

LABOUR MARKETS IN NORTH AFRICA

structural challenges, the impact of coronavirus disease (COVID-19), and a roadmap for the post-COVID-19 period



Labour markets in North Africa:

structural challenges, the impact of coronavirus disease (COVID-19), and a roadmap for the post-COVID-19 period

Ordering information:

To order copies of this report, please contact: Labour markets in North Africa: structural challenges, the impact of coronavirus disease (COVID-19), and a roadmap for the post-COVID-19 period, Publications Section

Economic Commission for Africa P.O. Box 3001 Addis Ababa, Ethiopia

Tel: +251 11 544-9900 Fax: +251 11 551-4416 E-mail: eca-info@un.org Web: www.uneca.org

© 2021 United Nations Economic Commission for Africa Addis Ababa, Ethiopia All rights reserved First printing September 2021

Material in this publication may be freely quoted or reprinted. Acknowledgement is requested, together with a copy of the publication.

The designations used and the presentation of material in this publication do not imply the expression of any opinion whatsoever on the part of the United Nations Economic Commission for Africa (ECA) concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries, or its economic system or degree of development. Designations such as "developed", "industrialized" and "developing" are intended for statistical convenience and do not necessarily express a judgment about the stage reached by a particular country or area in the development process.

Cover design, layout and printing: ECA Printing and Publishing Unit. ISO 14001-2015 certified.

Table of Contents

| Ack | (nowledgements | vii |
|------|---|--|
| Sun | nmary | . viii |
| Bac | kground | . xiv |
| Intr | oduction | 1 |
| I. | The labour market in North Africa: key trends and major challenges 1. The labour supply in North Africa A. Demographic trends that result in an ever-increasing number of job seekers B. Challenges related to quality of supply, despite improvements in qualifications 2. Labour demand in North Africa A. Insufficient numbers of jobs, many of which are of low quality. B. Sectoral changes are taking place slowly but are enhancing productivity growth 3. Challenges impeding the smooth operation of labour markets in North Africa 4. Key imbalances: unemployment, discouragement/inactivity, and the emergence of the "neither-nor" generation. A. Persistent high unemployment versus low job content growth B. A decline in labour force participation that primarily affects young people and women. C. A high proportion of young people are neither in employment nor in education or training. | 2 4 5 7 11 13 13 |
| II. | The labour market in North Africa in the context of COVID-19 1. Closure resulting in quarantining of factors of production 2. Impact on demand: production and operation of firms A. A preliminary analysis of the sectoral impact of the pandemic B. Impact on business operations C. A disproportionate impact on sectoral employment D. Impact of the COVID-19 pandemic on the labour market in North Africa E. The prospect of heightened poverty levels Table 13: Selected indicators of employment categories in North Africa, 2019 3. Growth and labour market prospects A. Growth prospects to the year 2022 B. Labour-market prospects to the year 2022 Figure 46: Expected impact on revenue in 2020 | 19 20 21 28 33 42 43 46 46 47 |
| III. | A roadmap for the post-COVID-19 period in North Africa | 50 50 61 67 :he |

| References | 77 |
|--|---------------------------------------|
| Annexes | 79 |
| Annex 1: Youth demographic explosion in North African countries | |
| Annex 2: Sectoral distribution of jobs in North African countries | |
| Annex 3: Key COVID-19 mitigation policies adopted in North Africa | |
| A. Algeria: context and main policy responses | |
| B. Egypt: context and main policy responses | |
| C. Mauritania: context and main policy responses | 82 |
| D.Morocco: context and main policy responses | 83 |
| E. The Sudan: context and main policy responses | 84 |
| F. Tunisia: context and main policy responses | 85 |
| List of Figures | |
| | |
| Figure 1: Demographics are fuelling an increase in the numbers of individuemployment: demographic pressures are putting employment characteristics | allenges front and |
| Figure 2: Employment rates (percentage of the population aged 15 and ov North African countries, with comparable figures for Arab World income and middle income countries | ver in employment), , lower-middle |
| Figure 3: Apparent labour productivity in selected North African countries (logarithmic scale) | , 1996-2019 |
| Figure 4: Sectoral distribution of jobs and value added in North African co | |
| Figure 5: Labour market efficiency in North African countries: efficiency in 10 | |
| Figure 6: National, women's and youth unemployment rates for countries and corresponding rates for Arab States and for lower-middle an countries (per cent), 2001 and 2019 | d middle income |
| Figure 7: Unemployment rates by level of education completed (per cent) | |
| Figure 8: National and women's labour force participation rates, North Afr | |
| States and lower-middle and middle income countries (per cent) | |
| Figure 9: Youth labour force participation rate, North African countries (pe | |
| Figure 10: Proportion of young people nationally and young women in No | |
| countries who are neither in education nor in employment or tra | |
| Figure 11: COVID-19: an unprecedented economic shock | |
| Figure 12 : Value added breakdown by sector, 2019 | |
| Figure 13: Breakdown of the sample by sector | |
| Figure 14: Impact on the operations of the Algerian business sector | |
| Figure 15: Impact on the activities of Algerian businesses | |
| (proportion of businesses affected) | 23 |
| Figure 16: Sample features | 24 |
| Figure 17: Operational status of Algerian small and medium-sized enterpri | ses |
| (mid-May 2020) | 24 |
| Figure 18: Reason for changing jobs or discontinuing employment | |
| Figure 19: Share of firms that discontinued operations, by sector | |
| Figure 20: Operational status of Tunisian businesses as of 30 June 2020 | 28 |
| Figure 21: Direct and indirect employment in the tourism sector in selecte | d North African |
| countries as a percentage of total employment | 30 |

| Figure 22: Net job losses between the second quarter of 2019 and the second quarter | |
|--|----|
| 2020 by place of residence (urban/rural) | |
| Figure 23: Variation of the total working hours between the second quarter of 2019 and | |
| of 2020 by sector of economic activity (in millions of hours) | |
| Figure 24: Share, by sector, of firms that had reduced their workforce | |
| Figure 25: Distribution of the workforce by sector, second quarter of 2020 | |
| Figure 26: Proportion of workers whose conditions in the labour market had changed si | |
| the beginning of the pandemic | |
| Figure 27:Distribution according to the status change in the labour market | |
| Figure 28: COVID-19 related motivations for work stoppages (per cent) | 37 |
| Figure 29: Income variation of household members since the start of COVID-19 pander (per cent) | |
| Figure 30: Share of workforce reductions by businesses in various sectors | |
| Figure 31: Net job losses between the second quarter of 2019 and the second quarter | of |
| 2020, by residential area | |
| Figure 32: Variation of the volume of labour input per week between the second quarte | |
| 2019 and the second quarter of 2020 by sector of economic activity (in million hours) | |
| Figure 33: Profile of the rate of underemployment between the second quarter of 2019 | |
| the second quarter of 2020 among certain categories of the active workforce | |
| cent) | • |
| | 37 |
| Figure 34: Profile of unemployment rates between Q2, 2019 and Q2, 2020, for certain | 40 |
| categories of the population (per cent) | |
| Figure 35: Profile of those unemployed by cause of unemployment status, between Q2 | |
| 2019 and Q2 of 2020 (per cent) | |
| Figure 36: Breakdown of the youth workforce by status, 2019 | |
| Figure 37: Overrepresentation of women in education and health | |
| Figure 38: Breakdown of the workforce, 2019 | |
| Figure 39: Breakdown of working population, by income bracket, 2019 | |
| Figure 40: Insurance mechanisms against unemployment, by category of regime, 2015 c | |
| latest available data | |
| Figure 41: Regional distribution of the newly impoverished as a result of COVID-19 | |
| Figure 42: Distribution of GDP by main areas of expenditure, 2019 | |
| Figure 43: Gross domestic product, at constant prices (rate of growth) | |
| Figure 44: Losses in working hours in Q1 and Q2, across the continent | |
| Figure 45: Expected impact on revenue, first month of the crisis | |
| Figure 47: Financial status and risk of permanent closure | |
| Figure 48: Impact on the capacity of businesses to cover fixed costs | |
| Figure 49: Business survival prospects during the crisis | |
| Figure 50: Impact on revenue and costs, first month of the crisis | 52 |
| Figure 51: Impact on revenue and costs in various business sectors, first | |
| month of the crisis | |
| Figure 52: Expected impact on revenue and costs, 2020 | 53 |
| Figure 53: Impact on revenue at the end of March and at the end of May 2020 by | |
| economic sector | 54 |
| Figure 54: Impact on revenues – forecasts for the remainder of 2020 | 54 |
| Figure 55: Impact on business revenue in April 2020 and April 2019 | |
| Figure 56: Changes in revenue (percentage of business enterprises) | |
| Figure 57: Support required by businesses enterprises | |
| Figure 58: Support required by businesses enterprises | |
| (percentage of companies responding) | 57 |

| Figure 59: Assistance needed to build resilience and facilitate business development | 5 0 |
|---|------------|
| (percentage of companies responding) | |
| Figure 60: Household procurement of basic necessities: impact and causes | |
| Figure 61: Household satisfaction with measures implemented by the Government (pe | er cent) |
| 63 | |
| Figure 62: Decline in business income during the lockdown period (per cent) | |
| Figure 63: Proportion of lost earnings covered by government compensation schemes | |
| cent) | |
| Figure 64: Government budget deficits 2013–2022 (as a percentage of GDP) | |
| Figure 65: Gross public debt (as a percentage of GDP) | |
| Figure 66: Foreign direct investment: annual inflows | |
| Figure 67: Proportion of GDP generated both directly and indirectly by tourism in Nor | |
| African countries | |
| Figure 68: Gross national savings (as a percentage of GDP) | |
| Figure 69: Productivity of, and proportion of jobs provided by key economic sectors in | |
| and Mauritania, 2018 | |
| Figure 70: Productivity of, and proportion of jobs provided by key economic sectors, N | ∕lorocco |
| and the Sudan, 2018 | 71 |
| Figure 71: Productivity of, and proportion of jobs provided by key economic sectors, A | اgeria, |
| 2018 | 72 |
| Figure 72: Productivity of, and proportion of jobs provided by key economic sectors in | |
| Tunisia, 2018 | 72 |
| | |
| List of Tables | |
| LIST OF Tables | |
| Table 1: Literacy rates among adults and young people (per cent, data as of the year in |) |
| brackets) | |
| Table 2: Enrolment in secondary and higher education in North Africa | |
| (per cent, data as of the year in brackets) | 4 |
| Table 3: Human Capital Index for North African countries and learning poverty rates (p | |
| data as of the year in brackets) | |
| Box 1: From the African Statistical Development Index to Statistical Development Indi | |
| 5 | |
| Table 4: Job quality indicators for North African countries (data as of the year in brack | ets)6 |
| Table 5: World Economic Forum indicator on labour market efficiency, 2018 | |
| Table 6: Selected studies on Okun's Law in North Africa | |
| Table 7: Share of firms that resumed operations, by sector (per cent) | |
| Table 7. Chare of fifth and resumed operations, by sector (per certy | ∠/ |

预览已结束, 完整报告链接和二维码如下:

https://www.yunbaogao.cn/report/index/report?reportId=5_31318



