although butane gas subsidies remain in place). Algeria has initiated a review prior to carrying out welfare and subsidy policy reforms and establishing effective mechanisms that enhance the provision of assistance to disadvantaged social groups. Plans are being developed for the reduction of energy subsidies, which account for 10 per cent of all subsidies provided by the State. Tunisia has recently removed its fuel subsidies. Energy subsidies were first removed from cement, which is considered an energy-intensive sector in Tunisia. Petroleum product subsidies increased fivefold between 2010 and 2012, and constituted more than 10 per cent of the national budget, equivalent to 7 per cent of GDP, in 2014 (compared with 4 per cent in 2012).

Certain countries have launched successful public-private partnerships, in particular in areas related to infrastructure and industrial ecosystem development, energy production, and water and sanitation management. Mauritania, Morocco and Tunisia have adopted public-private partnerships legislative frameworks. Algeria is formulating a bill on such partnerships and Mauritania adopted a new public-private partnership act in January 2017. Implementation of the strategy for accelerated growth and shared prosperity will take place in accordance with an initial five-year action plan, which will cover the period 2016-2020. The estimated cost of that plan is $11 billion, of which 65 per cent must still be mobilized. To fund the plan, some $2 billion must be mobilized through public-private partnerships. The Government will present the strategy for accelerated growth and shared prosperity at a meeting of the country’s donors and partners in order to mobilize the additional funding needed for its implementation.

Tunisia adopted an act on public-private partnerships in 2015 and a new investment code in 2016. These are expected to support implementation of the country’s new five-year plan, whose overall cost is estimated at $60 billion. Some 40 per cent of that figure will be provided by the State and public enterprises, while the private sector will provide the other 60 per cent. Private investment as a share of total investment is expected to exceed 65 per cent in 2020. An international conference was organized in 2016 to mobilize the funds needed to implement the projects set forth in the country’s development plans.

In Morocco, Act No. 86-12 on public-private partnerships establishes an incentive framework that promotes the use of public-private partnerships in relevant sectors and regulates contracts in accordance with good practices in that area. An interministerial committee on public-private partnerships that reports to the Ministry of Economy and Finance was established in 2015 to provide guidance on the various issues related to public-private partnerships projects. The country’s banking sector is already supporting the implementation of sectoral plans, with particular regard to agriculture, renewable energy and energy efficiency, and has developed specific financial instruments to support companies engaged in sustainable development activities. Furthermore, a road map to help the financial sector support sustainable development was formulated by a group of banking, insurance and financial market institutions in 2016.

---

22 Article 13 of the Public-Private Partnership Act establishes that sustainable development principles should be used to evaluate proposals. The new investment code provides tax incentives for projects that respect the environment and for green investments.
Chapitre 2: Thematic analysis

The six thematic areas addressed in the present report were selected in the light of regional priorities and the strategic interest of countries in regional integration, and on the basis of consultations with AMU. The thematic areas are food security (Goal 2), energy transition (Goal 7), youth and women’s employment (Goal 8), industrialization (Goal 9), climate change (Goal 13) and desertification (Goal 15).

The present chapter first provides an overview of the extent to which the Sustainable Development Goals have been integrated into the countries’ sectoral policies. It then analyses how the indicators pertaining to the six thematic areas evolved between 2010 and 2016, and looks at key policies, programmes and initiatives implemented in each country. Because most strategies do not provide quantitative targets, it has not been possible to develop the analysis further in order to understand the potential risks for the countries if they fail to achieve their national targets by 2020 or 2030. Gaps related to the monitoring and evaluation of public and sectoral policies also limited the scope of the analysis.

2.1 Extent to which the Sustainable Development Goals have been integrated into sectoral policies

For the most part, sectoral strategies formulated prior to the adoption of the Sustainable Development Goals directly or indirectly address a range of Goals. However, few of those strategies stipulate quantitative targets. Furthermore, the timelines for those strategies rarely extend beyond 2020 or 2025. Many strategies have been developed or revised since 2016 without aligning their provisions with the Goals and their targets, while current action plans do not always refer to the Sustainable Development Goal targets.

The process of reviewing and ensuring the alignment of sectoral strategies with the Goals is still its preliminary stages in all the countries. In Algeria, Sustainable Development Goal thematic groups are reviewing the country’s sectoral strategies with a view to setting priority targets. In Tunisia, a January 2017 communication issued by the Ministry of Foreign Affairs called on all sectoral departments to address the Sustainable Development Goals in their strategies, projects and activities and to identify their human resource and capacity-building needs in that regard. In Mauritania, the Sustainable Development Goals addressed by the strategy for accelerated growth and shared prosperity were highlighted in the country’s sectoral strategies.

With regard to food security (Goal 2), the food security strategy of Mauritania, known as Vision 2030, is broadly in line with the targets of Sustainable Development Goal 2, and only the sustainability dimension of agriculture is not explicitly taken into account. The 2016–2025 national agricultural development plan, which was formulated with the support of FAO, incorporates Goal 2, and in particular its target 2.3. With the support of WFP, a national strategic survey of food security and nutrition was conducted in 2017 and a participatory approach adopted that involved all relevant stakeholders. By analysing food and nutrition security, the
survey sought to identify challenges to be addressed and priority strategies that should be implemented in order to achieve Goal 2. The survey highlighted the fact that, even though Mauritania has adopted a legal framework on food security and nutrition, programme implementation, coordination and coherence remain weak. The survey also underscored that inadequate financial resources are allocated to the productive agriculture and livestock sectors and that those resources are well below the 10 per cent target stipulated in the 2003 Maputo Declaration on Agriculture and Food Security in Africa, which was reaffirmed in 2014 in the Malabo Declaration on Accelerated Agricultural Growth and Transformation for Shared Prosperity and Improved Livelihoods.

The survey also revealed that large areas are particularly vulnerable to the impact of climate change and to security-related challenges associated with the flow of refugees from neighbouring countries; early warning and emergency response mechanisms should therefore be established.

Tunisia conducted a similar study, a strategic food security and nutrition review, in 2017. On the basis of that study, it was recommended that action should be taken to develop a multisectoral food security strategy, overhaul the agricultural extension system, foster agricultural entrepreneurship, promote agricultural innovation and develop a national food security index. The Green Morocco Plan adopts a transversal and inclusive approach and promotes issues related to Goal 2, namely land and water resource sustainability, the development of high value-added sectors, the resilience of farmers to climate hazards and enhanced agricultural governance.

With regard to energy (Goal 7), targets 7.1 (access to energy), 7.2 (development of renewable energy) and 7.3 (energy efficiency) are an integral part of the countries’ energy policies. Only Mauritania has yet to adopt a strategy for the development of renewable energy or energy efficiency, and although the strategy for accelerated growth and shared prosperity sets targets for renewable energy, it does not establish targets for energy efficiency.

In terms of employment (Goal 8), both Mauritania and Morocco have adopted national strategies that address youth and women’s employment, but those strategies establish no quantitative targets. In Tunisia, a national employment strategy for the period to 2030 is expected to be formulated in 2017; the Government aims to promote entrepreneurship and private-sector initiatives by young people and women. In Algeria, the country’s employment policies are based on the 2008 plan of action for creating jobs and combating unemployment, which was adopted with the aim of reducing unemployment rates, in particular by supporting productive

---

23 In the Maputo Declaration on Agriculture and Food Security, African Union Heads of State and Government made a commitment to allocate at least 10 per cent of public expenditure to agriculture and to ensure that it was spent effectively and efficiently.

24 The Malabo Declaration on Accelerated Agricultural Growth and Transformation for Shared Prosperity and Improved Livelihoods was adopted in June 2014 by African Union Heads of State and Government, who committed themselves to eradicating hunger in Africa by 2025, doubling current levels of agricultural productivity, halving current levels of post-harvest losses, and adopting social protection initiatives to benefit vulnerable groups within society.

25 Expected support from the European Union will facilitate the formulation of a national renewable energy development strategy in 2018.
investment, human resource development, entrepreneurship, and efforts to combat youth unemployment and update public employment support services.

Industrial diversification and increasing the share of GDP and the number of jobs generated by industry (Goal 9) are key objectives of the countries’ industrial policies. Some of those policies set forth quantitative targets, which can be rather ambitious. Precise numerical targets are not provided for research and innovation, in particular when it comes to investment. Furthermore, the need to address climate-related risk and reduce greenhouse gas emissions (target 9.4) is not explicitly reflected in those strategies.

Climate change (Goal 13) and desertification (Goal 15) are addressed through public policies, national strategies for sustainable development, nationally determined contributions, climate plans, national plans of action to combat desertification and forestry, energy, agricultural, water and other sectoral strategies. Institutional oversight of climate policies and programmes remains a challenge, however. Efforts are therefore still needed to ensure coherence among those frameworks, and in particular among nationally determined contributions, national adaptation plans and the Goals themselves.

A significant challenge is posed by inadequate institutional coordination, a lack of alignment among sectoral strategies and inadequate mechanisms for monitoring and evaluating those strategies and the programmes that they underpin, as this seriously impedes the achievement of the individual Goals.

2.2 Analysis of progress achieved and emerging trends in each thematic area

2.2.1 Food security

Goal 2. Eliminate hunger, ensure food security, improve nutrition and promote sustainable agriculture

| Target 2.1 | Prevalence of food insecurity. |
| Target 2.3 | By 2030, double the agricultural productivity and incomes of small-scale food producers. |
| Target 2.4 | By 2030, ensure sustainable food production systems and implement resilient agricultural practices that increase productivity and production, that help maintain ecosystems, and that strengthen capacity for adaptation to climate change. |
| Target 2.A | Increase investment in rural infrastructure, agricultural research and extension services. |

Relevant issues

Food security and the promotion of sustainable and inclusive agriculture that is resilient to climate change are issues high on the agenda of AMU and its member countries. The Maghreb Strategic Vision for Agriculture to 2030 underlines the important role played by agriculture in the economic and social development of the Maghreb countries, where economic growth mostly shadows the performance of the agricultural sector, which, in 2016, generated 26 per cent of GDP in Mauritania, 12 per
cent in both Algeria and Morocco and 8 per cent in Tunisia. The agricultural sector, the lion’s share of which comprises rain-fed agriculture, is very negatively affected by weather-related hazards. Agricultural employment has fallen in Algeria, Morocco and Tunisia: between 2010 and 2016 it fell from 40 to 38 per cent of the labour force in Morocco, from 10.5 to 7 per cent in Algeria and from 16 to 15 per cent in Tunisia. Only Mauritania recorded an increase, with agricultural employment rising from 22 to 34 per cent over the same period. It must be emphasized that the low productivity of the agricultural sector is closely associated with rural depopulation and skills gaps.

Food security policies must take climate risk into account and set forth steps for enhancing agricultural yields, promoting the efficient and sustainable use of water and land resources, and bolstering the resilience of smallholder farmers. Adaptation of agriculture to climate change is one of the objectives stipulated in all the countries’ nationally determined contributions. To increase the impact of agricultural sector financing, steps must be taken to enhance access to finance, including by broadening access to agricultural sector loans and creating financing instruments that reflect emerging qualitative and technological changes in the sector. Countries also need to boost both public and private investment in agricultural research, which still falls short of international standards and the regional targets established by the African Union and AMU. Moreover, the impact of food security strategies and agricultural policies on rural poverty levels and smallholder farmer incomes should be comprehensively assessed.

Trend analysis

- The prevalence of extreme food insecurity (target 2.1), measured according to the Food Insecurity Experience Scale (FIES), is approximately 12.2 per cent in North Africa (excluding Mauritania, which is considered part of West Africa), compared with 26 per cent in Africa as a whole (FAO, State of Food Security and Nutrition in the World 2017). According to the 2017 working paper by the United Nations Children’s Fund (UNICEF) entitled “Prevalence and correlates of food insecurity among children across the globe”, the prevalence of moderate or severe food insecurity in Middle East and North Africa stands at 29 per cent, while that of severe food insecurity alone stands at 10 per cent.

- Country data indicate that the prevalence of severe or moderate food insecurity is 6.4 per cent in Algeria, 26 per cent in Mauritania, 26 per cent in Morocco and 19 per cent in Tunisia, while the average figure for the 147 countries surveyed in the report is 26.7 per cent. The Maghreb is the only African subregion that achieved the Millennium Development Goal on the eradication of extreme hunger (FAO, Regional Overview on Food Insecurity, 2016). In Mauritania, according to the country’s national food security

26 For Algeria, this figure corresponds to the agricultural sector’s contribution to the country’s GDP including hydrocarbons. The agriculture sector generated 14.9 per cent of non-hydrocarbon GDP in 2016.
27 The rural poverty rate is approximately 26 per cent and may be as high as 30 per cent in certain regions in Tunisia.
28 The report established a baseline for 150 countries using 2014-2016 data from Gallup World Poll surveys for countries that have not yet integrated the FIES methodology into their national surveys, which include all countries in North Africa.
monitoring survey, food insecurity\textsuperscript{29} affected 26 per cent of the population, and 34.7 per cent of the rural population, at some point between 2010 and 2016, with large regional disparities.\textsuperscript{30} This underscores the close relationship between food insecurity and poverty rates, as agriculture is people’s main source of income in rural areas, where poverty rates are higher and where 60 per cent of farmers live below the poverty line. The rate of severe food insecurity stood at 6.4 per cent in 2015, but in June 2012 – a crisis year – it rose to 12.3 per cent.

- According to the 2017 Global Hunger Index,\textsuperscript{31} Mauritania is classified as a country with high levels of food insecurity, Morocco as a country with moderate levels, while Algeria and Tunisia are ranked as countries that suffer low food insecurity rates. In Algeria, the prevalence of moderate or severe food insecurity affected 6.3 per cent of the population in 2014.

- Although household food expenditure decreased between 2010 and 2016 in Mauritania and Morocco, it still represents a high proportion of households’ total expenditure. Thus, in 2014, it stood at 47.9 and 37 per cent of total household expenditure in Mauritania and Morocco, respectively. Expenditure on food was fairly stable in Tunisia and stood at 29 per cent of total expenditure and 39 per cent for those in extreme poverty. In Algeria, it fell from 44.6 per cent in 2000 to approximately 42 per cent in 2011.\textsuperscript{32} In general, expenditure on food is higher in rural areas: it stood at 46 per cent of total expenditure in rural areas of Algeria, for example. The real impact of agricultural policies and programmes in terms of improving smallholder farmer incomes, which remains a major goal for all the countries, has not been documented sufficiently well for an in-depth analysis to be conducted.

- While real progress has been made in recent years to improve cereal production, in particular as a result of improved irrigation systems, production is still not enough to meet ever increasing demand. Despite efforts to improve agricultural growth and productivity (target 2.3), the region remains a net importer of basic food commodities such as cereals and is therefore extremely vulnerable to world food price volatility. The extent to which domestic cereal production can meet demand fluctuates according to climate conditions and, as illustrated in table 1 below, can vary as much as 100 per cent depending on the year.

These fluctuations clearly show that the availability of water is a determining factor for agricultural production in the region, which is increasingly affected by severe drought conditions.

\textsuperscript{29} The prevalence of moderate or severe food insecurity is expressed as the percentage of the population suffering moderate or extreme levels of food insecurity (Food Security Monitoring Survey, conducted periodically by the Committee on World Food Security and WFP).
\textsuperscript{30} The most severely affected regions are those in the south and east of the country, where rates reached as high as 37 per cent in 2015.
\textsuperscript{31} The Global Hunger Index measures the persistence and severity of hunger worldwide. It is calculated on an annual basis by the International Food Policy Research Institute.
\textsuperscript{32} This indicator is based on the results of a household consumption survey, which is conducted in Algeria only every ten years. The most recent survey was carried out in 2011.
Although significant progress has been achieved in recent years, the area of irrigated land remains limited in all four countries. In 2016, 37 per cent of the total usable agricultural area in Mauritania was irrigated, up from 27 per cent in 2010. In Morocco the figure stood at 18 per cent, up from 17 per cent in 2010-2015; in Algeria it was 14.5 per cent, up from 11.7 per cent in 2011; and in Tunisia it was 8 per cent, compared with 7.5 per cent in 2010.

Table 1: Domestic cereal production as a percentage of national requirements (per cent)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>49.3</td>
<td>28.9</td>
<td>24.7</td>
<td></td>
</tr>
<tr>
<td>Mauritania</td>
<td>34.0</td>
<td>34.0 (2014)</td>
<td>45.0</td>
<td>48.9/62.5</td>
</tr>
<tr>
<td>Morocco</td>
<td>56.5</td>
<td>65.1</td>
<td>31.0</td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>42.0</td>
<td>44.0</td>
<td>63.0</td>
<td>61.0/76.0</td>
</tr>
</tbody>
</table>

- Efforts to boost production are also hampered by the preponderance of small-scale family farming. In Morocco, 70 per cent of farms are less than 5 hectares (ha) in size and are located in rain zones characterized by a high climate risk, while in Algeria and Tunisia, 70-75 per cent of farms are less than 10 ha in size. Smallholder farmers lack the necessary capital to modernize their farms. In Morocco, partnerships between the State and national financing institutions have facilitated the development of innovative financing mechanisms, such as the financing company Tamwil El Fellah, that can more effectively help smallholder farmers, who face a number of key challenges related to such factors as the small size and fragmentation of the land areas that they cultivate, low productivity, high vulnerability to climate-related hazards and insecure land tenure regimes. In 2015, following the collapse of the Union of Credit Unions and Savings Societies of Mauritania, which was established to mobilize financial resources for the agricultural sector, the Mauritanian Government established Crédit Agricole de Mauritanie as a subsidiary of the Savings and Development Fund. Access to agricultural credit is also limited in Tunisia, where only 7 per cent of farmers are able to take out bank loans. The number of financial institutions funding projects is on the increase, however. In all the countries, smallholder farmers, who face numerous challenges related to financing and security of tenure, lack the capacity to make sustainable investments with a view to modernizing their agricultural production systems. It is therefore critical to adopt credit policies tailored to the specific needs of smallholder farmers: the indebtedness of many smallholder farmers, in particular in Algeria, Mauritania and Tunisia, constitutes a major impediment to progress.

33 According to statistics provided by the Ministry of Agriculture, Rural Development and Fisheries, the area of land under irrigation increased from 512,740 ha in 2001 (6.2 per cent of the usable agricultural area) to 987,005 ha in 2011 (11.7 per cent of UAA) and was estimated at 1.26 million hectares in 2016 (15 per of the total usable agricultural area).
34 The financing company Tamwil El Fellah grants loans of up to 100,000 Moroccan dirhams through a fund that is underwritten to 60 per cent by the State.
35 The Savings and Development Fund was not established specifically to provide financial support to the rural development sector.
• To address challenges related to water shortages and improve the viability and resilience of food systems (target 2.4), the countries have developed agricultural water-saving programmes and introduced innovative irrigation techniques, such as drip irrigation. In Morocco, the national programme for water exploitation and efficiency in irrigation provided financial support for the installation of drip irrigation systems on 530,000 ha of agricultural land in 2016, equivalent to 31 per cent of the total area of irrigated land in the country and up from 16.6 per cent of irrigated land in 2010 and 28 per cent in 2015.36

• In Algeria, the area of agricultural land irrigated using water-efficient techniques, including sprinkling and drip irrigation, rose sharply from 90,000 ha in 1999 to 600,000 ha in 2016.37 In Tunisia, the area irrigated through the use of water-efficient systems reached approximately 388,000 ha in 2016, equivalent to 89 per cent of the country's total irrigable area (further information is provided at www.apia.com.tn). Organic farming is well established in Tunisia; while it accounted for a mere 300 ha in 1997, organic farming covered nearly 200,000 ha of agricultural land in 2015. Organic farming peaked in 2010, when it accounted for 400,000 ha. Exports of organic products, including organic olive oil, dates and aromatic and medicinal plants, are growing steadily and are helping to reduce the trade deficit. The 2016-2030 national green economy strategy has set a target for organic farming of 1.5 million hectares by 2030. In Morocco, the area of certified organic production is much lower, but increased from 3,600 ha in 2010 to 8,000 ha in 2016. Data for Algeria and Mauritania are unavailable.

• The agriculture orientation index for government expenditures (indicator 2.a.1) is complex to calculate and interpret, on the one hand because it is difficult to ascertain overall public expenditure (including all public aid to the sector), and on the other because of a lack of harmonization among the methodologies used by countries. On the basis of data provided by countries (see table 2), it can be deduced that the index increased significantly between 2010 and 2016, from 0.83 to 1.04, with the implementation of the Green Morocco Plan. The agricultural sector would now benefit from a level of investment that reflects its contribution to total GDP. Assistance provided to farmers through the country’s Agricultural Development Fund represented 38 per cent of total public investment in the agricultural sector between 2008 and 2016. In Algeria, the index also increased slightly, as compared with 2010, but, given the size of its contribution to GDP, the agricultural sector is still not attracting the levels of investment required. Investment in agriculture has also increased in Mauritania, and should continue to rise until 2030, in accordance with the strategy for accelerated growth and shared prosperity. In Tunisia, the share of public investment in agriculture relative to total public investment fell sharply, from 12.7 per cent...
in 2000 to 6.6 per cent in 2010 and 7.4 per cent in 2015, while private-sector investment in agriculture increased by 6 per cent between 2010 and 2015, when it accounted for 65 per cent of total investment in agriculture. The agriculture orientation index for government expenditure in Tunisia is less than 1 and dropped from 0.73 in 2010 to 0.59 in 2012 (FAO, 2012, available at www.fao.org/faostat).

- Agricultural investments have mainly been geared towards the exploitation of natural resources, and in particular towards irrigation, which, on average, accounts for 37 per cent of total investment. Other key areas, such as capacity-building, management and rural infrastructure, have not been given adequate attention. Banking sector investment in agriculture remains low and accounted for only 9.3 per cent of total agricultural investment between 2011 and 2015 and only 17 per cent of private investment (of which 68 per cent is derived from cash flows). As stated above, only 7 per cent of farmers are able to take out bank loans. Banking-sector financing for agricultural projects has improved, however, increasing from 8.3 per cent in 2016 to 10.9 per cent in 2017.

**Table 2: Agriculture orientation index for government expenditure**

<table>
<thead>
<tr>
<th>Country</th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>0.43</td>
<td>0.48</td>
<td>0.46</td>
<td></td>
<td>Insufficient investments</td>
</tr>
<tr>
<td>Mauritania</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>Data unavailable</td>
</tr>
<tr>
<td>Morocco</td>
<td>0.83</td>
<td>0.95</td>
<td>1.04</td>
<td></td>
<td>Morocco is strengthening its agricultural orientation by significantly increasing public sector spending in line with the contribution made by agriculture to the economy.</td>
</tr>
<tr>
<td>Tunisia</td>
<td>0.73</td>
<td>0.59 (2012)</td>
<td></td>
<td></td>
<td>Investments are relatively low when viewed against the contribution made by the agricultural sector to the economy; levels of private investment have increased, however.</td>
</tr>
</tbody>
</table>

- Agricultural research is fundamental to improving productivity and developing sustainable production methods. Public investment\(^\text{38}\) in agricultural research remains limited, however. In Morocco, public investment as a proportion of total investment in the agricultural sector increased from 1.2 per cent in 2010 to 1.7 per cent in 2016 (and peaked at 1.9 per cent in 2015). Data on public investments made in relation to the economic importance of the sector, as reflected in the proportion of GDP generated by agriculture, show, however, that those investments averaged only 0.13 per cent\(^\text{39}\) between 2014 and 2016 – far short of required levels. In Mauritania, agricultural research receives less than 0.1 per cent of

\(^{38}\) There is no data available on private-sector investment, which remains very limited.

\(^{39}\) Research budget of the National Institute for Agronomic Research, including salaries.
investments in the sector, even though the strategy for accelerated growth and shared prosperity envisages annual investments in research of 0.5 per cent by 2030. In Tunisia, expenditures allocated to agricultural research were around 0.64 per cent of agricultural GDP in 2012. No data are available for Algeria. Investments in agricultural research in all countries fall well below the 1-2 per cent of GDP recommended by the African Union, AMU40 and the Organization for Economic Cooperation and Development (OECD). To address that shortfall, new sources of financing will have to be mobilized, in particular in the private sector, whose role remains marginal, including through tax incentives, subsidies, tax credits and regulatory reforms.

In addition, multidisciplinary and multi-stakeholder approaches will need to be developed to improve the coherence and complementarity of agricultural research activities and increase the effectiveness of investments. Lastly, to improve technology transfer, research must go hand in hand with the dissemination of information and scientific innovations.

**Key measures implemented and recent country initiatives**

**Algeria**

Agricultural and food security policy is implemented through the 2010-2014 national plan for agricultural and rural development, the "Felaha 2020 strategy and the 2035 strategy for agriculture, rural development and fisheries. These are supported through a number of financing mechanisms, including the National Fund for Agricultural Development, the National Fund for Rural Development and the Fund for Rural Development and Land Development by Concessions. Other measures have also been developed to facilitate access to land and encourage agricultural activities in less developed areas, including the highlands and the south. Those measures have led to a significant increase in agricultural production. The 2016-2030 new economic growth model and its associated 2015-2019 five-year development plan aim to consolidate the achievements of the country’s agricultural renewal policy, launched in 2009, by strengthening the use of fertilizers and improving irrigation with a view to irrigating 2 million ha (up from 1.2 million ha in 2015), of which a quarter will be set aside for cereal production41. The share of GDP generated by agriculture is expected to reach 20 per cent in 2019. Algeria also aims to increase its total usable agricultural area from the current 8.5 million ha to 10.5 million ha by 2035, and increase the proportion of total irrigated land employing water-efficient irrigation systems to 65 per cent by 2020, as compared with 50 per cent in 2014.

**Morocco**

The 2008-2020 Green Morocco Plan was adopted with a view to enhancing the performance of the agricultural sector, thereby making it an engine of economic growth that can help eliminate poverty. The Plan seeks to double the value of agricultural production, increase agricultural exports, create 1.15 million jobs and significantly

---

40 At a 2008 conference on agriculture in the Maghreb, the African Union and the AMU established targets of 1 per cent and 1.5 per cent of GDP, respectively.

41 The 2035 Strategy for Agriculture, Rural Development and Fisheries aims to increase cereal production to 70 million quintals (as compared with an average of 40 million quintals over the period 2010-2015), by boosting the average yield per hectare from the 2015 figure of 14 quintals to 24 quintals by 2035.
boost incomes. Implementation of the Plan has significantly increased agricultural production,\(^\text{42}\) including by facilitating agricultural mechanization, the use of certified seeds, the installation of improved irrigation systems and the exploitation of public agricultural land.\(^\text{43}\) Efficient water resource management is an integral part of the Plan, and, to that end, Morocco is implementing its national water saving programme for irrigation, which ultimately aims to install drip irrigation systems on 555,000 ha of land currently irrigated by conventional methods, thereby saving 2.4 billion m\(^3\) of water every year.

As part of the Green Morocco Plan, the Government has created a State-subsidized multi-risk agricultural insurance scheme for cereals, pulses and oilseeds, which, in 2016, covered approximately 1 million ha, equivalent to some 10 per cent of the usable agricultural area. The Plan also supports small family farms by seeking to professionalize small-scale farming, develop and promote local products, enhance access to financing mechanisms and agricultural insurance, and encourage the adoption of contractual frameworks among small and large-scale farmers that support collaboration among farms. Such collaboration would facilitate the transfer of skills and technologies, the achievement of economies of scale among smallholders, access to capital markets, and risk sharing.

**Mauritania**

Several donor-supported strategies and programmes aim to improve food security. These include, first and foremost, the national food security strategy for 2015 and for 2030, the 2013–2020 national agricultural investment and food security programme, the 2025 rural development strategy and its integrated rural development programme, the 2016-2025 national agricultural development plan, adopted in 2017, and the 2014 national social protection strategy. The Government has also launched a number of social safety net initiatives for poor and marginalized members of society. These include the Government emergency response programme, known as EMEL,\(^\text{44}\) the school canteen project, the cash transfer programme, free food distribution and the financing of income-generating activities for persons with disabilities. A social register is currently being compiled to facilitate the more effective targeting of these initiatives and ensure that they cover all marginalized groups. It should be noted that the programmes that Mauritania has implemented over the last few decades have failed to reduce food insecurity significantly. Ensuring coherence among those strategies and programmes, strengthening institutional coordination and establishing effective food security programme monitoring and evaluation mechanisms remain key challenges. The lack of an updated and reliable database on agricultural statistics\(^\text{45}\) is another major constraint on decision makers. The 2017 national zero hunger strategic review is expected to enhance implementation of current strategies and programmes and the achievement of relevant targets.

\(^{42}\) Agricultural value added increased from 75 billion Moroccan dirhams prior to 2008 to nearly 126 billion dirhams in 2015.

\(^{43}\) More than 100,000 ha of State-owned land have been leased to private investors at low prices. This has boosted private investment, which accounted for 50 per cent of total aggregate investment (which includes public investment) in 2016.

\(^{44}\) Through its subsidized shops, the EMEL programme sells key foodstuffs to the poor. Originally designed to mitigate the impact of the 2011-2012 drought, it has been extended with a view to addressing the ongoing repercussions of that drought-related crisis.

\(^{45}\) Relevant studies remain incomplete.
The strategy for accelerated growth and shared prosperity aims to increase agricultural GDP to 27.5 per cent by 2020, reduce the prevalence of food insecurity to 11 per cent by 2020 and 5 per cent by 2030, and increase domestic cereal production to cover 49 per cent of the country’s requirements by 2020 and 62 per cent by 2030.

**Tunisia**

Although Tunisia has no specific agricultural strategy, certain sectoral policies and the country’s twelfth development plan, which covered the years 2009-2014, provide a framework for agricultural development. The plan was adopted with a view to strengthening food security, improving agricultural productivity and competitiveness, developing agrifood industries, more effectively exploiting the country’s natural resources, adapting to climate change and adopting an innovative strategy to guide agricultural research. The development of forms of sustainable agriculture that can bolster food security is one of the components of the green economy axis set forth in the country’s latest development plan, covering the period 2016-2020, which aims to increase the annual growth rate of the agricultural sector by an average annual rate of 3.6 per cent between 2016 and 2020, and to increase agrifood exports. The new plan provides, for example, for a programme supporting investments in and the modernization of farms and a number of agricultural development projects to boost agricultural production (in particular the production of cereals), develop and diversify local sectors, create jobs in rural areas and boost farmers’ incomes. Implementation of those projects, which could all strengthen national food security, will require the mobilization of external financial resources. Public-private partnership projects for the development of public land are envisaged under the country’s new State-owned land management and development policy. Private investment has increased in recent years, encouraged by current incentive mechanisms, including favourable fiscal and financial regimes, bonus payments and agricultural land loans, and also by the adoption of the 2016 investment code, which establishes sector-specific incentives. The organic farming sector has been growing steadily thanks to the implementation of a specific national strategy for that sector to the year 2016, a targeted legal framework, accredited quality control and certification mechanisms and the use of favourable tax regimes, subsidies and cost-free certification to incentivize producers. Growth of the sector has also been supported by the establishment of relevant specialized entities, including the Technical Centre for Organic Agriculture, the Sectoral Directorate of Organic Agriculture, the Regional Centre for Research in Horticulture and Organic Agriculture, and the National Federation of Organic Agriculture.

Tunisia has also focused on ways to strengthen the organization of the organic agriculture sector, improve research, training and producer group oversight, and raise awareness of and promote organic products.

Since 2009, the export of organic products has benefitted from recognition of equivalence with the European Union. Tunisia failed, however, to achieve the goal of 500,000 ha under organic cultivation and to double its exports of organic products by the target date of 2016. Moreover, domestic consumption of organic produce remains marginal. The national green economy strategy has set a target for organic

---

47 Organic agriculture has been introduced into the curriculums of agricultural colleges, and a number of specific research programmes have been launched in that area.
farming of 1.5 million ha by 2030 and, in order to fully develop the potential of organic agriculture, Tunisia has adopted a new strategy\textsuperscript{48} with a view to diversifying organic production, preserving the environment, developing biotourism, increasing the value generated by a score of crop, livestock, forestry and aquaculture subsectors, and supporting the export of organic products, in particular to Canada, China, the Russian Federation and the United States of America. The new strategy aims to consolidate progress made in terms of organic agriculture governance, capacity-building of the different stakeholders, control and oversight of organic produce and labelling, and programme monitoring and evaluation. The 2017 strategic food security and nutrition review recommended that action should be taken to develop a multisectoral food security strategy that would address challenges faced by the organic farming sector, including, in particular, the low productivity of farms, the lack of sufficient water and land, the vulnerability of the sector to climate change, the slow pace of the land-title regularization process, insufficient technology transfer and smallholder farmers’ limited access to sources of finance. It should also be noted that the agricultural insurance market constitutes barely 3 per cent of the overall turnover of Tunisian insurance companies.

\subsection*{2.2.2 Energy transition}

\textit{Goal 7. Ensuring access to affordable, reliable, sustainable and modern energy for all}

- \textbf{Target 7.1} By 2030, ensure universal access to affordable, reliable and modern energy services.
- \textbf{Target 7.2} By 2030, increase substantially the share of renewable energy in the global energy mix.
- \textbf{Target 7.3} By 2030, double the global rate of improvement in energy efficiency.

\textbf{Relevant issues}

AMU member countries share the common objective of ensuring widespread access to modern and sustainable energy services at affordable prices. National energy policies focus on strengthening electricity generation capacity, diversifying the energy mix by increasing the share provided by renewable energy, meeting demand through the adoption of innovative energy consumption modelling, increasing local industrial content, reducing greenhouse gas emissions and promoting regional integration.

The availability of energy resources differs from country to country. Algeria, an oil and gas exporting country,\textsuperscript{49} had a low energy dependence rate of approximately 6.9 per cent in 2016, while the dependence rate for Morocco stood at 93 per cent. Tunisia, which until 2001 was a net exporter of oil, witnessed a steady decline of approximately 7 per cent per year in its primary energy sources, which fell from 7.8 million tons of oil equivalent (MTOE) in 2010 to 5.4 MTOE in 2016.\textsuperscript{50} The energy independence rate fell from 94 per cent in 2010 to 72 per cent in 2013 and to 56 per cent in 2015, before rising slightly to 59 per cent in 2016. In Mauritania, oil

---

\textsuperscript{48} National strategy for the development of organic agriculture by 2020.
\textsuperscript{49} Oil and gas exports generate 60 per cent of the national budget and 97 per cent of the country’s foreign earnings. The country’s energy dependence rate in 2016 was approximately 7 per cent.
\textsuperscript{50} Average oil production declined from 80,000 barrels per day in 2010 to 45,000 barrels per day in 2016. Source: Ministry of Energy, Mines and Renewable Energy.
production remains marginal, with the country producing less than 5,000 barrels a day. Mauritania is not expected to begin producing offshore gas before 2021.

The countries have made significant investments in recent years to develop their electricity generation, transmission and distribution capacities with a view to addressing the sustained growth in electricity demand in the subregion, which is increasing, on average, at an annual rate of 10 per cent in both Mauritania and Algeria, 4 per cent in Tunisia and 2.9 per year in Morocco. In Mauritania, the installed electricity generation capacity of the Mauritanian electricity company (SOMELEC) increased by 80 per cent between 2007 and 2015, from 475 million kW to 749 million kW. In Algeria, it increased by 136 per cent between 2004 and 2014, from 6,753 MW to 15,957 MW. In Morocco, the total installed capacity increased to 8,261 MW in 2016, (34 per cent of which was derived from renewable sources, including hydro, solar and wind power generation) from 7,994 MW in 2014. In Tunisia, it increased from 4,024 MW in 2011 to 5,224 MW in 2015.

Electricity production is still heavily dependent on fossil fuels, including oil, natural gas and coal. All the countries have significant renewable energy potential, however, in particular solar and wind power, which could meet the subregion’s entire electricity needs by 2050 while also promoting job creation, scientific research, industrialization, and new commercial opportunities.

To exploit that potential to the full, the countries have set themselves ambitious targets and are implementing key programmes and carrying out institutional reforms which provide, among other aims, for the creation of implementing agencies and research institutions. They are also amending their regulatory frameworks; Algeria, Morocco and Tunisia, for example, have adopted specific legislation on renewable energy development and energy efficiency, while Algeria has also passed legislation on feed-in tariffs. The countries are also collaborating with relevant stakeholders in the financial, industrial and technological fields. Public sector stakeholders continue to play a significant role in both Algeria and Tunisia, however, despite the creation by those countries of fairly liberalized regulatory environments. The absence of effective strategic and regulatory frameworks in Mauritania continues to discourage private-sector engagement.

Increasing the use of renewable energy is a key component of the Maghreb countries’ energy transition strategies. It broadens access to energy services, fosters economic growth, supports the creation of local value added in the energy sector, creates jobs and supports access to health-care and educational services.

The Maghreb countries should adopt policies and programmes that promote inclusivity through energy transition so as to ensure that the development and exploitation of

---

51 The rate of increase in electricity requirements in Morocco was 6 per cent lower between 2015 and 2016 than between 1999 and 2010, owing to slowing economic growth and the impact of energy-efficiency measures.
52 Source: government energy policy, 2015.
53 In both Algeria and Tunisia, between 95 and 97 per cent of electricity is generated from natural gas, while in Morocco it is generated primarily from a mix of coal, natural gas and oil (which accounts for some 80 per cent of the mix). In 2012, 47 per cent of Tunisia’s energy requirements were generated from natural gas imported from Algeria.
innovative energy sources provide affordable access to energy for all groups within society, in particular those living in remote rural areas.

The World Economic Forum Global Energy Architecture Performance Index Report 2017\(^{54}\) ranked Morocco fifty-seventh out of 127 countries; Tunisia and Algeria were ranked sixty-fifth and eighty-first, respectively. Morocco was also ranked first in the Middle East and North Africa region and second in Africa.

**Trend analysis**

- Access to electrification is almost universal and approaching 100 per cent in Tunisia, Algeria and Morocco. Electrification rates remain low only in Mauritania:\(^{55}\) access in that country stood at only 38.8 per cent at the national level in 2014, and at only 10 per cent in 2016 in rural areas, which are often sparsely inhabited and where communities are widely dispersed. The electrification of rural areas has increased significantly in the other three countries, where rural access to electricity now stands at over 99 per cent.

- Power generation from renewable energy sources has undergone significant development in recent years, in particular in Mauritania and Morocco, which have implemented ambitious programmes in that area. In Mauritania, the proportion of total electricity generation produced from renewable energy sources increased from 2.6 per cent in 2012 to 17.4 per cent in 2015. That figure excludes hydropower, which provided 13.8 per cent of total electricity; in 2016, total renewable power generation including hydropower was approximately 37 per cent of total power generation. In Morocco, renewable power accounted for 16.2 per cent of total power generation in 2013 and 34 per cent in 2015. Some 800 MW, equivalent to 12 per cent of total power output, were produced in 2015 by wind and solar power generation.\(^{56}\) Of the 770 MW of wind turbines in place by the end of 2014, 200 MW were installed by the private sector. A development plan for medium-sized photovoltaic power plants, which can generate between 20 MW and 30 MW, is now being formulated with the aim of boosting total installed photovoltaic capacity to 500 MW. In Algeria, hydro and solar power generation provided 0.8 per cent of electricity nationally in 2012 and 2 per cent in 2016, with renewable electricity generation reaching 400 MW that year. That figure includes 150 MW, including 25 MW from solar power, generated by the Hassi R’mel solar-gas hybrid power station, 1.1 MW generated by the Ghardaïa pilot solar plant, 10 MW generated by the Adrar wind farm, and 343 MW generated by 23 photovoltaic power stations. A 4,050 MW solar photovoltaic project was to be launched in 2017. In Tunisia, the share of electricity produced from renewable energy

---

\(^{54}\) The index assesses three key axes, namely economic growth and development, environmental sustainability, and access to energy and security.

\(^{55}\) According to a World Bank survey conducted in 2014, access to electricity is the second most important constraint faced by companies after access to finance.

\(^{56}\) Solar energy provides 2 per cent (Ministry of Energy, Mines and Sustainable Development. See: www.mem.gov.ma).
sources, including hydro, wind and solar photovoltaic power generation, increased from 1.6 per cent in 2013 to 3 per cent in 2015. Renewable energy power generation excluding hydropower increased from 55 MW in 2009 to 154 MW in 2010 and to 280 MW in 2015, with wind power generation accounting for 245 MW and solar photovoltaic generation (which increased significantly following implementation of the “Solar Roofs” programme in 2009) accounting for 35 MW.

- Total energy intensity has declined significantly in Tunisia, falling by approximately 2 per cent per year between 1990 and 2011. Energy intensity was estimated at 0.416 tons of oil equivalent (toe) per 1,000 Tunisian dinars (D) of GDP in 1990 but fell to 0.306 toe per D1,000 of GDP by 2011. It then remained relatively stable between 2011 and 2016, and was estimated at 0.312 toe per D1,000 of GDP in 2016. In Algeria, total energy intensity increased by an average of 0.8 per cent per year between 2000 and 2015. According to data provided by the agency for the promotion of the efficient use of energy, APRUE, energy intensity currently stands at 0.591 toe per $1,000 of GDP at constant prices excluding hydrocarbons, and at 0.357 toe per $1,000 of GDP at constant prices including hydrocarbons. As for Morocco, after having recorded an increase in energy intensity of approximately 0.95 per cent per year between 2000 and 2010, that country successfully reversed that trend between 2010 and 2015 following its implementation of strategic, institutional and regulatory measures. Energy intensity data for Mauritania are unavailable.

**Key measures implemented and recent country initiatives**

**Algeria**

The 2015-2030 national renewable energy development programme aims to boost renewable energy power generation to approximately 22,000 MW or 27 per cent of the country’s total power generation. The programme focuses primarily on the development of photovoltaic and wind power generation, and on the introduction of biomass, cogeneration, geothermal and solar thermal power generation technologies. It also provides support for the establishment of domestic manufacturing industries that can produce equipment and components for solar photovoltaic power plants. To support the development of that sector, calls for tender issued by the Government now stipulate that components must be manufactured within the country. At present, only two solar photovoltaic panel manufacturing plants have been established, with production capacities of 30 MW and 50 MW.

Algeria has also established a national fund for energy management, renewable energy and cogeneration, which is replenished on an annual basis, including through a 1 per cent oil royalty. A solar energy cluster, which brings together relevant companies,
institutes and research centres, together with representatives of ministries concerned with energy and industry, was created in 2017 to boost the production capacity of certain components used in solar technology value chains.

The renewable energy sector is governed by Act No. 04-09 of 14 August 2004 on the promotion of renewable energy in the context of sustainable development. An incentive mechanism based on 20-year guaranteed feed-in tariffs was introduced in 2014 to encourage national and international investors from the public and private sectors to participate in the implementation of the national renewable energy development programme. Further measures are envisaged, including land transfers for the symbolic price of one dinar, exemptions from taxes and duties, and interest subsidies on bank loans. Economic stakeholders are discouraged from investing in the sector, however, by energy subsidies, which total almost 10 per cent of GDP, and there are currently no independent power producers in the country. Although the 2018 Finance Act does not provide for any increase in electricity tariffs, plans for the reduction of energy subsidies are reportedly being formulated.

Given the importance of energy efficiency, Algeria is implementing its 2015-2030 national energy-efficiency programme with the aim of reducing overall energy consumption by 9 per cent and developing local industries that can manufacture high-performance light bulbs, solar water heaters and thermal insulators. The programme aims to promote energy efficiency in construction, transport, industrial and public lighting. Over the long term, it will provide for the thermal insulation of 100,000 homes per year, the distribution of 10 million low-energy light bulbs, the distribution of solar water heaters with a total capacity of 200,000 m² per year and the conversion of 1.3 million passenger vehicles to run on liquefied petroleum gas. Implementation of the programme is supported by the national fund for energy management, renewable energy and cogeneration and by an appropriate legislative framework. The programme also establishes a number of incentives, including reduced customs duties and value-added tax on equipment used in the field of renewable energy and energy efficiency, which is regulated by Act No. 99-09 of 28 July 1999 on energy management.

The industrial energy-efficiency programme includes a range of incentives, including support for energy audits, financing and low-interest loans for specific studies and the purchase of energy-efficient equipment, and the conclusion of voluntary agreements between the State and companies pursuant to which those companies agree to promote energy efficiency and reduce their greenhouse gas emissions: in exchange for making a commitment to achieve quantitative energy saving targets over a period of three to five years, those companies receive support from APRUE to facilitate implementation of their action plans.

Training sessions and awareness-raising programmes are also held to facilitate efforts by industrial firms to improve their energy efficiency.

---

62 This rate is applied to photovoltaic installations generating 1 MW or more.
**Morocco**

The national energy strategy for 2009 to 2030 aims to reduce energy dependence to less than 82 per cent in 2030; to increase the share of installed electrical power provided by hydro, solar and wind power to 42 per cent, equivalent to 6,000 MW, by 2020 and to 52 per cent by 2030; to reduce energy consumption by 12 per cent by 2020 and by 15 per cent by 2030; and to integrate Morocco into African and Euro-Mediterranean energy networks. A total of $30 billion is expected to be invested in renewable energy projects between 2016 and 2030. Wind and solar programmes are implemented through public-private partnerships and a minimum local industrial content rate of 30 per cent is stipulated in the specifications for the implementation of renewable energy programmes. Power generation from renewable energy sources has been liberalized pursuant to Act No. 13-09, as supplemented by Act No. 58-15 on renewable energy and Act No. 54-14 on self-generation. A 2017-2019 programme for the development of private-sector small hydropower plants generating more than 100 MW is being implemented pursuant to the Renewable Energy Act. A Moroccan sustainable energy agency was created in 2016 and an energy development fund established. State subsidies to the energy sector, which, in 2013, accounted for 6 per cent of the national budget, are being gradually reduced and State subsidies on petroleum products were eliminated in 2015; only butane, the fuel most commonly used by households, remains heavily subsidised.

An energy-efficiency strategy for the period 2014-2030 and numerous energy-efficiency programmes are being implemented. These include a national programme for the installation of solar water heaters, a programme to promote the use of low-energy light bulbs, industrial energy-efficiency programmes that establish energy audit requirements for energy-intensive industries and provide support for the voluntary adoption of ISO 50001 on energy management systems, energy-efficiency initiatives in the transport sector, including an import ban on vehicles over five years old and a reduction in customs duties to 2.5 per cent for hybrid vehicles, and energy-efficiency initiatives for the building sector, public lighting and agriculture.

The long-term objectives of the country’s energy-efficiency strategy include reducing overall energy intensity by 1.3 per cent per year, national energy consumption by 25 per cent, energy consumption in the building industry and the transport sector by 20 per cent and 35 per cent, respectively, as well as reducing energy intensity in the industrial sector by 2.5 per cent per year and in agriculture and fisheries by 0.2 per cent per year. Morocco has adopted the Energy Efficiency Act No. 47-09 and established a progressive pricing regime. It also established the Energy Efficiency Agency in 2016 and is in the process of establishing an energy-efficiency fund. A

---

63 28 per cent of which is to come from wind and solar energy.
64 40 per cent of which is to come from wind and solar energy.
65 Act No. 54-14 allows large self-generators of electricity whose capacity requirements exceed 300 MW to develop their own production capacities.
66 Butane consumption increased from 1.7 to 2.33 million tons between 2008 and 2016, representing an average annual growth rate of 4 per cent.
67 The PROMASOL programme aims to increase capacity from the current figure of 300,000 m2 to 1.7 million m2 by 2020.
68 A general energy-efficiency code and thermal regulations for the building sector.
69 A national programme for the promotion of solar pumping systems, a pilot programme on optimizing the energy performance of agricultural holdings, and efforts to identify energy-efficiency and renewable energy measures applicable to the sector.
programme to facilitate the establishment of training institutes for renewable energy and energy-efficiency professions has been launched and a first training institute has opened in Oujda. To promote research, a “green energy park” complex was established in 2014. National banks are, moreover, increasingly involved in financing energy-efficiency projects.

**Mauritania**

The energy vision of Mauritania has been adopted with a view to ensuring universal access to reliable, modern and affordable energy services. Nationally, household access to electricity is expected to reach 70 per cent in 2020 and 85 per cent in 2030. In rural areas it is expected to reach 40 per cent in 2020. To achieve that goal, significant efforts must be exerted to increase production capacity by diversifying the energy mix and by increasing the contribution made by renewable energy in national electricity generation by SOMELEC. It is envisaged that the proportion of power generated from renewable energy sources will rise from 37 per cent in 2016 to 50 per cent by 2020 and to 70 per cent by 2030. The country’s energy vision also focuses on the export of electricity to other OMVS member States. A feasibility study on how to link the electricity grid to the grid in southern Morocco by 2020 is now under way.

Mauritania has so far favoured a project-based approach, and the majority of projects are financed by partners abroad. The financial contribution made by the private sector is marginal because of the lack of a clear strategic vision, the limitations of the existing regulatory framework and the lack of appropriate financing mechanisms. A strategy for the development of renewable energy is currently being formulated. Proposed amendments to the Electricity Code, which should take into account the specific needs of the renewable energy subsector, and the adoption of the Public-Private Partnerships Act could further enhance the engagement of the private sector. Momentum in that area should be sustained through the development and adoption of a national energy-efficiency strategy and programme of action. The strategy for accelerated growth and shared prosperity fails to provide any indicators in that strategic area. Mauritania is a stakeholder in the Regional Off-Grid Electrification Project, which is funded by the World Bank and implemented by the Economic Community of West African States Centre for Renewable Energy and Energy Efficiency. The Project aims to strengthen access to sustainable electricity services through the installation of stand-alone solar power generation systems and to encourage private-sector initiatives in that field.

**Tunisia**

In 2016, Tunisia adopted its 2030 energy strategy to facilitate efforts to meet the growth in electricity demand, reduce the consumption of imported gas, support the economic and social development of regions and help to limit greenhouse gas emissions. The strategy aims to increase electricity generation capacity, diversify energy sources, increase the proportion of electricity generated from renewable energy sources (excluding hydropower) to 12 per cent by 2020 and to 30 per cent,

---

70 Some 80 per cent of electricity is generated by conventional thermal power generation.
71 Organization for the Development of the Senegal River.
72 Objective of the 2016–2020 five-year development plan.
equivalent to 3,815 MW, by 2030.\textsuperscript{73, 74} and to reduce final energy intensity by 3 per cent per year and greenhouse gas emissions by 41 per cent by 2030.\textsuperscript{75}

Those objectives are in line with the goals outlined in the country’s 2016-2020 five-year development plan and its green economy strategy. The energy strategy also focuses on strengthening cooperation among Maghreb countries, including in the areas of training, research, and technology transfer. In order to promote private-sector investment, a process to phase out hydrocarbon subsidies began in 2013. Energy subsidies had totalled some 4 per cent of GDP in 2012 and had risen to 8 per cent by 2014.

The strategy is being implemented through three key initiatives:

- The 2017-2020 renewable energy electricity production programme, which aims to boost capacity by 1,000 MW, of which one third is to be generated using wind power and two thirds using solar photovoltaic generation. Two thirds of that additional energy will be produced by the private sector\textsuperscript{76} and one third by the Tunisian electricity and gas corporation, STEG;\textsuperscript{77}

- Act 12–2015 on the production of electricity from renewable energy sources and its implementing decree No. 2016-1123, which establish terms and conditions for the production and sale of electricity from renewable energy sources. The Act broadens the scope of the term self-generator to include local authorities, public-sector enterprises and private-sector companies, and allows for any surplus electricity produced to be resold to STEG;

- The energy transition fund,\textsuperscript{78} which is expected to become fully operational in 2018. At present only the grant component of the fund is operational. The fund will support small and medium-sized renewable energy projects. A request for the fund to be considered eligible for Green Climate Fund support has been submitted.

Controlling energy demand is a longstanding concern for Tunisia. Policies in this area have been supported and implemented through an institutional framework, a series of regulations that are currently being updated, programmes to reduce energy use and improve energy efficiency in the industrial, construction and transport sectors, financial incentives, the establishment of a national energy management fund and regulations requiring energy-intensive companies that consume more than 800 toe in energy to undergo energy audits. The PROSOL thermal energy programme has facilitated the installation of nearly 778,000 m\textsuperscript{2} of solar thermal collectors for domestic hot water heating, with the penetration rate reaching 70 m\textsuperscript{2}/1,000 inhabitants by

\textsuperscript{73} Objective of the Tunisian solar energy strategy to 2030.
\textsuperscript{74} Source: ANME; see www.anme.nat.tn.
\textsuperscript{75} Intended nationally determined contribution objective.
\textsuperscript{76} Private-sector generation will be authorized through the granting of licences for generation of up to 30 MW for wind power and up to 10 MW for photovoltaic solar power and the granting of concessions for power generation of more than 30 MW for wind power and more than 10 MW for photovoltaic solar power.
\textsuperscript{77} Although the market for electricity generation was liberalized in 1996, STEG still produced 81 per cent of installed electrical power in 2016.
\textsuperscript{78} The energy transition fund replaces the 2005 national energy management fund.
late 2016. As a result of all those efforts, Tunisia was ranked nineteenth in the 2016 World Bank report on Regulatory Indicators for Sustainable Energy (RISE).

The Alliance of Tunisian Municipalities for Energy Transition, a programme that supports the energy transition of municipalities, is currently being implemented, as is a programme to help companies obtain ISO 50001 certification, which will provide support to approximately 350 companies between 2017 and 2020.

### 2.2.3 Youth employment

**Goal 8. Promote inclusive and sustainable economic growth, employment and decent work for all**

<table>
<thead>
<tr>
<th>Target 8.5</th>
<th>By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target 8.6</td>
<td>By 2020, substantially reduce the proportion of youth not in employment, education or training.</td>
</tr>
</tbody>
</table>

**Relevant issues**

In all the countries, access to employment is a major challenge, in particular among young people, women and college graduates. Youth unemployment, which is of a structural nature, has exacerbated insecurity and instability in those countries. The female labour force participation rate is estimated at only 24.5 per cent in Morocco, Mauritania and Tunisia and 15.5 per cent in Algeria, and there are significant unemployment disparities between women and men. Interregional disparities between women are also notable. In Tunisia, for example, the national female unemployment rate was estimated at 23.5 per cent in 2016, but more than 35 per cent in certain parts of the country's interior.

Economic growth remains fragile and is insufficient to trigger a significant and sustainable reduction in unemployment. The limited diversification of national economies, the low value added of productive sectors, the large informal sector, which accounts for 37 per cent of the working population in Morocco and 68 per cent in Mauritania, rapid demographic change, the inadequacy of education and vocational training systems and limited labour market data all hinder the creation of sustainable and decent employment. The predominance of low-skilled jobs is due to the structure of the countries' economies and the limited productivity of its sectoral components. The primary and tertiary sectors of the economy remain the main driving forces of economic growth.

While education systems remain inflexible, scientific and technological advances mean that new skills are needed in the job market, in particular as the private sector is the main source of employment in certain countries. The private sector provides 58 per cent of jobs in Algeria and nearly 90 per cent of jobs in Morocco. Measures to improve the quality of education and training systems and ensure that the skills taught match the needs of business and industry are crucial if the countries are to ensure the
employability of their working populations and significantly reduce unemployment. Lastly, supporting economic activity and improving the living conditions of rural populations would reduce urban unemployment by reversing migration flows from urban to rural areas. Local development plans must therefore endeavour to create jobs.

Public policies and programmes supporting youth employment in recent years have failed to stem the increase in youth unemployment. There are still too few employment opportunities to meet the demand for jobs and available job opportunities are often incompatible with applicants’ skills profiles. Other constraints include the uneven geographical distribution of employment opportunities and insufficient data on local labour supply and demand, in particular as most young people in rural areas do not register with employment agencies.

Given the lack of evaluations and impact studies of the numerous public initiatives that have been implemented, it is difficult to assess the impact of those initiatives on unemployment and on the creation of sustainable jobs. There is, moreover, insufficient information and follow-up on those receiving support through youth entrepreneurship mechanisms. The capacities of support structures must be strengthened. In addition, the multiplicity of stakeholders in this area, a lack of coordination among the various programmes, the fact that financial resources are often insufficient and widely dispersed, and the absence in certain countries of regular monitoring and evaluation mechanisms hinder the sustainability of job creation initiatives and limit their impact. An analysis of the impact of macroeconomic and sectoral policies on employment should also be conducted.

**Trend analysis**

- Unemployment (indicator 8.5.2) remains high in all countries, but particularly so in Tunisia, where it stood at 15.6 per cent in 2016. According to estimates by the National Institute of Statistics, the national unemployment rate in the third quarter of 2017 was 15.3 per cent. The female unemployment rate was 22.8 and the male unemployment rate 12.3 per cent. Unemployment rose in Morocco from 9.1 per cent in 2010 to 9.9 per cent in 2016 and to 10.2 per cent in 2017, whereas it dropped slightly in Mauritania, from 12.85 per cent in 2014 to 11.8 per cent in 2016. Unemployment fell significantly in Algeria between 2005 and 2010, from 15.3 per cent to 10 per cent, remained relatively stable at between 10 and 11 per cent between 2010 and 2016 and has since risen and was estimated at 11.7 per cent in September 2017. In Mauritania, no significant decrease in unemployment is expected before 2030, when it is expected to stand at 10 per cent. Morocco has established more ambitious targets in that area and aims to reduce unemployment to 8.5 per cent by 2021. As envisaged in its 2016-2020 economic and social development plan, Tunisia aims to reduce the unemployment rate to 12 per cent by 2020.

---

79 According to estimates by the National Institute of Statistics, the national unemployment rate in the third quarter of 2017 was 15.3 per cent. The female unemployment rate was 22.8 and the male unemployment rate 12.3 per cent.
81 2017-2021 Government Programme.
• The youth unemployment rate, namely, the unemployment rate for those aged 15-24, has increased since 2010 in Algeria, Morocco and Tunisia. It reached 28.3 per cent in Algeria in September 2017, and 22.5 per cent and 34.9 per cent in Morocco and Tunisia, respectively, in 2016. According to data from the latest national survey conducted in Mauritania, youth unemployment in that country fell from 31 per cent in 2015 to 22.9 per cent in 2016. That significant drop is due in part to changes in the methodology, including with regard to sampling and aligning nomenclature with international standards, used in the national survey on employment and the informal sector. The 2015 figure, which is taken from the 2013 general population and housing census, is the figure used in the strategy for accelerated growth and shared prosperity.

• Unemployment among women is another concern, in particular in Tunisia, where the female unemployment rate stands at 23.5 per cent versus 12.5 per cent for men, in Algeria, where it stands at 20 per cent versus 8 per cent for men, and in Mauritania, where it stands at 19 per cent versus 9.92 per cent for men. In Morocco, it rose from 10.9 per cent in 2016 to 14.7 per cent in 2017. In Algeria, it declined from 19 per cent in 2010 to 16.6 per cent in 2015 before rising again in 2016.

• The unemployment rate of college graduates (indicator 8.5.2) is rising in all the countries. In 2016, it stood at 30.5 per cent in Tunisia, 21.9 per cent in Morocco, 18 per cent in Mauritania (2014 figures) and 17.7 per cent in Algeria (as against 14 per cent in 2015 but 21 per cent in 2010). This is mainly due to the poor performance of education and vocational training systems and their failure to teach the skills and competencies needed by companies.

• The proportion of young people (those aged 15-24) who are not in education, employment or training (indicator 8.6.1) is also worrying. In Mauritania, according to the 2016 national survey on employment and the informal sector, 44.2 per cent of those aged between 15 and 34 are neither employed nor in education or training. In Morocco, some 29 per cent of young people between the ages of 15 and 24 are neither in employment, nor in education or training. In Tunisia, that figure was 31.6 per cent in 2016.

• The existence of a developed and operationalized national strategy for youth employment, as a distinct strategy or as part of a national employment strategy (indicator 8.b.1).

Although the national employment strategies of all the countries focus on young people and women, they fail to establish targets for youth unemployment reduction.

82 The 2017 National Employment Survey revealed a rising rate that stood at 26.5 per cent in 2017.
83 2017 National Survey on Employment and the Informal Sector, conducted by the National Statistical Office with the support of ILO.
84 2016 data.
Those strategies focus, primarily, on promoting private-sector employment and entrepreneurship, improving women’s labour force participation rates and reducing job insecurity.

<table>
<thead>
<tr>
<th>Country</th>
<th>Current strategy</th>
<th>Focus of the strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>2008 plan of action for creating jobs and combating unemployment, adopted in 2008 and amended in 2014.</td>
<td>Improving the skills of the national workforce, promoting entrepreneurship, updating training courses and curriculums in order to meet labour market needs, improving and consolidating labour market intermediation, supporting job-creating investment and updating monitoring, control and evaluation mechanisms.</td>
</tr>
<tr>
<td>Morocco</td>
<td>2015-2025 national employment strategy</td>
<td>Based on four pillars: adapting macroeconomic and territorial policies with a view to creating new employment opportunities and creating an average of 200,000 jobs per year; developing human capital; improving the effectiveness of employment programmes; and strengthening labour market governance. Youth employment is a component of the national employment strategy, which also aims to reverse the downward trend in the female labour participation rate and increase participation for women aged 25 and over from the current rate of 30 per cent to 44 per cent by 2025. An implementation plan for the national employment strategy was adopted in 2017.</td>
</tr>
<tr>
<td>Mauritania</td>
<td>2017-2030 national employment strategy</td>
<td>Primary focus on women, young people and those who have completed only primary or only secondary education. Addressing and monitoring employment at sectoral level. Increasing investment in mechanisms that facilitate access to employment, promoting coordination and consultation among public mechanisms and bodies addressing employment and labour market issues. Reducing the proportion of workers in precarious and insecure employment from the current 20 per cent to 15 per cent.</td>
</tr>
<tr>
<td>Tunisia</td>
<td>Five-year development plan</td>
<td>The process of developing a national employment strategy for 2030 began in 2017. That strategy will focus on promoting employment in the private sector encouraging innovation among young people. Government employment priorities include the promotion of entrepreneurship and private-sector initiatives led by women and young people.</td>
</tr>
</tbody>
</table>

**Key measures implemented and recent country initiatives**

**Algeria**
In response to the failure of various economic sectors, in particular agriculture and industry, to create sufficient numbers of jobs, the Algerian Government has established a number of mechanisms to promote youth employment, and those mechanisms
have helped to reduce the unemployment rate and encourage entrepreneurship and self-employment. According to figures provided by the National Statistics Office, the employment rate for 15-24 year olds rose from 16.7 per cent in 2001 to 21 per cent in 2015. Some 70 per cent of the national demand for jobs comes from first-time job seekers, of whom 30 per cent are women. Some 40 per cent of the total number of job seekers in 2014 were young people aged 15-24. The private sector remains the main source of employment and provided 59 per cent of total employment in 2016. The sectors in which there is greatest demand for workers include construction, industry, agriculture and services. The employment survey published by the National Statistics Office in 2013 revealed that 88 per cent of those aged 15-24 who were employed in the private sector were not registered in the social security system. In 2016, the proportion of workers who were not registered in the social security system stood at 39.5 per cent of the total employed population.

A national unemployment reduction policy was initiated in 2008 and strengthened through the implementation of dedicated mechanisms and services by public agencies such as the National Employment Agency, the National Unemployment Insurance Fund, the National Youth Employment Support Agency, the Social Development Agency and the National Microcredit Agency.

Key measures taken to help reduce unemployment and facilitate the integration of unemployed young people into the labour market include measures to support the integration into the labour force of university and vocational college graduates, strengthen the skill sets of young first-time job seekers, facilitate the establishment of innovative microenterprises and projects that employ young people and women, and to establish unemployment insurance schemes. Between 2010 and 2015, the vocational integration assistance scheme placed more than 1.5 million young people in jobs. More than 878,000 jobs were created between the establishment of the National Youth Employment Support Agency in 1996 and late 2016. Other measures have also helped boost employment, including, in particular, the legislative framework on investment provided in Act No. 16-09 of 2016 and its accompanying decree No. 17-105 of March 2017, which provides financial incentives to those making investments that create more than 100 jobs. It remains difficult, however, to assess the true effectiveness of the various measures taken, including the sustainability of the activities financed, the quality and duration of the jobs created, and the extent to which jobs are created for the most vulnerable sectors in society, in the absence of formal evaluations by relevant authorities. Analyses that have been conducted suggest, however, that 79.5 per cent of the jobs created through the various schemes and measures are only temporary. Some 69.7 per cent of those jobs are salaried positions but the creation of stable medium-term and long-term employment opportunities remains a challenge.

**Morocco**

The 2015-2025 national employment strategy was adopted to promote the creation of decent jobs, the participation of young people and women in the labour market, the development of human capital, and the reduction of territorial and gender inequalities in terms of access to employment. The strategy envisaged a reduction in the unemployment rate to 3.9 per cent by 2025, but that very ambitious target was revised upwards to 8.5 per cent in the new 2017-2021 national job creation plan.
The promotion of youth employment is a component of the national employment strategy. Employment also lies at the heart of the 2015-2030 National Youth Strategy, which provides, among other measures, for steps to be taken to enhance the employability of young people and increase the economic opportunities available to them, in particular in rural areas.

Several public employment support programmes focus on improving employability by encouraging skills training and providing support to emerging economic sectors. The programmes also aim to promote paid employment by encouraging the use of youth employment contracts and supporting entrepreneurship. The impact of those programmes remains difficult to assess, but they are often inefficient because of their relatively high cost and insufficient focus, and the lack of institutional coordination and local stakeholder engagement. In addition, the employment statistics system needs to be strengthened, at both the sectoral and local levels.

The 2017-2021 national job creation plan aims to reduce the unemployment rate to 8.5 per cent, to combat job precariousness and to address the needs of vulnerable groups, including young graduates, persons with disabilities and women. The approach adopted should strengthen coordination and dialogue among relevant sectoral and regional level stakeholders and facilitate the implementation and enhance the impact of current programmes in that area, including the 2016–2020 Action Plan formulated by the National Agency for Employment and Skills Promotion, which helps graduates obtain their first job, provides a range of services for those lacking suitable qualifications and seeks to enhance women’s labour force participation, including by promoting the establishment by women of microenterprises and other income-generating activities.

The 2017-2021 National Job Creation Plan should also promote convergence between labour market needs and the skills provided by the education sector, strengthen regional employment promotion programmes, improve the impact of sectoral policies on employment,86 in particular when 60 per cent of jobs are created in the service sector, strengthen the role of the National Labour Market Observatory and develop an integrated labour market monitoring system. A national employment survey was conducted in 2017. That survey used a large sample size in order to enhance its accuracy and geographical coverage, compiled labour market information from the 12 regions and collected data pertinent to the relationship between skill sets and occupations, the situation of women in the labour market, types of self-employment, the enrolment of workers in medical insurance and pension schemes, how workers travel to work, wage inequalities, the use of innovative information and communication technologies and the skill sets of immigrants living in the country.

The 2017 employment survey, which was conducted by the High Commission for Planning, highlighted challenges related to the creation of high-quality jobs. Furthermore, the pension coverage rate of employed workers aged 15 and above was estimated at 21 per cent nationally and at only 6 per cent in urban areas. At the national level, 77.5 per cent of those in employment have no medical insurance and a full 97.6 per cent of employees have received no employer-sponsored training.

86 No reliable data is available to facilitate an assessment of the true impact of sectoral policies on employment.
Mauritania

Employment lies at the heart of the strategy for accelerated growth and shared prosperity, which aims to reduce unemployment and job insecurity, in particular among women, young people and graduates. Given the scale of current labour market challenges, the strategy has established only modest unemployment reduction targets for 2020 and 2030, in particular among young people and women. To achieve those targets, the 2017-2030 national employment strategy was formulated on the basis of the guidelines of the strategy for accelerated growth and shared prosperity and the outcomes of the 2012 national survey on employment and the informal sector. The overall objective of the strategy is to reduce quantitative and qualitative employment deficits and to set in motion reforms to the vocational training system, improvements to the labour market information system, a revision of the mandate of the National Agency for the Promotion of Youth Employment, the creation of an employment fund, the creation of a higher council for employment, the strengthening of public employment services and the establishment of dynamic partnerships with the private sector. Other strategies also seek to boost employment and promote the economic empowerment of women and young people, including a national strategy for the promotion of micro and small enterprises and a microfinance strategy. In addition, efforts have been made in the field of technical and vocational training to enhance the employability of young people.

The numerous initiatives that support job creation include the following:

- National integrated support programme for decentralization, local development and youth employment, which has been in operation since 2014;

- National integrated microenterprise programme;

- Employment support fund, launched in 2012, which provides support for sustainable income-generating activities, in particular in marginalized areas, targeting vulnerable groups within society, facilitates the integration of unemployed graduates into the work force, and promotes microenterprises;

- Approval has recently been granted for the launch of a micro, small and medium-sized enterprise and youth employment support project, to be financed by the African Development Fund.

---

87 Precarious employment accounts for 20 per cent of the working population, and 33.7 per cent and 13.2 per cent of the working population in rural and urban areas, respectively. The majority of the working population is self-employed.

88 The employment rate for women is 24.5 per cent compared with 53.1 per cent for men, even though women comprise 57.5 per cent of the working-age population.

89 Employment policy focuses, in particular, on women and young people, as well as on individuals who have completed only primary or secondary education.

90 The National Agency for the Promotion of Youth Employment supports implementation of the country’s employment policy and has established a fund for the implementation of four major programmes, namely self-employment, job placements, skills development; and job shadowing. The Agency is active in only certain areas of the country, however, and has limited financial resources. Moreover, awareness of its activities remains limited and its initiatives are not always aligned with the priorities of other development partners.
It is hoped that the adoption of the 2017-2030 national employment strategy will streamline efforts by relevant stakeholders and provide for regular follow-up. In turn, this should ensure that resources are used more effectively and enhance the impact of relevant interventions.

The employment information system is fragmented and insufficiently disaggregated, in particular in terms of gender, environment and vulnerable groups. It is also characterized by irregular data collection, a lack of coherence among data collection mechanisms, weak technical and technological capacities, a lack of coherence among tools and nomenclatures, and limited data analysis and dissemination. Further efforts are therefore needed to develop an effective information system that provides data on employment, unemployment, labour market dynamics and decent work indicators. In February 2017, a new national survey on employment and the informal sector was conducted by the National Statistical Office in collaboration with ILO.

**Tunisia**

The promotion of employment and employability is a key component of the country’s 2016–2020 five-year development plan, which aims to reduce the unemployment rate to 12 per cent by 2020, in particular through the formulation of a new national employment strategy, and the ongoing reform of the vocational training system with a view to improving staff skills and enhancing the quality of outputs. An act requiring children under 18 years of age who are not in school to attend basic vocational training courses was adopted in March 2017. Implementation of that act will be supported by the creation of new vocational training centres. Each year, some 100,000 children at primary and secondary school levels fail to attend school, in particular in inland regions. The 2016-2020 five-year development plan also aims to increase the female work force participation rate to 35 per cent by 2020 from the 2014 figure of 28.5 per cent.

As the State no longer has the financial resources necessary to hire young people in large numbers, new public policies and programmes are oriented towards promoting employment in the private sector and encouraging young people to launch entrepreneurial initiatives. Developing entrepreneurship among young people and women and encouraging them to establish private-sector business initiatives is the Tunisian Government’s priority employment objective. A national entrepreneurship strategy is being finalized and the 2017 Finance Act has allocated 250 million Tunisian dinars to initiatives that support the creation of start-up companies. The Investment Code also provides benefits for young entrepreneurs. A national strategy to support the establishment by young people of private-sector business initiatives is currently being formulated, as is a national plan for women’s entrepreneurship for the years 2016-2020.

There are an increasing number of initiatives to promote the employment of young people. Those initiatives focus on improving the vocational training and

---

91 Employment data are from general population and housing census surveys, the most recent of which was conducted in 2013, other surveys and to a lesser extent from administrative records. The country’s baseline survey on employment and the informal sector facilitated the development of a methodology that was subsequently adopted as part of the 2014 permanent household survey.
higher education systems, supporting self-employment and business start-ups, the consolidation of social and solidarity economic practices, the strengthening of the region’s role in promoting employment, and strengthening employment policy abroad. To ensure the successful implementation of those initiatives, the engagement of relevant civil society organizations and the private sector will prove critical.

Partnerships with the regions are also being established with a view to reducing employment inequalities and enshrining the principle of equal opportunity within society. For example, a decent work programme has been mounted to facilitate the integration into the work force of first-time job seekers with tertiary education qualifications, by enabling them to acquire additional qualifications in line with the needs of private-sector companies\textsuperscript{92}. The national agency for employment and self-employment, ANETI, is entrusted with managing the programme.

2.2.4 Industrial diversification and transition

Goal 9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

| Target 9.2 | Promote inclusive and sustainable industrialization and, by 2030, significantly raise industry’s share of employment and gross domestic product. |
| Target 9.3 | Increase the access of small-scale industrial and other enterprises to financial services and their integration into value chains and markets. |
| Target 9.4 | By 2030, upgrade infrastructure and retrofit industries to make them sustainable, with increased resource-use efficiency and greater adoption of clean and environmentally sound technologies and industrial processes with all countries taking action in accordance with their respective capabilities (indicator 9.4.1 CO\textsubscript{2} emission per unit of value added). |
| Target 9.5 | Enhance scientific research, upgrade the technological capabilities of industrial sectors, including, by 2030, encouraging innovation and substantially increasing public and private research and development spending. |

Relevant issues

Small and medium-sized enterprises make up 90 per cent of the Maghreb industrial sector. The sector is characterized by relatively limited diversification, a lack of competitiveness, a shortage of qualified human resources and poor integration into regional and global value chains. Furthermore, its contribution to employment and territorial development remains limited\textsuperscript{93}. While the Tunisian and Moroccan economies are more advanced in terms of their sophistication and integration into global value chains, the technological content of their manufacturing sectors is still classified as low to medium and exports remain concentrated in a few product groups. For those countries, improving their industrial competitiveness and strengthening high-tech content will require an increase in their research and development budgets, which are currently well below 1 per cent of GDP, along with measures to upgrade their education systems, encourage more students to study technical and engineering subjects, and strengthen the technological skills and limited financial capacities of small and medium-sized enterprises.

\textsuperscript{92} The Programme aims to recruit 25,000 graduates in 2017, with financial support provided by the Government.

\textsuperscript{93} Major industries are located primarily on the coast, close to export ports.
The industrial sector in Algeria is dominated by hydrocarbons, which generate 30 per cent of GDP and 95-98 per cent of the country’s exports. Manufacturing (excluding hydrocarbons) contributed only 5 per cent of GDP in 2015 but generated some 15 per cent in the late 1980s. Manufacturing exports are marginal, accounting for 4.6 per cent of total exports in 2016, and the degree of sophistication of domestic production is relatively low.

Industry in Morocco has witnessed improvements in its added value in recent years, in particular in the chemical and parachemical, automotive and agro-industrial sectors. Exports of industrial products grew steadily between 2010 and 2016 with an average annual growth rate of 7.34 per cent, while exports of manufactured goods rose from 66 per cent of total exports in 2010 to 69.4 per cent in 2015. In 2015, that sector generated added value equivalent to 15.7 per cent of GDP. Some 80 per cent of manufacturing exports are low-, medium- or high-technology products. Exports of medium and high-technology manufactured goods increased from an average of 23 per cent of total exports between 2000 and 2007 to 40 per cent between 2008 and 2015 as a result of an increase in exports of phosphate derivatives, vehicles and electrical equipment and appliances. The share of exports of low-technology products remains high, and stood at around 37 per cent in 2015, even though that share has been falling in recent years, and stood at 59.5 per cent in 2000. High-tech manufactured goods accounted for some 6 per cent of exports between 2008 and 2015.

In Mauritania, an informal subsistence economy exists side by side with a traditional economy based, primarily, on fisheries and on iron, gold, copper and oil exports. According to the World Bank’s 2015 diagnostic trade integration study update for Mauritania, published in February 2016, extractive industries accounted for 27 per cent of GDP on average and more than half of national exports between 2010 and 2014, but only 1.7 per cent of employment. Despite its considerable potential, the share of GDP generated by the fisheries sector, including catches and related upstream and downstream activities, remains relatively low, and stood at just under 6 per cent in 2013. The fisheries sector generates little local value but provides 13 per cent of budgetary revenues, 25 per cent of foreign exchange earnings and approximately 3 per cent of national employment, with 80 per cent of those working in the sector employed in artisanal trades. The manufacturing sector is poorly diversified and is oriented towards the production of a small number of local and import-substitution products. Regardless of whether they operate in the formal or the informal economy, manufacturing companies are generally uncompetitive, do not enjoy access to a highly-skilled labour force and do not receive sufficient support to prepare them for market liberalization and new quality standard requirements. Furthermore, the competitiveness of manufacturing companies is impeded by the relatively high cost of key inputs, including water, electricity, transport, financing, and imported inputs for production, as well as by the limited size of the domestic market.

In Tunisia, industrial exports fell from 56 to under 50 per cent of GDP between 2008 and 2015 and the economy of Tunisia is now based primarily on the tertiary sector.

---

94 Source: Ministry of Economy and Finance, Directorate of Financial Studies and Forecasts.
95 A high proportion of catches in Mauritanian waters are not processed within the country.
which generates 55 per cent of GDP. Manufacturing accounted for 14.9 per cent of GDP and nearly 70 per cent of the country’s total exports in 2016, which gives it significant weight in the national economy (2016-2030 national green economy strategy and five-year plan). Manufacturing is increasingly diversified, and now includes mechanical, electrical and electronic industries. Those industries accounted for 41 per cent of the country’s exports of manufactured goods in 2015.

The proportion of total goods exports generated by technology-based sectors, including electronics, automotive and aeronautics, engineering plastics, information and communications technology and management system outsourcing increased from 12 to 25 per cent between 1995 and 2010. According to the Tunisian Institute of Competitiveness and Quantitative Studies, however, sectors with a high knowledge content still generate less than 20 per cent of GDP, despite the implementation of a number of industrial modernization and other programmes to boost companies’ competitiveness. The share of exports of low, medium and high-tech manufactured goods in total manufacturing exports was approximately 63.8 per cent in 2016. The agri-food industry, including oil mills and fish, fruit and vegetable canneries, is the second largest industrial sector in terms of production and added value. It generates 3 per cent of GDP and 20 per cent of industrial value added and accounts for some 75,000 jobs. The phosphate and mining sector was previously a major contributor to the national economy, but its contribution to total exports of goods and services fell sharply from 14 per cent in 2010 to 4 per cent in 2015. The informal economy grew strongly, from 15 per cent in 2011 to more than 50 per cent in 2016.

The four countries are aware that industrial development plays an important role in structural transformation and are seeking to promote sustainable and inclusive industrialization that will create growth and jobs and foster more equitable regional development. They should focus their efforts on promoting innovation, improving the business climate and upgrading companies so that they can move upmarket and integrate successfully into regional and global value chains. Public and private sector research and development budgets should also be increased with a view to enhancing the technological capabilities of industry and fostering innovation and job creation.

**Trend analysis**

- Manufacturing value added as a proportion of GDP (indicator 9.2.1) has not changed in recent years, except in Tunisia where it fell from 16.5 per cent in 2010 to 14.9 per cent in 2016. Over the period 2010–2016, it averaged 15 per cent in Morocco, 6.5 per cent in Mauritania and 5 per cent in Algeria.

- Manufacturing employment as a proportion of total employment (indicator 9.2.2) remained stable in Algeria and Tunisia, but declined in Morocco over the period 2010-2016. In 2016, it stood at 18.5 per cent in Tunisia, 13.5 per cent in Algeria and 10 per cent in Morocco. It stood at 6.8 per cent in Mauritania in 2013.

- The proportion of small-scale industries in total industry value added (indicator 9.3.1) stood at 61 per cent in Algeria between 2010 and 2014, and 27 per cent in Morocco in 2010. Data on that indicator are not available.
for Mauritania or Tunisia. The proportion of small-scale industries with a loan or line of credit (indicator 9.3.2) increased from 20 per cent in 2015 to 39 per cent in 2016 in Algeria. Data on that indicator are not available for the other three countries.

• The development of a green industrial base that uses clean manufacturing technologies and makes more efficient use of resources and energy (target 9.4) is a clear priority set forth in the sustainable development and green economy strategies of Algeria, Morocco and Tunisia. That priority is reflected in measures to support compliance with environmental standards, energy audits and company certification regimes, including those relating to corporate social responsibility, environmental management standards, energy management and risk management. An industrial sector energy-efficiency programme is being developed in all three countries. These measures still fall short of what is required, however, and are not integrated into a comprehensive strategy to encourage industries to adopt social and environmental responsibility policies that are in line with the Sustainable Development Goals. Current industrial policies do not explicitly integrate issues related to climate risk adaptation, CO₂ emission reduction and energy efficiency. Indicator 9.4.1, namely CO₂ emission per unit of value added is not reported by any of the countries. It should be noted that a number of large energy, agrifood, cement and phosphate production companies have already taken voluntary steps to reduce their greenhouse gas emissions and have implemented energy and material recovery policies.

• Although innovation and technological development are key factors in industrialization, research and development expenditure as a proportion of GDP (indicator 9.5.1) remains insufficient and well below the target of the African Union, which states that at least 1 per cent of GDP should be spent on research and development by 2020. In Tunisia, spending on scientific research decreased between 2012 and 2015, from 0.68 to 0.66 per cent of GDP. Morocco allocated 0.79 per cent of GDP in 2016 and aims to increase overall funding for research and development to 3 per cent of GDP by 2020. National data are unavailable for Algeria or Mauritania. The United Nations Educational, Scientific and Cultural Organization (UNESCO) estimates that Algeria spends 0.1 per cent of its GDP on research and development.

• Research and development expenditure in all the countries is provided, primarily, by the Government. The absence of appropriate financial instruments means that industry provides very limited support to national research, development and innovation efforts. As a result, the manufacturing in the four countries is characterized by low levels of sophistication and local technological content. To strengthen industry, significant efforts must

---

96 The Republic of Korea allocates 4.3 per cent of its GDP to research, while Japan and Brazil allocate 3.6 and 1.2 per cent, respectively (UNESCO, 2016). In Europe, Austria spent 3 per cent of GDP on research and development in 2015 compared with a European Union average of 2 per cent (source: Eurostat).
97 The new 2017-2022 scientific research strategy seeks to ensure that, by 2022, 1 per cent of GDP is allocated for scientific research.
be made to modernize companies, improve workers’ skills, and streamline innovation and research systems and mechanisms. Care must also be taken to develop industrial policies that are aligned with national education, training and innovation policies. In addition, publically funded research must be more closely aligned with the needs of industry.

- To support innovation, the countries will need to develop sustainable funding systems, reorient their research ecosystems, facilitate the establishment of public-private partnerships and support human resource training. The new industrial policies developed by Algeria, Morocco and Tunisia aim, in particular, to develop innovation clusters and to strengthen the technological capabilities of companies. Morocco is ranked 72\textsuperscript{nd}, Tunisia 74\textsuperscript{th} and Algeria 108\textsuperscript{th} out of 127 countries in the World Intellectual Property Organization 2017 Global Innovation Index.

**Key measures implemented and recent country initiatives**

The key measures implemented by the four countries aim, primarily, to enhance the business climate, promote investment, modernize the industrial sector, upgrade small and medium-sized enterprises, establish industrial zones, and foster innovation and technology transfer.

**Algeria**

Algeria aims to double manufacturing value added as a proportion of GDP, from 5 per cent in 2016 to 10 per cent by 2030. Identified priority areas include agrifoods, downstream hydrocarbons including petrochemicals and fertilizers, mineral resources, including iron, phosphates and rare earths, steel, cement, automobiles, aircraft and ships, electronics, telecommunications equipment and pharmaceuticals. The industrial sector action plan provides for particular support to be provided to agrifood companies, which account for between 40 and 50 per cent of industrial value added and enhance the country’s food security. A dedicated technical support centre provides training to agrifood professionals. Advantageous financial and fiscal regimes also encourage investors to support initiatives related to energy efficiency, solar and photovoltaic power generation, solar water heaters, thermal insulation, and biodegradable products and packaging. Algeria also plans to establish a series of national higher education institutions specializing in industrial economics, careers in industry, logistics and management. Act No. 16-09 of 3 August 2016 on investments establishes favourable regimes for those investing in clean technology applications.

In order to improve the environmental footprint and competitiveness of companies, Algeria has launched a programme to help companies obtain certification in international quality, environmental and safety management standards.\textsuperscript{98} By the end of 2015, a total of 341 companies had obtained ISO 14001 certification. To support the country’s industrial policy, Algeria has adopted a policy on the development of small and medium-sized enterprises, which comprised 99 per cent of the industrial base of the country and generated 61 per cent of industrial value added in 2014. A

new small and medium-sized enterprise development agency has been established and Act No. 17-02 of 10 January 2017 on small and medium-sized enterprises was adopted to facilitate access by small and medium-sized enterprises to public procurement contracts, industrial land, finance and upgrading programmes. Further support is provided by the national fund for upgrading small and medium-sized enterprises, investment and industrial competitiveness, while Act No. 15-21 on scientific research and technological development was adopted in 2015 with a view to supporting research in the economic and social fields and establishing industrial research departments within companies to foster innovation. Algeria is now drafting a strategy to promote industrial innovation.

Morocco
The 2014-2020 industrial acceleration plan aims to create 500,000 sustainable jobs and increase the industry value added as a proportion of GDP to 23 per cent by 2020. Implementation of the plan will result in the establishment of integrated industrial ecosystems, the development of tools to enhance the competitiveness of small and medium-sized enterprises and microenterprises, the integration of the informal sector, which generates 40 per cent of GDP, into the regular economy, and the development of mechanisms to support research and innovation. Furthermore, through its establishment of technology parks and free trade areas, the Government has leveraged additional industrial FDI, which accounted for 30 per cent of total FDI in 2015.

Mauritania
The country’s 2016-2020 industry strategy was adopted with a view to improving the competitiveness of the industrial sector and facilitating the integration of its industries into the national economy and into regional and international markets. The strategy seeks to increase manufacturing value added as a proportion of GDP from 6.5 per cent in 2016 to 7 per cent by 2020 and to facilitate the creation of more than 250 small and medium-sized enterprises. The strategy focuses on key growth areas with significant potential for sustainable diversification and development, including livestock and arable farming, fisheries and extractive industries. The added value of those sectors will be boosted through measures to promote industrial development and transformation, support stakeholders in specific value chains, and increase the financial resources earmarked for technological research.

More specifically, the strategy aims to address the main constraints impeding the performance of the industrial sector, namely limited access to investment financing, insufficient public support for businesses and the weakness of professional organizations, insufficient institutional coordination among relevant ministerial departments, weak demand and an unsupportive business environment, which, despite recent progress, continues to impede FDI mobilization. Mauritania also plans to establish an industrial sector observatory and to take steps to restructure and upgrade the country’s industrial enterprises. Furthermore, the Nouadhibou free zone, established in 2013, will facilitate the development of a fish-processing industry, enhance port and commercial logistics systems and help bolster the tourism industry.
Tunisia

The country’s industrial strategy to 2016 failed to place sufficient emphasis on research and innovation. The 2016-2020 five-year development plan aims, by 2020, to increase the industry value added as a proportion of GDP by an average of 8 per cent, double the value of the country’s exports to 42 per cent of GDP and increase the export sector value added from the current 15 per cent to 20 per cent. It also aims to increase the share of GDP generated by high-tech sectors to 30 per cent by 2020. The plan also aims to reduce the unemployment rate to approximately 10 per cent by 2025, in particular among college graduates and those living in marginalized inland regions. The agrifood industry$^{99}$ plays a key role in the country’s economic development. It generates 3 per cent of the GDP, provides 14 per cent of jobs and accounts for 19 per cent of industrial firms in the country. Tunisia plans to manufacture key components and equipment used in the construction of solar and wind energy generation plants, but no quantified targets have been established in that regard. Tunisia is now formulating a new industrial strategy for the period to 2030. Innovation will lie at the heart of that strategy, which will aim, in particular, to enhance collaboration among research institutions and relevant economic and industrial stakeholders.

2.2.5 Adaptation to climate change and combating desertification

Goal 13. Take urgent action to combat climate change and its impacts.

- Target 13.1 Strengthen resilience and adaptive capacity to climate-related hazards and natural disasters in all countries.
- Target 13.2 Integrate climate change measures into national policies and strategies.

Goal 15. Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss.

- Target 15.1. Ensure the conservation, restoration and sustainable use of terrestrial ecosystems, in particular forests.
- Target 15.2 Sustainable management and restoration of forests.
- Target 15.3 By 2030, combat desertification, restore degraded land and soil and strive to achieve a land degradation-neutral world.

Relevant issues

Climate change and efforts to combat desertification are closely linked. The Maghreb is an arid and semi-arid region that is subject to recurrent droughts and experiences high spatial and inter-annual variability in rainfall. The aridity of the climate, which exacerbates desertification, affects almost 85 per cent of the subregional geographical area. Approximately 93 per cent of the territory of Morocco, and 96 per cent of Tunisia, is classified as arid or semi-arid and forest cover is low. In Algeria and Mauritania, forests cover only 1.7 per cent and 0.12 per cent of the national territory, respectively.

$^{99}$ Tunisia is the world’s leading exporter of dates and olive oil; it is also the second largest exporter of organic products in Africa.
Initial report on the achievement of the Sustainable Development Goals in the Maghreb

In 2015, forest cover was estimated to cover 12.7 per cent of the national territory of Morocco and 8.33 per cent of the national territory of Tunisia.

All the countries also suffer from varying degrees of water stress, with estimated per capita availability of renewable fresh water resources of less than 700 m³ per year in Morocco, 400 m³ in Tunisia and less than 300 m³ in Algeria. No data are available for Mauritania. This widely used indicator will be replaced by the Goal 6 indicator on water stress, namely indicator 6.4.2 on freshwater withdrawal by major sectors, including agriculture, industry and domestic users, as a proportion of available freshwater resources, which are calculated after taking into account environmental water requirements.

The region’s significant vulnerability to the challenge of climate change has been acknowledged by the Intergovernmental Panel on Climate Change, whose projections indicate an increase in temperatures of between 1 and 4 degrees Celsius and a decrease in annual rainfall, which could lead to a 50 per cent drop in crop yields in certain ecosystems by 2020. Extreme weather events, including droughts, heat waves and floods, could become more frequent. Climate change aggravates water deficits and desertification and exacerbates the degradation and loss of productivity of agricultural, pastoral and forest ecosystems.

**Trend analysis**

- As shown in table 3, although CO₂ emissions are still low, they are rising, in particular in Algeria and Morocco. Emissions rose by 2.9 per year between 1994 and 2012 in Morocco, in tandem with the country’s socioeconomic development, and by 1.5 per cent per year in Tunisia over the same period.

**Table 3: Total net carbon dioxide emissions (tons of CO₂ equivalent per capita)**

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>3.30</td>
<td>3.90</td>
<td>3.80</td>
<td></td>
</tr>
<tr>
<td>Mauritania</td>
<td>2.057</td>
<td>2.10 (2012)</td>
<td>2.15</td>
<td>2.44/2.88</td>
</tr>
<tr>
<td>Morocco</td>
<td>2.95</td>
<td>3.10 (2012)</td>
<td>3.26</td>
<td>3.44/4.34</td>
</tr>
<tr>
<td>Tunisia</td>
<td>3.10</td>
<td>3.00 (2012)</td>
<td>2.50</td>
<td>1.60 (2030)</td>
</tr>
</tbody>
</table>

- Adoption and implementation of national and local disaster risk reduction strategies in line with the Sendai Framework for Disaster Risk Reduction 2015-2030 (indicator 13.1.2).

The Maghreb countries are experiencing rapid urbanization and increasing human activity near their coastlines, and are increasingly vulnerable to the negative impacts...
of climate change, including droughts, storms, floods and wildfires. Anticipating and managing risk is therefore of paramount importance to the four countries, in particular as disasters can significantly undermine key sectors, including infrastructure, energy, agriculture, the environment, water, health and education. Although significant progress has been made in that regard, including the development of a legislative and regulatory corpus, the establishment of dedicated financial mechanisms, the integration of risk factors into sectoral plans, the establishment of multi-stakeholder consultation bodies and the creation in Algeria and Morocco of compulsory natural disaster insurance mechanisms, much remains to be done. In particular, existing legal frameworks are ill-suited to address disaster and emergency scenarios, and challenges remain with regard to risk assessment and planning, risk and disaster response financing, governance, including the division of responsibilities, coordination among stakeholders and the involvement of civil society, the private sector and local authorities, and a lack of awareness among vulnerable populations of how to prevent or reduce the risk of disasters. Action must be taken in all countries to raise awareness, in particular at the community level, of how to prevent or reduce disaster risks. Steps must also be taken to strengthen the capacities of relevant stakeholders. Attention should be given, in particular, to ways in which science and technology can be used to mitigate risks.

Algeria has adopted a major risk prevention and disaster management policy, which aims to raise awareness and deepen understanding of risks, strengthen monitoring and early warning networks, enhance the protection infrastructure programme and develop national disaster management capacities. A national plan for the prevention and management of major natural and technological risks and a framework law on major risk prevention and disaster management were adopted in 2003 and 2004, respectively. The national land use planning scheme also takes into account disaster risks. Numerous funds have been established, including a natural disasters fund, a national solidarity fund and a national housing fund, and a weather watch map is published daily by the National Meteorological Office.

Morocco has recently adopted an integrated natural disaster risk management programme for the period 2017-2021, and is planning to reorient the natural disaster mitigation fund so that it plays a more active role as a national resilience fund.

Mauritania has adopted a disaster management law and, in 2009, adopted a national disaster risk reduction strategy and plan. A disaster monitoring and management centre at the Ministry of the Interior and Decentralization was established in 2015. With the support of the capacity for disaster reduction initiative, a national flood response contingency plan was developed in 2014. There is, however, no centralized mechanism to coordinate multisectoral initiatives and stakeholders’ roles and responsibilities. Disaster risk reduction is insufficiently addressed in sectoral policies and local authorities have so far taken insufficient action to address that issue. Although numerous studies on risk exposure have been conducted, no comprehensive risk assessment has been carried out. Existing early warning systems are dispersed and the information they produce is little used. The 2017 national zero hunger strategic

---

102 In Tunisia, legislation that is currently being drafted would make it compulsory to take out natural disaster insurance.
review called for the development of a national multi-risk contingency plan and the creation of a database accessible to all relevant stakeholders.

The first national report of Tunisia on the implementation of the Hyogo Framework for Action on Disaster Risk Reduction, which covered the period 2011-2013, highlighted the shortcomings of existing mechanisms, which are governed by Act No. 39-91 of 8 June 1991 on disaster response, prevention and relief. Those mechanisms include national and regional plans for addressing major natural and technological risks and focus on disaster and post-disaster management and, to a much smaller degree, on disaster prevention. Action should now be taken to formulate a comprehensive multidimensional risk analysis strategy, strengthen the current legislative framework, establish enhanced early warning systems that address all risks and cover the entire national territory, build capacity and ensure that relevant mechanisms are adequately funded. Tunisia is now taking steps to establish a natural disaster fund.

On the basis of identified gaps and in order to achieve the objectives set forth in the Sendai Framework for Disaster Risk Reduction 2015-2030, the four countries should take priority action with a view to:

- Integrating disaster risk management into national and local development strategies and plans;
- Adopting more integrated and inclusive multi-risk management policies;
- Conducting detailed disaster risk assessments at the national, regional and local levels, and ensuring that assessment outcomes are taken into account in national planning and investment decisions;
- Aligning disaster risk management and climate change mitigation strategies;
- Strengthening existing legislative frameworks on disaster prevention;
- Establishing institutional multistakeholder coordination mechanisms;
- Developing innovative mechanisms that enhance the resilience of populations affected by disasters;
- Ensuring that disaster risk reduction measures are included in regional and local development plans;
- Developing effective monitoring mechanisms that make use of regional data collection and verification systems;
- Establishing a network of multi-hazard early warning systems, in particular at the local level;
• Establishing national natural disaster risk insurance programmes that provide coverage for the most vulnerable members of society;

• Strengthening the capacities of stakeholders involved in risk management, in particular at the local level, by such measures as developing relevant methodological tools and conducting training and awareness-raising programmes.

• Indicator 13.2.1: Communication of the establishment and operationalization of policies, strategies or plans that strengthen resilience to climate change and promote a reduction in greenhouse gas emissions (including in a national adaptation plan, national determined contribution, national communication on climate change or a biennial update report).

Resilience to climate change is addressed in several cross-cutting strategies, including the national sustainable development strategy, the strategy for accelerated growth and shared prosperity, the 2016-2020 economic and social development plan and relevant sectoral programmes. With the support of their development partners, all the countries have implemented climate change adaptation projects and programmes that aim to bolster the resilience of communities, including by enhancing food security and water resource management, promoting renewable power generation in rural areas, and implementing adaptation strategies in coastal cities.

The countries have also formulated nationally determined contributions, with a view to reducing their greenhouse gas emissions, and are drawing up adaptation measures, in particular for priority sectors such as water resource management, agriculture, health, tourism, and forestry and pastoral ecosystem oversight. The nationally determined contribution adaptation objectives are qualitative in nature, however, and fail to address all areas of concern in each sector. Accordingly, all the countries are now developing national adaptation plans,\textsuperscript{103} which should complement their nationally determined contributions and exploit potential synergies in governance, coordination, funding, monitoring and reporting. A number of challenges remain with regard to institutional oversight of climate policies, despite the establishment by the four countries of interministerial coordination bodies, including national climate committees in Algeria and Morocco, sectoral committees in Tunisia and sectoral climate change focal points in Mauritania.

An assessment conducted to determine the extent to which climate change is addressed by public policies in Morocco\textsuperscript{104} revealed the absence of a comprehensive approach to sectoral policy design that took into account the changing climate vulnerabilities of different areas of the country. The main policy and institutional frameworks of the four countries are outlined in table 4 below.

\textsuperscript{103} Article 7.9 of the Paris Agreement recommends that each Party shall, as appropriate, formulate and implement national adaptation plans, in accordance with the decisions of the sixteenth session of the Conference of the Parties to the United Nations Framework Convention on Climate Change, held in Cancun, Mexico, in 2010.

\textsuperscript{104} Economic, Social and Environmental Council report on investigations initiated by the Council No. 21/2015 concerning the integration of climate change requirements into public policies.
### Table 4: Key strategic frameworks

<table>
<thead>
<tr>
<th>Country</th>
<th>National determined contribution, which aims to reduce greenhouse gas emissions by 12 per cent through national efforts alone and by 22.3 per cent with the provision of international support.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>National climate plan, drawn up in 2013, which is being revised and endorsed at the sectoral level.</td>
</tr>
<tr>
<td></td>
<td>Second national communication on climate change, formulated in 2010.</td>
</tr>
<tr>
<td></td>
<td>Third national communication on climate change, initiated in 2018.</td>
</tr>
<tr>
<td>Mauritania</td>
<td>National determined contribution, which aims to reduce greenhouse gas emissions by 17 per cent by 2030 through national efforts alone and by 42 per cent with the provision of international financial and technical support.</td>
</tr>
<tr>
<td></td>
<td>Updated national determined contribution report (May 2017).</td>
</tr>
<tr>
<td></td>
<td>2014-2030 national climate change policy and post–2009 national plan to combat climate change.</td>
</tr>
<tr>
<td></td>
<td>Third national communication (2016) and first updated biennial report (2016).</td>
</tr>
<tr>
<td></td>
<td>Launch of the process to prepare the fourth national communication.</td>
</tr>
<tr>
<td></td>
<td>Establishment in 2015 of a centre for skills development in the field of climate change.</td>
</tr>
<tr>
<td>Morocco</td>
<td>National determined contribution, which aims to reduce carbon intensity by 13 per cent by 2020 through national efforts alone and by 41 per cent with the provision of international support (75 per cent of the nationally determined contribution objective is to be achieved through implementation of the national energy transition policy).</td>
</tr>
<tr>
<td></td>
<td>2012 national climate change strategy.</td>
</tr>
<tr>
<td></td>
<td>Second national communication (2014) and third national communication (late 2017).</td>
</tr>
<tr>
<td></td>
<td>National strategy on agricultural sector, natural resource and ecosystem climate change adaptation.</td>
</tr>
<tr>
<td></td>
<td>National strategy for coastal adaptation to accelerating climate change-related rises in sea levels.</td>
</tr>
<tr>
<td>Tunisia</td>
<td>National determined contribution, which aims to reduce carbon intensity by 13 per cent by 2020 through national efforts alone and by 41 per cent with the provision of international support (75 per cent of the nationally determined contribution objective is to be achieved through implementation of the national energy transition policy).</td>
</tr>
<tr>
<td></td>
<td>2012 national climate change strategy.</td>
</tr>
<tr>
<td></td>
<td>Second national communication (2014) and third national communication (late 2017).</td>
</tr>
<tr>
<td></td>
<td>National strategy on agricultural sector, natural resource and ecosystem climate change adaptation.</td>
</tr>
<tr>
<td></td>
<td>National strategy for coastal adaptation to accelerating climate change-related rises in sea levels.</td>
</tr>
</tbody>
</table>

- Forest area as a proportion of total land area (indicator 15.1.1)

Overexploitation and degradation of forest resources are major problems in all the countries. As there is no effective or regular monitoring of ecosystems and forest-related activities, there is a lack of reliable and up-to-date data on forest cover trends and changes. National forest inventories are not carried out regularly and are sometimes incomplete. In Mauritania, for example, the only comprehensive forest

---

105 The Climate Change Competence Centre of Morocco aims to promote capacity-building at both the national and continental levels in areas related to the integration of climate change into sectoral policies, access to climate finance, research and knowledge management. It also serves as a regional platform for strengthening South-South cooperation.
inventory was conducted in 1982, and, while other inventories have been carried out, these failed to cover all the country’s forest areas. In Tunisia, a forestry inventory that used 1990 as the reference year was published in 1995, and a grazing land inventory that used 2000 as a reference year was published in 2010. A system for monitoring yearly changes to forest plantations and grazing land was established in 1990. In Morocco, a forest inventory that used 1990 as the reference year was published in 2005, and another inventory that used 2004 as a reference year was published in 2013. Algeria carried out two forest inventories: one in 1984 and another in 2008, with the latter using 2003 as a reference year.

Table 5 below summarizes the data provided by the four countries.

Table 5: Forest area as a proportion of total land area (indicator 15.1.1)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>1.70</td>
<td>1.70</td>
<td>1.70</td>
<td></td>
</tr>
<tr>
<td>Mauritania</td>
<td>0.12 (2014)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>12.00</td>
<td>12.70</td>
<td>12.70</td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>8.12</td>
<td>8.33</td>
<td>8.36</td>
<td>8.70 (2020)</td>
</tr>
</tbody>
</table>

Forest area as a proportion of total land area appears to have changed little in recent years in Algeria, Morocco and Tunisia, and government initiatives, including reforestation, forest protection and other projects, have slowed deforestation rates.

In Algeria, the 2017-2035 forestry strategy aims to prevent and reduce desertification through land and ecosystem restoration, water and soil conservation, the expansion of the country’s Green Dam to cover an additional 300,000 ha by 2035 and by increasing the proportion of the country’s total land area that is covered by forests to 2.1 per cent (up from 1.72 per cent in 2016). The desertification sensitivity index is expected to decrease from 45 to 40 per cent by 2035. The 2000-2020 national reforestation plan aims to plant trees on 1 million ha of land. A fund to combat desertification and develop pastoralism and the Algerian steppe has been established while the 2017-2035 national environmental action plan for sustainable development provides for the establishment of a desertification monitoring system and a national desertification modelling programme.

In Morocco, the average percentage of forest cover or, in other words, the share of forests among all different land uses, is around 8 per cent. This is below the optimal 15-20 per cent necessary for ecological and environmental balance. The 2015-2024 ten-year plan for forestry development aims to sustain the accelerating pace of reforestation and forest regeneration, which increased from 18,000 ha per year prior to 2005 to 36,400 ha per year between 2005 and 2014.

The true potential of forest resources in Mauritania is poorly understood because of the lack of reliable statistics. Current estimates indicate that the land area covered by forest formations, including classified forests, fell by approximately 68.9 per cent between 2014 and 2016.
between 1982 and 2014, from 15,134,000 ha to approximately 4,706,000 ha. That trend is slowing, however, with the annual loss of forests currently estimated at 8,000 ha per year, comprising 4,000 ha of forest and 4,000 ha of sparsely wooded land. Indeed, the annual loss of forests was estimated at 15,000 ha per year in 2010.107 The country’s national forest policy has adopted a decentralized natural resource management approach that allows participatory management to be exercised by local communities. The country is currently implementing a national strategy and initial action plan for the years 2014-2018, which were developed with a view to implementing the Great Green Wall for the Sahara and the Sahel Initiative.108 The action plan, which targets arid areas, supports the sustainable management of production systems, local development, sectoral development, research and knowledge management, stakeholder capacity-building, and the development of monitoring and evaluation mechanisms.

In Tunisia, degraded forests covered more than 380,000 ha in 2000, accounting for 40 per cent of the total forested area. Between 2000 and 2015, approximately 110,000 ha of land were reforested (National Forestry Service, 2016). The 2015-2024 national strategy for the sustainable development and management of forests and rangelands aims to accelerate reforestation efforts so that 16,000 ha are reforested every year, (this compares with 6,200 ha per year during the last five years) and to increase the proportion of forests that are actively managed from 36 to 60 per cent.

- Progress towards sustainable forest management (indicator 15.2.1)

Assessing progress towards sustainable forest management is complex as indicator 15.2.1 incorporates a number of variables. The United Nations Forum on Forests describes sustainable forest management as "a dynamic and evolving concept that aims to maintain and enhance the economic, social and environmental value of all types of forests, for the benefit of present and future generations." FAO recommends that the indicator should be monitored through a set of four subindicators related to changes in forest area, carbon stocks, the area designated for biodiversity conservation and the area under sustainable forest management certified by independent forest management certification schemes.

Other indicators may also be used, such as the proportion of forest area covered by a long-term development and management plan, the proportion of forest area located in legally established protected areas, the proportion of forest area allocated for conservation, research carried or investments made in forests. In addition to these indicators, qualitative indicators relating to policies, legal frameworks and instruments developed for the sustainable management of forests may also be used.

107 FAO Global Forest Resources Assessment, 2015; national FRA report of Mauritania.
108 Great Green Wall for the Sahara and the Sahel Initiative, adopted in 2010 by the African Union, aims to reverse desertification and land degradation and biodiversity loss to ensure that, by 2025, ecosystems are resilient to climate change and continue to provide essential services, contributing to human well-being and poverty eradication. The Initiative, which focuses on vulnerable arid areas of the Sahel and Sahara, is an integral part of efforts to implement the United Nations Convention to Combat Desertification in Those Countries Experiencing Serious Drought and/or Desertification, Particularly in Africa, and of national, subregional and regional action plans to combat desertification.
Despite their economic and social importance, forest resources are still not optimally managed and developed in the four Maghreb countries. Instruments that can be used in the design of sustainable forest management mechanisms, including forest inventories, management plans, forest land registers and monitoring and evaluation systems, are often weak or incomplete. Gaps also remain in terms of the technical and financial capacities of local communities, while rural populations are often poor and insufficiently engaged in forest management. In addition, data to inform quantitative indicators are not always available and reliable enough for use. The countries must strengthen their existing inventory and monitoring systems with a view to improving the collection, analysis and dissemination of national data, and must promote the use of remote sensing so that they can regularly assess and monitor changes to their forested areas.

Since 2016, Algeria has been implementing basic forest management plans, and aims to manage 190,000 ha by 2020 and 1 million ha by 2030. It is also taking steps to establish national standards for sustainable forest management. In Morocco, approximately 8 per cent of forests, accounting for 4 million ha, were covered by a forestry management plan and participatory management mechanisms between 2010 and 2016. The National Centre for Climate and Forest Risk Management was established in 2016. In Mauritania, the proportion of forests that were being managed was estimated at 10 per cent in 2015. In Tunisia, the 2015-2024 national strategy for the sustainable development and management of forests and rangelands aims to foster the development of a green economy, raise awareness of the impact of climate change on forested areas and promote public-private partnerships. The current revision of the Forestry Code should also promote the involvement of communities in forest management initiatives and the effective implementation of sustainable forestry development and management plans.

The United Nations strategic plan for forests 2017-2030 was adopted by the General Assembly in May 2017. That strategic plan establishes a global framework to halt the loss of forest cover, increase the area of sustainably managed forests and bolster the role played by forests in supporting sustainable development and livelihoods. The plan underlines the importance of innovative partnerships to develop and implement management plans that adopt innovative approaches, make use of modern technology, promote sustainable economic development and safeguard the environment. It also stresses the need to ensure that sustainable forest and land management is addressed in national development planning and budgetary processes. The plan also provides that Member States may, on a voluntary basis, determine their contributions towards achieving the global forest goals and targets, including the target of increasing forest areas by 3 per cent worldwide by 2030, compared with the baseline established in the FAO Global Forest Resources Assessment, 2015.

- Proportion of land that is degraded over total land area (indicator 15.3.1)

At its twelfth session, held in Ankara in October 2015, the Conference of the Parties to the United Nations Convention to Combat Desertification in Those Countries Experiencing Serious Drought and/or Desertification, Particularly in Africa, endorsed Sustainable Development Goal target 15.3 and the concept of land-degradation
neutrality\textsuperscript{109} as a particularly important tool that could facilitate implementation of the Convention. The Conference invited countries to formulate voluntary national targets on land-degradation neutrality and to integrate these targets into their national development policies and national action programmes to combat desertification. A global programme was launched in 2016 to help countries establish and achieve voluntary national land-degradation neutrality targets. In addition, the Conference of the Parties developed a guidebook on best practices that set forth recommendations on how to calculate indicator 15.3.1. That indicator uses data from three subindicators, namely land cover (land cover change), land productivity (net primary production) and carbon stocks (soil organic carbon). Countries are also encouraged to establish complementary indicators that take into account their particular national and subnational characteristics and conditions.

Many countries, including those in the Maghreb, currently lack the tools, data and expertise to establish baselines and monitor and report on progress achieved in relation to combating land degradation. A number of gaps could be closed, however, by making use of currently available global and earth observation data. For example, the Climate Change Initiative Land Cover Project generates land cover maps for all countries.

At its thirteenth session, by its decision 7/COP.13, the Conference of the Parties to the Nations Convention to Combat Desertification endorsed the future strategic framework of the Convention for the period 2018–2030 and encouraged the parties to the Convention to apply and, as appropriate, align themselves with the Convention’s 2018–2030 strategic framework in their national policies, programmes, plans and processes relating to desertification and land degradation and drought, including in their national action programmes. The Conference of the Parties underscored that the strategic framework would contribute, first, to achieving the objectives of the Convention and the 2030 Agenda, in particular regarding Sustainable Development Goal 15 and target 15.3 and other interrelated Sustainable Development Goals, within the scope of the Convention; second, to improving the living conditions of affected populations; and, third, to enhancing ecosystems services.

\textsuperscript{109} At its twelfth session, the Conference of the Parties defined land-degradation neutrality as a state whereby the amount and quality of land resources necessary to support ecosystem functions and services and enhance food security remain stable or increase within specified temporal and spatial scales and ecosystems. By achieving land-degradation neutrality it is possible to maintain or increase the natural capital of the land and associated terrestrial ecosystem services relative to a reference level.
Chapitre 3: Regional cooperation to achieve the Sustainable Development Goals

Regional cooperation is expected to play a central role in the implementation of the 2030 Agenda by empowering countries to address common challenges through the adoption of more appropriate, cost-effective and transferable solutions. By strengthening their partnerships with other States, countries can more effectively collaborate on innovative research projects, identify appropriate policy instruments and incentive frameworks, and share relevant knowledge and technologies.

The three main agreements concluded in 2015, namely the 2030 Agenda, the Paris Agreement, and the Addis Ababa Action Agenda of the Third International Conference on Financing for Development, highlight the need to establish new partnerships and adopt solidarity-based approaches. Those agreements all underscore the importance of supporting projects and cooperation frameworks that promote regional integration, foster cooperation and encourage the exchange of experience and lessons learned, in particular in Africa.

In 2015, African Union Heads of State and Government adopted Agenda 2063, which provides a strategic framework for the long-term transformation of the continent. The initial 10-year implementation plan for that Agenda covers the period 2014-2023 and, in 2017, the Sustainable Development Goals Centre for Africa was established in Rwanda. Numerous continental initiatives to accelerate the achievement of a number of priority Sustainable Development Goals are already under way, including the African Agribusiness and Agro-industry Development Initiative, the African Renewable Energy Initiative and the Programme of Action for the Implementation of the Sendai Framework for Disaster Risk Reduction 2015-2030 in Africa.

A joint United Nations-African Union framework partnership agreement was adopted in January 2018 with a view to ensuring that 2030 Agenda and Agenda 2063 implementation and follow-up mechanisms adopt an integrated and streamlined approach. An action plan to operationalize that partnership agreement will be developed in 2018, and the Regional Coordination Mechanism for Africa will coordinate implementation of that action plan at the continental level, while the subregional coordination mechanisms will relay communications at the level of the five subregions.

---

110 The Regional Coordination Mechanism was established in July 1998 pursuant to Economic and Social Council Resolution 1998/46 to hold regular interagency meetings in each of the five regions. The mechanism promotes a coordinated response by the organizations of the United Nations system and development partners to the priority needs of each region. The Economic and Social Council regional commissions coordinate and provide follow-up to the meetings of the Mechanism.
3.1 Intra-Maghreb cooperation: largely unexploited trade opportunities

There is only very limited intra-regional integration among the Maghreb countries, which together account for a market of more than 90 million consumers, and those countries are poorly integrated into the global economy. Little progress has been made towards the establishment of a Maghreb free trade zone that would facilitate the movement of capital and people, and implementation of existing trade and investment agreements has been slow. Trade infrastructure deficits, onerous tariff regimes, and the failure of Governments to harmonize Maghreb country trade policies have all encouraged North-South vertical integration and a logic of bilateral negotiations with other regional economic blocs, thereby undermining horizontal links among the Maghreb countries themselves. Several countries are seeking to strengthen their relationships with the Economic Community of West African States (ECOWAS). Those countries include Mauritania, which has signed an association agreement with ECOWAS, Morocco, whose accession process is in progress, and Tunisia, which has obtained observer status. Tunisia is also expected to become an official member of the Common Market for Eastern and Southern Africa (COMESA) in 2018.

In 2012, ECA estimated that intra-Maghreb trade accounted for 3.35 per cent of the total external trade of the five countries. Intra-Maghreb foreign direct investment, which originates primarily in Morocco and Tunisia, remains limited. On the other hand, trade with European Union States accounts for some 70 per cent of total external trade and the four countries, and Morocco and Tunisia in particular, are signing increasing numbers of trade and partnership agreements with other African States.

The United States, China and India have also become important economic partners for the Maghreb countries. It should be noted that Morocco is now the leading intra-African investor and provided 41 per cent of foreign direct investment in sub-Saharan Africa between 2011 and 2015, making investments primarily in financial services, telecommunications, air transport and manufacturing. Exports by Morocco to West Africa tripled between 2008 and 2016, from 3.2 billion to 10.2 billion Moroccan dirhams, equivalent to an increase from €290 million to €900 million.

Between 2011 and 2015, Moroccan direct investment in West Africa increased fivefold, from 295 million to 1.6 billion Moroccan dirhams, with strong increases in Côte d’Ivoire and Mali in particular. Tunisia’s trade with sub-Saharan Africa has also increased in recent years.

Commodities, and in particular Algerian oil and natural gas, account for 68 per cent of intra-Maghreb exports. In 2012, manufactured goods accounted for only 31 per cent of intra-AMU trade. High-tech manufactured goods were only 8.5 per cent of total Maghreb trade. These low levels of trade are not due to the lack of trade opportunities, however. A study conducted by AMU on the mapping of

---

112 Office des changes, Morocco, 2017 report.
complementarities in the supply and demand of agricultural, agrifood and fisheries products among AMU countries revealed that there was significant potential for complementarities in agrifood trade among its member countries and highlighted a number of factors that impeded the full exploitation of that potential. The study recommended the harmonization of monetary and trade policies, agroindustry standards and the regulatory framework governing the trade in agrifood products, as well as the development of logistics networks to facilitate the trade in those products and the emergence of specialized stakeholders along supply chains. In the energy field, existing links have so far failed to spur further Maghreb cooperation, despite the recommendations of numerous regional conferences that have called for the implementation of joint energy development projects and intra-Maghreb partnership projects. The integration of Maghreb electricity networks is proceeding slowly and electricity markets remain highly protected. For example, trade between Tunisia and Algeria accounts for barely 2 per cent of Tunisian national consumption and energy links operate at one-tenth of their capacity. A major gas pipeline project linking Morocco and Nigeria via West Africa that will strengthen the development of the energy sector throughout the region is planned.

The exploitation of comparative advantages, complementarities among countries and successful experiences provides trade opportunities in a number of sectors:

- **Agriculture**: potential improvements could be made in terms of productivity, processing, sector diversification, natural resource management and investment, in particular from the private-sector. The Green Morocco Plan promotes South-South cooperation as a priority for action and underscores the potential benefits of such cooperation for African countries, including the sharing of experiences gained with regard to agricultural credit, climate change resilience and the sustainable management of natural resources. A number of agricultural cooperation agreements with sub-Saharan African countries have already been implemented. Morocco exports fertilizers to Africa that are affordable for African farmers and are particularly adapted to local soils and crops, with exports totalling 1.3 million tons in 2014. In 2010, Algeria and Tunisia concluded an agricultural cooperation agreement and, in 2012, signed a memorandum of understanding on agricultural research. In 2016, Mauritania and Morocco concluded a framework partnership agreement on oasis development and scientific research. Under the terms of a wheat introduction programme supported by the Arab Organization for Agricultural Development (AOAD), Mauritania is receiving wheat seed from Algeria, Egypt and Morocco, and those countries are sharing their experiences with regard to innovative irrigation techniques. Mauritania also cooperates with Algeria, Morocco and Tunisia in the fields of locust control, plant protection, crop diversification and agricultural research.

- **Energy**: Cooperation and the pooling of resources for the development of renewable power generation should be key regional priorities. Countries are now able to share their respective experiences in the development of wind, photovoltaic and concentrated solar power generation, including with regard to innovative technologies, regulatory advances, energy pricing and financing mechanisms. Synergies among existing research centres in
the field of renewable energy are not sufficiently exploited and electricity grids\textsuperscript{113} linking countries continue to operate below capacity. In 2009, Algeria and Tunisia signed a memorandum of understanding on energy management and renewable energies.

- Climate change: The Climate Change Competence Centre of Morocco was established to promote knowledge and technology sharing in the field of climate resilience, including at the regional level. The Centre has signed partnership agreements with the Foundation for Peace and Environmental Preservation in the Congo and with United Cities and Local Governments of Africa.

- The Nationally Determined Contributions Partnership, which was launched at the twenty-second session of the Conference of the Parties to the Framework Convention on Climate Change and is co-chaired by Germany and Morocco, facilitates efforts by countries in the global South to implement their national determined contributions and gain access to financial resources and institutional and technical capacity-building support with a view to combating climate change. Morocco and Tunisia have already received support through the Partnership.

- Industry: There are vast opportunities for cooperation to strengthen productive capacities, promote industrial complementarity and develop intra-Maghreb value chains, in particular in the automotive, mechanical, pharmaceutical, agrifood and renewable energy sectors.

- Disaster risk reduction: the Programme of Action for the Implementation of the Sendai Framework for Disaster Risk Reduction 2015–2030 in Africa was adopted in 2016. The Programme of Action provides strategic direction to integrate disaster risk reduction into regional and national sustainable development and climate change adaptation strategies and to mobilize domestic resources to increase the funds allocated for disaster risk reduction in national budgets. It is accompanied by a five-year action plan which will be implemented and monitored at the subregional level through subregional platforms established in East, West, Central and Southern Africa and existing subregional action plans. Only North Africa has yet to develop those instruments.

3.2 Well-defined subregional priorities but no elaboration of strategic frameworks

This chapter analyses the vision and strategic objectives established by AMU for each of the report’s thematic areas, the relevance of those objectives to the Sustainable Development Goals, and assesses progress made towards their achievement.

\textsuperscript{113} Morocco-Algeria (1,200 MW interchange capacity). Mauritania-Morocco (currently being studied: study to be completed by 2022).
While regional priorities are fairly clearly defined, few strategic frameworks have been elaborated to guide action by Maghreb countries and no quantified objectives have been established at the Maghreb level. Moreover, while countries share similar strategic challenges, national policies are rarely designed with the objective of promoting intra-Maghreb cooperation.

Strengthening regional cooperation with a view to implementing the 2030 Agenda, could significantly enhance efforts to address the common challenges facing Maghreb countries, in particular those related to unemployment, social inequality, the fragility of productive systems and the four countries’ continuing reliance on technological, financial, trade, food and energy sector relationships with non-Maghreb countries. To that end, AMU and member countries must redouble their efforts to translate the many commitments made in the context of AMU agreements into concrete actions and must work together to resolve issues of common interest. Shared efforts are needed, in particular, to harmonize policies and regulations, stimulate intra-regional agrifood trade, create regional value chains, foster the development of cross-border energy infrastructure and promote the exchange of knowledge and experience and technology transfer.

**Thematic area 1: Food security**

Food security remains a structural challenge for all Maghreb countries; although significant progress has been achieved in recent years, the area of irrigated land remains limited and agriculture remains highly dependent on the vagaries of the climate.

The Maghreb strategic vision for agriculture for the period to 2030, adopted in 2010 by the AMU Ministerial Committee on Food Security, underlines the important role played by agriculture in the economic and social development of the Maghreb countries and underscores that the elaboration of a common agricultural policy and the adoption of a progressive approach to economic cooperation and integration among Maghreb countries would facilitate the achievement of sustainable food security.

<table>
<thead>
<tr>
<th>2030 Agenda for Sustainable Development: End hunger, achieve food security and improved nutrition and promote sustainable agriculture (Goal 2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMU Agenda: Strategic Vision for Agriculture to 2030 and 2011–2020 Action Plan Corresponding targets: 2.3, 2.4 and 2.A</td>
</tr>
<tr>
<td>Strategic objectives (non-quantifiable targets)</td>
</tr>
<tr>
<td>• Increase agricultural investments and investments in agricultural research (threshold: 1.5 per cent of GDP);</td>
</tr>
<tr>
<td>• Increase agricultural production and reduce dependence on cereal imports;</td>
</tr>
<tr>
<td>• Develop Maghreb agricultural trade and accelerate efforts to create a free trade area for agricultural products;</td>
</tr>
<tr>
<td>• Reduce the vulnerability of the agricultural sector to climate change and water scarcity;</td>
</tr>
<tr>
<td>• Sustainably improve farmers’ incomes;</td>
</tr>
<tr>
<td>• Create agricultural sector jobs for women and young people.</td>
</tr>
</tbody>
</table>
Implementation evaluation

As part of its efforts to implement the 2011-2020 action plan, AMU is collaborating with FAO on several technical cooperation projects with a view to controlling cross-border agricultural pests and diseases, strengthening the role of professional organizations working to enhance food security in the Maghreb, harmonizing agricultural policies and promoting decent employment for young people in agriculture. AMU is also working with FAO to evaluate and update the strategic vision for agriculture to 2030 prior to the completion of the 2011-2020 action plan, and is collaborating with the African Union-ECA-African Development Bank joint initiative on land policy in Africa on a regional initiative that will facilitate the exchange of experiences and strengthen cooperation on land governance in the Maghreb countries.

Progress in terms of trade integration has been slow and intra-Maghreb trade is still less than 3 per cent of the countries’ total trade with the rest of the world, even though there is significant potential for increasing trade among the Maghreb countries in horticultural and fisheries products. This is partly due to difficulties related to the ratification or implementation of a number of conventions, including the Convention on the Trade in Agricultural Products among AMU countries (ratified by AMU in 1993), the Maghreb Trade and Tariff Convention (signed by AMU in 1991) and the Maghreb Unified Customs Nomenclature (signed by AMU in 2013). The countries have also signed numerous bilateral and multilateral trade and tariff agreements and conventions aimed at strengthening economic ties and trade. However, implementation of those agreements and conventions remains incomplete.

Integration is also hampered by tariff and non-tariff protections, the lack of regional rules of origin, weak logistics networks and the low prices of goods in domestic markets.

Improving agricultural productivity in areas that are highly vulnerable to climate change will require the installation of advanced irrigation systems and increased investment in agricultural research. However, investments in agricultural research in all countries fall well below the 1.5 per cent of GDP target set by AMU. Indeed, the four Maghreb countries invest less than 1 per cent on GDP in agricultural research, which is well below the average rate of 2.4 per cent for OECD countries and the average rate of 1.5 per cent achieved by successful Latin American countries (African Development Bank, 2016).

Thematic area 2: Energy transition

The Maghreb countries have common strategic interests in terms of meeting growing energy demand, ensuring energy security, reducing generation costs, promoting the large-scale development of renewable energy power generation, strengthening local industrial integration, promoting energy efficiency and exporting any potential surplus energy produced. No regional strategy has been developed, however, to guide and support States’ efforts in those areas. At its ninth session, held in Rabat in November 2010, the AMU Ministerial Committee on Energy and Mines reiterated the need to strengthen cooperation in the areas of power generation and trade, in particular from renewable energy sources, with the long-term aim of establishing a Maghreb regional electricity market.

The thirteenth session of the Maghreb Interministerial Commission for the Economy and Finance, held in Tunis in June 2013, explicitly recommended the development of a unified Maghreb strategy on renewable energy, whose objectives would include:

- Strengthening interconnections between countries’ electricity grids;
- Increasing trade in goods and services;
- Promoting the convergence of regulatory and technical standards;
- Creating competitive regional industrial sectors;
Establishing partnerships in the areas of production, trade, skills development and research and development.

<table>
<thead>
<tr>
<th>2030 Agenda for Sustainable Development: Ensuring access to affordable, reliable, sustainable and modern energy for all (Goal 7)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AMU Agenda: no regional strategy in place</strong></td>
</tr>
<tr>
<td><strong>Corresponding targets</strong>: 7.2 and 7.3</td>
</tr>
<tr>
<td><strong>Target 7.1</strong>: referred to indirectly</td>
</tr>
</tbody>
</table>

**Strategic objectives**

- Improve energy market integration through the development and strengthening of electricity interconnections among countries and the harmonization of rules and standards;
- Develop and implement projects of common interest that facilitate trade in electricity;
- Increase investment in renewable energy and promote its use in agriculture;
- Promote energy efficiency;
- Promote the creation of competitive regional industrial sectors that generate economic value and sustainable jobs;
- Improve cooperation to foster skills development, technology transfer, industrial partnership development and financing mobilization.

**Implementation evaluation**

Existing links among the countries’ electricity grids remain underused. That is in particular the case for the main power lines linking Algeria and Morocco, where only 1,200 MW of a total capacity of 200 GW is currently used, and the lines linking Algeria and Tunisia, which can only carry 400 KV. In reality, those links form part of an assistance framework that provides mutual electricity back-up between countries and net-zero offsetting. The commercial electricity market among the Maghreb countries remains modest.

An agreement has been concluded on emergency electricity trade between Algeria and Morocco, as has another agreement allowing Algeria to export electricity to Spain via Morocco, which involves the Algeria-Spain gas pipeline. Algeria and Morocco have, moreover, signed an agreement on the sale of 640 million m3 of natural gas between 2011 and 2021. Algeria is also Tunisia’s leading natural gas supplier and provides 58 per cent of that country’s needs; Tunisia receives 5.25 per cent of the natural gas transiting through its territory by means of the Algeria-Italy gas pipeline in lieu of transit fees.

The Maghreb countries have adopted ambitious energy policies but have paid little attention to the specific interests of the Maghreb region itself. Instead, they tend to focus on strengthening their links with Europe, whether within the context of the Euro-Mediterranean partnership, or bilaterally, including through strategic partnerships with the European Union, such as the project to increase the trade between European States and Morocco in electricity generated from renewable energy sources. Algeria is the third largest supplier of natural gas to the European Union. Mauritania and Morocco are now formulating a plan that would link their respective electricity grids.

There has been little progress in terms of coordinating and cooperating on the implementation of renewable energy programmes or in terms of pooling the countries’ research and development efforts. Morocco and Tunisia concluded cooperation and partnership agreements for the development of solar energy in 2012 and 2014. There is also significant potential for collaboration between specialized institutions, such as the Research Institute for Solar Energy and New Energies (IRESEN), the Institute of Training in Renewable Energies and Energy Efficiency Businesses (IFMEREE) and the Climate Change Competence Centre, which are all located in Morocco, and the Renewable Energy Development Centre in Algeria.

**Thematic area 3: youth employment**

Youth employment is a key priority of AMU. The underemployment of young people has a considerable economic and social cost: it threatens economic growth,
exacerbates exclusion, social instability and emigration and impedes sustainable development.

The ninth meeting of AMU ministers of training, employment and social affairs, held in Rabat, Morocco in 2010, recommended the development of a Maghreb-wide strategy to combat youth unemployment. That strategy should promote synergies among national employment strategies, strengthen cooperation among youth employment agencies in Maghreb countries, promote the sharing of experiences and expertise, support youth entrepreneurship, promote vocational training reform and stimulate regional labour markets.

The fourteenth session of the Maghreb ministerial commission on human resources, held in Nouakchott in 2015, stressed the need to develop a strategy that addressed the situation of young people in the Maghreb, on the basis of the results of a 2012 study by AMU in that regard.

| 2030 Agenda for Sustainable Development: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all (Goal 8) |
|---|---|
| AMU Agenda: no regional strategy in place |
| Strategic objectives (non-quantifiable targets) |
| Corresponding targets: 8.5, 8.6 and 8.B |
- Improve access to economic and educational opportunities for young people and women;
- Promote decent work for young people in rural areas, in particular in the agricultural sector;
- Develop a unified policy for young people who have dropped out of school to be enrolled in vocational training institutions;
- Promote coordination, cooperation and the exchange of best practices among national youth employment agencies;
- Improve vocational training programmes and identify training needs;
- Promote entrepreneurship among women and young people

Implementation evaluation

With the support of FAO, AMU has initiated a regional project to promote decent agricultural employment for young people in rural areas of the Maghreb countries. The project seeks to analyse the factors impeding youth employment in rural areas in each of the four countries, to develop national programmes and action plans to promote decent agricultural employment for young people in rural areas, to establish a system for monitoring youth employment in rural areas, to strengthen the capacities of institutions concerned with youth employment in rural areas and to develop a standard framework of indicators to track youth employment in rural areas.

**Thematic area 4: Industrial transition**

The Maghreb industrial environment, 90 per cent of which is made up of small and medium-sized enterprises, is characterized by a lack of competitiveness and low levels of integration into regional and global value chains. Industry has limited capacity to create added value or to integrate new technologies and mostly employs a low-skilled workforce. Since most business is located near coastal ports, regional imbalances within industry are further exacerbated.
AMU recognizes the need to develop a Maghreb-wide industrial strategy and to support joint projects that create wealth, stimulate job creation and encourage innovation in the region. Given their significant resources, including energy (oil, gas and renewable energy), minerals (iron and phosphates), agriculture (olive oil and dates) and fisheries, there is considerable potential for the four Maghreb countries to develop integrated industrial sectors.

<table>
<thead>
<tr>
<th>2030 Agenda for Sustainable Development: Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation (Goal 9)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMU Agenda: no regional strategy in place</td>
</tr>
<tr>
<td>Strategic objectives (non-quantifiable targets)</td>
</tr>
<tr>
<td>Corresponding targets: 9.2, 9.5 and 9.B</td>
</tr>
</tbody>
</table>

- Diversify economies and promote sectors that create value-added jobs in order to stimulate sustained and sustainable growth;
- Improve export capacities and enhance complementarity among the countries’ economies;
- Develop complementary industrial strategies aimed at coproducing and developing regional industrial success stories in sectors such as agrifood, textiles, automobiles, aeronautics, digital technology, health and energy;
- Improve national research performance and innovation

**Implementation evaluation**

In 2012, manufactured goods accounted for only 31.34 per cent of trade among AMU countries. High-tech manufactured products requiring highly-skilled labour represented only 8.5 per cent of total Maghreb-produced goods.

**Thematic areas 5 and 6: Climate change and combatting desertification**

The Maghreb is particularly vulnerable to climate change and natural disasters. Such phenomena exacerbate desertification and land degradation, water deficits, food insecurity, population vulnerability and the depopulation of rural areas.

In order to implement their nationally determined contributions, the four Maghreb countries have made commitments to enhance their energy consumption management, promote clean modes of transport, optimize the use of water resources, in particular for agricultural irrigation, and reduce greenhouse emissions through the development of renewable energies.

Efforts by the countries to improve their resilience to climate change are still limited by financing difficulties, inadequate understanding of climactic scenarios and vulnerability, and skills and technology gaps that impede efforts to address climate change-related challenges. The countries should step up their efforts to formulate national climate adaptation programmes, which should incorporate input from all relevant stakeholders, including economic players, local authorities and the research community. Similarly, improved climate policy oversight is necessary to enhance synergies at the sectoral and territorial levels and harmonize adaptation and mitigation measures.
### 2030 Agenda for Sustainable Development: Take urgent action to combat climate change and its impacts (Goal 13)

**AMU Agenda:** no regional strategy in place  
**Strategic objectives (non-quantifiable targets)**  
**Corresponding target:** 13.2

- Develop regional projects and a Maghreb-wide strategy for adapting agriculture practices in the light of climate change;  
- Develop a regional tool to predict future climate scenarios for the Maghreb using global circulation models;  
- Establish a Maghreb network for research on climate change and agriculture;  
- Set up a Maghreb database on climate change and agriculture;  
- Share experiences in the area of climate risk management;  
- Anticipate the impact of climate change on water resources.

**Implementation evaluation**  
AMU is seeking to develop a Maghreb-wide strategy for climate change adaptation, as recommended by the 2008 Fez Conference on Agriculture in the Maghreb.

### 2030 Agenda for Sustainable Development: Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss (Goal 15)

**AMU Agenda:** Subregional action plan for combating desertification  
**Strategic objectives (non-quantifiable targets)**  
**Corresponding targets:** 15.2 and 15.3

- Implement a subregional programme of action to combat desertification in order to limit desertification and the loss of arable land.

**Implementation evaluation**  
AMU adopted its first subregional programme of action to combat desertification in 1999. That programme was then revised in line with objectives of the 2008–2018 strategy for the implementation of the United Nations Convention to Combat Desertification and lessons learned in the implementation of the first subregional programme of action, which ended in 2009. The revised version strengthened synergies with other Maghreb strategic frameworks, including the Maghreb Charter for the Protection of the Environment, and the Maghreb Strategic Vision for Agriculture to 2030. The 2011–2020 subregional programme of action to combat desertification, which was endorsed at the sixteenth session of the Ministerial Committee on Food Security, held in Algiers, Algeria in December 2010, aims to develop trans-border partnerships among AMU member countries that strengthen synergy among the countries of the subregion. The updated subregional programme comprises four key objectives, namely: capacity-building and awareness-raising among stakeholders; technology transfer and resource mobilization; supporting research, in particular on climate change adaptation; and the establishment of a Maghreb drought early warning system. Little progress has been achieved towards implementation of that programme, however.

### 3.3 Role of AMU in implementing the 2030 Agenda and Agenda 2063 and the intervention framework

AMU plays an important role in supporting member countries as they implement and monitor the 2030 Agenda and Agenda 2063. Member countries must catch up with their peers and adopt an approach that promotes national ownership, stakeholder engagement and partnerships that bolster resource mobilization and capacity-building. Countries must develop integrated policies that will have measurable
impacts on local populations, and in particular on the most vulnerable members of their societies. AMU must also strengthen its leadership role in regional coordination in order to strengthen synergies among development partner interventions at the subregional level with a view to pooling resources and enhancing the impact of those interventions. Meetings of the subregional coordination mechanism, which are chaired jointly by AMU and ECA, provide a platform for AMU and its partners to discuss important regional interventions, identify areas for cooperation and monitor the implementation of initiatives. Finally, in the light of its intermediary role at the national and continental levels, AMU must play a key role in all monitoring and evaluation processes.

In the light of the above and the identified gaps that impede the elaboration of common policies and the implementation and monitoring of regional commitments, the AMU should take action to achieve five key objectives:

**Objective 1: Develop a sustainable development strategy for the Maghreb that will support efforts by AMU member countries to achieve the Goals and implement Agenda 2063**

That strategy should facilitate efforts by AMU to integrate the Goals and key targets for the subregion into its overall work programme; it should provide guidance to the AMU technical commissions and regional cooperation and integration initiatives. It should also facilitate efforts to address regional objectives and programmes through national plans and support the coordinated implementation of interventions at both the national and regional levels. This will strengthen the role of AMU in consultative forums, including African and Arab-world regional forums on sustainable development, and will enhance cooperation with the African Union, regional economic communities, United Nations agencies and development partners.

**Objective 2: Ensure regular monitoring of progress achieved, the situation on the ground and the prospects for sustainable development in Maghreb countries**

- Establish a Maghreb database to promote the production and dissemination of data on sustainable development in the subregion;

- Prepare a regular report or matrix on the implementation of the recommendations and decisions of technical commissions and ministerial meetings in order to ensure appropriate follow-up;

- Develop a regional framework of indicators and prepare a regional follow-up report every two years to monitor the achievement of the Goals and Agenda 2063, in line with the parameters of a new continent-wide monitoring framework. That follow-up report will support African and Arab-world research conducted within the context of regional forums on sustainable development and will facilitate efforts by AMU to raise awareness in the region and among the international community of issues that are pertinent to the subregion.
Objective 3: Develop a capacity-building programme for AMU staff

- Identify capacity-building needs and potential partnerships;
- Develop and implement capacity-building programmes for staff.

Objective 4: Facilitate the sharing of knowledge, experiences and best practices among member countries

- Conduct studies on, and raise awareness among member countries of priority issues such as cross-border concerns and emerging challenges, including migration and natural disaster management;
- Organize regular forums for the Maghreb countries to facilitate the sharing of information and best practices with regard to sustainable development issues;
- Develop a mechanism that will allow AMU to share information and experiences with other regional economic groups;
- Organize a regional dialogue on cross-cutting issues, including public policy integration, resource mobilization strategies for achieving the Goals, governance, and gender mainstreaming.

Objective 5: Promote special initiatives and strengthen partnerships

- Identify regional initiatives and mobilize the necessary partnerships to facilitate their implementation in strategic areas, including: regional food and energy security, sustainable management of natural resources, desertification, adaptation to climate change and natural disaster management;
- Develop and implement subregional initiatives in support of continent-wide initiatives and programmes launched by the African Union;
- Facilitate technical cooperation and capacity-building among countries in key areas, including, statistics, skills training and technological research and innovation;
- Pool the efforts of specialized research and training institutions, and in particular institutions that focus on the region.

Key recommendations

Although two years have passed since the adoption of the 2030 Agenda, little has been done to facilitate progress towards the achievement of the Goals in the Maghreb countries. Governments have, by and large, been slow to establish national objectives and targets, and to put in place an adequate governance framework to support the development and implementation of integrated, coherent and inclusive policies that
can address the complex and interrelated challenges of the Goals. Apart from a small number of initiatives, which are still in their infancy, contributions from civil society and the private sector are minimal.

The recommendations below reflect a number of challenges that need to be addressed in the Maghreb countries in order to accelerate implementation of the 2030 Agenda and the achievement of the Goals.

(a) General recommendations

Leadership and the inclusion of stakeholders
In order to foster national and local ownership and ensure that the Goals are addressed in planning and budget processes at the national, sectoral and local levels, strong institutional leadership and a clear road map are essential. That road map should be implemented together with a communication strategy that engages all stakeholders, including sectoral departments, the private sector, local authorities and civil society. The communication strategy should focus on the Goals, institutional responsibilities and stakeholder interests, in order to ensure the full involvement of all actors in planning, implementation and monitoring activities. Efforts to promote the effective engagement of civil society entities should promote their participation in institutional bodies and seek to strengthen their organizational and intervention capacities. Efforts should also be made to involve small and medium-sized enterprises in efforts to achieve the Goals, including through incentive regimes and by encouraging large national companies that have adopted sustainable practices and have successfully switched over to ecologically-friendly production and business methods to share their experiences and best practices with small and medium-sized enterprises.

Ensuring the coherence and coordination of national, sectoral and territorial public policies
This is essential, given the multidimensional nature and interdependence of the Goals. Each Goal is to be achieved through targets that combine various dimensions of sustainable development, and those dimensions make it possible to identify synergies among public policies. For example, the Goal 9 targets reflect the fact that industrialization policies not only impact employment and growth, but can also impact inequality (by facilitating infrastructure access), and sustainable production and consumption (by promoting efficient resource usage). Addressing the challenges of policy coherence requires the establishment of an effective institutional framework that strengthens coordination and cooperation at all levels. It is therefore important to establish close linkages between new institutional frameworks and existing consultative or coordination bodies, including national councils or commissions for the environment and sustainable development, which have been established in all four countries.

Countries should review the focus of their national strategies for sustainable development and associated national development strategies and plans and must strive to enhance policy coherence for sustainable development (target 17.14).
Improving the availability of data and building statistical capacity for monitoring the Goals remains a major challenge for all countries

The availability and reliability of statistical information are crucial for decision-making and the formulation of public development policies, in particular in the context of countries’ efforts to implement the 2030 Agenda and achieve the Sustainable Development Goals.

Countries should significantly increase investments in statistical capacity-building in order to create efficiently integrated information systems. This report highlights the challenges related to the consistency of national statistics provided by statistical institutes and sectoral statistics. Further efforts are needed to develop and harmonize measurement standards and methodologies. There is also a need to strengthen coordination and cooperation among institutions that produce statistics. In addition, mechanisms for monitoring the Goals must be established by building on existing information systems, such as environment and sustainable development monitoring centres, and by improving the quality, quantity and reliability of data. Measures such as these should make it possible to close the current gap in the monitoring and evaluation of public and sectoral policies.

Financing and budgeting for the Goals

All available financing mechanisms and approaches, including tax reform, grant reform, insurance mechanisms, financial instruments for risk management, green bonds and multi-stakeholder partnerships, must be exploited to ensure that the Sustainable Development Goals are fully achieved. Particular focus should be placed on raising funds through the banking system and by leveraging private, national and international capital. It is also critical that national budgets allocate existing resources more effectively. Governments should also seek to leverage domestic private-sector savings and orient foreign direct investment, which tends to be concentrated in only a limited number of sectors, towards initiatives that will facilitate the achievement of the Goals.

There is a growing interest among international investors in the Goals, and many of those investors have prioritized sustainable development and integrated it into their development strategies. In order to make the most of the expanding range of financing options available, the Maghreb countries must develop strong institutional and regulatory frameworks. South-South cooperation is also an important vehicle for fund mobilization.

Regional South-South cooperation

This could play an important role, and could facilitate efforts by the countries to enhance electricity grid connectivity, exploit renewable energy sources, increase energy efficiency and promote cooperation in research and development, training and industrial partnerships.

(b) Thematic recommendations

- In the light of its economic, social and ecological implications, the agricultural sector must remain an investment priority. Greater attention should be paid to improving the productivity and incomes of smallholder farmers by facilitating their access to credit, land, skills training and innovative
technologies. Focus on the agricultural sector is particularly important given its high vulnerability to the negative impact of climate change;

• The issue of unemployment among young people and women must be addressed by adopting a comprehensive and coordinated approach that provides for a series of mutually reinforcing measures. Efforts to address unemployment should promote economic diversification, the integration into the formal economy of the informal sector, which currently provides employment to most young people in jobs, and the reduction of social and territorial inequalities. National employment objectives should be integrated into sectoral policies and programmes at the local and regional levels. In addition, greater attention should be focused on promoting decent work by strengthening social dialogue, social protections, respect for international labour standards and access to vocational training. It is critical to address gaps between workers’ skills and the needs of economic sectors and to enhance entrepreneurial support mechanisms. To optimize such efforts, it is important to evaluate the effectiveness of employment promotion policies and mechanisms and their impact on the labour market on a regular basis. It is also important to strengthen coordination among programmes and mechanisms and to establish a comprehensive monitoring and impact assessment system for all such programmes and mechanisms.

• Efforts to promote energy efficiency and energy transitioning must be further strengthened;

• Overall, industrial sector performance remains below its potential, despite the fact that Morocco and Tunisia have made remarkable strides in this area. Ongoing challenges relate to market competitiveness, productivity, inclusiveness and sustainability, and efforts must be made to promote more decentralized, diversified and higher value-added production that can create high-quality jobs, in particular for tertiary education graduates. To improve their industrial competitiveness, the four countries must foster the development of higher-value added activities, strengthen synergies, harmonize value chains and support technological development. The contribution of industry to national research and development and innovation efforts remains marginal. To improve competitiveness and promote industrial integration, it is essential to foster innovation and technological development. Furthermore, climate risk adaptation, greenhouse gas emission reduction and energy efficiency must be addressed in industrial policies.

• The Maghreb countries are highly vulnerable to the effects of climate change. To improve the effectiveness of any action taken to address climate-related challenges, the countries will need to align their nationally determined contributions and national action plans with the Sustainable Development Goals. Knowledge gaps continue to impede efforts to conduct detailed assessments of major disaster risks and ensure that those risks are addressed in national planning, investment and development decisions. The four countries must adopt structured and more inclusive multi-
hazard management policies and enhance coordination among relevant stakeholders in that area, including ministerial departments and public and semi-public organizations;

- Policies to promote innovation lack an overarching vision and there are few mechanisms to facilitate the involvement of the private sector or ensure effective policy coordination, monitoring and follow-up. Furthermore, none of the countries have so far complied with the recommendation of the African Union that at least 1 per cent of GDP should be spent on research and development. Particular attention should be given to agricultural, industrial and environmental innovation in order to encourage sector development and increase added value. All national innovation strategies should promote the engagement of business enterprises in research so as to provide research projects with an economic and development perspective.
Annex

**Tables:** Agriculture as a share of GDP (per cent)

<table>
<thead>
<tr>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>8.4</td>
<td>11.7</td>
<td>12.3</td>
</tr>
<tr>
<td>Mauritania</td>
<td>29.3</td>
<td>26.5</td>
<td>26.4</td>
</tr>
<tr>
<td>Morocco</td>
<td>13.5</td>
<td>14</td>
<td>12.2</td>
</tr>
<tr>
<td>Tunisia</td>
<td>8.2</td>
<td>10.5</td>
<td>10.1</td>
</tr>
</tbody>
</table>

Agricultural employment (percentage of the total labour force)

<table>
<thead>
<tr>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>10.5</td>
<td>7.7</td>
<td>7.1</td>
<td>Decreasing</td>
</tr>
<tr>
<td>Mauritania</td>
<td>22.0</td>
<td>28.0</td>
<td>34</td>
<td>Increasing</td>
</tr>
<tr>
<td>Morocco</td>
<td>40.3</td>
<td>38</td>
<td>39/50</td>
<td>Decreasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>16.0</td>
<td>15.0</td>
<td>15</td>
<td>Slightly decreasing</td>
</tr>
</tbody>
</table>

National cereal requirements covered by domestic production rates (per cent)

<table>
<thead>
<tr>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>49.3</td>
<td>28.9</td>
<td>24.7</td>
</tr>
<tr>
<td>Mauritania</td>
<td>34.0</td>
<td>34.0 (2014)</td>
<td>45.0</td>
</tr>
<tr>
<td>Morocco</td>
<td>56.5</td>
<td>65.1</td>
<td>31.0</td>
</tr>
<tr>
<td>Tunisia</td>
<td>42.0</td>
<td>44.0</td>
<td>63.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>61.0/76.0</td>
</tr>
</tbody>
</table>

Irrigated agricultural land (as a percentage of total usable agricultural area)

<table>
<thead>
<tr>
<th>2010</th>
<th>2015</th>
<th>2016 (reference)</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>11.0</td>
<td>14.5</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Mauritania</td>
<td>27.0</td>
<td>34.0</td>
<td>37.0</td>
<td>Increasing</td>
</tr>
<tr>
<td>Morocco</td>
<td>17.0</td>
<td>17.0</td>
<td>18.0</td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>7.5</td>
<td>8.0</td>
<td>8.0</td>
<td>Slightly increasing</td>
</tr>
</tbody>
</table>
Land irrigated using water-efficient techniques (as a percentage of total irrigated land)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>37.2 (2009)</td>
<td>49.8 (2014)</td>
<td>65.0 (2020)</td>
<td>Increasing</td>
<td></td>
</tr>
<tr>
<td>Mauritania</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>16.6</td>
<td>28.1</td>
<td>31.2</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td></td>
<td></td>
<td></td>
<td>89.0</td>
<td>93.0 (2020)</td>
</tr>
</tbody>
</table>

Public investment in agricultural research (as a percentage of total investment in the agricultural sector)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>No data</td>
</tr>
<tr>
<td>Mauritania</td>
<td>0.05</td>
<td>0.09</td>
<td>0.09</td>
<td>0.1/0.5</td>
<td>Largely inadequate</td>
</tr>
<tr>
<td>Morocco</td>
<td>1.2</td>
<td>1.9</td>
<td>1.7</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>No data</td>
</tr>
</tbody>
</table>

Proportion of total population with access to electricity – target 7.1 (per cent)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>99.0</td>
<td>99.9</td>
<td></td>
<td></td>
<td>Almost universal access</td>
</tr>
<tr>
<td>Mauritania</td>
<td>30.0 (2008)</td>
<td>38.8 (2014)</td>
<td>70.0/85.0</td>
<td>Limited access</td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>98.4</td>
<td>99.58</td>
<td>99.72</td>
<td></td>
<td>Almost universal access</td>
</tr>
<tr>
<td>Tunisia</td>
<td>99.4</td>
<td>99.8</td>
<td>99.8</td>
<td></td>
<td>Almost universal access</td>
</tr>
</tbody>
</table>

National unemployment rate (per cent)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>10.0</td>
<td>11.2</td>
<td>10.5</td>
<td></td>
<td>Relatively stable</td>
</tr>
<tr>
<td>Morocco</td>
<td>9.1</td>
<td>9.7</td>
<td>9.9</td>
<td>8.5 (2021)</td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>13.0</td>
<td>15.2</td>
<td>15.6</td>
<td>12.0 (2020)</td>
<td>Increasing</td>
</tr>
</tbody>
</table>
### Youth unemployment rate (persons aged 15–24) (per cent) – indicator 8.5.2

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>21.5</td>
<td>29.9</td>
<td>26.7</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Mauritania</td>
<td>31 (2014)</td>
<td>22.9</td>
<td></td>
<td></td>
<td>Decreasing</td>
</tr>
<tr>
<td>Morocco</td>
<td>17.6</td>
<td>20.8</td>
<td>22.5</td>
<td>-</td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>29.4</td>
<td>35.0</td>
<td>34.9</td>
<td></td>
<td>Increasing</td>
</tr>
</tbody>
</table>

### Female unemployment rate (per cent)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>19.1</td>
<td>16.6</td>
<td>20.0</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Mauritania</td>
<td>15.03 (2012)</td>
<td>19.3 (2014)</td>
<td>19.0</td>
<td>18.5/17.5</td>
<td>Increasing</td>
</tr>
<tr>
<td>Morocco</td>
<td>9.6</td>
<td>10.5</td>
<td>10.9</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>18.9</td>
<td>22.2</td>
<td>23.5</td>
<td></td>
<td>Increasing</td>
</tr>
</tbody>
</table>

### Unemployment rate for tertiary education graduates (per cent)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>21.4</td>
<td>14.1</td>
<td>17.7</td>
<td></td>
<td>Increasing since 2015</td>
</tr>
<tr>
<td>Morocco</td>
<td>18.1</td>
<td>21.2</td>
<td>21.9</td>
<td></td>
<td>Increasing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>33.6</td>
<td>28.1</td>
<td>30.5</td>
<td></td>
<td>Increasing</td>
</tr>
</tbody>
</table>

### Proportion of young people (aged 15–24 years) not in education, employment or training (per cent) - indicator 8.6.1

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mauritania (aged 15-34 years)</td>
<td>-</td>
<td>-</td>
<td>44.2</td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>27.9</td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

### Manufacturing value added as a proportion of GDP (per cent) – indicator 9.2.1

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>5.1</td>
<td>5.4</td>
<td>5.6</td>
<td></td>
<td>No change</td>
</tr>
<tr>
<td>Mauritania</td>
<td>6.6</td>
<td>6.5</td>
<td>6.5</td>
<td>7.0/8.0</td>
<td>No change</td>
</tr>
<tr>
<td>Morocco</td>
<td>15.13</td>
<td>15.9</td>
<td>23.0 (2020)</td>
<td>No change</td>
<td></td>
</tr>
<tr>
<td>Tunisia</td>
<td>16.5</td>
<td>15.28</td>
<td>14.91</td>
<td>Diminishing</td>
<td></td>
</tr>
</tbody>
</table>
**Manufacturing employment as a proportion of total employment (per cent) – indicator 9.2.2**

<table>
<thead>
<tr>
<th>Country</th>
<th>2010</th>
<th>2015</th>
<th>2016</th>
<th>2020/2030 targets</th>
<th>Trends</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>13.7</td>
<td>13.0</td>
<td>13.5</td>
<td></td>
<td>Stable</td>
</tr>
<tr>
<td>Mauritania</td>
<td>6.8 (2013)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Morocco</td>
<td>10.6</td>
<td>9.9</td>
<td></td>
<td></td>
<td>Diminishing</td>
</tr>
<tr>
<td>Tunisia</td>
<td>18.4</td>
<td>18.48</td>
<td>18.35</td>
<td></td>
<td>Stable</td>
</tr>
</tbody>
</table>
Bibliography


- UNESCO. “Combien de pays investissent dans la recherche-développement (137 pays dont 32 pays africains)”, 2016.


Algeria


- People's Democratic Republic of Algeria. Intended Nationally Determined Contribution – Algeria, 3 September, 2015.


Mauritania

- Islamic Republic of Mauritania, Ministry of the Environment and Sustainable Development. Évaluation globale des documents stratégiques majeurs de
la politique environnementale et de développement durable en Mauritanie, January 2017.


**Morocco**


- Kingdom of Morocco, nationally determined contribution of Morocco under the United Nations Framework Convention on Climate Change.


• Kingdom of Morocco. nationally determined contribution of Morocco, 2016.

• Kingdom of Morocco, Ministry of Employment and Social Affairs; ILO. Note synthétique de politique - Investir dans l’emploi des jeunes au Maroc pour faire face au chômage et à la précarité, August 2014.

• Kingdom of Morocco. La stratégie nationale pour l’emploi, synthesis report, 2015.


Tunisia


• Tunisian Institute of Strategic Studies (ITES). ITES Booklet No. 2 – Énergie 2025, October 2016.

• Tunisian Institute of Strategic Studies. Revue stratégique sur la sécurité alimentaire et nutritionnelle en Tunisie, December 2017.

• Tunisian Institute of Strategic Studies. Étude prospective - La Tunisie en 2025, complete economic report, December 2016.


• Republic of Tunisia, Ministry of the Environment and Sustainable Development. Intended Nationally Determined Contribution, August 2015.


• Republic of Tunisia; UNDP. Lignes directrices de la région de Médenine pour la localisation des ODD.

• Republic of Tunisia, Ministry of Foreign Affairs; Ministry of Development, Investment and International Cooperation; UNDP. Atelier national vers
Initial report on the achievement of the Sustainable Development Goals in the Maghreb

l’élaboration d’un rapport national sur le suivi des ODD, meeting record, May 2017.


