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Socio-economic response to Covid-19: challenges and opportunities for selected North Africa countries

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Executive Summary

In the absence of effective therapies and vaccines, North African countries, as elsewhere, have taken comprehensive containment measures to limit the spread of COVID-19 such as closing airports and maritime boundaries, suspension of non-essential activities and stay-at-home orders. The first priority was clearly to keep people as healthy and safe as possible. But, by putting societies and economies on hold, these measures have led to unprecedented economic losses - at least in the short term. Moreover, the pandemic has not only shattered lives, but also exposed the competence (or lack thereof) of governments in formulating and implementing public health and economic decisions. This policy brief provides some of the challenges and considerations necessary to make these decisions that respond directly to COVID-19 while simultaneously sustaining strategic choices. In particular, it discusses what more could governments do for mitigating the public health and socioeconomic impacts of the health crisis and how to make COVID-19 a catalyst or accelerator of a momentous economic and social restructuring.

1. Introduction

A few months ago, very few of us could have imagined a world in which drastic restrictions on public and social life, which would seem extreme in normal times, would be implemented by governments. But these are not normal times. The Covid-19 crisis will be remembered for many things, most notably for the loss of lives and widespread economic disruptions. Also, in the field of its global governance, since early March, policies have been rapidly changing which highlights both the political relevance and the great uncertainty associated with public health risk. To counter this risk, it was necessary to develop the capacity for anticipation, together with the capacity for rapid adaptation and response. Clearly, the Covid-19 pandemic has not only shattered lives but has also exposed the competence (or lack thereof) of governments in formulating and implementing public health and economic decisions. The pandemic has revealed inequalities related to the policies imposed, to the

capacity for anticipation of authorities, to the availability of health services, to the characteristics of people infected (age, gender and ethnicity) and towards other factors.

If policies imposed to fight the virus such as social distancing are overwhelmingly justified in high-income societies in the absence of effective therapies and vaccines, they could, however, have adverse effects in low- and middle-income countries. At the same time, the demand for anticipation, preparation, and quick response is the same for citizens everywhere. Tackling Covid-19 needs strong governance and leadership, as well as a capacity for adaptation and regular interaction with the population. But are all countries prepared for tackling the Covid-19 pandemic? And what choices are being made to address such threatening pandemic? In this policy brief, we are interested in the case of the North Africa region (in particular Algeria, Egypt, Morocco and Tunisia). Since the start of the outbreak, Algeria and Egypt seemed more likely to be exposed to Covid-19 due to their direct links and high volume of travel with China. At present, however, it seems that most vulnerable countries may not be those with the earliest onset and as they deal with the crisis, the strength of the state capacity reveals both its ability to control the pandemic and of what happens subsequently. The outcome also appears to be uncorrelated to wealth. At the regional scale, each country has reacted in a relatively similar way to the outbreak trying to get the most out of the limited time and scarce resources available. However, the comparison between the North African countries shows differences in the strictness of response measures for containing the virus (see Figure 1). For instance, stringent measures which were put in place by Morocco within the first three months of the pandemic were at the high end of Oxford's Covid-19 Government Response Stringency Index^[1]; the country had implemented by end-March a total lockdown that persisted in subsequent months and in which individuals could only leave their homes to buy food or seek medical care. However, to date, it remains unclear to what extent these unprecedented measures have been successful in changing country-specific evolutions of the pandemic. This is because even if the countries that have adopted drastic restrictions have seen the number of cases increase at a much slower rate during the confinement period, they are still considerably impacted. Not by coincidence, these measures that are necessary for mitigating the spread of Covid-19 by contributing to saving lives, have led to unprecedented economic losses - at least in the short term. So far, to support economic activity, governments have deployed discretionary targeted measures or broader programs. In this policy brief, we suggest what more could be done for mitigating the negative effects of containment measures.

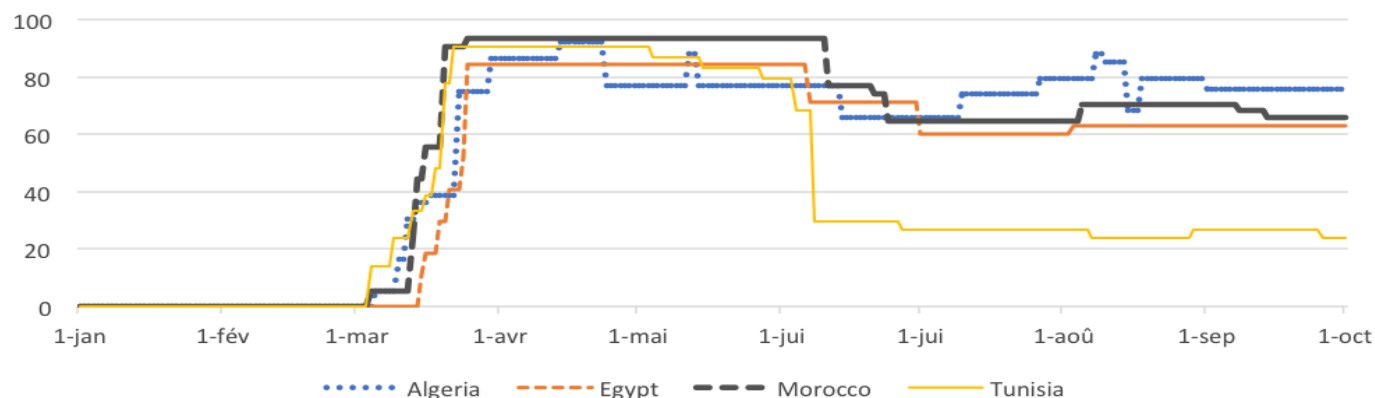
2. Overview of the context

2.1. Pandemic control policies

Since the onset of Covid-19, the North Africa countries have engaged efforts to provide timely responses to both the public health emergency^[2] and the subsequent potential economic and financial crises. To control the spread of the virus, they have sought to manage weaknesses in their healthcare systems^[3] (in terms of number of hospital beds, capacity of intensive care units, number of skilled health professionals, etc) and to make decisions regarding how to allocate scarce resources without engendering social disruptions. Measures have ranged from closing airports and maritime boundaries, to suspension of non-essential activities and stay-at-home orders. The stringency of such measures (see Figure 1) effectively led to lowering or stopping the spread of the pandemic in its very early stages. However, by starting to gradually relaxing containment measures (from early June 2020 in Algeria, Egypt and Morocco, and early May in Tunisia) while planning to "coexist" with Covid-19 in the coming months, the number of new cases per day began to accelerate. In the meantime, as the Covid-19 pandemic continues to spread and people are forced to stay home, complementary policy interventions have been implemented by governments at different times and in a non-uniform manner at the nationwide level, ranging from improved diagnostic testing and contact tracing, isolation and quarantine for infected people to measures linked with human mobility reduction and physical distancing rules.

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Figure 1. Government Response Stringency Index



Source: Thomas Hale, Sam Webster, Anna Petherick, Toby Phillips, and Beatriz Kira (2020). Oxford COVID-19 Government Response Tracker, Blavatnik School of Government.

Arguably, the stringent containment measures which are the most effective in curbing both infections and deaths, are also the most costly in economic terms. This explains why the countries of the region have put in place fiscal, monetary and social insurance policies since the beginning of the pandemic to mitigate the impact of a health crisis. For instance, Moroccan authorities have created an emergency fund dedicated to the management of the pandemic, of about 3 percent of GDP, financed by the government and by voluntary contributions from public and private entities; in Tunisia, an emergency plan (\$0.71 billion or 1.8 percent of GDP) was announced on March 21 (IMF, 2020^[4]). Overall, the various plans announced by governments could cost 5% of GDP in 2020, possibly much more if the pandemic was to stay.

2.2. Key socio-economic and political features of North Africa countries

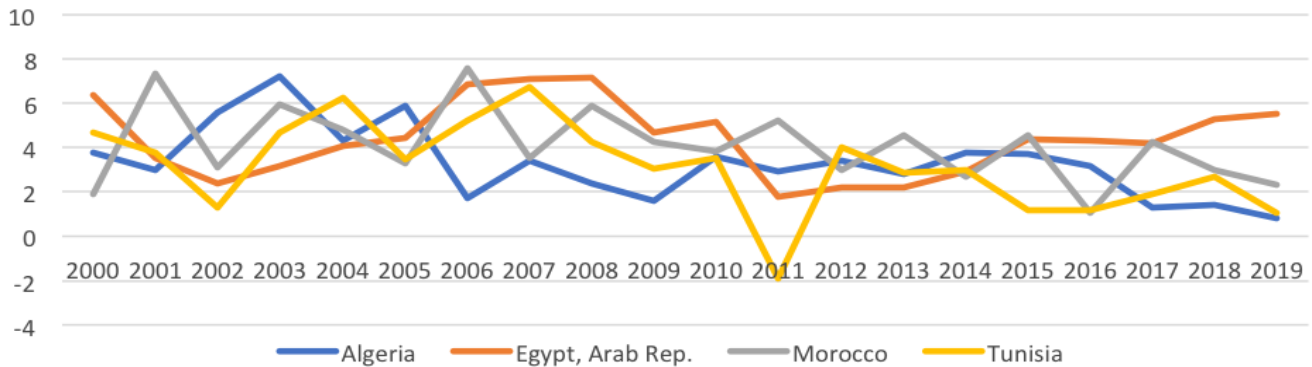
The pandemic is proving to be a revealing test for the countries studied, for it places extraordinary demand on the political leadership and conditions the survival of entire political systems as well as the stability of many countries. This means that even if such countries have seen a short-term momentum in unity, such crisis might erode their stability in the medium term with the potential decline in government revenues and in employment figures. This could happen because, when the virus arrived in the region in a post-Arab Spring context, people were already engaged in complex debates about the development of their countries and all aspects of society seemed to be at stake including the nature of the political systems themselves (World Bank, 2020).

Will the measures to address the spread of the virus and its economic consequences become a possible threat to social cohesion in the future? In fact, while significant measures are taken to deal with the coronavirus, public decisions are operating within limits and realities.

First, this health crisis comes at a time of weakening economic growth in most countries in the region (see Figure 2), mainly due to the repercussions of the 2008 economic crisis, repeated cycles of droughts, the dramatic drop in oil prices (for oil-exporting countries such as Algeria), regional insecurity after the Arab Spring movements of 2011 (in particular, the risks of insecurity related to periodic terrorist attacks), and a fragile regional political environment. This translates into increasing unemployment, especially among the youth and women. Unemployment seems to affect more than 21 percent of the youth in Tunisia and almost 22.8 percent in Egypt (AfDB, 2018). Covid-19 and containment measures to deal with it are certainly having short-term negative effects on the economy and employment. Border closures and other mobility restricting measures have impacted the tourism sector (that has a large weight in the economy of the

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Figure 2. GDP growth (annual %)



Source: World Bank, World Development Indicators

region except for Algeria)^[5]. In parallel, there were simultaneous cuts in demand and production of goods and services. According to the annual forecasts of the High Commission for Planning (HCP), Moroccan GDP would be contracted by 5.8% in 2020 and unemployment rate would reach 14.8 percent, an increase by 5.6 points compared to 2019 (HCP, 2020). In Tunisia, GDP is projected to fall by 6 or 8.2% depending on the existence of a second virus outbreak during the year (OECD, 2020).

Second, before the Covid-19 crisis, progress toward restoring macroeconomic stability (reducing budget deficit, adjusting balance of payments, and ensuring exchange rate stability, together with decreasing the unemployment rate) had been accompanied by a rise in inflation in countries such as Egypt and Tunisia, fuelled mainly by a sustained weakening of currencies since 2015, and partially driven by the phasing-out of subsidies. Note that inflation in these countries had begun falling since end-2019 and early 2020 until the Oil Price War (after it registered an average of 19.6% in the previous three years in Egypt for example), due partially to the general decline of global commodity prices, including oil.

At the same time, countries in the region such as Algeria and Egypt have chosen in recent years to reduce or remove subsidies while introducing cash transfers for the most vulnerable people (AfDB, 2018). Understanding the implications of Covid-19 requires taking a closer look at these transformational reforms and shedding light on their effects on well-being, vulnerability and the populations' ability to cope with shocks. Particularly, in the case of Egypt, within the framework of the "economic reform program" launched in 2014 and the government's \$12 billion loan agreement with the International Monetary Fund signed in 2016, the country has implemented wide-ranging economic reforms to stabilize its economy and address macroeconomic imbalances. This has pushed to a gradual elimination of subsidies (with the introduction of direct poverty-targeted cash transfer programs like the Takaful and Karama programs and changes to the existing Baladi, bread allowance, and Tamween, food smartcard^[6], programs), and a decrease in public expenditure on health and education. However, spending on the poverty-targeted cash transfer programs since 2015 does not appear to help mitigate the loss in purchasing power due to inflationary pressures as well as to contain the increase in poverty, as poverty in Egypt has been steadily increasing over the past years. The share of the poor measured using the national poverty lines rose from 25.2 percent in 2010 to 32.5 in 2017-18^[7]. The Covid-19 pandemic emphasises the importance of advancing both the human capital agenda and the country's crucial need to strengthen social protection.

Third, while societies have been united in the fight against Covid-19, there are enormous existing economic, social and spatial inequalities that the pandemic would be worsening while also creating new ones. For instance, income inequality is high in the North Africa countries, although with significant country variations. The shares of national income held by the richest 10% are the highest in Morocco (nearly 32% in 2013), followed by Egypt (26.9 percent in 2017), Tunisia (26.6 percent in 2015) and Algeria (22.9 percent

in 2011)^[8]. The share is 12 times higher than the share of national income held by the poorest 10% of the population in Morocco. In turn, Tunisia's level is 8 times higher, Egypt's is 7 times higher, and Algeria's is 6 times higher. In addition, labour markets in these countries are crucial to determine income and social inequalities. For example, the share of informal employment in total employment is still very important, being particularly high among women and in the agricultural sector. Informal workers are excluded from the social security system and less protected against negative shocks than workers in the formal sector. With the current Covid-19 pandemic, whereas informal sector jobs were particularly vulnerable to lockdown measures, formal ones were relatively shielded, which means that inequality is expected to rise. Also, the livelihoods of the poor in these developing economies often depends on the informal economy. Generally, informal employment, defined based on having no work contract or no social security, constitutes about 70 percent of employment in the Middle East and North Africa region (World Bank, 2020). Specifically, in Egypt and Tunisia, informal employment is estimated at 50% (World Bank, 2020). This explains why during the Covid-19 crisis, in countries like Egypt and Morocco, informal sector workers have been explicitly supported through cash transfers ^[9] since the containment measures have exposed them to the risk of not having any income at all.

Also, spatial disparities continue to be an enduring feature in these countries. Indeed, the profile of the poor shows that the place of residence continues to be a strong predictor of both monetary poverty and non-monetary deprivation. For example, in Egypt, while about a third of the population was considered poor in 2015, in the governorates of Upper Egypt this share of the poor rises to two-thirds (World Bank, 2019).

Lastly, there are good reasons to be concerned with the political instability experienced just before the Covid-19 pandemic by some North Africa's regimes as that of Algeria. The latter had undergone a forced transition more than a year preceding the health crisis ("Hirak" protest movement). This revealed flaws in Algeria's ruling system and forced it to reinvent itself and its social contract with the Algerian people. Also, close attention will have to be paid to the impact of Covid-19 on fragile political transitions as in Tunisia, where the successive coalition governments have failed to further socio-economic opportunities for the population since the «Arab Spring» uprisings.

3. Mitigating the socio-economic consequences of the pandemic and preparing for recovery

3.1. Some challenges in North Africa

As highlighted previously in the brief, governments have a crucial role to play in establishing the necessary conditions for addressing strategic challenges that we know about. Today, certain considerations should guide each country's approach when identifying and implementing actions in response to the Covid-19 pandemic:

First, in the North Africa countries both households and firms have limited access to credit and often households hold limited savings or « buffer stock » of precautionary savings to smooth out future consumption. This suggests that lower-income households are most vulnerable to cyclical fluctuations in income. For instance, in some MENA economies such as Egypt, household debt has remained low, at less than 10 percent of GDP in 2016 (International Monetary Fund, 2017). Many of the announced monetary policy measures taken during the Covid-19 crisis correctly encourage loans to households and firms, through the financial system and the public grant. But there is real doubt about the efficacy of these measures, particularly in ensuring that firms and households will temporarily have better access to finance. This is because financial institutions have adopted a high prudential behaviour for a long time. In Algeria, for example, its central bank announced (on April 30, 2020) that it was cutting its main policy rate from 3.25 to 3.00 percent, that it was lowering its reserve requirement ratio from 8 percent to 6 percent, and that it was lowering haircuts on government securities used in refinancing operations.

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Second, existing social protection programmes are less effective in supporting individuals and workers in these countries. In fact, they have limited social insurance schemes for work injury, pensions or indemnity pay and maternity cover. The population engaged in the informal sector and rural work (such as temporary and domestic work, self-employment, and employment in agriculture) has remained excluded from formal social protection unless eligible for some social assistance programmes, mostly with lower coverage and benefits in the MENA region (IPC-IG, 2017). One concern is that even if coverage varies across countries, it is estimated that up to 65 per cent of the population in Morocco, Algeria and Tunisia may not be covered by social insurance (IPC-IG, 2017).

Third, policymakers increasingly view safety nets systems (particularly cash transfers such as Takaful and Karama in Egypt and Tayssir in Morocco) as having the greater utility in reducing poverty than other types of social protection. But they still need to be further expanded to reach all poor households. There is also a need to focus on building social protection systems that can flexibly respond to covariate shocks as natural disasters and cyclical drought. Climate change will increase the frequency and severity of weather-related shocks. Also, a key challenge of shock-responsive social protection programmes is their coverage (eligibility thresholds) and benefit levels that are so low as to limit the support such programs can provide in times of crisis. Their eligibility criteria, their adaptability, their anticipatory capacity and the assessment of vulnerable households remain open to improvement.

Lastly, the lack of comprehensive national social registries in the region is a key challenge to enhancing systems' responsiveness. Yet, the registry coverage varies significantly across the North Africa countries. Before the Covid-19 pandemic crisis, Egypt took steps to build social registries, which are important tools for extending coverage beyond the target group of a specific program (Tebaldi, 2019). The current crisis has also helped other countries as Morocco to take such steps.

3.2. A time of great transformation?

The Covid-19 pandemic is far more than a health crisis. It is a human, economic and social crisis. Given that development trajectories in the long-term will be affected by the choices countries make now, responses to this crisis have to effectively mitigate its immediate negative effects but leaders must also keep an eye towards the future. There is also a need to assess what has happened so far and to identify strategic priorities. This will guide to prepare for the inevitable fundamental changes that lie ahead and make Covid-19 a catalyst or accelerator of a momentous economic and social restructuring, as it provides an opportunity to tackle broad challenges.

In the short term, the main aim is to respond to those situations that could threaten the lives of the populations and the normal functioning of the economic, social, and institutional lives of countries. Many North Africa countries have already taken decisive actions that serve as a good basis. These include measures such as expanding government spending in health services (e.g., by allowing necessary resources to ensure adequate staffing, testing and prevention, and often guaranteeing virus-related health-costs coverage). Still, there is also an opportunity to enact adequate health system reforms to ensure the provision of coverage for all who need it. Also, targeted measures to support households and businesses are urgently needed such as granting cash transfers to vulnerable households and suspending electricity payments in affected areas. But this may not be enough. In view of the increasing spread of the crisis, the focus must also increasingly be on stabilising the economic situation of firms and workers by especially protecting jobs and supporting small and medium-sized firms by, among other measures, covering basic fixed costs or providing credit. Furthermore, the priority should also be on helping firms in the most affected regions and sectors. Support could take many forms such as reduction or temporary suspension of tax or debt payments. The Moroccan government has taken measures in this sense by allowing, for example, social transfers to employees temporarily unemployed and by deferring social contribution payments for some sectors (including tourism). At the same time, there

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may exist concrete actions and targeted support for specific sectors that incentivise innovative changes, for example, by encouraging more investment in the care economy and advancing a greener and gender-equal economy.

Beyond the immediate crisis response, the success of post-pandemic recovery will be determined by a better focus on what happens at the country level. This includes, as noted earlier, efforts to boost the shock-responsiveness of social protection systems, to address the problem of informality, etc. But it is also vital to redefine social protection programmes and their sources of funding. In practice, social assistance to vulnerable groups would generally be funded through taxation while social insurance is financed through employer/employee contributions (this is not the case in many low-income countries where external financing represents an important source of funding for social assistance). Nevertheless, a common feature of North African countries is that they mobilise only a small share of their revenues through taxation, and face many tax-policy challenges. For this, advanced digital technologies can help improve both shared and own revenues, which can restore sustainability to their public finances, as well as improve the quality and efficiency of their socio-economic programmes. Lack of skills creates, however, distrust and resistance to digitalisation, which poses significant challenges for many countries in the North Africa region, which is also constrained by insufficient physical infrastructure and financial resources to improve the digitalisation process. Their capacities to deal with the challenges of digitalisation vary widely both across and within countries. It is thus essential to provide adequate weight at the national level to regional digital inclusion in public investment choices and invest in public services and other measures that reduce inequalities. As was declared by the UN Secretary General, Antonio Guterres, “the pandemic has reminded us, in the starkest way possible, of the price we pay for weaknesses in health systems, social protections and public services”. It is interesting to note that, in some cases, the pandemic has enhanced digital inclusion response. For example, in Morocco, the pandemic seems to have accelerated the digitalisation transformation of its public sector by digitalizing public administration and services delivery in order to ensure continued services essential to the life of citizens. Furthermore, although in North Africa countries, access to, and use of, the internet varies significantly within countries, Moroccan citizens’ Internet usage has remained at the highest level in the region since 2010. In fact, the percentage of households with Internet access in Morocco have shown steady growth, rising from 0.37% of the total population in 2002 to almost 70% in 2018 (from 1.43% to 46% in Tunisia, from 0.27% to 74% in Algeria and from 8% to 51% in Egypt)^[10].

The Covid-19 crisis serves as a reminder of the crucial need to support transition from the informal to the formal economy. This is an important step towards promoting decent work and supporting the shock-responsiveness of social protection systems, as informal workers are often excluded from social insurance and from most social assistance. A growing number of emerging economies have implemented policies addressing informality by concentrating on extensive labor market reforms, streamlining and simplifying registration and licensing procedures, simplifying taxes on small businesses (World Bank, 2019), facilitating access to commercial buyers, etc. In the North Africa, it will probably be necessary to have appropriate policies that recognise the importance of the informal economy, restrict and regulate it. The informal sector accounted for about 38 and 40 percent of total GDP in Morocco and Tunisia respectively (IMF, 2018). Some examples of potential actions targeting informal economy actors can be useful, including establishing an agency for micro-credit lending to the informal sector.

Notes

[1] Nine indicators used to calculate the Stringency Index are: school closures; workplace closures; cancellation of public events; restrictions on public gatherings; closures of public transport; stay-at-home requirements; public information campaigns; restrictions on internal movements; and international travel controls. This composite measure is a simple additive score of these sub-indicators measured on an ordinal scale, rescaled to vary from 0 to 100.

[2] For an interesting overview of public health policy responses to Covid-19 in North African region, see:

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<https://www.oecd.org/coronavirus/policy-responses/covid-19-crisis-response-in-mena-countries-4b366396/> and <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19>

[3] Note that since 2000, all these countries have increased the proportion of total public expenditure allocated to health. There is little to differentiate between these countries in term of total spending on healthcare that remained within a narrow band of 4-6 per cent of GDP in 2000-2017.

[4] See IMF's policy tracker that summarises the key economic responses of various countries (updated on September 25, 2020): <https://www.imf.org/en/Topics/imf-and-Covid19/Policy-Responses-to-COVID-19>

[5] Note that the global disruptions caused by Covid-19 will have a weigh on remittances into the North Africa region, particularly from Europe and Gulf. Remittances are an important source of income for the economy of Egypt, Morocco and Tunisia. Interestingly, Egypt is the fifth-largest recipient of remittances in the world.

[6] In 2018, the government has increased the allotment on the food ration cards from LE 21 to LE 50 per person per month. For more detail about these programs see Ibarra et al (2019).

[7] The average official poverty line was 736 EGP per capita per month or approximately USD \$3.80 per day (2011 PPP US\$).

[8] Note that in these countries, estimates of Gini index are based on published household survey data, where top income can be either unreported or underestimated. In a country like Egypt, the Gini index suggests inequality is low. However, measures of inequality that are not based on consumption surveys show inequality to be higher (Alvaredo and Piketty, 2014).

[9] For instance, there was in the case of Egypt EGP 500 (US 32) compensation for three consecutive months starting April 13 is offered to 1.5 million workers registered at the database of the Ministry of labor and Manpower. In Morocco, the cash transfer program offers between 1000 dirhams (US 103) per month depending on family composition until June.

[10] See data provided by the United Nations specialized agency for information and communication technologies "ITU", available at :<https://www.itu.int/net4/ITU-D/icteye/#/compare> (assessed 9 October 2020)

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CMI-FEMISE “COVID-19 MED BRIEFS”

The recent coronavirus crisis threatens the health, economies and societies of all countries, regardless of level of development. In the South Mediterranean countries the fight against the pandemic is even more complicated. It must be done with limited health and economic resources compared to other regions. In addition, it takes place in a unique social and geopolitical context.

Cooperation and EU-Med strategies in key sectors are needed. Therefore, CMI and FEMISE have decided to join forces and launch this series of Policy Briefs to pave the way for thematic analyses and prescriptions, which will be explored throughout this series.



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