NORTH AFRICA
PROFILE

MARCH 2016

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NORTH AFRICA AT A GLANCE

General information							
Regions	Africa, Mena, Arab League						
Official Language	Arabic						
REC memberships	COMESA, CEN-SAD, UMA, IGAD						
Countries	**Algeria**	**Egypt**	**Libya**	**Morocco**	**Mauritania**	**Sudan**	**Tunisia**
Capital city	Alger	Cairo	Tripoli	Rabat	Nouakchott	Khartoum	Tunis
Currency	Algerian Dinar	Egyptian Lira	Libyan Dinar	Moroccan Dirham	Ouguiya	Sudanese Pound	Tunisian Dinar
Rankings							
HDI (2014)	83	108	94	126	156	167	96
Gender Inequality Index (2014)	117	131	27	117	139	135	48
Ibrahim Index of African Governance (2014)	20	24	47	16	41	51	8
Ease of Doing Business (2016)	163	131	188	75	168	159	74
Corruption Perceptions (2014)	100	94	166	80	124	173	79
Key demographic indicators	**NORTH AFRICA**						
Population (millions)	227.9 (2015)						
Children (0-14 years)	73,6 (2015)						
Adult (15-64 years)	142,5 (2015)						
Aged (65+ years)	11,8 (2015)						
Annual average Growth rate	1,8 (2015)						
Urban (%)	51,6 (2015)						
Crude birth rate (0/00)	25,9 (2015)						
Crude death rate (0/00)	6,1 (2015)						
Total fertility rate	3.2 (2015)						
Life expectancy at birth	71.1 (2015)						
Education and employment	**Algeria**	**Egypt**	**Libya**	**Morocco**	**Mauritania**	**Sudan**	**Tunisia**
Literacy rate (15-24) (%)	94.4 (2014)	93.3 (2015)		81.5 (2011)	58.6 (2012)	87.3 (2013)	79.1 (2012)
Net enrolment rate in secondary (%)		85.4 (2013)		55.9 (2012)	21.52 (2013)	67.0 (2013)	
Female		85.2 (2013)		58.8 (2012)	19.95 (2013)	52.0 (2013)	
Male		85.6 (2013)		53.0 (2012)	23.05 (2013)	73.0 (2013)	
Employment to population ratio (total) (%)	41.5 (2014)	42.8 (2014)		46.0 (2014)	40.0 (2012)	45.0 (2014)	47.2 (2013)
Unemployment rate) (%)	10.4 (2014)	12.8 (2015)		8.7 (2015)	10.1 (2014)	19.5 (2014)	15.2 (2014)
Youth unemployment rate	25.2 (2014)	38.9 (2014)		20.6 (2014)	14.2 (2014)	33.0 (2015)	31.2 (2014)
Population below) (%) International poverty line ($2/day (%)	0.4 (2011)	15.4 (2008)		0.3 (2011)	25.9 (2012)*	46.5 (2008)	1,06 (2010)*
Health	**Algeria**	**Egypt**	**Libya**	**Morocco**	**Mauritania**	**Sudan**	**Tunisia**
Percentage of children under-5 underweight	3.0 (2012)	6.8 (2008)		3.1 (2011)	15.0 (2010)	31.7 (2014)	2.3 (2012)
Prevalence of Undernourishment (%)	5.0 (2013)	5.0 (2014)		5.0 (2013)	7.0 (2013)	39.4 (2013)	5.0 (2013)
Under 5 mortality rate (per 1,000)	15.5 (2014)	21.8 (2013)		30.4 (2013)	122.0 (2010)	78.0 (2013)	17 (2013)
Infant mortality rate per 1,000	17.0 (2014)	20.3 (2015)		26.1 (2013)	77.0 (2010)	51.2 (2013)	15 (2013)
Neo-natal mortality rate per 1,000 live births	12.0 (2014)	12.8 (2015)		18.0 (2013)	39.0 (2010)	29.9 (2013)	8.0 (2015)
Maternal mortality ratio per 100,000 live births	73.9 (2013)	45.0 (2013)		120.0 (2013)	630.0 (2012)	216 (2013)	44.8 (2009)
Public expenditure on health (% of budget)	5.0 (2015)	5.4 (2014)		33.5 (2014)		11.1 (2012)	5.4 (2014)

Economic performance and Inflation	NORTH AFRICA
GDP, billon Current USD	825,9 (2014)
Real GDP Growth rate (%)	2,6 (2014)
Inflation Annual change (%)	9,3 (2014)
Money and finance	
International reserves, million USD	14,927 (2014)
Total external debt, million USD	176454 (2014)
Government finance	
Total Revenues and Grants (% of GDP)	26,4 (2014)
Total Expenditures and Net Lending (% of GDP)	37,1 (2014)
Overall deficit (-) / Surplus (+) (%of GDP)	(-10,7) (2014)
External sector	
Exports - Total, billion USD	157,942 (2014)
Imports - Total, billion USD	231,489 (2014)
Net ODA, million USD (2013)	9977,3 (2013)
Net FDI Inflows - million USD	11057,69 (2014)

Use of information and communication technologies	Algeria	Egypt	Libya	Morocco	Mauritania	Sudan	Tunisia
Mobile cellular penetration rate (%)	93,3 (2014)	114,3 (2014)	161,1 (2014)	131,7 (2014)	94,2 (2014)	72,2 (2014)	128,5 (2014)
Individuals using the Internet (%)	18,1 (2014)	31,7 (2014)	17,8 (2014)	56,8 (2014)	10,7 (2014)	24,6 (2014)	46,2 (2014)
Environment							
Forest area (% of land area)	0,6 (2012)	0,1 (2010)	0,1 (2012)	11,5 (2012)	0,2 (2012)	23.2 (2012)	6,7 (2012)
CO2 emission (1,000 metric tons)	121755,4(2011)	220790 (2011)	39020,5 (2011)	56537,8 (2010)	2310,2 (2011)	16578,5 (2011)	25643,3 (2011)
Per capita metric tons	3,3 (2011)	2.6 (2011)	6,2 (2011)	1.7 (2011)	0,6 (2011)	0.4 (2011)	2,4 (2011)
Energy consumption per capita (kg oil equivalent)		913 (2012)		464 (2010)		342.1 (2012)	

Sources : 1. National official data, 2. ASYB 2015, 3. FAO, 4. UNPD, 5. WHO, 6. UN Data, 7. IMF, 8. World Bank, 9. OECD, 10. UNCTAD, 11. MO Ibrahim Foundation, 12. Transparency International, 13. UNESCO, 14. ILO, 15. ITU, 16. UND

1. INTRODUCTION

North African countries have been disrupted by political shocks (2011 in Tunisia, Egypt and Libya, 2008 in Mauritania, and 2011 in Sudan) that have significantly affected their economies and revealed their vulnerability. This vulnerability to exogenous shocks is mainly due to: (i) insufficient diversification of their economies, (ii) a high dependence of public finance on volatile resources (primary sector or natural resources), (iii) too low fiscal capacity, (iv)an inappropriately developed private sector, and (v) an inefficient public governance.

Following the 2011 political shocks, growth in the region fell from 3.9% in 2010 to 2.2% in 2011. It remained on average at 2.5% over the 2011 – 2014-period. The shock absorption is not yet complete, despite a return to some political stability in Tunisia and Egypt. Sudan continues to suffer the repercussions of the South split and must make significant budget adjustments to cope with a public debt of which burden in GDP has mechanically increased following the split. The Tunisian economy grew by hardly 0.8% in 2015, especially because of security problems that weigh heavily on investment. Algeria and Morocco remain the only stable countries in the region, but their economies are dependent on primary sectors or volatile natural resources. In 2014 and 2015, the cut in crude prices significantly impacted public finance in Algeria, the state budget depending at almost 60% on oil revenues. The growth being driven by public investment, the slowdown of one of the major economies of the region is to be expected. North Africa being poorly integrated from the commercial point of view, the slowdown of the Algerian economy will have limited impact on other economies. In Morocco, although economic reforms have been undertaken to reduce GDP volatility, the country still depends heavily on the agricultural sector. After a disappointing year for the sector, and GDP growth amounting to only 2.4% in 2014, a year considered exceptional in 2015- thanks to good rainfall- has bounced growth to 4, 4%.

In total, the region should reach 3.8% growth in 2015, as a result of various factors, including: i) the return to a certain political stability in Egypt, where growth in 2015 totaled 4.2 %, ii), resistance of the Algerian economy (3.8%), and iii) a good GDP growth in Morocco, which has reached 4.4%.

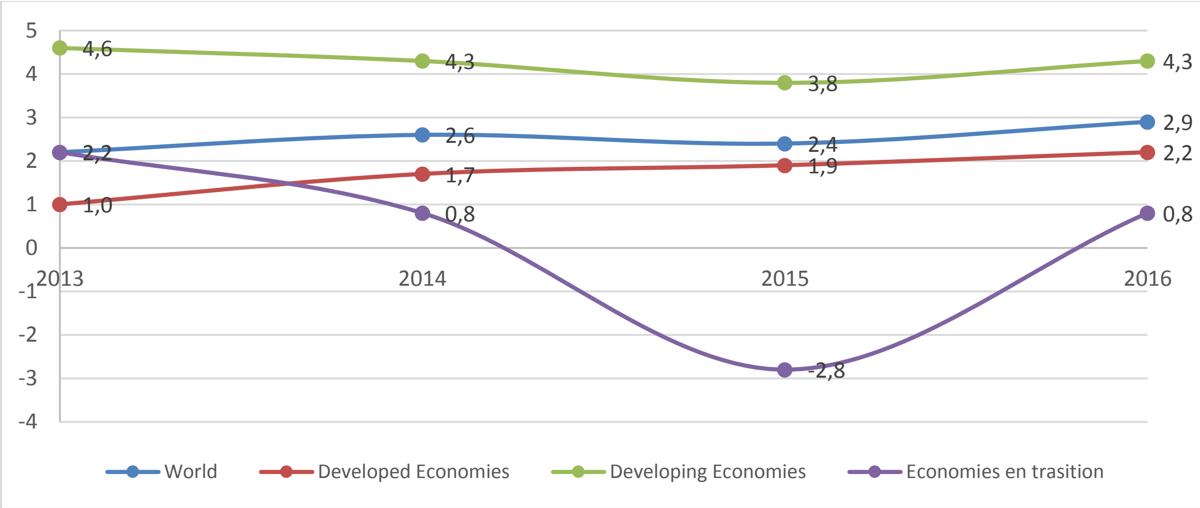
This regional profile is composed of a first part dedicated to the main economic aggregates and regional integration, a second part on social development and inequality, and a third part devoted to the profile's thematic section on gender equality in North Africa.

2. INTERNATIONAL CONTEXT

2.1 INTERNATIONAL AND REGIONAL ENVIRONMENT: IMPLICATIONS FOR THE SUB-REGION

The global GDP growth declined slightly from 2.6% in 2014 to 2.4% in 2015 (Chart 1). This decline, however, was mitigated by the good performance of gross fixed capital formation and household final consumption expenditures (Chart 2). Growth in developed countries was 1.7% in 2014 to 1.9% in 2015, supported by growth in the US, which has remained almost at the level of 2014 (2.4%) and that of the Euro Zone, which rose from 1.4% in 2014 to 1.9% in 2015. Growth in these two areas is expected to reach 2.6% and 2.0% in 2016, respectively. On the other hand, growth in emerging and developing countries has dropped from 4.3% in 2014 to 3.8% in 2015, mainly because of a slowdown in BRICS (3.9% in 2015, against 5.1 % in 2014). In 2016, global growth is expected to experience a slight recovery, reaching 2.9%, primarily thanks to improved business competitiveness and a slight recovery in investment.

Graph 1: Performance of global growth, 2013-2016



Source: UNDESA, 2015

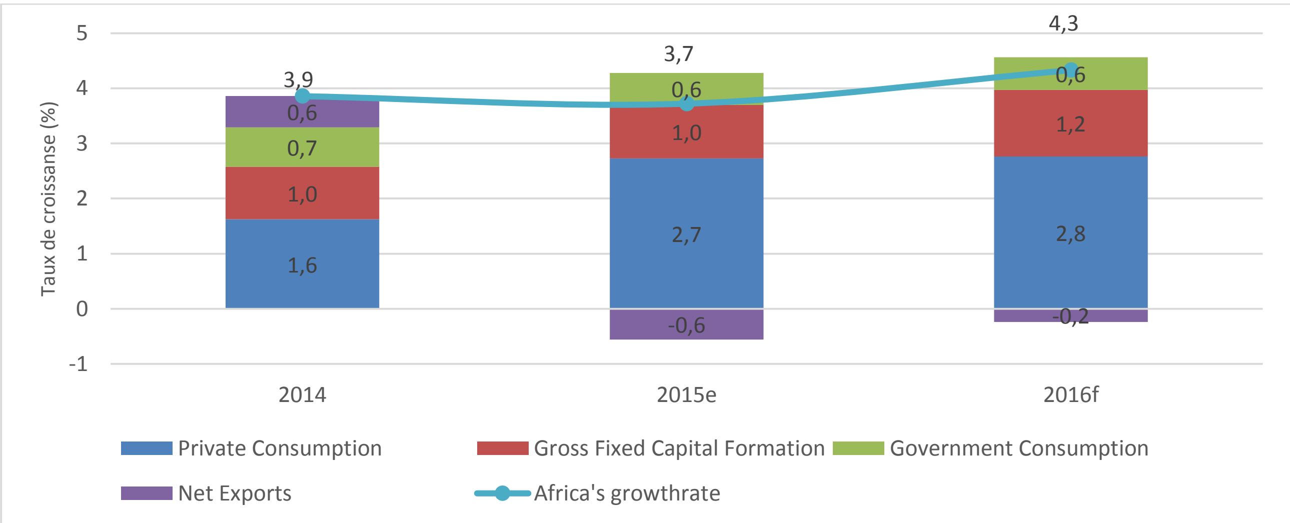
2.2 GROWTH IN AFRICA: THE DECLINE IN THE PRICES OF RAW MATERIALS WEIGHED ON GROWTH

Despite the decline in the prices of raw materials, growth in Africa continues to be resilient, showing 3.7% in 2015, against 3.9% in 2014. This slight decrease is mainly due to the slowing global economy and to raw materials lower prices. However, several major economies of the continent have experienced high growth rates in 2015, for example, Kenya (6.4%), and Ethiopia (7.3%). On the other hand, South Africa achieved less than 1.8% growth.

The growth of the African continent was driven by private consumption, with a middle class that reached 370 million people (African Development Bank, October 2014).

It was also supported by investment, thanks to business environment improvement and the reduction of factor costs and other production costs (Figure 1). Growth also benefited more from public spending in infrastructure projects (DATA). According to forecasts, 2016 should be characterized by a slight rise in the prices of raw materials, driven by rising global demand. The growth of the continent should thus reach 4.3%.

Chart 2: Growth performance of Africa and its 2014-2016 components



Source : ECA, 2016, data : EIU 2015 et UN-DESA 2015

At continental level, sub-regions experienced different situations: Growth in East Africa and West Africa was above the continental average (3.7% in 2015). East Africa showed the best economic performance, with 6.2% growth in 2015, followed by West Africa with 4.4%. These two sub-regions continue to benefit from very strong regional attractiveness, thanks to recent efforts to accelerate the strengthening of the institutional framework for regional integration (allowing better attractiveness of foreign direct investment), and to pursue public spending on infrastructure projects. Growth was raised to 3.4% in Central Africa and 2.5% in Southern Africa. These values are going down compared with 2014, due to security problems in Central African Republic, on the one hand, and to the decline of oil production in Equatorial Guinea, on the other.

2.3 REGIONAL INTEGRATION PROCESS: INTEGRATION UNDER CONSTRUCTION

The African regional integration index aims to determine to what extent each African country respects its commitments within the framework of Pan-African integration mechanisms based on the Abuja Treaty.

This is a project developed jointly by the African Development Bank, the African Union Commission and the Economic Commission for Africa. This index covers the following aspects: free movement of people, trade integration, productive integration, regional interconnections and infrastructure[1].

Table 1 shows the ranking of North African countries for which data are available. One notes very heterogeneous performances between countries in terms of regional integration. Examining index components allows better understanding of the differences.

Table 1 : Summary of North Africa's performance versus certain aspects of regional integration African Index

	Free movement of people	Trade integration	Productive integration	Infrastructure
Tunisia	26	6	9	48
Egypt	53	7	14	24
Mauritania	25	46	23	28
Sudan	51	18	38	17
Morocco	31	12	8	37
Algeria	2	21	43	32

Note : The green color represents the 18 highest ranked African countries for this aspect; yellow color, African countries ranked 19th to 36th; and red color, the 18 last ranked African countries.

- ***Free movement of people***

Free movement of people in African countries is scored according to two indicators: the proportion of REC-level protocols on free movement of persons ratified (out of those RECs of which the country is a member) and the number of other African countries whose nationals are allowed to enter visa-free or with a visa on arrival.

For this aspect, the six countries of North Africa (Algeria, Egypt, Morocco, Mauritania, Tunisia, Sudan) have heterogeneous characteristics.

Regarding the first indicator, of the six countries, four have ratified the treaty of CEN-SAD, and three that of the UMA . Morocco and Tunisia are the only countries to have ratified the two protocols on free movement of persons. Mauritania, Sudan and Algeria only ratified one of the two agreements; the CEN-SAD agreement was ratified by Mauritania and Sudan, and UMA agreement was ratified by Algeria. Egypt is the only country not to have ratified any protocol on free movement of persons.

As regards the second indicator, the six countries have different restrictions. Algeria has the most restrictive regulations, allowing only nationals of seven African countries to enter without a visa or with a visa on arrival. Tunisia, Morocco and Egypt have similar restrictions, allowing nationals of respectively 25 and 20 countries to enter without a visa or with a visa on arrival. Mauritania is the only country that allows nationals of all African countries visa-free entry or a visa on arrival. There are no data available on Sudan.

- ***Trade integration***

The Index includes several indicators, regarding in particular, average custom duties on intra-REC imports, the level of ease of cross-border trade (of Doing Business Index of the World Bank), and intra RECs goods imports and exports. Service trade is not included due to insufficient data on such trade within Africa.

Regarding the first indicator (average customs duties on intra-REC imports), Morocco, Tunisia, Egypt and Sudan have a good performance, with rates almost to zero. Only Algeria and Mauritania established rates of 4% and 7-9% respectively.

Morocco and Egypt also perform well in terms of ease of cross-border movements of goods.

At the level of intra-REC trade, we note that intra-country differences in North Africa are quite large with imports representing between 0.1% and 4% of GDP and exports ranging from 0.1% to 3% of GDP. Tunisia takes the first position in terms of intra-RECs in the UMA imports (4%) and exports (3%), followed by Mauritania with an import rate of 3%. In Egypt and Sudan, trade with RECs is very low, with import and export rates between 0.02% and only 1% of GDP. Compared to intra-REC import rate of 15% in the case of Mali, 11% for Côte d'Ivoire, and intra-REC export rate of 11% for Togo, we note that North Africa as a whole is poorly integrated commercially.

- ***Productive integration***

This index is made up of UNCTAD Merchandise trade complementarity index , on the one hand, and the productive integration of intra-regional trade of intermediate goods, on the other.

Based on these indicators, Tunisia has the best performance of North Africa countries. It is the highest ranked UMA member country according to UNCTAD Merchandise trade complementarity index (which indicates that its production is relatively specialized to integrate with RECs). Morocco's trade also coincides quite strongly with that of the members of the UMA , indicating that its production is specialized enough to be integrated into regional value chains. Algeria is ranked third in the UMA according to this indicator, its economy is considered sufficiently specialized to integrate with RECs. Sudan has rather a poor performance in this aspect, ranked 25th of all African countries. Lastly, Mauritania is the lowest ranked country in North Africa according to this indicator.

Regarding intra-regional trade in intermediate goods, Mauritania is again the country with the lowest level of intra-regional flows of intermediate goods. The other North Africa's countries have acceptable or good performance. Tunisia is first and third respectively in exports to the UMA and CEN-SAD, whereas for exports, it is at level 4 in the UMA and 11 in CEN-SAD. Morocco is ranked second in the UMA behind Tunisia at the level of intra-regional flows of intermediate goods. Algeria has the highest imports rate in the UMA and is generally third in the same REC behind Morocco. Egypt also occupies a prominent place in the CEN-SAD, being the country that exports most in this REC.

On the whole, six countries perform well in productive integration in comparison with the other dimensions of regional integration. However, Sudan and Mauritania especially should still undertake substantial improvement efforts.

- ***Infrastructure***

An indicator of this index is the rapid Internet speed (megabytes), which is important for international communication, particularly to support service trade. All six countries of North Africa are showing a good performance on this indicator. Morocco, with a web speed of up to 13 megabytes per second per person, is the second African country in terms of Internet speed, behind Kenya (21 megabytes).

Mauritania is ranked third, Tunisia fifth, Algeria sixth, Egypt ninth and Sudan - showing the lowest performance in Internet speed in North Africa - is the 11th country in Africa in terms of megabytes.

This index also takes into account the power generation capacity, the index of the African Development Bank on the quality of infrastructure and infrastructural integration for the countries for which data are available. Consideration of these other indicators provides a more nuanced picture. Sudan is positioned in the second third and Morocco among the lowest countries in terms of infrastructural integration. The index of the African Development Bank on the quality of infrastructures ranks Algeria eighth and Mauritania 35th. Regarding power generation capacity, Egypt and Morocco have good performance. Egypt is the fifth African country in terms of net power generation capacity per person and Morocco the ninth.

3. ECONOMIC PERFORMANCE

3.1 ECONOMIC GROWTH:

Very vulnerable economies to external shocks

The economies of the region are characterized by volatility of their growth, as they are dependent on sectors that are vulnerable to exogenous shocks (primary sector and natural resources), and on growth that does not sufficiently generate sustainable employment. Recent political events have highlighted the structural weaknesses of regional economies.

In 2011, North Africa underwent a political asymmetric shock. Three countries, Egypt, Tunisia and Libya, were plagued by major social movements, resulting in political instability that had a significant economic impact. Regional growth slowed down from 4.3% in 2010 to 2.4% in 2011 (Table 2).

Table 2 : Growth rate (%)

	2010	2011	2012	2013	2014	2015 (p)
Algeria	3.6	2.9	3.4	2.8	3.8	3.8
Egypt	5.2	1.8	2.2	2.1	2.2	4.2
Mauritania	4.3	4.0	7.0	5.7	6.4	3.1
Morocco	3.8	5.2	3.0	4.7	2.4	4.4
Tunisia	3.0	-1.9	3.7	2.4	2.3	0.8
Sudan	5.2	1.9	1.4	4.4	3.6	3.5
North Africa (excluding Libya)	4.3	2.4	2.7	3.0	2.9	3,8
Africa	5.2	0.9	5.3	3.4	3.1	3.7

Sources: Data compiled *from national administrations, UNDESA Africa Growth October 2015, North Africa growth ECA* calculation

In Sudan, South Sudan split in 2011 was a major shock to the economy, causing a sudden drop in revenues derived from hydrocarbons (-75%) and a reduction of budget revenues (-50%).

Only three countries, Algeria, Morocco and Mauritania have been spared from the 2011 political and social events. Mauritania's economy has benefited from the return to a more political stability since 2009, and thus has had an average growth rate of more than 5.5% over the 2010-2014-period.

The Algerian economy, driven by the hydrocarbons sector, showed an average growth of 3.3% between 2010 and 2014, which is relatively low compared to its potential. The hydrocarbon off GDP however, has shown an average growth of 5.5% over the same period.

Finally, the growth of the Moroccan economy has increased in average to 3.8% over the 2010-2015-period.

These growth trends reflect different sectoral dynamics depending on countries, particularly in terms of economic diversification. Although some countries have managed to diversify their economy, they are still dependent of primary sectors and/or a limited number of natural resources (agriculture, oil and gas, mainly minerals) and tourism.

Morocco and Tunisia have made significant efforts to diversify their economies.

In order to reduce growth volatility, Morocco has namely developed its industry and reduced dependence of agricultural production on rainfall (Green Morocco Plan). From 2005, the evolution of the industry is characterized by a structural change with a slowdown in conventional sectors such as textiles and clothing, for the emergence of new professions in car industry and aeronautics. Thus, industry contributes with up to 15.5% to GDP in current prices in 2014. Yet, the growth of the economy remains sensitive to climatic conditions.

Tunisia has also been able to reduce the weight of the primary sector in GDP, which rose from 11.4% of GDP in 2006 to 9.4% in 2014, to the benefit of industry and services, which represent 16% and 43% of GDP respectively. The share of mechanical and electrical industries has multiplied by 2 between 2010 and 2014, passing from 3% to 6% of GDP, alongside a decline by half of the share of textile and clothing (6% of GDP in 2000 to 3% in 2014).

In Egypt, the primary sector and mining industries (mainly oil) have shown a relatively stable share in the economy since early 2000. The two sectors represented on average 30% of GDP over the 2000 – 2014-period. The weight of manufacturing industry also remained stable at 16% over the same period.

On the other hand, Algeria, Mauritania and Sudan have not yet managed to sufficiently diversify their economies and remain dependent on a limited number of low value-added sectors. Their economies remain very sensitive to shocks to commodity prices.

The Algerian economy is heavily dependent on the hydrocarbon sector which accounts for almost 30% of GDP and 60% of budgetary revenues. The industry is a weak spot in the economy, representing on average 5% of GDP over the 2000 – 2013-period. In 2014, the significant decline in oil prices reduced the share of hydrocarbons in GDP to 27 %, and with the continued decline in crude, this share is expected to fall below 20%.

In Sudan, the weight of the primary sector remained stable at 30% of GDP over the 2000 – 2014-period. In 2000, the primary sector and oil weighed nearly 40% of GDP.

Finally, in Mauritania, the primary sector and extractive industry accounted for nearly 36% of GDP in 2005 and almost 39% in 2014.

This difference in structure of economies, combined with political and social shocks, partly explains contrasted economic performance in 2015.

The Moroccan economy achieved a growth estimate of 4.4% (against 2.4% in 2014) thanks to an exceptional crop year. In 2015, agricultural value added achieved a remarkable increase, with growth estimated at 12% in the first quarter (against 1.6% in the 2014-first quarter). The non-agricultural GDP decelerated slightly from 3.4% to 3.1%. In the 2015-third quarter, the sectors outside agriculture achieved a 1.8% growth in their value added, after a 1.6% increase in the second quarter. In 2014, the primary sector contributed with up to -0.7 point to growth, industry 1.8 and services 1.5 (Table 3).

In Egypt, the relative stabilization of the political situation following the June 2014 presidential elections, added to some structural reforms have helped revitalize the economy, which has come back to the ante-crisis growth rates. GDP growth reached 4.7% in the first three quarters of the 2014-2015 fiscal year, and is estimated at 4.2% for the fiscal year. The growth was driven by the manufacturing sector excluding hydrocarbons (2.7%), tourism (1.2%), the construction sector (0.4%), wholesale and retail trade (0, 4%), and agriculture (0.5%), while the other services contributed negatively.

In Sudan, in 2014, GDP growth (3.6%) was driven by growth of the agricultural sector (3.9%) and mining (5.3%), collection of customs duties on oil transit and transitional financial arrangement (TFA) concluded with South Sudan. In 2015, growth is estimated at 3.5% (according to CBS), driven mainly by agriculture (contribution 1,2pt) and industry (contribution 0,9pt).

Mauritania's economy continued its momentum in 2014[2], with growth standing at 6.2% and remaining above 5% since 2012. Growth was driven by the primary sector (contribution of 1 pt), thanks to fishing, mining (0.23 pt) and construction (1.5pt). In total, the industrial sector contributed with 3 points to growth (Table 3). However, growth has slowed down to 3.1% in 2015, due to a decrease in iron prices.

The Tunisian economy continues to suffer the burden of security problems, and displayed an estimated growth of less than 1% in 2015. Industry and services are dropping: the general index of industrial production registered a decline of - 1.7% in the first 9 months of 2015, mainly as a result of the decline in mining production (-27.7%). The decline in the services sector is mainly due to the decline of tourist activity, with all indicators in red (-52.2% for overnight stays, -23.1% for foreign tourist arrivals and 56% for tourist revenues). In 2014, growth was driven by services (contribution of 2.3 points, Table 3), while industry contributed negatively to GDP growth (-0.3 point)

In 2015, the Algerian economy was hit hard by the falling oil prices. The price of oil fell from 109.92 dollars on average during the first 9 months of 2014, to 55.76 dollars during the same period in 2015. The decline in prices was accompanied by a 3.09% decrease in exported quantities over the same period. Thus, hydrocarbon exports amounted to 25.79 billion dollars against 46.86 billion in 2014. Although the government predicts 3.8% growth in 2016 (2016 Finance Act), deceleration of the Chinese economy, the US oil shale exports, and the agreement on the Iranian nuclear should weigh heavily on the rise in oil prices; This should not allow the Algerian economy to maintain the same growth pace as in 2014.

Table 3: contributions to growth in 2014

	Mauritania	***Algeria***	***Sudan***	***Egypt***	***Tunisia***	***Morocco***
	6,2	3,8	3,6	2,2	2,3	2,6
	Contribution to growth					
Primary sector	1		-1,3	0,5	0,2	-0,7
Secondary sector	3		3,3	0,7	-0,3	1,8
Tertiary sector	2,2		1,6	0,95	2,3	1,5

Source: National data.

3.2 MONETARY POLICY

The majority of countries in the region have conducted prudent monetary policies to control rising prices. Algeria, Morocco and Mauritania have managed to maintain inflation below 4% (Chart 3). In Algeria, the balance of payments deficit and the budget deficit have led to a very small increase in the M2 money supply (according to BA), of 0.8% during the first nine months of 2015, against 12% in the same period in 2014.

In Morocco, the growth speed of the money supply as measured by M3, fell from 6.2% on average in the second quarter to 5.3% in late July and is expected to reach 5% in 2015. This moderate growth speed has no inflationary effect.

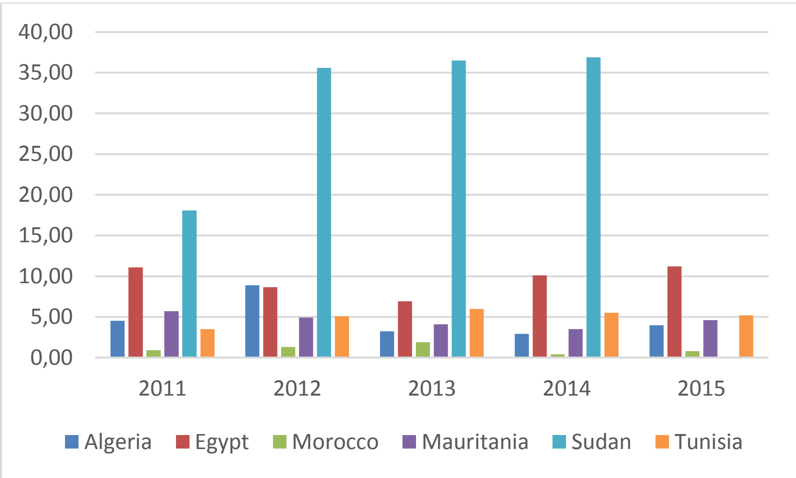
In Mauritania, the Central Bank has limited the increase in the money supply, by limiting the banks' liquidity increase. Thus, in October 2015, the rate of monthly inflation stood at -0.4%, lower than in the first 10 months of 2014 (+ 0.4%).

In Tunisia and Egypt, the necessary support to the economy has made it more difficult to control inflation. In Egypt, prospects of lower inflation, particularly due to a reduction in energy costs, and improved prospects for growth have pushed the Central Bank to keep its leading rates till the end of July 2015. However, inflation achieved an 11% increase for the year 2014/2015, after rising by 10.1% in the previous year.

In Tunisia, the Central Bank maintained a loose monetary policy to provide liquidity to banks at the inflation cost of 5.7% in 2014, and inflation is expected to continue at the same level in 2015.

Finally, in Sudan, the Central Bank adopted a loose monetary policy for the monetization of the budget deficit, and to replenish foreign exchange reserves through the purchase of gold. This has fostered the growth of the money supply. To reduce inflation, the Bank of Sudan should continue to tighten the loan allocated to the state, particularly by streamlining gold purchases, while thinning the interbank market for effective liquidity management. Budget consolidation also helps reduce the rate of money creation. Thus, inflation of consumer prices, although still very high, has stabilized in 2014, reaching 37%, against 36.4% in 2013. Inflation has started to decline and is expected to reach 21.8% in 2015.

Chart 3: Annual inflation rates, North Africa, 2011-2015



Sources: National Data (questionnaire of BSR-AN, official web-sites), IMF and EIU, September 2015

3.3 PUBLIC FINANCE

Most North African countries have made efforts to control budget deficit increase (Chart 4), in a context where support for development required a strong increase in public expenditures.

The control of public finance was conducted by combining an increase in revenues and rationalization of expenditures. The rationalization of public spending is indeed increasingly regarded as a necessity to allow for greater efficiency in public spending. In some countries, such as Egypt or Sudan, the authorities carried out a reform of subsidies, considered very expensive for public finance, and having little impact on poverty reduction.

In Egypt, the government has tightened fiscal policy to limit debt, with a target of 10% deficit in 2015. The deficit reached 13.8% of GDP in 2012/2013 due to higher public spending to stimulate growth. Limiting the increase in fiscal deficit despite higher spending (including a wage increase of 17% between 2013/2014 and 2014/2015) was achieved thanks to an expansion of state revenues. Budgetary revenues increased by 3.6% during the July 2014 - May 2015-period. This increase is due to the tax reform carried out at the beginning of the 2014/2015 fiscal year.

In Sudan, South split significantly increased the debt burden on public finance, thus encumbering the capacity of the state to support growth.

The initiation of the emergency plan between 2012 and 2014 to cope with the budget deficit helped consolidate public finance and bring the deficit down from -3.5% of GDP in 2012, to -0.9 % in 2014. The government has also increased its fiscal capacity in 2013, in order to reach a weight of public levies of nearly 10% of the GDP. Fiscal consolidation is expected to continue in 2015 with new measures to increase the tax base (including a reduction in tax exemptions, a reform of the tax system in the gold sector, improvement of the capacity of the tax administration).

In Morocco, the deterioration in public finance since 2009 has led the government to implement measures likely to consolidate public finance. A budget adjustment was started in 2013, cutting the budget deficit (excluding privatization) with 2.1 and 0.2 points of GDP in 2013 and 2014 respectively. The ordinary balance turned positive in 2014, making a complete change of the situation. The budget deficit narrowed in the first seven months of 2015 compared to 2014, due to a cut of current expenditures (-6.5%), which is more significant than that of ordinary revenues (-4.6%). Ordinary income reached 120.6 billion Dirhams at the end of July 2015. The decrease of current income was primarily due to a decrease of non-tax revenues, while the decline in tax revenues (which reached 105 billion dirhams) amounted to -0.3%.

In Mauritania, the government was concerned with ensuring macroeconomic stability by controlling the increase in public deficits. Thus, 2012 and 2013 were marked by the positive overall budget balance (2.3% of GDP in 2012 and 4.6% in 2013), mainly resulting from an increase in budget revenues, which grew at an average rate of 14 5% between 2010 and 2014. In 2014, the budget deficit rose to 3.6% of GDP as a result of a decrease in lower mining revenues (due to lower world prices) and a non - payment of financial compensation under the fisheries agreement with the EU. In the first 3 quarters 2015, the deficit reached -26 billion Ouguiya (against -55.1 billion in 2014)

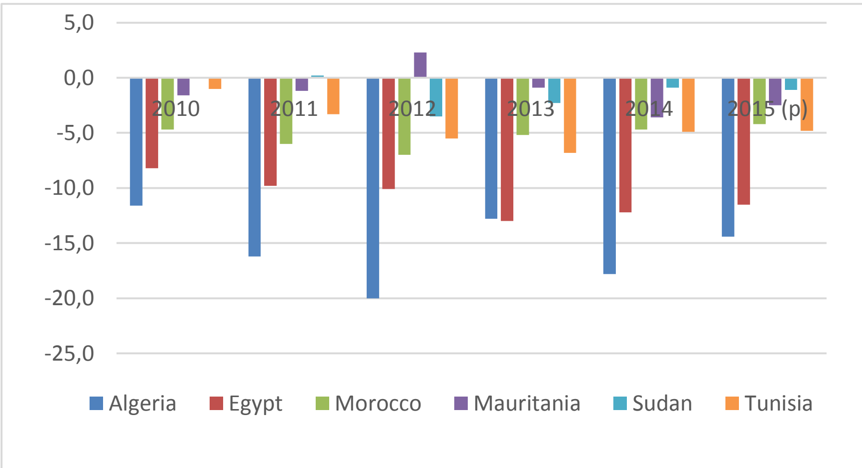
Faced with public deficits, which reached a peak of 6.8% of GDP in 2013, the government made a number of provisions in the Complementary Finance Act in August 2014, in order to curb the rise of budget deficit. The measures concerned in particular expenditure control and rationalization. Subsidies granted to textile and agribusiness, were reduced by 10%. Revenues were increased notably through an increase in energy prices (electricity, gas and fuels) in 2014. This reduced the budget deficit to -4.9% of GDP in 2014. The latter is expected to fall to -4.9% of GDP in 2015.

Finally, the significant decline in oil tax revenues has undermined public finance. The revenues derived from oil taxes were cut by nearly 30% at the end of September 2015 compared to September 2014. In total, public revenues fell by 40.4% during the first 9 months 2015, compared to the same period in 2014.

The deficit of the public treasury widened by nearly 53%, to reach 1972.8 billion dinars at the end of September 2015.

In such a situation, the government conducted a 9% reduction in equipment spending and a freeze of recruitments in the civil service. In 2016, the implementation of measures to increase revenues is planned, particularly through expected increases in energy prices (electricity), transport prices and fuel prices.

Chart 4: Global Sales Treasury a percentage of GDP, 2011-2015



Sources: Ministries of Finance Data

3.4 INVESTMENT

Regarding investment, the region has particularly suffered from political instability, the slack of global economy, and a business climate that does not encourage investment.

In Morocco, total investment interrupted its annual increase that has started since 2010 to experience a decline in 2014, reaching $ 32.5 billion against $ 32.6 billion in 2013 (Ministry of Finance). This trend should continue in 2015 with a drop that is reported to be more significant down to $ 29.2 billion.

In Sudan, investment has increased very slightly in value, reaching 13.6 billion USD in 2014, against 13.3 billion dollars in 2013. The decline in oil revenues, and more broadly stagnation of the economy, have slowed down infrastructure development since the 2000s. However, various public projects are underway and will help, to some extent, to maintain the investment rate at a reasonable level.

In Egypt, a 9.2% increase was noted in the first half of the 2014-2015 fiscal-year, following a contraction of 6.3% in the first semester 2013/2014. The GFCF / GDP ratio is the lowest in the region, with hardly 14% of the GDP.

Investment suffers from a crowding out effect by public spending (credit to the public sector reached over 50% of GDP in 2014, and credit to the private sector dropped from almost 40% in 2008 to 25% in 2013) and a hardly competitive business environment (126th in 2015 Doing business).

In Mauritania, investment was driven by the mining sector and infrastructure spending. Equipment imports passed from an average of 200 billion Ouguiya over the 2010-2012-period to an average 581 billion over the 2013 – 2015-period. During the first 3 quarters 2015, they reached 626 billion Ouguiya, or 60% of total imports. The ratio of gross fixed capital formation/GDP reached 56% in 2014 (Table 3).

In Algeria, investment has grown steadily between 2010 and 2015, passing from 4,350 billion dinars in 2010 to 6311 billion dinars in 2014 (Ministry of Finance). The ratio of gross fixed capital formation / GDP is one of the highest in the region (Table 4). Investment was mainly driven by public investment, boosted by high oil prices. Algeria has actually launched a five-year development program with a budget of 286 billion dollars, dedicated to basic infrastructure.

Tunisia suffered political events that began in January 2011, the GFCF/PB ratio decreased from 24.6% in 2010 to 20.6% in 2014.

Table 4: GFCF reported to GDP (%)

	2010	2011	2012	2013	2014
Algeria	41,8	37,8	36,8	40,4	43,6
Tunisia	24,6	21,9	22,5	22,0	20,6
Morocco	30,7	30,7	32,6	30,3	29,4
Mauritania	36,5	38,0	51,9	56,8	
Sudan	19,0	19,0	20,0	20,0	20,0
Egypt	20,4	17,1	16,2	14,3	13,8

Source: Ministry of Finance in each country

For the whole of the region (excluding Libya), between 2012 and 2014, FDI inflows decreased from 22.852 billion US dollars to 18.793 billion US dollars (Table 5).

In Morocco, FDI decreased from 4.2% of GDP over the 2000-2007-period to 3.9% during the 2008-2014-period. FDI should represent 12.7% of total investment in 2015, against 11% in 2014. If the trend continues, catching up the North African average stagnating around 15.5% is expected to occur after a few years. In terms of geographical distribution, France is the largest investor country in Morocco, but its share fell from 43.1% between 2000 and 2007, to 39.2% between 2008 and 2013. This reduction was made in favor of other countries, such as the United Arab Emirates (5.3% between 2008 and 2013, against 2.5% between 2000 and 2007), Saudi Arabia (3.7% against 1.9%) and Kuwait (0.9% against 0.2%).

Table 5: FDI flows, million USD

Years	2010	2011	2012	2013	2014
Algeria	2300	2580	3052	2661	1488
Egypt	11008	9574	11768	10274	10893
Morocco	1574	2568	2728	3298	3582
Mauritania	131	589	1389	1126	492
Sudan	ND	ND	2311	1688	1277
Tunisia	1513	1148	1603	1117	1060
Total	16525	16459	22852	20164	18793

Source: Data compiled from national administrations (Central Bank, Ministry of Finance)

In Sudan, the share of FDI in investment has declined from 19.6% in 2012 to 16.1% in 2014, mainly because of regional turmoil and the decline in production in the hydrocarbon sector. A climate of unattractive business (Sudan ranks 149th of 189 in Doing Business in 2014) weighs on domestic and foreign investment, particularly in non-extractive sectors.

In Egypt, the ratio of foreign direct investment in the domestic investment of the country shows a return to rise after falling from 25.7% in 2008 to nearly 3% in 2011, mainly as a result of political instability. Since 2012, this ratio has been rising steadily, reaching 17.7% in 2015 (Ministry of Finance).

In Tunisia, FDI fell from 1.513 million dollars in 2010 to 1.06 million dollars in 2014. As the country has suffered from political instability, investors remained in a wait- and- see attitude due with regards to the security situation. FDI flows thus represented 2.2% of GDP, against an average of 5.4% during 2010-2014.

In Mauritania, FDI flows are very fluctuating, going from 589 million US$ in 2011 to 1.126 million USD in 2013, to return to 492 million US$ in 2014 (Table XX). FDI is mainly made in the mining and hydrocarbon sectors, which account for over 85% of FDI since 2010.

Finally, FDI in Algeria have been declining since 2012. After reaching 3.052 million US$ in 2012, they fell to 1.488 million US$ in 2014. FDI flows are small compared with the size of the Algerian economy, their weight in GDP not exceeding 1.5%.

3.5 FOREIGN TRADE

The majority of countries in the region have been experiencing structural deficit in their trade balance (Table 6). Some of them have managed to diversify their exports, but the whole of the region still depends on exports of low value-added commodity (primary sector or natural resources).

Table 6: external deficits (% of GDP)

	2011	2012	2013	2014	2015 (p)
Algeria	8,9	5,9	0,5	-4,4	-7,7
Egypt	-2,6	-3,9	-2,4	-0,8	-3,4
Morocco	-8,0	-9,7	-6,7	-5,8	-5,3
Mauritania	-5,1	-26,1	-25,1	-29,0	-25,8
Sudan	-1,9	-9,6	-8,7	-8,4	-6,8
Tunisia	-7,4	-8,2	-8,3	-8,9	-6,0

Source: National data

The structure of Moroccan exports experienced a significant change between 1998 and 2014, marking the structural transformation in progress. The share of machinery and transport equipment rose from 8.8% in 1998 to 29.2% in 2014, mainly as a result of higher exports of automotive sector. The shares of mining and chemical products have strengthened, to reach respectively 12.8% and 16.6% of exports in 2014, against 11.7% and 12.6% in 1998, thanks to strong exports of phosphates and derivatives. Clothing and agricultural products decreased from 35.5% and 22.8% respectively in 1998 to 13.9% and 19.5% in 2014. In 2014, the trade deficit dropped to -22.17 billion US$ (-6% of GDP), against -23.22 billion US$ (-7.6% of GDP) a year earlier. The trade deficit amounted late August 2015, to 104 billion dirhams, showing a decrease of 20.4% (26.7 billion dirhams) yoy. The rate of import coverage by exports is improved by 7.2 points to reach 57.8%. Exports increased by 6.6% while imports fell by 6.7%.

In 2014, the trade deficit of Sudan went down to 5% of GDP against 6% the year before, allowing an improved rate of coverage of imports by exports, which reached 53.6% against 54.8% in 2013. The deficit in the current account improved from 8.7% of GDP in 2013 to 8.4% in 2014[3]. Oil price cut severely impacted the volume of exports which went down by 9% compared with 2013, while production of the country's gold has been growing. Gold represented 29% of exports in 2014, reaching for the first time the same share as oil products. At the end of March 2015, the trade balance showed a deficit of 826 million dollars[4], with a progression of 37% compared to the first quarter 2014. The imports by exports coverage has deteriorated since it has dropped from 63.8% to 55.4% this term.

Egypt external situation remains fragile and dependent of the Gulf countries' funding (+2.4 billion $) and FDI (+5.7 bn USD). The balance of the current account reached a deficit of -4 billion USD during the first 3 months 2015 according to the Central Bank of Egypt. Between July 2014 and March 2015, the current account deficit reached USD -8.4 billion, or 2.5% of GDP (according to the Ministry of Finance). This is due in particular to a deterioration of the trade balance, which reached

- 8.8% of GDP, due to a decline in oil exports.

With the hydrocarbon sector representing 97% of the country's exports, Algeria suffers from lower oil prices. Thus, while the trade balance showed a surplus of USD[5] 2.93 billion in the first nine months 2014, it showed a deficit of USD 12.82 billion over the same period in 2015. Foreign exchange reserves of the country were thus reduced to 152.7 billion dollars at the end of September 2015, against USD 178.94 billion at the end of December 2014.

In Tunisia, over the 2015 first ten month-period, the trade deficit amounted to 10.23 billion TD. It fell by 13% compared to the same period in 2014, reflecting the improvement in food balance. It reached -6.8% of GDP in 2013, to return to 4.9% in 2014.

Mauritania's exports are highly concentrated, the country exports minerals (iron, gold, copper), oil, and fish. These products account for over 90% of exports. The trade balance is structurally in deficit exceeding 25% of GDP since 2012. During the first three quarters 2015, the deficit is estimated at 622 billion Ouguiya, against 405 billion Ouguiya in 2014 (Central Bank). Note, however, that the widening trade deficit is incumbent on the increase in imports of capital goods, especially in the mining sector. They increased from 28.4% imports in 2010 to 43.3% in 2014. In the third quarter 2015, they reached 410 billion MU, or twice as much their value in the third quarter 2014.

Intra-regional trade remains extremely low; intra regional exports represented only 6% of total exports in 2014, and intra-regional imports 5% of the North African imports (Table 7).

Table 7: Share of intra-regional trade in total trade in North Africa

	2010	2011	2012	2013	2014
Share of intra-regional imports	4%	4%	4%	5%	5%
Share of intra-regional exports	4%	4%	4%	5%	6%

Source: UNCTAD

North Africa's trade is dominated by Europe, which in 2014 accounted for 61% of imports in the region and nearly 49% of exports (Table 8). Asia is second, with 21% exports and 33.3% imports respectively.

Table 8: geographical distribution of North Africa's exports and imports, 2014

	Exports	Imports
Africa	7,90%	5,74%
America	9,77%	11,25%
Asia	21,07%	33,31%
Europe	61,10%	48,92%
Oceania	0,15%	0,78%

Source: UNCTAD

4. SOCIAL DEVELOPMENT

The year 2015 is a turn-about in the development agenda worldwide, marking the end of the scope of the Millennium Development Goals (MDGs). Fifteen years after the adoption of the MDGs, we are now witnessing the start of the 2030 Sustainable Development Agenda, which provides a roadmap for an ambitious sustainable and inclusive development for the 15 years to come.

As part of this process, North African countries have assessed the social progress achieved over the last 15 years. It appears from this assessment that significant progress has been made in achieving the MDGs. All countries are making increasingly important efforts to invest in human capital, which contributed to a significant reduction in poverty, an increase in child school enrollment rates, a significant decline in maternal and infant mortality or greater access to drinking water and energy, etc.

4.1 THE SITUATION OF HUMAN DEVELOPMENT

The latest report on Human Development (2015), published by the UNDP (Table 9) established that among the North African countries, Algeria is the highest ranked

(83rd), with a HDI of 0.736, followed by Libya (94th) with an index of 0.724, Tunisia (96th) with an index of 0.721, Egypt (108th) with an index of 0.690 and Morocco, which occupies the 126th position in the world with an index of 0.628. Then Mauritania comes with a HDI of 0.506 ranking it at the 156th place, and the Sudan 167th in the world with an index of 0.479.

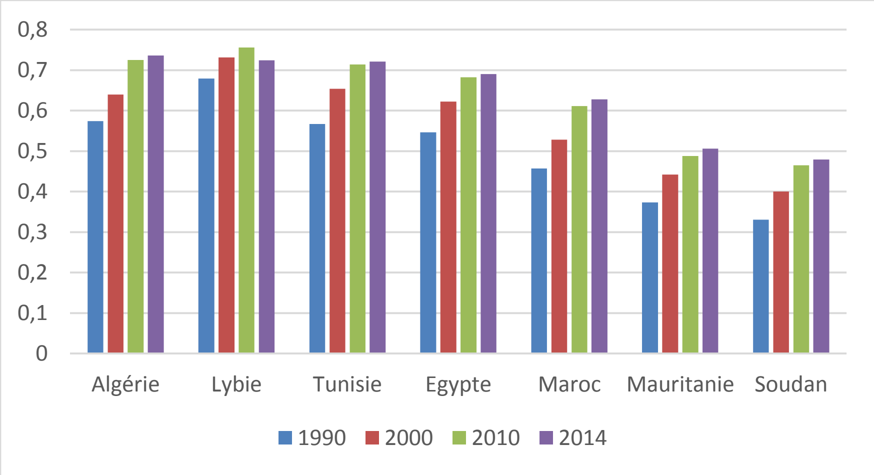
Table 9: Evolution of the Human Development Index HDI)

	Global Rank	*HDI 1990*	*HDI 2000*	*HDI 2010*	*HDI 2014*
Algeria	83	0,574	0,640	0,725	0,736
Libya	94	0,679	0,731	0,756	0,724
Tunisia	96	0,567	0,654	0,714	0,721
Egypt	108	0,546	0,622	0,682	0,690
Morocco	126	0,457	0,528	0,611	0,628
Mauritania	156	0,373	0,442	0,488	0,506
Sudan	167	0,331	0,400	0,465	0,479

Source: The Human Development Report (2015) published by the PN

Chart 5 shows that between 1990 and 2014, all countries improved their HDI, except Libya, which, due to the civil war since 2011, noted a decline in its HDI from 0.738 in 2013 to 0.724 in 2014.

Graph 5: Evolution of the Human Development Index (HDI)



Source: World Report on Human Development in 2015

4.2 PROSPECTS FOR ACHIEVING THE MILLENNIUM GOALS

4.2.1 Poverty

Poverty has certainly declined, but the results are contrasted across countries. Indeed, a first group of countries made up of Algeria[6], Libya, Egypt, Morocco[7] and Tunisia[8] can be said to have achieved the goal of poverty reduction. A second group, Mauritania[9] and Sudan, although they have significantly reduced poverty, yet, they could not achieve this goal (Table 10).

Table 10: absolute poverty rate in% of the population

Algeria	*0,4*
Egypt	4,4
Libya	N/A
Mauritania	25,9
Morocco	0,3
Sudan	26
Tunisia	3,8

Source: National Assessment Reports on MDGs

4.2.2 Education

The greatest progress concerns primary education for all. All countries of the sub-region have put education as a priority sector for their economic and social development, and have made great efforts towards education of children. Some countries achieved this MDG before time: Algeria, with a net enrollment rate of 98.16% of children aged six years, Egypt (93.3%), Morocco (9 .6%) and Tunisia (98%). Libya (98.2%) according to the 2008 figures, has also reached this goal, but the political instability it has been living since 2011 may affect this result (Table 11).

Table 11: Net enrollment rates by country

Algeria	**98,16%**
Egypt	**93.3%**
Libya	**98.2%**
Mauritania	**71,6%**
Morocco	**96.6%**
Sudan	**67%**
Tunisia	**98%**

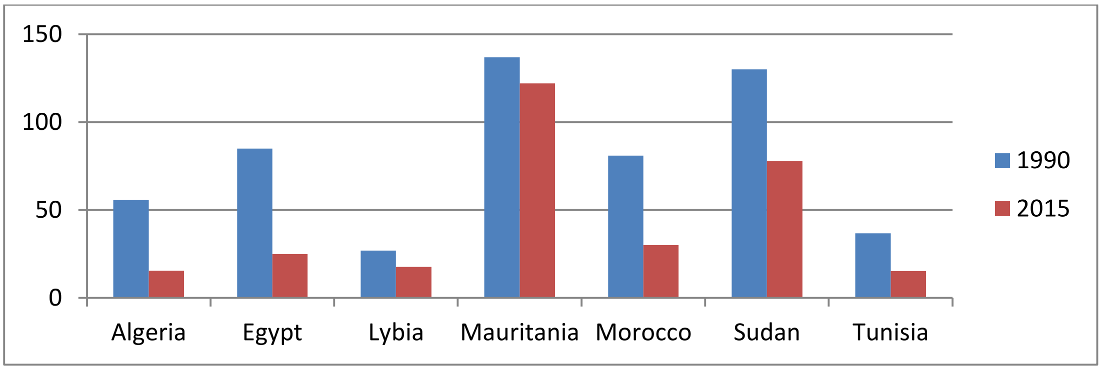
Source: National Assessment Reports on MDGs

Mauritania also very significantly improved the children net enrollment rate, passing from 49% in 1990 to 71.6% in 2008. With regard to Sudan, the net primary school enrollment rate is around 67 %, with a significant difference between urban (82%) and rural areas (60%), the highest rate (85%) being that of the capital city.

4.2.3 Net reduction of child-infant mortality

The number of deaths of children under five is declining in all countries of the sub-region as shown in Chart 6. However, it is still high in Mauritania (122) and Sudan (78).

Chart 6: Mortality of children under five (per 100,000 births)



Source: National Assessment Reports on MDGs

4.2.4 Reduction of maternal mortality

The MDG on maternal and reproductive health remains of some concern, despite the efforts and investments made in the health sector. Maternal and neonatal mortality remains unacceptably high for all countries (Table 12).

Table 12: Number of deaths per 100 000 live births

Algeria	73.9
Egypt	55
Libya	27
Mauritania	686
Morocco	112
Sudan	216
Tunisia	44.8

Source: National Assessment Reports on MDGs

5. CHALLENGES TO BE FACED

The region is facing many political, economic and social challenges.

5.1 POLITICAL STABILITY AND GOOD GOVERNANCE

Politically, the region is marked by periods of political instability in most countries. The political and social events that began in 2011, plunged Tunisia, Egypt and Libya in a period of uncertainty. Egypt and Tunisia, although still marked by a dwindling security situation, have undertaken political reforms that led to the presidential elections marking a return to political stability. Libya is still beset by political wrangling that significantly limits its growth prospects. In 2009, Mauritania managed to restore political stability that allowed an average growth rate of 5.5% over the 2010 – 2015-period. Egypt, thanks to the 2014 presidential elections, regained political stability which also allowed a return to growth.

Morocco and Algeria remain at the shelter of major political upheavals. However, all countries in the region suffer from lack of good governance. Political instability is to be linked to governance, especially economic governance, which certainly hinders the development of the region.

According to the Mo Ibrahim Index (Table 13), only Tunisia (8th place) is ranked among the top fifteen African countries. Sudan and Mauritania are respectively 51st and 50th. Morocco is ranked 16th and Algeria 20th. All the countries except Tunisia, are poorly ranked in terms of "Participation and Human Rights" (beyond the 33rd place).

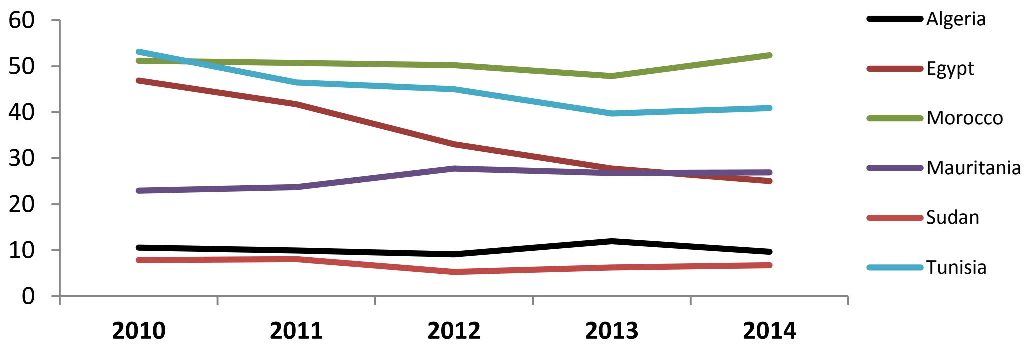
Table 13: Ranking of countries according to the Mo Ibrahim Governance Index, 2014

	Algeria	Egypt	Morocco	Mauritania	Sudan	Tunisia
global governance	20	24	16	41	51	8
Safety and Rule of Law	32	34	18	41	51	13
Participation and Human Rights	33	41	42	39	50	11
sustainable economic development	27	11	3	35	42	8
Human Development	7	14	12	33	50	5

Source: http://www.moibrahimfoundation.org

In terms of efficiency of public regulation (of an index of 1 to 100, with 100 being the best performance), no significant progress has been made since 2010. Only Morocco obtained a score higher than 50 in 2014 (Chart 7).

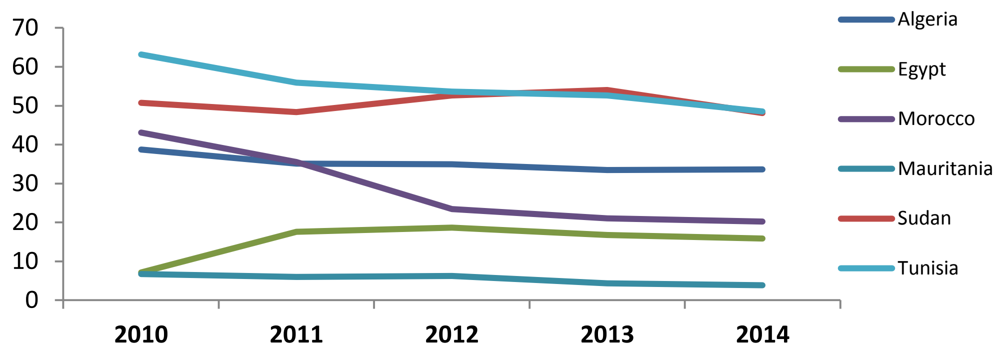
Chart 7: public regulation quality index



Source: www.govindicators.org

In terms of Government efficiency, little progress is to be reported, noting even a drop in performance for Egypt and Tunisia (Chart 8). No country achieved an index greater than 50, the highest score being that of Tunisia (49), followed by Morocco (48).

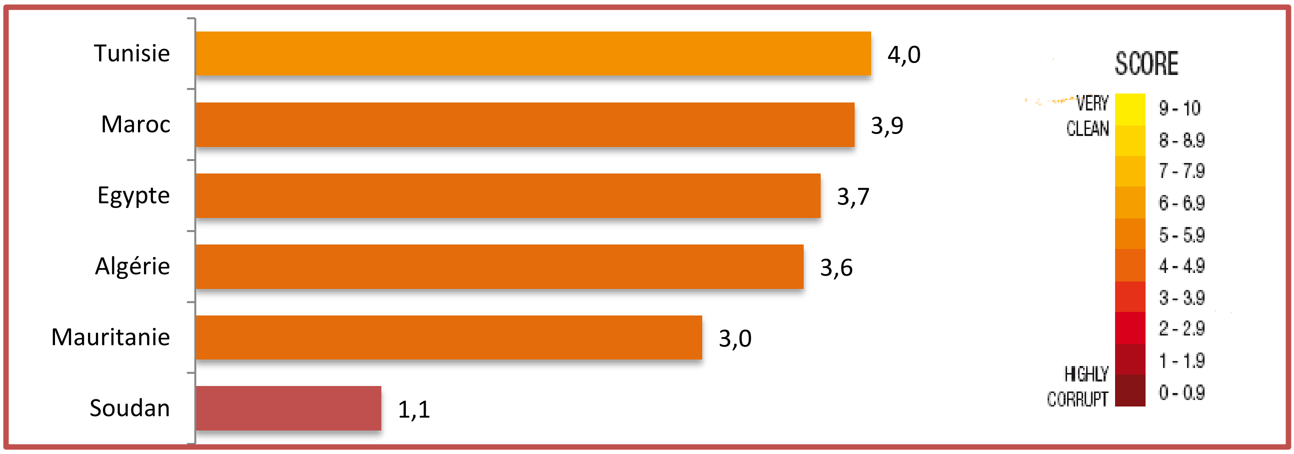
Chart 8: Government Efficiency Index



Source: www.govindicators.org

Corruption continues to be a major challenge for countries in the region. All countries are below 4, according to the Transparency International Index (Chart 9).

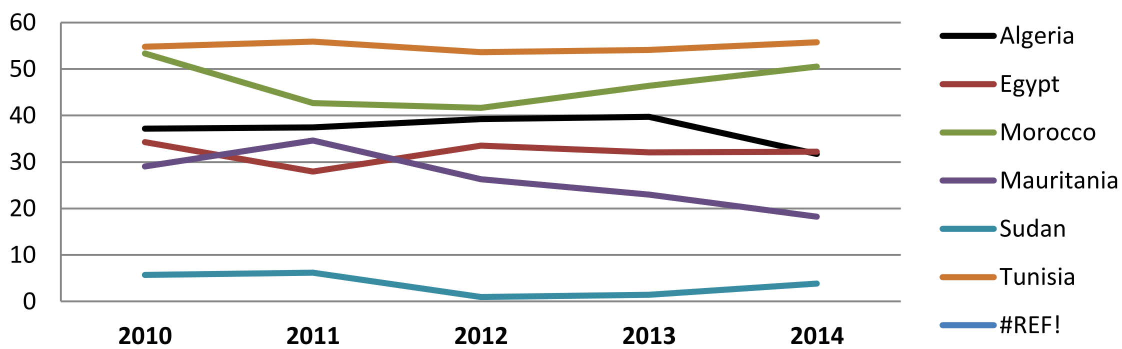
Chart 9: Corruption Perception Index



Source : Transparency International

In terms of corruption control, progress is insufficient (Chart 10). No country exceeds the score of 50.

Chart 10: corruption control index



Source: www.govindicators.org

5.2 DIVERSIFICATION

5.2.1 Economic diversification

The economies of the region remain insufficiently diversified, particularly in terms of exports. Their growth depends on primary sectors or natural resources. Algeria, Sudan, Mauritania and to a lesser extent Egypt, are extremely concentrated on exports of low value-added products (Table 14).

Table 14: Share of main exports in total exports in 2014 (%)

Sudan	Oil, gold, animals	77
Algeria	Hydrocarbons	95
Mauritania	Gold, fishing, iron	78
Egypt	Fuel, oil and derivatives	48

Source: National data (statistical institutes)

In contrast, Morocco and Tunisia have managed to diversify their exports (Table 15). Capital goods account for over 16% of exports in both countries, and consumer goods more than 32%.

Table 15: Share of main exports in total exports in 2014 (%)

	Tunisia	Morocco
Capital goods	16,95	16,77
Raw materials and semi-products	29,91	17,81
Consumer goods	32,75	28,89
Food	7,21	17,81

Source: National data (statistical institutes)

Development of the private sector remains a major challenge for the economies of North Africa. The business climate is one of the warhorses of the governments in the region. Only Morocco and Tunisia have a ranking lower than 100 in Doing Business (Table 16). Algeria and Egypt have fallen in the 2015 ranking. Mauritania has made significant efforts to improve the business environment since 2013, particularly in terms of business creation and access to loans. The Mauritanian government has adopted a new roadmap for the 2015 Doing Business.

Table 16: Ranking in Doing Business

	2015	2016
Algeria	161	163
Egypt	126	131
Morocco	80	75
Mauritania	176	168
Sudan	158	159
Tunisia	75	74

Source; World Bank

5.2.2 Diversification of resources

This insufficient economic diversification also weighs on the resources available to governments to support economic and social development.

For the majority of countries in the region, the state budget depends on a limited number of sectors and volatile resources. Progress has been made to improve public financial management and diversify resources, including tax, but much remains to be done. The weight of tax revenues in GDP is about 19% (Table 17) in all countries except Sudan (7.3%).

Table 17: weight of tax revenues in GDP, 2014 (%)

Algeria	19
Egypt	19,1
Morocco	19,2
Mauritania	19,3
Tunisia	19,8
Sudan	7,3

Source: National data (Ministry of Finance and Central Bank)

5.3 UNEMPLOYMENT AND YOUTH EMPLOYMENT

Unemployment is endemic in countries of the region, unemployment rate exceeds 10% in most countries (Table 18).

Table 18: Overall unemployment rate (%)

	2010	***2011***	***2012***	***2013***	***2014***	***2015 (e)***
Algeria	10,0	10,0	11,0	9,8	10,6	11,2
Egypt	9,0	12,0	12,7	13,2	13,0	12,8
Morocco	9,1	8,9	9,0	9,2	9,9	10,1
Mauritania			10,1		12,9	
Sudan*	14,8	14,8	14,8	15,3	15,4	
Tunisia	13,0	18,9	16,7	15,3	15,0	

Source: National data, (*) ILO data

Unemployment affects young people more (Table 19). It exceeds 25% in all countries except Morocco (19.3% in 2013).

Table 19: Unemployment rate of 15- 24 years of age (%)

	2010	***2011***	***2012***	***2013***	***2014***
Algeria	21,5	22,4	27,5	24,8	25,2
Egypt	24,8	29,7	34,7	34,3	
Libya			48,7		
Morocco	17,6	17,9	18,6	19,3	
Mauritania			28,3		
Sudan (*)	23,7	23,7	24	24,9	24,9
Tunisia	29,4	42,3	37,6	34,7	35,0

Source: National data (*) ILO

6. FOCUS: GENDER CONDITION IN NORTH AFRICA

Seeking Gender Equality: a slow process and parity to come

6.1 INTRODUCTION

The 2011 political upheavals in North Africa have opened the way for a long-term transition process and shed light *inter alia* on the needs and role of youth and women. For the latter, the promotion of their rights and progress towards gender equality are part of this process and should depend on a holistic development approach which should include, in an effective and sustainable manner, definitive and irreversible integration of gender issues in governance.

In fact, since the adoption in 1995 of the Beijing Declaration and Platform for Action for the promotion of the status and rights of women, progress has been made in North Africa towards equality between men and women, particularly in education, health, employment, participation in working life and political representation. However, large disparities persist when it comes to reality on the ground, and many differences are observed, particularly in areas such as participation in the labor market, access to productive resources and participation in decision making.

Women now account for 49.7% of the approximately 345.5 million people in the MENA region, yet they are still far from achieving their full potential, when we know that about 80% of those who are eligible to work do not participate in the labor market[10]. The national- proactive and ambitious policies in some cases- were not always sufficiently implemented, nor did they receive adequate financial resources likely to be sustained.

This updated overview of the gender situation in North Africa instructed by various regional and international indexes including the African Gender and Development Index (AGDI). This Index is a tool developed by ECA to assess the extent and real nature of the progress made by the countries of the region in this area. It goes beyond figures because it aims to highlight the barriers to the full participation of women in the development of the region, and to provide policy makers with a source of reliable data to better understand the organic link between gender equality and sustainable development, and integrate it into their national development policies and strategies.

6.2 EDUCATION

North Africa has filled the gap of gender in basic education. According to the 2015 Report on the Millennium Development Goals, this region achieved over the last two decades the greatest improvement in youth literacy, especially among young women (with South Asia)[11]. In Algeria after independence, there was a widespread education for all girls now giving 65% of female graduates. With a 100% completion rate of the primary and 98% transition to secondary education, we can consider that this country has almost achieved universal primary education while achieving gender parity on this level. In Tunisia, female enrollment reached 98.8%, higher than that of males, 98.3% between 1990 and 2014. In Morocco, the national level of parity index between sexes (IPS) in the public primary education is 0.91 (91 girls against 100 boys enrolled) in 2013-14, reflecting almost equal access opportunities between both sexes[12]. Mauritania has also achieved gender parity in primary education, with a ratio of 1.02 for girls versus boys in basic education. In Sudan, the most remarkable gain is the clear improvement of girls' access to education (primary) and the reduction in the gap compared with boys (12.6% to 8.3% in 2007)[13].

- In secondary education, gender parity was reached in 2015 in most countries in the region. Egypt, for example, exceeded the goal of gender parity in terms of completion of secondary education: 83.4% for girls against 74, 8% for boys, or a ratio of 1.1 (Source: ECA, September 2015). In Libya, about 56% of adult women have at least high school education level, according to the 2015 Report on the Millennium Development Goals. In Morocco, the enrollment rate in this level is 91.2% male-urban, against 83.2% female-urban (a ratio of 0.8), compared to less advantageous rates in rural (39.3 % for boys, against 21.9% for girls, a ratio of 0.55)14. In Mauritania, the parity between girls and boys is still not carried out

[1] http://www.uis.unesco.org/Education/Documents/oosci-summary-menaFR.pdf

in secondary education (a gross rate of 33% for boys, against 28.4% for girls in 2008, a difference of more than 4 points in favor of boys).[15] In Tunisia, the enrollment rate in secondary education reached 90.2% for girls and 89.7% for boys. In 2012- 2013, the dropout rate in secondary education became higher among boys than girls, and appears more emphasized in west central Tunisia16. For its part, Sudan is not far from achieving parity with 43.3% of girls who completed the secondary course compared to 49.5% for boys, a ratio of 0.9 (ECA September 2015).

- In higher education, however, North Africa has a special feature: the biggest gender disparity in enrollment rates is done at the expense of men. In Tunisia, for example, girls' enrollment increased from 6% to 45% between 1971 and 2011, thus surpassing boys (29.5%). In Algeria, girls in higher education represented a rate of 59% over the 2006 – 1012-period. In Egypt, parity has been reached, with an enrollment rate of 30, 6% for boys and 29.5 % for girls, which gives us a ratio of 1.017. In Morocco, in public higher education, the number of students reached 543000 in 2013, of which 52.11% boys and 47.88% girls, a ratio of 0.92. In Libya, according to the 2014 Report on gender disparity, women have more or less equal access to education because 32% of women and 33% of men have a university or undergraduate degree. In Mauritania, disparities are even more assertive in higher education where the parity target remains very far: for example, girls account for only 24.5% of the number of students at the University of Nouakchott. Sudan for its part shows an over- parity for girls: in 2013, more women were enrolled (18.1%) compared to men (16.2%), a ratio of 1.1 (World Bank).

6.3 WOMEN'S ACCESS TO EMPLOYMENT

According to the 2015 Report on the Millennium Development Goals, women's participation in the workforce remains particularly low in North Africa, where women’s participation rate is equal to a quarter or a third of that of men. Apart from agriculture, the participation rate of women’s labor is the lowest in Africa, and women's access to non-agricultural paid employment remains particularly low (Table 20). Moreover, although women in this region perform the majority of agricultural activities, they face various obstacles to realizing their full potential (restrictive cultural practices, discriminatory laws, highly segmented labor markets). In Egypt, for example, only 26% of women are employed and female unemployment reached 24.8% in December 2014 against only 9.2% for men. Only 30% of women participate in the labor market, against 76.4% for men. However, if the employment rate of women was equivalent to that of men, GDP in this country would be higher by 34% from 2020, according to the IMF18. In Morocco (133rd position/ out of 142 according to the 2014-2015 report of the World Economic Forum on gender inequality), the national participation rate achieved in 2014 (formal and informal sectors) was 34.3%, of which 54, 1% of men and only 14.7% in women, thus giving a ratio of 0.27. In Tunisia, Article 5 (b) of the Labor Code prohibits sex-based discrimination, while workplace equality is enshrined in Article 40 of the new Constitution adopted in January 2014. However, according to official statistics, 21.9% of women were unemployed in the first quarter 2014, against 12.8% in the case of men. A small percentage of 25.8% of women participated in the labor market in 2012 against 70.3% of men. Although there are more women than men enrolled in higher education, women are often in areas where unemployment rates are highest (only 29% of engineering students are women). This unequal access pushes women into the informal sector, which represents 54% of jobs and affects 85% of Tunisian companies.19 In Libya as in Sudan, high gender disparity persists in the area of access to employment. According to the competitiveness index in the 2014-2015 world, Libya ranks 131st out of 144 countries with regard to the proportion of women in the workforce; while according to the AGDI, Sudan is far from parity in all sectors of employment, with an overall score of 0.4 as 93.1% of men participate in the labor market, while the percentage of women does not exceed 33.2% (ECA, September 2015). In Algeria, according to the Algerian National Board of Statistics, 19% of women worked in 2013. In the period between 1962 and 2014, the number of employed women increased by almost 20 from 90500 (5.2% workers from both sexes) to 1,722,000 (16.8%) in 2014. A survey conducted on unemployment in 2014 by the Algerian National Board of Statistics estimated that unemployment rate was 8, 3% for men, but reached 16.3% for women.

6.4 ACCESS TO DECISION-MAKING POSITIONS

i) In business and management

At African continent level, according to ADB 2015 Index of gender equality, the proportion of women holding the position of Managing Director of a company within the formal sector is only 15%. This average is even lower in North Africa where more than one private company out of eight is run by women, according to a study by Al Masah Capital Group published in August 2013. It is clear that the "glass ceiling" remains a constant reality for women in the region; and the proportion of North African companies held and managed by women varies considerably. In Tunisia, for example, 30% of companies have a woman as a leader; and according to data from the ECA published in September 2015, in Egypt 7.1% companies have a woman at their head (a ratio of 0.1), while in Sudan, only 3.4% of companies have women in the position of managers and executive directors. Morocco (like Tunisia) has a woman at the head of the National Business and Employers Confederation, , but according to a survey in 2013 by INVEST HR, Moroccan women serving as DGs represent only 13% in domestic enterprises, against 7% in multinational corporations. In Algeria, according to a report published in January 2015 by the International Labor Organization (ILO) "Businesswomen and female executives: a thrust built-up", the percentage of female managers is 4.9% despite a high level of education and a high activity rate[20] (the world average is 5% according to the same report)

ii) In the civil service

In North Africa region, the feminization of public administration remains average, and the share of women in decision making positions is still low. In Algeria, for example, according to an ILO study conducted in 2013, "only 9% of women have positions of responsibility"[21]; and managerial occupations (managers, executives and administrators) account for only 1.6% of total women's employment against 2.9% for men. Tunisia, according to the UNDP report "Gender equality in public administration 2014," has 41% women in the public sector and 27% of them are in decision making positions, while for Morocco, according to the same source, the percentages for both categories are 34% and 15%, respectively (year 2009)[22]. These rates increased in 2013 to reach 39.4% and 16% respectively, according to the latest report of the Ministry of Public Service and modernization of the administration (2015)[23]. In Egypt, the administration is marked by verticality in which women find it difficult to access positions of responsibility and power. Thus, in the public service, the percentage of female senior managers is 25.3%, compared to 74.7% of men, a ratio of 0.3, according to the analyses of the AGDI (September 2015). In Sudan, the disparities are far more important with only 4% of women as senior executives in the public service, against 96% for men (AGDI September 2015).[24]

Table 20: Women Indicators in Development in North Africa

Countries	Female population % Of total 2014	Women and paid work / nonagricultural % women 2013	Part-time female work % Of total 2009-2014	%Men contributing to family work 2014	% Women contributing to family work 2014	Women Parliamentarians / Senior Managers / Managers % Of total 2008-2014	Women in Parliament % Of total 1990	Women in Parliament % Of total 2015
Algeria	49,7	18	-	1,6	1,6	11	2	32
Egypt	49,5	19	-	5,5	34,9	7	-	-
Libya	49,6	-	-	-	-	-	-	16
Morocco	50,6	22	-	-	-	-	0	17
Mauritania	49,7	-	-	-	-	-	-	25
Tunisia	50,6	28	-	3,5	6,9	-	4	31
Sudan	49,8	-	-	-	-	-	-	31

Source : http://wdi.worldbank.org/table/1.5

6.5 ACCESS TO PRODUCTIVE RESOURCES

To make real progress on gender equality and empowerment of women in the North African region, it is critical to solve one of the main areas of gender inequality that is the still too unequal access of women to resources and their limited control over assets and ownership. During the past decade, governments in the region have certainly made efforts on legal, institutional and financial matters to reduce disparities in this specific area. However, the economic empowerment of women remains weak and fragmented, and progress achieved is below requirements, as depicted by the following indicators:

i) Access to land and livestock

Women represent less than 5% of all agricultural landowners in North Africa, in spite of national constitutions in some countries that are basically for equal access to land,like Algeria and Tunisia. However, insecurity of land tenure, biased legal environments, inheritance laws and the habits and customs still restrict women's ability to own or manage assets and production resources. In Algeria, the government has implemented pioneering strategies for solving problems related to gender inequality (the 2008-2013 National strategy for the integration and promotion of women and the 2010-2014 Action Plan, the National Campaign to encourage the participation of rural women in the context of the 2009-2014, the New rural and agricultural policy, etc.). In Morocco, only 5.3% of women have access to farmland ownership (25.3% for men) and 16.1% of women access to ownership of livestock (against 30.9% of men). In Tunisia, 17.6% of rural women are autonomous and self-employed compared to 32% of men, demonstrating unequal access to resources and to economic empowerment opportunities[26]. In Libya, according to the ADB Survey on the situation of women in Libya (2013), "only 12% of women own a piece of land or a house"; and in Egypt, where 55% of the population live on agriculture, only 5% of women are land owners, representing a ratio of 0.1 (ECA, September 2015). This percentage is higher in Sudan where, according to AGDI, although 20% of Sudanese women own land (ratio 0.3), their farms remain far smaller than those of men.

ii) Access to credit

Women's access to financial services is often faced with barriers such as illiteracy, lack of identity documents and low mastery of financial matters. Progress has been made especially at the micro financing level, yet the actual participation of women in economic life must go beyond the modest level of microenterprise.

According to ECA study - Office for North Africa on " *Access to funding for rural women in North Africa*[27], the disparity between urban and rural areas is very large. In rural areas, it is the informal sources that dominate especially for women. Microcredit is the most important formal resource in rural areas, but in general, access to this kind of resource remains low. In Tunisia, in rural areas, women that are granted micro-credits by microcredit associations are few, while those receiving credits from ENDA (Third World Environment and Development) constitute 65% of total beneficiaries. In Morocco and Egypt, access is unequal between men and women and between urban and rural women, despite the significant development of micro finance in rural areas over the last decade[28].

Notwithstanding these access difficulties, female entrepreneurship is progressing. In Algeria, since 2008, the sector has achieved an annual average evolution of 14%, according to the National Investment Development Agency (ANDI, 2014). Since its launch in 2004, the National Microcredit Management Agency (ANGEM) funded and implemented 653,363 national micro-activities. Nearly 404,723 projects were initiated by women, meaning a female presence in more than 61.74% micro-activities. However, , the number of loans granted to men is 248,640 or 38.06%[29]. Loans in rural areas account for about 27% of loans, still with the proportion of 60.5% of women by area and with respect to the total credits granted. In Tunisia, regarding financial inclusion of women, according to the World Bank (2011), 25.3% of women have access to the services of conventional finance against 39.2% of men. The banking of Tunisian women remains higher than in Egypt (6.5%) and Algeria (20.4%); and close to the levels shown in Morocco (26.7%). Among the 210548 customers of the 15 largest Tunisian AMCs, 45% are women (2010). In Egypt, according to the 2013 Social Fund for Development Report, 24% of women were able to benefit from small and micro credits against 72% of men, a ratio of 0.3. Moreover, only around 20% of women entrepreneurs resort to commercial banks for loans, but the risks of rejection are higher for women than for men (6% against 4.5%). In Libya, according to the Survey of BAfD on the Status of Women (2013), the majority of women currently married or divorced have no access to economic resources. Indeed, in 1000 women surveyed, 59% of them have no personal savings, 64% do not have any valuables such as jewelry or a car. In Morocco, things are progressing slowly, and the proportion of women who hold an account at a formal financial institution was 26.68% in 2011 against 52.04% for men, while the proportion of women with a loan from a formal financial institution was 3.6% against 4.3% for men[31]. In 2012, microcredit benefited to 55.3% women[32]. In Sudan, according to the Sudan Beijing + 20 Assessment Report (March 2015), 12% of commercial bank credits are devoted to microfinance. 70% of these credits are for rural areas and 30% are allocated to women.

6.6 ACCESS TO POWER / PARTICIPATION IN POLITICAL LIFE

Political representation of women has increased and some countries have made concrete progress, in particular through the introduction of quotas in parliament. However, these quotas should be accompanied by a structural change of the political system for more public involvement and more effective accountability obligation.

i) Parliament and elective bodies

The average percentage of women in parliament in the MENA region is 7%[33]. In 2015, women in Algeria represented more than 31% MPs, the same in Tunisia where there are 67 women deputies out of 217 (30.88% against 24% in 2011). In Mauritania, women hold 31 of the 147 seats in the National Assembly and 9 of the 54 Senate seats. The same progress in Sudan where, according to data from the Sudanese National Assembly, the presence of women has increased over the years (35 women in 2001 against 112 in 2010, 9.7% and 25% respectively). However, women's representation in the lower house is still low (24.3%) compared to that of men, 75.7% (ratio 0.2). In Morocco, the House of Representatives includes 67 women (2011) on a total of 395 MPs (16.96%), giving a ratio of 0.16. In September 2015, the dual municipal and regional polls opened the door of the House of Councilors to 14 women out of 120 constituents (11.67%), a ratio of 0.11. In the elections of the Communal Councils, women won 6,673 seats, and at in the Regional councils elections , they accounted for nearly a third of the total number of constituents. These advances also concern Libya whose 16.5% of parliamentary seats in the General National Congress (GNC) are held by women (2014)[34]. In Egypt, women hold 7 seats, or 2% against 98% for men (0.0 ratio), and in key areas such as Justice, the percentage of women in decision-making positions rarely exceeds 0.4%, against 99.6% for men.[35]

ii) Access to ministerial positions

The progress made by the North African region is less obvious with regard to this indicator. Gender inequality is apparent in all government formations of countries in the region: in Algeria, the government has 7 women ministers out of 33; in Mauritania, 8 women were appointed to ministerial positions out of 30 (2014); in Sudan, the percentage of women ministers is 15.2% compared to 84.8% for men (0.2 ratio). The percentage of women ministers is even more modest in Egypt (3 women ministers out of 33), in Morocco (2 women out of 21) and in Tunisia (3 women ministers out of 28).[36]

6.7 INSTITUTIONAL AND LEGISLATIVE FRAMEWORK

- The Beijing Platform and CEDAW

All countries in the region have indicated in their national review reports on Beijing + 20 the existence of institutional mechanisms for women's promotion, along with the formulation of legal, political or strategic frameworks to promote gender equality and women's empowerment, in implementation of the Beijing platform for action . Moreover, all countries in the region have ratified the Convention on the elimination of all forms of discrimination against women (CEDAW), but **Tunisia** is the only country which, in April 2014, removed all its specific reservations to this Convention.[37]

- Measures taken to fight against Gender-Based Violence (GBV)

In most countries in the region, we note the establishment of laws and regulations for the protection of women (Algeria, Tunisia, Egypt, Morocco, etc.), the institutionalization of care for women and girls that are victims of violence (Algeria, Morocco, Sudan) and the establishment of an institutional information system on GBV data collection (Morocco, Tunisia). Furthermore, other countries have conducted large-scale studies on domestic violence to refresh the data and stimulate targeted interventions (Algeria, Egypt, Morocco, Tunisia).[38]

- Measures against girls' school dropout

Almost all governments in the region have taken steps to remove barriers to girls' access to education, resulting in the introduction of free and compulsory primary education (Algeria**,** Egypt**,** Mauritania**,** Morocco**,** and Tunisia). Various programs and projects have been implemented in many countries to strengthen the retention of girls in schools as a way to fight, *inter alia*, the reappearance in the area, of the early and / or forced marriage phenomenon. Some have launched a comprehensive housing program for girls in the form of boarding schools near the high and secondary schools (Morocco**,** Tunisia), and Egypt has also legislated to protect girls against sexual harassment at school.[39]

6.8 CONCLUSION

With the wind of change blowing across North Africa, the countries of the region now have a historic opportunity to improve current trends in gender equality, as summarized in Table 21. They should take this opportunity to conduct an inclusive national dialogue on the major issues of transition, including the reduction of gender disparities and the promotion of gender-sensitive policies. To achieve these objectives effectively, it is crucial to focus on gender inequality main areas, such as discrimination in law and sex-based practice, violence against women and girls, unequal access to professional opportunities, unequal distribution of domestic and unpaid social work, limited access of women to productive resources and unequal participation of women in decision-making. The data indicated in this study are an evidence thereof: when countries give so much importance to girls and women as to boys and men, when they invest equitably in women's skills development, when they offer them greater opportunities to generate income and participate in the economy, everyone is reaping the dividends: the women themselves, their families, their communities, their societies and the economies of their countries. It is the characteristic of inclusive development and good governance, two key policy levers for real transformation in North Africa.

Table 21: Gender Equality: North Africa regional trends [40]

Countries/ Rank		Global	Economic opportunities		Human Development		Laws and institutions	
Countries	**Rank**	**Score**	**Score**	**Rank**	**Score**	**Rank**	**Score**	**Rank**
Algeria	21	57,6	41,6	46	88,9	7	42,1	25
Egypt	35	49,3	47,1	42	84,6	10	16,2	45
Libya	49	37,9	11,8	52	89,5	6	12,5	49
Morocco	26	52,9	38,1	48	79,0	13	41,7	26
Mauritania	46	41,9	53,2	35	58,6	33	13,9	47
Tunisia	17	60,4	53,6	34	93,5	2	34,1	33
Sudan	51	31,9	46,0	44	43,4	43	6,2	51

Source: gender equality index in Africa –BAfD 2015

Footnotes:

[1] For further information, it is recommended to consult the future report on the indicated index and website, to be launched by the end of 2015.

[2] latest available national statistics

[3] The data in this section, unless otherwise stated are provided by the Central Bank of Sudan

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[5] Contingency note of the Bank of Algeria, January 2016

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[13]http://www.uis.unesco.org/Education/Documents/oosci-summary-menaFR.pdf

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[16] national report of Tunisia on Beijing +20 (July 2014)

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