NORTH AFRICA 2030:
What the Future Holds for the Region

edited by **Karim Mezran** and **Armando Sanguini**
preface by **Frederick Kempe** and **Giampiero Massolo**

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The Atlantic Council is a nonpartisan organization that promotes constructive US leadership and engagement in international affairs based on the central role of the Atlantic community in meeting today's global challenges.

Table of Contents

Preface

"Everything must change for everything to remain the same". This is a famous quotation from a famous Italian book, *The Leopard* by Giuseppe Tomasi di Lampedusa, but it could apply to the North African region all the same.

Over ten years after the "Arab Spring", the turmoil that swept across the region has taken many forms, bringing about change, although not always in a desirable direction. While Tunisia has embarked on a frail and uncertain transition towards democracy, Libya, just across the border, has plunged into a civil war that has left the country embittered and still unable to mend its open wounds. But the Arab uprisings have also brought about a surprising amount of "more of the same". A decade on, the problems that plagued the region in 2010 have not gone away. If anything, chronic unemployment, corruption in the public administration, sectarian divisions, and radicalisation can be found in similar amounts across the region.

This report finds its biggest strength in refusing to dwell in the past, instead looking at the future of the region. It asks: what will North Africa be in 2030? When North African citizens in 2030 look back to the decade just passed, what will they see? Which direction could the region as a whole, and specific countries, take, and which challenges will they have to face?

In a sense, the temptation to argue that North Africa in 2030 will be very similar to North Africa in 2021 is strong. In historical terms, ten years are very little time for the region to become radically different from what it is now. And the 2011

Arab uprisings are further evidence that even radical events could bring about precious little movement on many fronts.

However, the challenges facing the region today are increasingly laid bare before our eyes. Hailing from within or outside the region, they are the result of structural trends that will necessarily need to be tackled, and will shape the future trajectory of the whole region. Take the green and climate transition. Ten years from now, global fossil fuel consumption will need to be much lower than it is today. The largest importer of North African oil and gas resources, the European Union, is looking to cut emissions by 55% by 2030 compared with 1990, further accelerating its move away from fossil fuels compared to the past two decades. For energy-poor countries such as Morocco and Tunisia, this may not be a problem, but for "rentier" states such as Libya and Algeria, it calls for careful planning and preparation. In a sense, the global energy transition might fuel regional instability.

This Report also serves as a stark reminder that the shape of North Africa in 2030 will have profound implications for European countries, and for the US as well. In the past few years, instability in the Sahel has frequently spilled over, reaching even core areas of North African countries, as security forces focus on domestic problems and divisions rather than on countering violent actors. This in turn poses a serious security problem for the Europeans. If the "arc of instability" continues to draw nearer to the Mediterranean shores, the EU will need to devote much more attention to North Africa than to other pressing foreign policy matters, including the rising US-China confrontation. Surely, the White House would prefer otherwise.

And the implications for Europe and the US are not only political, but also socio-economic. If North African citizens continue to believe that their best option is to move north, migratory pressures towards the EU will only increase, as they are already doing in the post-Covid period (the number of irregular crossings from North Africa to Europe rose from 40,000 in the year before March 2020 to 110,000 in the past twelve months).

This is why this Report is important. It allows readers to reflect on the future of the region, and requires every stakeholder to reflect on what they want the future of North Africa to be. Because maybe, and just maybe, for things to change in North Africa it is not always necessary "for everything to remain the same".

Frederick Kempe   *Giampiero Massolo*
President and CEO, Atlantic Council   *President, ISPI*

1. Political, Economic, and Security Challenges in North Africa

Yahia H. Zoubir, Abdelkader Abderrahmane

The so-called Arab Spring that started in North Africa and the Middle East a decade ago was perceived as a major sociopolitical and economic milestone for the populations of the region. The hope was that the incumbent regimes would finally move away from authoritarianism and allow for greater political participation, good governance, and human security.[1] Instead, North Africa has faced increasing sociopolitical, economic, and security turmoil, impacting in turn the contiguous Sahel region and vice versa. The Arab uprisings have also led to deeper instability englobing the entire Sahelo-Maghreb region, resulting in formidable challenges for this region.[2] Terrorism, drug and arms trafficking, illegal migration, and internal unrest are among the numerous security issues that these states have faced. By 2015, the instability of the southern Mediterranean area, which includes the Levant, had spilled into Europe, which witnessed waves of tens of thousands of refugees and acts of terrorism.[3] Adding to regional instability is the Sahrawi nationalist movement's November 2020 resumption of

[1] Y.H. Zoubir, *Security Challenges in the Maghreb: the Nexus Between Bad Governance and Violent Extremism*, EuroMeSco Policy Brief, no. 70, 2017, p. 1

[2] *Development and Security Challenges in the Sahel Region*, NATO Parliamentary Assembly, Mediterranean and Middle East Special Group (GSM), rapporteur Ahmet B. Çonkar, update of December 2020.

[3] Zoubir (2017), p. 2.

hostilities in its decades-long Western Sahara conflict with the Kingdom of Morocco.[4]

Domestically, North African governments have yet to satisfy the demands advanced by their respective citizens since 2011. The reasons behind these uprisings remain similar, and lead to recurrent and sometimes massive demonstrations and claims for political change, as witnessed in Sudan and Algeria in 2018-19. Protests movements in North Africa have been cyclical, although those of 2010 have had the greatest impact, particularly in Libya (leading to civil wars) and Tunisia (with its uncertain democratic transition). Bad governance will no doubt incite protests in the next decade. Finally, the COVID-19 pandemic, which spares no country, has affected North African economies, which could unleash new forces of contestation. While it is too early to assess its long-term effects, this pandemic may offer windows of new opportunity for these states to assess the shortcomings of their governance and introduce reforms, particularly in terms of human security, which "encompasses human rights, good governance, access to education and health care, and ensuring that each individual has opportunities and

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[4] The Frente Popular de Liberación de Saguía el Hamra y Río de Oro (Popular Front for the Liberation of Saguia el-Hamra and Río de Oro), known as Polisario or Front Polisario, was formed in 1973 to fight Spanish occupation of what was then Spanish Sahara. When Spain withdrew from this nonself-governing territory (https://www.un.org/dppa/decolonization/en/nsgt), Morocco and Mauritania invaded it despite the International Court of Justice's nonrecognition of their territorial claims in October 1975. The United Nations recognized the right to self-determination of the Sahrawi people and asked for the decolonization of the territory; the UN also recognized Polisario as the legitimate representative of the Sahrawi people; see UN General Assembly, Resolution 34/37, Question of Western Sahara, A/RES/34/37 (November 21, 1979). Mauritania withdrew in 1979, while Morocco has continued its occupation to this date. The war between Polisario and the Morocco Armed Forces lasted from 1976 until a UN-brokered cease-fire was signed on September 6, 1991. The cease-fire included the creation of the UN Mission for the Referendum in Western Sahara (MINURSO), which has never taken place due to Morocco's refusal. For details, see S. Zunes and J. Mundy, *Western Sahara: War, Nationalism, and Conflict Irresolution*, Syracuse, New York, Syracuse University Press, 2010.

choices to fulfill his or her potential".[5] The nexus between security and development, which includes a wide range of issues related to human security such as economics, food, health, environment, and political security, remain key referents for assessing peace and development.[6]

The North African Context

Before the 2010 regional uprisings, the nature of the political systems accounted for citizens' frustrations. Authoritarianism characterized the type of regime despite the cosmetic changes the regimes made occasionally. Since then, the COVID-19 pandemic has reinforced social control.

Algeria witnessed a unique protest movement in 2019 as President Abdelaziz Bouteflika sought a fifth five-year mandate, despite ill health, and forced his removal after a twenty-year sultanic rule. The protests began on February 22 and continued every Friday thereafter, with the *Hirak* (literally, protest movement) gathering millions of Algerians. Although Bouteflika was removed on April 2, 2019, the protests continued. Algerians called for the entire political system to be dismantled and replaced by a new form of governance with anti-corruption measures, accountability of officials, political participation, and clean elections. Algerians pursued these demands until the movement suspended its protests due to the COVID-19 pandemic and the potentially lethal consequences of gatherings without social distancing. The movement eventually resumed for a few weeks in February 2021, until the authorities ended it in May.

[5] Kofi Annan discussed his conception of human security in the following remarks: "Secretary-General Salutes International Workshop on Human Security in Mongolia", Two-Day Session in Ulaanbaatar, May 8-10, 2000, Press Release SG/SM/7382, and as seen in "Definitions of Human Security: United Nations Definitions", footnote 4.

[6] United Nations Development Program, *Human Development Report 1994*, New York, Oxford University Press, 1994, p. 22.

Since Bouteflika's resignation, the state implemented a road map that included steps such as holding the presidential election in December 2019, which brought to power Abdelmadjid Tebboune; a referendum on a new constitution on November 1, 2020; and legislative elections on June 12, 2021. Though extremely low turnouts at the elections raise questions about representation and democratic prospects – the protest movement boycotted both elections as well as the referendum – US statements, news accounts, and author interviews in Algeria do not suggest rigging or significant irregularities.[7] Meanwhile, an anti-corruption drive that is continuing has already resulted in a major achievement: the imprisonment of dozens of former prime ministers, ministers, and high-ranking military officers. The leaderless Hirak has contested the road map; however, it has failed to enter any dialogue with the authorities or to propose alternatives. Instead, it accused anyone calling for dialogue of being a traitor.

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[7] Y. Zoubir conducted separate phone interviews, on September 22, 2021, with two professors at the University of Algiers, who both stated there was no rigging of the elections in the last two years. Laeed Ladgham, Professor of information and communication, stated: "Elections were overall free and fair. … I did not hear any voices contesting the elections in terms of rigging, but of course speculations were aired about some practices of manipulation, but they remain to be verified". Cherif Dris, Professor of journalism and political science, stated: "There was no fraud during the elections, except perhaps a slight inflation by the regime of the percentage of participation in the different elections. What is sure, the electoral support of the regime has dropped considerably". Regarding the 2019 presidential election, the US State Department, for instance, says: "Observers characterized the elections as … conducted without significant problems or irregularities, but noted restrictions on civil liberties during the election period and lack of transparency in vote-counting procedures". Meanwhile, Imad K. Harb, Director of research and analysis at Arab Center Washington DC, sees in the 2021 legislative elections "the entrenchment of an electoral authoritarianism that borrows democratic practices without implementing democratic rule. US State Department, "2020 Country Reports on Human Rights Practices: Algeria", State Department website, accessed September 13, 2021; author interviews; and Harb, *Algeria Reestablished Authoritarianism through Elections*, Arab Center Washington DC, July 1, 2021.

Morocco had its own Hirak during 2016-2017 in the Rif region in the northern part of the nation, mainly in the city of Al Hoceima. Moroccan protesters demanded improved socioeconomic conditions, but were met with harsh repression by authorities and sentencing of protest leaders to long jail terms. Politically, the ruling coalition that emerged from the 2016 legislative elections, led by the Islamist Justice and Development Party (PJD), is fragmented. Though the latter enjoys a comfortable majority in the Parliament of Morocco, the king and his cabinet are the de facto decision makers. Despite the constitutional reforms that followed the protests in 2011, Morocco's political system remains an authoritarian monarchy,[8] with King Mohamed VI retaining most powers. Like in the other states in the region, the pandemic has exacerbated political and social instability amid high unemployment and reduced income—tourism accounted for 6.9% of gross domestic product in 2018,[9] and tourism revenue plummeted 53.8% in 2020[10] – causing discontent that might result in renewed protests.

In Tunisia, political wrangling among political elites and popular disenchantment eventually stalled democratization. The promising transition to consolidated democracy,[11] thus, has endangered the political democratic transformation. Despite

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[8] H. Chougrani, *Morocco Consolidates Its Authoritarianism*, Arab Center Washington DC, August 26, 2021; see also, I. Fakir and I. Werenfels, *In Morocco, Benevolent Authoritarianism Isn't Sustainable*, Commentary, Carnegie Endowment for International Peace (website), July 29, 2020.

[9] "Morocco: Tourism in the Economy", OECD Tourism Trends and Policies 2020, Organisation for Economic Co-operation and Development (website).

[10] B. Alen, "Moroccan Tourism Revenue Dropped by 53.8%", *Tourism Review News* (portal for tourism industry services), February 28, 2021.

[11] The term "democratic consolidation" initially "describe[d] the challenge of making new democracies secure, of extending their life expectancy beyond the short term, of making them immune against the threat of authoritarian regression, of building dams against eventual 'reverse waves'". A. Schedler, "What is Democratic Consolidation?", *Journal of Democracy*, vol. 9, no. 2, 1998, pp. 91-107.

initial optimism in the early days of 2011, Tunisia is now showing signs of a new form of authoritarianism, with corruption and police brutality being commonplace.[12] Intense conflicts between the three main political figures, President Kaïs Saïed, Parliament Speaker Rached Ghannouchi, and Prime Minister Hichem Mechichi, became complicated by a highly fragmented Assembly of the People's Representatives. This squabbling among elites has all but paralyzed political advancement, resulting in rising frustrations among Tunisians. Thus, on June 27, 2021, an initiative for a "Referendum Front" was announced by some political parties, civil society associations, and national public figures to induce the government to organize a national referendum on changes to the country's political and electoral systems.[13] Less than a month later, President Saïed suspended the parliament on July 25, 2021, seizing control of all powers and dismissing the government by activating Article 80 of Tunisia's constitution.[14] Article 80 stipulates that, "in case of imminent danger threatening the national integrity, the security or the independence of the country and hindering the regular functioning of the institutions, the President of the Republic may take the measures required by the state of exception…".[15] While the state of exception was to last for thirty days, on August 24, 2021, Saïed prolonged it indefinitely. In view of the current political and socioeconomic crisis, it would be hazardous to forecast Tunisia transitioning toward a genuine and stable democratic system anytime soon. However, Tunisians have the ability to forge a national consensus that would enable it to move forward.

The uprising in Libya and the ensuing NATO intervention, coupled with dissensions among elites, have left the country

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[12] Z. Boussen, *The Unfinished Revolution: Police Brutality at the Heart of the 10th Anniversary of the Tunisian Revolution*, Arab Reform Initiative, July 13, 2021.

[13] "Tunisians Launch of Referendum Front to Change Political System", *Middle East Monitor*, June 29, 2021.

[14] B. Delmas, "Coup d'État constitutionnel en Tunisie", *Le Point*, July 26, 2021.

[15] "Constitution de la République Tunisienne", Publications de l'Imprimerie Officielle de la République Tunisienne, 2015.

in shambles. Foreign interventions have exacerbated Libyan divisions.[16] After three civil wars (2011, 2014, 2020), a cease-fire agreement was reached in October 2020 and included a demand for all foreign fighters and mercenaries to leave Libya within three months. Though the truce is precarious, there is good potential that it will lead to reconstruction of the country. The cease-fire accord resulted in an agreement on a new transitional government of national unity (GNU) and elections, scheduled for December 24, 2021, a rather overoptimistic or unrealistic project. Despite pressure from the United Nations,[17] foreign forces and mercenaries remain in the country.[18] It is uncertain whether Libyan elites are prepared for a genuinely free election to take place, especially since members of the decision-making Libyan Political Dialogue Forum (LPDF) are divided. Pushing for an election when there is no consensus on the electoral rules, let alone the nature of the political system, might be chimerical at best. Given external geopolitical interests, the prospects for the next decade are not encouraging. Yet, Libya's economic recovery depends largely on political stability. It is thus doubtful whether foreign investors, with the possible exception of China, will be eager to invest in Libya's post-conflict reconstruction amid such political precarity.

Regional Economic Fragility

Since the independence of their respective countries, North African leaders have failed to develop their national economies. Pressed by the Arab uprisings, reform attempts have so far proved insufficient, with limited tangible results. Notably,

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[16] Y.H. Zoubir, "The Protracted Civil War in Libya: The Role of Outside Powers", *Insight Turkey*, vol. 22, no. 4, 2020, pp. 11-27.
[17] "UN Boss: Foreign Fighters Still in Libya in Breach of Ceasefire [*sic*]", *Al Jazeera,* May 15, 2021.
[18] A. Brahimi, "Libya Has a Mercenaries Problem. It's Time for the International Community to Step Up", *Atlantic Council*, May 21, 2021.

youth unemployment – in youth-dominated societies – remains high. Unemployment among university graduates can be worrisome as despair can lead them to join the ranks of jihadist organizations. Therefore, resolving this challenging issue has become a high priority for North African governments, as discussed below. The COVID-19 pandemic has greatly exacerbated unemployment; thus, the governments must find creative solutions (e.g., domestic reforms, integration of the youth in various economic sectors) to avoid more consequential problems.

These economies are largely monolithic, as in many developing countries, and dependent on hydrocarbon resources (Algeria and Libya) or agriculture, phosphate minerals, and tourism (Morocco and Tunisia). Since their respective independence, whether following a liberal or social model, North African economies have failed to create competitive, productive industries. The economic reforms that leaders promised either never happened or remain inadequate. One is hard pressed to identify a development strategy or a vision that could transform them into emerging economies. A Moroccan economist titled a study "Morocco's Development Is Blocked by Corruption, Income, and Human Capital",[19] which reflects the damage that corruption has had on North African economies in general. The author explains how, in addition to theoretical concepts of neopatrimonialism,[20] two other aspects need to be factored in: the distribution of the rent to co-opt clients, and the endemic corruption engendered by the rent.[21] Clearly, this is not unique to Morocco but affects the entire region.

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[19] A. Akesbi, *Le développement au Maroc bloqué par la corruption, la rente, et le capital humain*, Laboratoire Economie du Développement, October 14, 2019.

[20] Neopatrimonialism is defined by Ana Huertas Francisco as "the vertical distribution of resources that gave rise to patron-client networks based around a powerful individual or party…". It is a system in which the postcolonial regimes have "supplanted the role of the inherited colonial institutions for the benefit of a few individuals." See H. Francisco, "Neopatrimonialism in Contemporary African Politics", *E-International Relations*, January 24, 2010.

[21] Akesbi (2019), p. 10.

Prior to the revolts of 2010 and the fall of Ben Ali in Tunisia, Mubarak in Egypt, and Qaddafi in Libya, the region's unemployment rate was 10% overall, but 20% for the youth. In Tunisia, despite seeming economic and political stability at the time, the Ben Ali regime was unable to create new jobs, resulting in a frightening level of 46% unemployment among the youth.[22] Unemployment among those aged 15-24 in 2019 was 35.8% in Tunisia, 22.3% in Morocco, 49.5% in Libya, and 29.7% in Algeria,[23] despite government largesse in the form of easily accessible small business loans that new entrants, i.e., youth, benefited from.

Youth unemployment is not the only challenge. Corruption, lack of accountability, deficient human security, and bad governance remain the root cause for the cyclical protests (Hirak in Morocco and Algeria, strikes and marches in Tunisia, and a precarious cease-fire in Libya). These unresolved issues remain major challenges for the rulers. Importantly, there is a correlation between the emergence of violent extremism and internal socioeconomic conditions, which are impeded and aggravated precisely because of the security conditions.[24] While these governments have been able to control domestic terrorism to a large extent, the propitious conditions for its reemergence are intact, as those governments have been incapable of providing adequate development policies. Thus, ten years on, the economic conditions that led to the Arab uprisings loom over those states. According to a 2020 Arab youth survey, nearly 89% of those aged 18-24 are preoccupied with the issue of work, and only 49% of them trust their government to find a solution

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[22] Wai Mun Hong, "Youth Unemployment in the Southern Mediterranean: Demographic Pressure, Human Development and Policies", in I. Schäfer (ed.), *Youth, Revolt, Recognition: The Young Generation during and after the 'Arab Spring,* Berlin, Mediterranean Institute Berlin, Humboldt University, 2015.

[23] "Unemployment, youth total (% of total labor force ages 15-24) (modeled ILO estimate): Morocco, Algeria, Libya, Tunisia", International Labour Organization data, World Bank, June 15, 2021.

[24] Zoubir (2020).

to their challenge.[25] Consequently, an increasing number of the youth in the region dream of migrating elsewhere.[26] This migration trend is very acute in Tunisia, where doctors, for instance, prefer to migrate rather than remain in their country, which saps the health sector.[27]

This trend is not unique to Tunisia but is present across North Africa. The neighboring Sahel region to the south suffers even more from the political and economic woes that have triggered migration, drug trafficking, social unrest, and terrorism.[28]

Challenges in and from the Sahel

North African nations face security challenges emanating from southern Sahelian neighbors. The Sahel, depicted by a former Algerian prime minister as the corridor of all dangers,[29] was dubbed in a book title as "Sahelistan",[30] though wrongly, considering the differences. The analogy with Afghanistan pertains to a region whose states do not have total control of their respective territories, thus providing a safe haven for foreign fighters (jihadists groups) to train for military battle and international terrorist attacks.[31]

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[25] *A Voice for Change*, Arab Youth Survey, Twelfth Annual Edition, ASDA'A BCW.

[26] S. Mardam Bey, A. Ajoury, C. Hayek, J. Kebbi, and E. Saikali, "I – Dix ans après les printemps arabes, une génération en rupture avec l'ancien monde", *L'Orient-Le Jour*, February 2, 2021.

[27] "'Enterré vivant': en Tunisie, l'exode des médecins fragilise le secteur de la santé", *France 24*, April 1, 2021.

[28] R. Muggah and J. Luengo Cabrera, "The Sahel Is Engulfed by Violence. Climate Change, Food Insecurity and Extremists Are Largely to Blame", article published as part of the World Economic Forum's annual meeting, January 23, 2019. Separately, the Sahel includes parts of northern Senegal, southern Mauritania, central Mali, northern Burkina Faso, the southernmost part of Algeria, Niger, the northernmost region of Nigeria, central Chad, central and southern Sudan, the extreme north of South Sudan, Eritrea, Cameroon, Central African Republic, and the northern reaches of Ethiopia, as noted in Zoubir (2017).

[29] Y.H. Zoubir interview with a former Prime Minister of Algeria, September 2011.

[30] S. Laurent, *Sahelistan: de la Libye au Mali, au cœur du nouveau jihad*, Paris, Seuil, 2013.

[31] Zoubir (2017), p. 134.

In the last two decades, the Sahel has presented a depressing picture. This is a distressing observation because this stretch of about 10 million square kilometers has for centuries been an area of interface between "Arab/Mediterranean Africa" and "Black Africa," and characterized by all kinds of human, economic, and religious interactions.[32] Now, though, drugs and arms have been flowing across the broader Sahelo-Maghreb region; the smuggling worsened after the fall of Qaddafi in 2011, and poses a major threat to regional stability as terrorists have easy access to armaments.[33]

Drug trafficking constitutes a serious menace. While cocaine consumed in Europe travels from Latin America through West Africa and the Sahel region, cannabis comes mainly from Morocco.[34] Northern Mali plays a key role as a passageway for drug trafficking between Africa and Europe through the Maghreb.[35]

Since 2011, terrorist groups such as the Islamic State in the Greater Sahara (ISGS) and other affiliates of the Islamic State of Iraq and al-Sham (ISIS), as well as al-Qaeda in the Islamic Maghreb (AQIM), regularly conduct attacks in Mali, Niger, and Burkina Faso. In June 2021, for instance, ISGS massacred 160 people in Burkina Faso.[36] On July 20, 2021, on the festive day of Eid al-Adha, an assassination attempt targeted Mali's interim president, Assimi Goïta.[37]

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[32] Ibid.

[33] H. Koné, "With Arms Flows from Libya Declining, Military Barracks and Poorly Controlled National Stockpiles Are Being Targeted", *ISS Today*, Institute for Security Studies (website), February 12, 2020.

[34] P. Tinti, "Drug Trafficking in Northern Mali: A Tenuous Criminal Equilibrium", ENACT (a project enhancing Africa's capacity to respond more effectively to transnational organized crime), September 2020.

[35] Ivi, p. 1.

[36] "At Least 132 Civilians Killed in Burkina Faso's Worst Attack in Years", *Reuters*, June 6, 2021.

[37] "Mali's Interim President Goïta Doing 'Very Well' after Assassination Attempt", *France 24*, July 20, 2021.

Migration due to climate change is another factor contributing to conflicts in the Sahel. Environmental conditions, induced by climate change, are affecting rural areas as a heightened frequency of drought, flooding, and erosion threaten agricultural livelihoods and contribute to dislocation.[38] Thus, climate change is a "multiplier of threats," worsening existing tensions in Sahelian societies, especially in those so-called failed states with limited resources.[39] The demographic upward trends intensify those dangers. It is expected that the Sahelian population of the G5 (Burkina Faso, Chad, Mali, Mauritania and Niger) might reach 200 million by mid-2050.[40] (See chapter 5 for an in-depth look at the region's demographic challenges.) No government in the region has the capacity to eradicate poverty or tackle the prevailing inequalities. It is a daunting task to deliver basic services to people in poor areas.[41] Indisputably, the connection between food security and migration plays a role in internal and cross-border movements.[42] This explains why problems in the Sahel, as dangers to international security, have attracted attention in many capitals.[43] Moreover, North Africa's geostrategic position, in between Europe and the Sahel, makes it a battleground for different external players including Turkey,

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[38] "The Sahel: Converging Challenges, Compounding Risks: A Region under High Pressure", United Nations Office for the Coordination of Humanitarian Affairs (information sheet), May 2016, p. 1; and R. Barras Tejudo, "Climate Change and Demographic Trends: Security Challenges in the Sahel", in D. Ghanem-Yazbeck (ed.), *The Sahel: Europe´s African Borders*, EuroMeSCo joint policy study, IEMed, April 2018, pp. 96-120.

[39] N. Safir, "Nouveaux enjeux migratoires régionaux: Nouveau contexte sahélien et perspective (2e partie et fin)", *Le Soir d'Algérie*, April 2, 2017.

[40] Calculated by the authors using data from the Population Reference Bureau's *2020 World Population Data Sheet*.

[41] D. Ghanem-Yazbeck (ed.), *The Sahel: Europe's African Borders*…, cit., p. 11.

[42] A. Knoll, F. Rampa, C. Torres, P.B. Molina, and N. Cascone, *The Nexus between Food and Nutrition Security, and Migration: Clarifying the Debate and Charting a Way Forward*, European Centre for Development Policy Management (ECDPM), discussion paper no. 212, May 2017.

[43] Y.H. Zoubir, "The Sahara-Sahel Quagmire: Regional and International Ramifications", *Mediterranean Politics*, vol. 17, no. 3, 2012, pp. 452-58.

the United Arab Emirates, China, and, inevitably, France. The proactive role of Turkey in Libya and its agreement with the UN-backed government in Tripoli, as well as its rapprochement with Algiers and Rabat, underscore Ankara's ambition to play an influential role in North Africa, both in terms of geopolitics and economic gains.[44]

Responses to Regional Security Issues

The Sahel is of vital importance for the North Africa region, particularly Algeria, which shares borders with Sahelian states. Algeria perceives the Sahel as a highly vulnerable region critical to its own security and stability, as well as to Europe's.[45] It thus seeks to play a key stabilizing role, committed to fighting international terrorism and related activities such as arms and drug trafficking,[46] aiming to keep them outside its territory. Algiers has forged strong security ties with Washington, which sees Algeria as a key contributor to the fight against international terrorism,[47] undertaking 60% of the burden in antiterrorism in the region while Morocco, Mali, Niger, and Mauritania cover the remaining 40%.[48] Algeria also has had a major influence on the issue of counterterrorism within the African Union and through its Peace and Security Department, arguing that the scourge was a shared transnational threat.[49]

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[44] I.N. Telcip, "Turkey's Quest for Influence in the Mediterranean in the Post-Arab Uprisings Era", in R. Mason (ed.), *Transnational Security Cooperation in the Mediterranean*, Cham, Switzerland, Palgrave Macmillan, 2021, p. 173.

[45] A. Abderrahmane, "Understanding Algeria's Foreign Policy in the Sahel," in Y.H. Zoubir (ed.), *The Politics of Algeria*, London, Routledge, 2020, p. 201; and Y.H. Zoubir, "Algeria and the Sahelian Quandary: The Limits of Containment Security Policy," in Ghanem-Yazbeck (2018), pp. 70-95.

[46] Abderrahmane (2020), p. 199.

[47] Zoubir (2018), p. 81.

[48] Ivi, p. 81.

[49] L.T. Shiferaw, *Peace and Security in Africa: Drivers and Implications of North Africa's Southern Gaze*, ECDPM, discussion paper no. 262, October 2019, p. iii.

Though Morocco is not a Sahelian state, it has sought to play a role in the region, backing the G5 Sahel, which was initiated under French leadership following jihadists' attempts to advance to southern Mali. Five Sahelian states – Burkina Faso, Mali, Mauritania, Niger, and Chad – make up the G5, an antiterrorist coalition. The G5 also is tasked with fighting transnational criminal activities in the Sahelian region.[50] Although concerns about the stability and multiplication of armed groups are legitimate, Morocco's backing of the G5 Sahel is driven by political, geostrategic, and economic motivations.[51] Morocco's involvement in the Sahel has been described as economic diplomacy aimed at swaying some sub-Saharan African states to support Morocco's sovereignty over Western Sahara and its annexation by the kingdom.[52] Rabat retains its ambition to become a regional economic hegemon,[53] a policy it pursued rather successfully amid paralysis of Algeria's foreign policy during the last decade of rule by the ailing Bouteflika, given it was his reserved domain. Morocco astutely exploited Algeria's neglect of sub-Saharan Africa, long a sphere of its influence. Although Morocco had left the Organization of the African Union in 1984, it joined the African Union in January 2017. One of the objectives was to offset Algeria's influential role in the organization and thus undermine Algeria's support for the Saharawi cause, which numerous African states support. Weary of Algeria and Spain's policies, Morocco saw alignment with francophone Africa, which is dependent on France, its main ally, as an absolute necessity.[54] As a result, Rabat pursued its international policy with the intertwined objectives of positioning itself both as Europe's entryway to sub-Saharan Africa and as a continental economic power. In doing so, Rabat aims to further strengthen its grip on the Western Sahara.[55]

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[50] Ivi, pp. 13-14.

[51] Ibid.

[52] Ivi p. 9.

[53] Ibid.

[54] Ibid.

[55] M. Bishku, "Morocco and Sub-Saharan Africa: In the Shadow of the Western

Migration threats

Sub-Saharan migration is perceived as a political, economic, and security threat by both European and North African states. European leaders see the arrival of migrants as a political menace because of the internal upsurge of right-wing populism. They also find the influx difficult to justify to their electorates in a period when Europe itself is confronted with challenging economic conditions.[56] Meanwhile, for the North African states, the arrival of sub-Saharan migrants also is problematic, creating an additional burden and greater financial challenges amid their already dire economic situation.[57]

Migration to Europe from and through North Africa is not new. The North African states have traditionally been countries of migration; since the early 2000s, however, they have become countries of transit and final destination for sub-Sahara Africans.[58] The current volatile situation in the Sahel has aggravated economic conditions and hindered any sense of improved job and life prospects, which are factors influencing migration flows to North African countries and, in turn, to Europe.[59] This migration has long been an issue of contention between European and North African states. However, Europeans have sought to partner with "key third countries of origin and transit" and to initiate further agreements, the so-called compacts with Sahel states such as Niger, Nigeria, Senegal, Mali, and Ethiopia.[60] One of the major consequences of this reorganization of persons' mobility in Europe is the unleashing of irregular migration

Sahara Dispute," *Contemporary Review of the Middle East*, vol. 8, 2021, pp. 273-89.

[56] Zoubir (2017), p. 137.

[57] Ibid.

[58] H. Boubakri et al., *Migration in North Africa between sub-Saharan Africa and Europe*, Konrad Adenauer Stiftung, Regional Program Political Dialogue South Mediterranean, Policy Paper, 4, 2021.

[59] Ivi, p. 9.

[60] Zoubir (2017), p. 137.

toward the Continent, precisely from these third countries.[61]

In periods of tension, Southern Mediterranean states can use migration as leverage in their relations with Europe. On different occasions, when tension mounted between Ankara and Brussels, Turkey's Recep Tayyip Erdoğan brandished the threat of opening his country's borders to let Syrian migrants to pour into Europe. State authorities and security forces may sometimes be complacent when facing illegal migration, by turning a blind eye, accepting bribes by would-be migrants, and even providing these migrants with forged passports.[62]

More recently, Morocco used this type of migration blackmail with Spain. In May 2021, Rabat opened its borders between Tangiers and the Spanish enclave of Ceuta, allowing eight thousand Moroccans including many underage youths, to enter the enclave, taking Spanish forces by surprise. This diplomatic incident led to real tension between Rabat and Madrid, with Morocco even recalling its ambassador to Spain for consultation.[63] This diplomatic rift highlights lingering migration and other issues. EU financial incentives to Morocco – such as a €140 million border-control cooperation program between Morocco and the EU[64] – do not constitute a guarantee that Rabat will hew to the line.

Rabat's opening of its borders also indicates it can conceal serious internal socioeconomic conditions for political purposes, and that the government was aware that "Spain could not easily return the numerous minors to Morocco".[65] This approach had

[61] Boubakri et al. (2021), p. 6.

[62] F. Molenaar and T. Van Damme, *Irregular Migration and Human Smuggling Networks in Mali*, Netherlands Institute of International Relations "Clingendael," Conflict Research Unit (CRU) Report, February 2017.

[63] "Le Maroc rappelle son ambassadrice en Espagne pour consultation", *L'Orient-Le Jour*, May 18, 2021.

[64] A. Niemann and J. Blöser, "Migration and the Mediterranean: The EU's Response to the European Refugee Crisis", in R. Mason (ed.), *Transnational Security Cooperation in the Mediterranean*, Cham, Switzerland, Palgrave Macmillan, 2021, p. 95.

[65] J.I. Torreblanca, *This Time Is Different: Spain, Morocco, and Weaponized Migration*,

been taken earlier, in 1975, when King Hassan II mobilized the "Green March" of three hundred and fifty thousand soldiers and civilians to occupy Western Sahara.[66] Such a strategy is part of the "connectivity wars," whereby the interdependence created by globalization is used as a weapon of war rather than for prosperity.[67] For the influential *Le Monde*, the 2021 incident in Ceuta revealed "the real nature of the Moroccan regime," and signals it is time for the EU to shed its diplomatic naivete about Morocco.[68] If Morocco ignores diplomatic rules and resorts to such blackmail of Spain, the thinking goes, Rabat could someday resort to similar tactics toward the EU overall: if the migration gates are opened for adults seeking to enter Europe, terrorists could potentially infiltrate their ranks.[69] Additionally, this incident indicates that the Moroccan government can use migration to put pressure on Spain regarding its stance on Western Sahara. Rabat's move has been interpreted as a way to force Spain to join the United States and France "in acquiescing to a solution to the Western Sahara conflict that involves integrating the territory into Morocco,"[70] while other European countries including Germany adhere to international legality and do not support Morocco's claims to Western Sahara.[71]

As a clear sign of the difficult bilateral relations between Morocco and Spain, Madrid decided to withdraw from its planned participation in the annual African Lion military

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European Council on Foreign Relations (ECFR), European Power program, May 26, 2021.

[66] Ibid.

[67] U. Franke and M. Leonard, *Connectivity Wars*, European Council on Foreign Relations (ECFR), January 20, 2016.

[68] "Crise des migrants à Ceuta: Il est temps de sortir d'une certaine naïveté dans le regard porté sur le Maroc", *Le Monde*, May 21, 2021.

[69] K. Götsch, "Alleged Terrorists, Refugees, and Radicalized Muslims in Europe: A Wicked Discursive Conjunction", *Sicherheit und Frieden (S+F)/Security and Peace*, vol. 34, no. 1, Themenschwerpunkt: Migration, Sicherheit und Frieden/ Migration, Security and Peace, 2016, pp. 38-45.

[70] Torreblanca (2021).

[71] Ibid.

maneuvers scheduled to take place in Morocco, Tunisia, and Senegal in June 2021. Since part of these maneuvers could have been held in Western Sahara (as Morocco alleged), Spain refused to give any legitimacy to Morocco's claim to this occupied territory.[72]

The nonresolution of the Western Sahara and regional repercussions

President Donald Trump's decision, shortly after his electoral defeat in December 2020, to recognize Morocco's sovereignty over Western Sahara has upset the regional balance of power, increasing the risk of confrontation between Algeria, which supports the Sahrawi claims, and Morocco. Trump's surprising decision has increased Morocco's determination to undermine Algeria's policies, and Algeria's to curb Morocco's influence over Western Sahara and among some sub-Saharan African countries supportive of Morocco.[73] Trump's decision and President Joe Biden's reluctance to rescind it have inevitably exacerbated already tense Algerian-Moroccan relations. Algeria has, for instance, nudged Mauritania to minimize its diplomatic relations with Morocco and, in April 2021, signed a strategic memorandum of understanding to strengthen Algerian-Mauritanian economic and security cooperation.[74] Although the question of Western Sahara is not the only source of contention between Algeria and Morocco,[75] it was one of the contributing factors in Algeria's August 24 decision to break

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[72] M. González, "España rehúsa participar en unas maniobras de EE UU para no legitimar la ocupación del Sáhara", *El Pais*, May 29, 2021.

[73] A. Chahir, "Morocco: The 'Deal of the Century' and the Misfortunes of Mohammed VI", Opinion, *Middle East Eye*, June 13, 2021.

[74] Ibid.

[75] Y.H. Zoubir, "The Algerian-Moroccan Rivalry: Constructing the Imaginary Enemy", in I. Mansour and W. Thompson (eds.), *Shocks and Rivalries in the Middle East and North Africa*, Washington, DC, Georgetown University Press, 2020, pp. 179-200.

diplomatic relations with Morocco.[76] Furthermore, Morocco's current tense relations with Spain and recent suspension of contact with the German embassy in Rabat over "deep misunderstandings" related to Western Sahara may reduce Rabat's space to maneuver on its Western Saharan claims with them and other countries that support UN resolutions and Sahrawis' right to self-determination.[77]

COVID-19 and Its Economic Impact on North Africa

The COVID-19 pandemic has greatly impacted the region, and while it is too early to assess the long-term effects, the economic impact is felt and will be for years to come.[78] The pandemic death toll has not reached the peaks seen in countries such as Italy, France, or Brazil, but the pandemic's socioeconomic consequences are significant in North Africa.

In Algeria, shortages of basic food commodities such as cooking oil and pasta have prompted people to queue for food, "a phenomenon that has not been seen in fifty years".[79] Prices have risen for most other foods, such as potatoes and tomatoes.[80] Together with the oil price slump, which began in 2014, and the ongoing political crisis in Algeria, the pandemic has further exposed the economic fragility of this rentier state, whose budget depends almost exclusively on oil revenues.

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[76] "Algeria Breaks Off Diplomatic Ties with Neighboring Morocco", Associated Press, August 24, 2021.

[77] M. Bachir, "Crise Berlin-Rabat: Pourquoi l'Allemagne irrite tant le Maroc", *Middle East Eye*, March 2, 2021.

[78] R. Mason, "Rethinking the EU Approach", in R. Mason (ed.), *Transnational Security Cooperation in the Mediterranean*, Cham, Switzerland, Palgrave Macmillan, 2021, p. 255.

[79] G.D. Porter, *Algeria's Economic Challenges: Opportunities for US Engagement*, Policy Analysis, PolicyWatch 3493, Washington Institute for Near East Policy, May 28, 2021.

[80] Ibid.

The COVID-19 pandemic enabled the authorities to crack down on the Hirak,[81] without exerting violence. Meanwhile, the government had done very little to overcome the economic crisis since March 2020, when COVID-19 was declared a global pandemic. Prime Minister Aïmene Benabderrahmane, a technocrat with finance experience who was appointed in June 2021,[82] is entrusted with redressing the economy and focusing on social stability, a daunting task. Faced with these multiple challenges, the authorities have been forced to review their economic development strategy. Successive Algerian governments had for years failed to bring about the required reforms to reduce dependency on hydrocarbon revenues, expand economic activities, bolster private initiatives, and address the high levels of unemployment, particularly among young segments of the population, which have experienced a worsening of conditions during waves of the coronavirus, the latest in July and August 2021. Earlier, the government's financial burdens had deepened as oil prices fell; unsurprisingly, the COVID-19 pandemic has aggravated the multifaceted disparities and fiascos that emerged under Bouteflika's rule. Indeed, the pandemic has exposed the many failures of a regime that did not invest enough in human security.

In July 2021, the Algerian government, which first requested to join the General Agreement on Tariffs and Trade in 1987, announced the resumption of the process of dialogue and negotiations for its accession to the World Trade Organization (WTO). For years, Algerian authorities had expressed reservations about the conditions of access.[83] However, the COVID-19 crisis and its impact on the national economy have further underlined the weakness of the Algerian economy,

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[81] Y.H. Zoubir and A.L. Jacobs, *Will COVID-19 Reshape Algeria's Political System?*, Brookings Institution, May 10, 2020.

[82] H. Saleck, "Nouveau premier ministre en Algérie: Face aux menaces extérieures, Tebboune cherche l'unité 'à l'intérieur du pays'", *Sputnik news agency*, July 1, 2021.

[83] S. Rabia, "Commerce multilatéral: L'Algérie reprend son long chemin vers l'OMC", *El Watan*, June 19, 2021.

which is largely based on imports. Such a foreign dependency remains a major handicap for Algeria, whose ambition is to be financially and economically self-reliant. Having made regular announcements about the need to reduce this dependency,[84] Algeria may now be motivated to join the WTO and embark on genuine reforms. In fact, it has begun to show more pragmatism in terms of trade and foreign direct investment (FDI). There seems to be political will to revise the country's economic approach.[85]

Authorities at the highest level realize that dependency on hydrocarbon revenues is an unsustainable policy. As a recent Institute for Security Studies report has shown,[86] Algeria has the human and material resources to generate a real takeoff, which also requires political will. Algeria hopes that the virtual elimination of the 51/49% rule, which required 51% of all ventures be held by Algerian nationals (and which still applies to strategic sectors), will attract foreign direct investment, as President Abdelmadjid Tebboune has insisted that Algeria will not resort to borrowing from international financial institutions such as the International Monetary Fund or the World Bank.

The COVID-19 pandemic may have opened new windows of opportunity in North-South cooperation, especially in the healthcare sector. For instance, closer cooperation to fight COVID-19 and other potential diseases might take place between the EU and North African states by improving public health clinical capacity building.[87] In this respect, both Morocco and Algeria have partnered with China and Russia to produce Sinopharm and Sputnik V, respectively; these vaccines will be

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[84] Y. Bourdillon, "L'Algérie multiplie les efforts pour diversifier son économie", *Les Echos*, July 16, 2018 ; and A. Sanz, "L'Algérie mise sur la vente de participations pour diversifier son économie", *Atalayar*, August 9, 2021.

[85] *Algeria Resumes Dialogue with WTO*, Algeria British Business Council (ABBC) website, July 22, 2021.

[86] S. Kwasi and J. Cilliers, *Stagnation or Growth? Algeria's Development Pathway to 2040*, Institute for Security Studies, March 31, 2021.

[87] Mason (2021), p. 256.

made locally.[88] One can surmise that even if the EU has taken a security approach in its relations with North African states to date, the approach may now expand to earnest cooperation. For instance, "health-related euros will help prevent infections back in the EU".[89]

Conclusion

North African populations are becoming increasingly exasperated with their governments. It is therefore vital that these governments initiate credible short- and long-term reforms. They also need to address citizens' lack of trust in their leaders.[90] Consequently, a new social contract is urgently required. European neighbors have a role to play. The EU's security approach to North Africa must be balanced with strong economic partnerships, prerequisites for lasting stability. The EU's interaction with North Africa and the Sahel has, however, been largely based on a military and security viewpoint, rather than one of promoting effective economic development. While terrorism, migration, and transnational trafficking (drugs, weapons, etc.)[91] are justified concerns, they cannot be remedied without addressing their socioeconomic root causes.

Unquestionably, the region is facing new challenges (ranging from an increased number of refugees and the socioeconomic impact of COVID-19 to climate change), and North African states must adapt and devise realistic development approaches through effective reforms. The states can exploit the competition among external states interested in the region such as Turkey,

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[88] "COVID-19: Le Maroc annonce un projet de fabrication locale du vaccin Sinopharm", *Le Figaro*, July 5, 2021; and "Production du vaccin Spoutnik V: Saidal débutera les formations prochainement", *Algérie Presse Service*, April 14, 2021.

[89] Mason (2021), p. 244.

[90] A. Abderrahmane, *Algeria's Parliamentary Elections: A Bumpy Road Ahead*, Atlantic Council, June 3, 2021.

[91] Mason (2021), p. 244.

China, Qatar, Russia, the United States, and the traditional European actors to engage in beneficial cooperation. Though the long-lasting Libyan crisis poses a security threat to the region, peace could produce dividends for Libya and the region as a whole.

Yet the ongoing instability in the Sahel and the recognition by Washington of Morocco's sovereignty over Western Sahara are two factors that are likely to further destabilize the entire Sahelo-Maghreb region, representing serious security risks for North Africa and its immediate northern European neighborhood. The resolution of the conflict in Western Sahara is an exigency to avoid a disastrous escalation that would inevitably involve foreign powers. Morocco's confidence that its normalization with Israel has empowered it and given it the upper hand against Algeria is a misguided calculation. Domestically, the normalization might already have alienated Moroccans, most of whom are attached to the Palestinian cause. Regionally, it has widened the rift with Algeria, which could adopt a radical position toward Morocco,[92] as foreshadowed by the break in diplomatic relations. Algeria's decision not to renew the gas contract with Morocco, which expires on October 31, 2021, is a case in point.[93] The two developments put an end to any short-term prospects for a revival of the Arab Maghreb Union, which has hardly been functioning since 1996.

Regional integration remains part of the wider solution to the economic development of the region. Unfortunately, a mere

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[92] A. Charef, "Pour l'Algérie, une offensive Israélienne se profile derrière la menace Marocaine", *Middle East Eye*, July 25, 2021.

[93] The Maghreb-Europe Gas (GME) pipeline became operational in 1996. It runs from the Hassi R'Mel field in Algeria through Morocco to Spain, where it connects with the Spanish and Portuguese gas networks. Morocco receives 80,000 cubic meters of gas as well as US$35 million for this right of passage. Algeria will now ship gas to Spain and Portugal directly from Algerian territory, under the Mediterranean Sea, though the MEDGAZ pipeline. Ediallo, "Brouille Algérie-Maroc: un défi pour l'approvisionnement gazier au Maroc", *Africa Logistics Magazine*, Septembre 5, 2021.

4% of trade now occurs within North Africa,[94] and the level will certainly drop in the coming years because of intraregional tensions. The involvement of foreign powers in the region and the formation of alliances could result in Algeria ending its own long-standing nonalignment to engage in open alliances with Russia and China. This scenario would transform the North African region (as already seen in Libya) into a fighting ground between Morocco's Western and Gulf patrons and the US and EU's strategic rivals. Short of addressing geopolitical and economic issues rationally, North Africa and Europe will inevitably face unpredictable consequences.

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[94] Kwasi and Cilliers (2021), p. 22.

2. Governance in North Africa: Taking Stock for Future Change

Guillaume Biganzoli, Pietro Gagliardi

Much attention is being given to public governance in North Africa and the broader Middle East and North Africa (MENA) region.[1] In a recent strategic foresight exercise organized by the Italian Institute for International Political Studies (ISPI), involving twenty-five experts from nineteen different think tanks from the northern and southern shores of the broader Mediterranean region,[2] governance reforms were identified as the most influential policy area to sustain inclusive growth in the region.

In recent history, the MENA region has been the particular focus for ideas about the modern social contract,[3] which is defined as the agreement between the state and its citizens whereby the latter accept the rule of the former in return for certain rights and privileges. The Arab uprisings of 2010-11, often referred to

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[1] R.P. Beschel Jr. and T.M. Yousef, *Public Sector Reform in MENA: The Achievable Governance Revolution*, Op-Ed, Brookings Institution, May 5, 2021. This paper focuses on North Africa, namely Algeria, Egypt, Libya, Morocco, and Tunisia, although it also refers to developments in the broader Middle East and North Africa (MENA) region.

[2] L. Demichele et al., "What Is In Store for the MENA Region in 2021 and Beyond?," Institute for International Political Studies (ISPI), March 31, 2021.

[3] M. Loewe, T. Zintl, and A. Houdret, "The Social Contract as a Tool of Analysis: Introduction to the Special Issue on 'Framing the Evolution of New Social Contracts in Middle Eastern and North African Countries'", *World Development*, vol. 145, 2021.

as the Arab Spring, are widely understood as the result of the breakdown of the social contract due to governments' failure to deliver on the political, social, and economic rights and needs of its citizens.[4] This has led to a redefining of the Arab social contract or state-citizen relationship, and it has highlighted the necessity of effective public governance at its core.[5]

Difficulties emerge in defining governance, and good governance in particular.[6] There is "no clearly agreed definition of governance today" in the academic literature and policy field, Francis Fukuyama notes.[7] In Arabic, the very translation of the word is a challenge and ranges from *al-hakimia* (الحاكمية) to *al-hawkama* (الحَوْكَمة) and *al-hikama* (الحكامة).

Yet governance remains a useful concept, if properly defined in substance and scope. This paper starts from Fukuyama's definition of [good] governance as the "government's ability to [effectively and efficiently] make and enforce rules, and deliver services".[8] To overcome some of its conceptual issues, this paper focuses solely on public governance (as opposed to economic, regional, etc.), i.e., on the state-citizen interface, looking at the supply, or public sector-led, side and the demand, or citizen-led, side of governance, as Daniel Kaufmann put it.[9]

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[4] S. Devarajan and E. Ianchovichina, "A Broken Social Contract, Not High Inequality, Led to the Arab Spring"," *Review of Income and Health*, 2017.

[5] A. El Haddad, "Redefining the Social Contract in the Wake of the Arab Spring: The Experiences of Egypt, Morocco and Tunisia", *World Development*, vol. 127, 2020); and H. Larbi, *Rewriting the Arab Social Contract: Toward Inclusive Development and Politics in the Arab World*, Belfer Centre for Science and International Affairs, Harvard Kennedy School, May 2016.

[6] C. Offe, "Governance: an 'Empty Signifier?'", *Constellations*, vol. 16, 2009, pp. 550-62.

[7] F. Fukuyama, "Governance: What Do We Know, and How Do We Know It?", *The Annual Review of Political Science*, vol. 19, 2016, pp. 89-105.

[8] F. Fukuyama, *What Is Governance?*, Working Paper 314, Center for Global Development, January 2013.

[9] D. Kaufmann, *Governance and the Arab World in Transition: Reflections, Empirics and Implications for the International Community*, Brookings Institution, 2011.

Good governance is a necessary precondition for a functioning public administration that delivers quality goods and services to all citizens and businesses.[10] Over the past decade, from the aftermath of the 2008 financial crisis to the COVID-19 pandemic, governments worldwide have faced a multiplication of increasingly global, multidimensional, and interconnected challenges. The COVID-19 crisis has underlined how citizens and businesses rely on governments in an existential way when faced by a collective threat. Responding to such crises at the national level requires an efficient, coordinated, and crosscutting approach. Yet low levels of trust in public institutions, growing fiscal constraints, and the looming issues of climate change and rising inequalities, curtail public administrations' ability to effectively deal with these problems. This situation is compounded by long-standing governance problems in North Africa, such as corruption, inefficient spending, and administrative red tape, as well as the inadequacy of government structure, institutions, and tools. In fact, failing public governance may lead to greater financial burdens and inequalities,[11] further undermining citizens' trust.

Ten years after the Arab uprisings, North Africa (and the MENA region more broadly) is one of few places in the world that has lost ground in terms of good governance, according to most indicators.[12] In this chapter, indicators are used as a starting point for a deeper assessment of the state of governance in North Africa today, acknowledging the oft-positivist and normative limits of such markers, colored by predominant and Eurocentric understandings of governance.[13] Instead, the literature has highlighted the existence of diverse forms of

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[10] Organisation for Economic Co-operation and Development (OECD), *Policy Framework on Sound Public Governance: Baseline Features of Governments That Work Well"*, Paris, OECD Publishing, 2020.

[11] Organisation for Economic Co-operation and Development (OECD), *The Governance of Inclusive Growth*, Paris, OECD Publishing, May 31, 2016.

[12] Beschel Jr. and Yousef (2021).

[13] Fukuyama (2016).

governance, including "governance without government",[14] of which Libya might be the most emblematic example. This paper hopes to capture this more nuanced approach through an analysis of the supply and demand sides of governance.

North African public sectors can be analyzed through the same lens as those of the rest of the world.[15] At the same time, from conflict-torn Libya to democratizing Tunisia, diversity within the region is stark in terms of governance structures as well as history, politics, and socioeconomic dynamics. Therefore, this short stocktaking paper cannot give proper justice to the complexity and pluralistic reality of the region.

This chapter provides first an assessment of North African public administrations' performance in service of their citizens today compared to pre-2011. It then explores the relationship between North African citizens and civil society on the one hand and public institutions on the other. The paper finally draws some conclusions as to the future of pubic governance and the social contract in North Africa, ten years after the Arab uprisings.

Supply Side: Public Administration Performance

The supply-side of governance looks at public administration's ability to effectively and efficiently deliver services to its citizens. The Worldwide Governance Indicators (WGI) data set summarizes responses in enterprise, citizen, and expert surveys conducted by numerous organizations in industrial and developing countries on six broad dimensions of governance including government effectiveness, regulatory quality, rule of

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[14] R.A.W. Rhodes, "The New Governance: Governing without Government", *Political Studies*, vol. 44, 1996, pp. 652-67.
[15] R.M. Schomaker and M.W. Bauer, "Public Governance in the MENA Region: Reform Trends and Patterns", *International Journal of Public Administration*, vol. 43, 2020, pp. 378-91, doi:10.1080/01900692.2019.1669179.

law, and control of corruption.[16] While the WGI have drawn criticism from a methodological and normative point of view,[17] they can help provide a first overview of public governance developments in North Africa. As TTable 2.1 shows, the overall trend for North Africa is negative: in all but three instances, each country's situation across these four indicators has worsened between 2010 and 2019. The most notable deterioration can be observed in Libya, where protracted conflict and worsening instability have exacerbated already dismal governance measures, especially in regulatory quality (by 23 percentage points, or pp), rule of law (by 17 pp), and government effectiveness (by 16.5 pp). The data set seems to confirm the lack of substantive progress made to achieve good governance in North Africa ten years on.

Table 2.1 - Key governance indicators across North Africa, 2010-2019

Performance Ranges from Approximately -2.5 (weak) to 2.5 (strong) Governance					
	Algeria	**Egypt**	**Morocco**	**Tunisia**	**Libya**
Government Effectiveness Index (2010)	-0.48	-0.37	-0.10	0.22	-1.92
Government Effectiveness Index (2019)	-0.52	-0.42	-0.12	-0.10	-1.10
Government Effectiveness Evolution (2010-2019)	-0.04	-0.05	-0.02	-0.32	-0.82

[16] D. Kaufmann *et al.*, "World Governance Indicators", Research Data Set, World Bank, 2019.

[17] L. Langbein and S. Knack, "The Worldwide Governance Indicators: Six, One, or None?", *Journal of Development Studies* vol. 46, 2010, pp. 350-70, doi:10.1080/00220380902952399; M. Thomas, "What Do the Worldwide Governance Indicators Measure?", *The European Journal of Development Research*, vol. 22, 2009, pp. 31-54, doi:10.1057/EJDR.2009.32; and C. Arndt, "The Politics of Governance Ratings", *International Public Management Journal*, vol. 11, 2008, pp. 275-97, doi:10.1080/10967490802301278.

Regulatory Quality Index (2010)	-1.17	-0.17	-0.08	-0.03	-1.19
Regulatory Quality Index (2019)	-1.30	-0.83	-0.21	-0.44	-2.35
Regulatory Quality Evolution (2010-2019)	-0.13	-0.65	-0.13	-0.41	-1.16
Rule of Law Index (2010)	-0.78	-0.18	-0.17	0.06	-0.99
Rule of Law Index (2019)	-0.82	-0.42	-0.14	0.06	-1.85
Rule of Law Evolution (2010-2019)	-0.03	-0.24	0.04	0.00	-0.85
Control of Corruption Index (2010)	-0.52	-0.63	-0.20	-0.26	-1.29
Control of Corruption Index (2019)	-0.62	-0.67	-0.28	-0.08	-1.60
Control of Corruption Evolution (2010-2019)	-0.10	-0.04	-0.07	0.18	-0.32

Note: As defined by the World Bank, the dimension on "Governance Effectiveness" reflects "perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government's commitment to such policies." The dimension on "Regulatory Quality" reflects "perceptions of the ability of the government to formulate and implement sound policies and regulations that permit and promote private sector development." The dimension on "Rule of Law" reflects "perceptions of the extent to which agents have confidence in and abide by the rules of society, and in particular the quality of contract enforcement, property rights, the police, and the courts, as well as the likelihood of crime and violence." The dimension on "Control of Corruption" reflects "perceptions of the extent to which public power is exorcized for private gain, including both petty and grand forms of corruption, as well as 'capture' of the state by elites and private interests."

*Source*: D. Kaufmann et al., "World Governance Indicators", Research Data Set, World Bank, 2019.

Governance failures are illustrated by low levels of citizens' overall satisfaction with government performance, which experienced an important drop in the aftermath of the 2010-11 Arab uprisings, with the exception of Algeria. Data from the Arab Barometer highlight that public discontent continues to

be rampant in the region, with only 25% of citizens expressing satisfaction with their government in 2019. The health sector offers a telling comparison: 28.4% of North Africans (on average) and 70% of citizens in member countries of the Organisation for Economic Co-operation and Development (OECD) expressed satisfaction with their healthcare services (Figure 2.1). Early findings suggest that this level has further decreased amid the COVID-19 crisis in North Africa and the Middle East more generally.[18]

Fig. 2.1 - General satisfaction with the healthcare system in North Africa and OECD

Percent responding completely satisfied or satisfied in 2018-19 Arab Barometer
Percent responding satisfied per 2018 OECD data based on Gallup World Poll
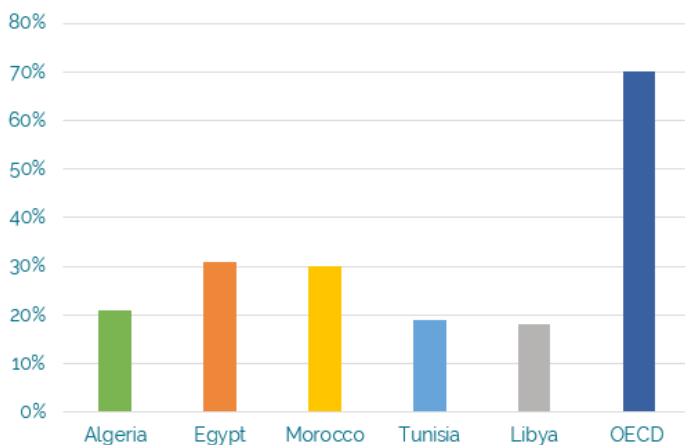
Note: The Arab Barometer polled residents of Algeria, Egypt, Morocco, Tunisia, and Libya in 2018 and 2019. The OECD calculated the simple average for its thirty-eight member countries based on a similar survey conducted by the Gallup World Poll. Both were published in 2019.

Sources: Arab Barometer, 2019; OECD, 2019.

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[18] S. Al-Shami, "Citizens Weigh in on the Health of Their Healthcare Systems in MENA", Arab Barometer, April 7, 2021.

Looking at the region's current trends in government efficiency, integrity, and accountability – three cornerstones of good public governance – this section hopes to shed light on the underlying developments behind the dismaying assessment of macro-level indicators.

Big governments prevail

For decades, the public sector in the Arab world, including in North Africa, has been the first national employer, offering jobs to recent graduates, with greater job security, social benefits, and pay than in the private sector.[19] The appeal of the public sector has not waned over the years. An increasingly young and educated population continues to consider public-sector employment as a right and one of the core tenants of the Arab social contract.[20] Unsurprisingly, in the immediate aftermath of the 2010-2011 demonstrations, several North African countries resorted to massive hiring drives in the public sector as a one-off solution to citizens' demands for "Work, Freedom, and Dignity" (شغل، حرية، كرامة). Egypt and Algeria notably created two hundred thousand public-sector jobs each between 2011 and 2012.[21]

This hiring spurt was short-lived. Public reforms have become a sine qua non for North African countries' access to internationally backed multiyear loans. In Tunisia, this included public-sector hiring freezes, subsidy reductions, and pension reforms, a source of grievance for Tunisians and the influential Tunisian General Labor Union (UGTT). North Africa's dependency on foreign aid has also led to a shrinking of the public sector.[22]

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[19] R. Assad and G. Barsoum, "Public Employment in the Middle East and North Africa: Does a Changing Public Sector Workforce in the MENA Region Provide an Opportunity for Restructuring?", *IZA World of Labor*, vol. 463, August 2019.
[20] N. Kabbani, "Economic Dimensions of the Social Contract and How to Address Them", in Y. Cherif (ed.), *The Modern Arab State: A Decade of Uprisings in the Middle East and North Africa*, Berlin, Konrad-Adenauer-Stiftung, 2021.
[21] Assad and Barsoum (2019).
[22] Ö. Tür, "Political Economy of the Arab States: Wither Any Change?", in Y.

Nevertheless, the public sector in North Africa remains one of the world's largest. Because civil servants cannot simply be let go, they must be offered incentives for early retirement, an option that has not proven to be appealing to many public officials. As a result, public jobs still represented between 22% and 37% of total employment in Algeria, Egypt, and Tunisia in the late 2010s,[23] compared to 18% in OECD countries in 2015.[24] A bloated public sector also continues to put tremendous pressure on public financial resources, with one-third of total public expenditures in 2018 going to paying civil servants' salaries (Figure 2.2).

Overextended public sectors have limited the diversification of the region's economies, especially in Algeria given its continued reliance on oil and gas resources. In addition, this overextension has dissuaded the development of relevant skills to make workers more competitive in the job market, and stifled innovation by driving young talent away from the private sector. Finally, large bureaucracies have constrained attempts to engage in consequential public-sector reforms in the region.[25]

The COVID-19 pandemic has tested the resilience of public sectors and the adequacy of current public-employment management systems. North African governments have nevertheless demonstrated a surprising level of flexibility to facilitate teleworking and the remote delivery of services during the crisis.[26] This capacity is a clear indication that a deep reform of public sectors in the region, promoting innovative and adaptive responses to rapidly changing societal needs and realities, is not only possible but achievable.

Cherif (ed.), *The Modern Arab State: A Decade of Uprisings in the Middle East and North Africa*, Berlin, Konrad-Adenauer-Stiftung, 2021, pp. 93-116.

[23] "Employment Statistics: Employment by Sex and Institutional Sector (thousands)", International Labour Organization's ILOSTAT, November, 2020.

[24] Organisation for Economic Co-operation and Development (OECD), "Government at a Glance 2017", OECD, July 13, 2017.

[25] Tür (2021).

[26] Organisation for Economic Co-operation and Development (OECD), "OECD Policy Responses to Coronavirus: COVID-19 Crisis Response in MENA Countries", OECD, Updated November 6, 2020.

Fig. 2.2 - Wage bill as a percentage of public expenditure, 2018

The red line indicates the average wage bill as a percentage of public expenditure across North Africa
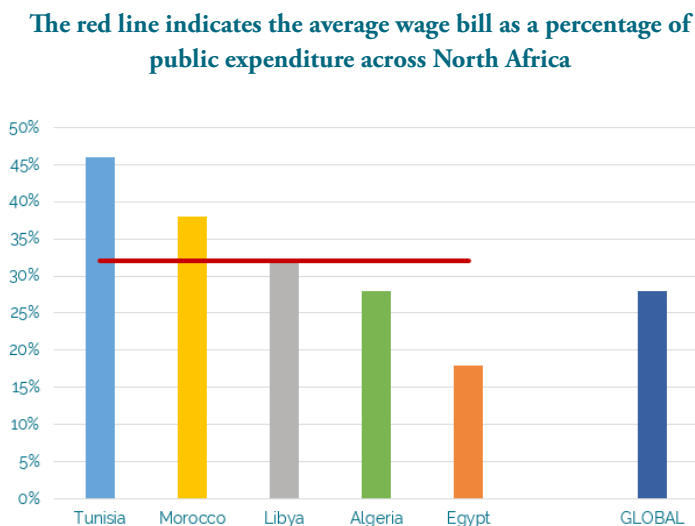
Source: World Bank, *Worldwide Bureaucracy Indicators Dashboard*, 2021

Policies and services lack quality and efficiency

Overregulation creates burdens and inefficiencies within the public and private sectors. This is where regulatory policy comes in. It serves to evaluate the quality of regulations, with the aim of improving the prospect of legislation and regulation delivering the best possible outcome for citizens and businesses.[27]

Undertaking regulatory reform in countries that inherited sprawling public administrations from the colonial period, with complex regulations, has, however, been difficult. Egypt is a case in point, with close to 120,000 laws and 36,000 regulations. Such a level of regulatory complexity is a real obstacle for

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[27] Organisation for Economic Co-operation and Development (OECD), *Regulatory Reform in the Middle East and North Africa: Implementing Regulatory Policy Principles to Foster Inclusive Growth*, Paris, OECD Publishing, November 12, 2016.

citizens trying to access critical services and businesses in their day-to-day affairs. Yet, some attempts at regulatory reform have been made. The Egyptian Regulatory Reform and Development Activity (ERRADA) initiative, created in 2008, has engaged in a large-scale regulatory simplification with the removal of two thousand contradictory or redundant instruments and the online publication of thirty thousand legislative texts.[28]

Governments in the region struggle to produce quality policies due to a lack of a clear and coordinated or whole-of-government approach in their formulation, implementation, monitoring, and enforcement. The Arab uprisings and the subsequent political upheavals have led to a reconfiguration of institutional structures and created a vacuum in leadership, two essential conditions for effective regulatory reform.[29] The highly centralized nature of most administrations in the region also hampers the effective enforcement of policies across all levels of government. Local administrations are providers of key public services such as education, healthcare, and transportation, and citizens report higher confidence toward them than their national governments.[30] Yet local authorities often lack the appropriate resources and mandate to translate national priorities on the ground and provide the appropriate level of service.

Since 2011, Tunisia and Morocco have made considerable efforts to enhance both the mandate and resources of local authorities through the processes of *régionalisation avancée* (advanced regionalization) in Morocco's 2011 constitution and *décentralisation* (decentralization) in Tunisia's 2018 *Code des Collectivités Locales*, which enabled the country's first free and

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[28] Organisation for Economic Co-operation and Development (OECD), *Compact for Economic Governance: Stocktaking Report: Egypt*, supervised by Anton Leis Garcia, OECD in Collaboration with the Deauville Partnership, n.d.; and OECD, *Regulatory Reform in the Middle East and North Africa: Implementing Regulatory Policy Principles to Foster Inclusive Growth*…, cit.

[29] OECD, *Regulatory Reform in the Middle East and North Africa: Implementing Regulatory Policy Principles to Foster Inclusive Growth*…, cit.

[30] Ibid.

representative municipal elections. This process is still ongoing and remains fraught with setbacks and challenges.[31] Many popular demonstrations in recent years have in fact erupted due to lack of access to basic services in often resource-rich but marginalized and underserved regions, such as the Rif mountain chain in Morocco, Tataouine governorate in Tunisia, and Ouargla province in Algeria.[32] The COVID-19 pandemic has further challenged governments' capacity to ensure the continuity and upgrade of essential public services to all. As a result, digital government has become an ever more pressing issue, with information and communication technologies as possible levers for administrative simplification, enhanced access to public services, and greater transparency and participation, as will be detailed below.

Integrity and rule of law remain fragile

Another obstacle to public-sector performance is corruption, which wastes public funds and resources, widens inequalities, undermines the rule of law, and reduces trust in institutions. Effective public governance relies on strong integrity systems and an independent and nonarbitrary judiciary to ensure fairness and equality between all citizens and businesses.[33]

From everyday petty corruption to statewide kleptocratic cronyism, corruption was pervasive in the region before the Arab uprisings. Elites across the region "captured the state" by concentrating power and wealth among the few, at the expense

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[31] Organisation for Economic Co-operation and Development (OECD), "Voix citoyenne en Tunisie: Le rôle de la communication et des médias pour un gouvernement plus ouvert", in *Examens de l'OCDE sur la gouvernance publique*, Paris, OECD Publishing, 2019; and Organisation for Economic Co-operation and Development (OECD), "Accompagner les réformes de la gouvernance locale au Maroc: Guide de bonnes pratiques", Paris, OECD, 2017.

[32] I. Fakir and S. Yerkes, "Governance and the Future of the Arab World", in *Arab Horizons*, Carnegie Endowment for International Peace, 2018; and D. Ghanem and E. Jrad, "When the Margins Rise: The Case of Ouargla and Tataouine", Berlin, Konrad-Adenauer-Stiftung, 2021.

[33] Organisation for Economic Co-operation and Development (OECD), *Public Integrity Handbook*, Paris, OECD Publishing, 2020.

of the many.[34] Corruption has widespread corrosive effects across societies undermining all aspects from the economy and human rights to security and the rule of law.[35] In the latter case, and especially before 2010-11, legislative and judicial processes were used in North Africa to enable corruption through absent or weak integrity rules and frameworks, and to encourage it by introducing arbitrariness and unfairness in front of the law. Although most countries in the region had enshrined the principle of judicial independence in their constitutions, the weight of executive authority severely restricted it. Across the region, judges were placed under the direct authority of the minister of justice and the executive, who controlled their nominations and postings, thus depriving them of their independence.[36] Legal mechanisms were often perverted and weaponized to ensure long-term control over the electoral process and the crackdown of political opponents.

Ten years after the Arab uprisings, corruption and justice indicators remain low in North Africa. In 2020, perceptions of corruption levels across the entire region were worse than average, according to the Corruption Perception Index, despite modest improvements since 2009, notably in Egypt (by 5 pp) Morocco (by 7 pp), and Algeria (by 8 pp). Once again, Libya fares worse since perceived corruption has actually deteriorated during the same time, by 8 pp.[37] Data for 2019 from the Arab Barometer reveal that many citizens across the region still consider bribes as necessary to obtain better services in healthcare (53%) and education (44.6%).[38]

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[34] J.S. Hellman, G. Jones, and D. Kaufmann, *Seize the State, Seize the Day: State Capture, Corruption and Influence in Transition*, Washington DC, World Bank*,* 2020.

[35] United Nations General Assembly, Resolution 58/4, United Nations Convention against Corruption, A/RES/58/4, October 31, 2003, https://www.unodc.org/unodc/en/treaties/CAC/.

[36] *The Reform of Judiciaries in the Wake of Arab Spring*, Euro-Mediterranean Human Rights Network, Proceedings of the Seminar of February 11-12, 2012, in Rabat.

[37] "Corruption Perceptions Index", Index 2020, Transparency International.

[38] S. Al Shami, "Arab Barometer Report: Perceptions of Corruption on the Rise across MENA", World Bank (blog), December 12, 2019.

Some positive developments should be acknowledged. As the aforementioned WGI reflect, Morocco and Tunisia made considerable efforts to strengthen their respective integrity frameworks. They both adopted national anti-corruption laws and reformed or created independent national anti-corruption agencies. In 2017, Morocco transferred the public prosecutor office from the Ministry of Justice to the Court of Cassation,[39] and Tunisia adopted a major whistleblower law, two strong signals in favor of rule of law and integrity.[40]

A major constitutional reform movement swept the region following the 2011 protests, enshrining fundamental civil rights and freedoms in new constitutions in Morocco (2011), Tunisia (2014), and Egypt (2014); in constitutional amendments in Algeria (2016); and in a draft constitution in Libya (2017); the initiatives have had varying degrees of success in practice.[41] Contrary to trust levels in government, popular trust in the legal system has actually increased in many countries since 2011, reaching an average of 58.75% in the region – Libya excluded – in 2019.[42]

Attempts for reparative justice have been undertaken in Egypt, Libya, and Tunisia. In the latter case, it resulted in the sentencing of President Ben Ali and his wife in absentia to thirty-five years in prison and a $65 million fine.[43] Tunisia

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[39] A. Chentouf, "Morocco's Pursuit of Judicial Independence", Carnegie Endowment for International Peace, November 28, 2017.

[40] Organisation for Economic Co-operation and Development (OECD), *Open Government in Tunisia*, Paris, OECD Publishing, February 8, 2016; and Organisation for Economic Co-operation and Development (OECD), *Diagnostic d'intégrité au Maroc: Mettre en ouvre des politiques d'intégrité pour renforcer la confiance*, Paris, OECD Publishing, July 11, 2018.

[41] I. Szmolka, "Political Change in North Africa and the Arab Middle East: Constitutional Reforms and Electoral Processes", *Arab Studies Quarterly*, vol. 36, 2014, pp. 128-48.

[42] "Social Capital in the Middle East and North Africa", Arab Barometer, November 2019.

[43] J. Sorensen, "Ideals without Illusions: Corruption and the Future of a Democratic North Africa", *Northwestern Journal of International Human Rights*,

also created a Truth and Dignity Commission that (despite many procedural and political challenges) examined 62,000 allegations of human rights violations and corruption going back as far as 1955,[44] and recovered 745 million Tunisian dinars ($270 million) in "arbitration and reconciliation awards".[45] Tunisia has been the most successful example of transitional justice in the region, though recent developments now raise questions about adherence to democratic principles.

In fact, the path toward good governance is nonlinear and an ongoing process requiring solid political institutions, sound legal and regulatory frameworks, and proven ownership of reforms by citizens. Despite the aforementioned achievements, progress remains slow paced and fragile. The implementation of ambitious constitutional provisions is lacking in some respects, and egregious infringements to rule of law persist.[46] COVID-19 was also used across the region to justify the extension of state of emergency prerogatives.[47] The following section will expand on the challenges faced by the civic space and citizens in terms of participation.

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[44] A. Ali, "Kinetic Karam: Bargaining for Dignity in the Pursuit of a New Arab Social Contract", in Y. Cherif (ed.), *The Modern Arab State: A Decade of Uprisings in the Middle East and North Africa*, Berlin, Konrad-Adenauer-Stiftung, 2021.

[45] Truth and Dignity Commission, *Tunisia, Final Comprehensive Report: Executive Summary*, May 2019,

[46] International Commission of Jurists (ICJ), *Egypt's Judiciary: A Tool of Repression - Lack of Effective Guarantees of Independence and Accountability*, ICJ with support from the Open Society Foundations, 2016; and E. Bellin and H.E. Lane, *Building Rule of Law in the Arab World: Tunisia, Egypt, and Beyond*, Boulder, Colorado, Lynne Rienner Publishers, 2016.

[47] F. Tamburini, "The COVID-19 Outbreak in North Africa: A Legal Analysis", *Journal of Asian and African Studies*, vol. 56, January 2021, pp. 1738-54.

Demand Side: Inclusive Governance

From the Bottom Up

Going beyond conceptualizations of governance as only the state's capacity to provide basic public goods and services, this section complements the previous one by assessing how citizens participate in decision-making across North Africa. The definition of "inclusive institutions" needed to promote economic development, per Daron Acemoglu and James A. Robinson, includes dimensions of participation and pluralism.[48] Similarly, the relationship between governmental and nongovernmental actors is often highlighted as a key element in the definition of governance in the literature.[49]

The future of the MENA region, observed Tamara Cofman Wittes, "will largely be determined by the quality of governance, not its mere existence".[50] While governance does not necessarily require the government to be democratic,[51] moving toward concepts of open state, government and societies can support countries in achieving a more inclusive, transparent, and accountable governance. Citizen participation, transparency, and open government are recognized as important trends by public officials in the MENA region: based on their Arab Administrative Elites Survey, Rahel M. Schomaker and Michael W. Bauer find that citizen participation is recognized

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[48] D. Acemoglu and J.A. Robinson, *Why Nations Fail: The Origins of Power, Prosperity, and Poverty*, New York, Crown, 2012.

[49] M. Howlett and M. Ramesh, "The Two Orders of Governance Failure: Design Mismatches and Policy Capacity Issues in Modern Governance", *Policy and Society*, vol. 33, no. 4, 2014, pp. 317-27, doi:10.1016/j.polsoc.2014.10.002; and R. Steurer, "Disentangling Governance: A Synoptic View of Regulation by Government, Business, and Civil Society", *Policy Sciences*, vol. 46, no. 4, 2013, pp. 387-410.

[50] T. Cofman Wittes, convener, *Politics, Governance and State-Society Relations,* Working Group Report of the Middle East Strategy Task Force, Atlantic Council Rafik Hariri Center for the Middle East and The Brookings Institution, 2016.

[51] Fukuyama (2013).

as an important trend by 41% of surveyed public officials, and transparency and open government by 48% of them.[52] However, only 15% report that participatory approaches have been used in practice to a significant extent in their own policy area. Inclusive institutions and citizen participation in policy making can create the necessary incentives and opportunities to harness creativity and diversity in society, avoid policy capture by the interests of narrow groups, and contribute to aligning policies with the needs of society, setting the foundations for inclusive growth, social cohesion, and trust in government.[53]

The WGI on voice and accountability provide an overall view on the extent to which countries' citizens are able to participate in selecting their government, as well as enjoy freedom of expression, freedom of association, and a free media. As Figure 2.3 shows, the indicator on voice and accountability was higher in 2019 than in 2010 in all North African countries except Egypt, although wide variations are recorded. In particular, Morocco's score has stagnated since the Arab uprisings in 2011, which largely left the kingdom's regime untouched. Algeria, Egypt, and Libya had experienced improvements in their ranking soon after 2011, although Libya and Egypt have seen their situation severely deteriorate since 2012, and Algeria has lost territory since 2014. Tunisia, with its unique transition toward democracy, stands out for significant improvements in its voice and accountability ranking, although it has experienced setbacks since 2016 as also illustrated in recent developments. Tunisia and Morocco's reform efforts have been significant at the national and international levels including, for instance, their adherence to the OECD Recommendation

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[52] R.M. Schomaker and M.W. Bauer, "Public Governance in the MENA Region: Reform Trends and Patterns", *International Journal of Public Administration*, vol. 43, no. 5, 2020, pp. 378-91, doi:10.1080/01900692.2019.1669179.

[53] Organisation for Economic Co-operation and Development (OECD), *Policy Shaping and Policy Making: The Governance of Inclusive Growth*, Background Report to the Public Governance Ministerial Meeting, 2015; and OECD, *Open Government: The Global Context and the Way Forward,* Paris, OECD Publishing, 2016.

of the Council on Open Government.[54] Despite variation and notable reform efforts across countries, inclusive governance nonetheless remains fragile in North Africa. Going beyond aggregate indicators, this section looks at the extent to which governance across North African countries is inclusive in terms of trust in government, civic participation, transparency, and citizens participation in policy making.

Fig. 2.3 - Voice and accountability across North Africa, 2010-2019

Score on the "voice and accountability" dimension of the Worldwide Governance Indicators (-2.5 to +2.5)
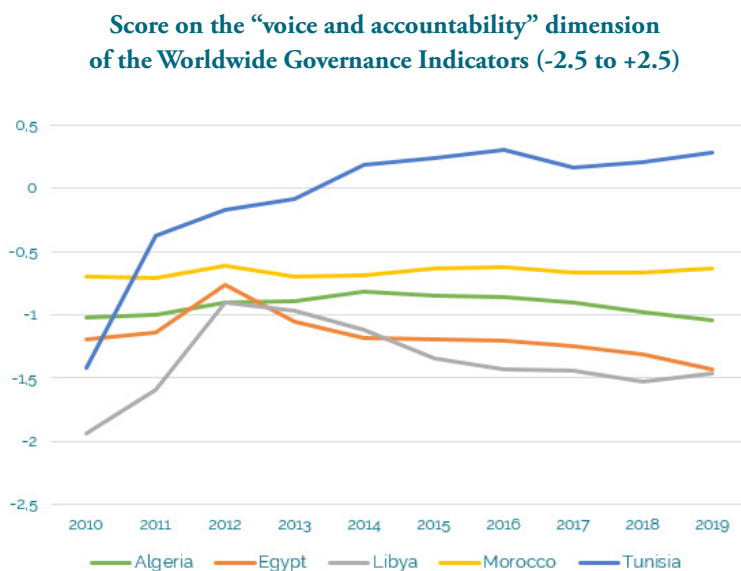
Source: Kaufmann et al., "World Governance Indicators," Research Data Set, 2019, World Bank (website)

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[54] Organisation for Economic Co-operation and Development (OECD), *Recommendation of the Council on Open Government*, OECD/LEGAL/0438, 2017, accessed June 30, 2020.

The trust deficit

The erosion of trust in national governments and public institutions has come to the forefront of the policy debate in numerous countries since the 2007-08 financial crisis. Inequalities in income and opportunities, unemployment and job insecurity, lack of economic growth, perceived corruption, and global challenges have often been recognized as elements undermining the confidence that citizens, and especially young people, express in institutions.[55] Across North African and Middle Eastern countries, the lack of trust between citizens, political leaders, and governments has been qualified as "perhaps the most daunting obstacle to the restoration of regional stability".[56]

Perceptions among citizens of rentier elites in the MENA region are negative and eroding, according to a study by Hamid E. Ali, using Arab Barometer data.[57] While citizens trust in government increased to 81% in Egypt and 66% in Tunisia immediately after the 2011 uprisings, for example, it has been shrinking, especially since 2016, with a fall of 15 percentage points (pp) in Egypt and 46 pp in Tunisia as of 2019. In Morocco, similarly, around 40% of respondents expressed trust in government in 2013, and only 29% of them did so in 2019.[58] Other political institutions, such as parliament and political parties, tend to enjoy even more limited trust than national governments.[59] The deficit of trust is particularly

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[55] Organisation for Economic Co-operation and Development (OECD), *Government at a Glance 2017*, Paris, OECD Publishing, 2017; OECD, "Governance for Youth, Trust, and Intergenerational Justice: Fit for All Generations?", in *OECD Public Governance Reviews*, Paris, OECD Publishing, 2020.

[56] Wittes (2016).

[57] H.E. Ali, "Public Perception of Rentier Elites in the Middle East and North Africa", *International Journal of Public Administration*, vol. 43, no. 5, 2020, pp. 392-403, doi:10.1080/01900692.2019.1677710.

[58] Arab Barometer*, Arab Barometer V: Morocco Country Report*, 2019, accessed June 28, 2021.

[59] A.-W. Kayyali, "The Arab World's Trust in Government and the Perils of

noticeable among young people in North Africa, which is a source of major concern given people aged 15-29 represent 21% of the population in Tunisia, 22% in Algeria, 24% in Libya and Morocco, and 25% in Egypt.[60]

Losing ground on media and civic participation

Evidence from the Arab Barometer suggests that the MENA region has broadly experienced a retrenchment of rights and freedoms since 2016, reversing numerous gains made in the early 2010s.[61] When citizens cannot speak freely, peacefully assemble, and protest or gather in associations, they will not be able to partake peacefully in public governance from the bottom up, rather laying the foundation for dissatisfaction and social unrest. Ali further highlights that traditional media across the region suffer from censorship and intimidation, and from a media elite highly dependent on government support.[62]

In Algeria, the extent to which respondents to the Arab Barometer believe that freedom of speech is guaranteed has dropped by 42 pp between 2013 and 2019; similar retrenchments are observed in terms of freedom of association and assembly (by 32 and 15 pp, respectively). Concerns notably include the limited fairness of elections, suppression of street protests, legal restrictions on media freedom, and rampant corruption.

In Morocco, the constitution that was adopted after the 2011 uprisings enshrines principles such as the protection of human rights, democratic participation, access to information, freedom of the press and association, good public governance, transparency, and integrity. The constitution also provides for the

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Generalization", Arab Pulse (blog), Arab Barometer, June 23, 2020, accessed June 30, 2021.

[60] Authors' calculations based on data collected from the UN's Department of Economic and Social Affairs, Population Division, *World Population Prospects: The 2019 Revision*; and PopulationPyramid.net.

[61] M. Robbins, "Freedoms and Retrenchment in MENA", Arab Barometer, 2020, accessed June 28, 2021.

[62] Ali (2020).

creation of independent institutions to guarantee the principles of good governance. Transforming the new constitutional provisions into concrete practices has, however, proven challenging.[63] For instance, reported perceptions of freedom of speech, freedom of assembly, and freedom of association have eroded since 2016 by 19, 11, and 27 pp, respectively, according to data from the Arab Barometer. Despite having a vibrant civil society, citizens and civil society organizations (CSOs) report that civil liberties remain constrained in practice.[64]

The Media Regulation Law in Egypt prescribes prison sentences for journalists who "incite violence" and permits censorship without judicial approval, among other provisions.[65] Egyptian CSOs also are severely constrained by the 2013 protest law.[66] Robert Hoppe and Nermeen Kassem notably point to the "criminalization of public dissent in the name of national security and counterterrorism, the use of legal reforms and decrees to institutionalize previously extrajudicial repressive practices, and targeted harassment and defamation of Egypt's leading human rights activists and organizations".[67] In Libya, CSOs suffered from the domination of the state over four decades of authoritarian rule: since 2011, CSOs have mushroomed, but their role and participation remain limited, suppressed, weak, or absent, and their members are often driven into exile.[68]

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[63] Organisation for Economic Co-operation and Development (OECD), *Open Government in Morocco*, OECD Public Governance Reviews, Paris, OECD Publishing, 2015.

[64] L. Khatib, "What Has Changed in the Arab World's Political Systems?", in Y. Cherif (ed.), *The Modern Arab State: A Decade of Uprisings in the Middle East and North Africa*, Berlin, Konrad-Adenauer-Stiftung, 2021.

[65] Ibid.

[66] Ibid.

[67] R. Hoppe and N. Kassem, "Civil Society Associations' Efforts to Influence Post-Uprisings Governmental Policymaking in Three Arab States: A Regimes-Triad Approach", *International Journal of Public Administration*, 2019, doi:10.1080/01900692.2019.1676257.

[68] Khatib (2021); and Y.M. Sawani, "Public Administration in Libya: Continuity

Perhaps unsurprisingly, Tunisia has stood out among the other North African countries in relation to media and civic participation. From gender equality to freedom of information, the provisions of Tunisia's 2014 constitution reflect "the spirit of the revolution".[69] Several key articles in that constitution enshrine the rights of citizens and civil society to participate in government decision-making and protect their freedoms. Tunisia also has ratified a large number of international instruments and adopted wide-ranging legal texts on human rights as well as on women's rights specifically. In fact, 66% of Tunisians surveyed by the Arab Barometer in 2019 reported that their right to free speech is guaranteed, while 50% say the same about their freedom to associate, and 48% about the freedom to demonstrate peacefully. Overall, civil society in Tunisia has space to be independent, it is able to operate outside of elite co-optation, and it has shown impact on policy making.[70] For instance, Tunisian unions, and especially the UGTT, play a central role in influencing policy and acting as government watchdogs. Hoppe and Kassem also highlight the example of the CSOs' energy and mining coalition (Coalition Tunisienne pour la Transparence dans l'Énergie et les Mines).[71] This coalition successfully pushed for the government decision to publish oil and gas contracts in June 2016, following sit-ins and demonstrations in Tunis and in the southern regions of the country, including at the oil-extraction site of Kamour, where protesters were asking for "a fair share" of the hydrocarbon profits. However, Tunisia also has experienced setbacks in the protection and promotion of media and civic participation since 2016, as also illustrated in recent developments.[72]

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and Change", *International Journal of Public Administration*, vol. 41, no. 10, 2018, pp. 807-19, doi:10.1080/01900692.2017.1387146.

[69] OECD, *Open Government in Tunisia…*, cit.

[70] Khatib (2021).

[71] Hoppe and Kassem (2019).

[72] Robbins (2020).

The COVID-19 pandemic has led governments across the world to take considerable action to limit the spread of the virus, including by temporarily limiting individual freedoms. The social acceptability of such measures is critical for their effectiveness. The latest results from the Arab Barometer, in 2021, indicate that 66% of Algerians and Moroccans as well as 53% of Tunisians surveyed considered it sometimes or always justifiable for the government to limit freedom of speech during a public health emergency. The survey also found large support among Algerian, Moroccan, and Tunisian respondents for censorship of the media during a public health emergency. The impact of the COVID-19 crisis on media and civic participation might have lasting consequences: as Daniella Raz notes, "the pandemic will eventually end, but the corrosion to civil liberties could prove more resilient and enduring than the virus itself".[73]

A new dimension is emerging around internet-related freedoms. In North African countries, limited access, limits on content and websites, violations of user rights, surveillance systems, and crackdowns on online journalists are common concerns when it comes to freedoms on the Internet. In Egypt, there are also concerns about increased website blocking, social media disruptions, and pretrial detentions of online journalists and activists. For instance, the Anti-Cyber and Information Technology Crimes Law gives Egyptian authorities the possibility to block websites considered to be a threat to national security; however, the law's broad definition is considered vulnerable to abuse.[74]

Transparency

When looking at governance as a relationship between principals and agents, it becomes clear that transparency and access to information are crucial elements: principals (citizens)

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[73] D. Raz, "Is COVID-19 Compelling Arab Citizens to Surrender Freedoms to Their Governments?", Arab Barometer, 2021.

[74] "Freedom in the World 2021: Egypt", Freedom House.

need to have access to information on the behavior of agents (the government, legislators, and bureaucrats) to keep them accountable.[75] Transparency and information are by definition aspects of governance, but they also have been found to be positively correlated with reduced corruption,[76] better service delivery,[77] and factors affecting economic growth.[78]

Differently from their North African neighbors, Morocco and Tunisia have made important progress in promoting transparency and access to information through constitutional norms recognizing citizens' right of access to information (ATI) and through laws setting specific ATI provisions. For instance, Tunisia's 2016 Organic Law on the Right to Access Information, and Morocco's 2018 Right to Information Law (in force since March 2020), allow citizens to request access to laws, data, and reports retained by government and public authorities and gain access to the information within twenty days. Digital government also can contribute to creating greater transparency.[79] For instance, Tunisia has adopted a national

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[75] Fukuyama (2016).

[76] T. Blumkin and M. Gradstein, *Transparency Gloves for Grabbing Hands? Politics and (Mis)Governance*, Discussion Paper, Centre for Economic Policy Research, 2002; R. Reinikka and J. Svensson, "Local Capture: Evidence from a Central Government Transfer Program in Uganda", *Quarterly Journal of Economics*, vol. 119, no. 2, 2004, pp. 679-705, doi:10.1162/0033553041382120; and L. Etter, "Can Transparency Reduce Corruption? Evidence from Firms in Peru and Mali on the Impact of the Extractive Industries Transparency Initiative (EITI) on Corruption", (presentation, Doing Business Conference, Georgetown University, Washington DC, 2004).

[77] R. Islam, "Does More Transparency Go Along with Better Governance?", *Economics and Politics*, vol. 18, no. 2, 2006, pp. 121-67, doi:10.1111/j.1468-0343.2006.00166.x; and L. Peisakhin and P. Pinto, "Is Transparency an Effective Anti-Corruption Strategy? Evidence from a Field Experiment in India", *Regulation and Governance*, vol. 4, no. 3, 2010, pp. 261-80, doi:10.1111/j.1748-5991.2010.01081.x.

[78] R. Glennerster and Y.Shin, *Is Transparency Good for You, and Can the IMF Help?,* International Monetary Fund Working Paper, WP/03/132, 2003.

[79] Organisation for Economic Co-operation and Development (OECD), *The COVID-19 Crisis: A Catalyst for Government Transformation?*, Paris, OECD

e-government strategy, which resulted in the creation of a national platform for open data, an e-procurement platform, and individual open data platforms for specific ministries. In January 2021, Tunisia took one step further, mandating by decree all public institutions to proactively make public data available on the national data portal. Laws, decrees, and orders are made available online for free within three days of issuance (www.iort.gov.tn/).[80] There are, however, notable barriers to the effective implementation of ATI laws in Tunisia and Morocco: requirements for such implementation include a well-funded oversight institution, specialized ATI staff in public bodies, a fitting institutional and personal culture on information, and a robust civil society at the national and subnational levels.[81]

Citizen participation and accountability

Governments in the MENA region have become more sensitive to public opinion since the 2011 uprisings out of fear of renewed mass mobilizations, as Wittes notes.[82] Real accountability, however, requires inclusive public governance arrangements that allow all citizens to actively participate in how decisions are made and implemented, and to keep their government accountable.

One way for citizens to influence policy is through voting and running as candidates in free and fair elections in a pluralist political system. Egypt shows clear limitations when it comes to elections.[83] In Libya, several elections were held at the local level

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Publishing, November 10, 2020.

[80] OECD, "Voix citoyenne en Tunisie: Le rôle de la communication et des médias pour un gouvernement plus ouvert…, cit.; and OECD, "Open Government in Tunisia…, cit.

[81] OECD, "Voix citoyenne en Tunisie: Le rôle de la communication et des médias pour un gouvernement plus ouvert…, cit.; and Organisation for Economic Co-operation and Development (OECD), "Voix citoyenne au Maroc: Le rôle de la communication et des médias pour un gouvernement plus ouvert", in *Examens de l'OCDE sur la gouvernance publique,* Paris, OECD Publishing.

[82] Wittes (2016).

[83] Khatib (2021).

in 2019-20, but the governance split between the eastern and western sides of the country has so far not allowed free and fair elections at the national level. In Algeria, following the widespread protests that started in February 2019 (also known as *Hirak*) and following President Bouteflika's resignation, presidential and parliamentary elections were held in 2019 and 2021, respectively; these elections had historically low turnout amid boycotts, and outside observers were not allowed to monitor the polls.[84] On the other hand, Tunisia had made remarkable progress since 2011, holding multiple rounds of national and local elections since 2011, with dozens of political parties (including the "Muslim-democratic" *Ennahda* party) participating under nonconstraining laws in free and fair elections.[85] Tunisia has also made significant strides in promoting gender equality in public and political life: since 2014, gender equality in elected assemblies is recognized as a constitutional principle. To implement this provision, Tunisia has adopted gender quotas mandating party lists to include male and female candidates alternately. In Morocco, political space was opened up for the Muslim Brotherhood-inspired Justice and Development Party (PDJ) to play a key role in government, although the political system remains largely controlled by the monarchy.[86]

At the same time, free and fair electoral processes do not per se ensure citizen participation. First, public governance measures are crucial to reduce the specific legal, economic, and cultural barriers that hamper the electoral participation of certain groups such as young people and women.[87] Second, having freely and

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[84] News Wires, "Turnout at Lowest in 20 Years in Divisive Algerian Parliamentary Elections", *France 24*, June 13, 2021.

[85] Khatib (2021).

[86] Ibid.

[87] Organisation for Economic Co-operation and Development (OECD), *Renforcer l'autonomie et la confiance des jeunes au Maroc*; OECD, Governance for Youth, Trust and Intergenerational Justice, Paris, OECD Publishing, 2021; OECD, *La place des femmes dans la vie politique locale en Tunisie*, OECD, 2018, accessed July 12, 2021; and OECD and the Center of Arab Woman for Training and Research, *Women in Public Life: Gender, Law and Policy in the Middle East and North Africa*, Paris, OECD

fairly elected representatives can promote (indirect) citizen participation only to the extent that representatives themselves have influence on policy making and are accountable to the electorate.

Beyond elections, governments in North Africa have adopted a wide array of mechanisms to open up since the 2011 uprisings. In 2014 and 2018 respectively, Tunisia and Morocco joined the Open Government Partnership (OGP), a multilateral partnership launched in 2011 that aims to "empower reformers inside and outside of government who are seeking to open up their governments" by supporting the design, implementation, and monitoring of concrete government commitments "to make government more open, responsive, and accountable to citizens".[88] In this context, Tunisia and Morocco have elaborated and implemented action plans with commitments including on opening their governments to citizens. While commitments in Tunisia and Morocco have been significant, implementation remains a major challenge.[89] Initiatives to promote citizen participation also can be adapted to target specific groups that are underrepresented in formal politics, such as women and young people. Yet to ensure meaningful participation, citizens need to be equipped with the opportunity and the resources to collaborate during all phases of the policy cycle, including financial and human resources as well as access to information. At the same time, public officials need appropriate skill sets and resources for engaging with underrepresented groups, appropriate incentives to close the feedback loop, and good structures for consultation and coordination.[90]

Publishing, 2014, accessed July 12, 2021.

[88] Open Government Partnership, *The Open Government Partnership's Implementation Plan 2020-2022: Draft*, February 2020, accessed August 9, 2021.

[89] N. Dutta and T Ninua, "Jordan, Morocco, Tunisia: Civic Space as a Key Prerequisite of Open Government Reforms in the MENA Region", Open Government Partnership blog, part of *Independent Reporting Mechanism (IRM) Week: A Year in Review*, November 3, 2020.

[90] OECD, "*Governance for Youth, Trust, and Intergenerational Justice: Fit for All Generations?*"…, cit.

Instead, excluding citizens (and especially marginalized ones) from engaging in policy making can create disillusion, if not dissatisfaction and social unrest.

As mentioned, Morocco and Tunisia have embarked on significant decentralization reforms since 2011. These processes can bring public governance closer to citizens and open up further spaces for citizen participation and accountability. Instead, a high level of centralization of public authority risks undercutting and crowding out mechanisms of accountability.[91] For instance, in the framework of municipalities' powers in the allocation of resources, La Marsa was the first municipality in Tunisia to institute a participatory budgeting program, involving citizens in the design of street-lighting services through public meetings, focus groups, and voting.[92] However, Tunisian decentralization efforts, among others, have been hampered by the instability of elected councils, confusion over the distribution of functions and competencies, and a lack of human and financial resources.[93] Similarly, in Libya, the Local Governance Law adopted in 2012 by the now-defunct General National Congress effectively limited the autonomy of local councils vis-à-vis the Ministry of Local Affairs, as they are exposed to the risk of being replaced and/or deprived of ministry funding, which is often their sole source of revenue.[94]

Conclusion

Public governance, as Schomaker and Bauer note, is shaped by "the impact of the past and the aspirations for the future".[95] Ten years after the 2011 Arab uprisings, the impact of the past is

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[91] Schomaker and Bauer (2020).

[92] Organisation for Economic Co-operation and Development (OECD), *Supporting Open Government at the Local Level in Jordan*, Paris, OECD Publishing, 2020.

[93] Fédération Nationale des Communes Tunisiennes, *Le décentralisation vue par les communes: Rapport synthétique*, 2021.

[94] Sawani (2018).

[95] Schomaker and Bauer (2020).

still very much felt. The pace of reforms in North Africa has not been sufficiently steadfast and implementation of policy changes is found wanting. On the supply side, the governance deficit is characterized by underperforming public administrations with prevailing big governments, poor quality policies and services, and fragile integrity and rule of law. On the demand side, after initial quick progress in the aftermath of the uprisings, low trust remains pervasive, civic space is losing ground, and efforts to improve transparency and citizen participation need to be strengthened.

However, aspirations for a better future, with more accountable, transparent, open, and efficient governance, are widespread in North African societies. Despite the impact of the COVID-19 pandemic, the region has demonstrated incredible resilience. The region continues to be an inexhaustible source of talent, ideas, and innovation, especially from younger generations, that can and should be leveraged.

Public governance is essential for governments to renew the social contract with their citizens and deliver on their expectations. Without an efficient and inclusive government, they will be unable to manage old and new challenges including economic reforms, climate change (chapter 3), demographic transformations (chapter 5), and infrastructure development (chapter 4). The pathway to recovery from the COVID-19 crisis presents a once-in-a-lifetime opportunity for countries in North Africa to reform and modernize their public governance frameworks and seize the "achievable governance revolution".[96] In doing so, countries can and should draw from the wealth of experience already existing in the region to learn from each other and adopt the best solutions for their current challenges. For instance, the MENA-OECD Governance Programme is a strategic partnership that fosters sharing knowledge and expertise, including the dissemination of good governance standards and principles between MENA and

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[96] Beschel Jr. and Youssef (2021).

OECD countries.[97] Such intergovernmental fora can effectively support countries in North Africa and beyond, informing and enhancing their reform efforts to build effective and inclusive public governance.

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[97] The OECD and The MENA region and North Africa, "About the MENA-OECD Governance Programme", OECD (website), 2021.

3. Managing Climate Change and Mapping an Energy Transition in North Africa

Aldo Liga

Summer 2021 has dramatically exposed North Africa's vulnerability to the climate crisis as the region was ravaged by wildfires, drought, and extreme weather events.

Wildfires in Algeria and Tunisia have destroyed hectares of forests, leaving behind dozens of casualties as heat waves swept through Egypt, with temperatures surpassing 40° Celsius during the day for more than a week. According to a draft report by the Intergovernmental Panel on Climate Change, the Mediterranean is a "climate change hotspot" which will face highly interconnected climate risks, such as land and marine biodiversity losses, risks related to drought, wildfire, alterations of water cycle, endangered food production and serious health risks for the population.[1]

According to the World Bank, changes in water availability are set to become the main driver of internal climate migration, in particular from areas of the Nile Delta, the northeastern coast of Tunisia, the northwestern coast of Algeria, western and southern Morocco, and the central Atlas foothills. Meanwhile, cities like Cairo, Algiers, Tunis, Tripoli, the Casablanca-Rabat corridor, and Tangiers are projected to become "climate

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[1] AFP Staff, *Mediterranean faces fiercer heatwaves, drought, fires: UN draft report*, RFI (website of French public radio station), August 6, 2021.

in-migration   hotspots,"[2] as water scarcity or sea-level rise elsewhere drive people toward them.

Against this backdrop, tackling global warming is of the utmost importance for the security and prosperity of the region: key actions include changing the path of economic development and undertaking a structured effort toward a clean energy transition, which is part of climate change adaptation measures. This process, which is slowing developing across the region, is not devoid of significant internal political and socioeconomic implications. It also has a strong impact on the external projection of the countries of the region, redefining their commercial relations and foreign policies.

In North Africa, the penetration of renewable energy is very limited compared to its potential, which is largely untapped. Nonetheless, renewable electricity has grown more than 40% over the last decade, driven by the expansion of wind, solar photovoltaic (PV), and solar thermal power.[3] This transition to renewable energy sources is at an early stage in North Africa (and in some cases feel more like political rebranding rather than a structural package of reforms), yet the development and implementation of strategies are emerging as useful tools in understanding current and future political scenarios in the region.

The first section focuses on the promotion of an energy transition in North African states; the second analyzes the role of foreign countries and international companies in sustaining local pathways to this transition and the broader implications in geopolitical terms; and the third will speculate on how the energy transition could result in growing regional interconnections and economic integration.

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[2] The World Bank, *Millions on the Move in Their Own Countries: The Human Face of Climate Change*, September 13, 2021.

[3] International Energy Agency (IEA), *Clean Energy Transitions in North Africa,* Country Report, October 2020.

Energy Transition in North Africa: Policies and Implementation

From an energy perspective, North Africa is a very diverse region. Tunisia and Morocco are heavily dependent on energy imports, Algeria and Libya are net energy exporters, and Egypt has emerged as a major natural-gas exporter in recent years. The five countries of the region have different energy mixes and different sources of electricity generation. This implies that the path toward a clean energy transition has a different impact on each country, depending on the importance of the energy sector for the domestic socioeconomic equilibrium, the impact of the volatility of fossil-fuel prices and the role of energy imports , and the composition of their respective energy mixes.

All the countries are experiencing a strong increase in internal energy demand, due to economic growth, population growth, and rapid urbanization. The fundamental priority of the energy policies of each North African country is increasing its power-generation capacity: energy security drives policies and investments.[4]

For oil-importing countries, the energy transition is crucial to diversifying the domestic energy mix, reducing dependency on external suppliers, and mitigating vulnerability to price shocks. For oil-exporting countries that are highly dependent on export revenues, the energy transition could help to satisfy growing internal demand, thus increasing availability of resources for exports.

Rabat and Cairo : North African leader of the transition

Morocco and Egypt are the North African leaders of the energy transition, both in terms of installed capacity from renewable sources and being proactive in promoting a clean-energy transition within and outside their borders.

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[4] S. Duygu Sever, *Accelerating the Energy Transition in the Southern Mediterranean,* French Institute of International Relations (IFRI), Editoriaux de l'Ifri, September 2019.

Morocco imports more the 90% of its energy supplies. Its energy mix is essentially met by the use of fossil energy sources (mainly oil and coal), and new coal-fired power plants have been recently opened or are planned. Nevertheless, the country has identified in the energy transition a strategic axis of development, benefiting from political support at the highest level.

In 2009, Rabat adopted its National Energy Strategy with the ambition of reaching 42% of the total installed power capacity coming from renewable energy in 2020. This goal has recently been updated to 52% by 2030. Today, 31% of its electricity capacity comes from renewable energy, one of the highest percentages among the countries of the entire MENA region.

The Noor Power Station, a solar-power complex based on a concentrated solar and photovoltaic system that is located near Ouarzazate, is the symbol of the Moroccan strategy for the energy transition. It entered into operation gradually, beginning in 2016, and once completed will produce a total of 582 megawatts (MW). With its 300 MW of capacity, the wind plant of Tarfaya is one of the biggest on the continent.

Rabat has reaffirmed its commitment to the Paris Agreement, presenting an ambitious revision of its nationally determined contributions (NDCs) to reduce greenhouse gas emissions by 45.5% by 2030. The monarchy aspires to be the regional leader in the struggle against climate change: Marrakech has hosted two United Nations Climate Change conferences, in 2001 (COP7) and 2016 (COP22).

The country established a comprehensive set of institutions to facilitate the promotion of clean energy sources: the Moroccan Agency for Solar Energy (MASEN), now Moroccan Agency for Sustainable Energy; the National Electricity Regulatory Authority of Morocco (ANRE); the Institute for Research on Solar Energy and New Energies (IRESEN); and the Moroccan Agency for Energy Efficiency (AMEE).

Egypt, with an installed capacity of 5.9 gigawatt (GW) from renewable sources, has the most renewable energy capacity in the

region and the second most-developed strategy for the energy transition, after Morocco. Cairo emerged as a regional energy leader in recent years, following the 2015 discovery of the Zohr natural gas field by Eni SpA, an Italian energy company. With its 850 billion cubic meters of gas, Zohr is the largest eastern Mediterranean gas field, and its discovery marked the advent of Egypt's energy self-sufficiency. Exporting surplus natural gas to neighboring countries is an essential piece of the Egyptian strategy to become a regional energy hub.

In 2015, the country launched its 2035 Integrated Sustainable Energy Strategy, with the aim of producing 20% of its electricity from renewable sources by 2022 and 42% by 2035, for a total of 61 GW of installed capacity from renewables.

Renewable energy currently accounts for only 10.1% of Egypt's power production capacity, with hydropower accounting for over three-quarters of the total.[5] The Benban Solar Park, a major infrastructure project under construction near the southern city of Aswan, will produce 1.8 GW and is deemed the largest African PV solar park. It will consist of about forty solar plants, developed by more than thirty foreign companies from twelve countries, and will supply power to more than two million households. Ras Ghareb wind farm, with its 262.5 MW of power capacity, is the biggest in the country.

As part of the growing attention Egypt is paying to the energy transition, the country will host the next United Nations Climate Change Conference (COP27), set to be held in Sharm el-Sheikh in November 2022. It will be the occasion to measure the regional influence of the country in the struggle against global warming.

It is worth mentioning that Egypt will be the first North African country using nuclear energy for its power production, with the El Dabaa plant (developed by Russia's state-owned Rosatom) set to be in service by 2030.

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[5] M. Tanchum, *Egypt's Prospects as an Energy Export Hub Across Three Continents*, ISPI Commentary, ISPI, September 24, 2020.

In both Morocco and Egypt the deployment of solar, concentrating solar-thermal power, and wind technologies has been linked to their employment strategies: the goal of diversifying the energy mix is connected with the necessity to mitigate high youth unemployment. Morocco aimed to create jobs in project management, installation, construction, operation, and maintenance activities, and has reached a 32% local integration rate for the Noor I solar power-plant project. Egypt's government established employment quotas through local content requirements. In 2018, Egyptian manufacturers produced half of the components used in the country's wind farms.[6]

Algeria, Tunisia, and Libya: The slow path of transition

Much like Morocco and Egypt, the other North African countries have developed strategies to promote renewable energy in their power generation, but the process toward clean energy has been undertaken with less emphasis and new projects experience delays in their entry into operation.

In Algeria, economic diversification is crucial to ensure a sustainable future, yet the energy transition has only recently attracted meaningful political attention. This is also due to the so-called volatile volatility of energy crises: when oil prices drop, impacting energy revenues and endangering the fragile social equilibrium of a country, the political discourse focuses on the importance of reforming the energy sector; when prices go up, the question fades to the background. The energy transition is quite urgent in Algeria given its rentier state configuration, dependence on exports for fiscal revenues, government spending needs, and fast-growing domestic energy consumption. Notably, the country's energy industry is one of the most polluting in the world in terms of the methane intensity of oil and gas production and gas flaring.[7]

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[6] S. Côté, *Renewable Energy and Employment: The Experience of Egypt, Jordan and Morocco*, King Abdullah Petroleum Studies and Research Center (KAPSARC), November 2019. doi: 10.30573/KS--2019-DP69

[7] L. Baccarini et al., *Les enjeux énergétiques en Afrique du Nord: Algérie, Libye, Égypte*, Observatory for the Security of Energy Flows and Materials (in coordination

Algiers created its first energy-transition plan in 2011 and updated it in 2015. Known by its acronym, Pneree (for *Programme national dédié au développement et la promotion des énergies renouvelables et de l'efficacité énergétique*), the ambition is to reach 40%t of power production from renewable energy before 2030. In 2020, the government launched the National Program for Energy Transition (PNTE) and created a ministry for energy transition. The PNTE aims to reach 4,000 MW of renewable energy before 2024 and 16,000 MW before 2035. At the moment, the country has 686 MW of installed renewable capacity. The most important infrastructure is located in Hassi R'Mel (hybrid gas-solar), Ouargla and Ghardaïa (solar), and Kabertene (wind). Construction on a complex (Tafouk 1) that will allow the country to reach the 2024 target has not yet begun.

In Tunisia, the Renewable Energy Action Plan 2030 was adopted in 2015 and set a target of 30% of electricity production through renewable energy before 2030. The goal is quite ambitious, since the current share of renewable electricity capacity is around 6% (the rest of electricity is produced by natural gas). The country has three wind farms and one solar power plant, built in 2019.[8]

Due to Libya's protracted situation of conflict, the nation has not implemented a comprehensive strategy on energy transition. In 2012, before the outbreak of the civil war, the government approved the Libya Renewable Energy Strategic Plan 2013-2025, with the aim of achieving a 7% renewable energy contribution to the electric energy mix by 2020 and 10% by 2025. The Renewable Energy Authority of Libya has

with the Institute of International and Strategic Relations (French acronym, IRIS), in a consortium with Enerdata and Cassini, under contract to the General Directorate of the French Ministry of the Armed Forces), Report no. 8, June 2021.

[8] A. Bennis, *Power surge: How the European Green Deal can succeed in Morocco and Tunisia*, Policy Brief, European Council on Foreign Relations (ECFR), January 26, 2021.

recently presented its Strategic Plan for Renewable Energies, 2018-30, setting the target of reaching 6.6 GW of renewable capacity by 2030. In June, Abdul Hamid Dbeibah, prime minister of the Government of National Unity (GNU) , agreed to refer the Paris Agreement to the House of Representatives for ratification, which definitively approved it in September.

TAB. 3.1 – RENEWABLE EBERGY IN NORTH AFRICA

Country	Renewable Energy Share of Electricity Capacity (%)	Total Renewable Energy (MW)	Solar Energy (MW)	Wind Energy (MW)
Algeria	2.8%	686	448	10
Egypt	10.1%	5 980	1694	1375
Libya	0.0%	5	5	0
Morocco	30.9%	3 447	734	1405
Tunisia	6%	401	95	244

Every country of the region has approved specific provisions for a clean energy transition, although implementation has been delayed. In addition to this, most of the approved energy policies are supply-side driven, while demand-side measures and energy efficiency could play a crucial role in reducing consumption, especially in the transportation, housing, and industrial sectors.[9]

The suppression of energy subsidies is key to promoting energy efficiency. Morocco has gradually phased out its system of fossil fuel subsidies . Elsewhere in the region, subsidies in 2020 accounted for gross domestic product (GDP) of 2.2% in Egypt, 5.8% in Algeria and 15% in Libya.

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[9] S. Duygu Sever (2019).

Energy Transition and Climate Diplomacy

The speed in implementing energy-transition strategies will have an impact on a number of sensitive questions for the future of the area: economic diversification, industrial development, the labor market, and its vulnerability to the threats of climate change.

The energy transition also will affect North Africa's place in the world: the international standing of nations, their foreign policies, and regional ambitions. At the same time, the untapped potential of renewable energy in North Africa and its local markets are at the center of the commercial policies of other interested parties such as the European Union (EU), the Gulf countries, and China.

The EU is the top trade partner of North African countries, and major European energy companies are active in the development of the energy transition in the region.

Within the EU, Germany has developed a comprehensive strategy to promote the green transition. Berlin launched specific bilateral energy partnerships with Algeria, Morocco, and Tunisia, showing the extent to which technical and development assistance, intergovernmental policy dialogue, and private-sector involvement are at the center of German influence in the Mediterranean. The most advanced partnership has been established with Morocco and is focused on the development of renewable energy sources and efficient energy technologies, as well as on green hydrogen production. Egypt and Germany established the Cairo Climate Talks (CCT) in 2011 with the aim of fostering cooperation between Egyptian and German policy makers, businesses, the scientific community, and civil society in the field of energy and environment.

Far from being a technical issue, energy transition is a field where foreign policy could play a crucial role, facilitating or interfering with its development. For instance, energy bilateral cooperation between Morocco and Germany was suspended last May due to the diplomatic crisis that arose between the two countries after Germany's request for a UN Security

Council meeting on the status of Western Sahara.[10] Berlin's request followed the December 2020 US decision to recognize Moroccan sovereignty over lands identified by the United Nations as a "non-self-governing territory," which came amid the Trump administration's brokering of the normalization of relations between Morocco and Israel. [11] The diplomatic crisis between Berlin and Rabat may incur a high cost for Morocco, given the €1.4 billion it receives in development cooperation .[12]

At the same time, normalization of relations with Israel will probably result in much narrower cooperation on clean energy: in January 2021, green technologies and renewable energy industries were identified as industrial sectors with high potential for the Morocco-Israel partnership.[13] This is an interesting example of the interplay between energy transition, foreign policy and regional ambitions.

Energy transition is an emerging piece of the Morocco's Africa policy: the country hosted the first Africa Action Summit on the sidelines of COP22 and established a Coalition for Sustainable Energy Access with Ethiopia (CSEA).

Gulf countries are increasingly active in the North African energy transition, mainly in Egypt, their major ally in the region. ACWA Power, partly owned by the Saudi Arabian government, has backed significant projects in Egypt, such as the Kom Ombo solar plant, a 200-MW complex. Riyadh has recently launched a Middle East Green Initiative, with the purpose of transforming the country into "a global leader in forging a greener world."[14]

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[10] *News Wires*, "Morocco Recalls Ambassador in Germany over Western Sahara", Deutsche Welle (website of Germany's international broadcaster), May 7, 2021.

[11] J. Mundy, "The U.S. Recognized Moroccan Sovereignty over the Disputed Western Sahara: Here's What That Means", *Washington Post*, December 11, 2021; and A. Gearan et al., "Morocco and Israel to Establish Diplomatic Relations with U.S. Backing", *Washington Post*, December 10, 2021.

[12] F. Peregil, E.G. Sevillano, "La tensión por el Sáhara Occidental deja en el aire la ayuda al desarrollo de Berlín a Rabat", *El País,* June 18, 2021.

[13] "Morocco-Israel: Sectors with High Partnership Potential Identified", *Agence Marocaine de Presse*, December 28, 2020.

[14] K. Elgendy, *Competition hots up for climate leadership in MENA*, Expert Comment,

The United Arab Emirates are competing with Riyadh for climate leadership in the MENA region. AMEA Power will develop a 500-MW wind project in the Gulf of Suez and a 500-MW solar PV scheme in Aswan governorate in Egypt. Another Emirati energy firm, TAQA, announced in March that by the end of the decade more than 30% of its power generation would come from renewable sources.[15] The company plans to expand its renewables portfolio and electricity assets in Morocco, where it is the largest private electricity producer. Masdar, headquartered in Abu Dhabi, is part of a consortium which is developing the Noor Midelt Phase 1, a multi-technologies solar power plant which will have a total installed capacity of 800 MW. Ministries from Egypt and Morocco recently took part in the UAE Regional Dialogue for Climate Action.

China is another important player in North Africa's energy transition. In the past twenty years, Beijing has increased its presence in the region in terms of trade and investment. After the Beijing visit of Moroccan King Mohammed VI in May 2016, strong cooperation was established between the two countries. China has invested in the Moroccan energy transition, with the Shandong Electric Power Construction Corp. involved in the construction of the Noor solar complex. In the north of Morocco, state-owned China Communications Construction Co. and its subsidiary, China Road and Bridge Corp., is financing the Mohammed VI Tangier Tech City, which will host food industries and automotive, aeronautical, renewable energy, chemical, and textile production plants. In Egypt, China Gezhouba Group is investing in the construction of a 500-MW solar power.[16]

Chatham House, May 10, 2021.

[15] "UAE energy firm TAQA plans to expand its renewables portfolio", *Reuters*, March 24, 2021.

[16] M. Forough, *Towards Sustainable China-MENA Relations in the Renewable Energy Sector*, Leiden Asia Centre, September 2021.

Can the Transition Foster Regional Economic Integration?

North Africa stands in a strategic position at the crossroads of trans-Mediterranean and trans-African human and commercial flows. However, the region has one of the lowest levels of regional economic integration in the world: the lack of connectivity is a major obstacle for the future prosperity of the area.

In this respect, the energy transition could open new opportunities for sustainable economic growth and regional integration, establishing new connections and serving as an essential vector of political transformation. Energy infrastructure between North African countries and their European and sub-Saharan partners, transporting, for example, green hydrogen or electricity produced through renewable sources, could boost the green economic transition in the different regional subsystems – with positive spillover in terms of economic diversification, employment opportunities, political dialogue, and regional integration.

The latter could be highly consequential for North Africa, which is one of the world's most susceptible regions to global warming. Regional integration of energy infrastructure can decrease vulnerability to the consequences of climate change and help ensure energy security.[17]

The external dimension of the European Green Deal, the EU package to reach carbon neutrality by 2050, represents a potential leverage for strengthening regional economic integration between the two shores of the Mediterranean. Around 30% of the EU 2021-2027 budget for external cooperation is devoted to climate change mitigation and adaptation.

Last June, the EU and Morocco announced the intention to establish a "Green Partnership on energy, climate and the environment",[18] to strengthen cooperation in the struggle

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[17] International Energy Agency (IEA) (2020).
[18] The EU and Morocco form a Green Partnership on energy, climate and the environment ahead of COP 26, https://ec.europa.eu/clima/news-your-voice/

against climate change. Similar partnerships could be extended to other countries of the region.

Accelerating the energy transition on its southern shore will help the EU to diversify its energy suppliers, thus increasing its energy security. North African countries hold a strategic position due to their proximity to European energy markets. For instance, the EU Hydrogen Strategy has "an important international dimension that can benefit both North African countries and EU member states by increasing their use of hydrogen".[19] Green hydrogen could be produced through the use of renewable sources in North Africa and then exported to Europe using existing gas pipelines: the Maghreb-Europe (between Algeria, Morocco, and Spain); Medgaz (Algeria-Spain); Transmed (Algeria, Tunisia, and Italy); and the Greenstream (Libya-Italy).

Electrical interconnections across the Mediterranean sea will be an additional factor of systemic transformation in the area. Progress toward an integrated Mediterranean electricity market will require new infrastructure for transmission and distribution. While a network of electrical interconnections is already in place between Morocco and Spain, Italy and Tunisia are finalizing a project for an undersea electricity connection that will link up the electrical substations of Partanna, in Sicily, with the corresponding Tunisian substation of Cap Bon.

Electricity from North Africa needs to be clean. In July 2021, the European Union proposed the Carbon Border Adjustment Mechanism, a measure conceived to prevent so-called carbon leakage from EU-based companies that could otherwise move carbon-intensive production abroad to take advantage of lax standards and to accelerate the decarbonization strategies of trading partners.[20] Thanks to a new coal-fired plant opened in

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news/eu-and-morocco-form-green-partnership-energy-climate-and-environment-ahead-cop_en

[19] A. Bennis (2021).

[20] European Commission, "Carbon Border Adjustment Mechanism", Taxation and Customs, Fact Sheet of July 14, 2021.

Safi at the end of 2018, Morocco began net exporter of electricity to Spain the following year, rising concerns in Madrid over the consequences of the exports of Moroccan "dirty" electricity on its electricity sector.[21]

Cross-border grid interconnections in North Africa are weak, but the region's countries are planning to improve them. It is worth mentioning that the region has successfully achieved near-universal access to electricity and clean cooking, with more than twenty million people gaining access to electricity in the last twenty years.[22]

Algeria recently announced a plan to build direct electricity connections with the Libyan national grid. Egypt plans to export its electricity to Libya, Sudan, Saudi Arabia, Greece, and Cyprus.[23] Thanks to recent discoveries of natural gas and its potential in renewable energy, Egypt's surplus capacity could reach an estimated 74.4 GW in the next fifteen years and potentially transform the country into an electricity-trading hub.[24]

Power generation from renewable sources is not the only sector that could improve regional economic integration: the automotive sector is another promising one. At the end of August, Stellantis, a multinational automotive manufacturer, announced that its subsidiary, Opel, will start producing electric vehicles in Morocco.[25] The country, with the capacity to produce more than 700,000 vehicles per year, is the second-leading African manufacturer of vehicles. The model was developed at the Morocco Technical Center in Casablanca. This represents a significant technological shift for the country

[21] J.S. Gonzáles, "España pide una tasa en toda la UE para frenar la 'energía sucia' que llega de Marruecos", *El País*, May 25, 2019.

[22] International Energy Agency (IEA) (2020).

[23] F. Borsari, *Egitto: La grande scommessa sull'energia*, ISPI Commentary, ISPI, February 5, 2021.

[24] M. Tanchum (2020).

[25] M. Tanchum, *Morocco's "first in North Africa" electric car production is a European manufacturing gain over China*, Middle East Institute, September 3, 2021.

and a good example of potential economic synergies with the northern shore of the Mediterranean, with the EU planning to ban the sale of vehicles using the internal combustion engine by 2035. At the same time, Morocco could export electric vehicles to the rapidly expanding car markets in sub-Saharan Africa, thus consolidating its leadership in the green economy.

On the other side of the region, Egypt developed a partnership with Chinese automaker Dongfeng to jointly produce electric vehicles in the country, aiming for an annual production capacity of 25,000 electric cars.

Conclusion

Decarbonization policies and low-carbon technologies will shape the North African region in the future. The global energy transition will affect the distribution of power, relations between states, the risks of conflicts, and the social, economic, and environmental drivers of geopolitical instability.[26]

This transition will contribute to the transformation of North African societies in the coming decades. The decarbonization of their economies is urgent as the area will be one of the most affected on the planet by the consequences of climate change. The security and prosperity of the region will be severely impacted by global warming as the region already faces highly interconnected climate risks.

Morocco is the most advanced country in the region in terms of implementing plans for this energy transition. Along with Egypt, the country shares the role of regional leader. Both have developed significant projects in solar and wind energy, and are investing in climate diplomacy as a source of international legitimacy and standing. At the same time, investments in renewable sources of energy are attracting international energy companies to the region, thus contributing to the reinforcement

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[26] J.E. Viñuales, "Géopolitique de la transition énergétique", *Révue Européenne du Droit*, no. 2, Spring 2021.

of commercial ties with traditional and emerging players in the enlarged Mediterranean region. In particular, investments in renewable energy and energy partnerships are strictly linked with the international alliances of the two countries, reflecting continuities and discontinuities of their respective foreign policies.

The other countries of the region have not fully acknowledged the challenges of the energy transition, with the implementation of green strategies proceeding slowly and creating a limited amount of renewable installed power capacity. In the whole region, the development of renewable energy sources collides with the chronically dysfunctional energy sector, the degree of openness to foreign investments, reliable support mechanisms, and clear licensing procedures. In addition to this, renewable energy plays only a minor role in sectors other than electricity production, including the transportation sector.

The region's five countries are highly dependent on fossil fuels to meet their respective domestic demand – oil accounts for between 45% and 85% of consumption across North Africa[27] – and the role of hydrocarbons is slated to rise in the coming years. In spite of the notable advancements of the last decade, the role of renewables is still limited compared to their potential.

This energy transition across North Africa could be supported through the extension of energy interconnections between them and with European and African partners, through the use of existing gas pipelines to export green hydrogen from North Africa to Europe, and the implementation of a cross-border network of electricity interconnections between North African and sub-Saharan countries. This transition could open new opportunities for sustainable economic growth and regional integration. In this regard, the energy transition could prove to be a structural factor of political transformation in the region.

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[27] International Energy Agency (IEA) (2020).

4. North African Cities: Actors for Sustainable Development or Sites of Imported Urban Visions?

Hannah Abdullah, Karim Elgendy

The cities of North Africa have been the locus of human development in this unique region. As human settlements on the edge of the Sahara and on the banks of the Nile, they emerged in the few locations that provided enough water and biological capacity, and enjoyed a more moderate climate. Some of them capitalized on maritime trade on the Mediterranean while others benefited from trade links with sub-Saharan Africa.

Today, North Africa is an urban region, but its cities lack much of the economic, environmental, and social benefits that urbanization typically provides. Efforts to transform their urban form and infrastructure to become more sustainable have only just begun and are hindered by the slow pace of decentralization reforms; the efforts are, however, supported by the emerging political role of cities globally as a major actor for sustainable development.

Alongside these internal urban dynamics, powerful global forces are at play in the region, influencing its development model and shaping how some of its cities are evolving. These include African continental and Euro-Mediterranean cooperation, city associations, and partnerships with China under its Belt and Road Initiative (BRI).

These competing dynamics raise the question as to whether North African cities are in the process of becoming actors

driving sustainable development with their own transnational agency, or whether they are instead becoming sites for great power struggles and imported urban visions.

North African Urbanization Processes

There are two major urban clusters dominating North Africa: the Nile River cluster, a narrow linear strip of cities along the banks of the Nile River and within its delta in the section between Aswan, near the border with Sudan, and the Mediterranean coast; and the North Africa cluster, which includes cities and towns within the northern coastal strip extending from the Tunisian cities of Tunis and Sfax in the east to the Moroccan cities of Casablanca and Agadir in the west.

By the 1960s, the urban population in North Africa was estimated to be 34% of the total regional population, according to World Bank data. By 2019, it had grown by almost two-thirds to 56%, approximately the same level of urbanization as the global average.[1]

Morocco, Algeria, and Tunisia all experienced a steady increase in urbanization levels between 1960 and 2019, rising from a range of 29% to 37% to a range of 63% to 73%. Egypt and Libya, on the other hand, experienced a different trajectory in that period, according to United Nations (UN) Population Division data sets. Egypt's urbanization seems to have stalled since the late 1970s; Libya experienced rapid urbanization until 1984.[2]

The growth rate of the North African urban population has been consistently falling over the past six decades. The rate has been as high as 6.5% in Algeria and Libya, and as low as 2.5%

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[1] World Bank, "Urban Population (% of Total Population)", using data from the United Nations Department of Economic and Social Affairs (DESA), Population Division, "World Urbanization Prospects: 2018 Revision", accessed May 20, 2021.

[2] Ibid.

in Tunisia in 1960, according to World Bank data;[3] from 2015 to 2020, the rates in Algeria, Libya, and Tunisia fell to 2.46%, 1.68%, and 1.53%, respectively. The average rate, which stood at 2.19% from 2015 to 2020, is expected to continue falling according to projections by the UN Human Settlements Program (UN-Habitat), with the average rate dropping below 2% between 2025 and 2030.[4]

These regional urban population-growth rates consistently surpass the region's overall population growth rate. This confirms that the urban population growth has not been limited to natural demographic increases, but also was affected by the influx of rural-to-urban migrants.[5]

As a result, the number of agglomerations grew in all the countries of North Africa during the period between 1960 and 2015. In Libya, urban agglomerations grew from twenty-five to forty-six; in Tunisia, from twenty-four to eighty-nine; in Algeria, from seventy-two to 476; and in Morocco, from forty-nine to 167.[6] In Egypt, while the number of agglomerations grew from 284 to 1,061 during the same period, there are discrepancies in the tally of urban vs. rural due to Egypt's approach to designating urban areas according to their administrative status.[7]

As the number of agglomerations increased, the average distance between them shrank in almost all of the region's countries, falling from 40 km to 19 km in Algeria between

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[3] World Bank, "Urban Population Growth (Annual %)", using World Bank staff estimates based on data from the UN DESA, Population Division, "World Urbanization Prospects: 2018 Revision".

[4] UN-Habitat, *World Cities Report 2020: The Value of Sustainable Urbanization*, Nairobi, 2020.

[5] K. Elgendy and N. Abaza, "Urbanization in the MENA Region: A Benefit or a Curse?", Friedrich Ebert Stiftung website, February 10, 2020.

[6] Organisation for Economic Co-operation and Development (OECD)/Sahel and West Africa Club (SWAC), *Africa's Urbanization Dynamics 2020: Africapolis, Mapping a New Urban Geography*, West African Studies, Paris, OECD Publishing, 2020

[7] P. Beaumont, G. Blake, and J.M. Wagstaff, *The Middle East: A Geographical Study*, London, Routledge, 2016.

1960 and 2015, from 8 km to 5 km in Egypt (with the same caveat about Egypt's administrative designations applying here), from 42 km to 29 km in Morocco, and from 35 km to 20 km in Tunisia. Uniquely, Libya experienced the opposite, with average distances increasing from 45 km to 63 km during the same period.[8]

Urbanization is highly centralized in Egypt, Tunisia, and Libya with approximately one-fifth of the population residing in the capital city of each country. The Cairo metropolitan area is North Africa's only primate city,[9] with 47% of the urban population residing in the capital. In Tunisia, 28.5% of the urban population lives in Tunis, while 22.3% of Libya's urban population lives in Tripoli.[10] The primacy of the largest cities continues despite government efforts to steer urban development to smaller cities, and it creates an imbalance in the urban hierarchy and biases urban development toward larger cities.

In Algeria and Morocco, centralization is less pronounced. Algiers comprises 6.4% of Algeria's population, while the four major cities in Morocco (Casablanca, Rabat, Tangier, and Fès) combined represent 21.7% of the national population.[11]

North Africa's urbanization levels appear to be halfway between the levels of its neighbors, the European Union (EU) and sub-Saharan Africa. While the urban share of population in North Africa increased from 34% to 56% over the last six decades, the urban share of population in sub-Saharan Africa – the least urbanized region in the world[12] – went from less than

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[8] OECD/SWAC (2020).

[9] According to the UN DESA, Population Division, a city will be considered to be the primate city of a country when it accounts for at least 40% of the urban population in a particular year. For information on primate cities see: UN DESA, Population Division, "World Urbanization Prospects: 2018 Revision"…, cit. For data see: UN Economic and Social Affairs, *The World's Cities in 2018: Data Booklet*, 2018.

[10] UN Economic and Social Affairs (2018).

[11] Ibid.

[12] This comparison includes North America, South America/Caribbean, Europe,

15% of total population to approximately 41%, and its urban population continues to grow at an average rate of 2.6%. The highly urbanized EU, on the other hand, has augmented its urban population, which was 56% of the population in 1960, to 74% in 2019. However, the EU's urban population growth fell to less than 0.2% in the late 1990s and has remained at this low level of growth since then, with the exception of 2011, when its urban population shrank.[13]

The Potential Benefits of Urbanization and Barriers to Urban Sustainability

The spatial concentration of material flows, resources, energy and water in cities is today widely recognized as a powerful driver of the transition to sustainable development.[14] Cities have the potential to deliver economic, social, and environmental benefits to their residents, created by agglomeration, economies of scale, and the network effect. For example, the proximity of city residents to each other and to workplaces and services (created by agglomeration) supports and creates the conditions for efficient energy use and lower mobility costs. Similarly, economies of scale produce cost advantages for products and services provided in cities, which support higher economic efficiency. The network effect keeps attracting financial and human capital.[15]

Some of these benefits have materialized in North Africa. In the region's cities, gross domestic product (GDP) per capita is

Oceania, and Asia. See World Bank, "Urban Population (% of population)", based on UN DESA, Population Division…, cit., accessed August 11, 2021.

[13] World Bank, "Urban Population (% of Total Population)"…, cit; and World Bank, "Urban Population Growth"…, cit.

[14] S. Parnell, "Defining a Global Urban Development Agenda", *World Development*, vol. 78, 2016, pp. 529-40.

[15] K. Elgendy, *Post-Oil Cities in the MENA Region: Lessons from Doha*, Commentary, Notes from the Field series, Center for Strategic and International Studies (CSIS), March 18, 2021.

generally higher than the respective national average. Though these cities have been providing basic services to residents, the region has high levels of housing shortages, especially for middle- and low-income earners.[16] Egypt has the largest housing backlog, at 3.5 million units, followed by Algeria, with a shortfall of a 1.2 million units.[17] In addition, a substantial percentage of the region's urban population continues to live in slums, despite significant improvements in housing. In Morocco and Tunisia, the portion of urban populations living in slums is 9% and 8%, respectively.[18]

So far, cities of North Africa have failed to capitalize on and benefit from the potential of urbanization – despite their natural resource scarcity and the evident need to improve resource efficiency.[19] Many have instead developed what Egyptian sociologist Saad Eddin Ibrahim described as "urbanization without urbanism", a condition where the urban qualities of the city do not increase at the same rate as its size.[20]

The limited ability of North African cities to reap the benefits of urbanization is related to other trends that undermine the potential of urbanization. Rapid urbanization is partly responsible for some of these trends, such as the concentration of populations in one or two major cities, the growth of informal areas and urban systems, and the tendency of new migrants from rural areas to concentrate in city enclaves or "urban villages". Other trends are unrelated to rapid urbanization and can instead be attributed to the process of urban dedensification, where the city's urban footprint expands

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[16] Z. Sayed, *2019 Housing Finance Yearbook: North Africa Regional Profile*, Center for Affordable Housing Finance in Africa, 2019.

[17] E.-h. Bah, I. Faye, and Z.F. Geh, *Housing Market Dynamics in Africa*, London, Palgrave MacMillan, 2018, p. 6.

[18] UN-Habitat (2020).

[19] Elgendy (2021).

[20] S.E.M. Ibrahim, "Over-Urbanization and Under-Urbanism: The Case of the Arab World", *International Journal of Middle East Studies*, vol. 6, no. 1, 1975, pp. 29-45.

at a faster rate than its population.[21] Despite North African cities currently having a good overall density of almost nine thousand persons per square kilometer (or ninety persons per hectare), which is a good basis for sustainable urbanism, their urban extents have on average grown by an annual rate of 4.5%. This rate significantly exceeded their annual population growth rate of 3.1% and resulted in an overall reduction in urban density, including in large cities such as Cairo, Marrakech, Algiers, and Alexandria.[22] Added to this are highly centralized administrations and incomplete decentralization reforms that have hampered local capacity building, and efforts to address urban expansion and rising demands for services, especially water, energy, and waste management.

Weak urban planning and infrastructure

The cities of North Africa face several infrastructure challenges that hinder their ability to transition toward environmental sustainability. Of these, transportation networks have the largest environmental impact and repercussions. They are designed for personal vehicles, largely lack comprehensive, accessible, and reliable public transportation, and mostly do not allow for active mobility such as walking and cycling.

The availability of public transportation varies widely among North African countries. The average proportion of urban population living within convenient walking distance of public transport (based on available data) in Morocco is 48%, the highest in the region, followed by Algeria, with an average of 37%, and Tunisia, 33.8%. Egypt, on the other hand, has a much lower proportion of urban population with easy access to public transport, with the average estimated at 21.8%. No

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[21] Elgendy (2021).

[22] UN-Habitat (2020); and "The Atlas of Urban Expansion" (data), (website of) Monitoring Global Urban Expansion Program, an initiative of New York University's Marron Institute of Urban Management and Stern School of Business, in partnership with UN-Habitat, and the Lincoln Institute of Land Policy.

data about the availability of public-transportation networks in Libya were available.[23]

Among these cities, the highest proportion within convenient walking distance of public transport is in Marrakech (74.8%), followed by Casablanca (66.5%), Tunis (48.5%), Algiers (48%), Oran (45%), Fès (39.1%), Alexandria (36%), and Cairo (21.2%). By comparison, no city in the United Kingdom or France has a proportion less than 85%, while in London and Paris it is estimated at 94.8% and 97.7%, respectively.

Poor urban transportation networks, the lack of nonmotorized mobility, and increased use of private vehicles have all resulted in increased energy usage per trip, carbon emissions, air pollution, and traffic congestion. Having said that, car ownership in cities of North Africa remains low, with 315 vehicles per one thousand persons in Algiers, 220 vehicles in Constantine, 215 in Casablanca, 106 in Cairo, and seventy-three in Alexandria.[24]

This challenge is compounded by other urban trends that reduce walking and cycling, such as the growth of the average urban block size in cities such as Alexandria, Cairo, Marrakech, and Algiers.[25] It also is made worse by the poor provision of open public space as a percentage of total urban area. The share of urban area allocated to open public space is 3.6% in Tunisia, 2.66% in Algeria, 2.1% in Morocco, and 1.3% in Egypt.[26] To put this into perspective, it compares to an average of 12% in European cities.[27]

Notably, national governments have been enacting legislation and developing regulations to improve energy efficiency in the built environment across the region. This activity includes mandatory energy-efficiency regulations for buildings in

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[23] UN-Habitat (2020).

[24] International Association of Public Transport (UITP), *MENA Transportation Report 2019*, UITP, 2019.

[25] "The Atlas of Urban Expansion"…, cit.

[26] No data are available for Libya; source: UN-Habitat (2020).

[27] UN-Habitat data cited in "Public Spaces in the Middle East: No Bed of Roses", *The Economist*, June 11, 2016.

Algeria, Egypt, Morocco, and Tunisia; voluntary energy-efficiency regulations in Algeria, Morocco, and Tunisia; and the development of green building certification systems as market transformation tools across the region. These systems include locally developed ones such as TARSHEED in Egypt, as well as international ones such as Haute Qualité Environnementale (HQE), Leadership in Energy and Environmental Design (LEED), and EDGE. It also includes the development of fuel-efficiency standards for light duty vehicles in Algeria (equivalent to the €3 standard) and Egypt (below €3 level), as well as fuel-efficiency standards for buses in Tunisia and Egypt (at €3 levels).[28]

National governments and cities also have been increasingly investing in new public transportation networks to improve their energy efficiency, reduce air pollution, and cut carbon emissions. Electric buses were introduced in Alexandria and Tunis, while electric bus rapid transit (BRT) was introduced in Marrakech. Bike-sharing schemes have been introduced in Gouna in Egypt, as well as Marrakech. There are projects to develop metro networks in Cairo and Oran; tram networks in Casablanca, Rabat-Salé, Oran, Constantine, Tunis, Sfax, and Alexandria; and BRT systems in Agadir, Casablanca, Algiers, Sfax, and Cairo.[29]

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[28] Euro emission standards are progressively stringent exhaust pollution standards for new vehicles sold in the EU and European Economic Area (EEA) countries (i.e., Iceland, Liechtenstein, and Norway plus the EU members). They set limits on the emission of nitrogen oxides (NOx), total hydrocarbon (THC), nonmethane hydrocarbons (NMHC), carbon monoxide (CO) and particulate matter (PM). The latest standard, €6, was first used in September 2015 and reduces some pollutants by 96% compared to the 1992 limits, while €3 came into effect in January 2001.

[29] UITP (2019).

The long, hard road toward a new socioeconomic contract

As the region's centers of economic growth, cities provide opportunities for social mobility and continue to attract rural populations seeking employment. According to McKinsey & Company data, GDP per capita is generally higher in cities of North Africa than the corresponding national average. In some cases, the difference is significant: the GDP per capita in Tunis is twice that of Tunisia, and the same applies for Tripoli compared to Libya, and for Cairo compared to Egypt. The GDP per capita in Casablanca is more than twice that of Morocco.[30]

Yet, overall, the relationship between urbanization and economic growth per capita in the region is below what could be expected based on the world average.[31] One reason for this is the spatial fragmentation of North African cities.[32] Low-density development and developed areas separated by areas of underdeveloped land have only impeded access to infrastructure and services, and widened the distance between where people live and where jobs are available. Urban fragmentation also increases segregation and reproduces inequality by, for example, increasing the privatization of public space and process of gentrification while reducing the ability of the urban poor to access public transport to seek education, economic opportunities, and healthcare.[33]

The socioeconomic discontent that spurred the Arab Spring revolts of 2011 emerged in urban centers where people had suffered the negative consequences of unsustainable patterns of urbanization for over two decades. Several factors drove the

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[30] *Urban World*, iOS version 1.6, McKinsey Global Institute, 2017.

[31] World Bank, *Convergence: Five Critical Steps toward Integrating Lagging and Leading Areas in the Middle East and North Africa*, Washington, DC, World Bank, 2020.

[32] Ibid.

[33] In Egypt and Morocco, for example, postneonatal mortality in informal settlements (i.e., slums) is twice that in nonslum areas. See UN-Habitat, "The State of North African Cities", chapter two in *The State of African Cities 2010: Governance, Inequality and Urban Land Markets*, UN-Habitat, 2010.

collective call for political reform including what some have called the "urbanization of poverty", associated high levels of urban unemployment, and inequality.[34] Yet while Tunisia, Libya and Egypt witnessed the unraveling of their tired socioeconomic contracts, in which a dominant public sector stifled economic growth and social mobility, only Tunisia and to some degree Morocco saw a more just social compact begin to emerge in the aftermath, with unknown durability. Unsurprisingly, this lack of change and improvement in living conditions in many parts of North Africa has resulted in low life-satisfaction levels.[35]

Today, North African cities are far from achieving sustainable and inclusive economic growth critical to improving living standards for all by creating decent work opportunities with a fair income, security in the workplace, and social protection. Unemployment and poverty levels remain high across urban centers, especially among youth, women, and rural-to-urban migrants; the combination of the COVID-19 pandemic and the collapse in oil prices has further aggravated the economic situation in many of the region's cities. While low life satisfaction was one of the main drivers of the 2011 civic movements, life satisfaction today is estimated to be at an even lower level than it was a decade ago.[36]

Incomplete decentralization reforms

Decentralization reforms over the past decade promised more competencies, resources, and capacity at the city level to enhance social services that can foster inclusion and provide better urban planning that promotes density and spatial connectedness.

In the aftermath of the Arab revolts, the new and old regimes in Morocco, Tunisia, Libya, and Egypt initiated reforms to

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[34] S.I. Bergh, "Decentralisation and Local Governance in the MENA Region", in *IEMed Mediterranean Yearbook 2010*, European Institute of the Mediterranean, 2010, p. 254.

[35] F. Belhaj and N. Mohammed, "MENA: The Time to Act Is Now", World Bank (blog), October 15, 2020.

[36] Ibid.

promote decentralization in an effort to address the dwindling confidence in state-society relations and respond to two of the protesters' principal demands: "more participative governance and more efficient and accountable public services".[37] By contrast, Algeria, where no protests took place in 2011, maintained a highly centralized state.

Some governments are only slowly and partially implementing decentralization reforms. They are enshrined in the new constitutions of Tunisia (2014), Libya (2012), and Egypt (2014), and in the constitutional reforms introduced in Morocco (2011). In Egypt and war-torn Libya, despite constitutional language, no such reform is in the works. In Egypt, for example, election laws for local authorities have not been enacted, and local elections have not been held since 2008. In addition, local capacity building and decision-making is often hampered by what Silvia I. Bergh describes as "a deconcentrated rather than decentralized governance system".[38] This type of system consists of unfunded mandates, weak fiscal capacity, high dependence on transfers from central governments, and municipalities that serve administrative functions without having any real involvement in political decision-making.

Decentralization is a long-term process that not only requires changes in laws and government systems, but also a new political culture and societal self-understanding. Local trust in democracies is not an automatic consequence of decentralization; trust must be nurtured through a commitment to transparency, accountability, and citizen participation.[39] In

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[37] A. Houdret and A. Harnisch, "Decentralisation in Morocco: A Solution to the 'Arab Spring?'", *The Journal of North African Studies*, 2018, pp. 953-60.

[38] S.I. Bergh, *Building a Euro-Mediterranean Partnership with, not for, Cities*, CIDOB Briefings 24, Barcelona, Centre for International Affairs (website), 2020.

[39] V.E. Arkorful, B.K. Lugu, A. Hammond, and I. Basiru, "Decentralization and Citizens' Participation in Local Governance: Does Trust and Transparency Matter? – An Empirical Study", *Forum for Development Studies*, vol. 48, no. 2, 2021, pp. 199-223.

Tunisia and Morocco, some local authorities are experimenting with new governance arrangements that provide more opportunities for engagement and transparency. A successful example is the Municipal Cooperation for Local Participatory Governance in the Maghreb Region (CoMun) project, led by Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ, the German development agency), from 2016-19, and which supported municipalities in both countries in developing mechanisms to strengthen local democracy.[40] However, oftentimes the new participatory infrastructure created by municipalities is "cosmetic" and based on nonbinding consultation rules.[41] While trust in local authorities is increasing in some parts of Morocco and Tunisia, in most of the region, local governments continue to lack legitimacy in the eyes of their citizens.

The Emerging International Political Role of Cities

Over the past two decades, global urbanization has bestowed unprecedented relevance on cities in world politics.[42] While North African cities have moved on the margins of this trend, they are showing signs of emerging transnational political agency. This new role is manifesting particularly in the context of international development agendas that recognize the opportunities of urbanization and support North African cities' socioeconomic and infrastructure development.

On the one hand, there are the global agreements adopted in the wake of the UN 2030 Agenda, which have promoted

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[40] *Strengthening Local Development and Democracy, Maghreb*, GIZ, accessed July 28, 2021.

[41] See Bergh (2020).

[42] M. Acuto, *Global Cities, Governance, and Diplomacy: The Urban Link*, Milton Park (UK), Routledge, 2013; S. Curtis (ed.), *The Power of Cities in International Relations*, Milton Park (UK), Routledge, 2014; and H. Abdullah (ed.), *Cities in World Politics: Local Responses to Global Challenges*, Barcelona, CIDOB, 2019.

an "urban turn" in sustainable development,[43] and advocate for urbanization as a force of positive transformation that can accelerate change across the various dimensions of development and in dialogue with citizens.[44] African continental public policy discourses and cooperation frameworks between the EU and Southern Mediterranean countries, such as the Union for the Mediterranean (UfM), significantly contributed to formulating this approach. In their regional forums and programs they have subsequently sought to provide a greater role for North African local governments and urban stakeholders.

More recently, North African cities also have become important actors in a second, alternative development approach driven by China's ambitious BRI, first announced in 2013. The BRI route, if realized as promoted, positions North Africa as a nodal region connecting Asia, Africa, and Europe. Large-scale urban infrastructure projects are a major pillar of this endeavor. In contrast to the holistic logic of the UN paradigm of sustainable urban development, the BRI's infrastructural approach is primarily geared toward turning North African cities into trading and economic hubs on China's modern-day Silk Road.

Both agendas influence how North Africa is tackling its urban development challenges, but they represent competing urban visions. The coming decade will be vital in determining how North African cities emerge from these contrasting conceptions and associated geopolitical contestations. Will they become mere sites of great power struggles and imported urban visions and forms? Or will these cities be able to assert their own transnational agency and sustainable urban-development logic?

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[43] These agreements include the New Urban Agenda (on housing and sustainable urban development, adopted October 2016 in Quito, Ecuador), the Paris Agreement (on climate change, December 2015), and the Sendai Framework for Disaster Risk Reduction (to prevent new and reduce existing disaster risks, March 2015 in Japan).

[44] Parnell (2016).

Toward a new urban agenda for North Africa

The increasing urbanization in Africa has led to a "southern rethinking of cities".[45] While most African governments were in denial about urbanization until the turn of the XXI century, policy makers today widely view the continent's urban transition as critical for a prosperous and sustainable African future. The African Union's (AU) long-term strategic vision for the continent, Agenda 2063 – which was published in draft form in 2013 and served as a direct input to the UN's 2015 Sustainable Development Summit – marks a turning point in this regard.[46] Exemplifying the new African urban optimism, the agenda seeks to transform the continent's cities into "hubs of cultural and economic activities, with modernized infrastructure, [where] people have access to all the basic necessities of life including shelter, water, sanitation, energy, public transport, and ICT", referring to information and communications technology.[47]

Similar to the AU, the EU and the UfM, an intergovernmental organization of forty-two member states from Europe and the Mediterranean Basin, have placed a focus on sustainable urban development in North Africa and the EU's wider southern neighborhood over the past two decades. However, the EU and UfM have gone a step further, recognizing cities not only as strategic sites of development intervention, but increasingly as transnational actors and cooperation partners. Both the EU and UfM have made efforts to give local authorities a greater role in Euro-Mediterranean cooperation by strengthening multilevel governance mechanisms. For example, in 2010 the European Committee of the Regions launched the Euro-Mediterranean Regional and Local Assembly (ARLEM), through which

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[45] E. Pieterse, S. Parnell, and G. Haysom, "African Dreams: Locating Urban Infrastructure in the 2030 Sustainable Development Agenda", *Area Development and Policy*, 2018, pp. 149-69.

[46] E. Pieterse, "Embedding National and Urban Policies in Africa," in H. Abdullah (ed.), *Cities in World Politics*, Barcellona, CIDOB, 2019.

[47] African Union, *Agenda 2063: The Africa We Want*, popular version, second edition (Addis Ababa: African Union, 2015).

subnational authorities from both shores can engage in political dialogue with the EU and UfM.[48] Building on this and other initiatives, the UfM in 2017 adopted an Urban Agenda, its first roadmap to establish a more integrated approach to policies concerning sustainable urban development in Mediterranean countries and to give local governments a greater role in policy design and implementation.

However, the political voice and leverage of cities in forums for Euro-Mediterranean cooperation is still limited. This is partly due to the intergovernmental setup of the UfM and related cooperation frameworks, which impede effective multilevel processes and decision-making. Unfortunately, platforms like ARLEM and the UfM Urban Agenda have changed little in this regard. Another reason is that urban cooperation projects are all too often relegated to technical portfolios, impeding the recognition that urbanization today impacts all dimensions of Euro-Mediterranean relations and should be treated as a transversal political challenge.

By contrast, North African cities are taking on a more active role in subnational channels of cooperation for sustainable development. Compared with the stagnant Euro-Mediterranean intergovernmental process, cooperation at the city level has been growing.[49] Fostering this are regional associations of local governments like MedCities, the network of Middle East and North Africa (MENA) representatives involved in the Cities Alliance global partnership, the city-level work of the World Bank's Center for Mediterranean Integration (CMI), as well as European national development agencies operating in North Africa, like Germany's GIZ, which have all expanded over the past decade. They are proving that city-level cooperation can address many of the above-discussed barriers to urban

[48] Bergh (2020).

[49] H. Abdullah, "How Can Cooperation between and through Cities Revive Euro-Mediterranean Relations?", in H. Amirah-Fernández, C. Descamps, and E. Soler i Lecha (eds.), *Creating Euro-Mediterranean Bonds that Deliver*, Madrid, Friedrich Nauman Foundation, 2021.

sustainability, tackling issues ranging from energy efficiency to urban transport and local democracy.

North Africa's Belt and Road Cities

China has been strategically building relations with North African countries as part of its BRI. Beijing has had BRI partnership agreements in place with Egypt and Algeria since 2014, and with Morocco since 2016; it signed memorandums of understanding with Libya and Tunisia in 2018.[50]

Mounting political tensions with the EU and other Western partners have been a catalyst for North African countries' willingness to engage in diplomatic, economic, and security relations with China, which promises economic development without political interference or normative requirements. Its development model, which "seeks to combine authoritarianism with economic growth", appears to resonate with many regimes in the region.[51]

In contrast to the US-led liberal model's development approach, the BRI-driven urbanization prioritizes "infrastructure, supply chain management, legal zoning techniques, and connectivity" over "finance, financial service, and the intermediary relationships needed to further such exchange".[52] It also prioritizes surveillance over the freedoms that have come to be associated with urban life.

BRI urban-development patterns first and foremost follow Chinese commercial interests. Simon Curtis and Maximilian Mayer identify two dominant urban forms promoted by the BRI: "urbanizing corridors as subnational and (often)

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[50] A. Abdel Ghafar and A.L. Jacobs, *Beijing Calling: Assessing China's Growing Footprint in North Africa*, Policy Briefing, Brookings Doha Center, September 2019; and F. Wehrey and S. Alkoutami, "China's Balancing Act in Libya", Lawfare (blog), Lawfare Institute in cooperation with the Brookings Institution, May 10, 2020.

[51] Abdel Ghafar and Jacobs (2019), p. 1.

[52] I. Klaus and S. Curtis, "Cities of the New Silk Roads", *Diplomatic Courier*, November 27, 2019.

transborder development models", and "the smart surveillance city".[53] In China's venture into Northern Africa, the former type of development project dominates. However, there are other construction projects that fall into the latter category, or projects that are not directly related to BRI infrastructure and are geared toward strengthening political, trade, and cultural ties with North African countries.

Egypt is the focal point of China's North African policy. It is the most important North African country in the BRI because of its geographic position as a passageway into Africa and Europe, China's largest export market. Egypt's Suez Canal is especially crucial for the transport of Chinese goods. China's most high-profile project in Egypt is the New Administrative City (NAC), located 45 kilometers east of Cairo, roughly halfway between the capital and the Suez Canal. Chinese banks are financing approximately 85% of the US$3 billion project and the Chinese State Construction and Engineering Company (CSCEC) is building the city's Central Business District.[54]

In Morocco, Chinese-financed urban infrastructure projects are mostly industrial and free trade zones and financial centers, including Casablanca Finance City and the Tanger Med port complex, where a regional logistics center for Chinese businesses will be set up.[55] In close proximity to the new port, the planned Mohammed VI Tangier Tech City has been described as "the largest Chinese investment project in North Africa".[56] This technology manufacturing hub has been valued at US$10 billion and dubbed the Shanghai of North Africa.[57] Construction started in 2019 on the new smart city that will

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[53] S. Curtis and M. Mayer, *Belt and Road Cities Begin to Find Their Form*, CIDOB Opinion 630, 2020.

[54] S. Mathews, "The Competition for Egypt: China, the West and Megaprojects", *Al-Jazeera*, March 15, 2021.

[55] Abdel Ghafar and Jacobs (2019), p. 4.

[56] "Tangier: King Mohammed VI Launched $1 Billion Chinese Investment Project", *Morocco World News*, March 20, 2017.

[57] B. Hamama, "Morocco's Chinese-Funded Tech City: The Shanghai of North-Africa?", *Il Giornale Dell' Architectura*, December 29, 2020.

feature several industrial zones and host two hundred Chinese companies – strategically located just a few kilometers from the Strait of Gibraltar.

Algeria holds the record as China's most long-standing economic partner in North Africa. Relations between the two countries date back to the Algerian War of Independence, during which China provided political and military support. Today, most of Algeria's imports come from China.[58] At the same time, Chinese companies are firmly established in the Algerian energy, construction, and housing sectors, and have been commissioned with key public development projects.[59] The capital, Algiers, is today defined by infrastructure projects that have been built by the Chinese, including a new terminal at the city's Houari Boumediene Airport, the East-West Highway, and low-cost housing complexes.[60] Other projects that are of a more symbolic nature and geared to strengthening political and cultural relations include Chinese construction of the Ministry of Foreign Affairs, the Algiers Opera House, and the Great Mosque of Algiers.

Chinese investments in Libya have largely been put on hold as a result of the civil war and subsequent instability. However, Chinese firms are currently exploring postconflict reconstruction opportunities in the country.[61]

North Africa's BRI cities and other urban projects are primarily strategic sites to improve connectivity between Asia, Africa, and Europe and drive economic growth. They tend to take the form of megaprojects that consist of new developments rather than building on existing urban and socioeconomic fabrics, and are negotiated at the national, political, and diplomatic level

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[58] Abdel Ghafar and Jacobs (2019), p. 4.

[59] J. Calabrese, *'The New Algeria' and China*, MEI@75, Middle East Institute, January 26, 2021.

[60] Notably, Chinese construction businesses completed these development projects on a "service-provision contractual basis", meaning they hold no ownership of them and cannot be considered investors; see Ibid.

[61] Abdel Ghafar and Jacobs (2019), p. 4.

with little or no involvement of local actors. Thus, while the BRI has boosted the strategic geopolitical relevance of North African cities, it leaves little room for the political agency of local authorities, stakeholders, and citizens.

Outlook: The Future of Cities in the Region

Scanning the horizon of the North African urbanization processes, there are early signs that many regional cities are slowly transitioning toward more sustainable development pathways. Yet the conditions necessary for these transformations to be fully effective and accelerate as needed – including enhanced decentralization, local institution and capacity building, and stronger mechanisms for citizen participation – are still weak. Just like this decade is a make-or-break time for climate and sustainable development, it is an important decade for setting the trajectory of North African cities. The next few years will be critical in putting regional cities on track toward sustainability and resilience in order to come closer to meeting the 2030 targets of the UN Sustainable Development Goals and the Paris Agreement.

As shown in this chapter, many global players and international funders – from the EU to China but also the United States – are involved in shaping regional cities' development. While some of this support and associated investment are reinforcing unsustainable urban development trends (especially many of the BRI megaprojects), much of it has had a positive impact. To become more sustainable and resilient, North African cities will need to formulate their own locally contextualized pathways toward a better future. External partnerships, financing, and knowledge exchange are necessary for this, but regional cities could also greatly benefit from revalorizing their urban heritage and identity, and learning from their own urban traditions, local environments, and practices of resource conservation and environmental adaptation.

5. A New Demographic Opportunity Approaches: Will North Africa (Again) Fail to Catch It?

Nader Kabbani, Nejla Ben Mimoune

Between 1980 and 2010, the youth population in North African countries swelled. The share of 15- to 24-year-olds in the overall population peaked at 21% in 2005, compared to a global average of 16%. This demographic "youth bulge" placed pressures on these countries' education systems and labor markets as large numbers of young people left school to look for work.

While such demographic waves create challenges, they also present historic opportunities for the countries experiencing them. If these countries' economies are able to create enough new jobs for their young people, they would have a relatively large workforce supporting a relatively small population of nonworkers for a period of time. This so-called demographic dividend spurs greater savings, investment, and economic growth. A well-leveraged demographic dividend is thought to have played a role in supporting the growth of East Asian economies during the 1970s and 1980s.[1]

Unfortunately, the economies of North Africa failed to create enough decent jobs and economic opportunities during the youth bulge that peaked fifteen years ago. They also failed to

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[1] T.M. Yousef, "Macroeconomic Aspects of the New Demography in the Middle East and North Africa", in *Proceedings of the Annual World Bank Conference on Development Economics,* 2000.

provide their young people with the skills and resources they needed to access the opportunities that did exist, or the space to create new opportunities of their own. As labor force pressures increased, so did youth unemployment rates, averaging 25% since 1991, around twice the global average.[2]

Delays in the transition of young North Africans' to work has led to delays in other dimensions of adulthood: securing a home, getting married, and starting a family. Unable to realize their goals and dreams at home, over half the region's youth have expressed a desire to migrate, a high share by global standards. Though many do migrate, often risking their lives in the process, most are not able to leave. Those who remain and lack meaningful work become disillusioned, demoralized, and depressed – creating conditions ripe for social unrest. In 2010, the frustration and self-immolation of a Tunisian street vendor sparked waves of protests across the region demanding better economic opportunities and greater political inclusion. Social unrest continues to this day, even in Tunisia, the one North African country that has successfully transitioned to democracy.

While North African countries missed a precious opportunity, a second one is coming. A smaller youth bulge, composed of the children of the first wave, will hit the region between 2025 and 2040. North African countries need to move swiftly to reap the benefits of this second wave or again suffer the consequences of wasted youth potential and social unrest. There is an added sense of urgency this time: automation and digitalization are transforming the world of work. These trends hold the promise of economic rewards (e.g., increased productivity and economic growth) for countries that can take advantage of them, and the threat of being left behind for those that cannot.

The twin opportunities – one demographic, the other technological – call for North African countries to make three decisive reforms:

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[2] World Bank, "Unemployment, youth total (% of total labor force ages 15-24) (modeled ILO estimate)-World, Middle East & North Africa", World Development Indicators, accessed June 16, 2021.

- unshackle and support the economy, enabling the private sector to become an engine of growth and job creation;
- reform the education system to provide skills needed to survive and thrive amid digitalization, automation, and globalization;
- create space for young people to become civically engaged, able to air grievances, and seek redress for injustices.

This chapter addresses each of these issues in turn, but first it unpacks the reasons why North African economies failed to create decent jobs and unlock the potential of their young people during the initial demographic wave.

Demographic Challenges: A Missed Opportunity

During the 1960s and 1970s, the countries of North Africa expanded public health services and succeeded in substantially reducing infant and child mortality rates. However, social norms were slow to adapt, and fertility rates remained high for some time, as families continued to have large numbers of children. The gap in timing between the decline in infant mortality and fertility rates resulted in a demographic wave that has been moving through the populations of North Africa since then. The wave passed through the youth age group between 1980 and 2010, resulting in a demographic youth bulge (Figure 5.1).[3] During these years, youth represented a larger share than usual of the population, placing pressure first on education systems and then on labor markets as large numbers of young people left school to look for work.[4]

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[3] ME stands for Middle East (excluding Gulf Cooperation Council member states); LAC: Latin America and the Caribbean; SSA: Sub-Saharan Africa; EA: East Asia; and SEA: Southeast Asia.

[4] D. Beck and P. Dyer, "Demographic Transitions across the Middle East and

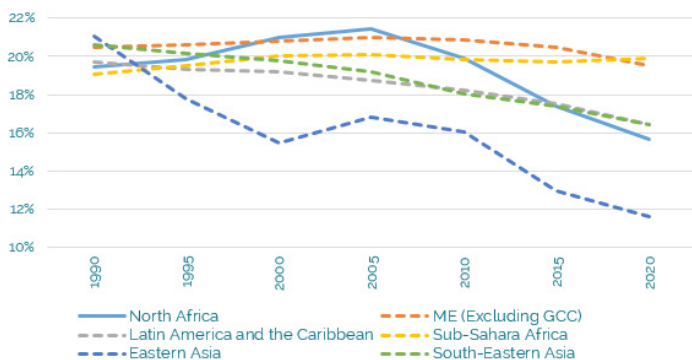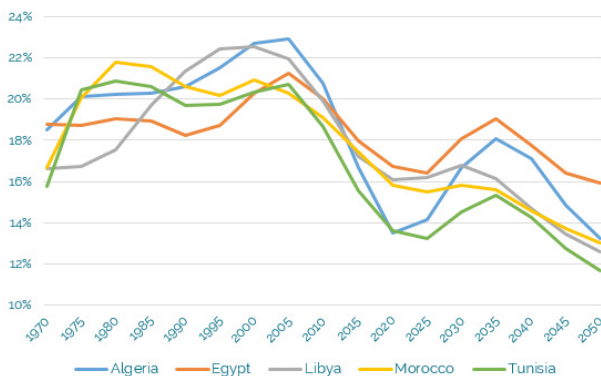Fig. 5.1 – Youth (15-24) share of the overall population
by region

Fig. 5.2 – Youth (15-24) share of the overall population
by country

Source: UN World Population Prospects 2019, accessed June 7, 2021.

North Africa", in E.A. Sayre and T.M. Yousef (eds.), *Young Generation Awakening: Economics, Society, and Policy on the Eve of the Arab Spring*, Oxford, Oxford University Press, 2016, pp. 16-34; and T.M. Yousef, "Youth in the Middle East and North Africa: Demography, Employment, and Conflict", in B.A. Ruble, J.S. Tulchin, D.H. Varat, and L.M. Hanley (eds.), *Youth Explosion in Developing World Cities: Approaches to Reducing Poverty and Conflict in an Urban Age*, eds. Woodrow Wilson International Center for Scholars, 2003, pp. 9-24.

Unfortunately, when labor force pressures increased during the 1980s and 1990s, North African economies failed to create enough decent jobs for their youth. Initially, North African economies relied on state hiring. In 1975, the public sector absorbed 60% of educated, labor-market entrants in Algeria, 75% in Egypt, and 77% in Tunisia.[5] However, as demographic pressures mounted and educational attainment increased, the numbers of young people seeking government jobs continued to rise. In the end, these state-led employment policies proved to be unsustainable. By 2010, the share of educated entrants hired by the public sector had dropped to 50% in Algeria, 25% in Egypt, and 32% in Tunisia.[6] While public-sector employment in the region remained high by global standards, it was not enough to provide jobs for all who wanted them. North African states then looked to the private sector to create more jobs.

During the 1980s and 1990s, North African countries attempted to reform their economies and allow a greater role for the private sector to become the engine of economic growth and job creation. However, these reforms largely benefited political elites who controlled state resources and used state instruments to expand their privileges. Indeed, overregulation of the private sector allowed politically connected firms to tilt the playing field to their advantage, creating even more opportunities for rent-seeking and cronyism. Thus, economic reforms stifled growth and job creation in the formal private sector, leading young people to queue for opportunities and forcing many to take jobs in the unregulated informal economy, with lower wages, limited benefits, and fewer opportunities for career advancement.

The inability of North African economies to create enough jobs, led to high rates of unemployment among the region's youth. Since the 1990s, youth unemployment rates in the Middle East and North Africa (MENA) have been among the

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[5] R. Assaad and G. Barsoum, "Public Employment in the Middle East and North Africa", IZA World of Labor (website), Institute of Labor Economics, 2019.
[6] Ibid.

highest in the world, ranging between 23% and 27%, while the global average has been 11% to 15% (Figure 5.3). The latest figures put youth unemployment at 39% in Algeria (Figure 5.4) and 35% in Tunisia, both in 2017. Morocco and Egypt have had lower rates, at 22% in 2016 and 19% in 2019, respectively, yet both remain well above the global average of 15%. Notably, Egypt's 19% rate represented a sharp decline from 32% in 2014. In contrast, rates in Morocco and Algeria have been climbing since 2010, and Tunisia's rate remains above pre-Arab Spring levels.[7] In conflict-devastated Libya, the rate was 49% in 2012 and recent estimates put it higher still.

Fig. 5.3 – Youth unemployment rates and trends by region (2010-2019)
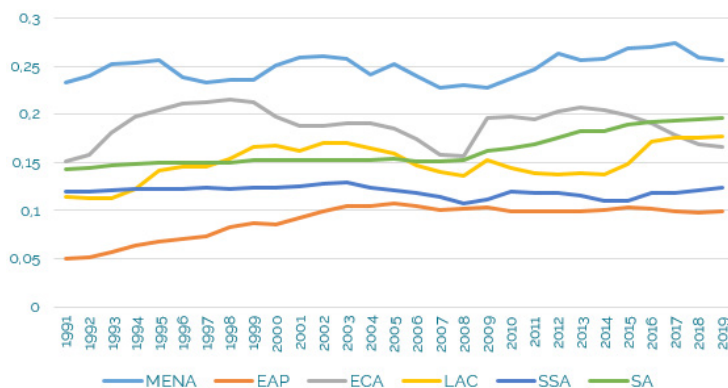
Source: World Bank, "Unemployment, youth total (% of total labor force ages 15-24) (modeled ILO estimate) - World, Middle East & North Africa, Europe & Central Asia, South Asia, Latin America & Caribbean, Sub-Saharan Africa", World Development Indicators, accessed June 16, 2021.

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[7] World Bank, "Unemployment, Youth Total (Percent of Total Labor Force Ages 15 to 24) (National Estimate): Morocco, Algeria, Tunisia, Libya, Egypt, Arab Rep., Sudan", World Development Indicators, International Labour Organization (ILO) (data), accessed June 15, 2021.

FIG. 5.4 – YOUTH UNEMPLOYMENT RATES AND TRENDS
BY COUNTRY (2010-2019)
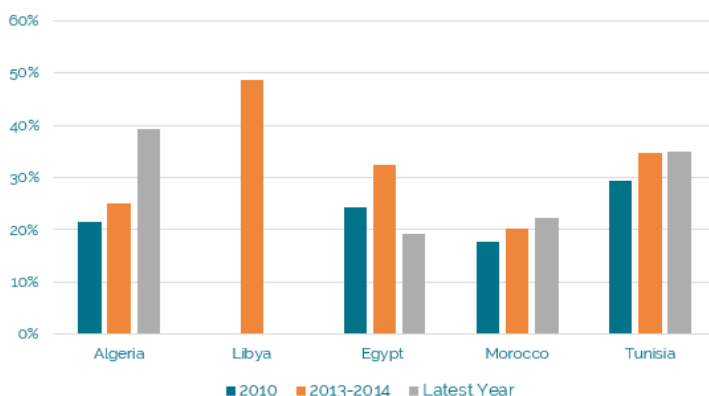
Source: World Bank, "Unemployment, Youth Total (Percent of Total Labor Force Ages Fifteen to Twenty-four) (National Estimate): Morocco, Algeria, Tunisia, Libya, Egypt, Arab Rep.", World Development Indicators, International Labour Organization (data), accessed June 16, 2021.

Unemployment is particularly high among young females: 82% in Algeria, 68% in Libya, and 52% in Egypt, despite lower labor-force participation rates.[8] While young women are less likely to engage economically, once they decide to work, they struggle to find suitable jobs. They face additional challenges in the labor market including legal and institutional barriers to employment, discriminatory hiring practices, and conservative social norms that limit career options and movement outside the home. Despite their remarkable strides in educational attainment over the past decades, these advances have not fully translated into gains in the labor market, indicating continued underutilization of female youth potential in North Africa.[9]

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[8] World Bank, "Unemployment, Youth Female (Percent of Female Labor Force Ages 15 to 24) (National Estimate): Morocco, Algeria, Tunisia, Libya, Egypt, Arab Rep., Sudan", World Development Indicators, International Labour Organization (ILO) (data), accessed June 16, 2021.

[9] N. Kabbani, *Youth Employment in the Middle East and North Africa: Revisiting and*

For young people, the delay in entering the labor market affects their ability to secure a home, get married, and start a family.[10] Unable to realize their goals and dreams at home, young people across the region have sought to migrate. According to the 2018-19 Arab Barometer, a majority of the region's youth (18 to 29 years old) are considering migrating. The highest rates are in Morocco (70%), followed by Tunisia and Algeria (both at 56%), and Egypt (49%).[11] In Libya, only 31% of young people are thinking about migrating, a fairly low rate given the conflict, though Libya has used oil revenue to employ a large number of young people and pay their public-sector wages.

Historically, young people who were not able to migrate became disillusioned, demoralized, and depressed, creating conditions ripe for social unrest. While democratic systems allow people to voice social grievances and frustrations peacefully, and push for positive change, the authoritarian regimes of the region have used coercive and oppressive tools to keep public demands in check. For instance, the regime in Algeria repressed youth demands for better economic opportunities following oil price shocks.[12] Similarly, the Tunisian government used police violence to squelch youth pleas for a fairer economic situation during the bread riots of the mid-1980s.[13] Hence, when the Tunisian street vendor Mohamed Bouazizi set himself on fire in December 2010, in protest of his social and economic situation, and unjust treatment by local officials, it represented a catalytic

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Reframing the Challenge, Brookings Doha Center, Policy Brief, February 2019; E. Sayre and R. Hendy, "The Effects of Education and Marriage on Young Women's Labor Force Participation in the Middle East and North Africa", in E. Sayre and T.M. Yousef (eds.) (2016), pp. 72-87; and W. Sawahel, "Women Outnumber Men at Universities, Lag in Employment", *University World News, African Edition,* December 3, 2020.

[10] Kabbani (2019).

[11] D. Raz, "Youth in Middle East and North Africa", Arab Barometer, August 2019, p. 11.

[12] Yousef (2003), p. 21.

[13] J. Rupert, "Tunisians Riot Over Bread Price Rise", *Washington Post,* January 4, 1984.

event that launched the 2010-2011 protests in Tunisia and instigated uprisings across the Arab region. People, mainly youth, took to the streets initially chanting for better economic and social conditions; when met with police suppression, they demanded regime change.[14]

Looking ahead, North African countries have another opportunity to invest in their youth and reap the fruits of a demographic dividend. A smaller youth bulge – the children of the first wave – is approaching and will affect the region between 2025 and 2040 (Figure 5.2). What can North African countries do to ensure that they do not miss the potential of this wave? The way forward has three components: unshackling the private sector, reforming education systems, and creating space for youth to become civically engaged, air grievances, and seek redress for injustices.

Unshackling the Private Sector's Potential

Young people in North Africa face a difficult, precarious transition from school to employment. Though the public sector does not employ as many people as it once did, higher wages, better benefits, and job security have pushed educated youth to continue to queue for the available positions. The 2018 World Values Survey found that 66% of young Egyptian respondents would prefer to work in the public sector.[15] This share is scarcely changed from a decade earlier when 65% of young Egyptians said the same in a 2009 Gallup World Poll.[16]

[14] B. Whitaker, "How a Man Setting Fire to Himself Sparked an Uprising in Tunisia", *The Guardian*, December 28, 2020.

[15] Authors' calculations using data from C. Haerpfer, R. Inglehart, A. Moreno, C. Welzel, K. Kizilova, J. Diez-Medrano, M. Lagos, P. Norris, E. Ponarin, and B. Puranen et al. (eds.), *World Values Survey: Round Seven - Country-Pooled Datafile*, Madrid, Spain, and Vienna, Austria, JD Systems Institute and World Values Survey Association Secretariat, 2020, doi.org/10.14281/18241.1.

[16] Authors' calculations using data from *Gallup World Poll*, Gallup Organization, 2009.

Youth spend time searching for jobs in the formal private sector, which offers decent wages, benefits, and job security to registered employees, but that sector is relatively small and has failed to create enough good jobs. Furthermore, firms in the formal private sector employ workers on temporary contracts. These workers do not have access to the same levels of benefits and face a precarious employment situation. Young people, especially young women, are prone to falling into this informal category. The 2013-14 school-to-work transition survey found that 49% of employed people of ages 15 to 29 in Egypt, and 47% of this same cohort in Tunisia held informal jobs in firms in the formal sector (Figure 5.5).

Fig. 5.5 – Informal employment among youth (15-29) in Egypt and Tunisia
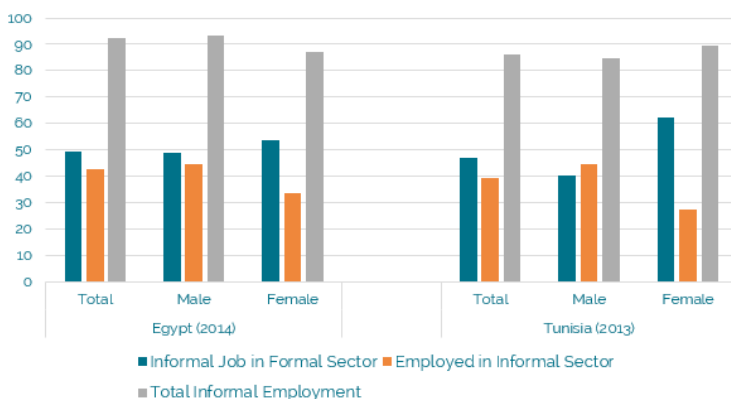
Source: Authors' calculations using International Labour Organization, "School to Work Transition Survey (SWTS), micro data files: Egypt 2014 and Tunisia 2013".
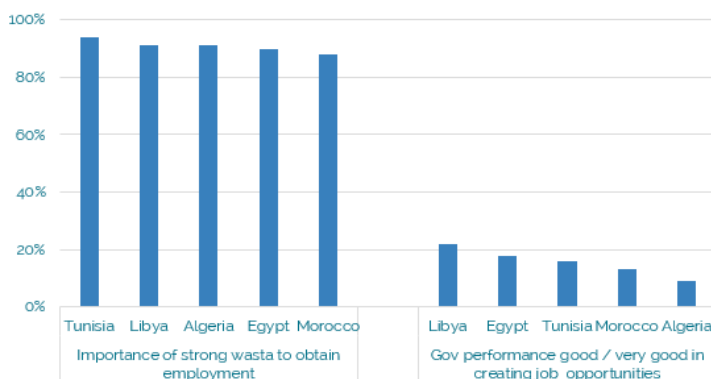
Source: D. Raz, "Youth in Middle East and North Africa", Arab Barometer, August 2019, pp. 9-10.

Throughout the region, most firms operate in the informal economy. Overregulation and arbitrary taxation have encouraged these firms to remain small and avoid registering their activities. Firms in the informal sector are less attractive to young workers, as they provide less in the way of wages, benefits, job security, social protection, and opportunities for career advancement. However, young people who are not able to secure jobs in the formal sector accept such positions. In Egypt, 43% of young workers are employed with firms in the informal sector (Figure 5.5); in total, 92% of young employees in Egypt either work for a firm operating in the informal sector or have an informal job in a firm in the formal sector. In Tunisia, 39% are employed with firms in the informal sector, and the combined share is 86%.[17]

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[17] Authors' calculations using data from "School to Work Transition Survey (SWTS) Micro Data Files: Egypt 2014 and Tunisia 2013", International Labour Organization (ILO).

In dynamic economies, most jobs are created through the establishment and growth of small firms. Young firms also tend to hire young workers. In North African economies, this job-creation engine is severely constrained. Large firms run by politically connected insiders survive and thrive because they can leverage their connections to gain an unfair advantage over newer firms. For instance, firms owned by former Tunisian President Ben Ali and his family exploited their power for decades to avoid import duties and other tariffs.[18] Larger firms also can afford to hand out jobs to people with connections, even if they are not the best fit.[19] This use of *wasta* exacerbates socioeconomic inequalities and can fuel resentment among marginalized youth. The overwhelming majority of young people in the region believe that wasta is needed to secure employment (Figure 5.6).

North African states have begun encouraging young people to create their own businesses. For instance, Egypt has established the Technology Innovation and Entrepreneurship Center, which organizes events, workshops, and competitions promoting entrepreneurship among Egyptian youth.[20] In 2006, Morocco started the Moukawalati (my enterprise) program, which is aimed at setting up 30,000 small businesses and hiring between 60,000 and 90,000 Moroccans.[21] Though governments are trying to support start-ups – introducing education and training programs, improving access to finance, and establishing

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[18] B. Rijkers, L. Baghdadi, and G.J.R.F. Raballand, *Political Connections and Tariff Evasion: Evidence from Tunisia*, World Bank, Policy Research Working Paper no. WPS 7336, June 2015.

[19] Kabbani (2019); and M. Said, "Arab Youth Employment in the Wake of the Global Financial Crisis", in E. Sayre and T.M. Yousef (eds.) (2016), pp. 50-71.

[20] P. Jochaud, *Youth Productive Employment through Entrepreneurship Development in the Arab Region: State of the Art of Interventions in Egypt and Tunisia*, United Nations Industrial Development Organization, Working Paper no. 5, 2013, p. 14.

[21] The program did not succeed in reaching the set goals, mainly because the applicants failed to develop proper business plans, and a large number of the start-ups defaulted on their loans. See S. Alaoui, "Developing Youth Entrepreneurship in Morocco", *Al Jazeera*, August 25, 2015.

linkages with value chains and markets – growth in the number of firms remains constrained. Indeed, the share of employers as a percentage of total employment is on the decline and does not, for example, exceed 3% in Libya.[22] Barriers to entrepreneurship include difficulties in accessing finance and overregulation of the business environment.[23] In the World Bank's Ease of Doing Business ranking, only Morocco and Tunisia rank in the top half of economies in the world (fifty-third and seventy-eighth out of 190 economies, respectively). Egypt comes next, at No. 114. Algeria and Libya rank near the bottom, at Nos. 157 and 186, respectively. Importantly, compared to a decade ago, only Morocco improved its global ranking (up from No. 128); Tunisia and all other North African countries (tracked in the survey) fell in the ranking.[24]

To leverage the coming demographic wave, countries in North Africa must unlock the ability of the private sector to grow, thrive, and create jobs. This is doubly important in the face of increased automation and digitalization. To unlock the potential of their private sectors, North African governments must undertake a set of three complementary reforms: enabling economic development, reorienting state enterprises, and unleashing the private sector.

First, North African countries need to transform their public sectors from unresponsive instruments of state bureaucracy to enablers of economic development. In 2018, 88% of young Egyptian respondents to the World Values Survey rated the government's performance at creating jobs as bad (32%) or very bad (56%). The Arab Barometer obtained similar findings across North Africa (Figure 5.6).[25] Leaders therefore need to

[22] World Bank, "Employers, Total (Percent of Total Employment) (Modeled ILO Estimate): Morocco, Algeria, Tunisia, Libya, Egypt, Arab Rep., Sudan", World Development Indicators, accessed June 16, 2021.

[23] Kabbani (2019).

[24] World Bank, "Ease of Doing Business" (database), World Bank website, accessed June 15, 2021.

[25] Raz (2019), pp. 9-10.

respond by reorienting how states and their citizens conceive the role of government. It requires transforming public-sector employment from an entitlement and source of personal benefit to a public service. This is the only way to change the perception of bureaucracy as an instrument of control to a proper regulator of rules and an enabler of initiative.

Second, leaders must orient state enterprises toward large infrastructure projects and away from sectors of the economy best left to open competition. Infrastructure investments include oil and gas exploration and production, such as Algeria's Sonatrach; renewable energy projects, such as Morocco's Noor Power Plant; public rail and transportation projects, such as the Tangier-Casablanca high-speed rail; and mobile phone and broadband operations, such as the Decent Life project in rural Egypt. Such large-scale projects can benefit from state involvement and provide rent-seeking opportunities for insiders, who must gain something in order to allow other sectors of the economy to develop unimpeded. Such large-scale projects must be based on sound feasibility studies, transparent decision-making and budgeting, and systems that can hold organizations accountable.

Third, North African countries need to get out of the way of firms and entrepreneurs, especially those in growth-oriented sectors, and allow them to contribute to economic growth and create jobs without undue interference.[26] Of course, public agencies need to oversee private-sector activities and regulate those that could have an adverse impact on public health and well-being. However, bureaucracies must shift from having to approve every activity to allowing firms to act and simply report. This dysfunctional system of requiring approvals for all activities has dampened economic growth and job creation since informal firms restrain their own growth to avoid attracting too much attention. Paradoxically, reducing approvals simply

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[26] A. Malik and B. Awadallah, "The Economics of the Arab Spring", *World Development*, vol. 45 2013, pp. 296-313.

acknowledges the reality. Today, bureaucratic processes are so cumbersome and arbitrary that most private-sector activity is informal, conducted outside bureaucratic oversight. This system has opened the door to corruption and graft, ignorance of critical public health and safety regulations, and endemic tax avoidance.

Youth Education in a Digital Age

During the 1960s and 1970s, North African governments invested heavily in building schools and increasing enrollment at all levels. Educational attainment, in terms of lower secondary completion rates, increased from 9.2% during the early 1970s to 73% by the mid-2000s in Algeria; 11% to 47% in Morocco; and 35% to 78% in Egypt.[27] In 2008, the governments of Tunisia and Morocco spent more on education as a share of gross domestic product (GDP) than the world average; Algeria and Egypt spent less than the world average, yet more than lower middle-income countries.[28] The result of these years of investment was a remarkable increase in the average years of schooling for people over the age of fifteen (Figure 5.7).[29]

[27] World Bank Group, "Lower Secondary Completion Rate, Total (Percent of Relevant Age Group): Morocco, Algeria, Tunisia, Libya, Egypt, Arab Rep., Sudan", World Development Indicators, accessed June 7, 2021.

[28] Our World in Data (database), "Total Government Expenditure on Education, 1971 to 2015", University of Oxford and Global Change Data Lab website, accessed June 9, 2021.

[29] D. Salehi-Isfahani, "Schooling and Learning in the Middle East and North Africa", in E.A. Sayre and T.M. Yousef (eds.) (2016), pp. 35-49.

Fig. 5.7 – Average years of total schooling,
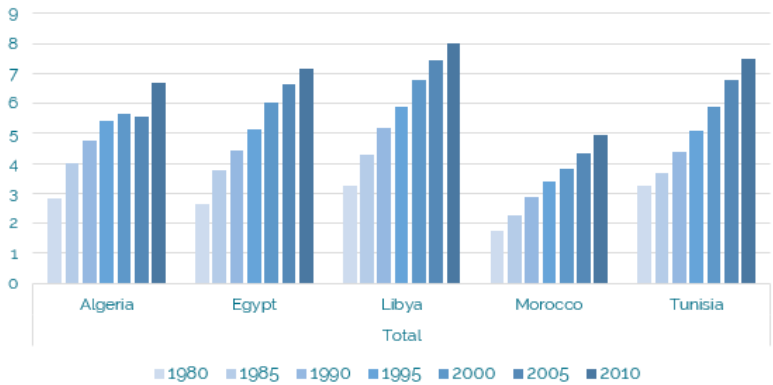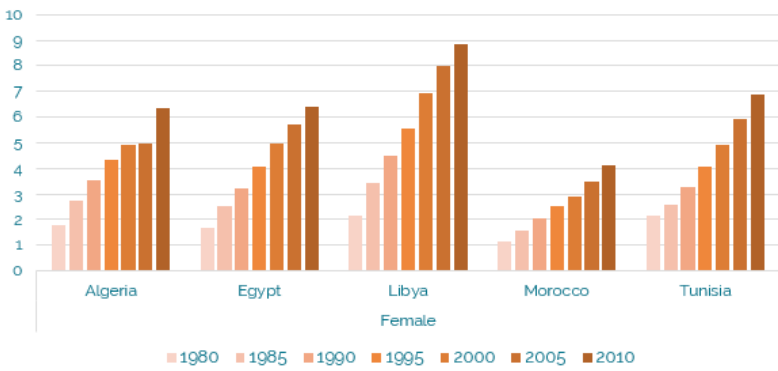total population age 15+

Fig. 5.8 – Average years of total schooling
female population age 15+

Source: Our World in Data (Barro-Lee database), "Mean Years of Schooling, 1870 to 2017", University of Oxford and Global Change Data Lab website, accessed June 9, 2021.

North African countries also made progress in closing the education gender gap. In 1970, average years of schooling for women in the MENA region was only 40% that of men. By 2010, it was 88% – still lagging, but much improved (Figure 5.8). These countries also showed reduced inequality of opportunity in terms of ever attending school.[30] However, progress in gender equality in education varied: in Tunisia, 66% of the students enrolled at public universities during the 2018-2019 academic year were female,[31] followed by Algeria and Libya with 64%; in Morocco and Egypt, the female enrollment ratio was reversed, at 39% and 36%, respectively.[32]

Despite educational-attainment progress, the region is lagging in terms of the quality of education. Within nations, quality varies between urban and rural regions, and central and marginalized areas.[33] High enrollment rates, demographic pressures, and excessive bureaucratization of the system have decreased educational quality overall, with negative consequences for labor-market outcomes.[34] Schools in the region have focused on knowledge transfer, rote memorization, and conferring degrees, with less attention given to developing critical thinking, problem-solving, and teamwork,[35] even

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[30] United Nations Economic and Social Commission for Western Asia, *Rethinking Inequality in Arab Countries*, 2019, p. 98,

[31] Sawahel (2020).

[32] World Bank Group, *School Enrollment, Tertiary, Female (Percent Gross): Morocco, Algeria, Libya, Egypt, Arab Rep., Sudan*, World Development Indicators, accessed June 9, 2021.

[33] United Nations Educational, Scientific, and Cultural Organization (UNESCO), *UNESCO Arab Regional Education Support Strategy 2016-2021*, 2016.

[34] World Bank, *The Road Not Traveled: Education Reform in the Middle East and North Africa*, MENA Development Report 46789, 2008; United Nations Development Programme (UNDP), *Arab Human Development Report 2003: Building a Knowledge Society,* 2003; World Bank and Organisation for Economic Co-operation and Development, *Reviews of National Policies for Education: Higher Education in Egypt 2010*, 2010; and UNESCO, *Education 2030 Arab Region Outcome Statement,* Prepared by Nineteen Arab States of UNESCO and Arab Regional Support Group for Education 2030, 2018.

[35] A. Galal, *The Paradox of Education and Unemployment in Egypt*, Egyptian Center

though these skills are increasingly relevant in a digitalized world.

Research has established links between quality of education and individual achievement, such as earnings, as well as country-level outcomes, such as productivity and social-economic progress.[36] The declining quality of education is reflected by low scores on international standardized tests. In 2015, the share of students achieving proficiency benchmarks on standardized international tests, such as the Trends in Mathematics and Science Studies (TIMSS) of the International Association for the Evaluation of Educational Achievement (IEA), in Algeria, Egypt, Morocco, and Tunisia was consistently below world averages (Figure 5.9).[37] Djavad Salehi-Isfahani (2016) argues that all MENA countries participating in the 2011 TIMSS had low scores given their levels of income and spending on education, when compared to other countries.[38] In addition, the absence of private-sector input on vocational curricula led to poor technical skills and sizable mismatches with labor-market

for Economic Studies, 2002; N. Kabbani and E. Kothari, *Youth Employment in the MENA Region: A Situational Assessment*, World Bank, Social Protection Discussion Paper 534 2005; D. Salehi-Isfahani, I. Tunali, and R. Assaad, "A Comparative Study of Returns to Education of Urban Men in Egypt, Iran, and Turkey", *Middle East Development Journal*, vol. 1, no. 2, 2009, pp. 145-87.

[36] E. Hanushek, *Economic Outcomes and School Quality*, Education Policy Booklet Series, vol. 4, a joint publication of the International Institute for Educational Planning and International Academy of Education, 2005; P. Wachtel, "The Effect of School Quality on Achievement, Attainment Levels, and Lifetime Earnings", *Explorations in Economic Research*, vol. 2, no. 4, 1975, pp. 502-36 in out-of-print volume published by National Bureau of Economic Research; P. Wachtel, "The Effect on Earnings of School and College Investment Expenditures", *Review of Economics and Statistics*, 1976, pp. 326-31; and T. Kanaan in collaboration with M. Al-Salamat and M. Hanania, "Financing Higher Education in Jordan," in A. Galal and T. Kanaan (eds.), *Financing Higher Education in Arab Countries*, Economic Research Forum Policy Research Report no. 34, July 2010, pp. 29-47.

[37] Our World in Data (database), "Learning Outcomes, Minimum vs Advanced Achievement, 2015", University of Oxford and Global Change Data Lab website, accessed June 9, 2021.

[38] Salehi-Isfahani (2016).

needs.[39] This skills mismatch has resulted in low returns on education, such that one extra year of schooling yields around 5.4% of returns, compared to a world average rate of 7%.[40] This low return can be partly explained by the overproduction of the tertiary education systems, with qualifications that do not align with private-sector needs.[41]

FIG. 5.9 – AVERAGE TIMSS MATH SCORES
OF 8TH GRADE STUDENTS
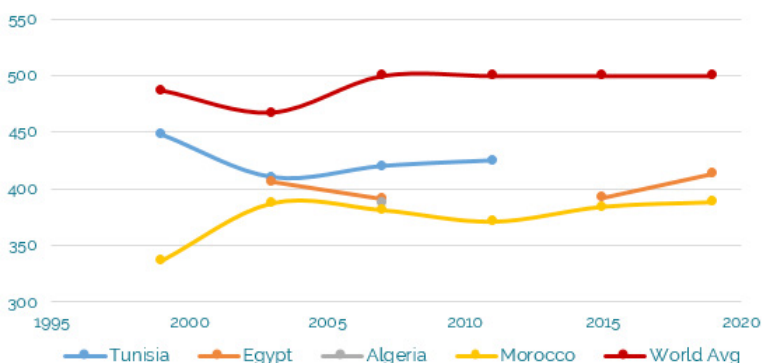
Source: IEA's TIMSS and Progress in International Reading Literacy Study (PIRLS), IEA, TIMSS & PIRLS International Study Center, Lynch School of Education, Boston College, https://timssandpirls.bc.edu/isc/publications.html

The deficit in developing key skills among students has important implications for their ability to succeed in a digitalized world. North African public education systems are not fully harnessing digitalization and technology in teaching and learning. While using technology in school can boost student

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[39] R. Assaad and G. Barsoum, "Rising Expectations and Diminishing Opportunities for Egypt's Young", in N. Dhillon and T. Youssef (eds.), *Generation in Waiting: The Unfulfilled Promise of Young People in the Middle East*, Washington DC, Brookings Institution Press, 2009, pp. 67-94; and Salehi-Isfahani (2016).
[40] UNESCO (2018).
[41] World Bank, *Youth Employment in Tunisia: Concept Note for Activities under the New Window 'Better Employment Policies'*, 2020.

engagement and collaboration, and teach skills essential for this decade and beyond, North African countries have not yet fully incorporated these tools into their education systems. Internet access, for instance, is inadequate; between 2010 and 2019, only 79% of primary schools in Morocco, 49% in Tunisia, and 48% in Egypt had access.[42] While education expenditure as a percentage of GDP in Tunisia is higher than the MENA and world averages, most of this spending covers wages, not on modern educational inputs.[43] Youth across the region report low satisfaction levels with their respective education systems; in the most recent Arab Barometer survey, less than 30% of North Africans ages 18 to 29 were satisfied (Figure 5.10).

The COVID-19 pandemic, which has impacted learning across the world, has demonstrated the importance of digitalization and online schooling as vital aspects of teaching and learning. Yet some of the region's countries did not have appropriate infrastructure and platforms to shift to online teaching and learning. School closures due to the pandemic lasted more than thirty weeks in Morocco and Tunisia, and nearly fifty weeks in Libya.[44] As an alternative, Libya and Morocco broadcasted lessons on national television channels.[45]

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[42] UNDP, *Human Development Report 2020: The Next Frontier: Human Development and the Anthropocene*, 2020.

[43] N. Yarrow, "Education in Tunisia: Technology as a Tool to Support School Improvement", World Bank (blog), October 24, 2017.

[44] UNESCO, "Education: From Disruption to Recovery", UNESCO COVID-19 webpage, accessed June 15, 2021.

[45] World Bank, "How Countries Are Using Edtech (Including Online Learning, Radio, Television, Texting) to Support Access to Remote Learning during the COVID-19 Pandemic", World Bank (brief), accessed June 15, 2021.

FIG. 5.10 - SATISFIED WITH THE EDUCATION SYSTEM
(AGE 18-29, 2018-2019)
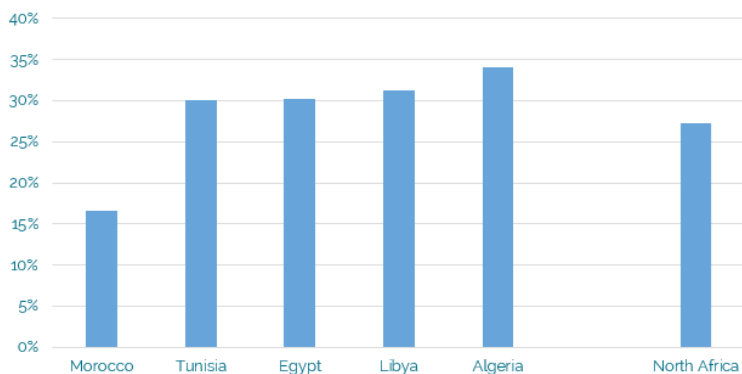
Source: Arab Barometer, Data Analysis Tool

The future of education in the region calls for a quantum leap from traditional pedagogies to newer methods that develop digital literacy skills and competencies. That means integrating information and communications technology at all levels of education, adopting information literacy within curricula, incorporating open and flexible tools and assistive technology, and establishing mobile and online platforms with equitable access to all students.[46] Finally, it is time for significant reform in the governance of public educational institutions to ensure transparency and accountability, and to foster partnership and collaboration between public institutions and the private sector.

Reforming the education system is the first step in reforming a labor market that cannot absorb cohorts of public-school graduates. In addition to a misalignment of teaching and market needs, there is a need for more efficient academic and career counseling and outreach, and bridging programs that link high schools and universities with the private sector.[47] In addition,

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[46] UNESCO (2021).

[47] S. El Tayeb El-Kogali and C. Krafft (eds.), *Expectations and Aspirations: A New*

employment offices must provide more user-centered service for job seekers and hiring entities alike.[48] Digitalization and technology also must be incorporated in job search approaches to improve cost efficiency and widen options. Importantly, career guidance can foster more realistic expectations about entry-level opportunities and wages. Such guidance could reduce the length of job searches, curbing the desire to wait for the "right" opportunity that may never materialize.

Political Participation and Civic Engagement: Toward Real Youth Inclusion

Active citizenship and civic engagement are key components of a healthy transition to adulthood, and contribute to both personal development and increased social cohesion.[49] Civic activism also can foster stronger social values and serve as a foundation for good governance, while promoting peaceful coexistence and reducing extremism.[50] Conversely, the lack of venues and institutions to facilitate such engagement may marginalize youth and prevent them from achieving full inclusion in their communities. In such cases, young people may develop weak national identities and low levels of allegiance, which could raise the risk of identifying with extremist nonstate groups.[51]

Framework for Education in the Middle East and North Africa, Washington DC, World Bank Publications, 2019.

[48] World Bank (2020).

[49] World Bank, *World Development Report 2007: Development and the Next Generation*, 2006; United Nations Department of Economic and Social Affairs (UN DESA), *Youth Civic Engagement*, United Nations Publication, 2016; and T. Desrues and M. Garcia De Paredes, "Participation, Association-building and Dissent in North Africa: The Various Dimensions of Youth Activism, from the Fall of Ben Ali to the Revolt against Bouteflika (2011-2019)", *Journal of North African Studies*, vol. 26, no. 2, March 4, 2021, pp. 188-205, and p. 191.

[50] UN DESA (2016); and Mercy Corps, *Civic Engagement of Youth in the Middle East and North Africa: An Analysis of Key Drivers and Outcomes*, 2012.

[51] J.A. Banks, "Failed Citizenship, Civic Engagement, and Education", *Kappa Delta Pi Record*, vol. 51, no. 4, 2015, pp. 151-54.

Civic engagement and political participation through channels such as electoral participation, membership in community-based organizations, and volunteerism are shaped by the surrounding socioeconomic and political environments.[52] The 2011 Arab uprisings, for example, had a huge impact on youth political awareness. Young voter turnout in parliamentary elections, according to the 2011-2013 Arab Barometer, increased by 36 percentage points in Tunisia, 31 points in Egypt, and 9 points in Algeria.[53] Yet their electoral engagement declined in subsequent years, with regional average turnouts dropping from around 57% in 2013 to less than 20% in 2018-2019 (Figure 5.11).

Fig. 5.11 – Turnout in last parliamentary elections (ages 18-29)
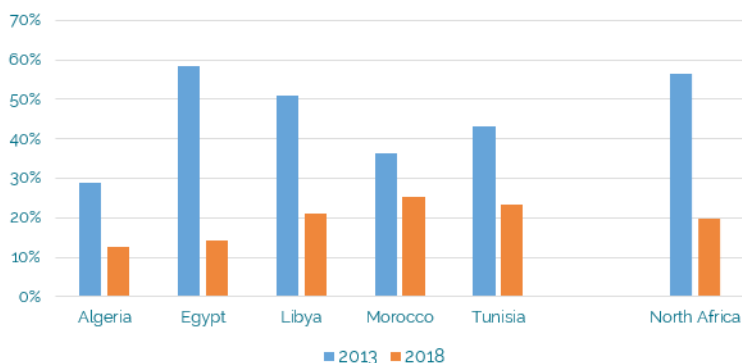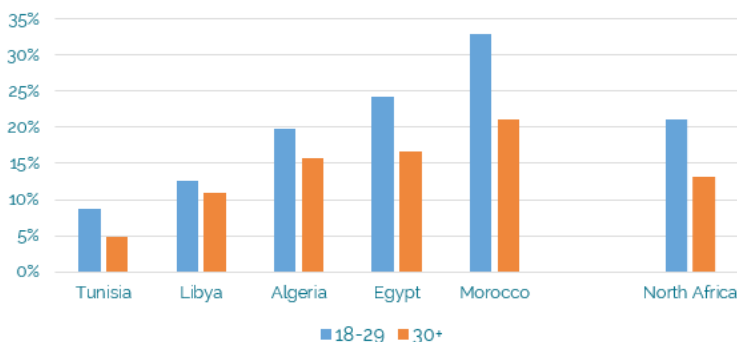

Source: Arab Barometer, "Wave III and V: Elections and the House of Representatives", survey data accessed June 30, 2021.

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[52] Mercy Corps (2012).
[53] Arab Barometer, "Wave II and III: Elections and the House of Representatives", survey data accessed June 30, 2021.

Fig. 5.12 – Membership in an organization, group, or club
(2018-2019)

Such political disengagement reflects frustration with the
lack of change taking place a decade after the uprisings and
the continued socioeconomic exclusion of youth. In addition,
North African youth are underrepresented, and nearly absent,
in political organizations, decision-making, and legislative
bodies, as rules and procedures do not favor their inclusion.
For instance, eligibility for national parliament seats starts
at twenty-five years in Algeria, Egypt, and Libya.[54] Even so,
young adults (ages 25 to 35) represented only 3.6% of the
2015 elected parliament in Egypt, for example.[55] Young people
also report low trust in public institutions and low levels of
perceived freedom. In 2018-2019, around 50% of the region's
youth reported that they have no trust in their governments

[54] "Algeria: Al-Majlis Al-Chaabi Al-Watani (National People's Assembly),
Electoral System", Inter-Parliamentary Union website, accessed June 30, 2021;
"Egypt: Majlis Al-Nuwab (House of Representatives), Electoral System", Inter-
Parliamentary Union website, accessed June 30, 2021; "Libya: Majlis Al-Nuwaab
(House of Representatives), Electoral System", Inter-Parliamentary Union
website, accessed June 30, 2021.

[55] Egypt: Majlis Al-Nuwab (House of Representatives), Electoral System", cit.

(council of ministers).[56] In addition, in all five countries, youth have reported low and decreasing levels of guaranteed freedoms of speech (from 67% in 2013 to 40% in 2018-19) and participation in peaceful protests (from 58% to 31% in those same years).[57] North African countries are increasingly limiting freedom of speech and content online, a medium that is a main space for engagement among young people. None have internets that are classified as "free" by Freedom House.[58] Egypt now ranks among the most restrictive countries in the world after the passage of a cybercrime law in 2018 that, among other things, allows authorities to block websites considered a threat to national and economic security, and requires internet service providers to save and release personal information to security services.[59]

Young North Africans also have low rates of social engagement, reflected in terms of membership in civic organizations, groups, and clubs. Less than 10% of Tunisian youth (ages 18 to 29) were members of a civic organization in 2018-19 (Figure 5.12). Civic participation rates are low across the region, reaching a high of only 33% in Morocco. The rates can be explained in part by the relatively low levels of perceived freedom to join such associations and organizations, averaging 48% for the region's youth in 2018-19.[60] There are few appropriate youth-friendly venues and institutions, and a lack of awareness of the existing ones. The lack of opportunities for civic engagement and political participation may translate into future deficits in skills, awareness, and organizational know-how for formal political participation.

[56] Arab Barometer, "Wave V: Evaluation of Public Institutions and Political Attitudes", survey data accessed June 30, 2021.

[57] Arab Barometer, "Wave III and V: Governance," survey data accessed June 30, 2021.

[58] Freedom House, *Freedom on the Net 2020: The Pandemic's Digital Shadow*, October, 2020.

[59] E. Miller, *Egypt Leads the Pack in Internet Censorship across the Middle East*, MENASource, Atlantic Council, August 28, 2018.

[60] Arab Barometer, "Wave III and V: Governance"…, cit.

North African countries must create more space for their young people to engage socially and participate politically. This should be done by first and foremost removing barriers to participation, such as requiring young people to apply for permits to form social clubs or to congregate in peaceful protest. Such permits and approvals, like those required for economic participation, serve mainly as a vehicle for marginalization and exclusion. North African countries must also provide platforms for young people to voice their legitimate grievances and seek redress without being persecuted or being labeled an enemy of the state. Finally, greater social and political inclusion requires changes in the sociopolitical environment, more inclusive institutions, and the development of youth's own capacities for engagement.[61]

Conclusion

Two decades ago, North African countries experienced a demographic youth bulge that created both pressures and a historic opportunity for faster economic growth. Unfortunately, these countries did not create enough economic opportunities or sociopolitical space to reap the national benefits of this demographic gift. As a result, the region has been plagued by outward migration and unrelenting social unrest over the past decade.

North African nations have a second chance at a demographic gift with a smaller youth bulge that will occur between 2025 and 2040. Will these countries move quicky to invest in their youth and reap the benefits of this bulge or suffer continued social unrest? The stakes are even higher this time: the second wave comes at a time of rapid automation and digitalization that is transforming the world of work. These global technological trends hold the promise of large economic

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[61] UNDP, *Enhancing Youth Political Participation throughout the Electoral Cycle: A Good Practice Guide,* UNDP (toolkit), January 2013.

rewards for countries that can harness them, and the threat of getting left behind for those that cannot. To reap the benefits of the coming demographic wave and ongoing digital revolution, North African states must allow private sectors to grow and create jobs; they must transform their schools and universities to provide youth with the skills they need to thrive in this decade and beyond; and they must create space for young people to participate socially and politically.

6. Regional Cooperation and Permeability to External Influence

Shlomo Roiter Jesner, Jay Mens

Any assessment of North Africa's prospects would be incomplete without factoring in the role of external actors. At its closest point, Europe is a mere 9 miles from Morocco, and 290 miles of water separate the Italian island of Lampedusa from war-torn Libya, making it clear why external actors would have an interest in shaping the future of the region. This proximity, the role that North Africa plays in exerting control over the contested Eastern Mediterranean basin, and an abundance of resources including oil, coal, and a range of metallic elements, draw the interest of not only European powers but Turkey, Russia, China, and the Gulf states.[1]

Regional cooperation among North African states will, however, continue to be instrumental in shaping the future of the region. Such cooperation has an impact on the extent to which these states are open to external influence. Recently, increasing tensions between Morocco and Algeria illustrate how external alignment can continue to shape regional conditions, with Morocco improving its relations with Belgium, France, and Italy, and Algeria turning toward Spain.[2]

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[1] "Mapping Africa's Natural Resources", *Al-Jazeera*, February 20, 2018; and P.P. Raimondi, "The New Energy Geopolitics of 'East Med'", *Aspenia Online*, October 5, 2020.

[2] S. Karam, "Algeria Cuts Diplomatic Ties with Morocco as Tensions Build", *Bloomberg*, August 24, 2021.

Finally, relations with sub-Saharan African countries, though outside the immediate realm of regional North African alliances, remain a significant focus for North Africa leaders. While some North African states are looking south to garner diplomatic support, others see economic opportunity as well as strategic security interests. A better understanding of these interests will enable external actors with a vested interest in the future of North Africa to better cooperate on furthering common policy agendas, such as curbing migration, encouraging economic development, and stemming security threats.

Morocco and Algeria

The ongoing diplomatic crisis between Morocco and Algeria has underscored the fragility of relationships in the region, emphasizing the need to pursue state interests independent of a regional framework.[3] The immediate future of the region will be one defined by the pursuit of such independent interests, with adjustments based on the context of what is happening in neighboring states.

Morocco has and will continue to serve as a prime example of this reality. Relations between Rabat and Algiers recently hit a new low point following allegations that Morocco employed Pegasus spyware made by NSO Group of Israel against officials in other states (in addition to targeting journalists and other Moroccans).[4] Relations have long been strained between the two amid Morocco's claims on the disputed Western Sahara

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[3] Ibid.

[4] C. Timberg et al., "On the List: Ten Prime Ministers, Three Presidents and a King", *Washington Post*, as part of the Pegasus Project, a global investigation, July 20, 2021; and "Pegasus Project: All the Articles", *Forbidden Stories*, accessed September 15, 2021. Note: Morocco denied newspaper reports that "falsely claim that Morocco has infiltrated the telephones of several national and foreign public figures and officials of international organizations through computer software". See: *Washington Post* staff, "Responses from Countries to the Pegasus Project," *Washington Post*, July 19, 2021.

and Algeria's support for the Polisario Front opposing them. While the Trump administration's recognition of Moroccan sovereignty over the Western Sahara came as a welcome development for Rabat, uncertainty persists about the line the Biden administration will take on the matter.[5]

These developments have and will continue to be a strong catalyst for Morocco to strengthen its position as a regional military power. Morocco has sought to modernize its military and specifically its air force and unmanned aerial vehicle (UAV) program, and in April 2021 the state used a UAV for the first time in the Western Sahara.[6] Relations with Israel, formally established more than a year ago as part of the historic Abraham Accords, are particularly relevant given Israel's position as one of the world's foremost drone producers. Relations with Israel will likely strengthen in the coming years, not least because of the strong Moroccan Jewish community residing in Israel and maintaining a cultural connection with its roots. These relations have begun and will perhaps continue to serve as a justification for the worsening of the crisis between Morocco and Algeria.[7]

On the military front, continued strong US support for the modernization of the Moroccan military is anticipated, with deals signed for twenty-four Apache helicopters and twenty-five new F-16 fighter planes.[8] Despite the importance of the US relationship, an attempt at diversification of alliances by Morocco can already be seen as it seeks to bring other partners from abroad to ensure its strategic position. The recent US exit from Afghanistan – perceived as abandonment – has only underscored the need to have other potential partners in the

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[5] J. Stepansky, "Why Biden's Western Sahara Policy Remains under Review", *Al Jazeera,* June 13, 2021.

[6] A. Helou, "Here Are Morocco's Top Priorities for Modernizing Its Air Force", *Defense News*, August 18, 2021.

[7] R. Bassist, "Algeria Partly Blames Israel in Decision to Cut Ties with Morocco", *Al-Monitor*, August 25, 2021.

[8] H. Reyes, "Raytheon to Supply Morocco with F-16 Engines in $212 Million Contract", *Defense Post*, July 29, 2021.

pipeline. In this regard, Russia and China are the primary contenders, along with the continued development of relations with European partners, namely Belgium, France, and Italy.

Aside from concerns related to the Western Sahara and its push to garner support among sub-Saharan African allies, Morocco can be expected to continue its push south, after having rejoined the African Union in 2017. King Mohammed VI has over the course of his reign made it a priority to increase Moroccan foreign direct investment in African states, particularly furthering the reach of his country's banking and telecommunications sectors. In the longer term, the Moroccan government's aim is to establish itself as an economic gateway to Africa that is too important for the West and China to ignore, drawing in new allies who will need to align with its own diplomatic aims.[9]

With the French language being a cultural connector between Morocco and many African nations, Morocco will continue to project elements of soft power via its Moroccan International Cooperation Agency. Such efforts will persevere on the religious front as well, with Morocco making use of its Mohammed VI Foundation to promote its own moderate vision of Islam.

Algeria will in the coming years be shaped by a mix of factors, some of which are related to its conflict with Morocco, but primarily linked to its desire to increase international cooperation and reclaim regional influence. This aim was exemplified by Algerian President Abdelmadjid Tebboune's mid-2020 creation of the Algerian Agency for International Cooperation for Solidarity and Development, which is meant to "infus[e] a new dynamic in Algeria's international cooperation, especially toward African countries".[10]

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[9] Y. Abouzzohour, "Israel, Africa and Libya: Morocco's Foreign Policy Trump Cards", Lawfare (blog), Lawfare Institute in cooperation with Brookings Institution, August 16, 2021.

[10] S. Blidi, "Algeria Is Seeking to Recapture Lost Influence in Africa", *Arab Weekly*, April 25, 2021.

While Algeria's foreign relations outside Africa, particularly with France, have been focused on fighting terror and countering extremism, on the continent Algeria will continue to seek to develop economic and cultural cooperation with African states. The need for further strengthening regional economic ties began when the hydrocarbon-focused economy bore the brunt of the dramatic fall in oil prices in 2014. The strategy for engagement with Africa was evident in a 2019 speech given by Tebboune, who listed his focus on relations with Africa as a priority.[11] The manifestation of these plans was seen with the 2020 opening of a trans-Saharan highway connecting Algiers with Lagos, sub-Saharan Africa's largest city.

Unlike Morocco, Algeria has not and should not be expected to focus its regional alliances around military buildup, although regional security in the Sahel should be expected to remain a priority. It is around issues such as this that its relationship with the United States will continue to be based on the question of Libya's future. As a neighbor, Algeria will continue to take a keen interest in the role that foreign forces play there: US State Department official Joey Hood, on a recent visit, described «common goals, which are to talk with our allies and partners about how [to] improve the situation to set a strategy for the withdrawal of all foreign forces from Libya as quickly as possible".[12] This interest in Libya will be strengthened by the economic and diplomatic interest its regional rival Morocco has begun to take in the issue.

Permeability to external influence in the Algerian case very much runs through Ankara, which continues to be one of Algeria's central allies. The strength of these relations stem from a common outlook on regional security issues, including developments in Libya and Tunisia, alongside strong economic ties. Both of these issues were emphasized in a recent visit to

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[11] B. Hafiane, "Allocution du Président Tebboune au 33ème sommet de l'UA à Addis-Abeba", Algerie Presse Service, February 9, 2020.

[12] "US Official Discusses Regional Security, Libya on Algeria Visit", *Arab Weekly*, July 31, 2021.

Algiers by Turkish Foreign Minister Mevlüt Çavuşoğlu, who stated that both countries aim to increase their bilateral trade volume to $5 billion. With relations still contentious between the current administration in Washington and Ankara, and while the Biden administration reviews policies in the region and shifts its priorities to counter China, Turkey may seek to fill a perceived void in North Africa.[13]

Beyond Libya, where thousands of Turkish soldiers and Turkish-funded mercenaries are currently deployed, there is another space where Turkey may reassert its position in North Africa in the coming years: mitigating tensions between Algeria and Morocco. Turkey is well-positioned to play the role of go-between: It has sixty-five years of diplomatic relations with Morocco, and the Turkish Ministry of Foreign Affairs describes its relations with Algeria as based on "common history as well as deep-rooted cultural and brotherly ties".[14]

Tunisia

The political crisis in Tunisia is indicative of the political path to expect for the country in the coming years. As discussed in chapter 1 of this larger report on North Africa, the crisis began in July 2021 when Tunisian President Kaïs Saïed dismissed Prime Minister Hichem Mechichi, and subsequently suspended the Assembly of the People's Representatives and invoked the emergency powers of the Tunisian constitution's Article 80. "The coup is losing momentum", opines David Hearst, commentator and *Middle East Eye*'s editor-in-chief.[15] Tunisia relies on foreign aid and is saddled with $6 billion of national

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[13] N. Danforth, *A Cool, Cautious Calm: US-Turkey Relations Six Months into the Biden Administration*, Brookings Institution, July 15, 2021.

[14] "Relations between Turkey-Algeria", Turkish Ministry of Foreign Affairs (website), accessed August 29, 2021.

[15] D. Hearst, "Tunisia Coup: Why Its Days Could Be Numbered", *Al-Monitor,* August 5, 2021.

debt, which in theory could make it open to the nudges of Western allies. Yet the pace of appointments to replace those forced out is slow, and Tunisia's strongman does not appear to be budging.

This clear process of democratic backsliding – in the country in which the 2011 Arab Spring broke out and had been viewed as the only "success story" – will necessarily have a negative impact on its alliances with Western actors, particularly the United States and Europe.[16] US Senators Jim Risch and Bob Menendez made abundantly clear the risk that the ongoing seizure of power poses to US-Tunisia relations, recently stating, "President Saied must recommit to the democratic principles that underpin US-Tunisia relations, and the military must observe its role in a constitutional democracy". The European Council expressed similar concern: "Preserving democracy and stability in the country is a priority".[17]

The continued fallout with Western allies is already leading Tunisia's new government to strengthen alliances with regional actors such as the United Arab Emirates and Saudi Arabia. Flush with cash, both of these countries share with Tunisia's new government a desire to deal a significant blow to political Islam in all its forms. In the case of Tunisia, this comes in the form of the Ennahda Movement, or Renaissance Party. The UAE's support for military strongman Khalifa Haftar in Libya stemmed from similar motivations, such as a desire to defeat "extremist militias".[18] The opposite is true with Turkey, which views with great concern the ongoing governance crisis in Tunis, particularly in light of President Erdoğan's own strong domestic relationship with Islamists. This should be expected to have negative effects on the Turkish-Tunisian relationship

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[16] I. Bremmer, "Why Tunisia's Democracy Could Be on the Verge of Collapse", *Time*, August 12, 2021.

[17] European Council, "Tunisia: Declaration by the High Representative on Behalf of the European Union", Press Release, July 27, 2021.

[18] A. El Yaakoubi, "Haftar's Ally UAE Says 'Extremist Militias' Control Libyan Capital", *Reuters*, May 2, 2019.

moving forward, with reports already published that Tunis is seeking an urgent review of its trade deals with Ankara.[19]

Saudi Arabia and the UAE also see the potential to undermine the interests of regional rival Qatar. The Tunisian offices of Qatar-backed *Al Jazeera* remain closed, after this news organization became one of the first targets in the new Tunisian government's crackdown. Given the expectation that Saied will remain in power for the foreseeable future and will prohibit free and fair elections, Tunisia should be expected to strengthen relations with these two countries at the expense of Western backers.

Saied will likely be susceptible to this influence, especially if Saudi Arabia and the UAE prove useful in helping the country emerge from its current financial crisis. Its fiscal deficit reached 11.4% last year, with government debt reaching 88% of gross domestic product (GDP) at the end of 2020, and the rating agency downgraded Tunisia to a B- rating with a negative outlook.[20] Average economic growth stood at 1.5% through 2019, but last year the economy contracted 8.6%. Unemployment is verging on 18%, with youth unemployment clocking in at 35%. Thus, with Tunisia currently on the verge of default, needing at least $3 billion this year to pay down foreign debts and the wages of hundreds of thousands of public-sector employees, it will be left with little choice but to be guided by UAE and Saudi interests.[21]

This trend is even further pronounced by the expected hesitancy of Western governments to continue providing economic support. An International Monetary Fund (IMF) loan, which was meant to be for $4 billion is now frozen, and certainly won't progress in light of political circumstances and government-reform conditions that are part of IMF funding.

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[19] "Erdoğan Emphasizes Democracy in Call with Tunisia's Saied", *Daily Sabah*, August 2, 2021.

[20] "An economic recipe for unrest ignites in Tunisia", *Al-Jazeera*, July 26, 2021.

[21] "Tunisia's political crisis forewarns economic collapse", *Al-Monitor*, October 16, 2021.

Tunisia's future relations will thus be shaped by those that can help bail it out economically, which would in turn strengthen the perception of the new government in the eyes of citizens and especially the youth, who have been particularly vocal about the economic crisis and the handling of the COVID-19 pandemic.[22]

A similar strengthening of relations should be expected with Cairo, with Egyptian Foreign Minister Sameh Shoukry affirming, "The full support of the Arab Republic of Egypt for the stability and the fulfillment of the will of the Tunisian people", and noting that Tunisia is undergoing: "a historic moment, undertaken by a person who attaches the highest importance to the values of democracy, the constitution and institutions".[23] The logic behind Egyptian support is clear, with President Abdel-Fattah el-Sisi waging a similar battle against political Islam in the form of the Muslim Brotherhood and his ousted predecessor, Mohammed Morsi. Sisi, a former military general, also understands the importance of the West's former darling relying heavily on military rule similar to his in Egypt.[24]

Libya

The dissolution of Libya's social contract, which traded basic rights for petrol wealth, thrusted Libya into a fierce civil war in 2014. A tenuous cease-fire has been in place since June 2020, but it is unlikely that it will outlast the short term. Libyan society has fragmented along pre-state cleavages, with ordinary Libyans seeking to protect their rights and wealth. International intervention was decisive in ending the fortytwo year tyranny of

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[22] S. Speakman Cordall, "'People Are Hungry': Why Tunisia's Youth Are Taking to the Streets", *the Guardian,* January 20, 2021.

[23] "Egypt Vows 'Full Support' for Tunisian President", *Africanews*, August 4, 2021.

[24] "Egypt Is Again under Military Rule, but Sisi Lacks Nasser's Appeal", *Economist*, August 24, 2021.

Mu'ammar Gaddhafi in 2012. Shortly after this point, Libyan elites moved to capture a share of Libya's wealth, inviting a new set of international actors to Libya. In exchange for that help, these Libyans promised international actors a range of political and economic concessions. Numerous countries – prominently France, Egypt, the UAE, Turkey, and Qatar – sought out such parties, conducting covert operations within Libya and funding, arming, and training different Libyan factions. Turkey outright intervened in Libya in January 2020, dispatching over a thousand Turkish troops to the country in addition to an unknown number of Syrian mercenary fighters.

Today, Libya is best understood in a Venn diagram as the epicenter of multiple simultaneous and interlocking international competitions. The Libyan vacuum, in the absence of an international arbiter or preeminent political faction or figure, has invited international factions to incorporate Libya into their own visions for the region's geopolitical future, and to attempt to impose their own visions of order onto the region. The principal competitions involve: Qatar and Turkey on the one hand, and Egypt and the United Arab Emirates on the other, beginning with the Arab Spring; Turkey and France, which have fallen out over similar issues, in addition to growing disputes about migration and the Eastern Mediterranean; and Turkey and Russia, with the latter seeking leverage over the former, as has been the case for centuries.[25] The internationalization of Libya's second civil war has been and continues to be the key roadblock to the settlement of the Libyan crisis. The impasse is likely to continue for the foreseeable future.

Along with Turkey, Russia is one of the key protagonists in Libya's civil war. Russian strategists view Libya as a low-cost, high-reward theater for power projection, and as a useful form of leverage over Turkey and the European Union. Turkey views Libya as an essential component of its broader regional strategy.

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[25] See J. Mens, "Blue Homelands and Red Strongholds: The Libyan Civil War in Turkish and Russian Strategy", *Comparative Strategy*, vol. 41, no. 4 (forthcoming).

Russia views Libya as a crucial gateway to sub-Saharan Africa and the Mediterranean, and Russian publications regularly discuss resurrecting Gaddafi-era negotiations for a naval base in Benghazi and establishing an air base in Tobruk.[26] After the failure of the Libyan National Army's (LNA) offensive in 2019-20, Russia began covertly pushing for the partition of Libya, as doing so would enable Moscow to leverage its array of partnerships in the country.[27] When a cease-fire was reached, Russia embraced the status quo, as did the other supporters of the LNA: Egypt and the UAE.

Egypt and the UAE are highly unlikely to accept any solution that involves opportunities for political Islamism to take hold in Libya, or the presence of Turkish troops or political influence in Libya. Cairo began its stealth intervention in Libya in 2014 as Sisi saw in Haftar a natural ally to partner with to contain the perceived Islamist threat in eastern Libya and to protect Egypt's western border. A wave of terrorist attacks in the Sinai Peninsula prompted Sisi to provide Haftar with military and diplomatic assistance in January 2015. Egyptian involvement in the conflict has been closely coordinated with the UAE, which also views Libya as a central battleground for the shape of postrevolutionary states' orders and the role of political Islamist groups – such as the Muslim Brotherhood – which it has sought to repress both domestically and regionally. In the Libyan context, the UAE's goals have been the same as they have been elsewhere: expelling from Libya the foremost supporters of political Islam, namely Qatar and Turkey.

Qatar and Turkey are at the other end of the spectrum. For Turkey, the stakes are much higher than they are for Qatar, which has effectively been crowded out of Libya since 2014. Turkey sees a hegemonic presence in Libya as a necessary step to expand influence in the Eastern Mediterranean and Africa,

[26] R. Mustafin, "Nuzhny li Rossii voyennyye bazy v Livii", ("Does Russia Need Military Bases in Libya?"), *Nezavisimaya Gazeta,* January 19, 2017.

[27] M. Katz, "What's the Meaning of Moscow's Murky Moves in Libya", *Responsible Statecraft*, May 30, 2020.

two regions seen as critical to Turkey's international status, as outlined in the Blue Homeland doctrine.[28] Libya also is a key component of Turkey's energy plans,[29] and offers an estimated $16 billion in backlogged construction contracts.[30] Additionally, Turkey has worked to prevent Libya from adopting an Egypt-style secular authoritarian system. The 2013 coup in Egypt drastically eroded its influence in North Africa, and Turkey's ruling Justice and Development Party (AKP) is ideationally aligned with the Muslim Brotherhood.[31] Since January 2020, Turkey has deployed troops, tanks, Syrian mercenaries, drones, aerial defense systems, and electronic warfare systems to stave off an LNA offensive. When the October 23 cease-fire was declared, Turkey had established itself as the decisive international stakeholder in Libya.

In view of this impasse, the Libyan crisis will likely go through another round of fighting before a proverbial rock bottom is reached. Going forward, there are three likely outcomes in Libya.

The first and most likely is a condominium between Russia and Turkey, in which the interests of the two most present actors are accommodated. This outcome could involve a peaceful settlement or de facto partition of the country in which Russia preserves its influence in eastern Libya, and Egypt acquires an effective buffer zone in that part of the country; Turkey would be preeminent in the western area, and would retain some residual military presence, if not bases. Because of the existential interests of Egypt and Turkey, and the involvement of a panoply of external players, it is highly unlikely that a

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[28] A. Erdemir and P. Kowalski, "'Blue Homeland' and the Irredentist Future of Turkish Foreign Policy", *War on the Rocks*, September 30, 2020.

[29] S. Hacaoglu and F. Kozok, "Turkish Offshore Gas Deal with Libya Upsets Mediterranean Boundaries", *World Oil*, December 6, 2019.

[30] "Turkey Ready for Fast Reconstruction in Conflict-Torn Libya, Official Says", *Ahram Online*, June 19, 2020.

[31] A. el-Gomati, "Turkey: The Geopolitical Knot", in *The Great Game*, Sadeq Institute, 2021, pp. 48-51.

solution to the conflict could be reached without the agreement of both parties. As the impasse on the ground deepens, and despite the deep animus between both countries, the key players will likely come to an agreement behind closed doors. Because of their reliance on external support, their Libya proxies will have to play along. Because Europe has arrived to the party so late, and because the United States has been effectively checked out of the Libyan crisis since the murder of Ambassador Chris Stevens in 2012, there is little that can change the situation on the ground in favor of an alternative party. An entrenched Turkish and Russian presence in Libya is more likely than not in the long term.

The second option is partition, but this is unlikely. As outlined above, it is possible for Russia, Turkey, and Egypt to achieve the same result in Libya without de jure partition. Partition is widely opposed by Libyans and would draw more attention from the international community, particularly from the United States and the EU, than has to date been given to Libya. While Russia and Egypt, as outlined above, have considered this option, it is unlikely that Turkey would agree to this solution given the juridical implications that partition would have for its claimed energy rights in the Eastern Mediterranean; since 2019, Turkey has used an agreement with the Libyan government as the basis for expansive drilling claims in that area including in waters claimed by Greece. This agreement would be affected by partition, and Turkey would be unlikely to abide by the creation of another military dictatorship in North Africa, let alone one where Russian weapons systems could feasibly be deployed, affecting Turkey's ability to operate freely in the Eastern Mediterranean.

The third option is total victory, but this is highly unlikely. The extent of vested international interests is such that no single party could take over in Libya. More importantly, no single party is trusted within Libya. The last two decades have drained Libyans' confidence in their nascent political class and institutions. On the Libyan political scene, tribal, ethnic, and

geographic provenance are all sources of suspicion, making it unlikely that any single candidate or body could unify Libya's fissiparous body politic. Libya's heated constitutional debates and the seeming intractability of the constitutional question evidence this very point, and further contribute to the argument that contrary to the expectations of Haftar's backers, the end of Libya's twenty-year crisis will be neither quick nor painless.

Conclusion

Since the nineteenth century, North Africa has been subject to international intervention. Since then, the world has grown smaller and the Middle East and North African (MENA) region has evolved into a geopolitical arena in its own right. The traditional players in the region – France, the United Kingdom, Turkey, and the United States – continue to play a role. Yet newcomers such as Egypt, Saudi Arabia, the UAE, and Qatar are also playing a growing role in both ordering and destabilizing North Africa, each hoping to create national and regional orders in their own mold. This role will continue to grow across North Africa as the role of the United States becomes less certain, and as EU members continue to struggle to act decisively and in concert in the international arena.

The role of resources will, as ever, continue to play a significant role in organizing the region's politics and determining the interests of international actors. While the environmental, social, and governance transition in the financial arena continues at full steam, oil and natural gas remain important factors in determining international interest in the region, particularly as energy politics becomes a defining issue in the Mediterranean. Beyond energy resources, the role of rare earths and precious metals will continue to grow and may yet serve to attract China to a region with which it has not yet created deep ties. Resources will also have an impact on the ability of North African states to cooperate among themselves, as they compete for resources and foreign investment. As the push to economic

and political modernization continues to grow, particularly amid the energy transition, foreign investment will become more important than ever. The need for economic engagement will be yet another outlet for foreign influence.

Finally, the question of migration continues to loom large. While the EU has not been able to determine a common and coherent agenda for dealing with foreign policy, let alone with the North Africa region, the question of migration is one of profound importance to individual member states and to the political unity of the union writ large. As population growth and climate change continue apace, this question will become more acute over the course of the next decade. International intervention could see migration weaponized by Europe's adversaries, used as a tool for leverage and so-called grey zone warfare, and there will be a growing need for Europe to work out a framework to engage with those on its own doorstep.

Conclusions

Armando Sanguini, Karim Mezran, Alissa Pavia

When the Arab uprisings occurred over a decade ago in North Africa, the world watched in awe hoping to witness a political transformation in the region that would enable century-long autocratic regimes to evolve into free democracies. The images of protesters crowding the streets of Tahrir Square in Egypt and Habib Bourguiba Boulevard in Tunisia circulated among Western democracies where renown leaders, politicians, and civil society actors welcomed the calls for freedom. A new era of economic prosperity, political transformation, and social peace seemed set to become the new normal in a region where endemic corruption, conflicts, and repression were a daily occurrence.

Yet, a decade later, greater political instability, social unrest, and security threats permeate the region. The aspirations of many that flourishing democracies would emerge as a consequence of the uprisings faded. North Africa still faces many daunting challenges, among which transnational terrorism, illegal migrant smuggling, poor local governance, and lack of basic infrastructure pose serious threats to North Africa's economic, social, and political development.

As Zoubir and Abderrahmane note in chapter 1, fragmented regional politics are one of the many challenges. Since the Arab uprisings, national leaders have failed yet again to address their people's needs, namely greater political participation, good governance, and human security. Most North African countries are still ruled by authoritarian leaders or have failed

to produce outcomes for greater political stability. Algeria, for one, faced a renewed wave of unrest in 2019 when the *Hirak* movement led millions of Algerians to demand the resignation of then-President Abdelaziz Bouteflika. While the movement achieved the implementation of a new road map that led to *quasi-democratic* presidential and legislative elections and a constitutional referendum, the country still remains under strict military rule. Morocco also experienced its own Hirak in 2016; despite constitutional reforms, Zoubir and Abderrahmane note, Morocco remains an "authoritarian monarchy".

Tunisia may represent the saddest chapter yet when it comes to quasi democracies, democratic rule, and fragmented politics. Following nearly a decade of successful democratic rule after the fall of Zine el-Abidine Ben Ali, Tunisia may be undergoing a new form of authoritarianism: the current president, Kais Saied, froze parliament on July 25, 2021, and sacked the prime minister to fight alleged corruption among the ruling class elite. To this day, President Saied still rules by decree and is showing no signs of giving up power.

Libya is also no stranger to chaos and political instability. After three civil wars, a NATO intervention, and endless negotiations between the United Nations and local authorities, the country is still in a shambles. Elections are upcoming (scheduled for December 2021), but it is uncertain whether local elites are ready for them to take place despite international pressure, as Zoubir and Abderrahmane point out.

Trust for state institutions in North Africa has never been strong. Yet, as Biganzoli and Gagliardi note in chapter 2, the situation has managed to worsen in the past decade. "North Africa (and the MENA region more broadly) is one of few places in the world that has lost ground in terms of good governance," despite initial progress in the immediate aftermath of the Arab uprisings. Meanwhile, Arab Barometer data from 2019 and 2020 indicates that only 25% of North African citizens are content with their governments, and that personal rights and freedoms have experienced significant setbacks. Public

administration across the region is still largely underperforming as underscored by the poor quality of services and policies delivered.

Climate change and the need to transition toward renewable energy sources together represent another major obstacle for the region. In chapter 3, Liga calls North Africa one of "the world's most susceptible regions to global warming." While countries such as Morocco and Egypt have made significant progress in adding renewable energy capacity to help meet this challenge, others like Algeria, Libya, and Tunisia are not doing as well.

Algeria, for one, is heavily dependent on oil exports given its configuration as a rentier state. Even though energy transition for Algeria is "quite urgent", as Liga notes, the country's plan to reach 4,000 MW of renewables by 2030 is all but stalled as none of the necessary infrastructure has been built. Meanwhile, the protracted conflict in Libya has hindered all concrete plans for the country to adopt a comprehensive strategy for a renewable energy transition. Neighboring Tunisia's current share of renewables is stuck at a mere 6 percent of total energy supply.

Another key challenge facing North Africa in the coming decade is the need for regional cities to become sustainable hubs able to provide vital benefits to their citizens. As Abdullah and Elgendy note in chapter 4, "Cities have the potential to deliver economic, social, and environmental benefits to their residents," and thus bring about an improved quality of life. North Africa's urban transition has only recently been embraced by policymakers as critical for a prosperous and sustainable African future. The global average of urbanization in 2019 was about 56%, and North Africa reached that level that year, growing by almost two-thirds since the 1960s. However, North African cities do not provide citizens with the array of benefits typical of urbanization elsewhere. Unemployment and poverty are still high across the region. As Abdullah and Elgendy observe: "Today, North African cities are far from achieving sustainable and inclusive economic growth critical to improving living

standards for all by creating decent work opportunities with a
fair income, security in the workplace, and social protection".

The inability of North African governments to tap into
their large youth population, mainly due to their failure to
create enough jobs, represents another source of potential
instability for the future of the region. As Kabbani and Ben
Mimoune point out, the Arab uprisings were largely spurred
by younger generations asking for greater job security, better
futures, and more social representation. Well before these
movements, unemployment among the youth in North Africa
was among the highest in the world. However, as Kabbani and
Ben Mimoune highlight, 2011 did not bring about the change
many had sought. Only Morocco and Egypt were able to curb
the high unemployment rates among their youth, but these still
remain high in comparison to the global average. In contrast,
Tunisia's youth unemployment is still as high as before the
Arab Spring, and Libya's youth unemployment has reached an
unprecedented level of 49 percent, given the prolonged state of
conflict in the country.

Unfortunately, regional cooperation in North Africa also
remains a challenge. Although many experts and academics
alike agree on the high potential for the region to become an
economic hub, a mere 4 percent of the region's trade occurs
across North African countries, as noted by Zoubir and
Abdelrrahmane. The untapped potential for cooperation even
encompasses the security realm, where the lack of collaboration
and the protracted intrastate conflicts make the region prone to
the influence of external powers. This could not be more evident
than in the case of war-torn Libya; since the fall of Qaddafi
in 2011, Egypt, Qatar, the United Arab Emirates, Russia, and
Turkey have all attempted to exert influence on the future of
the country, either through direct military intervention or by
aiding fighters on the ground. Given the high stakes involved
in the Libyan conflict, as Jesner and Mens write, it is highly
unlikely "that any single candidate or body could unify Libya's
fissiparous body politic".

These challenges all paint a gloomy picture for the future of North Africa. The 2011 revolts brought about the hope – especially among Westerners – that a call for dignity, pluralism, and democracy was rising from North African citizens. Yet, ten years on, it is questionable whether these hopes were real, or whether the West misunderstood them to be more than just a short chapter in the history of these nations. Perhaps Western countries projected upon them their hope that democracy and freedom can, indeed, bring greater prosperity for the citizens of these nations. Tunisia is facing greater challenges than ever, with political instability and high unemployment rates still rocking the country. Many Tunisians long for the time when authoritarian regimes brought about job security and political stability. Democracy in Egypt led the Muslim Brotherhood to take power under Mohamed Morsi, only to see his demise two years later and the return of an authoritarian regime.

However, every reality can be perceived as either a glass half empty or half full, depending on the lens through which one choses to analyze phenomena. Democracy can be best viewed as a long journey with many "bumps" on the way, and the challenges North Africa faced this past decade are merely obstacles in a greater trajectory toward freedom and prosperity. No Western democracy became such without undergoing bloodshed, political entanglements, economic downturns, and waves of social unrest. North Africa is on a similar path and trajectory, as many of the authors of this report point out. The Tunisian people, as Zoubir and Abdelrrahmane suggest, are equipped with "the ability to forge a national consensus" that will enable them to move past Tunisia's latest shift toward authoritarian rule. Even though corruption is still prominent, countries in the region such as Morocco and Tunisia have made important steps forward to strengthen their anti-corruption legal frameworks, say Biganzoli and Gagliardi. Moreover, many countries in North Africa are making significant headway in the transition toward renewable energy, a leap which "could open new opportunities for sustainable economic growth and regional

integration", Liga notes. North African cities' socioeconomic and infrastructure development is enabling these urban centers to become "emerging transnational political" agencies, write Abdullah and Elgendy, while the upcoming "youth bulge" foreseen between 2025 and 2040 will give the region the opportunity to tap into the benefits of a young, educated, and healthy generation. The hopes and dreams raised by the 2011 revolts are not dead yet, but simply postponed.

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