CSIS | CENTER FOR STRATEGIC & INTERNATIONAL STUDIES | Middle East Program

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CONFERENCE REPORT

Building Stability through Economic Growth in the Maghreb

OVERVIEW

Governments across the Maghreb are struggling to address a wide range of socioeconomic and political grievances that sparked popular uprisings throughout 2011. The problems are rooted in political systems that have been marred by corruption, exclusion, and marginalization of large swaths of the population, including young people. Despite significant change in the last year, the region is still at the beginning of a long phase of transformation.

To better understand the political and economic factors shaping transitions in the Maghreb (defined here as Morocco, Algeria, Libya, and Tunisia) and opportunities for spurring economic growth, the CSIS Middle East Program convened a half-day conference in Washington, D.C., on June 13. Because states dominate most economies in the region, the conference examined both government strategies to address a range of economic challenges and the role that trade and investment could play in promoting growth. The conference brought together high-level U.S. government officials, diplomats, and leading experts in academia and business. The following report summarizes the views and ideas discussed at the conference.

KEY POINTS

- All regional governments must simultaneously manage short-term economic crises while addressing the long-term socioeconomic challenges that inspired popular uprisings throughout the Arab world. These long-run challenges include job creation, housing, education, and government transparency.
- The endurance of the Moroccan and Algerian governing systems makes their short-term management tasks more orderly than those of the emerging new governments in Tunisia and Libya.
- Politics and economics are closely linked to one another in the Maghreb, with states driving economic policymaking. Government responses to problems vary according to their fiscal and political frameworks, although many of the underlying problems are quite similar.
- Europe's economic recovery will be an important factor shaping the Maghreb's economic growth prospects.

PARTICIPATING SCHOLARS

CSIS would like to thank and acknowledge the experts who spoke at the conference. This group's rich and varied experience in government, policy research, business, and academia provided unique insights through which to view the region.

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- Opportunities for greater regional trade and investment already exist and must form a foundation for future efforts, despite political and ideological differences. The Western Sahara conflict is an enduring obstacle to regional integration.
- The United States can support political transitions and economic recovery by partnering with European allies and Arab governments, supporting foreign direct investment, promoting greater transparency, providing asset recovery assistance, and fostering trade.

MACROECONOMIC LANDSCAPE

2011 was a difficult year economically for the Maghreb states. The European financial crisis, a decline in tourism revenues, and the rise of global commodity prices combined to drag down regional economies, which also face long-term structural challenges. While Morocco and Algeria managed the economic fallout of regional upheaval relatively well, Tunisia and Libya were hit hard when their governments fell, and economic recovery remains uncertain.

Of all the countries in the region, Algeria has seemed the most impervious to change. Despite a range of socioeconomic challenges similar to its neighbors, Algeria, a hydrocarbon exporter, benefited from high oil prices throughout 2011. Those prices allowed Algeria to increase public spending and maintain overall stability. The inflation rate of 4.5 percent only slightly outpaced economic growth, which hovered at 2.5 percent. Algeria continues to enjoy a large balance of payments surplus and healthy foreign currency reserves of approximately $180 billion.[1]

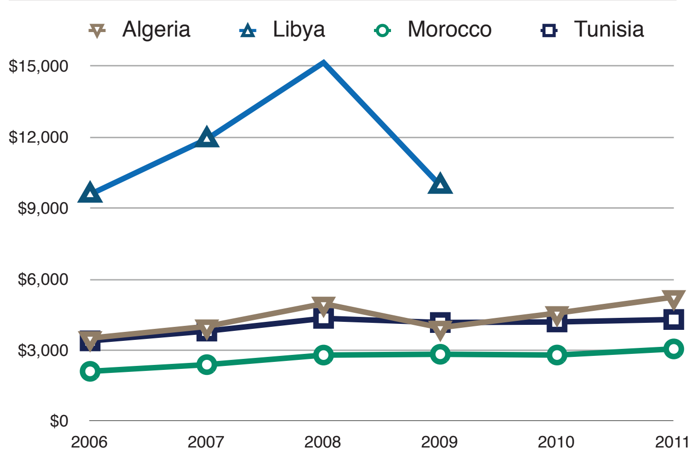
Morocco, a country with fewer resources, has navigated a difficult economic environment partially due to effective management of economic policy. Morocco saw approximately 4 percent growth—the highest rate in the Maghreb in 2011—while inflation remained close to 2 percent.[2] The impressive numbers came despite the fact that the country is an oil importer and suffered a decline in tourism receipts and remittances, along with a worsening of external accounts in 2011. Beneath the headlines, deeper problems loom. Solid macroeconomic performance and overall increases in wealth mask a growing income gap between rural and urban areas and youth unemployment close to 30 percent.

Tunisia was hit hardest in 2011, as political turmoil caused negative economic growth and a decline in external accounts. The country also suffered from falling exports to the European Union and Libya and the loss of almost half of tourism receipts.[3] Indeed, tourism revenues in the first quarter of 2012 were the lowest in a decade.

Libya did not fare much better. Accurate economic indicators for Libya are difficult to assess given the ongoing uncertainty. Some analysts estimate that Libya's GDP declined by 60 percent, though most of this is due to falling oil exports.[4] Despite the sharp drop in GDP, Libya's balance of payments did not suffer much because imports declined at the same time that exports (primarily oil) also declined.

While short-term specifics differ among countries, the structural challenges they face are more similar. Job creation is one of the most important keys to future stability. Labor and employment policies are mismatched in the Maghreb as they are in most of the Middle East, and addressing the

Figure 1. GDP per capita for Maghreb Countries 2006-2011 (US dollars)



Source: World Bank

1. International Monetary Fund, "World Economic Outlook Database," 2012, http://www.imf.org/external/pubs/ft/weo/2012/01/weodata/index.aspx.
2. Ibid.
3. Sana Ajmi, "Latest Tunisian Export Figures for 2011," *Tunisia Live*, March 29, 2012, http://www.tunisia-live.net/2012/03/29/latest-tunisian-export-figures-for-2011/.
4. Martina Fuchs and Andrew Torchia, "IMF Says Libya GDP to Halve in 2011, No Aid Talks Yet," Reuters, October 26, 2011, http://www.reuters.com/article/2011/10/26/us-mena-imf-idUSTRE79P4PU20111026.

skills mismatch between university degrees and private-sector needs will require greater cooperation between the public and private sectors. Moreover, governments will need to formulate policies for encouraging the growth of small- and medium-size enterprises (SMEs).

Governments will also need to tackle income and wealth disparities and address tax and subsidy policies, which generally favor wealthier citizens. Internal regional disparities in Tunisia, Libya, and Algeria, as well as in the rural areas of Morocco, also pose challenges to long-term development. Beyond job creation and income gaps, governments are facing difficult decisions in terms of financial sector reform and business regulation. How regional economies integrate more effectively with the global economy will remain a key long-term challenge.

Amid these problems, there is still no successful and enduring economic model for the Maghreb. States remain firmly at the helm of economic decisionmaking, while regional economic policies reflect a complex mix of socialist and free market instincts. Governments and elites fear losing the benefits of one if they wholly embrace the other. These calculations take place against an equally complicated political landscape, which is shifting but still tends to structure economic policy in a state-centered way.

POLITICAL-ECONOMIC ENVIRONMENT

Many of the structural pressures on governments throughout the region are largely similar. Yet the solutions employed by each government are unique because of different political frameworks, experiences, priorities, and assets. Since the outbreak of popular uprisings in 2011, every state in the region has held elections. These elections and other evolving political dynamics shape the economic environment and are inexorably linked throughout the region.

Morocco responded to the regional uprisings quickly, adopting a new constitution in mid-2011 and holding parliamentary elections in November 2011. The Islamist Justice and Development Party (PJD), which campaigned on a platform of good governance and economic growth, won a plurality of seats and formed a coalition with the Istiqlal and several smaller parties. The challenge for the new government will be managing expectations that they can deliver higher growth and create jobs in a system where the existing power structure limits the government's ability to shape policy independently. Despite Morocco's important constitutional reforms, the monarchy retains key levers of power and a large stake in the country's economy.

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At the same time, there is also room for debate and reform. For example, the new Moroccan government is taking on the delicate issue of subsidies, which are poorly targeted and a drain on the country's finances. However, if subsidy cuts hurt the poor and middle class, the PJD risks losing support among key constituencies. How the PJD-led government works with the opposition—and, more importantly, cooperates with the monarchy—will help shape the direction of Morocco's economic policies.

In Tunisia, noticeable economic improvement likely will be delayed until a more stable and permanent political system takes root. The Islamist Ennahda Movement won a plurality of seats in the October 2011 elections for a Constituent Assembly, and it subsequently formed a coalition with two secular-leaning political parties, the Congress for the Republic and Ettakatol. The country is still in the midst of drafting a new constitution, a process that began in February 2012 and has an 18-month time frame for completion.[5] Despite relative progress, impatience over the slow pace of change and tension between ultraconservative Salafis and secularists have led to greater uncertainty and political divisions.

How Tunisia addresses its economic challenges will largely depend on political stability and the struggle unfolding between the Central Bank and Ministry of Finance over a proposed stimulus package. The Tunisian Central Bank's priority is keeping inflation in check, while the Ministry of Finance seeks to expand government spending in order to stimulate the economy. The government is under pressure to provide public-sector jobs and recently announced that

5. Hamadi Redissi, "Tunisia: The Difficulties of the Coalition," *Tunisia Live*, March 3, 2012, http://www.tunisia-live.net/2012/03/03/tunisia-the-difficulties-of-the-coalition/.

approximately $320 million in the 2012 budget will be dedicated to job creation.[6] Moreover, the government has announced an additional $3 billion for development and infrastructure programs in Tunisia's interior, which suffers from underdevelopment compared to the coastal region. Looking forward, the government must also address Tunisia's large informal sector, corruption, and smuggling. In order to spur investment, the government will also face difficult decisions on financial sector reform and finding new ways to extend capital for domestic investors.

> Negative public perceptions of past economic reform efforts constrain the political viability of introducing bold new reforms.

Libya's political and economic environment remains similarly in flux. The newly elected national assembly is mandated with drafting a new constitution, yet growing violence and armed militias challenge its authority. Additionally, separatist sentiments continue to plague the interim government's efforts and have fueled a nationwide debate about federalism and the distribution of resources.

Libya's economy is monolithic and almost entirely dependent on the hydrocarbon sector. How the government cooperates to harness the country's oil wealth and spread resources throughout its main regions will shape Libya's future stability. By August 2012, Libya's oil production grew to nearly 1.6 million barrels per day (bpd) according to Libyan officials, on par with Libya's production shortly before the collapse of the Muammar el-Qaddafi regime. Despite the progress, concerns still linger over Libya's ability to sustain current levels of oil production and the willingness of foreign players to continue betting on the country's fragile political transition.

Algeria is as politically complex as its neighbors but has witnessed much less change. The country has great potential as a hydrocarbon exporter and is home to a resourceful population, yet statism, protectionism, and a fear of foreign involvement all hinder economic policy. This combination has made Algeria resistant to economic reform, creating a sclerotic economic environment and a single government-led spending strategy to stimulate growth and maintain stability.

Algeria's hydrocarbon wealth, state control of the economy, and large foreign currency reserves allow the government to distribute resources and launch large-scale spending projects to manage public discontent and economic problems in the short term. In 2010, the government approved a $286 billion spending package, including $156 billion earmarked for new infrastructure and housing projects.[7] In addition, the government increased public-sector salaries, including the salaries of police and security forces. The government's strategy effectively amounts to responding to short-term crises through increased spending, with no sustained strategy to solve the underlying problems. As a result, Algeria has been rocked by hundreds of isolated riots over a range of grievances including jobs, housing, commodity prices, and water. Independent union strikes have also increased, creating a tense environment, with no sign of abating.

One factor that could exacerbate tensions and hinder the government's ability to spend is a sharp decline in energy prices. The oil and gas sector accounts for approximately 95 percent of export earnings and 60 percent of government revenues.[8] A decline in oil prices in the 1980s sparked an economic crisis that led to the ill-fated political opening and ensuing civil war that lasted nearly a decade. The experience left a deep scar on Algeria. Since then the country has stabilized and benefited from high hydrocarbon prices, generating approximately $50 billion per year.[9]

Beyond hydrocarbons, the informal sector, which accounts for an estimated 45 percent of non-hydrocarbon GDP,[10] remains an impediment to economic reform. When the government attempted to impose regulations on the informal sector in January 2011, it sparked widespread riots over

6. Sana Ajmi, "4.6 Billion Dinars of 2012 Budget Allocated to Tunisia's Interior Regions," *Tunisia Live,* April 27, 2012, http://www.tunisia-live.net/2012/04/27/6-2-billion-dinars-of-2012-budget-allocated-to-tunisias-interior-regions/.

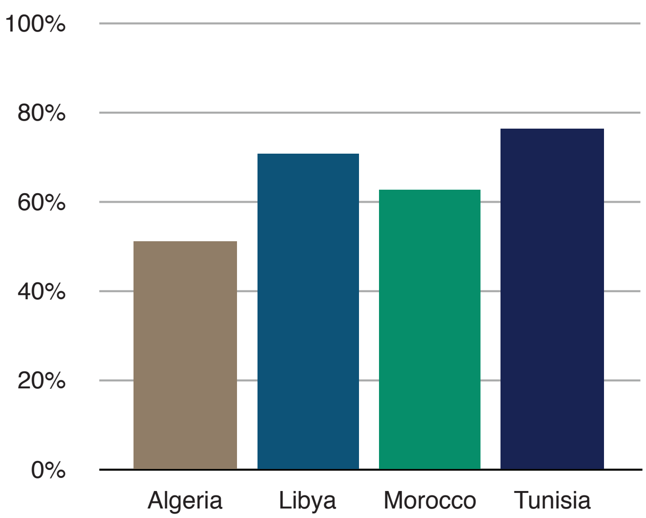
7. Algeria Infrastructure Summit, "Infrastructure Investments in Algeria," Algiers, September 16–17, 2012, http://www.algeriainfrastructuresummit.com/infrastructure-investments-in-algeria/.

8. World Bank, "World Databank," 2012, http://databank.worldbank.org/data/Views/Reports/TableView.aspx.

9. Ibid.

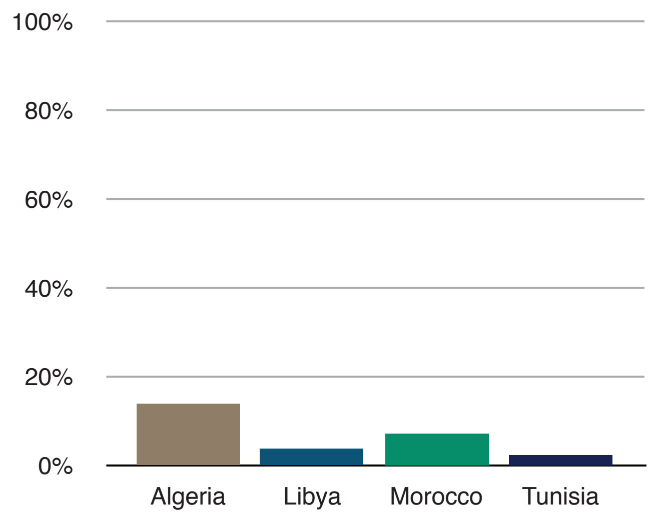
10. International Fund for Agricultural Development (IFAD), 2011 Governing Council, "Fact Sheet on Algeria, 2011," http://www.ifad.org/events/gc/34/nen/factsheet/algeria.pdf.

Figure 2a. Maghreb Countries' Overall Trade with the European Union in 2011 (percent)



Source: International Trade Center

Figure 2b. Maghreb Countries' Overall Trade with the United States in 2011 (percent)



Source: International Trade Center

fears that the cost of basic goods would increase. The government quickly backtracked and sought to stabilize prices. The problem of entitlements, especially the strong preference for public-sector jobs over those in the private sector, also remains a serious challenge. More broadly, the non-hydrocarbon sector is not expanding quickly enough, posing additional challenges for Algeria's economic prospects beyond oil and gas.

In all of this, Algeria lacks the kinds of political forces that might otherwise create pressure for economic reform, as in other countries. President Abdelaziz Bouteflika is popular, and while mistrust of government and political parties runs deep, parliamentary elections in May 2012 strengthened the ruling National Liberation Front (FLN) party and sidelined Islamist political parties that had expected to repeat the victories of their neighbors in Morocco and Tunisia. Islamist political parties have few options other than to boycott the parliament to protest their electoral defeat. After decades of participation in the parliament, they have a stake in the political system, though members of the banned Islamic Salvation Front could still pose a challenge from outside the system.

As political and economic forces evolve in the Maghreb, a major lingering question is the precise influence that new political forces will have on old economic structures. This is especially true in light of the fact that negative public perceptions of past economic reform efforts constrain the political viability of introducing bold new reforms. In Tunisia, for example, the cronyism associated with privatization programs implemented by the Zine al-Abidine Ben Ali regime has undermined the legitimacy of liberal economic reforms more generally. Across the Maghreb, many view structural adjustment programs and other reforms championed by political elites since the late 1980s as having contributed to the economic inequalities that prompted the uprisings of 2011. These perceptions limit politicians' options. The potential for regional economic cooperation is perhaps greater than ever, but so is the uncertainty regarding political outcomes. In all of this, the progress Maghreb countries have already made on trade and investment is a useful starting point for understanding what may be harder or easier to achieve in the future.

TRADE AND INVESTMENT CLIMATE

The Maghreb is notorious for its small amount of intraregional trade, which accounts for only about 3 percent of the region's total trade.[11] While conventional wisdom suggests that local economies are redundant and competitive, they may actually be complementary, potentially constituting an "economic force multiplier" and a strong foundation for

11. World Bank, "Trade Offers Path to Growth and Integration: Maghreb Countries Committed to Increasing Regional Trade," press release, June 14, 2012, http://www.worldbank.org/en/news/2012/06/14/trade-offers-path-to-growth-and-integration.

greater regional economic cooperation. The lack of such economic integration now is due less to economic factors and more to political ideologies and conflict that lead to suspicion of foreign economic involvement. A pervading sense of economic pragmatism also plays a role, as it leads local businesses to focus on European markets rather than those of other North African countries.

One of the biggest political impediments to greater regional economic integration is the simmering conflict in the Western Sahara, which has exacerbated Algerian-Moroccan tension. The conflict has effectively kept the Moroccan-Algerian border closed since 1994, restricting the flow of goods and people between two neighbors that are linguistically and culturally close. Despite the ongoing political tension, there are reasons for optimism. In August 2011, Algeria agreed to sell 640 million cubic meters of natural gas to Morocco via a pipeline that transits Moroccan territory.[12]

At the same time, businessmen from Algeria and Morocco are conducting more business with one another and becoming an informal constituency in favor of greater regional trade and economic cooperation. Whether or not this group actually forms the basis for such integration remains to be seen. For now, though, the private business community does not seem to be subject to the same political roadblocks that hinder the development of official economic ties.

Beyond Algeria and Morocco, there are other positive signs. Moroccan banks and information technology companies are active in Tunisia, which Moroccan companies see as an increasingly important market. In addition to opportunities in the Maghreb, some companies see growth markets beyond the borders of North Africa. Moroccan companies in particular—primarily in the banking, telecommunications, and manufacturing sectors—are looking for opportunities in francophone sub-Saharan Africa and finding receptivity. Business transactions benefit from the existence of Moroccan banks in Africa, as well as regular flights, relaxed visa policies, and few barriers to investment. Since 2005, exports from Morocco to sub-Saharan Africa have grown by approximately 19 percent per year, thanks in large part to the expansion of Morocco's banking sector into these regions.

12. Sylvie Rantrua, "Accord Commercial: l'Algérie va fournir du Gaz Naturel au Maroc," *Marchés Tropicaux & Méditerranéens*, August 2, 2011, http://www.mtm-news.com/article/3526/accord-commercial-l%E2%80%99algerie-va-fournir-gaz-naturel-au-maroc.

Moroccan companies investing in sub-Saharan Africa face higher risk than in the Moroccan domestic market, especially given the unrest and political turmoil in many of these countries. Even so, industry executives report that higher profit margins and the opportunity for greater diversification make sub-Saharan Africa attractive.

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While Moroccan businesspeople are willing to explore untapped markets, Maghreb governments often prefer foreign investment over domestic capital. In early 2012, for example, a Renault car factory near Tangiers in northern Morocco began manufacturing cars for local and export markets. The Moroccan government played a direct role in convincing Renault to build the plant, which employs over 2,000 local workers and supports a network of feeder industries in the area.

The investment climate differs widely from country to country, however. In Algeria, for example, the country's history of colonialism has created a deep concern about foreign intervention. Multiple barriers to foreign investment persist in Algeria, leading to a net decline in foreign investment over the last few years. The banking sector is underdeveloped, and investment laws, such as the windfall tax on energy profits by foreign companies, create disincentives for investment. Corruption and transparency issues, which exist throughout the region, compound the problem.

China has also been active in the region, having built longstanding relationships with Algeria and Libya, primarily in the hydrocarbon, construction, and telecommunication sectors, and more recently with Morocco. China has also become an increasingly important trade partner. Morocco, for example, runs a large trade deficit with China, and inexpensive Chinese textiles imports have nearly destroyed Morocco's textile industry. Over the past few years domestic Moroccan manufacturers have adapted to some degree through increased cooperation with European designers. One particular model is "fast fashion," where digital Moroccan designs and finished products can be delivered to European markets with a short turnaround, providing a service and quality that give them an edge over Chinese manufacturers.

It remains to be seen how outside investors will respond to the political transformations underway in the region. Though the election of Islamist parties to power may lead to pessimistic risk assessments, some foreign investors may be willing to accept higher degrees of risk in exchange for an early foothold in these emerging economies, especially in Tunisia and Libya. In Morocco, the PJD's electoral commitment to improving economic performance and good governance could help build investor confidence over time. The performance of Islamist parties in power will ultimately shape foreign investors' assessment of the risks and opportunities of Maghreb markets.

THE U.S. ROLE

The United States has little political influence over events and political trends in the Maghreb. Still, it is committed to and interested in assisting Maghreb countries to capitalize on their opportunities and manage difficult transitions. Recognizing these limitations is important as the United States seeks to engage with governments and people in the region. The United States has leverage and considerable expertise to share in the economic realm.

In addition to numerous bilateral support programs and private initiatives, the United States assists countries in the region through the Deauville Partnership. The partnership was established under the auspices of the G8 to provide a multilateral platform to work with regional countries seeking to strengthen reforms. The partnership is focused on four main areas: economic stabilization, job creation, good governance and transparency, and trade and investment.[13] In addition to the G8 and other members, Maghreb countries participating in the partnership include Tunisia, Morocco, and Libya.

As part of the partnership, the United States is promoting the expansion of the European Bank for Reconstruction and Development (EBRD) to help provide additional capital for local investment and support market reforms, including a transition fund with potentially up to $4 billion in funds over the next three years.[14] The U.S. government is also working on the asset recovery process and providing published materials in Arabic to explain the legal aspects and procedures. Training for small businesses is also important as the United States works to boost the capacity of local businesses to export to U.S. markets.

More broadly, the U.S. government is taking a long-term perspective on regional transitions and emphasizes the need for building transparent economic and political systems. Establishing rules-based systems is crucial for investment, private-sector growth, and citizens' participation. A shift toward greater transparency is a vital underpinning of economic growth and long-term political stability.

KEY QUESTIONS AND TAKEAWAYS

- **What is the new economic model for the region?**

For many years, governments chose between socialist-oriented or free market economic models. Today, socialist models have been largely discredited, while the privatization that flows from free market models is controversial and divisive. In the absence of any clear model, governments will likely pursue populist economic policies for the foreseeable future, including government employment plans, subsidies, cash transfers, and lower interest rates. At the same time, seeking out a clear model is critical to finding the right balance between short-term economic remedies and long-term economic transformations.

13. Partnership countries include Canada, Egypt, the European Union, France, Germany, Italy, Japan, Jordan, Libya, Kuwait, Morocco, Qatar, Russia, Saudi Arabia, Tunisia, Turkey, the United Arab Emirates, the United Kingdom, and the United States. See Office of the Press Secretary, "Fact Sheet: G-8 Action on the Deauville Partnership with Arab Countries in Transition," White House, May 19, 2012, http://www.whitehouse.gov/the-press-office/2012/05/19/fact-sheet-g-8-action-deauville-partnership-arab-countries-transition.

14. Office of the Spokesperson, "Fact Sheet: Deauville Partnership with Arab Countries in Transition—Expansion of the European Bank for Reconstruction and Development," U.S. Department of State, May 21, 2012, http://fpc.state.gov/190769.htm.

- **What role will Islamist political parties play in shaping economic policy?**

Islamist political parties have won elections in Morocco and Tunisia and formed governments with secular coalition partners. So far there has been no specific push for introducing Islamic economic policies in the Maghreb, yet there is potential for Islamic banking to grow and coexist in parallel with conventional banking systems. Regardless, it is still unclear whether political Islam can provide a platform for more coherent economic policies, and whether those policies would help or hinder greater economic growth, job creation, investment, and transparency.

- **How will European recovery affect the Maghreb's economic growth?**

Europe's economic recovery will have a major impact on the Maghreb's economic growth, but the precise extent of that impact remains uncertain. The Maghreb is dependent on Europe for export markets, worker remittances, tourism, and investment. Nearly 65 percent of the region's trade is conducted with Europe, and in the cases of Tunisia and Morocco the figure is closer to 80 percent. The European financial crisis has had a direct impact on the Maghreb's economic performance since 2010: tourism receipts have declined, exports to European markets have slowed, and local banks have less capital, thereby limiting potential domestic development. For energy producers, declining demand in Europe, the Maghreb's biggest energy market, remains a particular concern.

- **What is the right balance of U.S. engagement to help shape regional transitions?**

The United States has limited leverage over political outcomes in the Maghreb but it can play an important role in the economic sphere. U.S. assistance must be part of a broader partnership with the region. The United States and other countries can provide expertise, guidance, and support, but ultimately regional governments must take the lead in deciding how to address their challenges and chart their own course.

CONCLUSION

The Maghreb holds great potential. In many countries, expectations run high that new governments can deliver on their promises of better governance and economic opportunities. There is still no consensus on the necessity or parameters of economic reform, however. Old and new governments alike will face numerous dilemmas as they continue to navigate a new environment of popular activism while balancing a complex combination of short-term priorities and long-term structural challenges. The choices they make today will have a lasting impact shaping the next generation.

While the private sector in some countries is already playing a larger role, governments will ultimately set their countries' economic courses for the foreseeable future. Those transitions will be lengthy and costly processes as governments and elites negotiate the parameters of reform. Economic factors helped spur regional uprisings in 2011, and economic factors will be crucial to building stability in the Maghreb. How governments respond to the demands of their people and the economic strategies they choose will shape the Maghreb in the months and years ahead. — HM

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