



THINK • STIMULATE • BRIDGE

ANNUAL REPORT

2017



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EDITORIAL

Since its creation in 2014, OCP Policy Center has striven to contribute to collective reflection on the challenges for Morocco, the African continent, and more generally, the global South. Its ambition, as any think tank, is to share its analyses, research, evaluations and findings with policymakers, executives, academia and civil society.

This 2017 report offers a glimpse into the seminars, conferences and other events hosted, independently or in partnership, with other renowned think tanks and research institutes, on topical issues relevant to the global agenda.

The year 2017 has seen over a hundred new publications from our think tank on a great diversity of topics, such as the Moroccan job market, international and regional security, tapping and sustainably of managing water resources, the challenges of promoting the aerospace industry in global value chains, jobs and globalization, Chinese investments in Africa, natural resources and geopolitical realities in the African continent, development and recent US foreign and domestic policy.

The chapters in this annual report cover long-term development, commodity economics and finance, agriculture as a key to food security and environmental preservation, and regional and international geopolitics.

Public policy in Morocco remains at the heart of OCP Policy Center's work. The think tank addressed a diversity of issues ranging from the challenges of growth and employment, to social cohesion, sustainable development or the country's global position. Youth and gender issues are also a particular area of focus.

Africa holds a special place in this report, given the new dynamics generated by Morocco's return to the African Union as the country joins the pan-African organization's decision-making bodies, and densifies its bilateral relations with the great majority of African countries in all regions.

The report discusses Africa as a continent, with analyses of resolutions of continued conflicts in many areas of the continent, combating terrorism, empowering the African Union in its actions for peace and security and socio-economic development. In 2017, our work on strategy focused on the complexities of the Middle East and its Arab-Persian prolongation, evaluating Brazilian and Moroccan policy on Sub-Saharan Africa, the potential held by trilateral Morocco-China-Africa relations and power games between China and the USA.

The 6th edition of "Atlantic Dialogues," OCP Policy Center's flagship event, was held in Marrakesh in December 2017, under the High Patronage of His Majesty King Mohammed VI. It brought together over 400 guests, including several former heads of state and government, prominent diplomats, leaders of international institutions, senior executives of major companies, representatives of international and regional organizations, researchers, and international media executives. The theme of this year's edition was "Africa in the Atlantic: Time for Action."

Emerging Leaders, a group of 50 professionals aged 23-35, took part in the conference's debates, sharing their visions and expectations on various themes over two days.

Rather than providing a comprehensive summary of OCP Policy Center's activities in 2017, the present report aims to display our think tank's areas of interest and action, and how it helps create a platform to exchange and share information. These interests, and our focus on sharing, are a source of inspiration, pushing us forward and constantly encouraging us to question ourselves.

The University of Pennsylvania's annual global think tank ranking (OCP Policy Center was ranked 9th best Think Tank in the MENA region, 15th globally for the quality of its flagship conference, and 48th best energy and resource policy Think Tank) brings recognition to our entire team and confirms that our young center has successfully established itself nationally, regionally and intercontinentally.

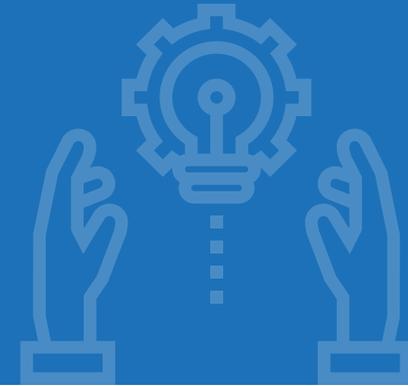
Such recognition brings us much satisfaction and encourages us to step up our efforts to promote a culture of dialogue, sharing and emulation. We are grateful to all those who have contributed to it.

Karim El Aynaoui
Managing Director

OCP POLICY CENTER IN A FEW WORDS

Our Ambition

Contribute to insights and analysis on socio-economic policy in Morocco, Africa, and the global South.



Our Approach

Observe, elucidate, analyze and evaluate public policies.



Our Mission

Contribute to developing skills as well as promoting dialogue and international cooperation.



Our Research Areas



Long-term Development

In this part of our research, we analyze long-term issues such as structural transformation and competitiveness or macro-economic policy, in Morocco or at the regional or continental level. We also evaluate public policies in general.



Geopolitics and International Relations

We work on key international geopolitical challenges such as defense, security and power dynamics, with a particular focus on Africa. We also look into Morocco's position in its geostrategic environment.



Commodity Economics and Finance

This program focuses on global commodity markets, analyzing centers of production, consumption, and relationships between actors and stakeholders. It combines short-term analyses linked to the economic context with long-term trends and underlying dynamics.



Agriculture, Environment and Food Security

This research program has a global approach to priorities in the agricultural sector, climate change, environmental preservation and the impact of population growth.



THINK

Our publications

In 2017, the total number of our publications reached **112**, broken down as follows:

45 Policy Briefs

Presenting their authors' analysis and perspective on topical national, regional or international issues.

31 Blog Articles

Written by authors who wish to share their opinion on important subjects and to spark off comments and debate.

12 Books & Reports

Individually or collectively, authors provide their analyses in books or reports on strategic issues.

18 Policy Notes & Papers

Addressing complex issues through empirical analysis. Authors present their findings and make public policy recommendations.

4 Research Papers

These are technical and/or academic papers which usually provide an analysis or a synthesis of international strategic, political or socio-economic issues.

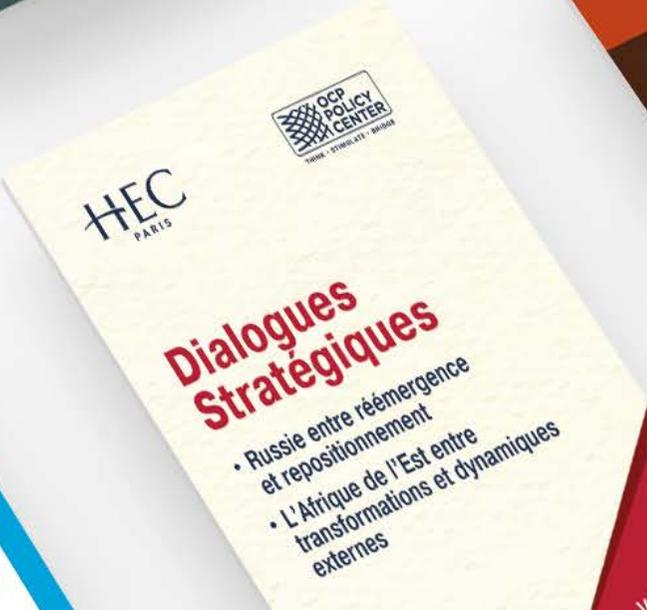
1 International Jobs Report

Focusing on global trends in the 2017 job market, to help understand the impact of economic growth on job markets in advanced, emerging and developing economies.

1 Special Issue in an Academic Journal

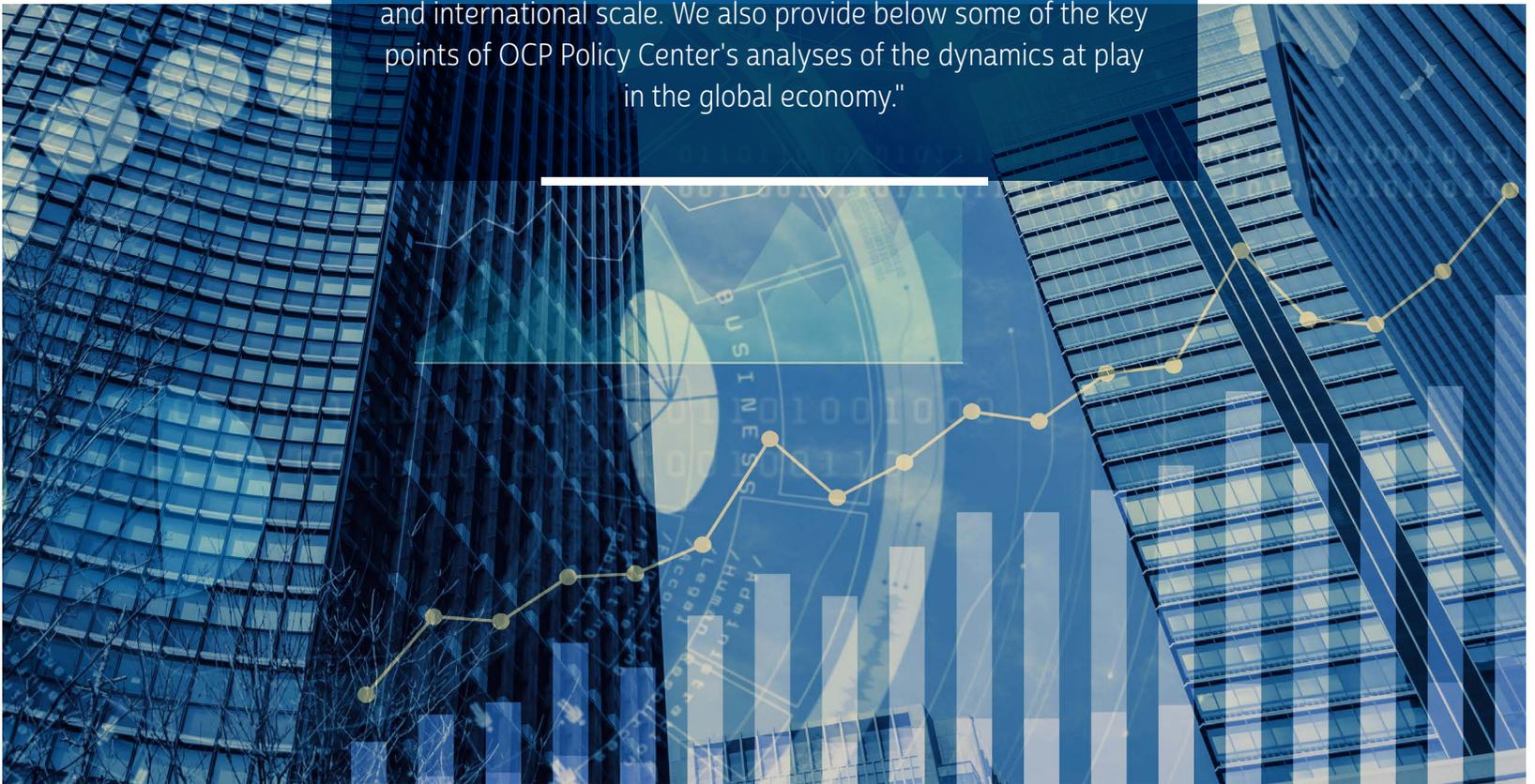
This is an article published in a specialized scientific journal. As a scholarly journal, it is indexed and peer-reviewed by credible academics. Peers are specialized in the same area as the paper, and review the scientific method used by the authors.





LONG-TERM DEVELOPMENT

"OCP Policy Center's goals in 2017 include identifying drivers of growth and promoting strategies to stimulate Morocco's long-term development on the national, regional and international scale. We also provide below some of the key points of OCP Policy Center's analyses of the dynamics at play in the global economy."





In today's world, the usual proponents of liberalism and economic openness have turned their backs on these values and have criticized globalization and its impact on the prosperity of nations. This paradigm came with the new US administration that pushes to change international trade frameworks which, from its perspective, have harmed US economic interests. American economic borders are closing down and risks of retaliation are increasing. Yet, international organizations have repeatedly warned against the harmful consequences of a rush to protectionism on the global economy. Thankfully, global economic activity has never been so strong in the decade following the 2008 crisis, owing to expansionary monetary policies, but also to structural factors in each economy. Job market indicators are positive and continue to improve, despite divergences between stabilizing developing economies and emerging countries that continue to have some difficulties.

In addition to these factual, context-induced matters, OCP Policy Center continues to reflect on long-term issues. Structural transformation is strategically vital in its analyses,

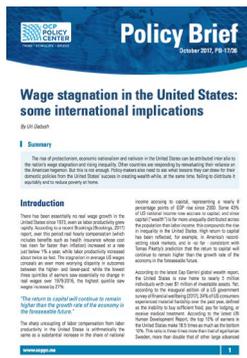
and manufacturing, especially, should play an important role. Africa aspires to more resilient economic expansion given the volatility of commodity prices, and is also of great significance in the think tank's analyses, particularly on long-term development. Successful industrialization, a sign of the continent's economic development, depends on public authorities' ability to mobilize financial resources to overcome the structural deficit in basic infrastructure. In addition to industrialization and infrastructure, there is another key to successful economic transformation: economic integration. If Africa is not sufficiently integrated, it will continue to play a secondary role, thwarting its economic take off.

The transatlantic area continues to be an essential part of the spirit of debate promoted by OCP Policy Center, through "Atlantic Dialogues", its flagship event. The "Atlantic Currents" report shares participants' insights and, each year, helps to grasp underlying dynamics to better rebuild this space. The 2017 edition focused on the continent's performance in terms of economic development, social security and governance.

Broadly speaking, deeper understanding of the Atlantic or regional space does not come at the expense of understanding the context and mechanisms at play in national development. The Moroccan economy's challenges remain at the heart of OCP Policy Center's work, such as the country's international position, social cohesion, sustainable development, or gender equality. These issues have been extensively analyzed in research papers and publications that enriched Morocco's scientific offer.

The World

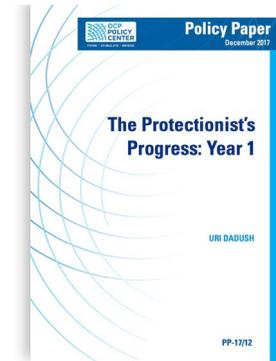
Once again, in 2017, globalization was a subject of special focus, given the upheavals induced by US trade policy. The new administration has significantly changed America's official narrative on the consensual and unifying values of advanced economies, particularly regarding openness and liberalism. The nation that established the "Washington Consensus" has broken away from its own history of pioneering these values. Our network of researchers conducted several studies to understand the causes and consequences of such an upheaval.



The election of Donald Trump, whose economic policy is steeped in nationalist doctrine, was a surprise to many. But its consequences were predictable, as Uri Dadush explains in his Policy Brief titled "[Wage Stagnation in the United States: some International Implications](#)". According to the author, America's wages have stagnated over two generations, despite continuous economic growth. Worse, wages, as compared to the cost of living, have not increased for unskilled workers. Entrepreneurs are reaping an increasing share of wealth creation. As a result, the middle class is eroded, inequalities increase and a sense of injustice spreads, contends the analyst. America's trade openness, illustrated by its large trade deficit, was called into question.

In another article, a Policy Paper entitled "[The Protectionist's Progress: Year 1](#)", Uri Dadush discusses the founding principles of nationalist doctrine. These draw from mercantilist rhetoric and are based on disengagement from multilateral agreements in favor of a bilateral negotiation model which the US, as a global economic power, could better benefit from. The USA's unpredictability allows it to obtain more trade concessions, especially with the Big Four (China, Germany, Japan and Mexico). President Trump's economic agenda was quickly enacted with the withdrawal from the Trans-Pacific Partnership Agreement; Trump also called to substantially revise the North American Free Trade Agreement (NAFTA), described on the US side as the "single worst trade deal ever approved" by the country's president.

In his analysis in his Policy Brief "[NAFTA in Play: How President Trump Could Reshape Trade in North America](#)", Uri Dadush affirms that this agreement has no chance of surviving. Under the proposed tax reform in the US, importing businesses would be penalized and exporting businesses would be exempted through Border Adjustment Taxes. According to the analyst, this measure violates key principles of the World Trade Organization (WTO).



The author contends that the new administration's vision is partial, and more importantly, inadequate in solving America's economic problems. Firstly, the trade deficit is less alarming than in the past. It does not exceed 3% of GDP, and remains sustainable from a macro-economic standpoint. Half of US imports are raw materials and intermediate goods. Moreover, external imbalances do not necessarily reflect careless policymaking, but rather internal imbalances which, in this particular case, are linked to low public and private saving. The main cause of job loss and declining living standards, at least for unskilled workers, is international job distribution. Why? In global value chains, the US offer high value-added activities and position themselves as the global center of gravity for innovation and R&D. Technological developments from the US have ultimately led to unskilled jobs to be destroyed and/or outsourced to countries with cheap labor.



These arguments, which Uri Dadush presents in his Policy Brief "Will America Trigger a Global Trade War?", and that are accepted by a large share of the community of economists, are refuted by the US administration. The author is skeptical about the future of global trade, as there is a real possibility that advanced economies implement protectionist measures, in response to general US trade policy. Retaliation could deter the US from breaking from its liberal traditions. This would add to internal pressures from the lobbies of exporting sectors, concerned about the erosion of their competitiveness and international presence if retaliation were to occur. Congress itself, even with

a Republican majority, does not seem to fervently support the administration's nationalist policies.

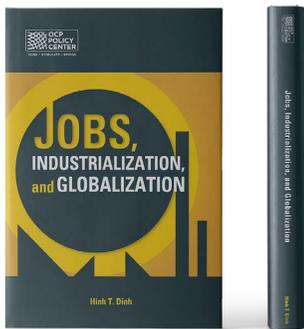
According to Uri Dadush, the shift to a more protectionist world will necessarily call into question the WTO. Here, the author agrees with the Trump administration regarding non-tariff barriers standing in the way of American exporters, in particular in the case of China, and on the issue of Germany which refuses to take economic stimulus measures in order to support domestic demand. In a blog named "Trade Backlash and the World Trade Organization", Uri Dadush calls on the WTO to bring together all stakeholders and to shift towards a plurilateral model of negotiation. The aim is to address non-tariff barriers. Other economic powers should also get involved and support the WTO, while encouraging the US not to leave the ship. He encourages Washington to rethink its tax policy, in particular regarding redistribution, which current policies fail to achieve. Lastly, the author discusses the significant corporate tax cuts, a policy which could deepen the social divide between capital and labor in America.



Otaviano Canuto contributes to the debate on advanced economies' growing reticence to globalization. In a Policy Brief called "Overlapping Globalizations", the author explains the slowing fragmentation of global value chains. This phenomenon partly explains the changes since the 1990's and 2000's, when world trade grew twice as fast as GDP.

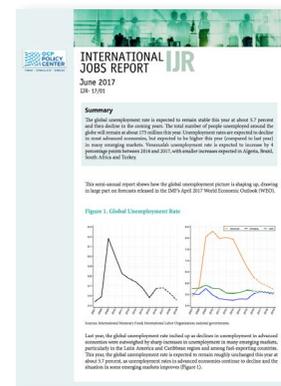
The manufacturing sector has undergone profound shifts related to the rise of service economies and lower job creation in industry. China is a typical case of an emerging economy which took a new trajectory: services and private consumption became drivers of growth, whereas the manufacturing sector is exported and outsourced abroad. This analysis reaffirms Uri Dadush's less pessimistic points in "The Future of Globalization," where Dadush argues that it will be extremely difficult to slow down globalization, which is bound to spread and persist. Thus, the private sector and policy-makers should be vigilant and support all initiatives in favor of freer, but also fairer international trade.

Hinh Dinh devoted his book "Jobs, Industrialization, and Globalization", to the role played by globalization in the metamorphoses in the manufacturing sector. He stays away from controversial trade policies. From his perspective, technological progress should not jeopardize manufacturing in the process of development. Manufacturing is, and must



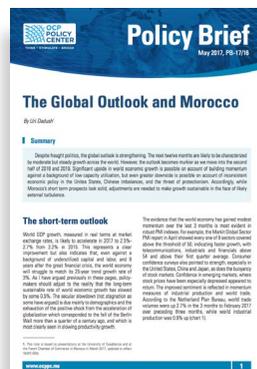
remain, the only bridge between agrarian activities and highly productive services. The proliferation of a middle class, a sign of a democratic and prosperous society, depends on an economy's ability to develop its industries and to continuously reallocate labor from low-productivity activities to high-productivity ones. Over the past three decades, only a few countries were able to become high-income countries or are about to do so. Most countries fall into the "middle-income trap", with a manufacturing sector that shrinks instead of expanding. Deindustrialization at such an early phase of development is the major challenge to overcome for middle-income as well as low-income economies, which must even more urgently invest in infrastructure. Otaviano Canuto and Aleksandra Liaplina explain the crucial role of investment in infrastructure. According to them, the paradox resides in international markets' abundance of capital looking for high return, in a context where interest rates are exceptionally low. In their Policy Brief entitled "Matchmaking Finance and Infrastructure", Canuto & Liaplina recommend stronger involvement by private investors and well-designed financing models.

Key global trends in growth and employment have also



drawn the attention of OCP Policy Center's experts, who have explored short and medium term prospects for the global economy. In the "International Jobs Report" Prakash Loungani discussed key market indicators in 2017 and their 2018 outlook. According to him, unemployment should decline in 2018, falling

below the 5.7% level of 2017. Different countries will have different trajectories however, with advanced countries stabilizing in the long-term, while emerging economies face high and persistent unemployment. Uri Dadush confirms this in his interpretation of the global economy in his Policy Brief "The Global Outlook and Morocco". The analyst contends that global structural dynamics, but also stimulus packages in the US and China, appear to be strengthening the global economy.



Adopting a more academic approach, Tayeb Ghazi co-authored an article entitled "Growth and Jobs in Developing Economies: Trends and Cycles", published by the IMF. These central issues for economists were analyzed using Okun's law on a set of developing economies. The authors contend that the two variables are related, though there are disparities in the selected sample, averaging about 0.2. This elasticity implies that economic growth does not translate into job creation in a proportional manner.

The general debate is still focused on the factors that drive economic activity or job creation, but as the issue of environmental sustainability becomes increasingly pressing, more researchers are becoming interested in it. Rim Berahab looked into the carbon intensity of the global economy through a decoupling indicator defined as the ratio between the change in carbon dioxide (CO₂) emissions and GDP. Her Policy Brief entitled "Decoupling Economic Growth from CO₂ Emissions in the World" reveals that CO₂ emissions have been stable for the

third consecutive year despite economic growth, which bodes well for the decarbonization of production.

Sub-Saharan Africa

As a think tank from the global South, in 2017, OCP Policy Center explored the continent's structural transformation, China's role in its development, and regional integration.

An Emerging Continent: What Instruments can African Economies Exploit to Integrate the New Global Context?

In his blog "African Economies Integrate The New Global Context", Thomas Awazu Pereira da Silva explains how the rise of Pacific Asian nations could serve as a lesson to African countries who strive for economic integration, by accelerating their economies' structural transformation in a constantly shifting global context. In the 2000s, the dynamics shifted in a positive direction, with six of the 10 fastest-growing economies in the world located in Sub-Saharan Africa: Mozambique, Rwanda, Angola, Nigeria, Chad and Ethiopia. Sub-Saharan Africa grew at an average of 5% between 2000 and 2015, a dramatic change compared to the "lost decade" of the 1980's. The author highlights major challenges for the continent's economic integration and inclusive growth: weak institutions, the shortage of skilled labor, political instability, inadequate industrial policies and extremist threats.

China and Africa

Africa's natural resources and growth is attracting the interest of many global players. China is continuing its policy of massive investment, focusing on natural resources, in particular mining resources. In his Policy Paper "[Chinese Mining Investments in Africa](#)", **Henri-Louis Védie** indicates that there has been diversification in the transport and energy sectors, but also in mining (copper, iron, manganese), which is not a priority sector for China. Africa-China partnerships are increasingly "win-win", sweeping aside accusations of predatory or neocolonialist behavior on the part of China.

A study by **Françoise Nicolas** entitled "[Chinese Investors in Ethiopia: The Perfect Match?](#)", published jointly with the *Institut Français des Relations Internationales* (IFRI), discusses how relations have developed, often cordially, between China and Ethiopia since the fall of the Derg regime in 1991. Ethiopia hopes to emulate the experience of East Asian countries such as Taiwan, Malaysia or China, and attract Foreign Direct Investment (FDI), in order to accelerate the development of its productive capacity. As for China, it aspires to export its model of development, outsource its most labor-intensive activities and promote linkages between Asia and Africa. However, there is still a long way to go before this cooperation can bear fruit. China has played a useful role in Ethiopia, creating industrial parks, financing infrastructure and encouraging Chinese companies to transfer part of their manufacturing. This contributed to the country's industrialization. Economic transformation remains limited, however, given that local inputs don't always comply with Chinese standards. Moreover, skills transfers through labor mobility are also limited, as most of the workers are employed in low-skill jobs.

Africa's Industrialization at the Heart of the Debate

In "[Manufacturing Employment Elasticity and Its Drivers in Developing and Emerging Countries: Focus on Sub-Saharan Africa](#)", **Abdelaziz Ait Ali**, **Tayeb Ghazi** and **Yassine Msadfa** look into employment-to-GDP elasticity, providing estimates for a sample of emerging and developing economies, including 11 countries in Sub-Saharan Africa. They assess to what extent manufacturing activities are inclusive in sub-Saharan Africa, in terms of job creation, compared to the rest of their economy. They also explore the drivers of manufacturing elasticity on a global scale, in particular the role of structural, institutional and macro-economic variables. The study shows, inter alia, that there is considerable variation in employment-to-GDP elasticity between countries and sectors. Manufacturing elasticity performs better than overall elasticity in low-income Sub-Saharan countries, whereas it is lower than average in Latin American and Asian economies.

Africa and the Atlantic: Towards a New Strategic Space



OCP Policy Center promotes a wide transatlantic discussion, rethinking all the Atlantic's challenges, both in the North and the South. The aim is to encourage new geopolitics to emerge in this strategic region. The 2017 edition of the

[Atlantic Currents](#) annual report builds on the insights from the Atlantic Dialogues annual conference, focusing on Africa's

development outlook in the context of the Atlantic. The goal is to rethink the Atlantic, ensuring that the voice of the South is heard in international discussions.

Atlantic Currents, a report authored by **Abdelhak Bassou**, **Rachid El Houdaigui**, **Mohammed Loulichki**, **El Mostafa Rezrazi**, **Tayeb Ghazi** and **Yassine Msadfa**, discusses the continent's performance in terms of economic development, social security and governance. The first chapter, by **Mohammed Loulichki**, examines "The Africa-Latin America Partnership: Between Sentimentalism and Realism". He analyzes the historical and cultural links between these two regions, their economic potential and their contribution to "a new, more representative, fairer global order". Such a partnership would help Africa to find its own solutions by lending it strong support, in particular for agricultural development.

Abdelhak Bassou advocates seeing African migration in a more positive light, as migration is often undeservedly described as a scourge. He puts this phenomenon back into its context: migration in Africa is predominantly intra-African, with 80% of African migrants remaining in the continent. Five major host countries, which are also economic powerhouses, attract a large portion of these people: South Africa, Côte d'Ivoire, Nigeria, Kenya and Ethiopia. African migration to Europe is marginal. It is also an opportunity for host countries as well as countries of origin, given the need for labor in European countries with a dwindling workforce.

In this context, security and defense have been set as a priority for transatlantic cooperation. Africa is accused of being the source of many dangers such as terrorism, arms trafficking and drug trafficking. Indeed, as **El Mostafa Rezrazi** points out in his chapter "Facing the New generation of Terrorism and the Opportunities for a Common Continental

Responses Capabilities", terrorist attacks have killed over 20,000 people across the continent since 2012, in addition to causing infrastructure damage and negatively affecting economic performance in the countries hit by the attacks. In fact, according to the Global Terrorism Index, eight armed groups, with over 52,000 combatants linked to either the Islamic State (IS) or Al Qaeda, are present in Africa.

The author reviews existing mechanisms and factors that prevent the African Union and sub-regional blocs (SADC, ECOWAS, and G5 Sahel) from delivering a more effective response. He imagines a pragmatic scenario enabling a better African response in the Sahel.

Migration, security, and Africa's integration in the global economy raise the issue of African maritime governance and the measures it requires. In the chapter entitled "*Towards Africa's Ownership of its Maritime Reality and Potential*", **Rachid El Houdaigui** underscores that oceans are African territories that are grossly underestimated in development strategies, even as maritime trade and port activities play an important role in Africa. The 23 countries on the Atlantic coast represent 46% of the continent's population, 55% of its GDP and 57% of trade. With issues including maritime and territorial disputes and increasing threats (piracy, crime, terrorism), challenges will have to do with taking control over a maritime area where foreign powers have a strong presence, from logistics to the exploitation of natural resources to combating piracy.



When it comes to African integration, one must ask the right questions about actual convergence between the continent's regions, and the reasons behind its absence. Why does the Southern African Development Community (SADC)'s intra-regional trade represent 20% of its total foreign trade between 2014 and 2016, close to ASEAN (Association of Southeast Asian Nations) levels, while this figure is only 5% in the Economic Community of Central African States (ECCAS)? Inflation, fiscal deficits, foreign exchange reserves... The chapter authored by **Tayeb Ghazi** and **Yassine Msadfa** provides a detailed overview of convergence criteria and how they have evolved in various African regions. Ultimately, it gives a precise idea of the road ahead.

The report also compares some indicators of integration among various regions in the Atlantic area, starting from sub-regional blocs: 23 out of Africa's 54 countries, 30 Latin American and Caribbean countries, North America and 32 European countries, including Switzerland, Iceland, Norway and the UK. Findings revealed that **Africa represents just 2% of the Atlantic region's GDP**, versus 10% for Latin America, 44% for Europe, and 44% for the United States.

Morocco

The Moroccan economy's challenges are one of OCP Policy Center's key areas of interest, including the country's international position, social cohesion issues and sustainable development. Drastic changes in the international environment require Morocco to rethink its development model, based on expanding domestic demand and exporting to traditional, low-potential markets.

Against a backdrop of fiscal and external imbalances and a slowdown in traditional outlets, it appears crucial to accelerate the diversification of exports and their outlets, to better position Morocco in global value chains and to prepare it to compete on international markets of goods and services that are technology-intensive and require highly skilled labor. In this context, OCP Policy Center has focused on South-South cooperation possibilities, in particular in trade and investment. The Morocco-Africa-Latin America triangle is often considered to be the key to the emergence of a diversified, forward-looking Morocco, of a new Africa and of Latin America as it rebuilds its institutions.

In her Policy Brief "[Relations between Morocco and Sub-Saharan Africa: What is the potential for trade and foreign direct investment?](#)", **Rim Berahab** shows that growing trade reflects increasing integration. A similar trend can be seen in FDIs, which have consistently risen over the past years, a sign of Morocco's resolve to become a key player in Africa's development. These trends could be strengthened by a more favorable regulatory environment, adequate tangible and intangible infrastructure, as well as transfers of knowledge, know-how, and technology.

Using the same prism, **Sandra Polónia Rios**, **Pedro da Motta Veiga** and **Eduardo Augusto Guimarães** explored the relationship between Morocco and Brazil in a Policy Brief. The article, "[Morocco-Brazil Economic Relations: Current Situation and Strategies for a Deeper Relationship](#)", observes that only a few goods are traded between the two countries, and it has been quite a challenge to diversify and shift to more advanced models of integration.

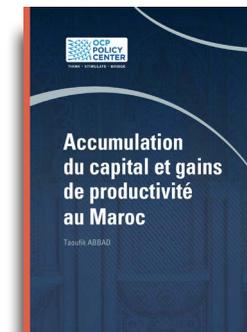
In their Policy Brief "[Road Map for Enhancing Morocco-Brazil Economic Relations](#)", **Sandra Polónia Rios** and **Pedro da Motta Veiga** show that certain aspects of each country's trade and industrial policies undermine their potential. Examples include high tariffs on many goods, but also trade agreements that give a competitive advantage to some of Brazil's competitors. As such, it seems crucial for the two countries to negotiate a free-trade agreement, in order for exporters to have favorable access conditions. The authors make some recommendations for future investment and tax agreements, so as to facilitate and protect investment and to reduce transaction costs. The roadmap between Brazil and Morocco also includes adopting complementary economic agendas regarding economic areas in Sub-Saharan Africa. Growing interest in Africa is at the heart of the South-South cooperation between the two countries. Brazil's and Morocco's strategies for Sub-Saharan Africa point to converging challenges, in an area open to bilateral initiatives, especially since the two countries are complementary in terms of sectors and geography. The only hurdle is that the two countries' approaches to Sub-Saharan Africa are evolving in different directions. In Morocco, the priority is increasingly to diversify partnerships. Brazil, on the other hand, has tended to withdraw from Africa, a policy which began in 2010 under Lula da Silva and has continued to date. For Brazil, cooperating with Morocco on West and East African initiatives could be one way of reversing the trend.

Beyond relations with Brazil, global value chains can also offer new opportunities, as **Larabi Jaidi** and **Yassine Msadfa** point out in "[The Complexity of the Rise of Global Value Chains: The Case of Automotive and Aeronautics Industries in Morocco and Tunisia](#)". The authors examine interdependent relationships between sectors and geographies for multinationals,

potential involvement of local businesses, and the complex links between technological and organizational innovation, geography and socio-political frameworks. These are all key factors for companies to position and establish themselves in global value chains. Leveraging these chains is not a goal in itself, but it is a means to achieve structural transformation, better competitiveness and steady growth.

Nevertheless, competitiveness is not limited to the breakdown of costs and prices. Other factors are also increasingly at play, in particular the quality of exports and whether they position themselves on the low-end or the high-end. In "[Accumulation du capital et gains de productivité au Maroc](#)", **Taoufik Abbad** explains that this equation is disappointing. Despite capital accumulation since the 2000s, productivity gains are slow to increase, undermining the transformation of the productive base.

While there has been social and economic development in Morocco, social reform has not quite kept up the pace. Inadequate management of social demands has weakened social cohesion. Without it, the country's development could be seriously undermined. **Abdallah Saaf** discusses this in his book "[Cohésion sociale, institutions et politiques publiques](#)" in which he analyzes the role of institutions for social stability and growth.



Structural transformation and transforming the economy remains a key issue in relation to social cohesion and sustainable development. Employment and social inclusion are a vital need for populations. They are also a major expectation for recent graduates (see "*Cohésion sociale, institutions et politiques publiques*"). Skills are mismatched in the labor market and the unemployment rate among recent graduates is about 20% (see Thomas Awazu Pereira da Silva in "*High and Persistent Skilled Unemployment In Morocco: Explaining it by Skills Mismatch*").

In addition, lower female participation in the labor force undermines women's empowerment, a driving force for growth, as is pointed out in "*Egalité de genre, politiques publiques et croissance économique au Maroc*". This book, coordinated by Rim Berahab and Zineb Bouba, with technical support by Pierre-Richard Agénor, provides a comprehensive assessment of the gender gap in terms of access to jobs, education, health and infrastructure. The authors conduct an econometric analysis of constraints to female participation in the labor force and evaluate public policies from a gender perspective, in order to identify the steps taken to ensure women's equal access to their civil, political, economic and social rights.

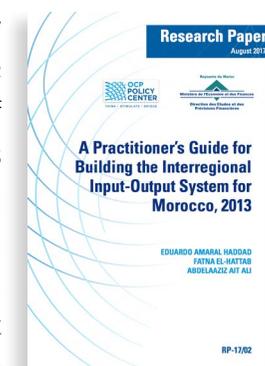


undermines women's empowerment, a driving force for growth, as is pointed out in "*Egalité de genre, politiques publiques et croissance économique au Maroc*". This book, coordinated by Rim Berahab and Zineb Bouba, with technical support by Pierre-Richard Agénor, provides

Our think tank continues to conduct in-depth analyses of imbalances in the national labor market. In his Policy Brief "*Jobs in the Middle East North Africa and the Moroccan case*," Uri Dadush discusses the challenges in Morocco's labor market. He indicates that demographic pressure should gradually ease in coming years, as fertility has been declining since 2000. One must also bear in mind that growth has been less labor-

intensive; it is constrained by issues related to substituting labor with technology and capital, as evidenced by recent high productivity gains. Morocco should focus more on its service sector, which continues to provide the most jobs, such as tourism, rather than focusing on manufacturing. Morocco should also negotiate with economies facing a labor shortage, for more orderly immigration.

To contribute to regional policymaking, OCP Policy Center partnered with the Department of Financial Studies and Forecasts of the Ministry of Economy and Finance on a project to provide information on the structure of regional economies. The result was an inter-regional matrix highlighting interdependences between sectors. "*A Practitioner's Guide for Building the Interregional Input-Output System for Morocco*" is a guide by Professor Eduardo Amaral Haddad, Fatna El Hattab and Abdelaziz Ait Ali, available [online](#). This matrix aims to help evaluate many policies and observe regional socio-economic trends.



The Middle East

The 2017 economic recovery experienced in the West remained tepid in the MENA region, exposed to political tensions and low oil prices. As a result, the region's economic outlook is very uncertain, according to Uri Dadush in his Policy Brief "[The Global Outlook and Morocco](#)". The inertia of the past years is a sign of structural deficiencies in the region's economies. The author addresses some of these in a different Policy Brief entitled "[Jobs in the Middle East North Africa and the Moroccan case](#)", in which he looks into the challenges of the region's labor markets. Oil-importing countries (Morocco, Tunisia and Egypt) are struggling to create jobs, in particular for their youth. On the other hand, Gulf countries are facing low labor force participation rates, due to the massive numbers of foreign workers.

According to Simone Tagliapietra, this situation undermines diversification in the Gulf - an imperative in the context of the Paris Agreement on climate change. In his article "[The Political Economy of Middle East and North Africa Oil Exporters in Times of Global Decarbonisation](#)" (a chapter in the book "[Towards EU-MENA Shared Prosperity](#)", co-published with Bruegel), the author contends that decarbonization should encourage MENA oil exporters to become less dependent on oil revenues and to accelerate structural transformation. This means that sovereign investment should shift to new flourishing sectors, rather than financial or real estate speculation. In the second chapter of "[Towards EU-MENA Shared Prosperity](#)", Marion Jansen and Mario Filadoro call for a deeper integration of the region's SMEs into global value chains. The question is whether successful integration in some sectors can be duplicated in other sectors and with different trade partners.



GEOPOLITICS AND INTERNATIONAL RELATIONS

"OCP Policy Center is interested in international relations, geopolitics and security/defense, with the aim of helping to pacify international relations. These matters are of particular interest since they are interdependent with OCP Policy Center's other areas of research."



Since the Cold War ended, terrorism, isolationism, populism, new forms of war, migration and various crises have characterized international relations, which no single qualifier can aptly describe. Ontologically, they are anarchic, in the sense that no sovereignty prevails over other sovereignties. But nowadays, international relations are also anarchic in a different sense: the absence of direction and regulation.

The unipolar order envisioned by Francis Fukuyama, who predicted a victory of capitalist democracies and the US becoming the prevailing world power, quickly vanished with Obama's discreet withdrawal and his famous doctrine of "leading from behind". This was further confirmed with Donald Trump's America-First populist isolationism.

Other paradigms briefly cropped up but quickly disappeared. Multipolarity, with the illusion of emergence of certain new powers, and nonpolarity after the lack of interest they showed in the great issues that shake the world - such paradigms only lasted for very brief moments.

Dismayed by the disastrous events of the Arab Spring and the chaos they caused in Syria, Libya and Yemen, the former powers of the West quickly abandoned the values they had been advocating and attempting to impose on the rest of the world. Instead, they started demanding just one thing instead: stability. Fearing an African Spring, these powers appear to no longer insist on democratic governance, but simply good governance, no matter its nature - any governance is good as long as it maintains stability. The concept of enlightened dictatorship has risen from its ashes. These powers maintain

their mercantile reflexes, but leave it to other entities to advocate other governance doctrines. Putin's Russia, Erdogan's Turkey, Rouhani's Iran and Mohammad bin Salman Al Saoud's Saudi Arabia fill the void and establish, in the name of sovereignty, a kind of "Do-as-you-wish-at-home-you-are-sovereign" policy, reducing the role of the international community to a simple witness.

In the Middle East, the strategy is best described by the words improvisation and indecisiveness. Trump, Obama, and the others Presidents before them, never made up their mind as to whether they wanted Bashar Al-Assad to remain in power. They also never clearly decided whether they, themselves, would stay in Syria.

In Africa, Europe is undertaking multiple initiatives to combat terrorism, with no vision nor coordination, and hasn't achieved notable results. The scourge even seems to be on the rise. Russia uses this as an opportunity to learn from its experience in Syria.

In 2017, OCP Policy Center's publications on international relations, in particular in Africa, have repeatedly pointed out how complex these relations are.

The think tank's researchers cover a broad range of topics, from economics to geopolitics, to politics and security, and examine the world's realities and the currents that pass through it. OCP Policy Center's publications analyze the strategies of some countries or entities, and attempt to assess the regional and transnational impact of other strategies on the world and its regions.

Africa

Many of the think tank's publications focus on the continent's development, to be achieved by seeking strategic autonomy or by exploiting resources more rationally.

In 2017, Africa saw Morocco return to the AU. **Abdallah Saaf** discusses this in his Policy Brief on "[Morocco's great return to the African Union](#)". The author lucidly examines the challenges that come with this historic turning point from a socio-economic, political and security perspective. He also asserts that Africa's structural challenges can only be overcome with measures that harmoniously combine mutual collaboration, institutional reform and a common resolve for economic development.

Such a development effort also depends on the extent of strategic autonomy. **Rachid El Houdaigui** explores this matter in the wake of the [APSACO international conference](#) on the subject "[African Union: What Are the Possible Options for Strategic Autonomy?](#)". He points out that African countries are encouraged to further involve African civil society and citizens in decision-making processes so as to ensure the continent's strategic autonomy, and therefore its development in a changing world.

The continent's development also depends on the rational exploitation of its countless valuable resources. In his Policy Brief "[Africa's natural resources and geopolitical realities](#)", **Abdelhak Bassou** highlights the need to end the various forms of conflict over natural resources, adopting a common strategic vision and continental solidarity which would benefit all. The author also discusses social inequality and the need for fair distribution.

South-South relations

OCP Policy Center's publications have focused greatly on South-South cooperation, exploring not only Morocco's current and future place in relations between African countries, but also between Africa and other countries such as Brazil, China and India.

The Policy Paper "[Brazilian and Moroccan policies for sub-Saharan Africa: Description and some Elements of Assessment](#)", co-authored by **Pedro Da Mota Veiga** and **Sandra Polonia Rios**, looks into South-South cooperation activities and strategies between Morocco, Brazil and Sub-Saharan Africa. Backed by facts and figures, the authors describe opportunities and challenges for this triple relationship. They recommend that Morocco define its local position in the face of globalization's challenges, before defining its international position.



China, which since the turn of the century has been a part of Africa's economic reality, and Morocco, which increasingly looks toward the continent, would benefit from collaborating and jointly organizing their actions in Africa, using their respective advantages. With this idea in mind, **Fathallah Oualalou** proposes a relevant agribusiness partnership between the two countries. He outlines this project in his Policy Paper "*Chine-Maroc-Afrique, un partenariat agroalimentaire novateur*".

Also on the subject of China, **Françoise Nicolas**, in a Policy Paper jointly-published by IFRI and OCP Policy Center entitled "*Chinese Investors in Ethiopia : The Perfect Match?*", analyzes China's investment and development projects in Ethiopia, and discusses the opportunities and challenges that they bring.

The year 2017 has also seen stronger bilateral relations between Morocco and India. In her blog "*India-Morocco Ties: Looking at Cooperation from an Agricultural Perspective*", **Ihssane Guennoun** outlines the two countries' economic relations, mainly focused on agriculture, and highlights their common and complementary interests for a win-win partnership.

Lastly, in his Policy Brief "*When politics darkens the independence of South African justice*", **Mohammed Loulichki** reflects back on the South African High Court's decision to seize the Moroccan phosphate cargo en route to New Zealand. The author reviews the facts and bases his analysis on the legal inaccuracies in the case.

United States and China

The relationship between Washington and Beijing has always been prone to diplomatic and political twists and turns. In their power play, the two countries seek to establish themselves as economic super-powers in an ever-changing world.

In a paper jointly published by IFRI and OCP Policy Center, entitled "*Les Etats-Unis face à la Chine de Henry Kissinger à Donald Trump*", **Laurence Nardon** provides a timeline of the events that influenced US-China relations the most since 1970. She encourages the reader to reflect on the future of this North-South relationship and its impact on both hemispheres, especially since Donald Trump's rise to power. In fact, the current tenant of the White House has not hidden his desire to rebalance trade relations between the two countries in order to make the United States of America the world's indisputable economic leader.

Peace and Security

The dynamics at play in today's world evolve according to economic, security, and political needs. Defense remains a key issue. **Rachid El Houdaigui** discusses this in his Policy Brief "*Defense, Time for Necessary Adjustments*". For the author, the debate on defense is more topical than ever in a constantly changing world, in which geostrategic equilibria are being continuously reconfigured and where State budgets are suffering the consequences on the economic and financial crises. He questions whether defense policies will be up to their future tasks and whether the military leaders' strategists will have sufficient means to effectively negotiate the adaptation process.

To the author, adaptation will require changes in governance in order to balance three issues: the interaction between defense and security, stepping up civilian and military research and development, and modernizing defense through international partnerships.

In his Policy Brief "African Architecture for Peace and Security: Design relevance and achievement challenges", **Abdelhak Bassou** questions the effectiveness of the institutional architecture designed by the AU to contain growing threats in the region to enable lasting economic prosperity. He considers that Morocco's return to the AU "constitutes an advantage on which the AU can capitalize to improve its structures."

Also on the subject of security, in a Policy Paper jointly published by OCP Policy Center and IFRI entitled "*Qu'est-ce qu'une bonne réforme du secteur de sécurité ?*" ("What is a good security reform?"), **Aline Leboeuf** outlines the necessary conditions for reforming the security sector, and proposes a number of appropriate and diverse actions. She particularly emphasizes good governance practices, the importance of hiring competent staff, and adopting a sustainable and pragmatic vision.

Are security and economic development opposite sides of one coin? **Abdelhak Bassou** attempts to answer this question in his Policy Brief "Development and/or security: Issues concerning the relationship between the European Union, the Maghreb and the Sahel". Using the example of two major oil and gas producers, Libya and Nigeria, he shows that wealth does not always lead to security, and vice versa. This equation speaks to the complexity of each country's local realities, and illustrates that it would be preferable for the EU to adopt a personalized neighborhood policy rather than a standard one.

Following this logic, African countries should reform management of political and administrative affairs, by encouraging a local and inclusive participatory approach, writes **Sara Hasnaa Mokaddem** in her Blog "*Perspectives politiques du futur de l'Afrique : renforcement de la gouvernance démocratique pour répondre durablement aux défis de développement et de sécurité*" ("Africa's political outlook: strengthening democratic governance to address development and security challenges").

The specter of Islamic terrorism looms across the world. This is an ever-changing threat with dreadful consequences, causing a feeling of malaise all over. Terrorism heavily and negatively affects Africa, sometimes even making the continent a breeding ground for extremist groups.

In their Policy Brief "Al Qaeda vs. Daech in the Sahel: What to expect?", **Ihssane Guennoun** and **Abdelhak Bassou** analyze the challenges and consequences of the terrorist threat in the Sahel, mostly at the hands of the so-called Islamic State, Al Qaeda, and other terrorist cells in the region. They additionally compare each group's ideological dynamics and political aspirations. The two experts also discuss the mechanisms put in place by the members of the G5 Sahel, jointly with other countries in the world, to ensure security in the area.



Because of the complexity of its territory and its geopolitical atmosphere, the Sahel was the subject of a Policy Brief, called "State, Borders and Territory in the Sahel: The Case of the G5 Sahel." In this publication, **Abdelhak Bassou** closely analyzes the nature of the conflicts and challenges facing local governments, questioning the notion of State, border and territory.

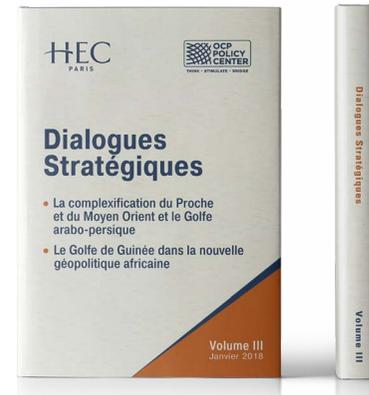
The same author addresses the issue of terrorism in his Policy Brief "Foreign terrorist fighters: the time of return." He describes the indoctrination process that Islamic groups use to recruit fighters, and explores some measures to perform the challenging task of reintegrating former jihadists, in a context where terrorist organizations are becoming weaker in the Middle East.

To Christopher S. Chivvis, author of the book "Challenges for Counter Terrorism Cooperation in North Africa", the United States and Europe share a common interest in countering growing terrorist threats from North Africa. The Islamic State (IS) has emerged as a force to be contended with in the region - in particular in Libya, but also in Egypt and, to a lesser extent, Tunisia, Algeria and Mali - raising great concern. The challenge of fighting IS is aggravated by the fact that older terrorist organizations still persist locally and regionally, such as Ansar al-Sharia or Al-Qaeda in the Islamic Maghreb (AQIM), Al Qaeda's local branch. Though IS was targeted by many with the goal of driving it out of its refuge in Sirte on the Libyan coast, the potentially large number of fighters continues to threaten regional security.

IS and other groups continue to jeopardize the interests of the United States and Europe in the region, and also contribute to the migrant crisis in Europe through the central Mediterranean. To date, terrorist groups in North Africa are

an obvious challenge for transatlantic security, even as other issues in the Levant and Eastern Europe draw much of the attention of decision-makers.

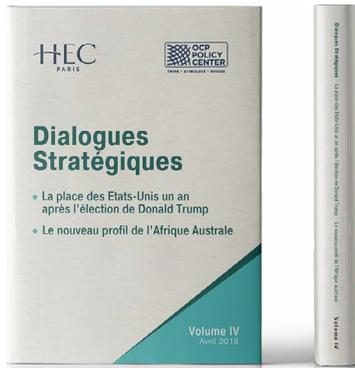
Strategic Dialogues



On April and October 2017, the strategic partnership between HEC (Center for Geopolitics) and OCP Policy Center led to the organization of two events which resulted in the publication of the 3rd and 4th volumes of "Dialogues Stratégiques"

(Strategic Dialogues). In Part I of Volume 3, which focuses on the increasing complexity of the Near and Middle East and the Persian Gulf, the authors contend that, during a year where the region had seen several upheavals, geopolitical redistribution had been the key change. They maintain that the new situation ought to be the focus, both from a geopolitical perspective with alliances and misalliances, and from a military perspective with increasing weapons purchases in the region. This part of the book analyzes the players, challenges, and facts in this new Middle East.

Part II is about the Gulf of Guinea in current African geopolitics. The authors see Africa as gradually taking back its central place in the world, through the economic emergence of some African countries as well as the continent's population boom. According to the authors, Africa's geopolitical order is changing and should be analyzed. They use the Gulf of Guinea as a perfect example of Africa's challenges and its new socio-economic circumstances.



Part II of Volume 4 focuses on "*La place des États-Unis un an après l'élection de Donald Trump*" (The Place of the United States, One Year Into Donald Trump's Presidency). The authors express the concerns of the international community, explore the United States'

economic and geopolitical role under the Republican president, and reflect upon whether he has kept his promise of "making America great again." They recognize the paradoxes of US domestic policy, and consider which strategies the Europeans and other players in the international community should pursue. Some authors examine US-Russia and US-Europe relations, characterized by both tension and cooperation. Other contributors to Part I of Volume 4 analyze the US strategy in the Middle East and in Africa.

Part II of Volume 4 focuses on southern Africa, in particular the Southern African Development Community. Authors discuss South Africa's hegemony in the region, and its economic consequences.

Articles also analyze Asian players' (China, Japan and India) position in the region, and the growing competition among them. Lastly, maritime issues in the region are tackled in a chapter on the Mozambique Channel.

The Politics of Industry

The transformations discussed are enabled by a number of factors, such as energy and other commodities that are key in rebalancing industrial policy. One such commodity is steel, which **Yves Jégourel** discusses in his Policy Brief "**Multilatéralisme : quelle résonance (géo) politique pour l'acier ?**"

He affirms that while energy is at the heart of geopolitics, other commodities should also be taken into account to explain some shifts on the international, economic, and political stage. Steel is one of them since the 19th century. Nowadays, according to **Yves Jégourel**, in the context of sluggish domestic demand, the considerable expansion of Chinese output and exports has a very strong impact on the historical producers.

Anti-dumping measures were taken in the US, Europe and Morocco, in order to make local industries competitive again on their domestic markets. The author concludes that it is up to relevant authorities to judge whether such measures are legitimate, but it is clear that this area is of great political relevance, both domestically and internationally.



Digitization of the Space Industry: The World from Above

In a paper jointly published by IFRI and OCP Policy Center entitled "New Space: The Impact of the Digital Revolution on Space Actors and Policies in Europe", **Laurence Nardon** affirms that just like other "traditional" industries, the space industry is confronted with the challenges of a digital world. She argues that the European Space Agency now has to deal with new players from that world, mostly from America, including start-ups or Silicon Valley giants such as GAFA. They use new methods such as quicker decision and production cycles and more private financing, and rebalance priorities between those of the developer and the client.

According to the author, the digital revolution has specific characteristics when it comes to the space industry. It isn't just processes that are changed, but also the type of services that transit through satellites. For example, telecommunications satellites are shifting from distributing television channels to distributing bandwidth for digital content.



AGRICULTURE, ENVIRONMENT AND FOOD SECURITY

"With extensive work and numerous publications to its name, OCP Policy Center has looked into the issues and challenges of agricultural development, food security and the environment."



As a pillar of economic development in African societies, in 2017, the agricultural sector continued to grow, contributing to the transformation of rural areas, driving economic growth and improving the standard of living in the continent. Despite the progress, a general sense of dissatisfaction prevails among the stakeholders to Africa's green revolution.

To tap into the enormous potential for wealth creation of agricultural value chains by developing a globally competitive agribusiness sector, the road ahead presents major challenges.

Based on experience in agricultural development, governance of public and private institutions or on the findings of scientific research, the agricultural world agrees that public policies must be improved in order to achieve its ambitions.

For OCP Policy Center, in 2017, much thought has been given to how to make public policies (economic policies in general, and agricultural policies in particular) more relevant and more effective in improving well-being. Public policy mainly targets agricultural productivity. Many authors consider it to be the cornerstone of economic and social progress, in particular in developing countries. In their Policy Brief "*Revival of Agricultural Productivity in Africa: Hoping for Better Food Security*", **Mohammed Rachid Doukkali** and **Tharcisse Guèdègbé** investigate the dynamics at play for this crucial factor in Africa.

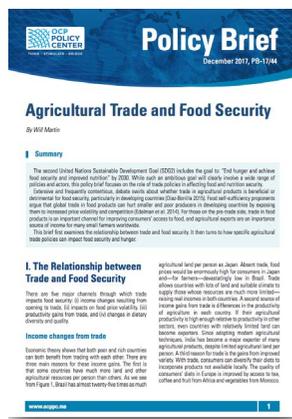
In this publication, the two authors examine the role of the agricultural sector as the key to inclusive growth in the continent, drawing a parallel between the lessons from economic literature and the role of the agricultural sector

in African economies today. They consider that growth has been of good quality and productivity, from all the factors of agricultural production.

However, one must bear in mind that different countries have very different trajectories when it comes to improving total productivity, and that productivity gains have not contributed much to agricultural growth. In this context, the analysts call for an acceleration in creating the conditions that enable productivity gains, in particular through research and development, technological transfer, and appropriate reforms and investment strategies, particularly for infrastructure.

Agricultural economists at OCP Policy Center have been very interested in the increasingly clear vision of an integrated Africa. They discussed how to make it a driver of development, impacting productivity and competitiveness, but also vice versa, making agricultural development a driver of African integration. **Mohammed Rachid Doukkali**, **Tharcisse Guèdègbé** and **Fatima Ezzahra Mengoub** presented a realistic perception of African integration in the agricultural sector. This is the topic of their Policy Paper "*Diversité de l'agriculture africaine et commerce intracontinental : quelles opportunités pour l'intégration ?*". In this publication, which was presented at Morocco's Economic, Social and Environmental Council (CESE), authors explain how agriculture could drive integration in Africa.

By analyzing agricultural productivity and output by agro-climatic zones, export capacity and trade complementarities, the authors show how the agricultural sector could improve, benefit more from trade, and climb up the value chains, if public policy allowed for more technical and technological transfers within the continent. The authors emphasize the importance of coordinating public policies and implementing regional strategies to make Africa's agricultural diversity a true force for integration.



As a central tenet of integration, agricultural trade is at the heart of Will Martin's analysis in "Agricultural Trade and Food Security." In this Policy Brief, Martin weighs in on the discussion on opening up trade for the sake of global food security. He describes the relationship between trade and food security, highlighting

four transmission channels: (1) higher income with more trade openness, (2) the impact of such openness on food price volatility, (3) productivity gains from trade and changes in the diversity, and (4) quality of diets.

Will Martin then makes some recommendations for public policy, in particular trade policies to eradicate poverty and hunger. These are based on a critical view of protective trade policies in developed and developing countries alike. He emphasizes that while price stabilization policies are effective, they lead to more inflation and price instability on the global market.

The Environment at the Heart of Discussion

Environmental matters have also represented a significant area of our experts' work. Climate change, sustainable management of natural resources, efficiency and productivity when using these resources, are just some of the issues tackled to ensure fair and sustainable development in climate-sensitive areas like the MENA region.

Strategies of Adaptation to the Adverse Effects of Climate Change

Natural resources are now under structural pressures. These pressures may be due to human activity, resulting from the need to increase production to meet perpetually growing demand, or to natural factors in the form of natural disasters caused by the likely effects of climate change.

In his Policy Brief "Climate Change and the Water-Energy Food Nexus in the MENA Region" Rabi Mohtar looks into the issue of climate change. He analyzes the impacts of climate change on water, energy and food security in the MENA region. This region will probably be among the most heavily impacted by climate change, yet opportunities could also arise if MENA countries include adaptation and mitigation strategies in their development plans.

In order to develop effective strategies to adapt to the adverse effects of climate change, one must understand the link between climate change and the water-energy-food nexus. Strategies should be four-pronged: human development, building institutional capacity, reducing the impact of climate change, and risk management. The author emphasizes that a nexus approach to water resource management is undeniably the key to climate change resilience.

In a similar vein, in his Blog "[Harvard Arab Conference : Key Takeaways](#)", [Khalid Berradi](#) writes about his participation in the Harvard conference. He discusses the ideas and recommendations he shared with participants and strongly emphasizes the need to adopt a comprehensive integrated approach in natural resource management, especially in the face of climate hazards.

Renewable Energy in the MENA Region: An Undeniable Asset

The MENA region is seen as one of the world's regions most likely to develop renewable energy, given the availability of alternative energy sources. By contrast, this region lacks the human capital and the favorable socio-economic and political conditions to enable such progress. These new forms of energy offer potential for socio-economic development. Rabi Mohtar discusses Arab countries' ability to seize such opportunities, leading the shift toward renewable energy, and to use it to meet challenges of their own. In a Policy Brief entitled "[What Role Can Renewable Energy and Water and Food Securities Play for North Africa and the Middle East?](#)", the author analyzes this region's specific opportunities and challenges in making the shift toward renewable energy in an effective and progressive manner.

He shows that a well-planned renewable energy portfolio in the region can help achieve sustainable development goals. To meet these challenges, the MENA region must step up the involvement of its public and private players and civil society.

Water Resources: Efficiency, Productivity and Integrity

Morocco's situation in terms of natural resources is not dissimilar to that of other MENA countries. Like other countries in the region, the Kingdom has scarce water resources, which are shared among various sectors (agriculture, drinking water, energy, etc.). An integrated approach to water resource management in private and public sectors is a necessary condition for sustainable and lasting economic and social development.

The Policy Brief "[Morocco's Water Security : Productivity, Efficiency, Integrity](#)", published jointly by OCP Policy Center and Global Nexus, explores the issue of water resource management in a context where water is scarce, and proposes to act on three indicators to ensure water security. The first is productivity, in particular how water adds value in the value chain. The second is efficiency, which is to say minimizing water use. The third is adopting integrated approaches for sustainable water resource management.

COMMODITY ECONOMICS AND FINANCE

"In 2017, OCP Policy Center analyzed broad global trends in commodity markets, examining the factors that determine their prices and the impact of price fluctuations on market economies, with a special focus on food, mining and energy and from a Global South perspective."



Commodity price dynamics are at the heart of the publications of OCP Policy Center's Commodity Economics and Finance program, in the context of soaring metal prices in 2016 and 2017, after the difficult years of 2014 and 2015.

Price Trends & Cyclicity

As Yves Jégourel points out in his Policy Brief "Too high, too fast, too loud? Questioning the soaring prices of minerals and metals", market fundamentals have significantly improved, both on the demand and the supply side. However, speculation has also played a significant role. In the short term, high prices could be corrected with profit taking and a return to more rational behavior. Declining prices since early 2018 largely confirm this analysis. In the longer term, high prices could encourage investment decisions and lead to a supply far exceeding demand.



To explore commodity price dynamics, one must look at (very) long-term trends, medium/long-term cycles and short-term variability/volatility. Thus, Yves Jégourel analyzes long-term trends in a new Policy Brief, "Trends and cyclicity of commodity prices (Part 1): debating the Prebisch-Singer hypothesis". This hypothesis

states that the prices of raw materials (exported) decrease relative to those of manufactured products (imported) over time, which leads to a deterioration of the terms of trade for commodity producing countries. This hypothesis raises the issue of how appropriate it is for many African countries to specialize in commodities, and therefore, on relevant

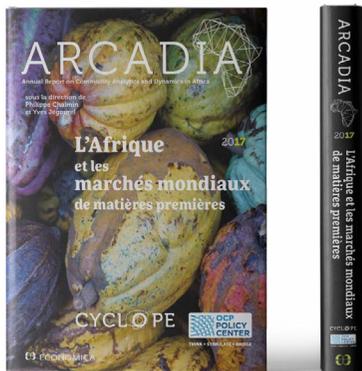
strategies to increase diversification to stimulate growth and economic development.

New Quantitative Analysis and Forecasting Methods

Authors in the Commodity Economics and Finance program proposed some forecasting tools in a book called "Quantitative Tools to Understand and Forecast Commodity Markets", co-edited by Ahmed El Ghini, Yassine Msadfa and Youssef Saidi. Their goal is to understand developments and dynamics in commodity markets, which have a significant impact on income and well-being in consumer and producer countries alike.

Commodity Markets: A Slightly More Confident Africa

The Commodity Economics and Finance program has issued many publications. The second **Report on Commodity Analytics and Dynamics In Africa (Arcadia)**, published in June 2017 and co-edited by Philippe Chalmin and Yves Jégourel, is the result of collaboration between OCP Policy Center and CycloPe, which publishes the reference global report on commodities. In a context where many commodity prices rebound and investment is still going strong, this 344-page document reviews the markets for cacao, coffee, iron ore, oil, gas, copper, phosphate and many others. The report also highlights many African countries' resilience in a relatively unfavorable global context, but also underlines that the situation is quite different from one country to the next, in terms of economic performance and exposure to global commodity shocks (agriculture, mining, energy).



In the same context, **Yves Jégourel** summarizes the Arcadia report's conclusions in a Policy Brief "Africa and global commodity markets: from cyclical realities to structural challenges". He paints a mixed picture with a slight improvement

in Africa, despite macro-economic heterogeneity. The author addresses structural challenges such as making the mining sector more attractive, electrification and enhancing food security. When discussing global commodity markets, one would be remiss not to look into China's role. With this in mind, **Henri-Louis Védié** wrote a Policy Brief called "Chinese Mining Investments in Africa". These investments are key since they have profound economic and geopolitical impacts. The author points out that China has expanded its presence in 2017, but this has been the case in many sectors: for instance, the transport and energy sectors have benefited from Chinese capital much more than mining has.

In her Policy Brief "Electricity in Eastern Africa: The Case for Mini Hydro", **Hélyette Geman** argues that electricity production must be multiplied by a large factor in coming years for East Africa to reach the economic growth rate it needs to improve its socio-political situation. She advocates in favor of hydropower as an adequate energy source, as it preserves the environment and can serve remote regions at an optimal financing cost.

Is Africa's Mining Sector a Priority for Chinese Investors?

In his Policy Brief "Chinese Mining Investments in Africa", **Hervé Louis-Védié** zooms in on the nuts and bolts of Chinese mining investments in Africa. On the basis of facts and figures, the author describes these investments. He details the minerals sought by Chinese operators and lists recipient countries.

According to the author, Chinese mining investments are benefiting a dozen African countries. These twelve countries are home to a total of 20 deposits. In Part II of his article, he affirms that contrary to a widespread belief, the mining sector is not a priority for Chinese investors.



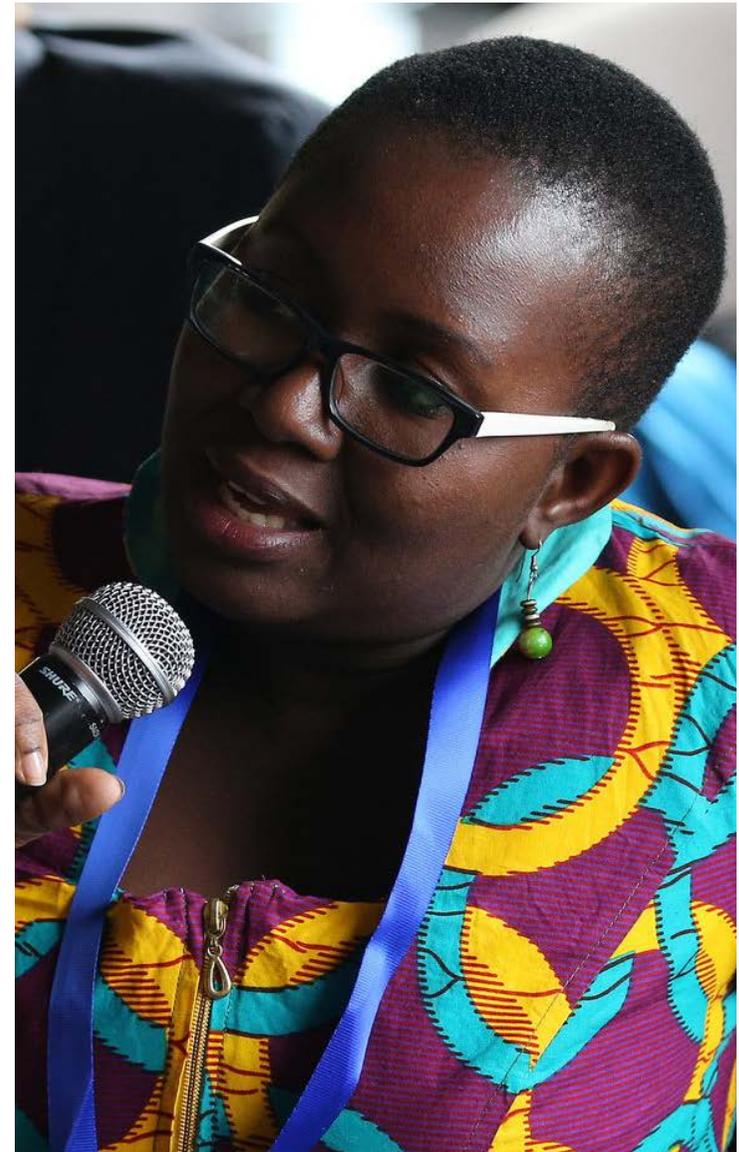
STIMULATE

Atlantic Dialogues Emerging Leaders Program

The 2017 edition of the **Atlantic Dialogues Emerging Leaders (ADEL)** program brought together **50 professionals** aged 23 to 35 for personalized sessions and workshops ahead of the Atlantic Dialogues conference. The participants were selected from over **1,000 candidates**, and distinguished themselves by demonstrating leadership and initiative, their vision in their respective areas, and their impact on their community, with a clear resolve to include countries from the Global South in the transatlantic dialogue.

At the 2017 edition, for the first time since the program's inception in 2012, the African continent was substantially represented with **50% of participants**. The strong African participation can partly be explained by the theme of the Atlantic Dialogues, which was "**Africa in the Atlantic: Time for Action**", and which aimed to include more African voices in international forums.

The gender balance was almost perfect, with **23 women** and **27 men**. 15 participants were from the private sector, and most were entrepreneurs. In short, the 2017 Atlantic Dialogues Emerging Leaders were a diverse, strong group that embodied the spirit of the conference.



50

Participants



23

Women



27

Men



1

During Day 1, the 2017 ADEL took part in several activities, including a panel on "Technological changes, skills and jobs of tomorrow" with Nigerian scientist Ade Mabogunje, a design thinking specialist at Stanford University, and Martine Kappel, a Danish expert in personal development and the founder of True North Leadership in Kenya.



2

Day 2 took place at Mohammed VI Polytechnic University, where the 2017 ADEL cohort met their elders for an inter-generational dialogue. Over 80 people participated in the discussion. OCP Policy Center successfully organized brainstorming workshops to create an engaging platform for the Atlantic Dialogues Emerging Leaders community.







The emerging leaders also joined as fully-fledged participants in the Atlantic Dialogues conference which immediately followed the program. They were able to meet key figures from the Atlantic basin. The aim of an emerging leaders program within the Atlantic Dialogues conference was to foster dialogue between generations.





In this edition, the ADEL had one minute each to present to the audience their ideas for projects with a strong impact on social, economic and political change. This series of talks was one of the new features introduced during this edition.



Summer Internship Program

Exceptional opportunities to help young people thrive



OCP Policy Center offers 3-6 months full-time internships for advanced students and recent graduates. The goal is for interns to gain practical experience and to develop their skills in research, event organization and project management.

Interns are supervised with care and are involved at every level, as their activities can range from research work and the preparation of draft reports to the compilation of statistical

data, administrative duties, assisting with event and media management, project management, and more. Interns are also encouraged to actively participate in research seminars, round tables, workshops, and discussion groups hosted by OCP Policy Center and its partners, addressing a wide variety of topics critical to the strategic interests of Morocco and the African continent.



Lotfi El Jai

Intern at OCP Policy Center in the summer of 2017

" I truly enjoyed my time as an intern at OCP Policy Center. It was a short experience, but I learned so much. After continuing my studies in the United States, I chose to go back to Morocco in the summer of 2017 for an internship with OCP Policy Center team, confident that this was a unique opportunity. With the benefit of hindsight, I can tell you that I was right. OCP Policy Center not only gave me a good experience as an intern, but also helped my transition to a Master's degree in international affairs. My degree is very cross-disciplinary, just like my experience at the think tank. I was able to work on subjects ranging from international relations to economics, migration, education, security and more, from a Global South perspective. In just 3 months, this internship truly equipped me for the rest of my university program. OCP Policy Center staff are very qualified and always make sure that each intern appreciates their experience as much as possible. Staff are always there to support you, ensure that you are fully involved in your internship and really help you grow as a professional.

During my internship at OCP Policy Center, I had contact with many influential policy-makers and politicians, such as Paulo Portas, former Deputy Prime Minister of Portugal.

In short, it is an environment that encourages people to give their very best and where your contribution is acknowledged and appreciated. It has shattered the stereotypes I held on internships in Morocco."

Volunteer Club

Helping students and youth enter the job market



To help organize and run events, OCP Policy Center offers the opportunity to students and young professionals, in the early stages of their careers and who are interested in our think tank's areas of work, to be directly and operationally involved in preparing conferences, acquiring practical experience in institutional events.

In 2017, over a hundred volunteers were selected through a call for applications. They actively contributed to the success of our events.



BRIDGE

Conferences, Seminars and Strategic Dialogues

Economics, development, security, international relations... On many subjects, OCP Policy Center was directly implicated in about 60 events in 2017, as a host, organizer, or partner in the debates.

Publications were presented to a dozen institutions in Morocco to gain a deeper understanding of public policies. **32 round tables, seminars and workshops** took place in the think tank's headquarters in Rabat, with national and international experts of all backgrounds, in a spirit of openness, dialogue and sharing.

A new annual conference was launched in July 2017 with the first edition of the **Africa Peace and Security Annual Conference (APSACO)**. The event aims to initiate an African in-depth discussion on security, while also addressing the issue of Africa's place in global geostrategic discussions. The theme of the first edition of **APSACO** was "**African Union: What are the Possible Options for Strategic Autonomy?**". The conference brought together about a hundred participants, policymakers, members of the military, experts and civil society representatives from 20 countries including 16 from Africa.

Africa was also at the heart of discussions at the 6th edition of OCP Policy Center's **Atlantic Dialogues** conference, held in December 2017 in Marrakech. The subject of the conference was "**Africa in the Atlantic: Time for Action**". It brought together

over **350 participants** from **70 countries** in Africa, Europe, North America and Latin America. In addition to the plenary sessions, dinner-debates also took place, which represented an opportunity to have informal discussions on specific topics in smaller groups.

Since the conference was launched in 2012, it hasn't lost sight of its initial objective: to "change mental maps" - in other words, to make the South Atlantic basin part of global geostrategic discussions, through a balanced and informed debate in which the voices of the South can be heard.

In addition, OCP Policy Center co-hosted or participated in **55 international conferences** around the world, from New York to New Delhi, to São Paulo, Rabat, Addis Ababa, Paris, London and Brussels. The think tank partnered with diverse institutions such as the World Bank, the Haut-Commissariat au Plan, *Institut Montaigne*, the *Cercle CyclOpe* or the Ethiopian Development Research Institute (EDRI), to name a few.

In partnership with the Paris-based European Union Institute for Security Studies (EUISS), and with the support of the Compagnia di San Paolo, on April 4 2017, OCP Policy Center hosted the **EU-Africa Strategic Dialogues**, as part of the work for the "African Futures" report published in September by the EUISS. The conference held a prospective discussion of African trends by 2025 and their impact on Europe.

Similarly, the second edition of the Arcadia report on Africa in the global commodity market was presented in Paris with Cercle CyclOpe, taking stock of the impact of global economic conditions on the continent and offering a coherent overview of Africa's challenges. The first Strategic Dialogues between Morocco and Ethiopia took place in Addis Ababa. They focused on South-South cooperation and integrating the continent in global value chains. Among the 2017 highlights was also the conference on **Africa's political outlook ("Perspectives**

Politiques de l'Afrique"), which took place in Rabat with renowned African experts. It was an opportunity to have an in-depth debate on crucial matters for the future of the continent.

The Middle East and North Africa were not neglected: the report on the MENA region's economic outlook was jointly presented in Rabat by the World Bank and OCP Policy Center. **"Six Years After: Towards a New Social Contract"** was the subject of the debate.





55 Events



11 Countries



13 Cities





2
Events
Brussels

2
Events
Rome

1
Event
New Delhi

2
Events
Addis Ababa





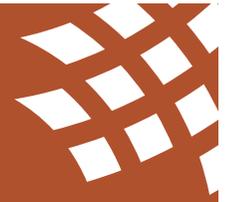
Our **Major** Events

OCP Policy Center launches two new conferences

When going over OCP Policy Center's numerous 2017 events, rather than providing a list in chronological order, we decided to start with our two brand new events.

At OCP Policy Center, 2017 has been the year of two major novelties: the first edition of the Africa Peace and Security Annual Conference (APSACO), and the first edition of the Strategic Dialogues between OCP Policy Center and the Ethiopian Development Research Institute (EDRI).

Our **major**
events



First Edition of the Africa Peace and Security Annual Conference (APSACO)

July 2017 - Rabat



The first edition of the Africa Peace and Security Annual Conference (APSACO) was launched on July 10 and 11, 2017 in Rabat. It aimed to spark an African debate on security, and on the continent's contribution to the global geostrategic discourse. The theme of the first edition was "African Union: What are the Possible Options for Strategic Autonomy?". **80 participants** from **20 countries**, including **16 African** countries, weighed in on the question. In his opening speech, **Mohamed Diane**, Guinea's Defense minister, spoke about the hindrances, citing tensions among populations, insufficient means, the continent's leadership crisis and its isolationism. He proposed possible ways forward, highlighting the need to explore "new forms of sovereignty that ensure collective security in the face of common threats" of terrorism, famine, climate and health.

Amara Essy, former Secretary General of the Organisation of African Unity (OAU) and former Minister of Foreign Affairs of Côte d'Ivoire, emphasized that populations should be involved in creating a collective sense of security. **Hubert Védrine**, former French Minister of Foreign Affairs and **Paulo Portas**, former

Minister of Defense and Deputy Prime Minister of Portugal, placed African issues back into their wider international context - a constantly shifting one, with its uncertainties and rapid shifts in the digital era. Among other distinguished guests were **Vice Admiral Michael Franken**, who served as the U.S. Africa Command (AFRICOM) Deputy to the Commander for military operations, and **Sir John Scarlett**, Vice Chairman of the Royal United Services Institute (RUSI) and former Chief of the British Secret Intelligence Service (MI6). Researchers in attendance included **Greg Mills**, director of Brenthurst Foundation in Johannesburg and **Bronwyn Burton**, deputy director of the Atlantic Council in the United States.

There were four conversations with political figures, and five plenary sessions. Debates addressed the AU's need for financial independence and the implementation of the reform proposed by the Rwandan president, **Paul Kagame**, to levy a 0.2% tax on member states' imports. Another discussion focused on how imperative it is for the AU to define its own military doctrine, to involve populations, to contemplate a new form of sovereignty and to adopt a holistic approach to collective security.



1. **Vice-Amiral Michael Franken**, Deputy to the Commander for Military Operations (AFRICOM)
 2. **Andrew Hamman**, US Embassy Defense Attaché to Morocco
 3. **Essy Amara**, former Secretary General of the OAU and former Minister of Foreign Affairs of Côte d'Ivoire
 4. **Sir John Scarlett**, Vice Chairman of the Royal United Services Institute (RUSI) and former Chief of the British Secret Intelligence Service (MI6) 2004-2006
 5. **Mohamed Loulichki**, Senior Fellow, OCP Policy Center

6. **Rachid El Houdaigui**, Senior Fellow, OCP Policy Center
 7. **Paulo Portas**, Former Deputy Prime Minister – Portugal
 8. **Greg Mills**, Director of Brenthurst Foundation, Johannesburg
 9. **Air Vice Marshal Griffiths Santrofi Evans**, Commandant of the Kofi Annan International Peacekeeping Training Centre (KAIPTC)
 10. **Lieutenant General Aliyu Mohammed Gusau**, Former Minister of Defense, Nigeria



Strategic Dialogues in Ethiopia

"Growth Strategies and Industrial Policies: Towards Structural Transformation in Africa"

February 2017 - Addis Ababa, Ethiopia



The Ethiopian Development Research Institute (EDRI) and OCP Policy Center co-hosted the first edition of Strategic Dialogues, a platform for economic policy dialogue, on February 8 and 9, 2017 in Addis Ababa. The theme was "Growth Strategies and Industrial Policies: Towards Structural Transformation in Africa."

The conference began with a round table debate, followed by a seminar with four panels and two in-focus sessions with speakers from Ethiopia and Morocco who discussed major common challenges.

There was talk of admitting the existence of obstacles, targeting initiatives, appropriate policy responses to changing threats, rapid changes in market structures, and even uncoordinated trade policies. Panelists included **Ahmed Abitew**, Ethiopian

Minister of Industry, **Neway Gebre-Ab**, former Chief Economic Adviser to the Prime Minister and Executive Director of EDRI, as well as **Fathallah Oualalou**, Senior Fellow at OCP Policy Center. They tackled the issue of potential results and impact on international development and support expected from multilateral development.

Economists, including **Yohannes Ayalew**, Vice-Governor and Chief Economist at the National Bank of Ethiopia, argued that Africa cannot undergo structural transformation, shifting from low productivity levels to high productivity levels, without developing its infrastructure. Yet given market failures and lack of coordination, this can only occur if governments deliberately intervene.

Speakers including **Araya Girmay** (Director General of the Ethiopian Roads

Authority) discussed the role of Public-Private Partnerships (PPPs) in Africa, the key challenges for PPPs, the importance of including local communities and their contribution to the country's growth, as well as the role of foreign players who transfer their expertise and their skills.

The panel chaired by **Assed Ziyad** (Minister of State, Minister of Commerce, Ethiopia) investigated why Africa is absent from global value chains. Reasons ranged from inadequate institutional frameworks to a lack of commitment and leadership. The panel discussed opportunities for Sub-Saharan Africa to rethink its position in global value chains. Lastly, industrial migration, in particular from Asia, could be an opportunity for African countries with a favorable investment climate to rapidly upgrade their production systems.

6th Edition

ATLANTIC DIALOGUES 2017

Africa in the Atlantic: Time for Action

December 2017 - Marrakesh



“**Africa in the Atlantic, Time for Action**”: under this theme, the 6th edition of the Atlantic Dialogues addressed in Marrakech, on December 11-13th 2017, the major geopolitical and economic challenges of the Southern Atlantic Basin.

The high-level conference, organized by OCP Policy Center under the High Patronage of His Majesty the King Mohammed VI, is attended each year by **50 young emerging leaders** and **340 participants** from **70 countries**. It has become a global meeting point since its launch in 2012 by OCP Policy Center and the German Marshall Fund of the United States (GMF), an American think tank based in Washington.

In order to ensure a balanced exchange, political figures, public officials, researchers and economic decision-makers have come from the entire African coastline – from South Africa to Morocco through Nigeria – but also from the Americas and Europe. Most participants in 2017 came from **Africa (30% from Sub-Saharan Africa and 19% from Morocco)**, **21% from Europe**, **18% from North America** and **9% from Latin America**. Representatives of international institutions represented **21% of the guests**, **the private sector 15%**, **think tanks 23%**, **academia 14%** and **the media 7%**.



Aminata Touré, Former Prime Minister of Senegal



Rabi H. Mohtar, Senior Fellow, OCP Policy Center



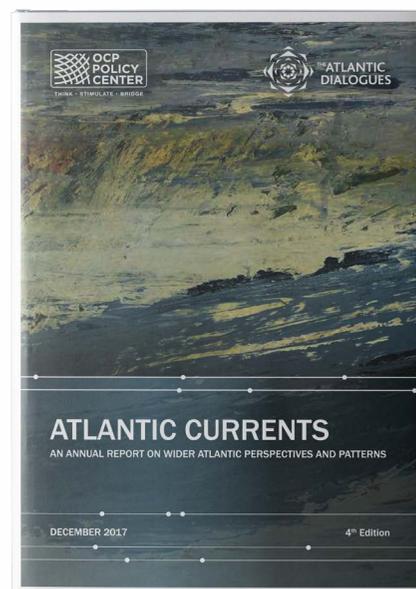
“Africa has hardly started to think of its maritime geopolitics and geoeconomics”



Rachid El Houdaigui, Professor of International Relations at Abdelmalek Essaadi University (Tangier) and Senior Fellow at OCP Policy Center, at the opening of Atlantic Dialogues 2017.

Although the South Atlantic has not been very much present in the dominant perceptions, due to the linguistic areas inherited from the colonial era and the geopolitical organization established in the twentieth century, OCP Policy Center is deeply convinced of its importance for Africa’s future. Far from being isolated from the rest of the world, this vast continent must highlight its long history of exchange with Europe and the Americas, for the sake of its own interest.

Over the past six years, OCP Policy Center has demonstrated a strong interest in major Atlantic issues, through international events such as the Atlantic Strategy Groups in Brazil and Senegal. Many Atlantic-related papers and books have also been published, including the annual report [Atlantic Currents](#), an extension of the analytic contribution provided by the Atlantic Dialogues.



ATLANTIC CURRENTS

Annual Report

This yearly report published by OCP Policy Center sheds new light on challenges facing the Atlantic, by voicing the views of the South on the international stage. Drafted by OCP Policy Center's associate researchers, the report supports and extends the ideas discussed during the Atlantic Dialogues.

Previous editions have focused on the North Atlantic dominant Brussels-Washington axis (2014) and the need to change "mental maps," to make sure South-South relations and Africa are included in global perceptions of the Atlantic (2015). It dwelled on the "green energy revolution" in Africa, Europe's new

global strategy, finance in Latin America and Africa, as well as the role of religion in international relations (2016). Six themes were discussed in the 2017 edition, which are (1) The Africa-Latin America Partnership: Between Sentimentalism and Realism; (2) African Migration: A Cause for Panic?; (3) Facing the New generation of Terrorism and the Opportunities for a Common Continental Responses Capabilities; (4) Towards Africa's Ownership of its Maritime Reality and Potential; (5) The Quest for Regional Integration in Africa: Approach by Macroeconomic and Real Convergence Concepts; and (6) Selected Indicators for Integration Process Assessment within the Atlantic Space.



1. **El Mostafa Rezrazi**, Senior Fellow, OCP Policy Center / 2. **Yassine Msadfa**, Research Assistant, OCP Policy Center / 3. **Rachid El Houdaigui**, Senior Fellow, OCP Policy Center / 4. **Abdelhak Bassou**, Senior Fellow, OCP Policy Center / 5. **Tayeb Ghazi**, Economist, OCP Policy Center

Owning the Narrative

The first session, called “Africa tells its own narrative”, went beyond a simple statement or a manifesto. It has set the basis for a strong commitment and a source of proposals, in line with OCP Policy Center’s action and multiple publications, and its very *raison d’être*.



“The narrative on Africa still doesn’t come from the continent but elsewhere,” stated **Njoya Tikum** (Cameroon), regional anti-corruption and economic governance policy advisor for the United Nations Development Programme (UNDP) in Addis Abeba, adding that **“When The Economist issued a cover on ‘Africa, the hopeless continent’, it took us ten years to get out of that perception. Now, we are ‘rising’ (...)** [But] How can we be rising if the Democratic Republic of Congo (DRC) cannot make its own telephones with all its coltan? Or if the Ivory Coast produces 99 % of the world’s cocoa but doesn’t get anything out of it, leaving the profits of chocolate to Germany ?”

Oby Ezekwesili (Nigeria), co-founder of Transparency International and Senior Advisor for Africa Economic Development & Policy Initiative, agreed with Njoya, asserting that **“We cannot yet afford to be triumphalist about the performance of the last decade. Africa has had growth, but did not make the transition from a commodity-based economy to manufacturing and services. That is where the challenge lies. It’s not all doom for us. If we can fix our politics, we will move fast.”**



Reflecting on the “maturation process” of African democracies, she stated without complacency that **“sooner or later, the politics will no longer be determined by a club of parasite elite who act like a criminal gang on our continent, but by citizens!”**

Rwanda and Ethiopia, two African exceptions?

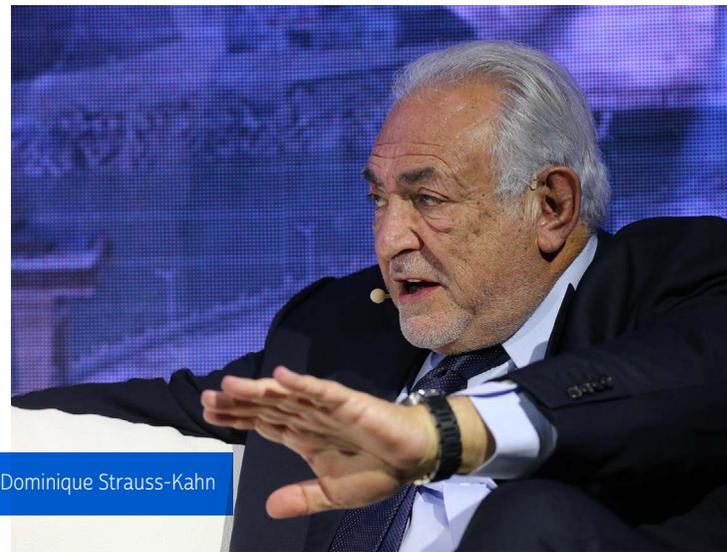
Alan Kasujja, famous presenter from BBC Newsday, mentioned without naming them **“two countries who are doing best in Africa but are bashed by the West”** and asked this provocative question: **“Does Africa understand its own political solutions?”** **Njoya Tikum** replied that **“countries like Rwanda and Ethiopia did not base their plans on what Japan or France think. They have their vision and their own narrative. But overall, in Africa, we still have this feeling that our confidence and our energy have to be tied in one way or another to our external influences.”**

With Plenary Sessions on “The State of the World Economy and its Implications for Development” and “Exploiting the Economic Potential of Africa and its Global Links,” the same reflections on the key issue of governance were formulated. Former IMF Director and French economist **Dominique Strauss-Kahn** has drawn uncertain perspectives in the long term because of the **“rising inequalities between and within countries, low wages, lowering labour productivity and finance (linked to the Latin American debt and the Chinese financial excesses).”**

Alan Kasujja



Dominique Strauss-Kahn



MIGRATION

African Migration: a story that needs to be told differently

The facts contradict dominant perceptions about African migration, which is portrayed as a scourge. What are the nature, causes and consequences of these flows? A cold examination of the figures shows that 80% of African migration happens within the continent. It amounts to merely 10 % of the global migration in the world. Moreover, only 12 % of African migrants head for Europe, 6 % for Asia and North Africa, and 2 % elsewhere in the world. This is also the case for West Africa, the region where most of the African migrants come from. **A massive share of 70 % of migrants born in West Africa do not leave Africa. Only 15 % of them go to Europe, while 15 % prefer the USA and other destinations in the world.** Five major host countries, and economic powerhouses, attract a large portion of migrants, which are: South Africa, Côte d'Ivoire, Nigeria, Kenya and Ethiopia. Only marginally focused on Europe, African migration also constitutes an opportunity, given the need for workforce in European countries, where the demographics are declining.



After an observation on the legacy left by slavery and colonization on Africa, **Laoye Jaiyeola**, CEO of the Nigerian Economic Summit Group, sharply replied: **“Africa is responsible for its problems! Political leadership is something we need to revisit without talking about A, B or C. I won’t need to go to England if the health, school and business environment is good in my country! Our problem is that there is no inclusion, people are hungry and poor, small farmers need agricultural systems to process their production and stop the harvest losses (40 % in Nigeria) because there’s no infrastructures giving them access to the markets. We just need to start processing our raw materials! With the right leadership, in 10 years from now, we could solve the problems in Africa!”**

This frank conversation, a sign of changing times, went on during two Plenary Sessions on “Agricultural Policy in Africa and Technological Change,” and “Bridging Africa’s Financing Gap: New Actors, Longstanding Challenges.”



Laoye Jaiyeola

During a Plenary Session on “Exploiting the Economic Potential of Africa and its Global Links,” The Nigerian co-founder of Transparency International, former Vice-President of the World Bank, and Senior Advisor for Africa Economic Development & Policy Initiative reacted boldly to a statement coming from the floor on the legacy left by centuries of colonization and slave trade. Far from the traditional posture of lamentation adopted for decades by the Francophone zone in Africa, she replied to **Laoye Jaiyeola**:

“I won’t waste my time discussing what was done to us, but what we are doing to ourselves. That’s a major point of interest for me! If we are to talk about unlocking Africa’s potential, we need some forward thinking. Africa’s economic performance improves on the tail of the ICT revolution ! Africa was not part of the agrarian revolution nor the industrial revolution, but takes part in the ICT revolution with a billion of phone lines and the way it consumes ICT. What if Africa starts to participate fully in the ICT innovation – to get out of the mess of its political failure, because if you cross the Mediterranean Sea you are still considering the risks of dying as lower than staying on the continent... How do we get governance to be effective enough and optimize the factors ?”

Security in the Sahel

This sensitive topic was brought up in an open conversation between all the participants in the plenary, starting with **Youssef Amrani**, former Moroccan minister of Foreign Affairs and Head of Mission at the King of Morocco's Cabinet. **"In the case of Mali, without French intervention, Bamako would have fell,"** he affirmed, **"We've said yes in the past because Morocco was part of the Security Council. But we won't go forward without creating stronger states. The G5 Sahel is important because it reinforces security and regional integration. Unfortunately, the Maghreb doesn't work. With a good and coherent structure, we could have contributed to the resolution of the Libyan conflict. We need a stronger vision. The horrible ones have a vision. Al Qaeda and ISIS have a vision in the Muslim world, from the Gulf all the way south."**

On his part, retired General, **Nick Parker**, and Senior Fellow at the Royal United Services Institute (RUSI) in London, who was in command during the British invasion of Sierra Leone in 2002, seemed skeptical regarding the G5 Sahel's capacity. The G5 Sahel, created in 2014, is composed of five countries (Mali, Niger, Burkina Faso, Chad & Mauritania). The original goal for the G5 Sahel was to have 5,000 troops deployed by July, with varied and numerous forms of support. They benefited from financial support from the EU (\$50 million), the US (\$60 million), Saudi Arabia (\$100 million), and the UAE (\$30 million), but were only able to deploy 1,000 men by the end of 2017. Parker asked **"Who's in command?"** adding that **"there must be greater clarity in regards to the structure of command if we want to succeed in the physical aspect of the terrain. How can we help the forces of the region achieve this objective? The challenges we discussed require leadership. Who will rise in the region to take on this leadership? I do not hear a lot about Nigeria. Power is required, that is true, but also leadership for a successful and concentrated intervention."**

Lessons Learnt from Military Interventions in Africa

Abdelhak Bassou, Senior Fellow at OCP Policy Center, summarized foreign interventions as such: **"A one-off action from a foreign power in an urgent situation is accepted. When it lasts, however, it's not [acceptable]. The civilians that develop and democratize, can they immediately replace the military?"** Michelle Ndiaye, Head of the Tana Forum Secretariat, defended the UN mandates, all while highlighting the ambivalence of the African Union (AU) in its military interventions in the continent, stating, **"the AU has shifted its position from the principal of non-interference to non-indifference,"** also reminding the audience that **"military interventions originating from Africa are better accepted."**

Alessandro Minuto-Rizzo, former Deputy Secretary General of NATO from 2001 to 2007, argued, for his part, that **"[the] success of foreign external interventions isn't guaranteed in Africa. It is in fact the opposite, and it's very uncertain as was shown in Operation Restore Hope in 1992 in Somalia. The French Operation in Serval was very useful to Mali in 2013, but two years later, Al Qaeda was still present in different areas of the country. The problem resides in the fact that military intervention means the occupation of territory to resolve a problem. Thus, it's as if we're solving problems created by people, but in a colonial succession."**

Development in Africa: Perspectives from former Latin American Presidents

A debate took place on South-South cooperation, with the participation of **Lionel Zinsou**, former Prime Minister of Benin, who invited the attendees and participants to **"look at the geography of Africa through new lenses, and view the whole area from Lagos to Abidjan as 'one country' more interesting than all of Nigeria."**

A closing session, following this, permitted three former Heads of States to deliver their analyses on Africa, its trajectory, its development and its relations with Latin America. **Miguel Angel Rodriguez Echeverria**, former President of Costa-Rica, argued that **"trust is crucial,"** when it comes the political decisions and government, adding that: **"Without the trust of electors, it is difficult to formulate policies that are susceptible to transforming the economy. The election of Donald Trump and Brexit are signs of the loss of trust in the established parties and political figures [...]. In the common points between Latin America and Africa, there's the need for shared legal security.**

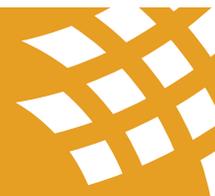
We need to have trust in the implementation of laws, opening markets to attract high-level competencies and necessary skills of productive economies, and to apply fiscal policies which can reduce financial risks."

Federico Ramon Puerta, former president of Argentina and Ambassador of Argentina to Spain, brought up tourism as a **"permanent dimension of growth,"** to exploit in both Latin America and Africa. **"The links and connections between Africa and Latin America will come with the economy's success and talents of entrepreneurs from both continents."** **Eduardo Duhalde**, former president of Argentina, on his part, reminded the audience that **"Certain countries in Africa have vast oil reserves that are unexploited. Cooperation between African countries and Latin America is possible (...) but we have severe shortcomings in terms of connectivity of means of transport. We cannot allow ourselves to not have one direct flight from Africa to Latin America!"**



1. Miguel Ángel Rodríguez Echeverría, Former President, Costa Rica. / 2. Lourival Sant'Anna, Journalist, CBN / Estadão / Exame.
3. Eduardo Duhalde, Former President, Argentina. / 4. Federico Ramon Puerta, Former President, Argentina.

Our **major**
events



EU - Africa Strategic Dialogue

Scrutinizing tendencies and decrypting situations

April 2017 - Rabat



In partnership with the European Union Institute for Security Studies, and a cooperation with Compagnia di San Paolo, OCP Policy Center successfully hosted the EU-Africa Strategic Dialogue in Rabat, Morocco. The event is an international conference under the context of the “**African Futures**” project. The objective behind this event is to investigate likely African trends and situations in the long term, defined in this context as 10 to 15 years, and their possible effects on Europe. A total of **30 countries**, **40 international institutions**, and **40 Moroccan organizations** were present in the event. Additionally, **80 experts** from both continents shared, during the conference, their separate perspectives on a vast selection of issues of common interest between the two continents.

Different topics in the panels were discussed, starting with the Economic Development Prospects, followed by, the Future of Populations and Cities, the Fight Against Terrorism and Transnational Crimes, Africa’s Powers, to finally end up with Policy Panel in which policymakers and experts built on the insights and conclusions drawn in previous panels to assess the possible future scenarios for the next 10 to 15 years. The goal behind such big events is to improve policy-oriented discussions between Africa and Europe. Morocco, being a country that shows great interest in foreign policy and foreign affairs, is aiming to consolidate the bridge between the two continents so that it is reflected on the country and the African continent as a whole.



Antonio Missiroli, Director, European Union Institute for Security Studies (EUISS)

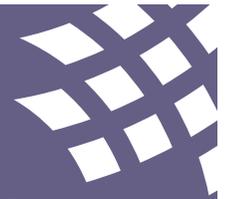


Jalal Abdel-Latif, Senior Fellow, OCP Policy Center



1. Youssef Amrani, Head of Missions, Royal Cabinet . / **2. Karim El Aynaoui**, Managing Director, OCP Policy Center.

Antonio Missiroli, Director, European Union Institute of Security Studies (EUISS) / **4. Kidane Kiros**, Director, *Institute for Peace & Security Studies* (IPSS).



An Economic Debate Focused on the World Bank's new Middle East and North Africa Economic Monitor

“Regional Prospects and the Economics of Post-Conflict Reconstruction”

April 2017 - Rabat





In partnership with The World Bank, OCP Policy Center launched on April 17th the latest edition of the MENA Economic Monitor in Rabat, Morocco. The report shows the short-term, macroeconomic viewpoint and monetary difficulties confronting nations in the MENA region. The most recent version of the report, likewise, has a section on the financial aspects of post-conflict reproduction. Going hand in hand with delivering an evaluation of the monetary expenses of the conflicts that happened in Libya, Syria, and Yemen, the report suggests strategies for reconstruction to build and merge stability.

The conference consisted of two major panels, which were livestreamed in and even broadcasted on France 24 on April 21.

The first panel, “6 years after the Arab Spring: The Economic Situation in MENA and the Prospects for Growth and Reform,” showed that the economies of the MENA regions were all, either directly or indirectly, impacted by many factors related to the Arab Spring during the last 6 years.

Moving on to the second panel, which was called “The Economics of Post-Conflict Reconstruction in the Region: Towards a New Social Contract” the principles of reconstruction, and how any potential effort should address the causes of conflict as well as rebuilding critical infrastructure were discussed. One of the common causes of all three of the regional civil wars is the loss of trust between citizens and their government. All in all, the second panel mainly focused on ways to restore that trust and renew the social contract between citizens and their government.



1. **Marie Françoise Marie-Nelly**, World Bank - Director of MENA Department / 2. **Massa Mufti-Hamwi**, Co-founder and President of Sonbola group for education and development / 3. **Fathallah Oualalou**, Senior Fellow, OCP Policy Center / 4. **Abdallah Saaf**, Senior Fellow, OCP Policy Center

Seminar on Economic Growth in Morocco: Theories, Evidence and Lessons Learnt from Recent Experiences

May 2017 - Rabat



The High Commissioner for Planning (HCP) organized in partnership with OCP Policy Center, on Thursday, May 18th at the premises of the HCP, a conference on economic growth in Morocco. This meeting brought up various issues about development in Morocco in a setting where the Moroccan economy has recently recorded, **during the 2000s-decade, a genuinely relentless development with a rate of 5%, against almost 3% during the previous decade.** This progress was complemented by a decreased dependence of the national economy on agricultural production and eventually, climatic perils.

Although the effect of the 2008-2009 financial crisis was not immediate, it has likely negatively affected the nation's supply limit in the presence of signs of a slowdown in trend output and the limits of the growth strategy concentrated on the expansion of domestic demand, driven by a high rate of public investment and a managed wage growth. This conference was, therefore, a chance to provide some answers to the questions on the issue of growth. Accordingly, there were multiple questions answered during the conference regarding different subjects comparable to the efficiency of public investments, the relationship between the labor market, competitiveness and economic growth, and even the integration with sub-Saharan Africa as a new growth driver.



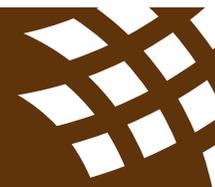
Abdelhak Allalat, Interim Secretary General, High Commissioner for Planning



1. Idriss El Abbassi, Professor-Researcher in Economics at Mohammed V University, Rabat
2. Aomar Ibourk, Senior Fellow, OCP Policy Center.

Said Tounsi, Professor-Researcher in Economics at Mohammed V University, Rabat





Presentation of the Report **ARCADIA on Commodity Analytics and Dynamics in Africa**

June 2017 - Paris, France





After a successful first edition of the Report on **Commodity Analytics and Dynamics in Africa**, OCP Policy Center and the Cercle CycloPe produced and launched the second edition of the report on June 20th 2017 in Paris, France. This report was coordinated under the supervision of **Yves Jégourel**, Senior Fellow at OCP Policy Center, and **Philippe Chalmin**, Founder and President of Cercle Cyclope, and aims to offer an increasingly coherent vision of African realities in the world of commodities. After introducing our 2016 report in Rabat, Dakar, and Abidjan, OCP Policy Center chose to launch its second edition in Paris, and the event saw the presence of over **50 participants** including authors of the report, journalists, commodity experts, and our experts Karim El Aynaoui, Abdelhak Bassou, and Francis Perrin.

It is no secret that the African continent is rich in natural resources, ranging from minerals, metals, to fossil fuels. The first part of this report provides chapters on essential issues such as the reform of mining codes and conventions in Africa, the geopolitical impact of commodities, renewable and non-renewable energies in the economic development of the continent in addition to food security in Africa.

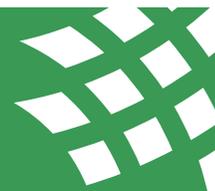
The second part of this report is devoted to analyzing the evolution of different commodity markets which, although global, are of economic importance to one or more producing countries in Africa. This includes chapters on oil, natural gas, copper, iron ore, bauxite, coking coal, tropical timber, diamonds, cocoa, coffee, cotton, rice and steam coal. Compared to the 2016 edition, OCP Policy Center and Cercle Cyclope redesigned the report to offer an exclusively African perspective on products traded worldwide.

As the African continent lies at the heart of OCP Policy Center's activities and as Commodity Economics and Finance represents one of the major research pillars of OCP Policy Center, the ARCADIA biennial report fits within our think tank's vision for a better understanding of the challenges and opportunities linked to Africa's transformation.



1. **Francis Perrin**, Senior Fellow, OCP Policy Center / 2. **Bénédicte Chatel**, Associated Director, Commod Africa / 3. **Philippe Chalmin**, Founder, Cyclope & Professor, Paris-Dauphine University / 4. **Abdelhak Bassou**, Senior Fellow, OCP Policy Center / 5. **Yves Jégourel**, Senior Fellow, OCP Policy Center

Our **major**
events



Seminar: Social Cohesion, Institutions and Public Policies

June 2017 - Rabat





On July 2017, OCP Policy Center published a collectively written book entitled “**Social Cohesion, Institutions and Public Policies,**” directed by Professor **Abdallah Saaf**, Senior Fellow at OCP Policy Center. This publication is the result of reflections and discussions exchanged during a conference organized on Thursday, October 27, 2016, and insights from the conference were transposed into written contributions. The book was presented at the National Library of the Kingdom of Morocco (*Bibliothèque nationale du Royaume du Maroc - BNRM*) on June 30th 2017.

The notion of **social cohesion** is treated through an angle that not only looks at the historical foundations of Morocco, but also by questioning the role of citizen participation in the matter.



1. Mustapha El Mnasfi, Faculty Member & Professor, Mundiapolis University, Casablanca / **2. Meryeme El Anbar**, Researcher, Faculty of Economic & Social Sciences, Agdal, Rabat / **4. Mohammed Haddy**, Political Scientist & University Professor, National Institute of Planning and Development, Rabat / **5. Abdelkrim Azenfar**, Director, Office of Cooperation & Development / **6. Hamid Ait Lemqeddem**, Professor-Researcher & Faculty Member, National School of Commerce and Management / **7. Bouchra Sidi Hida**, Researcher, Center for Studies and Research in Social Sciences

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AGRICULTURE, ENVIRONMENT AND FOOD SECURITY

Title	Type
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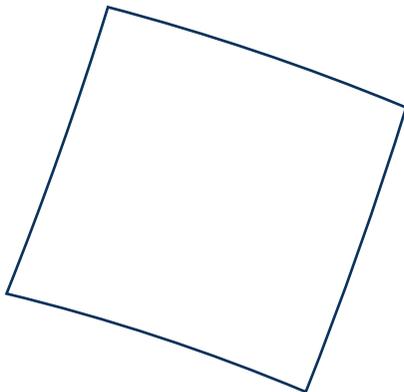
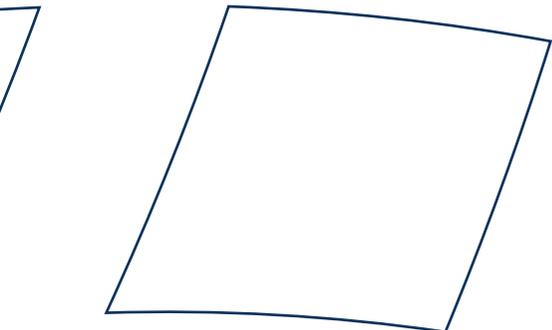
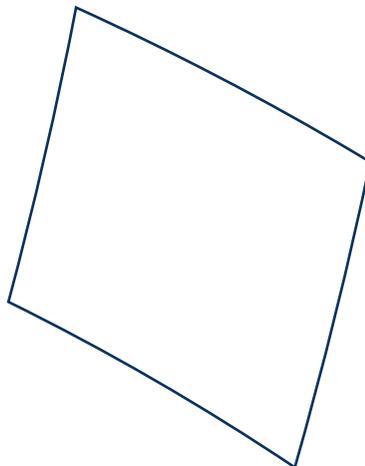
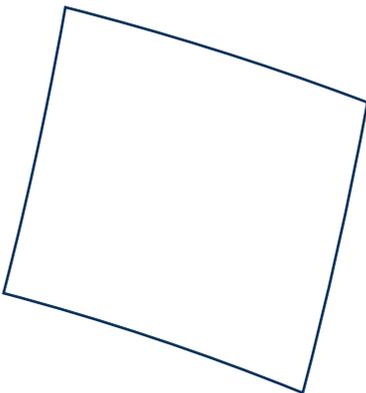
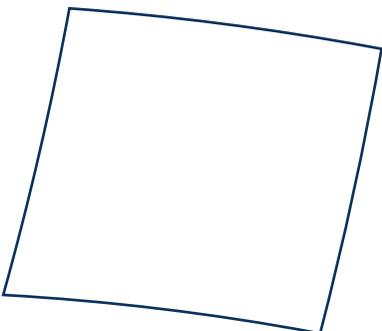
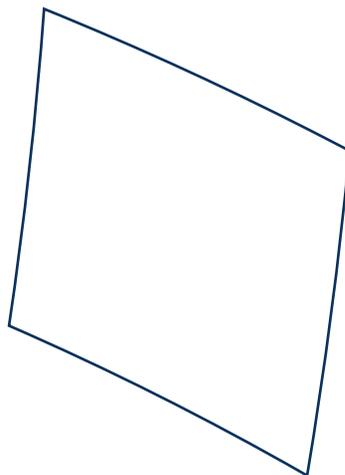
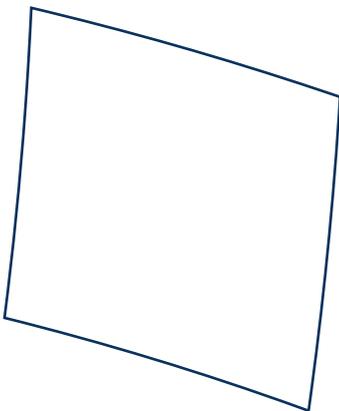
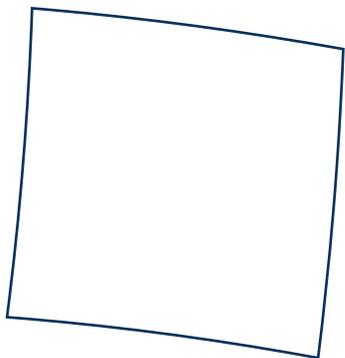
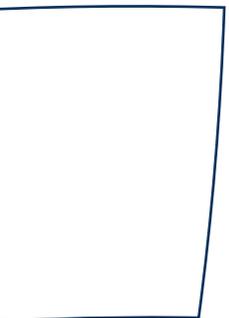
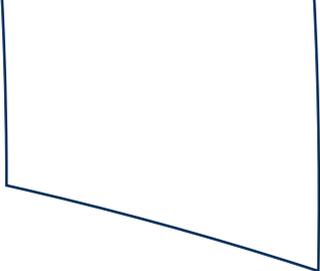


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