COVID-19 AND EMERGENCE TRAJECTORIES : AFRICAN DATA AND PERSPECTIVES

SUMMARY OF FOURTEEN NATIONAL STUDIES

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Acronyms and abbreviations

AFD	French Development Agency
Africa CDC	Africa Centres for Disease Control and Prevention
ANSD	National Agency for Statistics and Demography
AfDB	African Development Bank
BDEAC	Development Bank of the Central African States
BRICS	Brazil, Russia, India, China and South Africa
ECA	Economic Commission for Africa
ICEA	International Conference on Emergence
DGPPE	Directorate General of Planning and Economic Policies
DSCRP	Growth and Poverty Reduction Strategy Paper
EMSD	Growth and Jobs Strategy Paper
IMF	International Monetary Fund
FDI	foreign direct investment
CGE	Computable General Equilibrium
SDG	Sustainable Development Goals
WHO	World Health Organization
NGO	Non-Governmental Organisations
PAP2A	Adjusted and Accelerated Priority Action Plan 2
GDP	Gross Domestic Product
SME	Small and Medium-sized Enterprises
NSDP	National Strategic Development Plan
UNDP	United Nations Development Programme
PRE	Three-year Economic Recovery Plan
PRES	Economic and social resilience plan
PSE	Emerging Senegal Plan
PSGE	*Emerging Gabon Strategic Plan*
PSIP	Public Sector Investment Program
RDC	Democratic Republic of Congo
SND	National Development Strategy
VSB	Very Small Business
UEMOA	West African Economic and Monetary Union
UNICEF	United Nations Children's Fund
AfCFTA	African Continental Free Trade Area

Executive summary

The fourth edition of the International Conference on the Emergence of Africa (ICEA-IV) entitled **"Seizing the Opportunities of the Covid-19 Pandemic to Accelerate Emergence"** will be held in Abidjan in 2022. Its main objective is to assess the implementation of the various resolutions from ICEA-III, which was held in Dakar in 2019. A secondary objective will be to take a critical look at the impacts of the COVID-19 crisis on the core elements of the emergence plans and trajectories, as well as to explore possible future trajectories for emergence related goals.

In preparation for this conference, UNDP funded the production of case studies in fourteen (14) African countries: *(i) Côte d'Ivoire, Senegal and Nigeria for West Africa; (ii) Morocco and Tunisia for North Africa; (iii) Kenya, Ethiopia and Rwanda for Southern Africa; (iv) Democratic Republic of Congo, Cameroon and Gabon for Central Africa (v) South Africa, Mauritius and Madagascar for Southern Africa.* These studies will serve as as a baseline for the discussions to be held at ICEA-IV and to allow the selected countries to benefit from a critical look at their progress towards emergence. The scope of these reports is mainly *economic* or political-economic, with a particular focus on (i) the state of structural transformation, (ii) the factors accelerating it, and (iii) the macroeconomic framework (including debt and development financing strategies).

After an introduction in which the context is provided, the first part of the paper will focus on the conceptual, analytical and methodological frameworks of emergence in the country. The central question that this part will attempt to answer is **what is emergence and how have countries sought to reach it**? The second part will address the impact of the COVID-19 pandemic. The aim being to answer the question of **where countries stand and what changes COVID has introduced**? Finally, before the overall conclusion of the paper, the third part will explore the various options available to the country.

In its first part, the document recalls that emergence is not a consensual concept, judging by the numerous attempts to define it. Two of these were reported. The first considers emergence from the perspective of international finance and has given rise to the term "emerging market". The defining criteria here is the high attractiveness of markets in which to invest capital abroad, particularly in developing countries (van Agtmael 2007). In the same line of thought, the International Monetary Fund (IMF) refers to capital markets in developing countries that have liberalised their financial systems to promote capital flows and that are widely accessible to foreign investors (IMF, 2006). The second approach is academic.

Here, the focus is on the impact of the emergence phenomenon on the recomposition of international geo-economic and geopolitical balances. In conceptualising the BRICs in 2001, the economist Jim O'Neill anticipated the growth in GDP of Brazil, Russia, India and China, pointing out that the weight of some of the countries in this group was already greater than that of some of the G7 economies at that time (O'Neill 2001). For others, three measurement criteria should be retained: *(i) strong and sustained growth in an economic and social context still marked by great poverty, (ii) relative institutional stability and (iii) a political will that raises apprehensions because the emerging countries are asserting themselves on the international scene at the expense of the traditional powers*[1] . *It* should be emphasised that none of these conceptualisations is, strictly speaking, adapted to Africa, since according to them no African country would meet the criteria for emergence. However, it is possible to identify elements of convergence in the discourses on emergence and the approaches to establishing it, namely that (i) emergence remains underpinned by the idea of economic leaps while implicitly drawing inspiration from the trajectory of Asian developmental states (Routley 2014), (ii) it is anchored on a long-term vision and (iii) common themes are widely shared.

Several African countries have embarked on this path of emergence by developing national development or emergence plans for their economies, which aim to create the conditions for sustainable growth and inclusive development. Prior to the outbreak of the COVID-19 crisis in 2020, most of the countries under review had performed well in terms of economic growth over the period 2010-2019 with economic growth rates on average higher than that of Sub-Saharan Africa. Progress has also been made in reducing poverty and hunger, reducing inequalities and improving access to basic social services (education, health, water and sanitation, etc.). However, certain challenges remain, particularly in terms of access to decent employment in certain countries.

The coronavirus disease first appeared in Wuhan, China, on 31 December 2019, and was subsequently seen in South Korea, Italy, France, Germany and Iran, before hitting most countries on the planet, justifying the name pandemic. In Africa, the first case occurred in February 2020 in Egypt, and now all 54 countries on the continent are affected by the pandemic, although the continent has been less affected than predicted. This crisis, which has induced a triple shock - of supply, demand and finance - has affected, through several transmission channels, all spheres of life in society:

> the social sphere, as the rapid spread of this epidemiological shock has resulted in a large loss of life and a considerable increase in the number of people affected;

[1] The Observatory of Emergence in Africa (OBEMA) of the University of Montreal

the economic sphere, which is the focus of this report, due to the initiation of widespread containment measures, quarantines and business closures to limit the spread and transmission of the pandemic.

the cultural sphere ;

Socio-political systems are also affected, as are scientific and technological advances, not to mention the environment.

In response to the rapid spread of the pandemic in Africa, the African response was prepared and organised, taking into account the particularities of the continent (insufficient equipment, difficulties in implementing strict containment measures, immediate loss of household income, difficulties in supplying cities). Although some strong physical measures were able to be taken in most countries, the top priority was to increase health spending to save lives and, at the same time, to put in place funding for those whose livelihoods were disrupted. Timely and substantial assistance has been crucial. This may have been in the form of cash transfers or in-kind support to vulnerable households, including informal sector workers, or targeted and temporary support to hard-hit sectors (IMF, 2020).

With regard to economic damage, measures similar to those in industrialised countries were put in place. These included tax cuts, longer tax payment periods, exemptions or deferral of social security contributions, subsidised loans, suspension of loan repayments, etc. In the short term, measures have been aimed at strengthening health systems, providing cash and in-kind support to workers (formal and informal), providing cash support to viable businesses (formal and informal), and ensuring the delivery of public services. Other measures to limit the impact of the pandemic on the economic situation of countries have been initiated to support households and economic activity. These include support to the most affected sectors (tourism, travel, transport, retail, etc.), cash and in-kind transfers to vulnerable groups, and tax relief for the most affected individuals and businesses. Also, in response to the rapid spread of the pandemic, several countries have developed and implemented large-scale economic stimulus packages, with the aim of reviving the productive system, strengthening social resilience and health systems.

However, the economic downturn has not spared any country. Under the combined effect of the serious disruptions to domestic supply and demand as well as external trade, economic activity declined by 1.9% in sub-Saharan Africa in 2020, according to estimates by the International Monetary Fund (World Economic Outlook, March 2021). The brutal shock of the pandemic, in a context already marked by the fragility of productive systems (weak diversification, insufficient or non-existent regional integration of national economies into real value chains, strong external dependence) explains,

to a very large extent, such a significant drop in GDP on the continent. The logical consequence is job losses and an increase in the number of people living below the poverty line. Per capita income has been affected and has fallen by an average of 3.6% in 2020.

However, the health picture is less alarming. In health terms, the alarming figures were over 416.6 million confirmed cases worldwide and 5.8 million deaths, representing a case-fatality rate of 1.4% according to the latest information from the World Health Organisation (WHO). The recent evolution of the Covid-19 pandemic indicates that in January 2022, the world has experienced an 5th accelerated wave of infection by several sets of Covid-19 variants, the most recent and highly contagious of which is the Omicron variant, which has spread from South Africa.

The African continent has activated its vaccine strategy with a progressive deployment of vaccines in 52 out of 54 countries. According to figures from the African Centre for Disease Control and Prevention (Africa CDC), a total of 669.1 million doses of vaccine have been donated with over 60.62% of these doses, or 403.3 million doses, already administered. The number of people fully vaccinated with both doses amounts to 12.13% of the total African population. Overall, Africa has the lowest vaccination rate, with about 17% of its population having received at least one dose. The African countries with the highest vaccination rates are Seychelles (79.66%), Mauritius (72.88%) and Morocco (62.74%).

The shock of COVID-19 has put a strain on health systems and exposed their vulnerabilities. The impact of the pandemic was firstly a decline in the use of health services and secondly a reduction in the capacity to manage other endemic diseases such as tuberculosis, HIV-AIDS, and malaria.

More globally, the Covid-19 pandemic is expected to lead to a decline in the HDI at the global level in general, and in Africa in particular. The magnitude of the Covid-19 shock on the different dimensions, namely health, education and standard, could lead to the largest reversal of the human development trend since 1991.

However, the impact of COVID-19 has often been analysed in terms of economic cost. Such an approach is useful but reductive because health is much more than the absence of disease.

At the ***political level, it*** can be observed that, in the name of the health emergency, some governments have taken measures that run counter to democratic procedures for adopting regulations and, as a result, compromise the effective implementation of development plans.

As for the analysis of the impact of the crisis on the emergence trajectory of countries, this is proving to be a difficult exercise insofar as the virus has not yet given up all its secrets and there is a lot of uncertainty as to the effectiveness of vaccination, which remains, to date, the most effective weapon for containing and stopping the spread of the virus. As mentioned above, from the 2010s onwards, many African countries have designed and implemented development plans whose central objective is to create the conditions for long-term sustainable growth. These plans have often been presented as leading to emergence. However, the economic recession triggered by COVID-19 broke this momentum in 2020, calling into question whether the national economies would remain on a sustained economic growth path for almost two decades.

Emergence has been submerged, some media outlets have reported, especially when floods or political crises in some already hard-hit countries have further darkened the landscape. However, according to the three African Emergence Index reports published to date by the African Emergence Observatory and the Research Centre on Africa and the Emerging World at the University of Montreal, the countries under review, with the exception of three countries, have been able to regain and even surpass in 2021 their 2019 emergence score. This could mean, without prejudging the long-term impact of COVID-19, that most countries have returned to their emergence trajectory by 2021.

Against this background, it is legitimate to ask the question "what will happen to emergence in the future? In response to this question, three families of scenarios and strategies are possible:

1. An ***incremental*** strategy would be to consider that COVID-19 is a bump in the road but that there is no need to change course because the robustness of the system has not been called into question. Some will even argue that Africa has shown an unsuspected resilience. The reforms to be implemented as a matter of priority belong to the category of ***reactive strategies*** which aim to plug the most obvious gaps and to restart (Reset/relance) as soon as possible a machine which has been temporarily stopped;
2. A so-called ***adaptive*** strategy**,** based on the observation that the pandemic has revealed the urgent need to strengthen health systems (financing, organisation, competence of the actors who implement health policy, response to the needs of users) in Africa. More specifically, it highlighted the continent's backwardness in the areas of research and medical production. The pandemic has also disrupted education and vocational training systems in a region where 60% to 70% of the population is under 35 years old. School closures for long periods have resulted in reduced learning time and disrupted learning patterns. The reforms to be implemented will be to increase

investment in areas where countries have been lagging behind. It will be a matter of promoting policies that enhance the value of human capital. This priority given to human capital is in line with the spirit of the SDGs and the paradigm underlying the "emergence pyramid".

3. A "***refounding*** strategy"**,** based on the fact that decision-makers should not accept the status quo but should instead engage in critical reflection on Africa's place in the post-CIVID-19 era. For the refounders, it is a matter of revisiting emergence, placing or repositioning it within the alternative paradigm of human security. In other words, it is a question of moving "from current vulnerabilities to new opportunities".

It should be noted that a definitive conclusion on the socio-economic, health and even political impact and effect of the COVID-19 crisis on the emergence trajectory of African countries remains uncertain, and that inaction in the face of the ensuing changes could be costly to the continent.

I. Introduction

The fourth edition of the International Conference on Emergence (ICEA-IV) entitled **"Seizing the Opportunities of the Covid-19 Pandemic to Accelerate Emergence"** is scheduled for 2022 in Abidjan.

This event will be an opportunity to :

Review the implementation of the various resolutions of the ICEA-III held in Dakar in 2019;

Provide updated data to assess the level of impact of the Covid-19 health crisis on the fundamentals of the plans and emergence trajectories;

assess (i) the results of the anti-COVID economic recovery plans implemented in Africa; (ii) from a more global point of view, the response capacity of public and private structures in Africa (health systems, research in general and medical research in particular, production of vaccines and medicines, cooperation between modern and traditional medicine, etc.);

analyse the constraints linked to financing emergence plans in Africa;

propose solutions in terms of structural reforms, new conceptual approaches to emergence plans in Africa, with a focus on developing the capacity for long-term analysis and anticipation to cope with future shocks;

Taking stock of emergence in Africa;

reconsider the 2015 Abidjan Declaration and the criteria and conditions for emergence by drawing lessons from the pandemic;

launch the start-up of the Strategic Watch Centre on Africa's Emergence.

This next edition is therefore designed to offer decision-makers and development actors a platform to update the assessment of emergence in Africa and capitalise on the lessons learned from the first three editions in the light of the multidimensional crisis generated by the COVID-19 pandemic which, since January 2020, has been affecting the world.

This health crisis, which continues and gives rise to more or less virulent "waves", is considered by many analysts as the first global crisis of our century.

Global, in the basic sense, because it affects all parts of the globe. First appearing in Wuhan, China, on 31 December 2019, the coronavirus disease, as it is also called, was subsequently observed in South Korea, Italy, France, Germany and Iran, before hitting most countries on the planet, justifying the name of pandemic. In Africa, the first case occurred in February 2020 in Egypt, and now all 54 countries on the continent are affected by the pandemic. It is a reminder that, for better or worse, globalisation tends to abolish borders.

Global also in the sense that all spheres of life in society are concerned and affected by the pandemic:

the social sphere, as the rapid spread of this epidemiological shock has resulted in a large loss of life and a considerable increase in the number of people affected;
the economic sphere, due to the initiation of widespread containment measures, quarantines and closures of businesses and air and land borders to limit the spread and transmission of the pandemic;
the cultural sphere.

Also affected are socio-political systems, but also scientific and technological advances, not to mention the environment.

Because of these characteristics, the current crisis is in many ways unprecedented, and it is not surprising that it has had a 'shocking' effect in many epistemic circles and communities.

1.1 Objectives of the report

This report focuses on the economic aspects of the pandemic. There are several reasons for this choice, two of which deserve to be highlighted:

The first is that this health crisis has caused an unexpected reversal in global economic conditions, including negative supply and demand and financial shocks. "Sub-Saharan Africa is facing an unprecedented health and economic crisis that threatens to stumble the region and reverse the development gains of recent years," says the IMF [2]

The second reason for this focus is the controversial nature of the impact of the COVID-19 crisis on the emergence trajectory that most African countries have been on for at least a decade. Indeed, at the time of the COVID-19 pandemic came about

[2] See the *Economic Outlook for Sub-Saharan Africa (Perspectives économiques pour l'Afrique subsaharienne)* of 15 April 2020.

in Africa, emergence was on the agenda in almost all African countries. Admittedly, its genealogy was somewhat truncated because it was generally presented as emanating from the vision of the leader of the hour and not from a Dutch economist Antoine van Agtmael, whose name is not sure to go down in history. Of course, emergence had different names in different countries and referred to different conceptual frameworks[3] . For some, it was part of the post-adjustment policies of human development, sustainable human development and human security, promoted by the institutions involved in the 'New York Consensus' (UNDP, UNICEF, UNFPA) as opposed to the Washington Consensus. For others, 'structural transformation' was the conceptual basis for emergence, with the term 'structural transformation' having a more radical connotation[4] .

Table 1: Topics covered in the different national reports

	CAMEROUN	COTE D'IVOIRE	ETHIOPIE	GABON	KENYA	MADAGASCAR	MAROC	MAURICE	NIGERIA	RWANDA	RDC	SENEGAL	AFRIQUE DU SUD	TUNISIE
I. Main results of the implementation of the emergence strategies/plans	x		x	x	x	x		x	x	x	x	x	x	x
II. State of play and assessment of the effects of the Covid-19 pandemic (political, economic, social welfare, cultural, environmental, etc.)	x	x	x	x	x	x	x	x	x	x	x	x	x	x
2.1 State of play in countries before Covid-19	x	x	x	x	x	x	x	x	x	x	x	x	x	x
2.2 Brief overview of the pandemic in the countries, the policy measures and their effects on the political, cultural environment, etc.	x	x	x	x	x	x	x	x	x	x	x	x	x	x
2.2 Status of implementation of emergence plans :	x	x	x	x	x	x	x	x	x	x	x	x	x	x
2.2.1 Status of structural transformation - Analysis of the growth decomposition - Analysis of the sectoral structure of GDP - External trade structure (including inclusion in regional and global value chains) - Sectoral employment dynamics (including the functioning of labour markets) - Sectoral dynamics of productivity - Emergence of a middle class	x	x				x	x		x		x			x

[3] See Emerging 2021 Index of the Observatory of Emergence in Africa of the University of Montreal, Canada

[4] The term 'structural transformation', which gained momentum and media coverage in the 2010s, under the impetus of the ECA, was in fact coined in 1986 by the authors of the book 'Sahel and the Future', who saw it as an alternative to 'growing dependence'.

2.2.2 Accelerating factors of structural transformation - Human capital development - Poverty and inequality dynamics (social protection systems) - Nutrition and food safety - Total factor productivity - Foreign direct investment - Financing the economy (including financial markets) - Governance and quality of institutions	x	x				x	x		x		x			x
2.2.3 Macroeconomic framework (including debt and development financing strategies)	x		x			x			x		x		x	x
2.3 Health impact, national resilience, country management of the pandemic and intra-African cooperation in the national, sub-regional and regional response	x	x	x		x	x			x		x		x	x
2.4 Impact of Covid-19 on emergence trajectories					x	x			x		x		x	x
III. Analysis of the specific effects of the pandemic on the country's emergence trajectories		x				x			x	x	x	x	x	x
IV. Prospective analysis of the country's post-COVID economic and social development - Production methods, infrastructure, industrialisation and ICT - Governance, democracy and human rights - Treatment of national and domestic debt owed to the private sector - Treatment of private sector debt - concrete actions to implement the AfCFTA and strengthen regional integration - Strategies and structural reforms for the country's economic and social emergence and development - Opportunities to strengthen intra-African and South-South cooperation		x	x	x	x	x	x	x	x	x	x	x	x	x

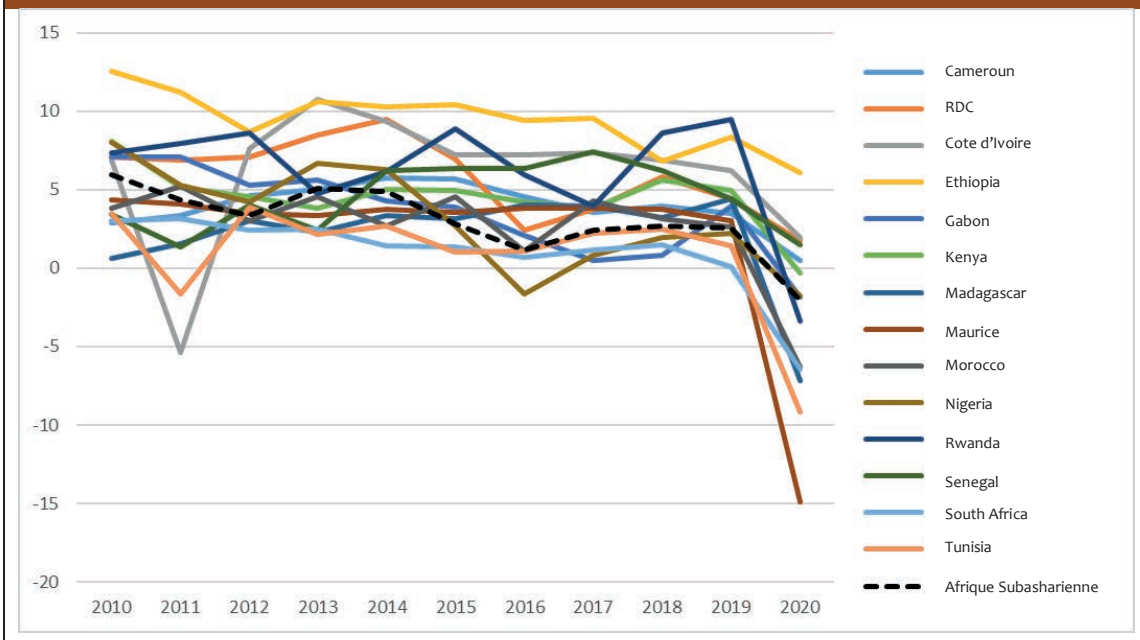
Source: UNDP

However, whatever the ideological referents of emergence, the strategies envisaged and/or implemented to achieve it set out the following imperatives: (i) a stable macroeconomic framework, (ii) a sustained rate of investment (public and private), (iii) structural transformation of the economy, (iv) opening up to the outside world and competitiveness of the economy, (v) a sufficient level of physical infrastructure and human capital, (vi) transparent operation of markets supported by efficient institutions. A certain *doxa* had thus been established. We must believe that these recipes have had positive effects where they have been applied, since "*African countries that are candidates for emergence (such as Côte d'Ivoire, Gabon, Nigeria, Senegal, Morocco, Tunisia, South Africa, Kenya, Rwanda, etc.) have recorded remarkable performances from 2012 to 2019, through the implementation of five-year development plans with remarkable practices: the dynamics driven by investments and reforms have made it possible to achieve an average annual growth rate of 6%, as well as an increase in GDP per*

capita, allowing a reversal of the upward trend in the poverty rate in some countries. [5]

The pandemic disrupted this upturn, which seemed to allow all to raise their hopes. Indeed, the many efforts made by states to initiate or consolidate policies for economic emergence and development were disrupted in 2020 due to a significant slowdown in economic growth, rising unemployment and strong inflationary pressures. While it has not yet said its last word, and further spikes cannot be ruled out, it is widely acknowledged that African emergence, in its various forms, has already been negatively affected by COVID-19 (see Figure 1) through several channels, the most visible of which are trade, foreign direct investment, public finance, tourism, hospitality and air transport.

Figure 1: Growth rates of the 14 selected countries over the period 2010-2020



Source: WDI, World Bank

In this respect, it is not unreasonable to think of COVID-19 as a *"game-changer"*, the shock it represented being of such a magnitude that there will be a pre- and post- COVID world: this is at least what emerges from the present report, which describes and analyses in a synthetic manner:

the strategic emergence frameworks in force in the different countries;
the state of implementation of the emergence plans and the state of play of the countries selected before COVID-19 Crisis;

[5] ICBE IV Concept Note

the impact of the COVID-19 crisis on the economies as well as on the emergence trajectory;
post-COVID development perspectives.

1.2 Methodology

For the production of this synthesis report, two methods were used:

Review of the general literature on the region

A rich literature on emergence in Africa, and more specifically on the fourteen countries under review, has been reviewed. It consists largely of academic works, but also of publications from the countries' official services and from national and international development agencies, both public and private. The bibliography annexed to the report lists some of these publications

Analysis of national case studies

With the technical and financial support of UNDP, fourteen (14) case studies were produced covering: (i) Côte d'Ivoire, Senegal and Nigeria for West Africa; (ii) Morocco and Tunisia for North Africa; (iii) Kenya, Ethiopia and Rwanda for Southern Africa; (iv) Democratic Republic of Congo, Cameroon and Gabon for Central Africa(v) South Africa, Mauritius and Madagascar for Southern Africa.

The main objective of these case studies was to feed into the ICEA-IV discussions and to allow the selected countries to benefit from a critical look at their path to emergence.

Specifically, this involved :

- Reviewing the effects of COVID-19 on national development or emergence plans and their implementation;
- Analysing the impacts on the political, economic, social, cultural, environmental, etc. levels;
- Document some African best practices.

In these country reports, the scope covered is essentially that of the *economy* or political economy, through the state of structural transformation, the factors accelerating structural transformation, the macroeconomic framework (including debt and development financing strategies).

1.3 Structure of the report

This report is divided into three parts, framed by an introductory chapter and a concluding chapter.

The first will relate to the conceptual, analytical and methodological frameworks of emergence in the countries. The question that this chapter will have to answer can be formulated as follows: **what is emergence called and how have countries sought to ensure its operational translation**? It could be said that it is a **retrospective analysis that** should make it possible to know a) what is the specificity or added value of emergence in relation to previous models? b) how do the analytical components of emergence - institutional, economic and social transformation - fit together from a systemic point of view? c) what tools, methods and processes have been implemented to prepare, monitor and evaluate emergence plans?

The second part will deal with the impact of the COVID-19 pandemic. The aim is to answer the question of **where countries stand and what changes COVID has introduced** ? This part is akin to a **diagnosis.** Many analyses have been devoted to the economic and health impact of the crisis; this report is in line with this for reasons already mentioned. However, because of its global nature, also mentioned above, the impact of the pandemic will be analysed from other less well-studied but equally essential aspects as the economic dimensions: it is, in this case, the social, political, environmental, cultural and technological facets of the pandemic that this report will also attempt to shed light on. Going beyond the photograph, this second part will attempt to highlight the dynamics that explain the situation and, as far as possible, the interaction between the different areas affected by the pandemic.

The third part will explore the various options available to countries. Since a crisis is always both a threat and an opportunity, the report will focus on the state of thinking on how to turn crisis into opportunity. This third part **will therefore deal with the desirable, plausible or possible future or futures for countries**. This part is therefore, strictly speaking, **prospective** in that it will explore the field of possible futures.

II. Conceptual, analytical and methodological frameworks for emergence

2.1 Contexts and overviews of strategic frameworks for emergence and development in Africa

The question that this chapter will have to answer is: **what is emergence called and how have the African countries under review sought to ensure its operationalization** ?

The context is dominated by the importance of a notion - that of emergence - which could be said to be comparable to Sleeping Beauty. It is like an impressionist painting to which each human group adds its own touch. According to the Observatory of Emergence in Africa (OBEMA) of the University of Montreal, "Attempts to define emergence depend on the approaches to the subject, of which at least two deserve to be presented here. The first considers emergence from the perspective of international finance, which has coined the term 'emerging market'. The defining criterion here is the high attractiveness of markets in which to place capital abroad, particularly in developing countries (van Agtmael 2007). The International Monetary Fund (IMF) thus refers to capital markets in developing countries that have liberalised their financial systems to promote capital flows and are widely accessible to foreign investors (IMF, 2006). The second approach is academic. Here, the focus is on the impact of the emergence phenomenon on the recomposition of international geo-economic and geopolitical balances. In conceptualising the BRICs, the economist Jim O'Neill anticipates the growth in GDP of Brazil, Russia, India and China, pointing out that the weight of certain countries in this group was already, at that time (in 2001), greater than that of certain G7 economies (O'Neill 2001). For others, three measurement criteria should be retained: strong and sustained growth in an economic and social context still marked by great poverty, relative institutional stability and a will to power that raises apprehensions because the emerging countries are asserting themselves on the international scene at the expense of *the traditional powers*?[6] . The economist Moubarack LO, in his "Handbook on Economic Emergence", also attempts to conceptualise emergence and sets out an approach to quantify it.

None of these conceptualisations is, strictly speaking, adapted to Africa, because according to them no African country would meet the criteria for emergence; not

[6] The Observatory of Emergence in Africa (OBEMA), Report 2021

even South Africa, despite being a member of the BRICS Club[7] . In this respect, and even more so for other African countries, a certain pragmatism seems to have prevailed over theoretical orthodoxy or doctrinal purity. It is as if the initiators of the emergence plans and their analysts were adopting the famous aphorism according to which "an operational imperfection is better than a non-operational perfection.

Nevertheless, efforts to conceptualise emergence in Africa are being made by African and non-African researchers, and by African and non-African, public and private institutions. Books such as Antoine Ngakosso's book *on economic emergence in sub-Saharan African countries: how to achieve it?*[8] *and* Moubarack Lo's *manual on economic emergence*[9] are devoted to it. The conceptualisation of emergence in Africa is made difficult by the divergent interpretations of the initial situations, the uneven level of development of the continent's countries, the diversity of emergence trajectories depending on whether or not the countries have natural resources, etc.

There are, however, commonalities in the discourse on emergence and the approaches to establishing it. Three of them are worth mentioning.

a. Emergence remains underpinned by Rostow's idea of economic leaps, while implicitly drawing on the trajectory of Asian developmental states (Routley 2014).

b. An anchoring on a long-term vision.

The strategic frameworks of the fourteen (14) countries selected for the case studies are all based on a global vision of economic and social development, generally set out in a long-term vision document, a national development plan or an emergence plan with a well-defined time horizon (2040 for Côte d'Ivoire, 2050 for Nigeria, 2035 for Senegal and Cameroon, 2030 for South Africa, Mauritius, Kenya, Ethiopia and the DRC, 2050 for Rwanda, 2025 for Gabon). This vision is then broken down into medium and short-term plans (see Figure 2).

[7] It should be noted that South Africa was not included in the initial list of BRICS. Political considerations seem to have played in favour of its admission to the club.
[8] L'émergence économique dans les pays de l'Afrique subsaharienne : comment y parvenir, Harmattan, Collections études africaines, Antoine Ngakosso, October 2017
[9] Manuel d'émergence économique, Harmattan Sénégal, Moubarack Lo, Amaye S, June 2021

Figure 2: Country policy frameworks for the case studies

01	**Cameroun** Vision Cameroun 2035	08	**Maurice** Stratégies sectorielles
02	**Côte d'Ivoire** PND 2021-2025	09	**Nigeria** Nigeria Vision 20:2020
03	**Ethiopia** Growth and Transformation Plans I & II (2010-2020)	10	**RDC** Plan National de Développement (2019-2023)
04	**Gabon** Plan stratégique Gabon Emergent (2009-2025)	11	**Rwanda** Stratégie Nationale de Transformation (2017-2024)
05	**Kenya** Vision (2030)	12	**Senegal** Plan Senegal Emergent (2014-2035)
06	**Madagascar** Politique Générale de l'Etat de 2019-2023)	13	**South Africa** Plan National de Développement
07	**Morocco** Stratégies sectorielles	14	**Tunisia** Plan National de Développement (2016-2020)

Source: UNDP, case studies

c. Common themes widely shared

The main objective of the national development or emergence plans of these economies is to create the conditions for sustainable growth and inclusive development. These plans are generally structured around the following six (6) main areas

i. Preservation or strengthening (depending on the economy) of the stability of the macroeconomic framework

ii. The structural transformation of the economy through the promotion of growth sectors (differentiated according to the economies), the promotion of social inclusion, the development of the private sector and the improvement of the efficiency of investments in the economy, the development of clusters, the development of quality infrastructure, the improvement of access to energy and land, the increase in productivity and the promotion of the industrialisation of economies;

iii. The promotion of export sectors in order to improve insertion in global value chains and the competitiveness of the economy;

iv. The improvement of human capital and social protection, in particular through the improvement of the state of health and nutrition of the population, the promotion of quality education in all the economies concerned, in line with socio-economic, environmental and cultural needs, and the promotion of research and innovation, improving access to energy in rural areas in most economies, improving access to quality water and sanitation, improving access to social housing and a decent living environment, promoting decent work, accelerating the pace of the demographic transition in most economies, strengthening social protection;

v. Preservation of the environment, control of natural resource management (particularly for resource-rich economies) and reduction of the adverse effects of climate change;

vi. Improving governance, reforming and modernising public administration, strengthening institutions, transforming economies culturally and preserving peace and security. This area, present for the majority of economies, consists mainly of improving the quality of public service, strengthening citizenship and the rule of law, promoting gender equity and equality, strengthening peace and security and strengthening territorial governance.

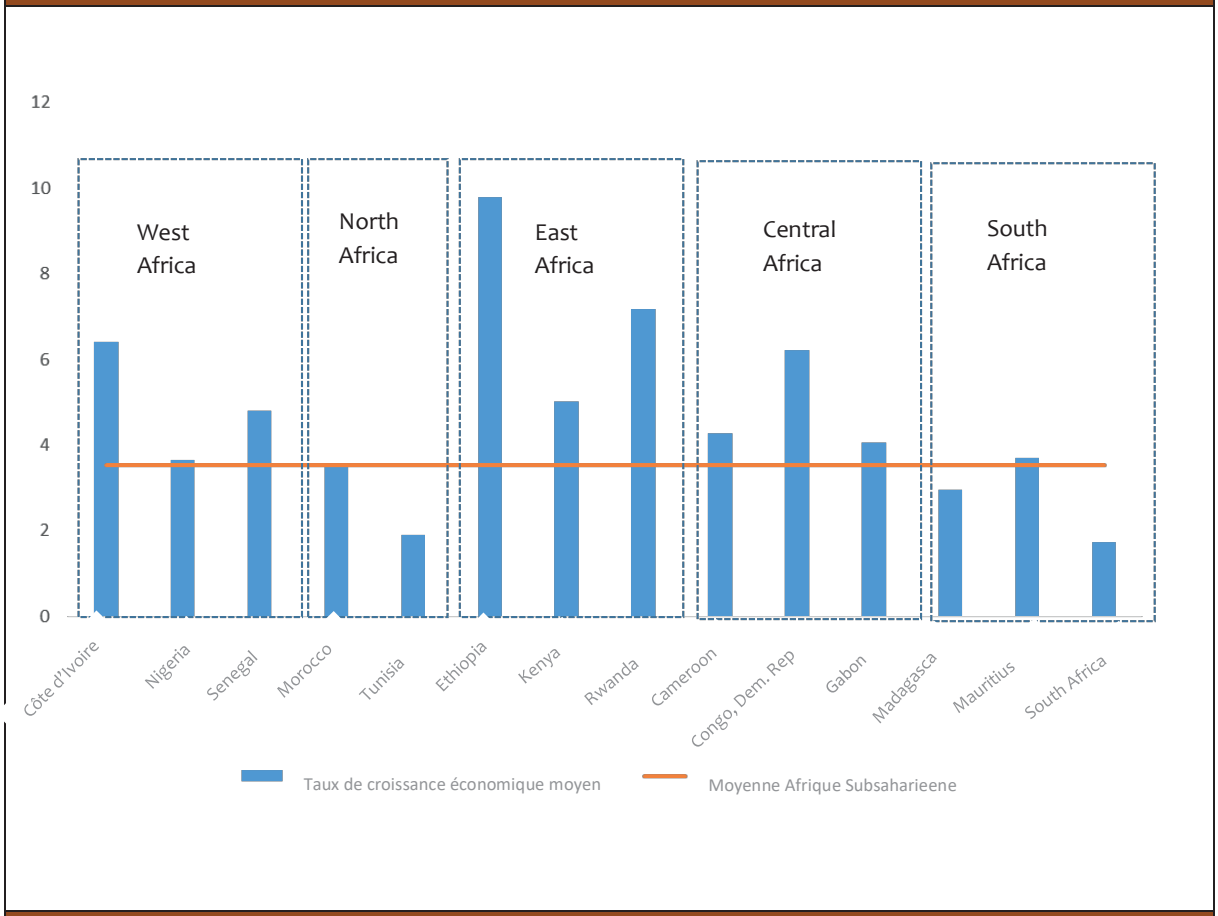
To conclude this section, two points should be noted:

a. Some concerns/themes are very old and others more recent: an "archaeology of knowledge" on emergence, besides being quite possible, could be enlightening.
b. These themes are based on different frames of reference: neo-liberal for some, mercantilist for others, and socially inspired for others. As the balance between these frames of reference is sometimes difficult to find because it is not self-evident, political, and not just technical, arbitrations are often necessary.

2.2 Implementation of emergence plans and results before COVID-19

Prior to the outbreak of the COVID-19 crisis in 2020, most of the countries under review performed well in terms of economic growth over the 2010-2019 period, with economic growth rates on average higher than that of Sub-Saharan Africa (see Figure 3).

Figure 3: Average economic growth rate between 2010 and 2019



Source: WDI, World Bank

East African countries (Ethiopia, Kenya and Rwanda) have the best overall economic growth performance prior to the COVID-19 crisis. Tunisia, Morocco and South Africa have average performances that are generally below that of Sub-Saharan Africa.

Ethiopia is likely to be the best performing economy in the sample of case study countries, with an average growth rate of 9.8% over the period 2010-2019, resulting from the active implementation of the two growth and transformation plans (I & II over the period 2010-2020). Although the growth rates were lower than the targets set by the government in the said national economic plans, economic growth was high, averaging 10.1% for the period 2010-2015 and 10.8% for the period 2016-2020 (see Table 2).

Table 2: Performance of development plans (percentage growth rates)

Sectors	2010-2015		2016-2020	
	Forecasted	Realised	Forecasted	Realised
Agriculture	8,6	6,6	8,0	4,1
Industries	20,0	19,1	20,0	15,2
of which manufacturing		15,1	21,9	13,0
Service	10,6	11,1	9,6	8,2
GDP	**11,2**	**10,1**	**10,8**	**8,2**

Ethiopia's outstanding performance prior to the VIDCO-19 crisis has contributed significantly to progress towards the Sustainable Development Goals, including

(i) **Poverty reduction**: the proportion of people living in poverty has almost halved from 45% in 1995/96 to 23.5% in 2015/16 and 21% in 2018;

(ii) **Reduction of inequalities:** the incidence of poverty (using a consumption-based measure of poverty) has declined quite substantially, from 38.7 per cent in 2004/05 to 23.5 per cent in 2015/16 and 29.6 per cent in 2010/11. Income inequality measured by the Gini coefficient remains low and stable over the last two decades of 33 per cent (UNDP, 2017) ;

(iii) **Hunger reduction:** Ethiopia is one of the countries that has made the most progress in absolute terms in improving its global hunger index score between 2000 and 2020 (53.7 in 2000, 26.8 in 2020);

(iv) **Access to safe drinking water and sanitation for all**;

(v) **Access to quality education: There has been** remarkable progress in education. Between 2004 and 2018, the net primary school enrolment rate increased from 49% to almost 95%, while the primary school completion rate (grade 8) increased from 38% to 57.7% during the same period. Similarly, the gender parity index for primary school completion between 2004 and 2015 increased from 63 to 96 girls per 100 boys.

Ethiopia has made several other major advances in the areas of good health and well-being, gender equality, access to affordable and clean energy, climate change and access to decent work for people.

Another country that stands out in Africa for its macroeconomic performance is **Rwanda**. The country has been implementing its Vision 2020 with several short/medium term strategy papers (Poverty Reduction Strategy Paper, the two economic development and poverty reduction strategies) very

intensively, which has contributed to significant progress in social sectors such as health and education, as well as productive sectors such as agriculture, infrastructure and industry. By 2013, Rwanda had caught up and progressed beyond the economic conditions prior to the genocide in 1994. Growth has averaged 7.2%[10] over the last decade to 2019, while per capita domestic growth product (GDP) has increased by 5% per year. Rwanda's strong economic growth has been accompanied by substantial improvements in living standards, with a two-thirds decline in child mortality and near universal primary school enrolment. The focus on local policies and initiatives has contributed to significant improvements in access to services and human development indicators. As measured by the national poverty line, poverty fell from 77% in 2001 to 55% in 2017, while life expectancy at birth improved from 29 in the mid-1990s to 69 in 2019. The maternal mortality ratio fell from 1,270 per 100,000 live births in the 1990s to 290 in 2019. The official measure of inequality, the Gini index, has decreased from 0.52 in 2006 to 0.43 in 2017.

The political and military crisis between 2000 and 2010, immediately followed by a post-electoral crisis in 2010, plunged **Côte d'Ivoire** into a difficult economic context. These events led to a slowdown in economic activity, destruction of social infrastructure, weakening of the productive fabric, mistrust of foreign partners and investors, etc. However, 10 years after the end of the crisis, Côte d'Ivoire is economically very resilient. GDP has rebounded sharply in the post-crisis period, with an average annual growth rate of 7.8% between 2012 and 2019, compared with a stagnation trend over the decade 2000-2011 with an average growth rate of 0.7%. The country is engaged in a clear process of strengthening economic infrastructure, diversifying the economy and intensifying manufacturing. This reflects an economic recovery, or even the start of a serious process of economic emergence for this country. This dynamic, which has resulted in the success of the two National Development Plans 2012-2015 and 2016-2020, is supported by a clear vision of the authorities according to which the revitalisation of the economy requires a repositioning of agriculture, a policy of attracting investors in sectors such as energy, the development of supports such as ICT, the financial sector, etc.

However, the good performance recorded in terms of economic growth has not translated into a sufficient increase in GDP per capita in Côte d'Ivoire to reach the 2018 target (1 032 thousand CFA Francs) and the 2020 emergence target (1 236 CFA Francs). Some structural problems remain, notably the low level of diversification of the Ivorian economy, which makes it less resilient and vulnerable to external shocks, the failure (overcrowding) of the country's health system, and the

[10] WDI, World Bank, 2022

shortage of quality human, material and financial resources, and the unequal distribution according to living environment and region, already limit the effectiveness of development policy interventions even before the Covid-19 pandemic.

In Central Africa, the **Democratic Republic of Congo** (DRC) stands out as the best performing of the three countries in the region under review. This country has enjoyed a decade of implementation of its various strategic orientations, as outlined in its main planning documents[11] , accompanied by implementation tools in the form of various government action plans. The main objectives were to improve the living conditions of the population, to achieve robust and environmentally friendly economic growth, to reduce the incidence of poverty and create decent jobs in a context of inflation control, and finally to ensure the structural transformation of the Congolese economy for its emergence and to make the DRC a middle-income country by 2024 by easing all the constraints on its development process. The decade of implementation has produced more or less mixed results. However, there has been an improvement in the country's economic governance. Indeed, the economy grew at an average rate of 6.2% between 2010 and 2019, with a low of 2.4% in 20112 and a high of 9.5% in 2014. However, it is still insufficient to begin the transformation of the economy towards the path of emergence, which, according to the experiences of other countries, requires an average of about 10% over two to three decades. The basis of national wealth creation is still too narrow and dominated by the extractive industries, which exposes the economy to the risks of a downturn in the international economy, and could alienate the efforts made. According to the National Institute of Statistics (INS), the poverty rate (at a threshold of USD 1.25 per day) was less than 60% in 2015, compared with 63.4% in 2012, 71% in 2005 and 85% in 1990. This downward trend in the incidence of poverty is the result of continuous and sustained growth over more than a decade, and a set of economic and financial reforms aimed primarily at the stability of the macroeconomic framework.

Moreover, despite significant progress in fiscal management, the credibility and efficiency of the government budget remain challenges. The financial sector is still struggling to raise credit and increase financial intermediation due to problems related to risk and the business climate.

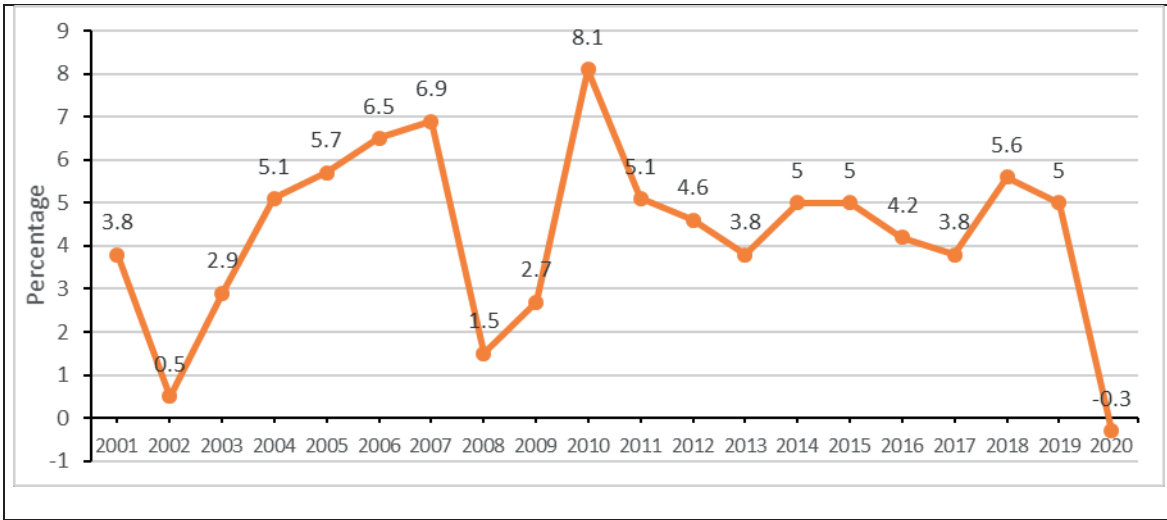
[11] Namely the second generation Growth and Poverty Reduction Strategy Paper 2010-2015 (GPRSP-2 2010-2015), the National Strategic Development Plan 2017-2021 (NSDP 2017-2021) and the revised National Strategic Development Plan 2019-2023 (NSDP 2019-2023)

Unemployment remains high in the economy, but it is on a downward trend.

Socially, the country has seen an increase in school enrolment, vaccination coverage, health coverage and a decrease in the incidence of endemic diseases. These encouraging results are, however, insufficient to meet the needs of a growing population and an increasingly diversified demand for services. In terms of sanitation, despite progress resulting from the government's extensive joint sanitation programme with the *Clean Villages and Schools* project, three out of four households still do not have access to sanitation. Furthermore, although the national electricity access rate improved significantly between 2012 and 2015, from 6% to 15%, thanks to a large-scale power plant construction and rehabilitation programme, the country has not yet reached the target of 15% of the population. However, the DRC did not reach the target of 56% in 2016 as expected.

Kenya's strategic development framework is based on its development plan, *Vision 2030*, which has three main pillars: (i) *the social pillar with the objectives of achieving a sustainable and cohesive society, (ii) the economic pillar aiming to achieve 10% growth per annum*, and (iii) *and the political pillar focusing on the establishment of a democratic political system*. Vision 2030 is implemented through three five-year plans (2008 - 2012, 2013 - 2017 and 2018 - 2022). In its latest five-year plan, the government has prioritised policies, programmes and projects that support the implementation of the "Big 4" Agenda, which covers the areas of universal healthcare, industry, affordable housing for all and food security. These priority areas are in line with the African Union's Agenda 2063, the 2030 Sustainable Development Goals (SDGs) and Article 43 of the 2010 Kenyan Constitution, which recognises, for example, the right to affordable housing. The implementation of these various medium-term plans has led to variable economic performance over the past decade, with clear trends during certain periods. Real GDP has always declined during or immediately after election years, i.e. in 2002, 2008, 2013 and 2017 (Figure 4).

Figure 4: Kenya's economic growth rate between 2001 and 2020



Source: Kenya case study

In the pre-pandemic period, the lowest real growth rate (0.5%) was recorded in 2002, while the highest real growth rate (8.1%) was recorded in 2010. The country recorded an average annual growth rate of 4.7% between 2011 and 2019.

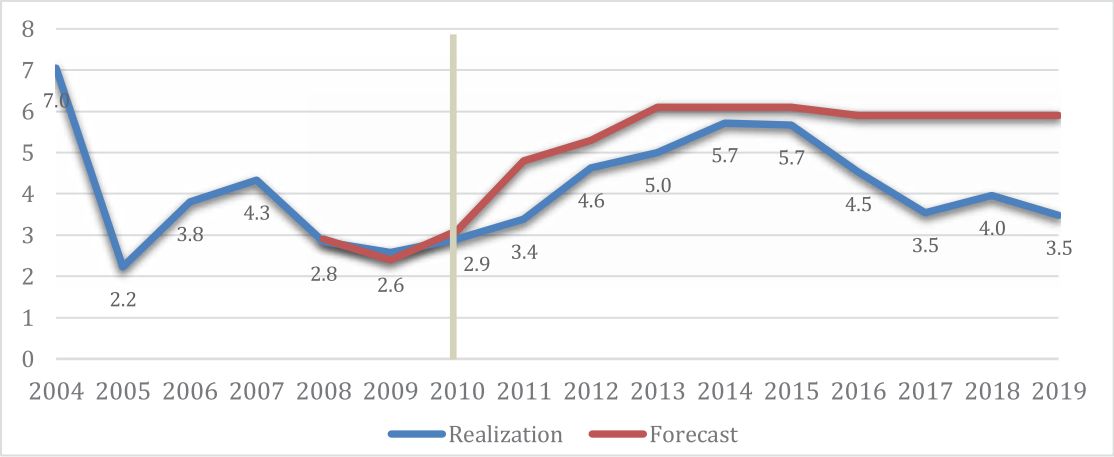
In order to trigger economic dynamism with sustainable and inclusive growth, **Senegal** has developed and adopted the Senegal Emergence Plan (PSE) as a model for steering its economic and social policy. This vision should result in a real GDP growth rate of 7% to 8% and a per capita GDP that should be multiplied by 1.5. The PSE has set itself the vision of "*An Emergent Senegal in 2035 with a society based on solidarity and the rule of law*". It comprises 3 strategic axes: *(i) Axis 1: structural transformation of the economy and growth, the objective of which is to identify the main sectors driving job creation and social inclusion, as well as export sectors and guaranteeing the attractiveness of Foreign Direct Investment; (ii) Axis 2: human capital, social protection and sustainable development, aiming to provide Senegal with quality human capital capable of taking up the challenges in the implementation of the PES; and (iii) Axis 3: Governance, institutions, peace and security, which deals with the rules to be established and respected in order to create and maintain mutual trust between the various actors: government and public administrations, local authorities, the private sector, civil society and technical and financial partners.*

The first phase of PES implementation has enabled the Senegalese economy to have one of the highest growth rates in sub-Saharan Africa. Compared to the previous period (pre-PES), the average growth rate was multiplied by 3. With an average growth rate of 6.1% over the period 2014-2019, Senegal was above the average for Sub-Saharan Africa and outperformed several other countries in the sample such as Mauritius (3.6% over the same period), Gabon (2.6% over the same

period) or South Africa (1.0% over the same period). Only Ethiopia (9.1%), Côte d'Ivoire (7.4%) and Rwanda (7.2%) performed better than Senegal over the same period 2014-2019 in the sample of case study countries. However, the PES has not yet provided a sustainable solution to the employment issue. Between the periods 2009-2013 and 2014-2018, the growth rate of job creation declined significantly, from an average of 3.46 to 3.03 respectively. The employment indicators show irregular values from one year to the next. For example, the participation rate, the occupation rate and the job creation rate fell between 2018 and 2019, reflecting an increase in the unemployment rate over the same period of 1.8 percentage points. On the other hand, the economic achievements resulting from the first phase of the PES have led to a significant improvement in living standards, with average GDP per capita increasing by a factor of 1.12 between the pre- and post-implementation periods. This increase also implies a reduction in poverty. Between 2011 and 2018/2019 (the year of the latest Household Living Conditions Survey), there was a significant decline in poverty according to the national threshold. The incidence of poverty fell from 42.8% to 37.8%, i.e. by 5 percentage points. This drop in poverty was also observed in all geographical strata, with the capital Dakar recording the greatest reduction.

Cameroon's strategic framework is based on the *"Cameroon 2035 Vision"*. The first phase of this vision was operationalised over the period 2010-2019 through the Growth and Employment Strategy Paper (GESP). The objectives of the DSCE were to: (i) increase growth to about 5.5% on average per year during the implementation period; (ii) reduce underemployment from 75.8% to less than 50% with the creation of tens of thousands of formal jobs per year over the next ten years; (iii) reduce the monetary poverty rate from 39.9% in 2007 to 28.7% in 2020. Since the year 2020, the Cameroonian government has a new framework for the operationalisation of the Vision, namely: the National Development Strategy 2020-2030 (NDS30). This strategy is based on the lessons learnt from the implementation of the DSCE, which it has taken over until 2030, with a view to achieving the objectives set for the 2035 horizon. The NDS30 aims to proceed with the structural transformation of the economy by making fundamental changes to economic and social structures in order to promote endogenous, inclusive development while preserving the opportunities of future generations. At the economic level, the country's overall development falls short of the desired performance. Indeed, for several decades, the Cameroonian economy has been in a growth dynamic marked by phases of acceleration and slowdown. Over the 2010-2019 period, corresponding to the first phase of implementation of the Cameroon 2035 Development Vision, operationalised by the DSCE, the growth rate averaged 4.3%, 1.2 points below the target.

Figure 5: Cameroon's economic growth rate between 2004 and 2019



Source: Cameroon case study

During this period, growth was fostered by the implementation of a number of projects (hydroelectric dams, deep-water ports, roads, motorways, etc.), which also substantially strengthened the country's infrastructure. On the other hand, the various economic (drop in oil prices) and security crises (terrorist attacks in the Far North region, the presence of armed gangs in the Eastern region bordering the Central African Republic, socio-political instability in the North-West and South-West regions) that the country has faced are among the factors behind the slowdown in activity observed at certain times.

On the social front, several key indicators in areas such as health and education have improved in recent years, despite a general context of endemic poverty, rising inequality and increased underemployment. For example, life expectancy at birth has increased from 51.4 years in 2009 to 58.9 years in 2019. The risk of a child dying before the age of five fell by 43 points between 2011 and 2018. In 2018, the risk for a child born alive to die before his or her first birthday is estimated to be 48‰ and the risk of dying between 1 and less than 5 years is 33‰. In addition, the maternal mortality ratio decreased from 782 in the period 2004-2011 to 467 in the period 2011-2018. This value is close to the national target set in the first phase of Vision 2035 at 350 per 100,000 live births in 2020. In the environmental field, concerns related to climate change are becoming increasingly acute, with effects on both the economic level (particularly through constraints on agricultural production) and the human level (in the context of the health and living conditions of the population).

In terms of governance, several actions aimed at establishing an incentive framework for investment have been carried out. However, their scope is still below the level expected to achieve this objective.

Since 2010, **Gabon'**s economic development policy has been based on the implementation of the *Emerging Gabon Strategic Plan (PSGE)*. This plan sets out the guidelines laid down by the President of the Republic for the conduct of public policies aimed at making Gabon an emerging country by 2025, based on three pillars *(i) Industrial Gabon, developing industrial capacities, particularly in the hydrocarbons, mining and metallurgy sectors; (ii) Green Gabon, strengthening the timber, agriculture, livestock and fisheries sectors; (iii) and Services Gabon, promoting tourism and financial services. The implementation of* the PSGE, which began in 2009, was planned in three main stages: (a) *the establishment of the foundations for emergence (2009-2016)*, focused on the diversification of the national economy through the processing and local valorisation of primary products (wood, manganese, etc.) as well as the reconquest of the domestic market in local food products and the development of a competitive service economy based on the digital economy. It also aimed to strengthen the national territory in terms of infrastructure to support economic and social development and ensure the opening up of the provinces, the strengthening of the national solidarity of the social protection programme, the promotion of social housing, and the development of youth employability; (b) *Acceleration of growth (2016-2020) focusing on strengthening the diversification and competitiveness of the economy. This* is a programme of equal opportunities to sustainably reduce inequalities and the sustainable pursuit of natural resource management and the construction of a green economy; and *(c) emergence (2020-2025)* resulting in the convergence of the standard of living of Gabonese people towards that of the most advanced countries; guaranteed inclusive and sustainable development and a prosperous and fully diversified economy. Thus, the sharing of the fruits of prosperity was to be reflected in particular by: quality health services for all, universal access to drinking water and sanitation services, access to decent housing for all and access to employment and the fight against exclusion.

The government's economic policy in 2019 was based on the continuation of the three-year Economic Recovery Plan (ERP) and the implementation of measures to consolidate public finances.

Thus, before the outbreak of the coronavirus pandemic, the country's economic situation was improving. The country's economy grew by an average of 4.1% over the 2010-2019 period. Despite the efforts undertaken since 2010, the population's expectations remain high. In an effort to respond to all concerns, the government devoted 10% of the state budget to health and social protection in 2019, with a particular focus on strengthening

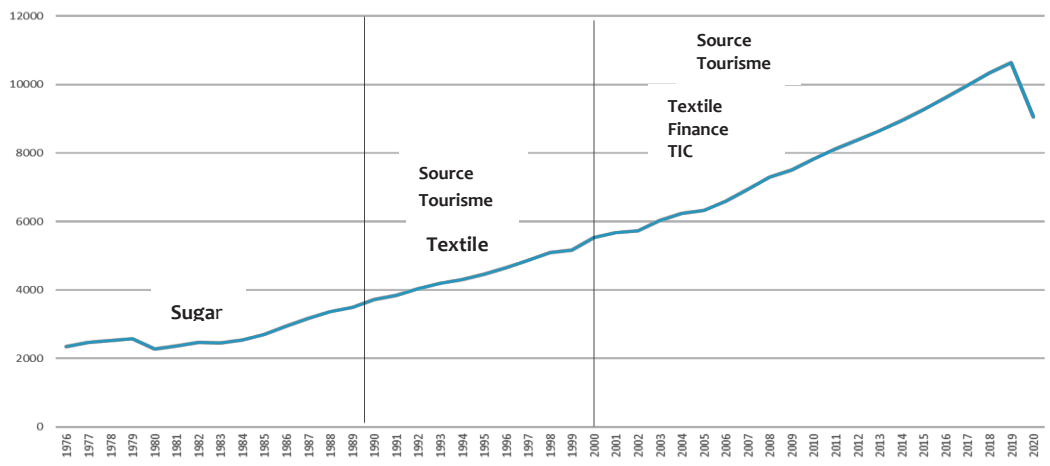
health structures and continuing the social actions begun in 2018. Efforts noted in the areas of prenatal care, vaccination coverage, acute respiratory infections, the fight against HIV/AIDS and tuberculosis, etc. should be strengthened, as Gabon is still lagging behind other countries with similar incomes. In addition, the issue of unequal access and quality of care throughout the country remains, especially in rural areas.

Concerning education, disparities are noted in terms of access according to social level. Indeed, the available data reveal that 90% of the rich have access to education against 77% for the poor. At the rural level, the rich class have access to education compares to ¾ of the poor.

As for the labour market, Gabon is characterised by a low employment rate estimated at 42.6% in 2019, compared with 39% in 2005, a relatively low level compared with the average for other African countries where the presence of the informal sector is much more pronounced. This level is one of the factors explaining the high rate of unemployment (20%), which particularly affects young people (35%). This unemployment is particularly visible in urban areas, where 75% of the population lives, 50% of whom live in Libreville.

The trajectory of **Mauritius** since its independence in 1968 is another African example of successful economic diversification. Historically, Mauritius' economy was mainly supported by sugar cane cultivation.

Figure 6: Evolution of GDP per capita (constant 2015 base) in Mauritius



Source: WDI, World Bank

From the 1990s, the Mauritian economy consolidated on new growth engines such as beach, medical and business tourism as well as textiles. This has resulted in a significant increase in the level of GDP per capita (see Figure 6).

From 2000 onwards, the main growth engines in place were showing signs of slowing down. While sugar's contribution to the national economy, both in terms of employment creation and value added, had been declining since the 1980s, garment manufacturing also experienced a slowdown. The main challenge facing Mauritius in the late 1990s was the same as that faced at independence in 1968 and again in 1980: how to reduce unemployment, which stood at 8.2% in 2003 and had been rising steadily since the end of the previous decade. The country has therefore embarked on a new phase of transformation with an economic model based on the promotion of new service sectors and the opening of the economy to foreign talent and skills. The key sectors of this strategy are the blue economy and the green economy, respectively devoted to the exploitation of the country's rich maritime diversity and the preservation of the environment. Other major services have been progressively developed, notably information and communication technologies (ICT) and financial services, which have strongly changed the productive structure of the country and contributed to generate several jobs between 2000 and 2010[13]
.

However, the Mauritian economy began to slow down in 2010 due to the global recession, which led to weak sugar and textile exports, a decline in the construction sector and lower margins in the tourism sector. Although ICT and financial services continued to grow, they were not able to absorb the unemployment generated by the traditional economic sectors. As a result, unemployment rose to 7.6%, which put additional pressure on the government to fund business restructuring efforts and to provide temporary unemployment benefit and a youth employment programme to facilitate their integration into the new growth sectors.

As early as 2015, Mauritius' vision was reaffirmed through the new government's economic roadmap, *Achieving the Second Economic Miracle and Vision 2030*. This strategy aimed to create 100,000 new jobs over the next five years in 10 sectors of the economy through major investment projects, such as the "Smart City Scheme", which aims to provide investors with an enabling framework and incentive package for the development of smart cities across the country.

[13] Indeed, while ICT contributed only 4.1% to GDP and employed 4,360 people in 2000, it accounted for 6.5% of GDP in 2010 and contributed to almost 12,826 jobs in 2010, an increase of 8,000 jobs (Statistics Mauritius, 2021). Similarly, the financial services sector created about 5,000 additional jobs, up from 6,715 in 2000.

The Mauritian economy is now considered one of the most dynamic economies on the continent and has seen the emergence of a growing middle class with a GDP / capita of $ 9,061.3 (in constant 2015 US dollars) in 2020 according to World Bank data.

Development planning in **Nigeria** has three main dimensions, namely: (i) long-term planning (10-year development vision and plan) which sets out the government's overall vision for the country, (ii) medium-term planning (five-year development plans) which builds on the government's policies, initiatives, programmes and projects and serves as a guide for economic management and the budgetary process in the short to medium term, and (iii) short-term planning (annual budgets or plans) which sets out intermediate milestones to be achieved in a shorter time frame and is coherent with the overall policy, e.g. the annual budgets.

Over the past decade, Nigeria has produced five key development plans and is currently working on two pending plans: i) Nigeria Vision 20:2020 or NV:20 : 2020, which covers the period 2009-2020; ii) 1st National Implementation Plan 2011-2013; iii) Transformation Agenda 2011-2015; iv) Recovery and Growth Plan 2017-2020; and v) Economic Sustainability Plan, 2020 (focusing on post-COVID-19 recovery). The two documents being finalised are the National Medium Term Development Plan 2021-2025 and the Agenda Nigeria 2050 which will succeed the NV 20:2020 plan. These development plans are aimed at accelerating Nigeria's economic growth rate, structural transformation and improving the living standards of the Nigerian people.

Overall, the implementation of Nigeria's development plan for emergence has had limited success.

The Recovery and Growth Plan 2017-2020 prioritises structural economic transformation through industrialisation, infrastructure development and inclusive growth. Overall, the plan aimed to lift the economy out of recession and place it on a sustainable growth path, by increasing national productivity and achieving sustainable diversification of production to grow the economy significantly and achieve maximum welfare for citizens, starting with food and energy security.

The implementation of this plan has boosted economic growth from -1.6% in 2016 to 2.2% in 2019, while inflation has decreased from 18.33% in October 2016 to 11.61% in October 2019. The industry and services sectors, which recorded a declining value added in 2016, have particularly experienced a positive growth rate in 2019: on average, industry (which accounts for about 22% of GDP) has increased by 2.31%, and services (which account for about 53% of GDP) have increased by 2.22% in 2019.

The challenges to Nigeria's emergence are numerous but not significantly different from those faced by many other African countries. Primarily, heavy dependence on commodities whose prices are subject to high volatility is holding back progress. In the case of Nigeria, its heavy dependence on volatile crude oil revenues has been the main constraint to economic, social, political and environmental development.

In **Morocco,** in the absence of an integrated economic and social development plan, Morocco's emergence strategy since the 2000s has been based on sectoral strategies aimed at improving the functioning of the Moroccan economy and leading to shared prosperity.

In industry, the Emergence Plan (2005-2015) aimed to create a strong and competitive industry, capable of better integrating into global value chains. This was complemented by the Industrial Acceleration Plan (PAI) (2014-2020) and the Industrial Recovery Plan (2021-2023). The PAI has made it possible to modernise the Moroccan industrial fabric, by accelerating the establishment of new global businesses (automotive, aeronautics, offshoring, etc.), in integrated ecosystems, equipped with modern infrastructure and simplified procedures. In addition, in order to promote the cultural wealth and traditional sectors of the craft industry, the country has adopted the Vision of the Craft Industry 2015, which aims to improve the conditions of the Moroccan craftsman and to generate an exportable cultural offer.

In agriculture and fisheries, the Green Morocco Plan, launched in 2008, aimed to modernise the agricultural sector, focusing on the adoption of physical capital, the improvement of production systems, the development of a competitive exportable offer and the improvement of living conditions for small farmers. This programme was complemented in 2020 by the second phase, the Green Generation Morocco strategy (2020-2030), which emphasises the development of efficient agricultural organisations and an agricultural middle class, and focuses on rural youth through the need to develop human capital. The Halieutis Plan (2010-2020) aims to better develop and sustainably manage Morocco's fisheries resources.

The tourism sector, another pillar of the Moroccan economy, has benefited from Vision 2020 to establish Morocco as a tourist destination of choice. With a contribution measured at 7.1% of GDP in 2019, the tourism sector is one of the hubs of the services industry and remains one of the main providers of employment in Morocco. The economic crisis has hit it hard, given the restrictive measures necessary to slow the progression of successive waves of the pandemic.

Morocco has also positioned itself in the renewable energy (RE) sector through the National Energy Strategy 2030, which aims to increase the share of renewable energy in the energy mix to 42% in 2020 and 52% in 2030. The aim being

to improve the energy efficiency of the Moroccan economy and to establish the Kingdom as a regional champion in the RE sector. This Moroccan solar plan has notably contributed to the creation of the Noor solar power plants in Ouerzazate and, soon, in Midelt.

Finally, with its expertise in the field of infrastructures, Morocco has equipped itself with a port infrastructure and logistics platforms of international standards, through the creation of the port of Tangier-Med, by means of a dedicated legislation and a unique administrative and legal arsenal. Today, this port has established itself as a hub in the Mediterranean.

Overall, these strategies have enabled Morocco to modernise its productive structure by installing new industries with higher added value and to modernise the agricultural sector. They have also enabled Morocco to improve the overall business environment. However, the lack of an integrated vision between the different sectoral plans, the insufficient coordination between the different stakeholders and the weak recourse to ex-post evaluations have often led to results that fall short of the objectives previously set.

Since 2010, **Madagascar**'s strategic framework has been supported by three key instruments: (i) a crisis exit roadmap, drawn up in 2011 after the 2009 political crisis that led to the ousting of the regime in place. The main objective of this roadmap was to lead the country towards free and democratic elections; (ii) a National Development Plan (NDP) covering the period 2014-2018 with the vision of "Madagascar: a Modern and Prosperous Nation" and the central objective of achieving economic growth of at least 10% from 2018. This plan is structured around five strategic axes: Governance, rule of law, security, decentralisation, democracy and national solidarity, Preservation of macroeconomic stability and support for development, Inclusive growth and territorial anchoring of development, Adequate human capital for the development process, and Valorisation of natural capital and strengthening of resilience to disaster risks; and (iii) a declaration of General State Policy, based on the concept of emergence, established in 2019 and covering the period 2019-2023. It is a translation of the priorities outlined in the manifesto "Initiative Emergence Madagascar" (IEM), announcing the main orientations of the current President's programme. The ambition of the EMP is to make up for the development delay accumulated over the 60 years since independence and to "build a strong, prosperous and united nation for the pride and well-being of the Malagasy", by taking an emergence path. It is articulated around 13 "velirano" (solemn commitments) which translate "the priority axes and results expected by the population" and which "must be implemented as soon as possible". A plan called "Plan Emergence Madagascar" (PEM) is currently being finalised to translate these 13 "Velirano" into a programme of prioritised and budgeted actions.

In line with the "Velirano", a Multisectoral Emergency Plan (MSEP) was put in place in April 2020 to address the COVID-19 crisis, with a threefold objective of (i) containing the spread of the coronavirus and containing the pandemic, (ii) assisting vulnerable populations and effectively addressing the vital needs of the population, the challenges of reducing poverty, vulnerability and insecurity, and (iii) protecting the economy, maintaining human capital and facilitating recovery.

The implementation of the National Development Plan (NDP) 2014-2018 took place in a decongested political context after the political crisis of 2009-2013. Thanks to the consolidation of institutional stability following the political reforms undertaken from 2014, the country experienced relative macroeconomic stability over the period. Activities were revived, inflation was brought under control and public accounts were consolidated. This was accompanied by a significant improvement in human development indicators.

Despite this progress, the country still faces the challenge of accelerating growth, as well as that of making growth more inclusive and more conducive to the creation of decent and well-paid jobs. Indeed, even if the economic growth rate was positive (around +3.5%) for the period, it struggled to exceed the demographic growth rate (estimated at 3.01% at the time of the RGPH3) and remained characterised by significant inequality.

The 2019-2023 General State Policy (GSP) intends to correct this situation and put the Malagasy economy on the path to emergence. The economic performance achieved from the start of the period is an illustration of this. In 2019, economic growth has indeed rebounded significantly, reaching a rate of +4.4%, and inflation has decelerated significantly, from a rate of around 8% in 2017 and 2018 to a rate of 5.6% in 2019. However, the implementation of the EMP was severely disrupted by the Covid-19 health crisis, which broke out in the first quarter of 2020.

With regard to the first EMP commitment, on peace and the effectiveness of the state, reforms are underway to improve the authority of the state, restore the security of goods and people and improve the legal security of contracts. With regard to the commitment on energy and water, initiatives have been launched to increase the country's electricity capacity in both urban and rural areas, while making an energy transition by reducing the share of thermal power in electricity production. Several initiatives have also been launched in rural areas to increase the population's access to improved sources of drinking water, and several hydro-agricultural infrastructures have been rehabilitated and new ones built, with a view to further expanding the area under irrigation. As for the commitment to health and education for all, the country has begun and intends to continue building schools and health centres known as "manara-penitra" (or to modern standards), as well as training teachers and health professionals. Regarding the commitment to the industrialisation of the country, the

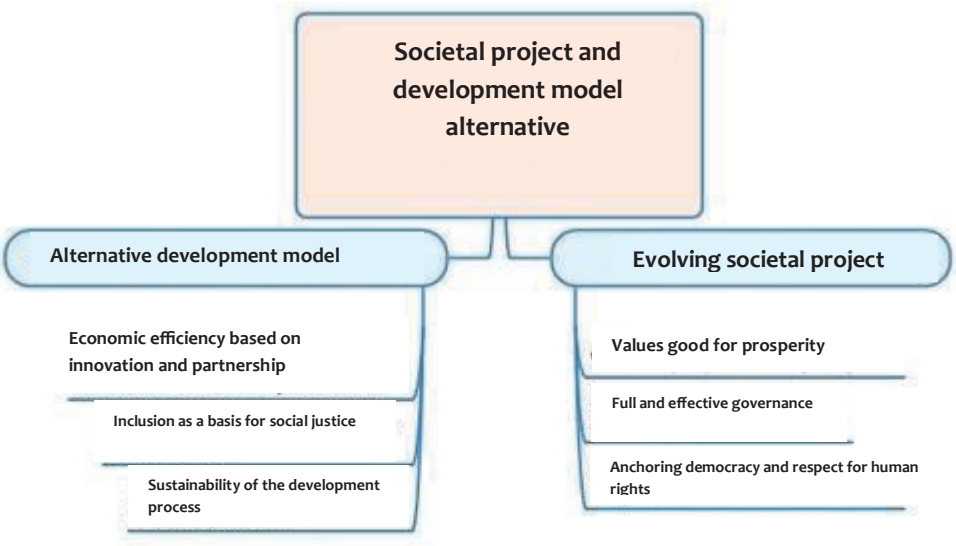
establishment of a fund for industrial development is planned, as well as the creation of large industrial parks. Regarding the commitment on tourism, the promotion of Madagascar as a destination will continue. With regard to the commitment on sustainable resource management, the country has launched a vast reforestation initiative which aims, in the long term, to restore the country to its former green cover.

Moreover, the growth prospects for 2021 (+3.5%) and 2022 (+5.4%) are very promising, thanks to the economic reforms to improve the business environment and develop growth-supporting infrastructure and the efforts to consolidate public finances to widen the fiscal space, which have been underway since 2019.

Over the past decade, **Tunisia**, like many developing countries, has embarked on stabilisation and adjustment programmes aimed at correcting macroeconomic imbalances in the economy. Reforms have been thought out, studied and implemented under the impetus of the will for change after the 2011 revolution, a growing contribution from civil society and the support of the international community for the success of its democratic and economic transition.

Since the 1960s, Tunisia has embarked on a path of development planning, drawing up and implementing several five-year development plans. The first National Development Plan (NDP) covers the period (1962-1964) and the latest NDP has been prepared for the period (2016-2020). One of the main features of the latest NDP 2016-2020 is the adoption of a participatory approach during all stages of the plan presenting a new vision for Tunisia's emergence. The objective was set to achieve an evolving societal project and an alternative development model. This societal project and alternative development model (see figure 7) supports Tunisia's effort in its democratic transition and economic emergence on the one hand, and reinforces the inclusion of the 2030 Agenda in its development strategy with new values conducive to development and prosperity.

Figure 7: Tunisia's societal project and alternative development model



Source: Tunisia case study, UNDP

In terms of the impact brought about the implementation of the 2016-2020 NDP, the average growth rate recorded was below expectations. Indeed, the growth rate averaged 1.7% over the period 2016-2019, compared to the forecast of 3.5%. This low growth rate is mainly due to political instability, difficulties in the phosphate and oil sectors (work stoppages, transport stoppages, strikes, etc.), terrorist attacks that undermined the tourism sector and also to weak public and private investment efforts. In 2019, the GDP growth rate is 1%. This weak performance remains insufficient to reduce unemployment, which is increasingly structural in nature. This poor performance has not enabled the creation of the expected number of jobs (320 000 jobs) nor the reduction of the unemployment rate by 3 points to 12.2%. On the contrary, unemployment has been on an upward trend and stood at 15.3% in 2019. It appears that the first years of the plan's implementation did not meet the challenge of reducing high structural unemployment. According to data from the National Institute of Statistics, net job creation represents 4.3% of the total number of job seekers and does not exceed 27,000 jobs in 2019. The level of unemployment is particularly alarming among young people, women and university graduates.

Moreover, Tunisia has always relied on its human capital, which is one of its most important assets and one of the main catalysts of its emergence. Orienting public policies towards human development is essential to fight against inequalities and promote social equity. Axis 3 of the 2016-2020 NDP focused on human development and social reforms,

which are considered important pillars for achieving the goal of economic emergence, particularly social equity. The aim is to reduce poverty and its causes and all forms of exclusion, in coordination and consultation with the various social partners.

Moreover, one of the objectives of the NDP 2016-2020 was to raise the Human Development Index (HDI) from 0.721 in 2013 to 0.772 in 2020. Tunisia's HDI was set at 0.740 in 2019, placing the country in the "high human development" category, while Libya and Morocco had HDIs of 0.724 and 0.686 respectively in the same year.

South Africa is a constitutional democracy with a three-tier system of government and an independent judiciary. The national, provincial and local governments all have legislative and executive authority within their spheres of action, and are defined in the Constitution as separate, interdependent and interrelated. The development planning process led by the South African government has three distinct time horizons. Reforms to the former South African framework for strategic plans and annual performance plans were introduced in 2015 to establish a clear guideline between long-term national planning and sectoral plans. Government policy implementation has consequently been streamlined to ensure implementation of long- and medium-term planning priorities, with mechanisms in place for appropriate oversight and accountability to support policy implementation. While planning at the national level has been complex and evidence-based, planning and implementation processes at the local level have been problematic and poor service delivery has been a consistent feature of municipal governance. The South African government has recently produced two major planning documents: the Reconstruction and Economic Recovery Plan and the District Development Model, to improve the ability of local governments to manage their resources more effectively, in line with their integrated development planning processes. The Reconstruction and Economic Recovery Plan has three pillars, including (i) initiating and sustaining a comprehensive health response to save lives and halt the spread of the pandemic, (ii) recovery and reform, and finally, (iii) rebuilding and transformation, which involves the development of a sustainable, resilient and inclusive economy.

From this review, we will retain two provisional points to which the report will return in its prospective section

a. The discourse on emergence is in some ways a continuation of the classical theory of development as it was forged at the end of the Second World War. Rostow seems to have lost little of his colour, nor his work on 'The Stages of Growth', despite his clearly assumed politico-ideological

aim for those who often think that this work was intended as an 'anti-communist manifesto'. The discourse on emergence is resolutely capitalist or, if one wants to be in the here and now, neo-liberal. By championing it, African leaders are undermining the idea that Africa rejects market-based development[14] and tend to equate it with an ideological or polemical posture rather than an empirical analysis.

b. However, with the emergence of new countries, there is a renewed interest in planning, which had a bad press during the decades of structural adjustment (1980-2000) corresponding to the triumph of neo-liberal ideology. Somewhat paradoxically, the anathema against planning is no longer appropriate in the era of emergence. Even among 'market fundamentalists', as neo-liberals are called by alter-globalists, it is understood that 'emergence is planned'[15] . Even if some of the emergence plans are more like investment programming frameworks, and thus differ little from the three-year programmes of the structural adjustment period, they signal a certain rehabilitation of planning and an acceptance of the idea that 'failing to plan is planning for failure'. Is this renewed interest in planning an influence of the SDGs? We cannot exclude this hypothesis to explain what seems to be a new appetite for the long term, whereas until recently "reactivity" and "adaptation" were the watchwords of development gurus who borrowed them from the business world. Is this semantic evolution a delusion or a ray of light? In any case, it can be read as a seed of change and, as such, a variable worthy of being taken into consideration in the elaboration of scenarios

[14] See B. Founou Tchuigouia *"Et si l'Afrique refusait le marché*? The book was intended as a response to Axelle Kabou's book *"Et si l'Afrique refusait le développement*" (*And if Africa refused development), which was* very well received by the media in the 1990s.

[15] Remarks by President Alassane Ouattara at the opening of the first edition of the ICEA in 2015

III. Situational Analysis and Assessment of the Effects of Covid-19 on the Emergence Trajectory

3.1 Typology of the COVID-19 shock

From a theoretical point of view, it should be noted that unlike recent global economic crises, such as the subgrants or sovereign debt crisis at the beginning of the decade, the crisis caused by the COVID-19 pandemic is a triple shock, affecting both supply and demand in the real sector, as well as the financial sector.

The first is a **negative supply shock** resulting from the consequences of the many restrictive measures taken by governments to contain the spread of the disease. These measures included travel restrictions, global border closures, widespread teleworking in several industries, limitations on working hours, curfews, and partial or total shutdowns of businesses in certain sectors (restaurants, hotels, entertainment, sports, and transportation), all of which disrupted both production and supply chains, resulting in a major downturn in economic activity. This has resulted in significant business losses in the affected sectors, which have not been offset by the revival of other areas such as telecommunications and the financial sector.

Because of the interconnectedness between sectors in different economies, this impact has spread throughout the global economy, either through quantity disruptions or through price effects following waves of shortages. As a result, companies that are well integrated into global value chains were quick to feel the impact of production cuts, especially from China, given the country's key role as a producer of intermediate goods, mainly in IT, electronics, pharmaceuticals and transport equipment, but also as the world's largest buyer of raw materials.

The second **negative shock affected the demand side**, affecting several economic sectors. Containment measures in the affected countries, cancellations of cultural and sporting events, and a drop in external demand, particularly from China and certain other world economic powers, have had repercussions on the entertainment industry (transport, tourism, restaurants, etc.) and the purchase of goods and services, particularly in the manufacturing sector. The short-term impacts can be differentiated by sector: declines in activity in some sectors may be offset in the future (purchases of durable goods), while some other losses in activity are irreversible. These events have resulted in lower consumption and investment and higher public debt levels.

The third **shock is financial**. It stems from the growing uncertainties leading to a decline in consumer confidence and a rise in risk aversion in financial markets. As a result, financing conditions tightened globally, leading to a decline in the distribution of credit, which exacerbated the effects of the crisis.

An important dimension to consider is the uncertainty about the duration of the crisis and the question of the adaptation of public policies. This concern is particularly linked to the successive waves of the disease, due to the emergence of new variants that threaten to undermine or call into question the economic recovery expected in the short term.

From the above, it is clear that the health-related economic crisis is complex and makes the effective implementation of development and emergence plans even more uncertain.

3.2. Main transmission channels of the COVID-19 shock

The COVID-19 crisis spread to the different economies through several transmission channels, the main ones being described below:

i. **Trade:** A slowdown in production in the affected countries, particularly in China and the major developed countries, due to the containment of their populations and the closure of land and air borders, has had a negative effect on commodity exports for several emerging and developing countries in the short and medium term, thus weakening the production chains in these economies;

ii. **Direct Foreign investment (FDI)**: FDI has increased particularly in emerging and developing countries in recent years, especially in the construction, mining and hydrocarbon sectors. An economic slowdown in key partners has affected the successful implementation of ongoing projects and delayed the effective start of new growth-enhancing projects in the countries;

iii. **Tourism and hospitality:** Tourism and hospitality, a major source of resource inflows in most emerging and developing economies, has been adversely affected by the decline in international travellers;

iv. **Air transport:** The cancellation or limitation of travel to and from countries affected by the coronavirus has been a source of weakness in the air transport sector, and in many other

key sectors in the economies. Similarly, decisions by affected countries to close their air links with affected countries have also been a constraint on them;

v. **Migrant remittances:** The confinement in the main affected countries has affected migrants' incomes and their remittances to the crisis-affected countries;

vi. **Public finances:** The treatment of coronavirus patients required significant resources, which led to a deterioration in the situation of public finances, following the increase in health expenditure. In addition, the paralysis of the productive apparatus has led to a decline in tax revenues;

vii. **The banking and financial sector:** the downturn in economic activity linked to the coronavirus led to a drop in credit to the economy and difficulties in repaying loans by companies and individuals. In particular, the banking sector was confronted with liquidity difficulties in order to meet various demands that could result from precautionary behaviour by economic operators.

The obstacles noted in these main transmission channels eventually led to difficulties in supplying markets, particularly with basic necessities, linked to the building up of security stocks by actors anxious to protect themselves against possible shortages resulting from the movement restriction measures.

In summary, and referring to P. Jacquemot who devoted a good article to the impact of the pandemic, sub-Saharan Africa faceď "a triple shock".

The first trauma of the pandemic is clearly human. It has been less severe than predicted by agencies such as the United Nations Economic Commission for Africa (UNECA), which estimated that between 300,000 and 3,300,000 Africans could die as a result of Covid-19, depending on the measures taken to halt the spread of the virus. Similar figures were put forward by bilateral cooperation agencies, one of which went so far as to predict a 'pangolin effect'.

The vulnerability of the continent, the agencies argued, is that more than half of the urban population is concentrated in precarious and overcrowded neighbourhoods where a certain misery prevails that is "impossible to put on confinement". With its open markets, religious gatherings, crowded transport, precarious dormitory neighbourhoods... All these are hotbeds of contamination. According to UNICEF, some 258 million people - do not have nearby access to a place to wash their hands. Under these conditions, it is difficult to fight against "community transmission" and to apply the social distancing measures and hygiene rules that are now repeated over and over by

the authorities. Fortunately, the health disaster has not reached the extent feared and/or announced since, to date, the loss of human life due to COVID for the whole continent is barely more than that recorded in Italy alone, without experts being able to explain what appears to be a surprising resilience of the continent, following the example of the one it had already shown in the face of the H5N1 (avian flu (bird flu)) and Ebola epidemics, which were also the subject of massive disaster predictions.

The second trauma relates to economic activity. Confinement, curfews, workplace closures, mobility restrictions, disruption of supply chains and labour shortages due to the disease have disrupted production. At the same time, lower incomes, fear of contagion, loss of confidence and increased uncertainty have been factors reducing demand. Tourism and transport are particularly affected, as well as the wider cultural industries.

Unemployment and the economic slowdown have also affected migrant workers and reduced their remittances. According to the World Bank, remittances to low- and middle-income countries would have fallen by 7.0% in 2020 to US$508 billion after reaching US$548 billion in 2019, higher than foreign direct investment flows (US$534 billion) and overseas development assistance (about US$166 billion)i . This decline would reach 8.8% in Sub-Saharan Africa to $44 billion from $48 billion in 2019. It would continue in 2021 at -5.8% to $41 billion16 . According to the African Development Bank, remittances to the continent as a whole fell from $85.8 billion in 2019 to $78.3 billion in 2020. This decline, the steepest in recent history, is largely attributed to a decline in the wages and employment of migrant workers, who are often particularly vulnerable to income and job losses in the event of an economic crisis in their host country.

Contagion containment strategies resulting in slowdowns or blockages of local and regional trade have increased transaction costs. Border closures are likely to disproportionately affect the poor, especially agricultural workers or unskilled labour in the informal sector.

Sub-Saharan Africa has also faced severe external shocks, including a shock to trade and the tightening of global financial conditions, to which countries in the region have been exposed to varying degrees. On the trade side,

[16] Migration Data Portal, Global Migration Data Analysis Center (GMDAC), IOM

a sharp slowdown in the growth of major trading partners reduces external demand while disruptions in supply chains have reduced the availability of imported goods and may have generated inflationary pressures.

The sharp fall in commodity prices is a further shock to resource-rich countries in the region, further exacerbating the impact of the pandemic. The terms of trade shock has weighed on growth and increased fiscal and external vulnerability, but more importantly, low commodity revenues have significantly reduced the resources of these countries to combat the epidemic and sustain growth. For example, the price of a barrel of Brent crude oil fell by an average of 34.4% to $42 in 2020, compared with $64 in 2019.

3.3 African countries' response to COVID is organised locally

The African response to the pandemic was prepared and organised, taking into account the particularities of the continent (insufficient equipment, difficulties in implementing strict containment measures, immediate loss of household income, difficulties in supplying towns). Although some strong physical measures have been taken[17] as in Rwanda (see Box 1), the top priority has been to increase health spending to save lives and, at the same time, to put in place funding for people whose livelihoods have been disrupted. Timely and substantial assistance has been crucial, and has ranged from cash transfers and in-kind support to vulnerable households, including informal workers, to targeted and temporary support to hard-hit sectors (IMF, 2020).

In terms of economic damage, measures similar to those in industrialised countries have been put in place (tax cuts, extension of tax payment periods, exemption or deferral of social security contributions, soft loans, suspension of loan repayments, etc.). In the short term, measures have been aimed at strengthening health systems, providing cash and in-kind support to workers (formal and informal), providing cash support to viable businesses (formal and informal), and ensuring the provision of public services. Other measures to limit the impact of the pandemic on the economic situation of countries have been initiated to support households and economic activity. These include support to the most affected sectors (tourism, travel, transport, retail, etc.), cash and in-kind transfers to vulnerable groups, and tax relief for the most affected individuals and businesses.

[17] Restriction of movement, ban on gatherings, closure of schools, closure of places of worship and recreation, closure of land, air and sea borders and compulsory wearing of masks in public and private services and outdoors.

Box 1: Measures taken at the first containment in Rwanda from 21 March to 1 May 2020

- Closure of all non-essential businesses throughout the country
- Closure of places of worship
- Closure of schools and higher education institutions (public and private)
- Obligation to work from home for all employees (public and private) except those providing essential services
- Continuation of agricultural activities in preparation for the agricultural season B while respecting the instructions of the health authorities,
- Postponement of large gatherings such as weddings and sporting events and minimisation of the number of people attending funeral ceremonies (no more than 15)
- Allowing businesses and restaurants to continue, but only by offering takeaway services
- Unnecessary travel should be avoided
- A ban on travel between different cities and districts in the country, except for medical reasons or essential services
- Authorisation of the transport of food and essential goods
- Closure of land and regional borders, except for goods and cargo, as well as for returning Rwandan citizens and legal residents, who have been subjected to a mandatory 14-day quarantine at designated locations
- Encouraging the use of electronic payments and online banking where possible

Source: UNDP, Rwanda case study

The Central Bank of West African States (BCEAO) has taken a series of eight measures to support the banking system and the financing of the zone's economies. They aimed to increase the liquidity of the banking system (increase in resources injected during open-market operations, widening the scope of mechanisms for access to refinancing, etc.), to support the budgets of the States in a way that is more transparent, and to improve the quality of the banking system.), to support the state budget indirectly, in order to increase its concessional resources and to support companies that have difficulties in meeting their loan repayments. The BCEAO and the Central Bank of Cape Verde have authorised banks to grant deferrals of repayments, while the Central Bank of Liberia has suspended the rules for the classification of claims for certain sectors. The Central Bank of Sierra Leone (BSL) has established a credit line for essential goods and services. Also, to facilitate imports of such goods, the BSL has made foreign exchange available and the Central Bank of Mauritania has frozen the guarantees for the opening of documentary credits for these goods.

The Development Bank of Central African States (BDEAC) has decided to directly support the Covid-19 response programmes of CEMAC member countries (Congo, Gabon, Chad, Equatorial Guinea, CAR and Cameroon), by making 3 billion CFA francs (4.57 million euros) available to them.

In Morocco, the response to the COVID crisis has focused on fiscal policy, monetary and macro-prudential policy, and foreign exchange and external debt policy. The table below outlines the main response measures adopted by Morocco to the COVID-19 crisis.

Table 3: Summary of the main response measures adopted by Morocco to the Covid-19 crisis

Budgetary policy	Monetary and macro-prudential policy	Exchange rate policy and external debt
Mobilisation of 10 billion from the State budget to finance : Measures for households : - 2000 DHS loss of job indemnity for employees declared to the CNSS. - 800 to 1200DHS for households affiliated to RAMED and those operating in the informal sector (5.5 million beneficiary households, according to the ADB). Measures for businesses : - Deferral of tax deadlines for an extended period of 3 months. - Implementation of the "Damane Oxygène" and "Relance TPE" products, loans guaranteed by the CGC. Strengthening the health infrastructure.	Cutting the key rate by 50 basis points and the RO rate from 2% to 0%. Introduction of moratoria on the repayment of overdue bills for households and companies in difficulty, based on a turnover scale. Strengthening of financing programmes for VSBs and easing of macro-prudential constraints on banks.	Second phase of the reform of the exchange rate regime with a widening of the fluctuation bands of the dirham to +/- 5% of a basket of currencies made up of 60% of the Euro and 40% of the US dollar. Recourse to external debt: outflows on the international market, drawing on the LPL of 3 billion dollars from the IMF, 1 billion of which will be reimbursed in advance in January 2021, concessional loans from international multilateral institutions

Source: UNDP, Morocco case study

In addition, a special Covid-19 fund has been set up to ensure economic recovery through deferral of charges, guarantees and loan extensions as well as financial support to individuals up to 75% of the minimum wage. The fund was initially intended to be topped up to one billion euros. This amount was quickly exceeded after an increase in donations from private and institutional actors. The government has taken another relevant initiative in support of the informal economy (around 15% of Moroccan GDP), by setting up a platform for declaring work online or by simple SMS.

The decisions to close South Africa's borders from March to June 2020, and the resulting suspension of economic activity, had a devastating impact on the living conditions of people who were already experiencing significant inequality and socio-economic hardship. The government quickly put in place a series of social support

measures to reduce the economic impact of the restrictions, most of which were concentrated in the formal economy. The government's COVID-19 stimulus package, initially announced on 21 April, amounted to about US$26.33 billion[18] , or 10% of the economy's GDP. Support for the poor and vulnerable has been deployed through the creation of a Solidarity Fund, with resources already committed to the tune of USD 2 billion. Price ceilings have been introduced for many basic necessities and strict regulations have been put in place to prohibit unjustified price hikes. About 90% of the government's stimulus package focused on support for the health sector, assistance to municipalities for the provision of basic social services, wage protection through the Unemployment Insurance Fund, additional income support through the tax system, financial support for small and informal enterprises, and a credit guarantee scheme. About 10% of the stimulus package was allocated to social assistance, including an expansion of cash transfers or social grants, both at the intensive (the amount of each existing social grant was increased) and extensive (a new special COVID-19 "Social Relief of Distress" grant was introduced) margins, for six months from May to October 2020.

Côte d'Ivoire's response to the COVID-19 pandemic was initially reflected in the implementation of a Health Response Plan worth 95.88 billion CFA Francs aimed at limiting the spread of the pandemic, guaranteeing better care for the sick and continuing efforts to keep the population safe from contamination. Following this plan, the Government has drawn up an Economic, Social and Humanitarian Support Plan to mitigate the impact of the COVID-19 pandemic on the population and economic actors in the formal and informal sectors, and to prepare for a rapid resumption of activities once the pandemic is over. This plan is structured around business support measures, economic support measures and social measures for the population (see table 4).

Table 4: Summary of the main response measures adopted by Côte d'Ivoire [19]

Business support measures	Measures to support the economy	Social measures for the population
the suspension of tax audits for a period of three months; the deferral of the payment of flat-rate taxes by small traders and craftsmen for a period of three months;	the establishment of a private sector support fund for an amount of CFAF 250 billion, including the strengthening of support for SMEs for at least 100 billion and the establishment of guarantee funds, in order to have a leverage effect on access to credit;	the postponement, for all subscribers, of the deadlines for payment of electricity and water bills, from April to July 2020 and from May to August 2020. To this end, payment facilities are proposed to relieve the population;

[18] According to the South Africa case study figures

[19] Source: UNDP, Côte d'Ivoire case study, presentation of the Economic, Social and Humanitarian Support Plan by H.E. Amadou Gon Coulibaly, Prime Minister, Head of Government, Minister of the Budget and State Portfolio, in his statement of 31 March 2020

the deferment for a period of three months of the payment of taxes and assimilated payments due to the State as well as social security contributions, due to the cash flow difficulties of companies; a 25% reduction in the transport tax; the deferral for a period of three (3) months of the payment of the Capital Income Tax (CIT) for tourism and hotel businesses that are experiencing difficulties; Exemption from duties and taxes on health equipment, materials and other health inputs used in the fight against COVID-19 ; the cancellation of penalties for delays in the execution of public contracts and orders with the State and its branches during the crisis period; the reimbursement of VAT credits within two (2) weeks, thanks to a reduction in a priori controls and the strengthening of a posteriori controls; the continuation, despite the crisis, of the payment of domestic debt, particularly to companies in sub-sectors affected by the crisis, giving priority to invoices of less than 100 million euros in order to reach the maximum number of companies, particularly SMEs and VSEs; the reorganisation, in liaison with the Autonomous Ports of Abidjan and San Pedro, of the payment of storage fees during the period of the pandemic in order to suspend penalties and the invoicing of demurrage, i.e. the penalties due in the event of exceeding the time limits for the presence of ships.	the establishment of a specific fund to support informal sector businesses affected by the crisis for an amount of 100 billion. This measure will be perpetuated after the crisis with a simple tax system and innovative financing methods; support for the main sectors of the national economy, notably cashew nuts, cotton, rubber, oil palm, cocoa and coffee, to the tune of 250 billion; support for food, market garden and fruit production for an amount of 50 billion, including 20 billion for inputs; continuing the dialogue with the main economic actors, in particular the agricultural umbrella organisations, the cooperatives and the population, in order to improve the economic recovery as quickly as possible and in the best possible conditions for success.	the assumption of the electricity and water bills, which were to be paid in April and May 2020 by the disadvantaged, i.e. households subscribing to the social tariff for electricity and households billed only in the social bracket for water. This measure affects over one million households; the establishment of a solidarity fund worth 170 billion, with a view to financing the most vulnerable populations in the context of emergency humanitarian support, in particular by extending the scope of social safety nets; Strengthening price controls on consumer products and applying sanctions to offenders; Encouraging landlords to be flexible and to talk to their tenants; the implementation of a distance education system starting with the examination classes (5th year, 9th year and 12th year school years) being taught via television.

In Senegal, as soon as the first cases of Covid-19 infections occurred, the Government took a series of measures to prevent the health system from being overwhelmed, on the one hand, and to support households and economic activity, on the other. To this end, the President of the Republic has also created a response and solidarity fund: FORCE-COVID-19, with a target of 1,000 billion CFA Francs, or 7% of the national GDP, to combat the effects of Covid-19 on the economy and the population. To break the chain of transmission, a first series of measures were taken in the framework of a state of health emergency, decreed by the President of the Republic on 23 March 2020. These measures were accompanied by a curfew and completed by orders and communiqués from the Minister of the Interior.

At the end of the first half of 2020, easing measures were taken which also coincided with a decrease in cases of contamination. These measures included the resumption of intercity travel, the reopening of weekly markets, schools and universities, etc. In order to support the economic activity of households and businesses, the state developed and implemented an Economic and Social Resilience Plan (PRES). For example, the state has purchased food for emergency food aid. Fiscal measures are also being taken to support businesses. In addition, specific measures have been taken in favour of the sectors most affected by the crisis. Of the 1,000 billion COVID-19 force, 87.5 billion have been allocated to the most vulnerable communities at national level. Using the Single National Register, the government has set a target of 1,000 households to receive food kits. In addition, the electricity and water bills of households subscribing to the "social tranche" were partially covered by the state for one month. In the health sector, 64.4 billion euros were used to ensure the treatment of infected cases, prevention and control of infection, and communication on the risks of infection and the application of barrier measures by the population. Given the importance of migrant remittances in the Senegalese economy (10% of GDP), the Senegalese state has committed to supporting the Senegalese diaspora during this period of crisis with a budget of 100 billion CFA francs. Finally, the State of Senegal has devoted a considerable part of the PRES to measures to support the private sector. To this end, the following measures have been taken: partial remission of tax debt, an extension of VAT suspended tax exemptions, direct support to the most affected sectors, payment of debt owed to suppliers, cash flow facilities and partial coverage of revenue losses.

Other measures have been adopted in the majority of countries: they consisted in

> Provide budget support to individuals and businesses: countries should focus on measures targeted at the most affected sectors and households to alleviate cash flow problems, while ensuring transparency and accountability in the management of pandemic Covid-19-related expenditures.

Easing monetary policy to support growth: with fiscal space tight, monetary stimulus can play an important role in limiting the economic impact of the Covid-19 shock by reducing borrowing costs and providing vital liquidity to households and businesses.

preserving financial stability while ensuring adequate credit supply: Covid-19 is expected to hit banking systems across the region. The most serious threat to banks lies in their loan portfolios, as many borrowers across all sectors are facing a sharp drop in income and will therefore have difficulty meeting their obligations when due. This could lead to a sharp increase in non-performing loans in the coming months, whose share in the portfolio was already high 11% on average in 2019.

Over time, it is reasonable to expect that more elaborate strategies will be adopted to create the basis for a more robust future. For example, in the medium term, African countries will need to put in place strategies to improve the situation in terms of access to water and sanitation, investment in human capital, strengthening the efficiency of public administration and the development of intra-African value chains under the African Continental Free Trade Agreement for import substitution.

Considerable financial needs

In April 2020, the Economic Commission for Africa (ECA) produced estimates of the overall short-term needs to address the crisis. In the best-case scenario, with rapid adoption of social restraint and distancing measures, Africa would need $44 billion for testing and personal protective equipment, as well as for treatment of all people requiring hospitalization and intensive care. In the worst-case scenario, where the virus spreads without mitigation measures, $446 billion would be needed to fill the gap in medical supplies needed to fight the pandemic. More recently, in September 2021, at the 12ème plenary meeting of the 76ème session of the UN General Assembly, President Macky Sall, President of the Republic of Senegal and newly elected current Chairperson of the African Union, announced that, given the profound impact of the crisis, Africa would need additional funding of at least $252 billion by 2025 to contain the shock and begin its economic recovery. 150 billion in investments in Africa over the next few years, as part the Africa-Europe programme under the EU's Global Gateway initiative, which aims to mobilise

up to €300 billion of public and private funds by 2027 for infrastructure projects around the world.

In fact, the evolution of financing needs will depend on several factors that are difficult to anticipate and on the choices made. The countries concerned could suffer high losses of

foreign exchange reserves, see their currencies depreciate as a result of external pressures and be forced to make a severe adjustment of their current account balance by compressing domestic demand.

All these amounts are indicative. They must be assessed on a country-by-country basis. The sums released by the moratorium, or even by cancellations, are not *ipso facto* proportional to the urgent needs of each country. Consequently, the solution that should be adopted would be to put a figure on the precise needs, case by case, in terms of health on the one hand and negative economic impacts on the other (disruption of production and sharp drop in demand, fallout from the sudden slowdown in global growth and the tightening of financial conditions, and a sharp drop in commodity prices).

International aid promised

Given the nature and scale of the health and economic shock and the increased vulnerability of low-income countries, an effective response to the crisis requires rapid, comprehensive and coordinated action by all development partners: international financial institutions, the G-20, WHO, foundations, philanthropists (Nigeria's Aliko Dangote, Africa's richest man, Egyptian billionaire Naguib Sawiris, South African mining magnate Patrice Motsepe, China's Jack Ma), humanitarian NGOs, development NGOs. Substantial aid will be released.

The IMF is making $100 billion available through fast-disbursing emergency financing facilities. In addition, the poorest countries can obtain grants from the IMF's Disaster Response and Relief Trust Fund to pay off their debt to the institution.

Also involved is the World Bank, which is deploying a 1st round of emergency support operations totalling USD 1.9bn in 25 developing countries, including USD 47.7m in West Africa. The group had alreadỳ announced on 17 March that it would increase its funding against COVID-19 to USD 14bn. A larger economic programme could mobilise up to $160 billion over the next 15 months.

The Board of Directors of the African Development Bank (AfDB) on 31 March approved the disbursement of US$ 22 billion in emergency assistance to the World Health Organization (WHO) to strengthen its capacity to help African countries control and mitigate the effects of the HIV pandemic. The AfDB

is expected to unveil a financial assistance programme that will enable governments and businesses to adopt measures to reduce the economic and social impact of the pandemic.

The European Union announces that it will provide a €2.1 billion guarantee for sub-Saharan Africa.

The French Development Agency (AFD) has announced the launch of the €1.2 billion "Covid-19 - Health in Common" initiative by summer 2020 in response to the global health crisis caused by the Covid-19 pandemic. This French initiative will provide a targeted and partnership-based response to the unprecedented crisis facing developing countries. This mechanism, which complements the actions of multilateral and European donors, targets the African continent as a priority.

The Global Fund to Fight AIDS, Tuberculosis and Malaria (GFATM) is currently the best-endowed multilateral instrument. It is responsible for releasing 10% of its resources, or about €500 million, to fund part of the emergency health systems support to better protect vulnerable communities. Unitaid, which funds innovative projects that promote equitable access to health, invests in diagnostics, treatments and triage tools for respiratory diseases.

All these initiatives are supported by the African Union Commission, the WHO and some European countries such as France and Germany.

3.4 Recent socio-economic developments and the impact of the pandemic on the trajectory of emergence in the countries under review

3.4.1 Overall direct effects of the pandemic

The economic downturn has spared no continent. As a result of the combined effect of severe disruptions to domestic supply and demand and external trade, economic activity declined in 2020 in all regions of the world. According to the International Monetary Fund's estimates (World Economic Outlook, March 2021), global and regional growth trends and prospects are as follows

Table 5: Regional growth (real GDP in annual change in %)

	2019	2020	2021
Global growth	2,9%	-3,3%	6,0%
Advanced countries	1,7%	-4,7%	5,1%
Emerging and developing countries	3,7%	-2,2%	6,7%
Sub-Saharan Africa	3,1%	-1,9%	3,4%

Source: IMF, March 2021

In sub-Saharan Africa, the brutal shock of the pandemic, in a context already marked by the fragility of productive systems (weak diversification, insufficiency or non-existence of a regional integration dynamic of national economies into real value chains, strong external dependence) explains, to a very large extent, the significant drop in GDP (which fell on average from 3.1% to -1.9%).

The logical consequence of such a sharp contraction in GDP in Sub-Saharan Africa is that jobs are lost and the number of people living below the poverty line increases. This has affected per capita income, which fell by an average of 3.6% in 2020.

Table 6: Macroeconomic indicators of the countries under review

Country	Real GDP growth in %.		Inflation in % of GDP		Overall budget		Public debt as % of GDP	
	2019	2020	2019	2020	2019	2020	2019	2020
South Africa	0,1	-6,4	4,1	3,3	-4,8	-10,8	56,3	69,4
Cameroon	3,7	-1,5	2,5	2,4	-3,3	-3,3	42,3	45,8
Côte d'Ivoire	6,2	2,0	0,8	2,4	-2,3	-5,6	38,8	47,7
Ethiopia	9,0	6,1	15,8	20,4	-2,5	-2,8	57,9	55,4
Gabon	3,9	-1,8	2,8	1,3	2,1	-2,2	59,8	77,4
Kenya	5,0	-0,3	5,2	5,2	-7,3	-8,1	59,0	67,6
Madagascar	4,4	-6,1	8,6	5,6	-1,4	-4,3	38,5	46,0
Morocco	2,5	-6,3	0,2	0,6	-4,1	-7,7	65,2	75,5
Maurice	3,0	-14,9	0,5	2,5	-8,4	-11,9	84,6	96,9
Nigeria	2,2	-1,8	11,4	13,2	-4,7	-5,8	29,2	35,0
Rwanda	9,5	-3,4	2,4	7,7	-5,1	-6,2	50,2	60,1
RDC	4,4	1,7	4,7	11,4	-2,0	-2,1	15,0	15,2
Senegal	4,4	1,5	1,0	2,5	-3,9	-6,4	63,8	68,7
Tunisia	1,0	-8,6	6,7	5,8	-3,9	-10,6	71,8	87,6

Source: Regional Economic Outlook, Sub-Saharan Africa, IMF, October 2021

However, the health picture is less alarming. In health terms, the alarming figures were over 416.6 million confirmed cases worldwide and 5.8 million deaths, representing a case-fatality rate of 1.4% according to the latest information from the World Health Organisation (WHO). The recent evolution of the Covid-19 pandemic indicates that in January 2022, the world has experienced an accelerated

wave of infection by several sets of Covid-19 variants, the most recent and highly contagious of which is the Omicron variant, which has spread from South Africa.

Although it is less alarming in Africa, the progression of the pandemic on the continent remains a real source of concern. Indeed, the cumulative number of confirmed cases is 7.9 million, with 166,912 deaths recorded, i.e. a lethality of 2.1%.

The African continent has activated its vaccine strategy with a progressive deployment of vaccines in 52 out of 54 countries. According to figures from the African Centres for Disease Control and Prevention (Africa CDC), a total of 669.1 million doses of vaccine have been delivered with over 60.62% of these doses, or 403.3 million doses, already administered. The number of people fully vaccinated with both doses amounts to 12.13% of the total African population. Overall, Africa has the lowest vaccination rate, with about 17% of its population having received at least one dose. The African countries with the highest vaccination rates are Seychelles (79.66%), Mauritius (72.88%) and Morocco (62.74%).

The shock of COVID-19 has put a strain on health systems and exposed their vulnerabilities. The impact of the pandemic was firstly a decline in the uptake of health services and secondly a reduction in the capacity to manage other endemic diseases such as tuberculosis, HIV-AIDS, and malaria. More generally, the COVID-19 pandemic emergency has led to disruptions in the availability and continuity of health care and nutrition services, affecting the entire life cycle.

More globally, the Covid-19 pandemic is expected to lead to a decline in the HDI at the global level in general and in Africa in particular. The magnitude of the Covid-19 shock on the different dimensions, namely health, education and standard, could lead to the largest reversal of the human development trend since 1991.

But it is from the perspective of the economic cost of the pandemic that the impact of COVID-19 has often been analysed. Such an approach is useful but reductive because health is much more than the absence of disease.

At the ***political level, it*** is observed that, in the name of the health emergency, some governments take measures that run counter to democratic procedures for adopting regulations and, as a result, compromise the effective implementation of development plans. But, as with health, what is considered in many studies is the economic cost of restricting the movement of goods and people through curfews and travel restrictions.

These dimensions that define the scope of the study are unevenly covered and addressed in the different reports. The analyses focus essentially on the economic dimensions, the other dimensions being placed in a category called 'specific effects'. Such a distinction reveals a well-known tropism: that of emergence as primarily a structural transformation of the economy; a tropism that has a long life since this economistic conception of structural transformation was already underlying the SAPs of the 1980s and 1990s.

3.4 2 Analysis of the effects of the pandemic on countries' emergence trajectories: has the Covid-19 crisis reversed Africa's emergence trajectories?

Taking stock, let *alone* assessing the impact of an ongoing process, is always a perilous exercise because of a lack of hindsight. In the case of COVID-19, the task is made even more difficult by the fact that the virus has not yet revealed all its secrets and that there is a great deal of uncertainty as to the effectiveness of vaccination, which remains the most effective weapon for containing and stopping the spread of the virus. Predicting the end of the pandemic is therefore particularly difficult; an exercise in futility according to some.

Since the 2010s, many African countries have designed and implemented development plans whose central objective is to create the conditions for long-term sustainable growth. These plans have often been presented as leading to emergence.

The economic recession triggered by COVID-19 broke this momentum in 2020, calling into question whether national economies could be maintained on the path of sustained economic growth for almost two decades, as illustrated in the following table:

Table 7: Economic growth trends in Sub-Saharan Africa

		2018	2019	2020e	2021p	2022p	2023p
Economic Growth (%)	**World**	**3,2**	**2,5**	**-3,4**	**6,0**	**4,4**	**3,5**
	Sub-Saharan Africa	2,7	2,5	-1,9	3,4	4,0	4,0

Sub-Saharan Africa	2018	2019	2020e	2021p	2022p	2023p
Evolution of GDP/capita (%)	0,5%	0,5%	-4,5%	0,8%	1,3%	1,4%
Private consumption (% of GDP)	4,50	2,70	-3,60	1,90	2,60	2,60
Government consumption (% of GDP)	5,90	3,70	3,80	1,10	2,10	2,20
Investment Fixed	6,90	5,20	-7,70	1,70	3,30	5,70
Net FDI (%GDP)	-21,83	-27,14	-21,41	-28,93	-34,43	
Exports, GNFS4 (% of GDP)	2,40	4,60	-8,50	6,80	5,40	5,50
Imports, GNFS4 (% of GDP)	8,40	5,80	-9,20	3,10	3,40	3,50

Poverty rate (%)		32,20	34,50	34,40		
External debt (%GDP)	22,10	23,60	27,80	26,70	26,10	

Emergence has been submerged, some media outlets have reported, especially when floods or political crises in some already hard-hit countries have further darkened the landscape. However, according to the three African Emergence Index reports published to date by the African Emergence Observatory and the Research Centre on Africa and the Emerging World of the University of Montreal, the countries under review will regain and even surpass their 2019 score in terms of emergence in 2021, with the exception of four countries. This means that, without prejudging the long-term impact of COVID-19, most countries have returned to their emergence trajectory by 2021.

Table 8: African countries' overall emergence performance[20]

Rank (2021)	Country	2017	2019	2021	Rank (2021)	Country	2017	2019	2021
1	Mauritius	76,0	68,0	74,0	28	Togo	45,5	45,8	47,0
2	Seychelles	66,9	61,8	64,9	29	Nigeria	44,6	39,5	44,6
3	South Africa	65,9	62,7	63,3	30	Zimbabwe	44,2	44,0	44,4
4	Cape Verde	63,2	57,7	61,8	31	Madagascar	43,9	44,3	44,4
5	Botswana	63,9	60,3	60,9	32	Burkina Faso	46,0	45,9	43,7
6	Tunisia	61,3	55,2	59,9	33	Comoros	46,2	46,1	43,3
7	Morocco	62,1	54,6	59,4	34	Mozambique	44,4	43,6	43,7
8	Ghana	59,8	55,5	58,5	35	Sierra Leone	43,2	45,5	43,5
9	Namibia	59,3	55,1	57,2	36	Ethiopia	42,3	45,3	42,8
10	Senegal	56,0	51,5	56,2	37	Libya	42,8	41,4	42,8
11	Egypt	57,8	53,1	55,6	38	Mauritania	42,8	38,1	42,7
12	Rwanda	54,3	56,2	52,7	39	Cameroon	44,3	42,5	41,8
13	Sao Tome and Principe	53,0	54,4	52,6	40	Congo	43,4	42,6	41,6
14	Algeria	53,7	51,6	52,4	41	Equatorial Guinea	43,6	36,4	41,5
15	Kenya	53,9	48,9	52,1	42	Liberia	44,1	46,0	40,1
16	Benin	51,9	47,8	51,8	43	Niger	41,8	39,3	39,9
17	Gambia	46,9	44,2	48,6	44	Guinea	40,6	38,5	39,7
18	Gabon	50,1	47,9	48,2	45	Burundi	39,7	44,2	38,0
19	Zambia	51,4	49,0	47,8	46	Angola	39,0	35,4	38,4
20	Uganda	49,1	53,0	47,7	47	Sudan	36,6	34,6	36,8
21	Malawi	47,9	47,6	47,5	48	Guinea-Bissau	34,9	37,2	35,8
22	Djibouti	48,0	46,2	47,1	49	RDC	34,6	38,6	33,0
23	Eswathi	48,5	41,5	47,0	50	RCA	32,2	33,3	32,3
24	Tanzania	49,4	49,0	46,9	51	Eritrea	31,4	35,2	34,6
25	Lesotho	50,3	46,3	46,9	52	Chad	30,6	28,8	30,1
26	Côte d'Ivoire	46,7	42,6	47,1	53	South Sudan	27,6	23,9	25,6

[20] Scores are expressed on a scale of 0 to 100, with 100 being the best and 0 the worst

27	Mali	46,5	44,4	44,3	44	Somalia	26,4	15,6	23,9

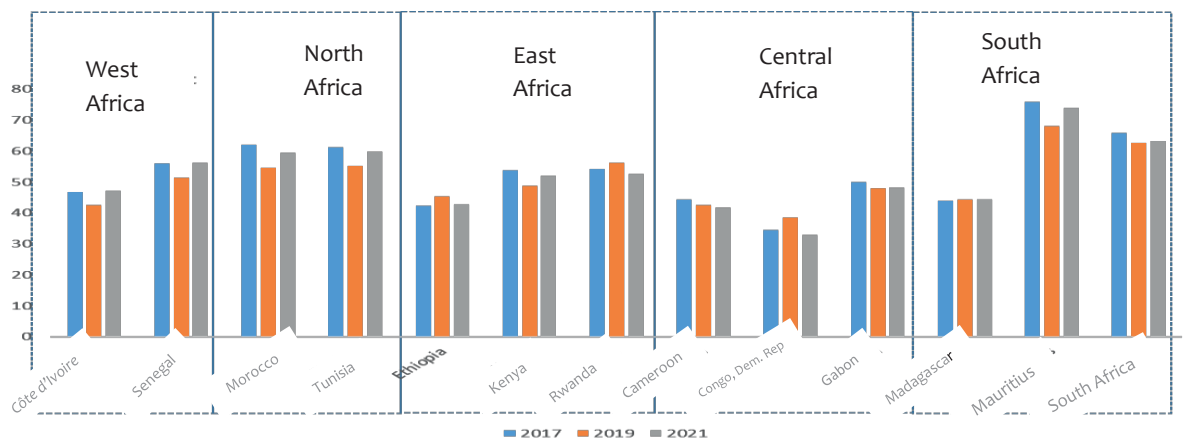
The colours represent the groups obtained by calculating the quintiles of the sample of 54 countries on the continent. Dark green: top quintile; light green: 4th quintile; yellow: 3rd quintile; orange: 2nd quintile and red: bottom quintile

Source: Africa Emergence Index, 2017, 2019, 2021, Mamoudou Gazibo and Olivier Mbabia, Research Center on Africa and the Emerging World (PRAME) and Observatory of Emergence in Africa (OBEMA), Université de Montréal

As Table 8 shows, five of the fourteen case study countries are among the top quintile of countries: Mauritius (74.0), South Africa (63.3), Tunisia (59.9), Morocco (59.4) and Senegal (56.2). If we consider the countries with an average overall score above 50, this number would rise to 8, with Rwanda, Kenya and Gabon. Only the Democratic Republic of Congo, with an overall average score of 33.0, is in the bottom quintile, which is mostly composed of countries that are experiencing or have experienced conflict and security situations.

The graph below shows that countries in Southern Africa seem to be the most advanced in the emergence process, followed by North Africa and West Africa. The countries of Central Africa seem to be the most backward.

Figure 8: Overall performance of African countries in the emergence of the countries under review



Source: Observatoire de l'émergence en Afrique (OBEMA)

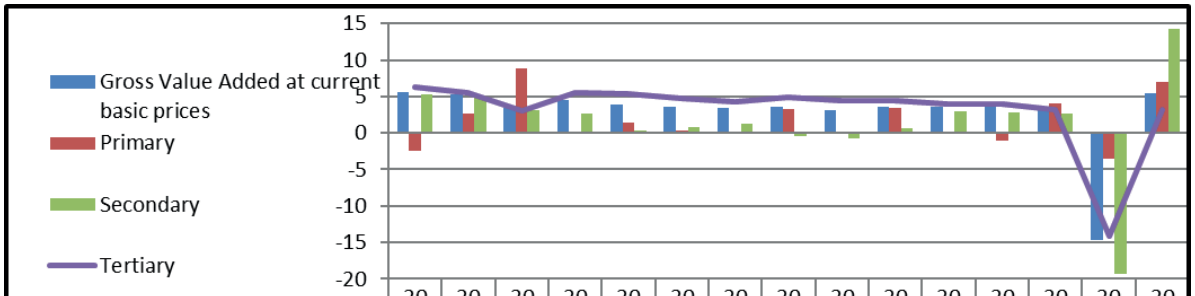
Considered an emerging country**, Mauritius was** classified in July 2020 by the World Bank as a high-income country with a GNI per capita of USD 12 900 (World Bank, 2020), thus becoming the second country on the continent after the Seychelles to join the group of high-income countries.

Of all the countries under review, Mauritius suffered the largest decline in economic growth (17.9%) between 2019 (3.0%) and 2020 (-14.9%), whereas up to 2019, Mauritius'

economic transformation was still on a steady trajectory, even though the average GDP growth rate remained below 4%.

All sectors of activity have been negatively impacted by the pandemic and the measures taken at global and national level to contain it. The secondary sector has been most affected with a negative growth rate of 19.3% in 2020, followed by the tertiary sector with a negative growth of 14.1% and the primary sector, the least affected, with a negative growth of 3.5%.

Figure 9: GDP growth rate (%)



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Gross Value Added at current basic prices	5,6	5,3	3,4	4,5	3,9	3,6	3,4	3,6	3,1	3,6	3,6	3,6	3,2	-15	5,4
Primary	-2,5	+2,6	+8,9	0,0	+1,4	+0,4	+0,1	+3,2	0,0	+3,5	-0,1	-1,1	+4,1	-3,5	+6,9
Secondary	+5,4	+5,2	+3,1	+2,7	+0,3	+0,9	+1,3	-0,5	-0,7	+0,6	+2,9	+2,8	+2,7	-19,	+14,
Tertiary	+6,3	+5,5	+3,1	+5,5	+5,3	+4,8	+4,3	+4,9	+4,4	+4,4	+3,9	+4,0	+3,2	-14,	+3,1

Source: Assessment of the Impact of COVID-19 on the trajectory for Emergence in Mauritius: Resilience and Lessons Learned Case Study Prepared for the 4th Edition of the International Conference on the Emergence of Africa

The increase in public spending to support businesses and individuals has had an impact on the country's fiscal performance. The budget deficit as a proportion of GDP has risen to 11.8% in 2019/2020, whereas it had always been in a stable range of 3% to 3.5% until 2018.

FDI inflows fell in 2020 by 36.3% to Rs 14.2 billion, while they had grown steadily from Rs 2.8 billion in 2005 to Rs 22.3 billion in 2019.

In terms of outlook, GDP growth projections are 5.0% in 2021 and 6.7% in 2022. However, this performance will depend on certain

external and internal conditions: the return of dynamism in the main export markets, the acceleration of the recovery of the tourism sector, foreign investment flows and the

implementation of economic infrastructure projects (land, port and airport transport and social; water storage capacity, distribution structures and flood management systems, renewable energy, social housing and community development) retained in the PSIP.

Mauritius' pre-pandemic economic situation was already calling for policies to achieve higher growth in order to move to and maintain its status as a high-income economy as its economic growth rate continued to stagnate and many sectors had not grown at desired or expected rates.

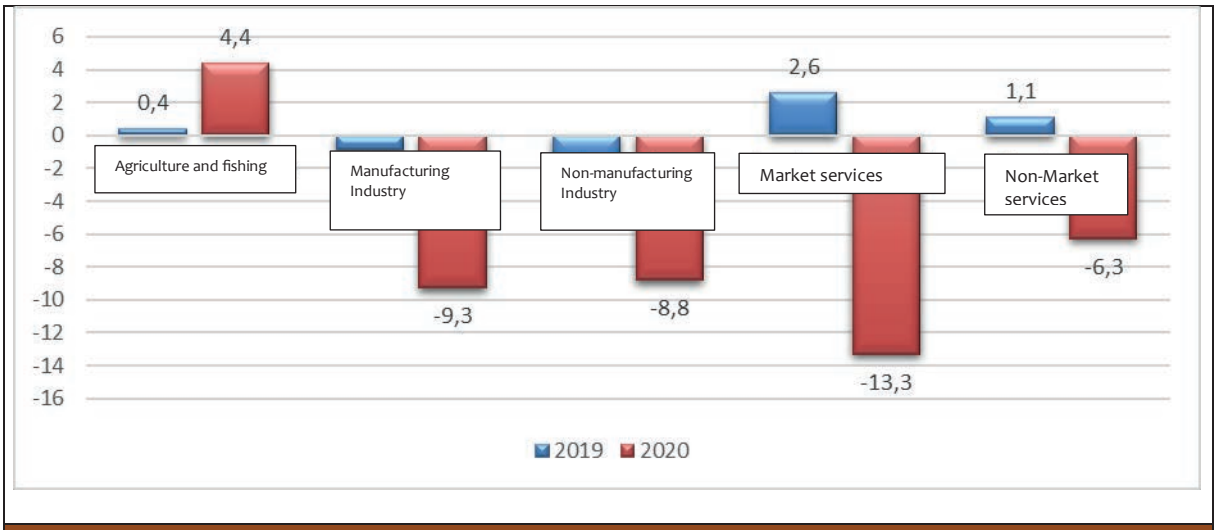
As the only African member of the BRICS (Brazil, Russia, India, China and South Africa), **South Africa** is one of the so-called emerging countries in Africa along with Mauritius and Morocco[21] . It is the second largest economy on the continent ($366 billion in 2020 GDP) behind Nigeria. It has been one of the hardest hit countries on the continent by COVID-19 with nearly 3 million confirmed cases and over 86,000 deaths[22] . As with many African countries, the impact of the pandemic has raised questions about the ability of the South African economy to recover and remain on its path to emergence.

The COVID-19 pandemic has had an immediate impact on the South African economy and society. Economic growth has plummeted from 0.1% in 2019 to -6.4% in 2020. The secondary sector was the most affected by the pandemic with a negative growth rate of 19.3% in 2020, followed by the tertiary sector with a negative growth of 14.1%, while the primary sector was the least affected with a negative figure of 3.5%.

Figure 10: Value added growth in South Africa (%)

[21] Strategic diagnosis of South Africa's emergence, Policy Center for the new South, policy paper, Moubarack Lo Amaye Sy El Hadj Tine, August 2021

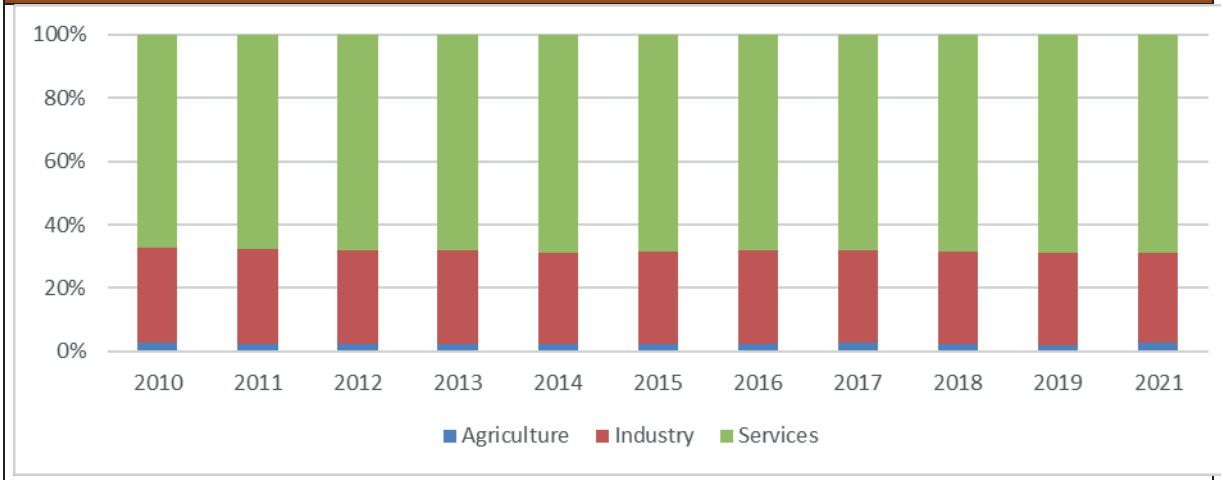
[22] International conference on the emergence of Africa (ICEA) country case study: An assessment of the impact of covid-19 on the trajectory for south Africa's emergence: resilience and lessons learned for a new formulation of emergence strategies, UNDP



Source: South Africa case study, UNDP

While COVID-19 has had an impact on South Africa's economic growth, it has not, as in many other African countries, changed the structure of GDP.

Figure 11: Structure of South Africa's GDP (2010-2020)



Source: South Africa case study, UNDP

The budget deficit has widened from -4.8 of GDP in 2019 to -10.8% of GDP in 2020, mainly due to spending pressures to contain the economic impact of the pandemic and to finance important social assistance programmes.

However, inflation has fallen to 3.4% in 2020 from 4.1% in 2019.

Although data are not yet available, simulations using CGE and micro-simulation models suggest that poverty and inequality have increased significantly, with a higher percentage of household income loss among the less educated. The unemployment rate would have reached 34.4% in the second quarter of 2021, compared to an average of 28.5% in 2019. This rate would be highest among young people aged 15-24, at around 63%.

The impact of COVID-19 has been all the more significant as it comes in the midst of a sluggish South African economy and has exacerbated its structural problems. After rapid post-apartheid growth of around 3% from 1994 to 2011, it has averaged only 0.8% from 2014 to 2019. The percentage of the population below the poverty line fell from 68% to 56% between 2005 and 2010, but has since increased slightly to 57% in 2015 and is expected to reach 60% in 2020. With one of the highest inequality rates in the world, South Africa still remains a dual economy.

In terms of outlook, the South African Reserve Bank (SARB) expects the economic recovery to be moderate due to South Africa's structural constraints, at 3.8% in 2021 and 2.9% in 2022. However, in its October 2021 World Economic Outlook growth projections, the IMF has revised South Africa's growth outlook upwards to between 4% and 5% for 2021 due to the recovery of the global economy, higher commodity prices, the official end of a third wave of Covid-19 and the easing of containment measures.

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In Morocco, the Covid-19 pandemic occurred in a context of loss of momentum for growth and, more generally, for development. It has led to a sharp recession in the economy, with an estimated GDP growth rate of -6.3% in 2020. The health crisis also coincided with two years of drought, which led to a historic drop in cereal production and a 7% fall in the value added of the primary sector. The value added of the secondary sector fell by 3.8% in 2020, after an increase of 3.6% in 2019. The mechanical, metallurgical and electrical industry sub-sector, which includes the key automotive sector, saw an estimated 18.2% decline in value added. The tertiary sector, including tourism, which was strongly impacted by the health restrictions, suffered

a 7.9% decline in value added in 2020. Travel receipts in 2020 would have recorded a loss of -54% compared to those of 2019. The hotel and transport sub-sectors have a decline of 56% and 32% respectively.

The economic crisis following the Covid-19 shock, which led to a sharp fall in real GDP, is likely to exacerbate this economic downturn.

The health crisis has served to reveal the social fractures and precariousness of a certain fringe of the Moroccan population. During the containment, without taking into account the transfer of public aid, absolute poverty would have risen from 1.7% in 2019 to 11.7% in 2020, while Morocco was recording a downward trend in the poverty rate, which fell from 8.9% in 2007 to 2.9% in 2018. The vulnerability rate is estimated to have increased from 7.3% in 2019 to 16.7%. The GINI coefficient, which measures income inequality, is estimated to have reached 44.4%, a deterioration of almost 6 percentage points.

In terms of prospects, economic forecasts predict an acceleration of the economic recovery in 2021 and a return to pre-pandemic GDP levels by 2022. World Bank projections based on data from the High Commission for Planning predict a gradual reduction in poverty in 2021 and 2022.

All in all, the health crisis and its consequences have highlighted the fragility of the Moroccan economic model and the need to adopt structural corrective measures to change the level of development.

In Tunisia, the COVID-19 shock came at a time when the country was already facing acute macroeconomic imbalances. The crisis led to a decline in domestic and external demand, disrupted trade, deregulated value chains, altered consumer and investor confidence, and reinforced the tightening of financial conditions. Tunisia is more exposed than other African countries to the global trade cycle in goods and services and is therefore more dependent on demand from partner countries and more vulnerable to the crisis.

One of the direct consequences of COVID-19 is the deterioration of macroeconomic balances and the aggravation of internal and external deficits.

Also, Tunisia's real GDP growth rate has shown a historic fall from 1.4% in 2019 to -9.2% in 2020, a drop of 10.6 percentage points. This fall resulted from the general recession of all sectors, except for the agriculture and fisheries sector which recorded in 2020 a growth of 4.4%.

On the budgetary front, there is increasing pressure, both on the revenue side (linked to the impact of the drop in economic activity and the fall in tax revenues), and on the expenditure side (direct charges linked to the fight against the pandemic, assumption of social costs, aid to businesses, etc.), while there is little budgetary room for

maneuvering on the expenditure side, due to the preponderant weight of current expenditure (wage charges, debt servicing, subsidies, etc.).

Another impact of the pandemic is the decline in foreign direct investment by 26.0% compared tò 2019. They fell from 2.2% of GDP in 2019 to 1.7% of GDP in 2020.

The sharp contraction in economic activitý has resulted in a rise in unemployment from 14.9% in 2019 to 17.4% in 2020, with the hardest hit sectors being tourism, transport (closely linked to tourism), crafts, events and catering.

The drastic decrease in economic growth must have increased povertý and precariousnesś compared tò the trend of the years before Covid-19. In 2020, the poverty raté, according to the World Bank, would have reached 4.2% (at the $3.2 threshold) and 22% at the $5.5 threshold

In fact, in Tunisia, the COVID 19 crisis came on top of̀ fragilities accumulated since 2008, the date at̀ which the country started́ to move away from its potential growth trend. The health shock has only exacerbated already existing weaknesses̀ whether in the health system, in the transport sector or in public finances.

The economic and social vulnerabilities from which Tunisia suffers do not date back to COVID-19. Since 2008, the Tunisian economy has moved away from its growth trend These vulnerabilities were accentuated after the 2011 revolution, with political instabilitý, a lack of vision and economic visibilitý for economic operators and especially for local and foreign private investors.

In terms of prospects, Tunisia should, according to the IMF forecasts, reach 3.8% in 2021 and 2.4% in 2022, to gradually decrease to stabilise at 1.8% in 2024 and 2025.

In Senegal, the Covid-19 pandemic has hampered the good economic performance achieved between 2014 and 2019 (6% average annual growth) by causing a contraction in activity with a growth rate of 1.5% in 2020 compared with 4.4% in 2019, i.e. a drop of 2.9 percentage points.

An ANSD survey on the impact of the pandemic on the activity of industrial enterprises revealed that 95.8% of industrial enterprises have seen their activities negatively impacted by Covid-19. 70% of companies stated that the degree of negative impact of the health crisis on their activities is greater than 25%.

In its fight against the pandemic and its socio-economic consequences, the state has increased the budget deficit from 3.9% to 6.4% between 2019 and 2020. Due to the

decline in economic activity and the deferral of corporate taxes, state revenues have fallen, with the tax burden falling from 17.6% to 16.7% between 2019 and 2020.

Between 2019 and 2020, the inflation rate increased by a factor of 2.5, from 1.00% in 2019 to 2.5% in 2020, revealing the extent of the transmission channel of the Covid-19 crisis through prices.

In addition, the Covid-19 pandemic has hit the country's exports hard, with the growth rate falling significantly from 11.2% in 2019 to -4.6% in 2020.

The large loans granted as part of the fight against Covid-19 led to a 15% increase in outstanding debt during this period and brought the debt-to-GDP ratio to 68.8%, i.e. an increase of 4 percentage points compared with 2019 and a debt level very close to the maximum rate of 70% defined by the UEMOA convergence criteria.

The decline in national income in the year 2020 due to the pandemic resulted in a decline in GDP per capita of -1.82%, a difference of 3.3 percentage points compared to the year 2019. This decline reflects an increase in poverty. Estimates from the Directorate General of Planning and Economic Policies (DGPPE) show that the impact of Covid-19 on the incidence of poverty is 2.9%, increasing it to 40.7% in 2020.

In terms of prospects, the DGPPE simulations show that the upward trend in growth before the pandemic could be regained from 2025 onwards in the absence of the exploitation of oil resources. The IMF estimates the growth rates for 2021 and 2022 at 4.7% and 5.5% respectively.

These forecasts do not call into question the expectations of the Senegal Emergence Plan (PSE). In the long term, a successful structural transformation, through the various projects of the PSE, could lead to an average growth rate of 7% by 2035. On the other hand, if the past trend is maintained with a partially implemented PES without any major impact on the structure of the economy, as has been the case so far, economic growth could then only be around 3.5 to 4%.

All in all, the Covid-19 crisis revealed the low level of structural transformation of the Senegalese economy.

In Kenya, economic performance has also been negatively affected by the pandemic. The economy grew by a negative 0.3% in 2020 after expanding by 5.0% in 2019 and growing at an average annual rate of 4.7% between 2011 and 2019. This recession was caused by the

disruption of economic activities due to the pandemic, such as reduced demand for goods and services and disruption of labour supply due to movement restrictions and social distancing.

The pandemic led to a 47.7% contraction in sectors such as accommodation and food service activities; arts, entertainment and recreation by 24.3%; administrative and support service activities by 17.7% and professional, scientific and technical activities by 13.5%.

The sector most impacted by the pandemic was tourism, with movement restrictions and containment measures affecting mainly hotels and restaurants. The restrictions on international travel that affected international tourism resulted in a 71.5% drop in international arrivals in 2020 compared to 2019. As a result, international visitor arrival revenues fell by 46.3%.

Arts, entertainment and recreation contracted by 24.3% and administrative and support service activities by 17.7%.

On the other hand, some sectors such as mining and quarrying, finance and insurance have been resilient to the pandemic and have thus supported economic growth in 2020 with sectoral growth of 11% and 6.7% respectively.

The pandemic and the measures to contain it have somewhat aggravated the budget deficit, which rose to -8.1% in 2020 compared with -7.3% in 2019. On the other hand, inflation has been maintained at the 2018 level (5.2%).

Affected by the uncertainty related to the pandemic and its consequences, net FDI to GDP falls from 1.1% in 2019 to 0.3% in 2020.

Gross public debt to GDP increased to 57.3% in 2018, 59.0% in 2019 and 67.6% in 2020 (IMF, 2021).

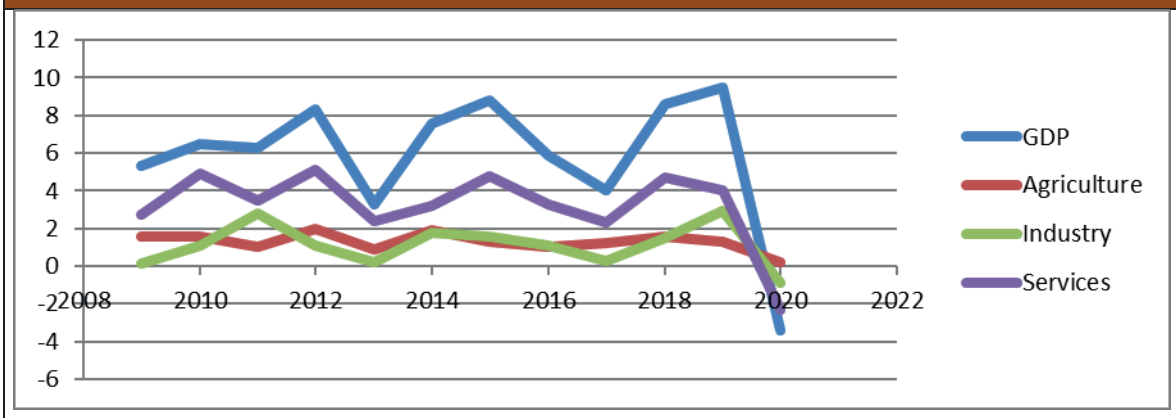
In social terms, salaried employment has gone from a growth of 2.4% in 2019 to -6.4% in 2020, whereas it was growing steadily before COVID-19.

As in other countries, education was particularly affected by the pandemic. The initial full closure following the confirmation of the first case of Covid-19 in the country lasted 28 weeks, or more than two terms. Partial closures lasted 9 weeks between September 2020 and August 2021.

In terms of outlook, the Kenyan economy is expected to recover in 2021 with GDP growth of 5.6% (IMF, 2021).

Rwanda is one of the countries with the largest decline in GDP growth. It has gone from a GDP growth rate of 9.5% in 2019 to -3.4%. All sectors of activity have declined. The growth rate of the agricultural sector from 1.3% in 2019 to 0.2% in 2020, that of the secondary sector from 2.9% to -0.9% and that of the tertiary sector from 4.0% to -2.3%.

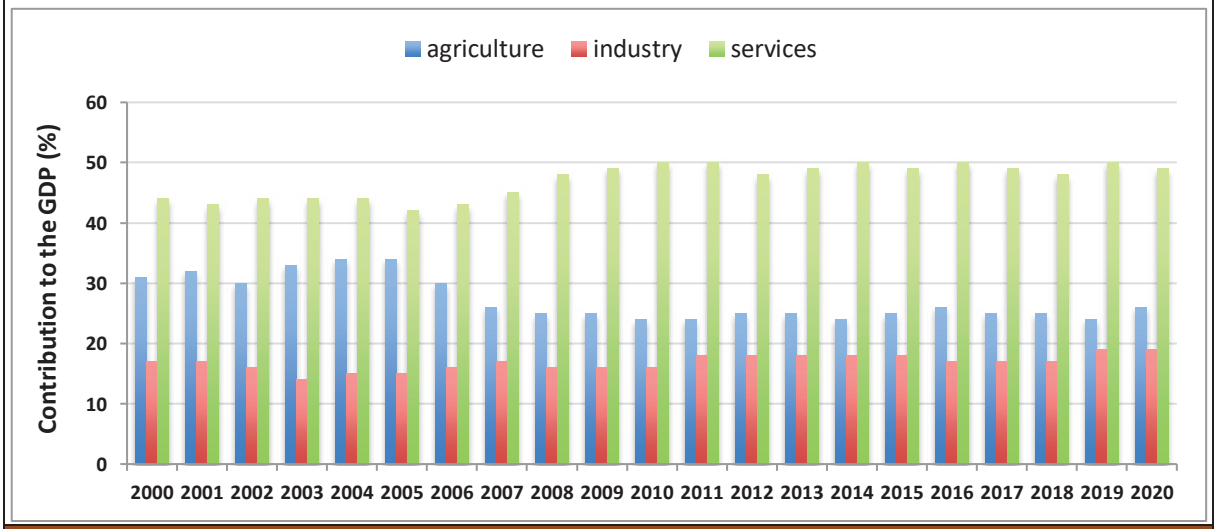
Figure 12: Evolution of GDP and main sectors



Source: Rwanda case study, UNDP

The services sector, which has been important in Rwanda's emergence trajectory, has been the most severely affected. However, Rwanda's economy has continued to be driven by services.

Figure 13: Contribution of the main sectors to GDP in %.



Source: Rwanda case study, UNDP

Another indicator of structural transformation is exports of goods and services, which increased steadily until 2019 to 21.8% of GDP before declining to 19.0% in 2020.

Socially, the unemployment rate was estimated at 20.3% in the fourth quarter of 2020, compared to 16% in the second quarter at the start of the pandemic.

The Rwanda case study estimates that COVID 19 could increase the poverty index by about 38.3% in 2020, by 5 percentage points.

In terms of prospects, Rwanda will, according to IMF data, return to growth from 2021 at 5.1% to rise to 7.0% in 2020

In Gabon, real GDP contracted by 1.8% in 2020 as a result of the 1.2% drop in oil production due to partial compliance with OPEC quotas linked to the sluggishness of the world market during the pandemic, despite a considerable increase in manganese production (+24%). This deterioration in growth was also helped by the 1.7% fall in real GDP excluding oil.)

The public finance situation deteriorated in 2020, with a primary balance surplus of 1.2% of GDP compared with 3.6% of GDP in 2019, and a non-oil primary balance deficit (-7.4% of non-oil GDP compared with -5.8% of non-oil GDP in 2019). These counter-performances are attributable to a drop in budgetary revenue (-17%), which fell as a result of the simultaneous decline in oil revenue (-20.2%) and non-oil revenue (-19.5%) following the measures taken to combat the spread of the pandemic (tax relief, containment, curfew, cessation of activities in certain sectors).

Public debt was estimated at 77.4% of GDP in 2020 compared to 59.8% of GDP in 2019 mainly due to a decline in GDP (about half of the change in the debt/GDP ratio) but also taking into account a considerable amount of domestic arrears accumulated in the past and validated 56.5% of GDP).

The slowdown of the economy, the imbalance in public finances (drop in oil and tax revenues) and the reduction in working hours caused by the health crisis have not been without consequences for employment and the labour market. Thus, 15.3% of households have at least one member who has lost a job due to the coronavirus. This decline in employment and associated income is expected to increase poverty from 33.1% to 34.7% in 2020.

In terms of prospects, economic growth should gradually improve after the sharp contraction recorded in 2020. Indeed, real GDP should increase by 1.5% in 2021, driven by non-oil activity (2.7%), despite a further drop in oil production (-5.5%) linked to OPEC quotas.

In the medium term, Gabon, like many African countries, should return to its 2019 growth level of 3.9% by 2022. Economic activity should then consolidate. This recovery would be the result of an average increase of 3% in non-oil activity and 2.2% in crude oil production per year.

As in many countries**,** the health crisis has exacerbated the structural weaknesses of the Gabonese economy, such as its heavy dependence on revenues from extractive industries, the vulnerability of the SME and VSE fabric, the high level of public spending and the still high number of economically fragile people, despite the efforts made in implementing the emergence strategy.

In Côte d'Ivoire, the impact of the pandemic reduced the GDP growth rate to 2% in 2020 compared with 6.2% in 2019, well below the level of the last four years (2016 - 2019), which averaged 7%. This contraction in the growth rate of the Ivorian economy can be explained by, among other things, the fall in international demand for agricultural products, particularly cocoa and cashew nuts, and the slowdown in domestic activity.

According to the NSI report, 71.7% of households report a loss of income. There has also been an increase in the level of poverty due to the drop in income as a result of the measures taken by the government. Indeed, the proportion of households below the poverty line rose from 16.51% (before COVID-19) to 61.74% (with COVID-19) in 2020.

In terms of outlook, the Ivorian economy will approach its 2019 growth level in 2021 with 6.0% and exceed it in 2022 with 6.5%. However, it is only after 2022 that output per capita is expected to return to 2019 levels.

As in many African countries, per capita income will not return to pre-crisis levels until 2025.

This recovery to one of the highest growth rates in the world confirms that Côte d'Ivoire is one of the fastest growing countries in the world and remains one of the most resilient in Sub-Saharan Africa, particularly in West Africa. However, it still suffers from a weak diversification of its economy. Its exports are dominated by cocoa and cocoa products (39% in 2019), mineral fuels (17% in 2019), edible fruits (1% in 2019), gold and precious metals (8%) and rubber (7% in 2019).

In Nigeria, the largest economy on the African continent ($397 billion GDP), the pandemic reduced GDP growth in 2020 to -1.92%, the lowest level in four decades. This recession was driven by the drastic fall in business activity in the refining, oil transport and storage and coal mining sub-sectors, whose value added

contracted to -62.22%, -22.26% and -20.50% respectively in 2020. A survey by the UNDP and the National Bureau of Statistics (BNS) shows that 80% of formal and informal enterprises reported a decline in output, with the majority reporting a decline of between 21% and 6%. % . The survey also reveals that at least two-thirds of currently operating businesses were closed during the containment (63% of formal sector businesses and 56% of informal sector businesses)

The World Bank estimates that the number of Nigerians living below the poverty line could reach 42.9% (95.7 million people) in 2022 due to the impact of COVID-19 compared to 40.1% (82.9 million) revealed in the Poverty and Inequality Survey conducted by the NSO and UNDP.

Remittances declined by 28% from $23.8 billion to $17.2 billion between 2019 and 2020 due in part to closures, job losses and business shutdowns that affected migrant workers in their host countries.

The increase in inflation from 11.4% to 13.2% between 2019 and 2020 has also contributed to the increase in poverty in Nigeria.

While the average number of school closure days in West Africa was 91 days, in Nigeria it was more than 180 days, equivalent to 2 lost learning terms. Distance learning could not be an effective remedy because of the lack of internet, computers and e-learning skills for teachers and students.

In terms of outlook, Nigeria, despite the adverse effects of the pandemic on economic and social indicators, would have returned to its pre-Covid-19 growth rate by 2021. But at 2.6% in 2021 and 2.7% in 2021, these rates are still below its desired GDP growth rate (of 3.8%) in the medium term. However, the level and sustainability of this growth will be highly dependent on crude oil prices and production, highlighting the need for the country to strengthen its strategies to diversify the economic base from natural resources (especially unrefined products such as crude oil) to agro-industry, light industry and heavy industry.

The challenges affecting Nigeria's emergence are diverse but not dissimilar to the challenges faced by many African countries in their journey towards emergence. Primarily, the over-reliance on commodities and the general volatility and relatively low prices of some of these commodities.

In Madagascar, the COVID-19 crisis has put a brake on the growth momentum the country has experienced since 2014. After sustained average growth of 3.7% over the period 2014-2019, the economy experienced a sharp recession in 2020. Initially projected at +5.5%, economic growth contracted sharply to -7.1% in 2020. The secondary sector

was the most affected by the effects of COVID-19, with a 29.5% drop-in activity in the main exporting industrial branches, namely the extractive industry (-56.8%) and the textile industry (-15.7%). The decline in the services sector was -6.5% in 2020 compared with 5.0% in 2019. This decline was driven by the underperformance of tourism-related industries such as hotels and restaurants (55.8% in 2020) and transport (-6.4%). The agricultural sector was relatively resilient with growth of 0.6% in 2020 compared with 5.9% in 2019.

The public deficit has widened (-3.5% of GDP in 2020 compared with -1.4% in 2019) due to a drop in public revenue (9.9% of GDP in 2020 compared with 11.0% of GDP in 2019) and an increase in public spending linked to the measures taken to curb COVID-19 and to the continuation of development efforts (16.7% of GDP in 2020 compared with 15.5% of GDP in 2019).

In terms of prospects, Madagascar could, after the 2020 downturn resulting from the pandemic, return to its 2019 level of economic growth from 2022. Projections are for growth of 5.4% in 2022 and 8.0% in 2023, compared with -6.1% in 2019. The 2019 level of GDP per capita (USD 532.7) should also be reached in 2022.

The COVID-19 crisis has highlighted Madagascar's high economic and social vulnerability. Over the past decades, the Malagasy economy has undergone little structural transformation. It is an economy that is mainly based on services (54% of GDP), highly dependent on tourism, very volatile, with a poorly developed industrial sector that generates little added value. It is still below its growth potential.

Ethiopia, despite a relatively high growth rate of 6.1% in 2019/2020, has been impacted by the pandemic. This growth is the lowest recorded in the last 17 years after the 2003 drought. It is also 2.8 percentage points below the ten-year average (2010-2020) and 1.6 percentage points below the average growth rates of the past five years (2015-2020). The sectors most affected by the pandemic are the hotel and restaurant sector and the manufacturing sector, both of which were hit by the pandemic and the resulting policy measures.

Growth in the sub-sector has fallen from 9% in 2018/2019 to 2.2% in 2019/2020, well below the ten-year average of 14.3% (2011-2010) and the five-year average of 6.6% over the 2015-2020 period.

In the manufacturing sector, more than 42% of businesses ceased operations completely on 1 April and 4 May 2020, and 37% of businesses had no income in March or April. The pandemic also affected the construction, wholesale and retail trade, transport and communications and finance sectors.

In terms of prospects, the continuation of Ethiopia's emergence trajectory risks, in addition to the impact of the pandemic, being undermined by the war with Eritrea

In Cameroon, national economic activity slowed sharply in 2020, with real GDP growth collapsing to +0.5% after +3.5% in 2019. This contraction in growth was brought about by the decline in activities in all sectors: primary (+0.6% after 3.9%), tertiary (+0.6% after 3.1%), accommodation and restaurants (-6.4% after +4.2%), transport and warehousing (-1.3% after +4.1%), forestry (-1.8% after +6.1%) and industrial and export agriculture (-1.6% after 5.0%). Thus, according to the results of the survey carried out in 2020 by the NSI among businesses and households, 74% of heads of households claim to have experienced a drop in their activity.

This slowdown due to the Covid-19 pandemic is also reflected in the reduction in international trade. Cameroon's exports of goods fell by 24.6% in 2020 compared to 2019, while imports of goods fell by 17.6

Socially, the suspension of face-to-face teaching activities and the uncertainty about the resumption of classes have considerably disrupted the school year and impacted school results: the success rate for the baccalaureate exam in general education was 47.2% in 2020, compared with 60.5% in 2019, and that for the middle school diploma (BEPC) was 60.8% in 2020, compared with 73.2% in 2019.

Beyond the current deterioration in the economic, financial and social health of countries, COVID-19 could have important consequences for the evolution of the emergence path of countries

In order to assess the effects of COVID-19 on the evolution of emergence indicator targets, **Cameroon**, using simulation tools, has developed two scenarios. The first, Scenario No-COVID, is the reference scenario. It provides information on the evolution of Cameroon's emergence indicator targets in the case of a non-occurrence of the Covid-19 pandemic. The second scenario, entitled COVID Scenario (alternative scenario), describes the behaviour of the emergence indicators in the context of a Covid-19 crisis.

The simulations show a deviation from the country's emergence path. The growth rate would average 7.6% over the period 2021-2030 in the No-COVID scenario, compared with 5.8% in the *COVID scenario*, a difference of 1.8 growth points. According to the IMF, Cameroon would regain the 2019 growth rate of 4.5% in 2022 and exceed 4.8% from 2023.

However, a comparison of the projections made in the *No-COVID* scenario and the *COVID scenario* reveals that the Covid-19 crisis would not have significant effects on the sectoral structure of Cameroon's GDP.

The long-term impact on poverty would be moderate, with 31% in the scenario without COVID and 32% in the scenario with COVID by 2030, or 1 percentage point over 10 years.

While the social and economic effects of the pandemic may hinder the achievement of Cameroon's development objectives, they have further revealed the extraversion of the Cameroonian economy and the associated vulnerabilities.

In the Democratic Republic of Congo, the Covid-19 pandemic and external and internal measures to contain it reduced its GDP growth to 1.7% in 2020 from 4.4% in 2019. Sectorially, the primary sector grew by 7.1% in 2020 compared with 1.7% in 2019, supported by strong growth in the extractive sub-sector of 9.7%. Activities in the secondary sector showed negative growth of 4.9%, whereas in 2019, this sector posted a growth rate of 9.8%. The services sector grew by only 0.2% in 2020 compared to 5.6% a year earlier.

The epidemic containment measures and movement restrictions have generated inflationary pressures: inflation rose from 2.3% in 2019 to 17.9% in 2020, mainly supported by the rise in food prices. The cost of food increased by 9.4% in 2020, compared with 4.8% in 2019, mainly due to the contraction of goods imports following the closure of borders and the depreciation of the Congolese franc.

On the social front, to contain the spread of the pandemic, the DRC closed schools throughout the country for six months, from March to October 2020, depriving over 27 million children of access to education. They will reopen in October, only to be closed again due to the second wave. As in many African countries, lack of internet access has also prevented distance learning.

In terms of income poverty, the World Bank has estimated a 0.7 percentage point increase in poverty between 2019 and 2020 due to the Covid-19 pandemic, while other studies suggest that the pandemic is likely to lead to at least a 2.27 percentage point increase in the incidence of extreme poverty.

In terms of prospects, the DRC is expected to return to robust economic growth with rates of 4.9% and 5.6% in 2021 and 2022 respectively. This dynamic should be maintained, as the DRC economy is still evolving on a path below its potential.

Overall, despite the government's efforts to accelerate growth and support the process of structural transformation of the economy, the productive structure remains poorly diversified, dominated mainly by the agricultural sector (21% of GDP) with low value added and the extractive sector (20% of GDP) with low labour intensity. The industrial sector (25% of GDP) comprises only a very limited number of under-capitalised,

small and medium-sized enterprises. Similarly, the service sector (33.6% of GDP), despite its large size, remains dominated by the informal sector with low productivity.

In summary, all countries have, after a decline in activity at the heart of the pandemic in 2020, returned to economic growth from 2021 onwards and regained their emergence trajectory. With the exception of Rwanda, where 2019 recorded the highest growth rate of the decade 2000 - 2019, with 9.5%, all the countries under review have without exception, as the graph above illustrates, recovered their 2019 growth rate in 2022. Thus, one could deduce that while the impact of COVID19 may have delayed the pace, it has not reversed the emergence trajectories of African countries. The COVID-19 crisis has, however, revealed the still low level of structural transformation of African economies and their high vulnerability to external shocks.

Figure 14: Real GDP growth in % over the period 2019 - 2021

Source: DRC case study, UNDP

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Partial conclusion

The effects of Covid-19 in the fourteen case studies prepared for the ICEA- IV should be analysed along several dimensions: macroeconomic, social, technological, cultural, environmental and governance. However, it is mainly from the point of view of the economic and social costs of the pandemic that the impact of Covid-19 has often been approached.

In terms of the economy, the record is clear: the pandemic has had disastrous effects in all the countries concerned.

At the macroeconomic level, the case studies all show a slowdown in economic growth, rising inflation, declining foreign trade, a widening budget deficit and increasing external debt.

The containment measures taken by governments at national and international level to contain the spread of the pandemic have led to a slowdown in economic activity. As a result, GDP growth in 2020 was negative in most of the countries surveyed. All countries, without exception, experienced a loss of growth points. This historic loss of growth exceeded 10 points in some countries such as Mauritius, Rwanda, Madagascar and Tunisia.

No African country has escaped the decline in foreign trade, with both exports and imports falling as a result of border closures.
Border closures, travel restrictions, curfews, etc. have caused inflationary pressures everywhere.

The decline in economic activity has led to a worsening of budget deficits, due to the fall in government revenues and financial efforts to support sectors and economic actors affected by restrictive measures taken by states to contain Covid-19.

The large loans granted, particularly through the increase in SDRs in the context of the fight against Covid-19, have led to a significant increase in the total public debt of countries. Combined with the fall in GDP, the increase in public debt led to an increase in debt ratios in 2020 of between 5 and 10 percentage points depending on the country.

Box 2: On the problem of the debt generated by the fight against COVID-19
The moratorium on debt service payments, decided on 15 April 2020 by the G20 for 44 African countries, is a salutary initiative to provide them with a direct financing capacity for their urgent need to fight the viral pandemic. There is, however, a significant limitation to the implementation of a moratorium or cancellation: the measure primarily benefits the most indebted countries (which may be those that have mismanaged their debt the most), which are not necessarily the worst off in terms of health facilities or the most affected by the

pandemic. The solution that will have to be found is rather to put a figure on the real needs in terms of health and negative economic impacts (disruption of production and sharp drop in demand; fallout from the sudden slowdown in global growth and the tightening of financial conditions; and a sharp drop in commodity prices), or more simply to take the size of the population (these are women and men who are sick), then to put a figure on the amount of aid needed and, therefore, the amounts to be rescheduled or cancelled.
As Kako Nubukpo points out (Le Point, 15 April), the logic behind debt relief is implacable: for Africa to be able to buy goods and services from the rest of the world, it must have budgetary leeway. But for this absorption capacity to be preserved, it is necessary to periodically write off its debt, the servicing of which is undermining its ability to enter the international trade game. The current announcements are no exception to this logic, in a context where the post-Covid-19 crisis is shaping up to be difficult for the economies of the developed and emerging world. African central banks are also mobilising, as are businesses. Over time, it is reasonable to expect that more sophisticated strategies will be adopted to create the foundations for a more robust future. In the short term, response plans in almost all countries (e.g. Côte d'Ivoire, with $184 million) are responding to the top priority of increasing health spending to save lives.
The economic recovery seen in 2021 (globally and regionally) will therefore be beneficial if it is sustainable, resistant to mutations of the COVID-19 virus and part of an international solidarity programme that facilitates access to the vaccine for all populations of the world.
At present, it should be noted that the economic recovery observed is not the same everywhere, in a context of uncertainty. African countries face several challenges in reviving national economies and repositioning themselves on a long-term growth path.
Pierre Jacquemot

Socially, COVID-19, the restrictive government measures and the associated general decline in economic activity have had a significant impact on the health system, employment and household income.

The health toll in Africa has been less alarming than was predicted at the outset of the pandemic, but the shock of COVID-19 is still a cause for concern, particularly because of its impact on African health systems, which it has severely tested and shown its vulnerabilities

More globally, the Covid-19 pandemic is expected to lead to a decline in the HDI at the global level in general and in Africa in particular. The magnitude of the Covid-19 shock on the different dimensions, namely health, education and standard, could lead to the largest reversal of the human development trend since 1991.

The measures taken to contain the pandemic have not only changed working conditions but also weakened the employment situation. Almost all economic sectors, especially the service sector, have experienced a slowdown in activity.

The general decline in economic activity has had a negative impact on household income in Africa. The increase in poverty levels was estimated to average 2-3 percentage points, depending on the country under review. This poverty may have been exacerbated by the decline in remittances from migrant workers to their families, caused by business closures and job losses in host countries.

Education has been severely affected by the pandemic, resulting in prolonged school closures. The average number of school closure days recorded in West Africa ranged from 91 days to a full term. Despite distance learning being introduced in the countries, many pupils and students did not attend classes as normal, due to the lack of computer or television equipment, internet and e-learning skills for teachers and students.

Overall, the social and economic effects of the pandemic may have hindered the achievement of African countries' development objectives. But the health shock has only exacerbated and revealed the fragilities and vulnerabilities already existing in African economies. These economies continue to be characterised by excessive dependence on commodities, despite the emergence plans, as a result of low diversification and high extraversion.

COVID-19 revealed the low level of structural transformation of African economies. It also showed that the economic models of the most African countries on the emergence path, such as Mauritius and Tunisia, are running out of steam and that these countries need to adopt strategies to change their development path.

To summarise the above developments, **Covid-19 is a health crisis with a human, political, economic and social impact**

Indeed**,** COVID-19 caused loss of life on all continents. The most advanced nations were the most affected (USA, Brazil, India, England, etc.). These losses of human life, and therefore of labour, destabilise production systems and the dynamics of generational know-how.

The political management of the pandemic remains controversial in several countries and some governments are being criticised for their strategies to combat Covid-19, which are accompanied by anti-social measures and restrictions that are seen as transgressing the fundamental rights of freedom and choice. Popular protests have been organised in several countries including in African countries.

On the social level, even if the virus does not spare any social category, some social categories are more vulnerable than others to the measures taken to contain the

spread of the virus; this is the case of all groups that do not benefit from social protection, urban informal actors, rural populations, migrants, the unemployed.

On the cultural gap, barrier measures were seen as being at odds with certain African cultural values.

The technology gap and digital divide has been felt in areas such as vaccine production, teleworking, and distance learning.

Overall, the social and economic effects of the pandemic may have hindered the achievement of African countries' development objectives. But the health shock has only exacerbated and revealed the fragilities and vulnerabilities already existing in African economies. These economies continue to be characterised by excessive dependence on commodities, despite the emergence plans, as a result of low diversification and high extraversion.

The pandemic can also be read as a 'total social fact' in the sense given to this term by Marcel Mauss, even if it is still largely approached in a fragmented, partial and biased manner. Its irruption therefore upsets the order of things and marks a point of rupture or, at the very least, a bifurcation, an inflection in the trajectory of economies and societies. It is therefore fully justified to ask questions about the post-COVID world. We will tackle this in the next chapter with the clear awareness that a certain humility is required for several reasons that we will simply mention here:

a) With a few exceptions, sectoral approaches have been predominant in COVID's analysis: sometimes economic, sometimes health, sometimes political (governance), rarely systemic as would have been desirable given the global nature of the crisis mentioned above.

b) There are still many uncertainties about the post-COVID world, as both experts and political actors still have serious differences of opinion. Real camps are forming and when the battle rages, the truth is, as in all wars, the first casualty. This is all the more true since, in the face of the health emergency, the usual processes of research and scientific validation have been somewhat disrupted, as if to say that "when the fire is raging, we don't care about the quality of the water we use to put it out". This pragmatism has led to a certain scepticism about vaccination and barrier measures, including in scientific circles, and in some cases has led to measures of mistrust of the administrative authorities.

In spite of these reservations, scenarios of evolution can be sketched out.

IV. What about emergence? The scenarios

In a recent article, Hamidou Anne notes that the coronavirus has sparked interest in Africa for debate. "The new statements," he writes, "are produced by politicians, ministers in charge of strategic sectors, artists, women and businessmen .... In their narratives, the observation is always made that the solution lies within us in exploiting new possibilities and in seeking out new utopias that create meaning. These are narratives rooted in a local imagination that produce global solutions on the scale of the pandemic.

The narrative of the coronavirus observed from the African continent shows a contemporaneity of the initiatives despite the differences in the enunciative forms. Moreover, the narrative hegemony that has long favoured a discourse unfaithful to reality is tending to change. It is worth remembering with Chimamanda Ngozi Adichie that "when we reject the single story, when we realise that there is never a single story for any given place, we reclaim a kind of paradise". The post-COVID future would thus be more open than ever.

In such circumstances, the idea that one should never miss the opportunity of a crisis takes on its full meaning. Indeed, as the Chinese ideograms show, a crisis is certainly a threat but it is also an opportunity. The COVID-19 pandemic is no exception to this rule: it is fraught with multiple challenges that must be met in the short, medium and long term, but it also offers opportunities to be exploited to accelerate Africa's emergence.

How this crisis is used will depend on two sets of factors:

a. the relative weight given to variables that are considered to be part of the system under study. However, when it comes to the future of African countries after the COVID-19 pandemic, a number of variables are called upon or invited. These include the economic and social projections of specialised agencies; modes of production, infrastructure, industrialisation and ICTs; governance, democracy and human rights; the treatment of national debt and domestic debt owed to the private sector; the treatment of private sector debt; concrete actions to implement the AFTFTA and strengthen regional integration; strategies and structural reforms for the country's emergence and economic and social development; opportunities for strengthening intra-African and South-South cooperation, to name but a few that the UNDP has included in its concept note.
b. the attitude we will adopt towards the future. In this respect, three attitudes are possible, which will inspire three families of scenarios. Schematically, three

attitudes are possible (a) a *reactive attitude* which would consist of relaunching the plans but without change, at most some adjustments; (b) a *pre-active* attitude which would consist of reconsidering the plans so as to take on more strongly than in the past concerns whose strategic nature has been highlighted by the crisis: this is the case, for example, of resilience or food or health sovereignty.(c) a *proactive attitude* which consists of giving the country the means to achieve its long-term vision as soon as possible at the lowest economic, social, political or cultural cost.

Against this background, three families of scenarios and strategies can be envisaged: we will call them incremental, adaptive and refounding.

Before presenting them, it is worth recalling that scenarios are modes of exploring the future; a form of diving into possible futures, those that may happen. Some people ask what their usefulness is, arguing that the most important upheavals in history were not envisaged by futurists and that, conversely, certain disaster scenarios did not come true. These questions are not unfounded, but they must be put into perspective; in the case of COVID-19, the possible occurrence on a global scale had been perceived, but the mortality risks had been greatly overestimated for Africa. It is also important to keep things in perspective because foresight is neither a forecast nor a prophecy. It is an attempt to understand the dynamics that will inform possible futures. As such, it is a decision-making tool on long-term and/or strategic issues. Taking an interest in this future time is for a strategist -state, company, household- not only necessary but justified

4.1 From the incremental strategy

It would be to consider that COVID is a setback but that there is no need to change course because the soundness of the system has not been called into question. Some would even argue that Africa has shown an unsuspected resilience. The reforms to be implemented as a matter of priority belong to the category of ***reactive strategies***; they aim to plug the most obvious gaps and to restart (Reset/relance) as soon as possible a machine that has been temporarily stopped.

Acceleration and adjustment will be the key words in this paradigm.

Box 3: Senegal's Adjusted and Accelerated Priority Action Plan 2 (PAP2A)

With a view to re-establishing the growth trajectory set by the Emerging Senegal Plan (ESP), the authorities have readjusted the Priority Action Plan (PAP) based on Phase II of the ESP.

The new Adjusted and Accelerated Priority Action Plan 2 (PAP 2A) integrates the new challenges arising from the COVID-19 crisis and aims at ensuring a real endogenous development supported by a strong national private sector, with the involvement of all stakeholders. The main challenges to be addressed are :

- the reduction of Senegal's dependence on the outside world through sustainable and inclusive industrialisation;
- accelerating food, health and pharmaceutical sovereignty;
- consolidation of social protection and territorial equity;
- the promotion of a strong domestic private sector in the economy.

It is also articulated around three (3) strategic axes:

- Strategic axis 1: Structural transformation of the economy and growth. The priorities of this strategic axis are to promote sectors driving growth, exports and social inclusion, to increase the level and efficiency of investments in the economy, to develop quality infrastructure, to improve access to energy and land, to strengthen the foundations for high productivity and to promote inclusive and sustainable industrialisation;
- Strategic axis 2: Human capital, social protection and sustainable development. Through this strategic axis, the Government intends to improve the state of health and nutrition of the population, promote quality education in line with socio-economic, environmental and cultural needs, promote research and innovation for development, improve access to energy in rural areas, to quality water and sanitation, improve access to social housing and a decent living environment, promote decent work, accelerate the pace of demographic transition, promote better governance of migration, promote social protection and reduce the degradation of the environment, natural resources and the adverse effects of climate change;
- Strategic Area 3: Governance, Institutions, Peace and Security. The main strategic objectives of this axis are the improvement of the quality of public service, the strengthening of citizenship and the rule of law, the promotion of gender equity and equality, the reinforcement of peace and security and the strengthening of territorial governance.
- Within the framework of the implementation of this plan, particular attention will be paid to priority and sovereignty sectors. These are mainly agriculture, fisheries and aquaculture, livestock, health, pharmaceutical industries, promotion of industrial platforms, digital transformation, tourism and air transport as well as other key sectors (urban planning and housing, social protection, etc.).

Four innovative financing mechanisms are foreseen in the PAP 2A for economic recovery. These are :

- a financing mechanism for Small and Medium Enterprises (SMEs) and Large Enterprises (LE) in the form of a state guarantee, bank financing and special financing dedicated to SMEs and LE;
- a financing mechanism for the informal sector in the form of technical training, support for the formation of the one-stop shop and the establishment of a financial package with the support of the Decentralised Financial Systems;
- a project preparation and start-up fund;
- and a venture capital fund for the mobilisation of national savings, with a view to supporting the implementation of profitable projects, particularly in Public-Private Partnerships.

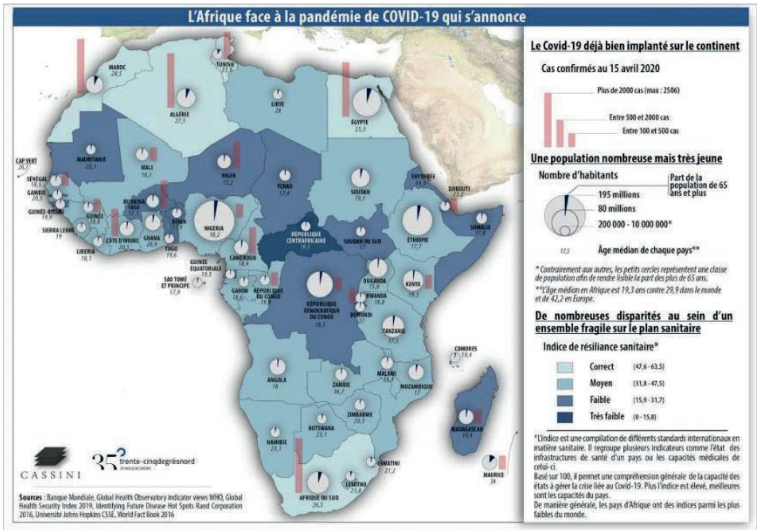
Source: Republic of Senegal (2020). Adjusted and Accelerated Priority Action Plan 2 Document.

A central question, and one of the two to be answered at the conference, according to the NC, is how to absorb the negative consequences of the pandemic and revive and transform African national economies. There are opportunities to be seized immediately. As the NC notes, the health crisis also offers African countries the opportunity to exploit market niches captured by existing or created informal enterprises (manufacture of fabric muffs and transparent visors by tailors or economic operators who have invested in the acquisition of 3D printers), thus creating many jobs on the continent.

In countries where the reactive strategy would become dominant, the health sector should be a major beneficiary of post-COVID investments. A few facts should be recalled in this respect:

There is evidence that severe health system handicaps exist. Although Africa has remained one of the continents least affected by the pandemic, health systems in African countries are notoriously fragile and would have been quickly overwhelmed by the pandemic if the number of cases had increased exponentially as it did on other continents. This is all the more plausible given that, according to the World Health Organisation (WHO), Africa manufactures only a tiny share - about 3% - of global pharmaceutical production. It receives only 1.3% of the world's financial resources devoted to health and has only 3% of the world's health professionals (WHO, 2018).

Admittedly, Africa has shown a certain capacity to mitigate health risk and has assets in the fight against the virus, such as having a young population (60% under 24 years of age) or having already learned how to fight other serious pandemics (HIV-AIDS, Avian influenza in most of the continent, the Chikungunya virus in the Indian Ocean and East Africa, the Zika virus, Lassa fever and the Ebola virus in West Africa), as well as progress in the fight against malaria and tuberculosis.



But it is likely that the continent's health resilience would have been put to the test. To prevent this from happening, and to stave off the spectre of a death sentence, the pyramidal nature of health systems, both spatially and functionally, will be the subject of particular attention.

The same will apply to the distribution of the public good of health. It should be recalled that today about 60% of total health expenditure is spent on private or faith-based providers. In some countries, such as Uganda and Ghana, it exceeds 70%, while in others, such as Namibia, it is less than 10% (Source, WHO, 2018).

It is likely that improvements will be made to :

1. Access to essential services with a strong focus on providing the necessary infrastructure (health posts, hospitals), staff and commodities for these services within an accessible range and at affordable prices;
2. Quality of services to increase the success of treatment, assurance of safety and effectiveness of interventions, all of which are currently insufficient;
3. Household and community demand for essential health services, including prevention, immunisation and primary care, is met with inadequate supply;
4. The resilience of systems to risk factors such as disasters or epidemics: this is generally low but higher in countries that have been exposed to Ebola (Guinea, Liberia and Sierra Leone[23]), suggesting that lessons have been learnt and appropriate investments made.

[23] Ebola has infected more than 28,000 people and caused more than 11,000 deaths. Its human cost has been considerable in terms of suffering, social dislocation and food insecurity.

4.2. Adaptive strategies

The pandemic has revealed the urgent need to strengthen health systems (financing, organisation, competence of actors implementing health policy, response to users' needs) in Africa. More specifically, it has highlighted the continent's backwardness in the areas of research and medical production.

The pandemic has also disrupted education and vocational training systems in a region where 60% to 70% of the population is under 35 years of age. The closure of schools for long periods of time has meant less time for learning and a disruption of learning patterns. While many African governments have established distance education systems to ensure continued access to education during primary and secondary school closures, this has not been the case for technical and vocational training systems, which require learning on physical platforms and not just the acquisition of intangible knowledge.

The reforms to be implemented will be to increase investment in sectors where countries have been lagging behind. It will be a matter of promoting policies that enhance the value of human capital. This priority given to human capital is in line with the spirit of the SDGs and the paradigm underlying the "emergence pyramid".

Over time, it is reasonable to expect that more elaborate strategies will be adopted to create the basis for a more robust future. For example, in the medium term, African countries will need to put in place strategies to improve the situation in terms of access to water and sanitation, investment in human capital, strengthening the efficiency of public administration and the development of intra-African value chains under the African Continental Free Trade Agreement for import substitution.

Greater attention could also be paid to endogenous knowledge and its articulation with modern health systems. In this respect, the counter-narratives produced by Madagascar on artemisia deserve reflection.

Box 4: Counter-narratives on artemisia

By announcing a "vita malagasy" (made in Madagascar) remedy with its virtues, the Malagasy president changes the narrative perspective of the coronavirus. In this way, he installs a scientific controversy that he transforms into a social controversy with a scientific theme. Thus, he introduces a break, a disruptive element, in the habit of validating knowledge. Andry Rajoelina starts from what Gramsci calls common sense to attack the dominant discourse on the coronavirus. Common sense here is the set of most important conceptions by which some Africans perceive and interpret their lives, their environment and their own bodies.

In this report, Covid-Organics, by confirming the certainties of those who denounce the pharmaceutical industry, challenges the dominant narrative of adherence to scientific protocols. Similarly, it becomes a counter-narrative in this society of battle, tackle and spectacle. It exploits the methodological slowness of the experimentation of the search for a COVID-19 solution open to the general public, far from the laboratories and the specialised journals. Andry Rajoelina is popularising artemisia by banking on vital possibilities (traditional medicine) and the power of a new local episteme that is open to the world. With this new interest, the Malagasy president is challenging his African peers while keeping in touch with the public via social networks. His tweets become micro-narratives that highlight his country while rallying those who are less conformist, less attached to the ready-made ideas of the narrative world order.

In this same perspective, President Macky Sall's call for debt cancellation is part of a logic of narrative rupture. The repetition of his statement by Pope Francis during his homily before the urbi et orbi blessing of Easter and by President Emmanuel Macron, testifies to the appropriation of this counter-discourse. Moreover, the Senegalese president has been appointed to lead the African task force in the framework of negotiations for the cancellation of this debt. However, this counter-discourse should be an opportunity to rethink the place of social justice in public policies, the priorities of access to education, to quality health... An external focus for an African good life

Pre-active strategies, with some room for the precautionary principle, will be appropriate in this family of scenarios. They could aim at pooling, at the continental/regional level, expertise in the fields of medical research, innovation and production, strengthening health systems, improving and rapidly increasing access to vaccines in Africa, strengthening and reorienting training programmes in education and vocational training systems, exploiting the rapid development of digital technology and digitalisation (electronic payments, training, teleworking, e-commerce, use in agriculture, etc.), and strengthening Africa's governance capacities in the face of crises;

Finally, the COVID-19 pandemic offers African countries the opportunity to accelerate the development of value chains, in conjunction with the establishment of the AFTFTA. The objective is to prepare and succeed in moving away from international specialisation in primary products. But whether it is a question of ensuring sustainable financing of economies, developing a strong private sector that provides jobs (intensifying job creation opportunities in the private sector), pursuing the structural transformation of economies, or reducing food insecurity and other forms of vulnerability, strategic anticipation is necessary[24] .

[24] See the article by A. Sall. *Why does strategic foresight matter*?

4.3. Refounding strategies

The demands for transformation are hammered home by many analysts who, for the sake of convenience, will be called refounders. They invite decision-makers and actors not to accept the status quo, but to engage in critical reflection on Africa's place in the post-Covid-19 era. For the refounders, it is a question of revisiting emergence, placing it or repositioning it in the alternative paradigm of human security[25] . In other words, it is a question of moving 'from current vulnerabilities to new user-friendliness', to use IPAR's expression. In a way, the UNDP NC is emblematic of this line of thinking when it asks: What new approach to Africa's emergence should be devised on the basis of lessons learned and new opportunities to be seized (redefinition of priorities, role of the health system, taking account of vulnerabilities, development of education and scientific research, pooling of African expertise to solve common problems, reorientation and rationalisation of domestic funding, etc.).

Pierre Jacquemot takes a similar line when, in an article entitled **Sortir de la crise et changer de cap: les 4 R**, he argues that "It is historically proven that any major crisis causes many victims but can also give rise to salutary mutations. He quotes at length in this article from a contribution by A. Sall which proceeds in the same vein.

"Are we going to see a reconfiguration of the world order, based on the observation that while capitalism knows the price of everything, it does not recognise the value of anything? asks A. *The crisis reminds us that the real source of value is human relations and solidarity... Nothing should be the same as it was before, because what the crisis reveals is that millions of people who do not usually talk to each other are discovering that they need each other. The slogan so dear to the proletarian internationalists that "united we win, divided we fall" has never been more relevant than today, when the epidemic has given birth to a global precariat. Societies may have short memories, but it seems to me that it will be difficult, after this crisis, to doubt that our society must be different. It will be hard to ignore that what defines a society is compassion, not insecurity, inequality and fear* [26]

The forms of change are therefore to be invented. There is nothing to prevent us from thinking that the changes underway, full of meaning, will lead to the emergence of another model based on solid foundations. Many African intellectuals are calling for the creative imagination needed to get off the beaten track and find answers that are equal to an exceptional situation. The manifesto of 13 April 2020, signed by 88 African intellectuals, including Wole Soyinka, winner of the Nobel Prize for Literature, outlines the contours of

[25] The texts of the Bamako Forum and the UNFPA op-ed on this subject are interesting to read)
[26] Alioune Sall, Director of Futurs Africains, April 2020, interview with Le Soleil, Dakar.

a new African paradigm: it is a question of Africa *"breaking with the subcontracting of our sovereign prerogatives, renewing our ties with local configurations, moving away from sterile imitation, (...) thinking about our institutions in terms of our common singularities and what we have, thinking about inclusive governance and endogenous development (...). The lack of political will and the actions of the outside world can no longer be excuses for our turpitude. We have no choice: we must change course. It is high time"*[27] .

In a nutshell, it is time to change the old "extroverted" economic model based on cash crops and the import of everyday consumer goods. The pandemic is a reminder of the importance of "*unleashing the endogenous growth potential of the African continent*", in the words of Ibrahim Assane Mayaki, the Director of the African Union Development Agency (AUDA-NEPAD). Africa will first have to rely on its own strengths to anticipate the new cycle of globalisation. Priority must be given to strengthening local agri-food value chains and to making the African continent a true agricultural powerhouse whose production would be primarily intended for domestic consumption. Many think tanks *and* African associations are warning about the ecological and social content of the new model and the need, once the vital emergency is over, to direct it towards the construction of a "resilient" world, i.e. a world capable of avoiding, mitigating and managing future health, food and security shocks, rather than suffering and succumbing to them.

Proactive strategies will be required in this family of scenarios. They must be backed by a shared long-term vision in which Resilience, Refocusing, Responsibility, Accountability (the **4Rs**) will be the cornerstones

All in all, and in the words of the UNDP concept note, the COVID-19 pandemic offers African countries the opportunity to build a new scale of priorities in the design and implementation of national emergence plans. This new scale of priorities should, according to some agencies, "closely link the search for long-term growth, the development of human capital and the capacity to exploit new information technologies (ICTs)".

But doesn't the crisis offer an opportunity to rethink axiological reference points, to question the aims of development? On this point, Africans seem to want to get out of the ruts or models that often force them "to sacrifice being on the altar of having, values on that of monetary value, honour on that of honours,

27 https://africanshapers.com/covid-19-88-intellectuelless-africaines-interpellent-les-dirigeants-africaines/.

reasons for living on that of the means of living", to quote an African leader [28]

For Africans, the structural transformations that need to be carried out consist in rethinking economies that are integrated into their socio-cultural substratum, in symbiosis with the living world. The 're-enchantment' of the world will not take place without a re-embedding of the economy in society. In other words, in this scenario, the economic revolutions associated with emergence will only reach their full potential if they are also cultural, social and political revolutions. "We have to work on this," argues Felwine Sarr, a professor of economics and a leading advocate of a post-capitalism that he describes as a "concrete utopia". If his words meet with a favourable response, the post-COVID emergence could well mark a bifurcation.

Box 5: Thinking and working for the future

A battle is raging between those who think and say that the post COVID-19 world will not be the same as before and those who believe that nothing will change. Consumerist habits are entrenched, ferocious capitalism will not surrender so easily, it will prolong its life. For the time being, it has the weapons of global finance, the power of the multinationals, a political oligarchy that is mostly in its favour, and we trust it with the satisfaction of our basic needs as well as our desires. Moreover, we heard one of its thurifers say that after confinement, we should speed up the pace of work, which shocked him and earned him a volley of green wood. An encouraging sign of the times. These are unprecedented times in many ways. Only a few months ago, no one could have foreseen that the train would come to a halt, world industrial production would be on hold, air transport would be limited to carrying necessary goods, economies would be slowed down and their programmed restart by activities deemed essential; that Europe and the USA would be the epicentre of a global pandemic for which they pay the heaviest price, that the air in the megacities would be breathable again and the desire for a new world would be so strongly expressed. Like tightrope walkers, we are balancing over the abyss of possibilities. A gap in time has opened up, and it points to new historical potentialities. The question is not who will make the best prognosis of the time to come, but how tomorrow could and, above all, should differ from today. The crisis alone, however, will not decide the matter. Its function is to indicate what is no longer tenable and what must change. In order for it to bring about an upheaval, we need to think about it, but above all to work on it. Post-capitalism: a concrete utopia. In a magnificent text, Hala Moughanie launched an appeal to utopians. Responding to this call obviously means thinking about the tension between utopia and reality, but above all conceiving utopia, as Miguel Abensour does, as an endless search for a just and good political order. For the majority of people around the world, this global economic and political order is not. The contribution of Utopia is to make manifest the plasticity of the world. It allows us to envisage history as a space of potentialities, of reconfiguration and recomposition; and to imagine the possible beyond the real. The reality we live in is in the process of unravelling under our skies. The temptation to patch it up is certainly strong, but we could also accelerate its collapse. We are living through an upheaval that opens the way to social transformation, but only if we work at it. For those of us in Africa, this pandemic is first and foremost an opportunity to take stock of our deficits in basic socio-economic infrastructure, social safety nets,

[28] IBK at the opening of the AfCFTA launch conference, Niamey, July 2019

health infrastructure, and care for the most vulnerable. The resilience plans designed here and there on the Continent should be the embryos of public policies resolutely geared towards satisfying the basic needs of the population, the basis of which is to nourish life and provide care for the many. The imperative is to ensure food security, energy independence, the creation of continental value chains, ecological industrialisation, a better choice of the modalities of our integration into international trade, a move away from primary specialisation, the transformation of our raw materials locally as well as the diversification of our economies.

Felwine Sarr

V. Conclusion

Three questions, corresponding to as many parties, structured the reflection carried out in this synthesis report of case studies on the impact of COVID-19 on the trajectories of emergence in fourteen African countries.

The first was **what is emergence and how have countries sought to achieve it**?

The second part dealt with **the inflections introduced by COVID into the trajectories of emergence.** This part was similar to a **diagnosis.**

The third question was about **the desirable, plausible or possible future(s) for the countries**. This part was to be **prospective** in that it was to explore the field of possible futures.

The data collected and the analyses carried-out throughout this report show that there is no simple, let alone unequivocal, answer to any of these questions.

With regard to the first question, it must be recognised that attempts to define emergence, far from being set in stone, depend for the time being on the approaches to the subject, which can be broadly reduced to three schools of thought. In one of these, emergence is seen from the perspective of international finance and the criteria for definition is the high attractiveness of markets in which to invest capital abroad, particularly in developing countries (van Agtmael 2007). In another school of thought, emergence is understood from the point of view of the impact of the phenomenon on the recomposition of international geo-economic and geopolitical balances. The third school of thought uses the following criteria to measure emergence: strong and sustained growth in an economic and social context still marked by great poverty; relative institutional stability; and a desire for power that gives rise to apprehension because emerging countries are asserting themselves on the international scene at the expense of traditional powers.

From the review of these currents of thought, several points can be made

> they complement each other more than they oppose each other and could well be considered as tropisms rather than constituted schools
> None of these schools of thought are, strictly speaking, entirely appropriate for Africa because, according to them, no African country would meet the criteria for emergence; not even South Africa, despite being a member of the BRICS Club.
> These efforts to conceptualise emergence in Africa are continuing, even though they often come up against divergent interpretations of starting points, the uneven level of development of the continent's countries, the diversity of emergence trajectories depending on whether or not countries have natural resources, in short, African heterogeneity

Commonalities can be noted in the discourses on emergence and the approaches to sustaining it: On the one hand, the idea of economic leaps, dear to Rostow, while implicitly drawing inspiration from the trajectory of Asian developmental states (Routley 2014);on the other hand, an anchoring on a long-term vision, a national development plan or an emergence plan with a well-defined horizon (2040 for Côte d'Ivoire, 2050 for Nigeria, 2035 for Senegal and Cameroon, 2030 for South Africa, Mauritius, Kenya, Ethiopia and the DRC, 2050 for Rwanda, 2025 for Gabon); common themes widely shared

With regard to the second question - **the inflections introduced by COVID into the trajectories of emergence -** it must be recognised that taking stock, let *alone* assessing the impact of a process in progress, is always a perilous exercise because of the lack of hindsight. In the case of COVID-19, the task is made even more difficult by the fact that the virus has not yet revealed all its secrets and that there is a lot of uncertainty about the effectiveness of vaccination, which remains the most effective weapon for containing and stopping the spread of the virus. Predicting the end of the pandemic is therefore particularly difficult; a futile exercise according to some.

In spite of these difficulties, which should encourage caution, it should be remembered that **the** overall outcome of the pandemic is negative, and the opposite would have been surprising: logistical chains have been broken, value chains destroyed and poverty increased. However, because of its global nature, the impact of the pandemic should be analysed from other aspects that are less well studied but just as essential as the economic dimensions: it is, in this case, the social, political, environmental, cultural and technological facets of the pandemic that some national reports have pointed out and sometimes attempted to shed light on. Going beyond the simple snapshot, these reports have tried to highlight the dynamics that explain the situation and, as far as possible, the interaction between the different areas affected by the pandemic. Similar exercises conducted by other institutions have attributed to COVID the exacerbation of certain latent frustrations in African societies, the revolts recorded here and there, and the resurgence of so-called populist ideological movements, all of which would have provided a breeding ground for the intensification of the actions of rebel groups or the unconstitutional intervention of the armed forces in the political sphere through coups d'état. However, even if the interaction between the political, the economic and the social cannot be doubted in the COVID-19 pandemic, it is perhaps necessary to be wary of indiscriminately embracing such conclusions, which some might find hasty.

Indeed, even if the economic recession caused by COVID-19 clearly jeopardised the maintenance of national economies on the path of sustained economic growth that some of them had been experiencing for almost two decades, the countries under review

seem to have recovered and even exceeded their 2019 emergence score by 2021, with the exception of four countries. This means that, without prejudging the long-term impact of COVID-19, most countries have returned to their emergence path by 2021.

With regard to the third question, namely **the future of emergence, the post-COVID world,** the answer can only be given in the plural. There are many plausible and possible futures for countries and thus the post-COVID future would be more open than ever.

In such circumstances, the idea that one should never miss the opportunity of a crisis takes on its full meaning. The COVID-19 pandemic is no exception to this rule: it is fraught with multiple challenges that need to be addressed in the short, medium and long term, but it also offers opportunities to be exploited to accelerate Africa's emergence.

Against this background, three families of scenarios and strategies are possible: they have been called incremental, adaptive and refounding. This foresight approach should not be confused with forecasting or prophecy; it is an attempt to understand the dynamics that will inform possible futures. As such, it is a decision-making tool for long-term and/or strategic issues. Taking an interest in this future time is for a strategist -state, company, household- not only necessary but justified.

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