



# Regional Baseline Assessment

Region I: Algeria, Morocco and Tunisia

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This report is a baseline assessment of Mediterranean countries in Region I (Algeria, Morocco, Tunisia) and regional conditions for green and circular businesses. It contains a brief overview of the political framework as well as the economic and socio-cultural context.

The countries analysed show similarities in terms of GDP per capita, geography (comprising coastal areas, agricultural and forest areas and desert areas), culture but are different in terms of population size, distribution of GDP by sector of economic activity and availability of natural resources. The three countries face common economic and social challenges such as macroeconomic stability, reduction of the unemployment rate, human development and food security.

Socio-economic indicators	Algeria	Morocco	Tunisia
Population (in millions) <sup>1</sup>	42,6	35,2	11,7
GDP per capita (in USD)	4237	3359	3423
10-year average annual GDP growth (in %)	2,6	3,1	1,8
Agriculture and fishing (% GDP)	12	12	10
Industry (% GDP)	6	16	15
Building and civil engineering (% GDP)	12	6	4
Hydrocarbon (% GDP)	19	<2	2
Tourism (% GDP)	1,7	7	6 à 7
Unemployment rate (in %)	12,1	9,0	15,5

<sup>1</sup> The Global Competitiveness Report 2019

All three countries have a relatively small ecological footprint, as well as moderate greenhouse gas emissions, and face environmental challenges, such as water scarcity and the generation of waste. Morocco and Tunisia must also face the shortage of primary energy resources.

Environmental indicators	Algeria	Morocco	Tunisia
Ecological footprint (gha/capita)	0,9	1,1	1,0
Share of renewable energy consumption (%)	0,1	11,3	12,6
Annual carbon dioxide emissions (tons/capita)	3,70	1,74	2,65
Municipal waste (kg/capita /year)	309	217	222
Municipal waste recovery rate (recycling + composting + energy) (%)	7	8	9
Certified organic agricultural area in % of the useful agricultural area	0,013	2,18	6,3
Internal renewable freshwater resources (m <sup>3</sup> /capita in 2014) <sup>2</sup>	289	848,1	379,2
Fertilizer use (kg per ha of arable land) <sup>3</sup>	22,3	71,1	59,3

<sup>2</sup> <https://databank.banquemondiale.org>

<sup>3</sup> <https://www.theglobaleconomy.com>

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There are similarities between the three countries when it comes to waste treatment. The most common disposal method is landfill. Recycling rates are relatively low even though Morocco has achieved a recycling rate of 46% for certain wastes such as metals. This situation shows that there is significant potential for saving primary raw materials through the use of circular material from recovered materials. In this perspective, the national waste management strategies in the three countries aim to reduce waste at source and increase recycling and recovery rates by improving collection and recycling infrastructure and legal framework governing the management, control and disposal of waste. It is therefore appropriate to support green and circular businesses that contribute to waste management at local and regional level.

Agriculture is an important economic sector for the three countries which have succeeded in achieving food self-sufficiency for most market garden and fruit products but are struggling to achieve it for basic products such as grains, sugar and oilseeds. Morocco stands out with 100% coverage of all its meat and milk needs. Driven by a dynamic of international markets in favor of organic products, Tunisia has considerably increased its certified organic cultivated areas, Morocco has opted instead for the exploitation of wild (non-cultivated) areas offering spontaneous naturally organic products. In Algeria, organic agriculture is developing timidly but remains the country which uses the least fertilizer for agricultural production.

In summary, this baseline assessment is a brief assessment of the political, economic and socio-cultural context based on a literature review as well as a survey of national stakeholders. This is not an exhaustive study, but simply highlights some important (policy) elements that are relevant for green and circular businesses.

# 02 Policy and regulatory framework



## General

Algeria, Morocco and Tunisia, like the countries of the Mediterranean, are resolutely committed to a dynamic of sustainable development. This development is an objective enshrined in the constitutions of the three countries.

The three countries have developed their national strategies for the environment and sustainable development, and have signed or acceded to the majority of international conventions, treaties and agreements in favor of sustainable development and protection of the environment. They are gradually translating their international commitments into their national policies through the development of legislative and regulatory mechanisms framing and supporting sustainable development.

The three countries are also committed to an energy transition towards renewable energies and energy efficiency and have developed ambitious strategies in this area. They have also drawn up their national climate plans.

Along with these national strategies and plans which represent the overall policy framework, the three countries have developed sectoral policies and specific strategies in favor of the green and circular economy (CE).



## CE national strategies and action plans

Specifically, the three states have included the circular economy in their strategies, plans and programs and in 2015 developed, as part of the SwitchMed program, their national framework plans for sustainable consumption and production patterns (PCN-MCPD).

The Algerian government has made a commitment, in its 2020 action plan, to update and implement the MCPD national action plan, to develop sustainable agriculture and fisheries, to support the creation of activities.

The Moroccan government, in its 2017 government program, committed to the elaboration of regional and provincial development plans, based on the green economy, to the introduction of new financial incentives for the benefit of new SMEs and startups that investment in promising sectors.

Tunisia has adopted intersectoral strategies in favor of the circular economy, in particular the national green economy strategy (SNEV) based on sustainable agriculture, integrated waste management, promotion of sustainable tourism, energy efficiency and renewable energies.



## Tax and financial instruments

Several taxes are instituted to reduce the consumption of resources or the production of waste, as well as fiscal and financial advantages to stimulate the creation of businesses.

Algeria has introduced the energy efficiency tax, the tax on the sales of energy products to manufacturers, the tax on new tires, the tax on oils, lubricants and lubricating preparations the use of which generates waste oils, tax on plastic bags and tax to encourage the removal of special and / or hazardous waste. In addition, since 2016, the state has gradually lifted subsidies on energy (electricity, gas, and fuels) by increasing unit prices as well as the VAT rate which rose from 7 to 19%. On the other hand, Algerian legislation has provided for tax exemptions and reductions for individuals working in the collection of used paper and household waste as well as other recyclable waste. In addition, there are a host of grants and tax and financial benefits to stimulate and support the creation and development of businesses and start-ups.

Morocco provides, on the one hand, for a number of taxes, in particular, the tax on the extraction of quarry products, internal taxes on energy products, the special tax on cement, the ecological tax on plastics, the special tax on concrete reinforcing bars, the special tax on sand and, on the other hand, tax exemptions and reductions such as the reduction in VAT on economy cars, on solar water heaters and total exemption and permanent income from non-fruit tree plantations intended to preserve soils from erosion. There are also tax relief measures, particularly for new businesses as well as for self-employed persons, with favourable taxation varying only from 0.5 to 1% of turnover.

Tunisia has provided for several taxes directly or indirectly related to the environment: the environmental protection tax (TPE) (tax imposed on manufacturers and importers of plastic raw materials and polluting products), the tax on energy management, the consumption tax on essences and oils as well as the tax on organic rest paid on the local turnover of producers of fishery products. At the same time, the new legal framework for investment provides for a sustainable development premium, reduced tax rates on the profits of companies specializing in the collection, transformation, recovery, recycling or treatment of waste and waste. garbage, financial incentives for investment in organic farming and aid to crews and owners of fishing units ceasing all activity during the period fixed for organic rest. Further profit tax cuts are planned to stimulate business creation.



### **Waste recovery**

Algeria developed its national waste management strategy in 2001 (broken down into PROGDEM and PNAGDES) which is currently being revised to evolve into a new national integrated waste management strategy (SNGID) by 2035. The framework The legal framework for waste management is structured around Law 01-19 of 12 December 2001 relating to the management, control and elimination of waste and a set of implementing texts. This law introduced the principle of extended producer responsibility. However, the application of this principle is only partially effective and only for a few products, in particular, plastic bags, oils, lubricants and lubricating preparations, new tires, for which producers (or importers) pay a tax which contributes, in part, to the National Environment and Coastal Fund (FNEL). In addition, the National Waste Agency (AND), partially funded by FNEL, is responsible for organizing and continuously improving the “Eco-Jem” system for the collection and recovery of packaging waste, in bringing

together waste generators, collection companies and recycling, recovery or waste disposal companies.

In 2018, Morocco developed a new National Waste Reduction and Recovery Strategy (SNRVD) aimed at initiating circular economy practices at the territorial level by developing waste recovery channels that create green jobs. This strategy provides, among other things, for strengthening the legislative, regulatory, institutional and financial framework; the promotion of waste reduction as well as communication, awareness raising and civic education. Morocco has a legal framework constituted by Law n ° 28-00 relating to waste management and their elimination (Dahir n ° 1-06-153 of November 22, 2006) as well as a set of texts of application in particular decree no.2850-15, of August 10, 2015, setting the specific requirements relating to the collection and recovery of used batteries, which implemented the principle of extended producer responsibility for the battery sector used.

Tunisia introduced, in 1996, the principle of extended producer responsibility (EPR) through Law n ° 96-41 of 10 June 1996, relating to waste and the control of its management and disposal. The application of this principle has enabled Tunisia to organize 04 PWR sectors, in particular the public system for the recovery and recovery of used packaging “ECO-Lef”, introduced in 1997; the “ECO-ZIT” public system for the recovery and regeneration of used lubricating oils, introduced in 2002; the “Eco-Battery” public management system for used accumulators, introduced in 2005; and finally the used tire management system, introduced in 2015. These REP Sectors are not managed by eco-organizations created by the producers but they are public systems managed by the National Waste Management Agency and financed by the producers. In addition, the National Strategy for Integrated and Sustainable Waste Management, drawn up in 2006, and currently in force, aims to reduce the quantities of waste and promote waste treatment through recovery and recycling.

These legal frameworks and strategies have the effect of stimulating waste recycling activities and therefore favourable to the circular economy.



### **Sectoral approaches**

#### **Public-private partnerships (PPP)**

Algeria does not have an institutional and legal framework specifically dedicated to PPPs. These are governed by the investment code and by laws specific to each sector of activity. This approach is not yet widespread but has been implemented in the water, transport and energy sectors.

Morocco has a long experience in the field of partnership with the private sector in several fields, such as energy, transport, higher education, water and sanitation, waste management as well as the agricultural sector. These partnerships are governed by Law No. 86-12 on Public-Private Partnership contracts (promulgated on December 24, 2014); Law No. 54-05 on the delegated management of public services (promulgated on March 16, 2006) as well as other sectoral laws.

<sup>4</sup> <http://www.igppp.tn/fr>

<sup>5</sup> <http://www.igppp.tn/sites/default/files/Manuel%20des%20Projets.pdf>

In Tunisia, these partnerships are managed by the IGPP<sup>4</sup> which registered, in 2018, a list of 33 projects<sup>5</sup> particularly in the energy, water and environment sectors, such as projects for wastewater treatment plants, sea water desalination, the waste transport and recovery project in Tunis and Djerba, the waste recovery projects in Bizerte, Gabès and Sousse, the combined cycle steam station in Skhira with a capacity of 480 MW, etc. These PPPs are governed by Law No. 49-2015 of November 27, 2015 on public private partnership contracts as amended by Law No. 2019-47 of May 29, 2019 on improving the business climate.

### Agriculture and fishing

In Algeria, among the fundamental objectives of agricultural orientation, the object of Law No. 08-16 of August 3, 2008 on agricultural orientation, is to guarantee the development of economically and socially useful and ecologically sustainable agriculture. To achieve this objective, the law provides, among other things, for the establishment of a quality system which makes it possible to certify specific conditions for the production and / or manufacture of organic farming products.

In terms of fishing, the national strategy for the promotion of responsible fishing included in its action plan the establishment of fisheries development and management plans, the strengthening of the regulatory system relating to management and conservation of fishery resources, improvement of knowledge of fishery resources, the installation of artificial reefs for the preservation and conservation of resources, the establishment of the VMS system for monitoring and control and the conclusion of “responsible fishing pacts” with professionals. Since 2009, Morocco has adopted the Green Morocco Plan which is a development strategy for the sector based on the safeguard of natural resources for sustainable agriculture. To this end, the authorities have drawn up a fairly comprehensive legislative and regulatory framework in order to develop organic farming. In addition, in 2015, Morocco developed, as part of the SwitchMed program, the ten-year sectoral plan for sustainable agriculture and food which is part of the national framework plan for MCPDs.

Regarding the fishing sector, the development and competitiveness strategy of the Moroccan fisheries sector “HALIEUTIS 2020” is designed around three basic principles, in particular the sustainable exploitation of resources for future generations. To this end, all fisheries, of commercial interest, are managed on the basis of quotas and the flows controlled throughout the value chain.

In Tunisia, the agricultural and rural development policy aims at modern agriculture ensuring food security while taking into account the control of the use of water resources and the protection of the natural heritage. In this context, the agricultural policy has been structured around sectoral programs, in particular the “agricultural production, quality and safety of agricultural and food products” program. In this program, emphasis has been placed on strengthening organic farming. Thus, the national strategy for the development of the organic farming sector (2015-2020) was drawn up and articulated around the development of organic sectors, the creation of pilot zones specializing in organic farming and bio-tourism circuits and finally, strengthening of export capacities of



<sup>6</sup> H.E. Chebbi, J.-P. Pellissier, W. Khechimi, J.-P. Rolland. Rapport de synthèse sur l'agriculture en Tunisie. [Rapport de recherche] CIHEAM-IAMM. 2019, pp.99. hal-02137636.

<sup>7</sup> Plan d'action national sur les modes de production et de consommation durables en Tunisie | 2016. Plan d'action décennal agroalimentaire 2016 - 2025

<sup>8</sup> La lettre de l'ONAGRI volume 1, n°3, trimestre 3 - 2015

Tunisian organic products<sup>6</sup>. This strategy is based on an appropriate legislative and regulatory system, in particular Law No. 99-30 of April 5, 1999 on organic farming, which set the rules for production, preparation and marketing according to organic methods, and which instituted a system of control and certification. In addition, in 2016, Tunisia drew up, as part of the SwitchMed program, its ten-year action plan on sustainable production and consumption patterns in the agrifood sector<sup>7</sup>.

In the area of fishing, as part of its policy of preserving fishery resources, Tunisia has adopted a strategy to combat anarchic fishing. This strategy is based on technical conservation measures (standards and conditions regulating the use of fishing gear, fishing zones and seasons, nature and size of species) as well as means of monitoring, control and surveillance of activities. fishing (satellite monitoring of vessels, on-board monitoring operations, etc.)<sup>8</sup>.

### Manufacturing industry sector

With the exception of the legislative and regulatory measures governing solid, liquid or gaseous discharges in order to avoid industrial pollution, or subsidies for the establishment of an ISO 14001 or ISO 50001 management system, there is no this sector, for the three countries of the region, specific policies to promote the circular economy, in particular to encourage sustainable procurement, eco-design, industrial symbiosis or the functional economy. In Tunisia, Law No. 35-2018 of June 11, 2018 on corporate social responsibility, encourages companies to adopt sustainable practices.

### Tourism

In Algeria, the Ministry of Tourism developed, in 2014, the Algeria Tourism Quality Plan (PQTA) which provides for the attribution of the "Quality Tourism Algeria" mark to tourist establishments that meet a set of requirements, particularly those relating to water and energy saving as well as good waste management. This voluntary quality approach is financially supported, in part, by the state. In addition, the tourism sector is governed by the master plan for tourism development as well as by laws relating to the sustainable development of tourism; the general rules for tourist use and exploitation of beaches; to expansion areas and tourist sites.

In Morocco, the tourism strategy is part of an integrated approach to sustainable development, respectful of the environment and of socio-cultural authenticity. Thus the tourism sector has developed a sustainable tourism program. This program aims to enhance natural and rural resources while preserving them, and to ensure respect for the socio-cultural authenticity of host communities by offering them socio-economic benefits.

The policy of the tourism sector in Tunisia aims to diversify the tourism offer, in particular through the encouragement of investment outside traditional tourism areas. In this context, a strategic study on the development of ecotourism was finalized in 2009 and which identified a relatively significant potential for the development of this sector in Tunisia<sup>9</sup>. In addition, as part of the SwitchMed program, Tunisia prepared, in 2016, its ten-year action plan on sustainable production and consumption patterns in the tourism sector<sup>10</sup>.

<sup>9</sup> <http://www.environnement.gov.tn/index.php/fr/135-contenu-fr/environnement-en-tunisie/-ecotourisme/260-etude-strategique-pour-la-promotion-de-l-ecotourisme-en-tunisie>

<sup>10</sup> Plan d'action national sur les modes de production et de consommation durables en Tunisie | 2016. Plan d'action décennal tourisme 2016 - 2025.

## Buildings and construction

In Algeria, this sector is governed by law n ° 90-29 of December 1, 1990 relating to development and town planning, amended and supplemented, as well as a large number of regulatory texts relating to technical building regulations, as well as construction technologies. If the social and environmental dimension are necessarily taken into account in town planning and architectural production, in particular to reduce the footprint of buildings on the ground with environmental value, the use of sustainable materials or green construction techniques, is not regulated.

In 2015, Morocco developed, as part of the SwitchMed program, the ten-year sectoral action plan for eco-construction and sustainable buildings, which is part of the national framework plan for sustainable consumption and production. This plan aims to take greater account of resource efficiency in architectural design, a design of low-carbon and climate-resilient buildings and improvement of the internal environment (optical, acoustic, thermal comfort and quality of the air).

In Tunisia, good practices in terms of MPCD in buildings are mainly linked to the implementation of actions aimed at energy efficiency. International cooperation programs for the development and promotion of eco-construction are underway and aim to strengthen construction laws and rules for the benefit of eco-construction through the integration of aspects related to eco-construction in Tunisian regulations and the proposal for legal texts promoting the development of eco-constructed buildings. In addition, a study was launched by the Ministry of Local Affairs and Environment for the establishment of the National Sustainable Cities Program in Tunisia<sup>11</sup>. This study, which is in its last phase, defined the promotion of constructions with a better ecological footprint in cities as a strategic objective in line with the vision of a sustainable city in Tunisia.

<sup>11</sup> Étude pour la mise en place du Programme National Des Villes Durables en Tunisie. Rapport Exécutif de la deuxième phase de l'étude: Projet (scénario) de programme national des villes durables en Tunisie : Modèle d'approche de transition de la ville tunisienne au statut de ville durable. Avril 2020.

### Sustainable public procurement

Public procurement represents more than 20% of GDP in Algeria, between 15% and 17% of GDP in Morocco and around 15% of GDP in Tunisia. They are indeed an important engine of the economy in these countries.

In Algeria, public procurement is governed by the public procurement code. This code does not include specific requirements for the acquisition of circular / sustainable products or services. Public procurement for such products and services is practically non-existent, with the exception of the renewable energy sector where the order is significant in view of the government's new action plan which provides for the implementation of an ambitious energy development program, renewable, and to a lesser extent, for a few energy efficiency pilot programs.

In Morocco, public procurement is governed by public procurement regulations which introduced, in 2013, requirements related to environmental protection as well as the development of renewable energies and energy efficiency. However, it seems that these requirements are not sufficient to boost a public market for sustainable products and services insofar as the volume of public orders, apart from renewable energies, remains limited. This situation is set to change with regard to the recent SNDD which provides for the implementation of an exemplary approach within the public service in terms of promoting sustainable development and this through sustainable public procurement, eco-responsibility for the State and its social and societal responsibility. In addition, the study conducted in 2019 by the Ministry of Energy, Mines and the Environment and UNIDO, as part of the Global Cleantech Innovation Program Morocco (GCIP), revealed that the current procedures of public sector purchases rather favor companies that are already well established, even if their products are less innovative, than green startups.

Tunisia developed, in 2012, as part of the implementation of sustainable development requirements, a national sustainable public procurement action plan (SPPNAP) which resulted in the publication of decree 2014-1039 of March 13, 2014 revising public procurement regulations<sup>12</sup>. This new text has introduced certain provisions in order to encourage and strengthen the sustainability of public procurement purchases. SPPNAP has selected six priority sectors for the implementation of the 2012 SPP system, namely buildings (construction and land management), administrative equipment, IT equipment, furniture, cleaning, food. The new SPPNAP (2019-2023) recommends the implementation of the SPP system, as a first step, in two sectors, notably the building sector and the IT sector before being generalized to the six aforementioned priority sectors. The objectives of the new SPPNAP are to reach an SPP rate of 60% for the 2 priority sectors at the end of 2023 and the SPP rate in all the priority sectors combined should reach 50% in 2025. The new SPPNAP proposes in addition to the introduction into public procurement regulations, of elements likely to facilitate the sustainability of public procurement.

<sup>12</sup> Actualisation du Plan d'Action National des Achats Publics Durables et proposition d'un texte juridique portant réglementation des marchés publics durables. Rapport de synthèse de la Phase 1, page 5. Avril 2019.

### Private consumption:

National private markets for circular / sustainable products and services (organic products, green buildings, ecological tourism, etc.) in the three countries is very weak. Consumers are poorly aware and very poorly informed about the benefits of sustainable products and services and therefore do not express the need and market demand remains low. The ecological or sustainable nature of a product is very rarely used as a selling point. In the sectors of manufacturing industry, construction and demolition, transport; investments in sustainable products and services remain low due to weak markets.

In Algeria, food represents on average 42% of the Algerian household budget, and mainly concerns basic products that are not very processed. The state subsidizes some of these products such as baguette, flour, semolina, milk and to a lesser extent oil and sugar. Their price remains quite low which encourages waste. Apart from food, with the increase in the price of new household equipment, low-income citizens have turned to second-hand products that can be purchased from repairers of such equipment. The acquisition of second-hand IT or communication equipment is also increasing.

In Morocco, the study on the promotion of green entrepreneurship, carried out within the framework of the SwitchMed program, revealed some obstacles to responsible consumption at the national level such as, for example, the conservative habits of the Moroccan consumer who is not ready to adopt new green products and services which are often innovative and sometimes involve new consumption habits. In addition, green products and services are generally more expensive than their conventional competitors. Market demand for circular / sustainable services and products comes rather from an international clientele more aware of, especially for organic products and ecotourism.

In Tunisia, the market for organic agricultural products has experienced remarkable growth in exports, contributing up to 14% in the overall value of agro-food exports in 2018. These exports are dominated by more than 97% by oil, olive and dates<sup>13</sup>. As for the national market, demand for organic products is weak and is just starting to develop. In tourism, although the domestic market demand for alternative tourism, including ecotourism and agritourism, remains low, international demand is growing. Finally, according to studies carried out by the National Institute of Consumption, the rate of growth in consumption has retracted since 2005 due to the national and international economic situation. In times of crisis, Tunisian consumers are more likely to favour second-hand items and repairs to the detriment of buying new in order to control their spending<sup>14</sup>. This type of behaviour can be an asset for the circular economy, which aims to extend the life of equipment.

### Investment climate and financing of green and circular businesses

From a general point of view, Algeria, Morocco and Tunisia are ranked respectively at 157th; 53rd and 78th position worldwide in the World Bank's Ease of Doing Business 2020 ranking. The time required for the administrative procedures to create a business is around 17 days for Algeria, 9 days for Morocco and 8 days for Tunisia according to The Global Competitiveness Report 2019.

<sup>13</sup> Le secteur de l'agriculture biologique en chiffres. <http://www.onagri.tn/uploads/images/filieres/bio/mai2019/Fiche-indicateur-BIO-MAi2019.pdf>

<sup>14</sup> Les changements des modes de consommation en Tunisie, Institut National de la Consommation, 2013, page 79.

In terms of financing, access to financing for new businesses remains quite difficult, Algeria, Morocco and Tunisia are ranked respectively in 81st; 61st and 109th position in SME access to credit according to The Global Competitiveness Report 2019.

There are a multitude of programs, grants, tax and financial benefits to stimulate and support the creation and development of businesses and start-ups, but these devices are not specifically dedicated to green and circular businesses.

The mechanisms and mode of financing are mainly based on the banking sector. The stock market, venture capital and non-bank financing in general, is relatively underdeveloped. Other types of funding such as crowdfunding; the Business Angel; funding and sponsorship networks are starting to emerge. Tunisia promulgated, in August 2020, the law on crowdfunding and Morocco prepared a bill for this mode of financing.

In Algeria, there are support mechanisms for the creation of activity, such as the ANSEJ systems; CNAC; ANGEM which support the creation of new small businesses by offering multiple advantages such as tax exemptions, bank loans with subsidized interest rates, non-refundable financial assistance as well as training and support for project leaders. In addition, there is the ANDI device which is aimed at SMEs in the construction, operation or extension phase and also offers tax and financial advantages such as exemption from taxes and bank loans at subsidized rates. In addition, the agriculture and livestock sector benefits from increased operating and investment credits, tax exemptions as well as subsidies within the framework of support programs for priority sectors. Organic farming also benefits from an additional subsidy.

In Morocco, different financing mechanisms and methods are planned to promote entrepreneurship and the development of SMEs. The state provides grants, financial loans, bank co-financing, bank debt guarantees, interest-free advances and donations through a few management agencies such as Maroc PME and the Caisse Centrale de Garantie (CCG). These funding mechanisms are supplied by the “Green Innov Invest” (GNII) fund specially dedicated to green entrepreneurship; the “Innov Invest Fund” (FII); the “Industrial Development and Investment Fund” (FDII); “Hassan II Fund for Economic and Social Development” and, recently created, the “Support Fund for the Financing of Entrepreneurship”. There is also a line of sustainable energy financing called “MorSEFF”, supported by the EU and developed by the EBRD, intended for Moroccan private companies, and the “OCP Innovation Fund For Agriculture” which is a fund of investment dedicated to promoting innovation and entrepreneurship in the agriculture and agro-industry sectors.

Tunisia has made it easier to start a business by merging several services into a single window and reducing fees<sup>15</sup>. In order to promote entrepreneurship and the development of SMEs, the state provides for bonuses, financial and tax incentives, and equity investments. These benefits are financed by the Tunisian investment fund and managed by the Agency for the Promotion of Industry and Innovation (API). Business financing is provided mainly by the banking sector,

<sup>15</sup> Doing Business 2020. Comparing Business Regulation in 190 Economies. The World Bank. Page 124.

which has a large number of establishments, public and private, of various kinds, including resident and non-resident banks and financial establishments (leasing establishments; factoring companies, banks of ‘business). The credits granted are guaranteed by the Tunisian Guarantee Company (SOTUGAR)<sup>16</sup>. Several funds intervene to help promoters who seek to finance their projects, in particular, the National Fund for the Promotion of Handicrafts and Small Trades (FONAPRAM), the Industrial Promotion and Decentralization Fund (FOPRODI), the Special Development Fund Agriculture and Fisheries (FOSDAP).

### **Specific programs and platforms (incubators / accelerators)**

In terms of incubation for green entrepreneurship, apart from pilot programs, particularly those provided within the framework of international cooperation, there are no permanent programs to promote the green and circular economy.

In Algeria, incubation is provided by the SME development and innovation promotion agency (ADPIPME) which, with its support and advisory centres and business incubators, has the mission of “ encourage the emergence, growth and sustainability of SMEs by offering support services for project leaders, incubation and hosting of SMEs in the creation phase and supporting innovation. In addition, systems such as ANSEJ, CNAC, ANGEM provide training and support activities for project leaders. There are also private incubators and coworking spaces offering similar support services as well as associations.

In Morocco, alongside the public agency “Maroc PME” which is the main support structure for project leaders offering subsidies for green and circular companies, in particular for training, support, technical assistance or investment, there are a large number of public and private support organizations aimed at micro-enterprises, cooperatives, startups, developing companies, auto-entrepreneurs, etc.). These organizations rely on national and international funding within the framework of cooperation programs. Among the programs specific to green entrepreneurship, there is the “CleanTech” program, initiated in 2016, a program carried out jointly by the Delegate Ministry in charge of the Environment, UNIDO and other national partners, and the Ecostart program, initiated in 2020, and supported by GIZ, Agence Maroc PME and Agence AMEE and within the framework of the PACC Morocco-European Union cooperation programme.

In Tunisia, the Agency for the Promotion of Industry and Innovation (API) has created a one-stop shop to facilitate the completion of administrative and legal formalities<sup>17</sup>. The API has a Business Creation Support Center (CSCE) which manages the National Network of Business Incubators (RNPE), made up of 28 business incubators, offering training, support, technical assistance, business accommodation and financial aid for project leaders. Similar services are also offered by the Agricultural Investment Promotion Agency (APIA)<sup>18</sup> to promote agriculture as well as organic farming. There are also a multitude of support organizations, public and private, as well as support programs<sup>19</sup> aimed at project leaders, micro-enterprises, start-ups, developing companies in the fields of ICT, industry, etc. service, agriculture, social entrepreneurship, innovation, crafts ... These organizations and programs are supported by national and international funding, particularly within the framework of cooperation

<sup>17</sup> <http://www.tunisieindustrie.nat.tn/fr/home.asp>

<sup>18</sup> <http://www.apia.com.tn/presentation.html>

<sup>19</sup> <https://www.mawalni.tn/>

programs (UNIDO, GIZ, Switchmed, etc.). For examples, support programs such as the “Souk At-tanmia” program which provides specific assistance for ecological projects<sup>20</sup>, the “RAIDA” female entrepreneurship promotion program<sup>21</sup>, and the entrepreneurship program, the green entrepreneurship program of the SwitchMed initiative executed by the International Center for Environmental Technologies of Tunis (CITET)<sup>22</sup>.

<sup>20</sup> <http://www.soukattanmia.org/>

<sup>21</sup> <http://www.femmes.gov.tn/programmes-et-projets/>

<sup>22</sup> <http://www.citet.nat.tn/Portail/economie-verte.aspx>

### **Availability of human resources (skilled labour)**

Unemployment rates in the three Maghreb countries are relatively high (11.2% in Algeria, 10.2% in Morocco and 14.9% in Tunisia), unemployment among young people aged 15 to 24 is even higher (29.9% in Algeria, 28% in Morocco and 33.8% in Tunisia). The unemployment rate for graduates is 28.5% in Algeria; 17.4% in Morocco and 27.8% in Tunisia. These statistics show a high availability of local labour which is not yet integrated into the economy and can create wealth if it is adequately stimulated. However, economic reports (especially those of the World Bank) indicate a lack of qualification of the workforce in relation to the demand of the labour market. By extrapolation, and in the absence of a specific study, we can assume that there is also a lack of skills in the workforce to ensure the development of a circular economy in these three countries. Surveys of business leaders show that it is more difficult to find qualified employees in these three countries compared to developed countries. Likewise, these executives estimate that university graduates have average skills needed by businesses according to The Global Competitiveness Report 2019.

### **Innovation, R&D**

Innovation rates (percentage of people involved in recent entrepreneurial activities who indicate that their product or service is new to at least some customers and that few / no companies offer the same product), which measure the degree to which projects entrepreneurs are innovative, are 11.48% for Algeria, 14.88% for Morocco and 32.17% for Tunisia (world average of 26.26% in 2018). This shows that Algerians and Moroccans are more conservative and opt for more traditional business models with less risk of failure, compared to Tunisians or the world average.

Furthermore, in terms of innovation capacity, Algeria, Morocco and Tunisia are ranked 86th; 81st and 92nd out of 141 economies in the world. Research and development spending is low and ranges from 0.5 to 0.7% of GDP (The Global Competitiveness Report 2019).

Infrastructure rating and ranking (the global competitiveness report 2019)

	Algeria		Morocco		Tunisia	
	Rank	Rate	Rank	Rate	Rank	Rate
Transport	94	43,4	41	60,0	101	41,8
Utility (electricity and water)	73	84,2	70	85,3	74	83,7
ICT adoption	76	52,7	97	46,2	83	50,9
Total infrastructure	82/141	63,8/100	53/141	72,6/100	85/141	62,7/100

**Available technologies and infrastructure**

From the ratings and rankings above, it appears that the transport infrastructure is much better developed in Morocco and ICTs are more present in Algeria.

However, there is a disparity in the availability of infrastructure and technology between large cities and small towns and isolated villages. The former are much better equipped than the latter.



**Entrepreneurial mindset**

The entrepreneurial mentality can be profiled on the basis of self-employment statistics in the different countries as well as on the basis of indicators developed within the framework of the “Global Entrepreneurship Monitor” (GEM), by “GEM Consortium”, and whose various investigations led to the results below:

Items	Algeria (2013)	Morocco (2018/19)	Tunisia (2015)	Global average (2018/19)
Perceived Opportunities Rate: Percentage of population who see good opportunities to start a firm in the area where they live	61,86	57,66	48,79	53,65
Fear of Failure Rate: Percentage of population who indicate that fear of failure would prevent them from setting up a business	32.95	42.52	40.25	41.74
Entrepreneurial Intentions Rate: Percentage of population who are latent entrepreneurs and who intend to start a business within three years	36.02	41.93	28.80	23.72
Total early-stage Entrepreneurial Activity (TEA): Percentage of population who are either a nascent entrepreneur or owner-manager of a new business	4.89	11.40	10.13	12.81
Motivational Index: Percentage are improvement-driven opportunity of those involved in TEA that motivated, divided by the percentage of TEA that is necessity-motivated	2.92	1.32	3.56	2.72
High Status to Successful Entrepreneurs Rate: Percentage of population who agree with the statement that in their country, successful entrepreneurs receive high status	84.23	68.37	72.10	72.92
Entrepreneurship as a Good Career Choice Rate: Percentage of population who agree with the statement that in their country, most people consider starting a business as a desirable career choice	79.59	81.42	71.10	65.66

In Algeria, although wage employment is the dominant form of employment and affects 69.8% of the employed population, the culture of entrepreneurship is quite present, with 3 out of 10 employed creating their own jobs. According to the GEM survey, business creation is driven far more by opportunities for improvement than by necessity. Almost 62% of the working age population think there are good opportunities to start a business in their regions, but only almost 36% intend to start a business within the next 3 years yet fear of failure is lower compared to countries in the region. Entrepreneurship enjoys strong social consideration and represents a good career choice.

In Morocco, the examination of employment statistics prepared by the HCP in 2019 shows that the self-employment rate is 40.8% compared to the employed working population, this rate is 55.7% in rural areas and 32.8% in urban areas. These rates reveal that the culture of entrepreneurship is quite present in the economic landscape of Morocco and that it is more pronounced in rural areas than in urban areas. This trend can be explained by the fact that in rural areas there is less opportunity for employment as an employee than in urban areas. Moreover, according to the GEM survey, business creation is motivated more by opportunities for improvement than by necessity. Almost 58% of the working age population think there are good opportunities to start a business in their regions, and almost 42% intend to start a business within the next 3 years yet fear of failure is more important compared to countries in the region. Entrepreneurship enjoys good social consideration and represents a very good career choice.

In Tunisia, the examination of employment statistics established during the last RGPH<sup>23</sup> shows that the rate of self-employment (self-employed and employers) is 18.9% compared to the employed active population, this proportion is same order in both urban (18.8%) and rural (19.3%) areas. These rates reveal that the culture of entrepreneurship is not very present in the economic landscape of Tunisia and that the trend towards salaried work is much more marked with a rate of 78.0% compared to the employed working population. However, more than 71% of Tunisians consider the creation of a company as a desirable career choice according to the GEM survey conducted in 2015. Moreover, the examination of the results of the aforementioned GEM survey shows that nearly 49% of Tunisians believe that there are good opportunities to start a new business in their regions, but over 40% are afraid of failure. Almost 29% of Tunisians are latent entrepreneurs who intend to start a business in the near future (3 years). In addition, according to this same survey, with regard to the motivation index, the creation of a business is much more motivated by opportunities for improvement (improvement of income, independence) than by necessity, conditioned by the environment. social and economic situation (high unemployment rate, job instability, low level of remuneration and social exclusion).

### **Knowledge and awareness of sustainability and the circular economy**

Consumers in region I are very poorly informed about the benefits of circular economy products and services and the impact of their consumption on the environment and resources.

The Algerian consumer has a negative perception of recycled products, because they are supposed to be contaminated or of poor quality, as well as products already in use (such as textiles, household equipment, furniture).

<sup>23</sup> Recensement Général de la Population et de l'Habitat 2014. Institut National de la Statistique. 12/2017. Pages 27; 81; 82.

Moroccan consumers, reputed to be conservative in their choices, are not ready to quickly adopt new green and innovative products and services which sometimes involve changing consumer behaviour, which has the effect of delaying the emergence of the market of sustainable products and services.

In Tunisia, the concept of green entrepreneurship is not common to the majority of the population and also poorly understood by Tunisian entrepreneurs. Some economic actors believe that the green and social economy is not considered a priority by the public authorities. There is therefore a significant cultural challenge for the development of green entrepreneurship<sup>24</sup>.

<sup>24</sup> La promotion de l'entrepreneuriat vert et de l'éco-innovation sociale en Tunisie. SCP/RAC, programme SwitchMed, 2017. Page 17

### Vocational training and education

In Algeria, there are diploma and qualification training courses, both in public and private establishments, which can meet the needs of the circular economy, especially in the field of renewable energies; energy efficiency; waste management; water and sanitation; environment and sustainable development.

In Morocco, public and private training institutions offer bachelor's and master's level training in various fields related to the circular economy, in particular sectors such as the development of natural resources, environmental protection, energy, water and sustainable development, sanitation management, sustainable exploitation and enhancement of the marine environment, etc.<sup>25</sup> and also training in eco-design engineer, wind turbine construction engineer etc.<sup>26</sup>.

<sup>25</sup> <https://www.etudesamaroc.com/formation-universitaire-p1-23.html>

<sup>26</sup> <https://www.guide-metiers.ma/>

In Tunisia, in terms of qualification in the field of the green economy, the Tunisian training system includes a vocational and university training system providing initial training and continuing training and relying on public and private training organizations. These systems offer little initial training and diploma specifically dedicated to the green economy, but the training courses include, in many specialties, training modules related to the green economy. On the other hand, the continuing education organizations have a diversified offer related to the protection of the environment and the saving of resources (water and wastewater, waste, energy efficiency, renewable energy, organic farming, etc.)<sup>27</sup>.

<sup>27</sup> Etude sur les compétences pour les emplois verts en Tunisie. Programme MDGF YEM, 2011. Page 41.

### Clientelism, corruption

According to the 2019 Corruption Perceptions Index established by Transparency International<sup>28</sup>, Algeria, Morocco and Tunisia are respectively ranked at 106; 80 and 74 global positions out of 180 countries with public sector corruption perception scores of 35; 41 and 43 respectively (a score of 100 means that the country is very little corrupt). This means that corruption is quite present in the 3 countries. In Algeria, since 2019, many political leaders and senior officials have been prosecuted for corruption. The 3 countries are constantly improving their legal and institutional anti-corruption mechanisms.

<sup>28</sup> [https://transparency-france.org/wp-content/uploads/2020/01/2019\\_CPI\\_Report\\_FR.pdf](https://transparency-france.org/wp-content/uploads/2020/01/2019_CPI_Report_FR.pdf)

### Gender equality

In Algeria, male entrepreneurship represents 30.9% of the employed male population while female entrepreneurship represents only 19.0% of the employed female population. This finding is explained by the preference of women for stable paid employment, mainly in the public sector (64.1% of total female employment).

In Morocco, and according to data from the HCP, the female activity rate was 22.1% in 2019. This low economic participation of women is explained by several factors, in particular, the weight of the social roles associated to women. In fact, according to HCP surveys, almost half of inactive women are inactive because of the need to take care of their homes and children.

In Tunisia, according to data from the RGPH, the rate of self-employment among women is 18.8% compared to the employed active female population, this proportion is slightly higher in urban areas (19.1%) than ‘in rural areas (17.6%) but remains comparable, as a whole, to that of men.

In addition, in terms of gender, the aforementioned GEM surveys led to the results below:

Items	Algeria (2013)	Morocco (2018/19)	Tunisia (2015)	Global average (2018/19)
Female/Male TEA Ratio: Percentage of female population who are either a nascent entrepreneur or owner-manager of a ‘new business’, divided by the equivalent percentage for their male counterparts	0,51	0,51	0,36	0,71
Female/Male Opportunity-Driven TEA Ratio: Percentage of those females involved in TEA who (i) claim to be driven by opportunity as opposed to finding no other option for work; and (ii) who indicate the main driver for being involved in this opportunity is being independent or increasing their income, rather than just maintaining their income, divided by the equivalent percentage for their male counterparts	1,08	1,09	0,93	0,94

These results show that female entrepreneurship is much less dynamic than that of men (ratio around 0.5). In addition, there are similarities between the motivations of women to start a business with that of men (ratio around 1). This means that, in general, women are motivated by the opportunity for improvement rather than finding no other work option (necessity); and that the main factor in participating in this opportunity is to be self-employed or increase their income, rather than just maintain their income.

Commonalities that apply throughout the region:

## Strengths

- The 3 countries of the region have signed or acceded to the majority of international treaties, conventions, protocols relating to environmental protection and sustainable development. They are therefore in the process of transposing their international commitments to the national (regional) level.
- The 3 countries of the region have developed a legal and institutional framework favorable to the protection of the environment and sustainable development
- The 3 countries have developed strategies, plans and programs that integrate the basic foundations of the circular economy (National sustainable development strategies, waste reduction and recovery strategy, national action plans on MCPDs, development program of RE and EE)
- Institutions specifically dedicated to the protection of the environment and natural resources, renewable energies and the promotion of SMEs
- Financial and fiscal incentives for the creation and development of SMEs
- Grants for the establishment of standardized environmental and energy management systems ISO 14001 and ISO 5001
- Natural capital favorable to the development of solar energy
- A natural capital and a cultural heritage favorable to the development of alternative tourism, in particular eco-tourism
- International cooperation programs promoting the transfer of knowledge and know-how in the fields of water, energy, waste management, the economy of natural resources and environmental protection, entrepreneurship and green economy.
- The development of public-private partnerships in several areas including water, energy, transport, etc.
- An offer of initial and continuing training, public and private, leading to diplomas and qualifications, varied in the fields of water, energy (RE and EE), the environment, sustainable development, waste management, etc.
- A satisfactory level of business infrastructure

## Weaknesses

- A lack of synergy, between the different institutions, programs and legislative instruments, etc., which slows down the emergence of the green economy and eco-entrepreneurship
- Access to financing remains difficult, despite the different financing methods and mechanisms put in place and the various support funds established in the 3 countries.
- The non-banking sector, formed by the stock market, venture capital and non-banking financing in general, is relatively underdeveloped.
- Other types of financing such as crowdfunding and Business Angel are also not very developed.
- National markets for sustainable products and services, particularly in the sectors of agriculture, tourism, construction, transport, products from manufacturing industries (textiles, furniture, etc.), etc., remain weak.
- Lack of consumer awareness of the economic and ecological benefits of sustainable products and services
- Lack of quality labels for circular / sustainable products and services as well as a lack of visibility of already existing labels.
- Low sensitivity of the economic sector to MPCD
- Lack of rigorous checks on compliance with existing laws and regulations relating to the environment, water and energy and waste management, etc. for lack of human and material resources.
- A lack in the legal framework relating to EPR which slows down the organization of waste disposal channels (although Tunisia has already organized 4 channels).
- Low capacity for innovation and very limited public expenditure in research and development, not exceeding 0.7% of GDP.
- Entrepreneurs lack information on the potential and opportunities of green sectors.
- Cumbersome and complex administrative procedures for obtaining approvals and authorizations, especially those concerning establishments classified for environmental protection.

(transport, utilities, ICT) in large cities

- A booming organic farming sector with a development of the legal framework allowing the certification and control of organic products.

- Bureaucracy and corruption at all levels, as well as the lack of transparency in public procurement, hamper the development of a healthy business environment and discourage entrepreneurship.
- Lack of an economic information system to help companies develop their business model. The information available on the economic, social and environmental impacts of conventional production methods is not sufficiently relevant to determine the benefits of switching to sustainable consumption and production methods.
- The informal sector, waste recycling for example, constitutes a form of unfair competition which can discourage entrepreneurs who formalize the creation of their businesses.
- A poorly developed entrepreneurial culture, lack of initiative, creativity, project maturity and a preference for salaried work.
- The economic, social and institutional situation does not provide sufficient insurance against the risks of failure and the entrepreneur must offer personal guarantees to access financing or in the event of liquidation, which increases risk taking and slows down private initiatives
- A lack of information and communication that hinders business creation initiatives. project promoters are often little or not at all informed about the support structures and financing mechanisms available when preparing their projects.
- Lack of coordination, dialogue and cooperation between the different actors of the green entrepreneurship ecosystem: administration, entrepreneurs, financial institutions, civil society organizations, support structures and other actors often work independently or even isolated which reduces their effectiveness.
- Mismatch between what organizations offer entrepreneurship support services and what green entrepreneurs really need.
- Green entrepreneurship support programs are often initiated on a pilot basis and therefore limited in space and ad hoc in time and do not offer continuity and long-term prospects.
- Lack of communication around public programs related to green entrepreneurship as well as a lack of information and communication on the offers of support structures.
- Lack of qualified workers in the field of CE and

- the qualification of graduates does not correspond to the needs of the market.
- Sustainable public procurement is practically non-existent except for those relating to renewable energies.
- Low recovery rate (recycling, composting, incineration) of waste.
- Lack of monitoring and control of the implementation of MCPD strategies and action plan
- No carbon tax
- Very little integration of CE principles in the industrial field, including eco-design, sustainable procurement, industrial symbiosis and the economy of functionality

## Opportunities

- New types of financing such as crowdfunding and Business Angel are starting to emerge in the region, particularly in Tunisia where the law on crowdfunding was promulgated in August 2020.
- The sectors of the green and circular economy, innovative and little known, often present the opportunity to create markets and benefit from a low level of competition to develop the activity.
- A regulatory mechanism in favor of the development of micro-enterprises insofar as 20% of the public order for works, supplies, studies or services will be reserved for them.
- Poorly developed rural areas and isolated areas in the 3 countries can become an opportunity to develop circular economy sectors highlighting local resources that are little or not exploited with significant economic benefits.
- Availability of significant human capital, in particular a pool of young graduates who are not yet integrated into the economy, who can benefit from international programs and competitions intended for green entrepreneurs and thus increase their capacity for action in the circular economy.
- A young population in search of employment opportunities
- An increasingly important involvement of civil society and a growing environmental awareness thanks to access to information, in particular, through social networks such as Facebook.
- A large number of entrepreneurial support structures such as incubators, accelerators, business incubators, networks, associations, coworking spaces, public and

## Threats

- National or international economic crisis leading to instability in supply chains
- Shortage of resources in the region and in the world and rising prices of raw materials
- Water scarcity, the countries of the region have an availability of water resources of less than 1000 m<sup>3</sup> / year / capita
- Accentuation of current consumption patterns leading to degradation of the environment, coastline and marine environment and negative impacts on the quality of life of citizens
- Loss of agricultural land through erosion, salinization, and urban sprawl
- Marginalization of circular economy strategies against other national priorities
- Aggravation of the tendency to overconsumption and waste
- Negative impacts of the parallel economy and weakening of waste recovery channels by the informal sector
- Significant increase in the production of waste and its accumulation

private, have developed and strengthened in recent years and can be used to support the promoters of green projects

- Strong awareness of the need to further diversify the economy (diversification of the tourist offer favorable to the development of ecotourism and agritourism in Tunisia and Morocco, diversification of all sectors apart from hydrocarbons in Algeria) which can benefit the circular economy.
- The proximity of European markets, which are more sensitive to sustainable products, can be beneficial to green companies in the Maghreb region if these companies manage to position themselves in relation to the demand of these markets.
- The low rate of waste recycling shows significant potential for saving resources and investment opportunities in this sector.
- The 3 countries have not yet achieved food self-sufficiency for basic products such as wheat, oilseeds and sugar, the circular economy can be an opportunity to reduce the consumption of these resources by limiting waste and losses throughout the supply chains.
- Taxes on plastics promote eco-design and recycling of this material
- A market potential for reuse, repair (reconditioning) and reuse that can be easily developed to meet consumer needs.
- Saving resources is now a little more important with budget deficits in the 3 countries which must identify opportunities for rationalizing spending, in particular through the rationalization of the use of raw materials which are often imported.



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