

## **The Pillar Sectors of the Moroccan Economy's Stability Amid the COVID-19 Pandemic**

### **Les secteurs piliers de la stabilité de l'économie marocaine à l'épreuve de la pandémie de la COVID 19**

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## Abstract

The spread of COVID-19 has caused both a health and economic crisis in Morocco, severely impacting the country's key sectors. This document compares the current situation to that of 2019 and explores the projections for 2020. The analysis focuses on three pillar sectors: education, security, and health, examining how these sectors interacted with the pandemic.

The health sector was particularly affected, with increased pressure on infrastructure and human resources. Education had to adapt to distance learning, revealing inequalities in access to digital tools. Security, for its part, had to manage the enforcement of restrictive measures and maintain public order.

The Moroccan government responded with emergency measures to mitigate the socio-economic impacts of the pandemic, but challenges remain. This document also proposes additional policies to reduce the negative effects, particularly by strengthening the affected sectors and preparing the country for sustainable economic recovery.

**Keywords:** Covid-19; Economic impact; Health; Education; Security.

## Résumé

La propagation de la COVID-19 a provoqué à la fois une crise sanitaire et économique au Maroc, impactant sévèrement les secteurs clés du pays. Ce document compare la situation actuelle à celle de 2019 et explore les projections pour 2020. L'analyse se concentre sur trois secteurs piliers : l'éducation, la sécurité et la santé, en examinant comment ces secteurs ont interagi avec la pandémie.

Le secteur de la santé a été particulièrement affecté, avec une pression accrue sur les infrastructures et les ressources humaines. L'éducation a dû s'adapter à l'enseignement à distance, révélant des inégalités dans l'accès aux outils numériques. La sécurité, quant à elle, a dû gérer l'application des mesures restrictives et maintenir l'ordre public.

Le gouvernement marocain a réagi avec des mesures d'urgence pour atténuer les impacts socio-économiques de la pandémie, mais des défis subsistent. Ce document propose également des politiques supplémentaires pour réduire les effets négatifs, notamment en renforçant les secteurs touchés et en préparant le pays à une reprise économique durable.

**Mots-clés :** Covid-19 ; Impact économique ; Santé ; Éducation ; Sécurité.

## Introduction

The year 2019 was marked by the emergence of Covid-19. This virus, part of the coronavirus family<sup>1</sup>, was identified for the first time in Wuhan, China<sup>2</sup> on December 31, 2019<sup>3</sup> before quickly spreading internationally and across the five (5) continents<sup>4</sup>, affecting more than 150 countries, with the number of cases reaching 25.3 million infections to date and 16,669,974 closed cases (cases concluded), which led many countries to adopt control measures, such as isolation and quarantine<sup>5</sup>, which were not systematically evaluated.

However, the economic situation observed so far suggests dramatic global consequences<sup>6</sup>. In the context of the health crisis, the global economy suffered considerable and widespread deterioration in 2020<sup>7</sup>, with the collapse of stock markets, unsustainable private sector debt, speculation on the sovereign debt of vulnerable states, massive liquidity injections by central banks, and costly bailout plans hastily devised by states.<sup>8</sup>

Although we are not doctors tasked with identifying the symptoms and causes of this new virus or finding an effective antidote to stop its spread, as economists, we can address the economic impacts it may cause.<sup>9</sup>

Indeed, the economic consequences can spread just as quickly as the virus itself. Morocco is part of a group of under-industrialized developing countries<sup>10</sup>, with an economy primarily driven by tourism, consumption, and trade.<sup>12</sup>

Morocco reported its first case of COVID-19 on March 2, 2020, and a state of emergency was declared on March 20, 2020.<sup>13</sup> Since then, the pandemic has shown a controlled increase, with cases rising by an average of 5.5% per day. According to a survey conducted by the Moroccan High Commission for Planning, one-third of Moroccans self-isolated even before the official health state of emergency was announced.

After three months of strict lockdown, a gradual easing of restrictions was announced. Unfortunately, family gatherings during Eid interrupted the progress achieved over the months of confinement, triggering what was referred to as a 'fourth wave'.

According to a note published on March 26, 2020, by the European Union Delegation to Morocco's Commercial Section regarding the economic impact of COVID-19<sup>14</sup>, the tourism sector was the hardest hit, with substantial losses recorded due to the cancellation of flights, events, and large gatherings across the country.<sup>15</sup>

To anticipate and address the economic fallout from the COVID-19 health crisis, the Moroccan government set up the Economic Monitoring Committee (CVE). This committee is tasked with tracking the evolving economic situation and identifying suitable measures to support the hardest-hit sectors, utilizing sectoral monitoring mechanisms <sup>16</sup>.

Faced with the magnitude of this global crisis and its effects in Morocco, a critical question arises: how can Morocco mitigate the economic impact of the COVID-19 pandemic, particularly in key sectors such as education, health, and security, and what public policies could be implemented to ensure a sustainable economic recovery?

The overall approach adopted in this work is positive rather than normative, meaning we strive to base our analysis on facts, gathering objective or scientific explanations of how the economy functions.

This work is composed of two sections. The first focuses on the macroeconomic level, where we examine the economic indicators recorded during 2019, such as economic growth, external economy, price stability, inflation, labor market, and employment... The last part of this section covers the economic outlook for 2020.

The second section describes the impact of COVID-19, particularly on the three (3) pillar sectors of the Moroccan economy: education, health, and national security. We will then assess the relevance of public policies adopted by the Kingdom of Morocco under the directives of His Majesty King Mohammed VI to manage the economic and health crisis.<sup>17</sup>

These findings will allow us to demonstrate the impact of the COVID-19 epidemic on the Moroccan economy and propose some solutions to minimize the consequences of this health crisis.

### **1. Economic developments in the Moroccan economy before COVID-19**

Following Morocco's independence in March 1956, the country faced a series of economic challenges, including declining investments, capital flight, an accelerated rural exodus, and rising unemployment, all of which had serious economic consequences.<sup>18</sup>

From the adoption of Morocco's first constitution in 1962 through to the 2011 constitution, the Kingdom implemented a series of far-reaching reforms. These were aimed at promoting human development, democratizing the state, advancing women's rights, and strengthening institutional frameworks and governance structures...<sup>19</sup> to address the socio-economic dysfunctions and disparities in the country.

Due to concerted efforts and a strong commitment to development, Morocco's economic performance in the years following the 2008 subprime financial crisis was generally positive in

terms of growth. However, the growth rates achieved were still insufficient to significantly reduce unemployment.<sup>20</sup>

### **1.1 Economic indicators recorded in 2019**

Economic indicators reflect the level of socio-economic development in a country or organization. These indicators are crucial for evaluating the effectiveness of development strategies, as they are influenced by living conditions, educational opportunities, and the professional skills created through economic growth and human capital investment.<sup>21</sup>

#### **1.1.1 Economic growth**

In 2019, the global economy experienced a synchronized slowdown, with economic growth weakening in most emerging markets.

Global growth in 2019 was revised down to 2.6%, 0.3 percentage points below previous forecasts, marking the slowest pace compared to the 3.8% rate of 2017<sup>22</sup>, a year when the global economy saw synchronized recovery, reflecting widespread weakness observed in the first half of the year, including a further deceleration in investment amid escalating trade tensions. Notably, global trade growth in 2019 was revised downward by a full percentage point to 2.6%—slightly below the pace seen during the 2015-2016 trade slowdown, and the weakest since the global financial crisis.<sup>23</sup>

Economic growth in Africa was estimated at 3.4% in 2019, which is relatively low compared to the region's average growth rate of 5% over the past decade.<sup>24</sup>

In Morocco, economic growth followed a cyclical pattern. We note that for roughly two (2) years, the country's economic growth has been on a downward trend. The Kingdom experienced a sharp slowdown in GDP, which fell by 2.3% in 2019, compared to 3% in 2018. Factors that impacted Morocco's GDP included:

- The decline in agricultural production (-5.4%)
- The slow growth of non-agricultural products (+3.3% in 2019, compared to +3% in 2017).

#### **1.1.2 External economy**

Global merchandise trade volumes fell slightly by 0.1% in 2019, following a 2.9% increase in the previous year. Merchandise trade, which represents the average of exports and imports, saw a 3.0% decline in value terms, compared to a 10.2% increase in 2018.

Global trade in commercial services increased by 2.1% in 2019, significantly slowing down compared to its 8.4% rise in 2018. Transport exports decreased by 0.8% due to the slowdown in merchandise trade. Other commercial services recorded the highest export growth (3.3%)

among service sectors in 2019, supported by continued, though slower, growth in telecommunications, computer, and information services.<sup>25</sup>

In terms of the African continent, the average current account deficit for Africa is estimated at 4.2% of GDP for 2019, compared to 3.4% in 2018. This improvement was mainly due to substantial increases in current transfers (remittances and aid).<sup>26</sup>

Morocco's trade transactions with the rest of the world recorded less pronounced growth (+2.2%) than in 2018 (+10.2%).<sup>27</sup>

Thanks to increased imports of energy products, food products, finished consumer goods, and capital goods, trade in Morocco saw import growth of +559 million dirhams (MDH).

However, net export contributions remained negative, despite an increase of +288 million dirhams (MDH), due to insufficient competitiveness and dependence on energy imports.

Nevertheless, the coverage ratio remained stable at 57.4%, compared to 57.2% in 2018.<sup>28</sup>

Foreign direct investment (FDI) flows experienced a significant decline in 2019 compared to 2018, with a decrease of 46.1%, according to the Office des Changes.

### **1.1.3 Price stability and inflation**

Inflation, as measured by the consumer price index, reflects changes in the cost of a basket of goods and services purchased by the average consumer.<sup>29</sup>

In 2019, inflation stood at 2.301%, down from 2.458% in 2018. Lower demand reduced prices for metals and energy, which helped keep overall inflation in check.<sup>30</sup>

In Africa, inflation remains high and persistent in most countries on the continent, thanks to stable commodity prices and increased tax and non-tax revenues for major resource-exporting countries. However, the average inflation rate fell by 2 percentage points, from 11.2% in 2018 to 9.2% in 2019.<sup>31</sup>

In Morocco, inflation remained around 2% in 2019. In addition to prudent monetary policies and falling import prices, inflation and reforms to the BAM's status resulted in the maturity and effectiveness of its action, helping control inflation.<sup>32</sup>

### **1.1.4 Labor market and employment**

In 2019, the global labor force reached 3.46 billion people aged 15 and over, who provide labor for the production of goods and services during a given period.

The employment rate continued to decline, reaching 57.33% in 2019, down from 57.582% in 2018.

The quality of employment is often poor, particularly for the most vulnerable. Informal employment and worker poverty remain widespread and persist worryingly in many developing countries.

### **1.1.5 Public finances**

The African continent saw rather high and rising levels of public debt and state-guaranteed debt in most African economies (56% in 2018, compared to 38% in 2008).

The rise in external debt ratios is mainly due to:

- The end of the commodities supercycle;
- Growth and export revenues slowed in 2019;
- Macroeconomic and governance instability.<sup>33</sup>

In Morocco, the budget deficit exceeded 46 billion dirhams in 2019, although the budget balance improved during the third quarter of 2019, with a strengthening of ordinary revenues, which were still insufficient to cover all public expenditures, especially after the increase in operational spending following salary raises in mid-2019.<sup>34</sup>

Ordinary revenues fell by 4.74% in November 2019 compared to the same period a year earlier. Public spending, on the other hand, increased significantly, rising from 197.2 billion dirhams in 2018 to over 210.8 billion dirhams, with a variation of 6.9%. This was mainly due to increased spending on goods and services and public debt, which accounted for 81.3% of the national GDP.

## **1.2 Economic Outlook for 2020**

### **1.2.1 Economic Growth**

Assuming that potential setbacks were avoided, a slight increase in global growth was forecast for 2020, with projections of 2.7% in 2020 and 2.8% in 2021.<sup>35</sup>

Regarding Morocco, according to forecasts from the High Commission for Planning, growth was expected to accelerate and average 3.3% in 2020-2021, driven by the impetus of secondary and tertiary activities.

### **1.2.2 External Economy**

Global trade in goods weakened significantly at the end of 2018 and the beginning of 2019. While trade in Asia was significantly affected, the slowdown in industrial activity was widespread across all countries. This weakness partly reflected a decline in demand for capital goods amid increased uncertainty over trade policies. Global trade growth was expected to slow to 2.6% this year, the weakest pace since the global financial crisis.

Morocco's current account balance was expected to improve due to the increase in exports of manufactured goods and tourism revenues, along with lower prices for certain imported goods and products. Foreign direct investment (FDI) was expected to stabilize around 2% of GDP. Net international reserves were expected to remain above five (5) months of imports in 2020.

36

### 1.2.3 Price Stability and Inflation

Inflation was expected to remain relatively stable, slightly decreasing to around 8.2% in 2020 and 7.3% in 2021.

In North Africa, inflation was projected to stay below 10%. In countries like Egypt and Tunisia, inflation has recently decreased due to improvements in their balance of payments. Inflation rates across most other African regions were also expected to remain relatively stable. However, in a number of countries, particularly those experiencing severe macroeconomic imbalances, inflation was high.<sup>37</sup>

In Morocco, inflation was projected to average around 1%. Several reforms were planned, such as maintaining fiscal discipline, increasing tax revenues, improving governance, and overseeing state-owned enterprises...<sup>38</sup>

### 1.2.4 Labor Market and Employment

An increase in unemployment figures was anticipated in the event of an economic slowdown. More importantly, overall unemployment rates provide only a partial picture of labor market dynamics and often mask underlying structural weaknesses. A full assessment of employment trends reveals a more nuanced—and in many countries, more worrying—picture.<sup>39</sup>

One concern is that in many countries, labor shortages have not been accompanied by a significant increase in real wages, despite continuous productivity growth.

In this context of deteriorating economic growth, a 14.8% increase in Morocco's unemployment rate was expected, a rise of 5.6 percentage points compared to 2019.<sup>40</sup>

## 2. "Post-COVID" : Disruption of Forecasts

The COVID-19 pandemic spread rapidly, infecting millions of people and bringing economic activity to a near standstill as countries imposed strict movement restrictions to contain the virus. As the health and human toll increases, the economic damage is already evident and represents the greatest economic shock the world has experienced in decades.

In the OECD's March 2020 Interim Economic Outlook, the downside scenario projected global growth to halve to 1.5%. This was optimistic. The latest estimates from the OECD Economic Outlook of June 10 suggest an unprecedented collapse in the first half of 2020—a nearly 13%

decline in global GDP. Moreover, the costs for the global economy from support programs, central bank interventions, and fiscal measures are enormous and risk having complex and lasting effects on sovereign and corporate debt management. Despite these efforts, most major economies now seem poised to enter recession, and more severe scenarios cannot be ruled out. In this context, it is clearly necessary to maintain trade flow, both to ensure the supply of essential goods and to send a signal of confidence to the global economy. Trade is essential to saving both lives and livelihoods.

However, maintaining trade flow requires cooperation and trust—ensuring, for example, that the market will supply essential goods, that countries will not impose export restrictions, and that imports pose no health risks. This is a particular challenge at a time of trade tensions when the international trading system was already subject to a growing number of new restrictions and distortions, from tariff increases among major traders to significant government support in key sectors. Ongoing negotiations aimed at managing and preventing tensions are now complicated by mobility restrictions. Yet in the context of the severe economic strain of COVID-19, it is more important than ever to avoid escalating current trade tensions.

The pandemic is expected to plunge most countries into recession in 2020, with per capita income contracting in most countries around the world for the first time since 1870. Advanced economies are projected to shrink by 7%. This weakness will spill over into the outlook for emerging markets and developing countries, which are expected to contract by 2.5% as they face their own domestic virus outbreaks. This would represent the weakest performance of this group of economies in at least sixty years. <sup>41</sup>

### **3. The Impact of COVID-19 on the Moroccan Economy**

During pandemics and epidemics, illnesses like the flu contribute significantly to economic losses, excess hospitalizations, and increased mortality.

Assessing the impacts of the COVID-19 crisis on societies and economies is crucial to informing and adapting government and partner responses to recover from this health and financial crisis.

Without urgent socio-economic responses, national suffering will intensify.

Long-term development trajectories will be affected by the choices made by the Moroccan government and the support the Kingdom receives.

In this section, we will review historical pandemics such as the Black Death and the Spanish flu, before detailing the impacts of COVID-19 on three pillar sectors of Morocco's economic stability: education, health, and security. We will then evaluate the public policies implemented

by the El Othmani Government, under the directives of His Majesty King Mohammed VI, to address the effects of this pandemic.

### 3.1 Study of the Economic Impact of Pandemics

How should we think about the medium- and long-term macroeconomic effects of global pandemics? This is an important question for policymakers, given the massive economic fallout from the COVID-19 outbreak. The first instinct is to draw on the experience of past natural disasters and armed conflicts, of which the 20th century provides numerous examples.

Looking back, the effects of epidemics are not easy to evaluate. For example, in the so-called Spanish flu, it must be taken into account that it coincided with the Great Depression and two world wars.<sup>43</sup> The mortality rate was much higher, particularly among young people at the time, who made up the primary workforce, affecting one-third of the global population. This pandemic caused an average 6% reduction in per capita income and a 26-percentage point drop in stock market profitability between 1918 and 1928.<sup>44</sup>

If we go back a few centuries, the Black Death was not only much more contagious but also extremely deadly: one in two infected people died. This pandemic lasted from 1348 to 1350<sup>35</sup> and killed between 75 million and 200 million people worldwide, and half the population of England. The consequences of the Black Death were not only health-related. Mortality was much higher in rural areas with lower population density, leading to depopulation of many rural centers, loss of income, and a surge in inflation for essential goods, accompanied by rising wages.<sup>46</sup> In fact, in many regions, it took a generation for the economy to recover, and in many cases, activities changed profoundly. The economic "shock" was such that cities were literally without workers, and fields without peasants.

However, there are enormous differences between how previous pandemics affected populations and the current pandemic: past pandemics devastated the elderly, already scarce due to low aging rates, but they also inevitably affected younger generations and working-age people.

In terms of macroeconomic effects, studies of past pandemics were generally limited to one country or region and rarely spanned more than a decade. In large-scale pandemics, however, the scope is greater for two reasons: the infection itself is more widespread and/or because, due to economic and trade integration, the economic shock has a much wider geographical scope. Thanks to technical advancements and scientific knowledge, our society today is not comparable to that of the past and has many more means to combat pandemics.<sup>47</sup>

### **3.2 Effect of COVID-19 on the Pillar Sectors of Economic Stability in Morocco**

"Post-COVID-19" is a crucial issue for Moroccan society. The challenge is formidable, and the alarming messages are numerous. A new development plan must be put forward to manage the financial crisis and address this new recession.

### **3.3 Education: The "Paradigm Shift" to Distance Learning**

#### **3.3.1 Education in Morocco: Sector Analysis**

While the population growth rate was around 2.7% per year between 1950 and 1970<sup>48</sup>, it is estimated at 1.37% in 2020. For the period 1960-2018, the annual average was 1.87%. This demographic change has influenced and shaped individual behavior, which has become, over the years, more adaptable to the country's economic and social conditions. Compulsory schooling lasts for nine years, from age 6 to age 14. For primary to post-secondary education, the school year starts in September and ends in June. According to the 2020 Finance Bill, the total budget (for personnel, materials, and investments) amounts to 72.42 billion dirhams in 2020, compared to 68 billion dirhams in 2019. <sup>49</sup> Several measures were taken by the Ministry of National Education (MENESFCRS) to limit the spread of the SARS-CoV-2 virus: suspending in-person classes to implement distance learning, postponing spring break, and creating virtual classrooms through the "Teams" collaborative service...

During the lockdown period, teachers and professors upheld their responsibilities and made significant efforts to ensure that lessons continued. Learning, at all school levels, continued through distance learning.

This new model of education offers several advantages, including improved language skills, the development of academic habits, and encouraging students to take responsibility for self-learning, with knowledge accessible through digital platforms...However, there are several major drawbacks: a significant number of students dropped out due to a lack of telecommunication resources, interest in distance learning declined after exams were postponed or canceled, less time was devoted to studies, and students faced difficulties in assimilating online lessons...

### **3.4 The Health Sector in the Face of the State of Emergency**

#### **3.4.1 Measures Taken by the Ministry of Health to Limit the Spread of the Virus**

Significant efforts were made to address the pandemic, including monitoring the national and international epidemiological situation, conducting daily risk assessments for Morocco, deploying the COVID-19 response and surveillance system, launching the 'Wiquayatna' app,

providing diagnosis and patient care, controlling infections, and maintaining communication and public awareness...

However, the public health sector is weakened by its budget. Public hospitals are in a state of crisis, illustrated by the degradation of emergency services and the extremely poor state of hospitalization conditions and the remoteness of healthcare centers. Fortunately, in 2020, the sector's budget reached 18.67 billion dirhams, the highest since independence. <sup>48</sup>

### **3.4.2 Dysfunction in the Moroccan Healthcare System**

One of the major challenges facing the Moroccan healthcare system is the shortage of personnel. The health sector is short by approximately 9,000 doctors and 15,000 nurses. Additionally, Morocco does not train enough medical professionals to meet this demand. Other issues in this sector include:

- Challenges in providing access to healthcare for the most disadvantaged populations and those in rural areas;
- Poor management of public hospitals;
- Lack of a comprehensive pharmaceutical policy;
- Absence of a formal partnership policy with civil society organizations. <sup>49</sup>

## **3.5 Security: The National Strategy for Preserving Public Health Order**

### **3.5.1 Measures Taken by the Ministry of the Interior to Limit the Spread of COVID-19**

- Empowering regional Walis and Governors, through the decree proclaiming the health emergency, to implement the government's policy against COVID-19;
- Use of firmness (sanctions, coercion, and legitimate force) to maintain public order;
- Division of tasks among various public order enforcement services;
- Provision of necessary resources to support the civil health system and maintain public order by the Royal Armed Forces (FAR);
- Expansion of the scope of defense to address security challenges.

### **3.5.2 Limits of the Public Order Preservation System**

The government has a duty to implement measures to protect public health, which inevitably involves restrictions on individual freedoms. Balancing the protection of public health with maintaining citizens' civil liberties has proven difficult during this health crisis.

"No one is supposed to ignore the law" is a saying that assumes citizens know the laws that govern them. However, during the health crisis, especially as cases multiplied, several decisions

were made. While they were not unjustified in themselves, the way they were made and announced posed the greatest problems.

## Conclusion

The health and economic crisis of 2020 has offered several important lessons, which will undoubtedly help Morocco build a more self-sufficient economy and reduce its reliance on foreign dependencies.

Key lessons from the COVID-19 crisis include:

- National autonomy and independence are crucial to safeguard the economy from collapsing under the strain of global crises and external shocks.
- There must be a renewed focus on essential sectors such as health, security, and education (ensuring a healthy population, efficient education systems, and a sustainable environment) to prevent future crises and prepare for both pandemic and financial risks that could emerge in the coming decades.
- Diversification of partners is imperative.
- Embracing digitalization and integrating advanced technologies could provide Morocco with significant opportunities for cost efficiency and improved performance.

To mitigate the negative effects of the pandemic, we recommend:

- Continuing to enforce health measures and physical distancing;
- Maintaining the 'COVID-19 Special Fund' to manage the long-term economic fallout from the crisis;
- Ensuring that law enforcement officers maintain stability without resorting to unnecessary force;
- Promoting efficient and transparent decision-making processes;
- Continuing the adoption of distance learning and remote work;
- Prioritizing the psychological well-being of citizens.

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