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First Report on the Achievement of Sustainable Development Goals in the Maghreb

Executive Summary

The process of national ownership and mainstreaming of SDGs in the planning and budgeting frameworks is making varying progress in different countries, but is overall still too slow.

Except for Mauritania, the other three countries have still to prioritize the SDGs and define the corresponding national targets and indicators. Notwithstanding the existence in all countries of national sustainable development strategies (NSDSs)², only Morocco is likely to make it the reference instrument in achieving the SDGs, alongside other European countries (Switzerland, Germany). The other three countries are using their growth strategies (SCAPP [accelerated growth and shared prosperity strategy]-2030 for Mauritania) or their medium-term national development plans (Algeria and Tunisia) to operationalize the SDGs. Some progress has been made in the effective mainstreaming of the SDGs into sectoral and local policies, with variations across countries and sectors.

In Algeria, the economic growth model (2016-2030) adopted in July 2016 makes no explicit reference to the 2030 Agenda and yet embraces several SDG-related issues. And so does the five-year program (2015-2019). The new National Strategy for Environment and Sustainable Development (NSESD 2018-2035), now being adopted, addresses 14 of the 17 Sustainable Development Goals. Work is underway to align SDGs with sectoral strategies, under the aegis of the SDG thematic groups and the Intersectoral SDG Coordination Committee. A review of the government's preparedness for the achievement of SDGs, headed by the Court of Auditors, is being carried out. The review aims to assess the measures taken to attain the SDGs and to formulate recommendations aimed at improving the coherence of public policies and governance mechanisms.

On the occasion of the 2016 HLPF, Morocco expressed its readiness to develop an integrated and convergent approach to the different sectoral strategies, as part of its efforts to achieve the SDGs. Indeed, the Sustainable Development Goals are enshrined and implemented through sectoral strategies where convergence is not always secured and is a challenge for the country. As a result, the National Strategy for Sustainable Development (NSSD 2016-2030) was approved in June 2017 and may, as outlined in the National Charter on Environment and Sustainable Development, serve as a reference and convergence framework for the various public policies aimed at sustainable development. It would appear, however, that no clear position has been reached on this issue yet. A review is currently underway to examine the coherence between the strategy and the SDGs, redirect its action plan and assess the funding needs needed for its implementation.

Mauritania has taken up the opportunity offered by the development of its new strategy for accelerated growth and shared prosperity (SCAPP, 2016-2030) to mainstream the SDGs and national targets identified as priorities. In addition, Mauritania has taken advantage of this opportunity to develop a new strategy for accelerated growth and shared prosperity (SCAPP, 2016-2030) to include MDGs and national targets identified as priorities³. An institutional framework for steering, coordinating and monitoring the SCAPP has been implemented. The monitoring of the SDGs and the development of voluntary national reviews to be submitted to the HLPF are an integral part of the SCAPP monitoring and evaluation and reporting system, whose monitoring matrix includes a range of 156 indicators, including the SDGs.

In Tunisia, the five-year development plan (2016-2020) already includes most SDGs. An analysis of the degree of integration of SDGs and targets into the five-year development plan and into certain sectoral strategies adopted by the government is being carried out in accordance with the RIA (Rapid Integrated Assessment) methodology. This exercise is part of the Five-Year Development Plan mid-term review process due to be launched in 2018 and the formulation of the new Five-Year Plan in 2019. Meanwhile, the government is considering the development of the new 2030 development strategy, which will integrate the SDGs. The government receives the United Nations system's joint program "Support for integration, monitoring, evaluation and reporting on the SDGs in Tunisia", concluded with the Ministry of Foreign Affairs and the Ministry of Development and International Cooperation in May 2018. Two other cross-cutting strategies remain to be formally adopted: the National Sustainable Development Strategy (NSDS, 2014-2020) and the National Green Economy Strategy (NGES, 2016-2030), which is a key component of the Five-Year Plan.

Institutional arrangements and responsibilities for the steering, coordination and monitoring of SDGs are now gradually being implemented.

Algeria and Mauritania created new coordination and consultation structures (Inter-ministerial Steering Committee chaired by the Prime Minister as well as sectoral and regional committees in Mauritania; Inter-ministerial Committee for the Coordination and Monitoring of the SDGs, chaired by the Minister for Foreign Affairs and the SDG-thematic groups in Algeria).

In Morocco, a governance framework was established for the management and monitoring of the NSSD comprising two committees: a strategic committee chaired by the head of government, with on the one hand a political and strategic guidance role, and on the other hand a steering committee led by the Secretary of State for Sustainable Development⁴, with a role for effectively monitoring the implementation of the strategy. The Ministry of Foreign Affairs and Cooperation takes on the role of political leadership for the SDGs, whilst the Ministry of General Affairs and Governance (MGAG) will continue to work on the convergence and harmonization of public policies. It is however still important to clearly spell out the structure that will be in charge of coordinating the implementation of SDGs.

In Tunisia, the Ministry of Foreign Affairs provides political leadership while the Ministry of Development, Investment and Cooperation (MDICI) provides technical (sectoral and regional) coordination and oversees the process of preparing the first voluntary national report to be submitted to the HLPF- 2019. Developing an institutional coordination mechanism is also one of the objectives of the joint United Nations system program « to support integration, establish a monitoring, evaluation and reporting mechanism of SDGs in Tunisia ».

Data availability is a considerable challenge for all countries, although to varying degrees. Assessment exercises 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% of the indicators in the global framework (HCP Study, 2016). In Mauritania, the report on the national benchmark situation of the SDGs selected under the SCAPP (MEF, March 2017) shows, in turn, that 54% of these indicators are not reported. In Tunisia, the preliminary results of the information deficit analysis, submitted in July 2018, show a level of indicator availability in the range of 55 percent. In Algeria, this level is believed to be 50%. A more marked deficit has been noted for environment, agriculture and governance-related data .

To address this challenge and meet the need for data to inform indicators, Mauritania has developed the national statistical development strategy (2016-2020), leveraging the previous strategy's assessment (2011-2015). A number of countries (Morocco, Tunisia, Algeria) already have a functioning system for monitoring environmental and sustainable development indicators related on the NSSD⁵, which could be used to build the new SDG monitoring system. To that effect, the role of national and regional environmental and sustainable development observatories in the monitoring of the SDGs requires consideration.

On the question of reporting, Morocco is the only Maghreb country to have submitted a first voluntary report to the High Level Policy Forum on Sustainable Development (HLPF) in 2016. Algeria, Mauritania and Tunisia have officially signed up to present their first report to the HLPF in 2019.

The question of sustainable development financing remains for all countries, which subscribe to the need to increase internal resources and private sector contribution, mainly through public-private partnership approaches (see AAAP and target 17.17) and business climate improvement to attract FDI in key sectors, likely to promote the attainment of the SDGs. To meet this challenge, countries will need to take the necessary measures to:

- Direct financial flows towards priority sectors targeted at achieving the SDGs and consider the interconnections between SDGs in budgetary allocations;
- Diversify the financing options through an appropriate mix of financing instruments;
- Establish an adequate framework to promote the contribution of private sector actors and banks;
- Build knowledge and capacity to make better use of the increasingly diversified and sophisticated sources and instruments of financing (e.g. funds, international initiatives, green bonds, etc.).

The thematic analysis revealed both the progress made and the challenges ahead :

The Maghreb is the only African sub-region to have achieved the MDG goal of combating hunger (FAO, Regional Overview on Food Insecurity, 2016). The prevalence of severe food insecurity (target 2.1 of SDGs 2), measured according to the Food Insecurity Measurement Scale (FIES), is reported to be about 12 percent in North Africa (excluding Mauritania, considered in the West Africa group) compared to 26 percent in Africa (State of Food and Nutrition Security in the World Report (FAO, 2017). Despite the growth gains in agricultural production, the national grain production supply is not meeting demand and remains highly vulnerable to climate change. The areas of irrigated agricultural land have increased significantly and the use of water-efficient irrigation techniques has improved. While agricultural investments have increased (particularly in Morocco and Mauritania), in all countries, sustainable improvement of agricultural production and productivity continues to depend on significantly increased investment in research aimed at improving soil and water conservation techniques and addressing the sector's vulnerability to climate change, a vulnerability which is particularly affecting women and the young. Innovation policies also lack coordination and private-sector involvement. None of the countries meets the minimum target recommended by the African Union of 1% of GDP spent on research and development.

Curbing unemployment and improving youth and women's employability are among the priorities of global and sometime sector-specific public policies and should be systematically implemented at the territorial level. These issues must be tackled in a comprehensive and better coordinated framework, and should involve a series of mutually reinforcing measures. These address the diversification of economic structures, closing the gap in territorial development and resulting in a massive exodus of young people towards urban centres, in the integration of the informal sector (the biggest employer of young people today), the narrowing the gap between skills and economic sectors needs and the widening of and better targeted support structures for entrepreneurship. Programs designed to improve the employability and occupational integration of young people and to promote entrepreneurship have been developed. All countries have set up dedicated structures such as the National Youth Employment Support Agency in Algeria (ANSEJ), 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 Independent Work (ANETI) in Tunisia. All these relatively expensive schemes have nevertheless a limited overall impact. They are insufficiently targeted and hence only a limited number of young people benefit from them.

Important aspects relating to precarious work, informal employment, social security protection and disparities in employment (between genders, regions, sectors of activity) are still not adequately addressed.

Access to electricity (target 7.1) is almost universal, except in Mauritania (38.8% in 2014). Countries have set the target of strengthening energy security through the introduction of new electricity generation capacity, the diversification of the energy mix which is more than 70% driven by fossil fuels (gas, oil, coal) and the harnessing of the significant renewable energy potential (wind, photovoltaic, CSP) and energy efficiency. The latter sectors also present opportunities for the development of new industrial sectors capable of creating added value and sustainable employment. As part of their national determined contribution (NDC), all countries have committed to reducing their CO₂ emissions by 2020. Notwithstanding the ambitious targets set by countries, the level of progress in energy transition varies from one country to another. Morocco and Mauritania have substantially boosted the share of renewable energy in their energy mix, but further efforts are needed to promote energy efficiency.

The Maghreb countries' economies are under-diversified, unsophisticated, with still a limited exportable supply and a relative dependence 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. However, the share of this sector in GDP has not shown any significant increase in recent years. Its contribution to employment also remained limited. While medium and high-tech products in industrialized countries make up about 80% of manufacturing output, in Maghreb countries their share is scarcely 10%.

Industrial integration, i.e. the development of local content, has become a truly strategic challenge requiring the development of innovative programs to substitute a large proportion of industrial imports and stimulate exports. Today, the contribution of industry to the national R&D and innovation effort remains marginal. Climate risk adaptation, greenhouse gas (GHG) emission reduction and energy efficiency are not explicitly reflected in the industrial policies.

Combating desertification, managing water resources and preserving forest cover are still major challenges for the countries. Desertification and land degradation are threatening some 80 to 90% of the national territory, depending on the country. While some major projects and programs have been carried out as part of the National Action Plans to Combat Desertification (NAP-CD) and sectoral strategies, the achievements (stabilization of sand and continental dunes, reforestation) are still inadequate, given the extent of challenges compounded by climate change.

Adaptation to climate change is one of the priorities of the countries, since all of them have initiated the process of developing the National Adaptation Plan (under the Cancun Adaptation Framework). Adaptation is an integral part of countries' national determined contributions under the Paris Climate Agreement. As part of the implementation of the Sendai Framework for Disaster Risk Reduction (2015-2030), countries have made institutional and legislative progress and introduced specific financial mechanisms. Yet, weaknesses still remain in knowledge and detailed assessment of major risks and their incorporation into national planning, investment and development decisions. The adoption of a multi risk, better structured and more inclusive management policy and strengthened coordination of stakeholders (ministerial departments, public or semi-public bodies) feature among the challenges to be addressed.

Regional cooperation is set to play a central role in the implementation of 2030 Agenda, empowering countries to meet their common challenges through the adoption of more appropriate, cost-effective and replicable solutions. The main agreements concluded in 2015 (2030 Agenda, Agenda 2063, the Paris Climate Agreement, the Addis Ababa Action Plan on Financing for Development) prioritize the support of projects and cooperation frameworks promoting regional integration and fostering cooperation and exchange of experience, particularly in Africa.

With a market of 90+ million consumers, the Maghreb remains one of the least integrated regions both within the region and in terms of integration into the global economy. Intra-Maghreb trade represents roughly 3% of the total foreign trade of the five countries (3.35% - ECA, 2012) and inter-Maghreb foreign direct investment projects, originating mainly from Morocco and Tunisia, remain limited.

While regional priorities are reasonably clearly defined, few strategic frameworks are currently available to steer action by Maghreb countries and there are no target figures at the Maghreb level either. And while the countries share the same strategic challenges, national policies are seldom designed with the objective of promoting cooperation between Maghreb countries. The Arab Maghreb Union (AMU) and member countries must step up their efforts to translate the numerous commitments made within the AMU into concrete actions and must work together to solve problems of common interest, in particular harmonizing policies and regulations, stimulating intra-regional agri-food trade, creating regional value chains, fostering the development of cross-border energy infrastructure and promoting the exchange of knowledge, experience and technology transfer.

The AMU has therefore an important role to play in accompanying its member countries in implementing and monitoring the 2030 Agenda and Agenda 2063. To this end, it should step up its leadership role in regional coordination so as to facilitate the synergy of development partners' interventions at the sub-regional level and improve their impact, through better mutual access to and resource-sharing. It will have to direct its efforts towards five areas of focus:

- the development of a Maghreb-wide sustainable development strategy in support of the efforts made by its member countries in attaining SDGs and implementing Agenda 2063;
- the regular follow-up review of the situation, progress and outlook for sustainable development across the Maghreb;
- the capacity-building of the institution's staff;
- the sharing of knowledge, experience outcomes and good practices among its Member States in key sectors such as statistics, research and technological innovation, skills training, etc.;
- the implementation of subregional initiatives to support continental initiatives and programs sponsored by the African Union.