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Export Development in Algeria: Comparative Lessons from Tunisia and Morocco

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Abstract

This study compares the export promotion systems of Algeria, Tunisia, and Morocco using a qualitative comparative approach, and analyzes the alignment between sectoral policies and foreign trade strategies across the three countries. Results show Algeria's export promotion system is fragmented and under-resourced, while Tunisia benefits from a highly integrated support network, and Morocco pursues sectoral specialization combined with market openness. The study recommends that Algeria establish a dedicated high-level coordination body, transform ALGEX into a comprehensive service hub, develop advanced financial tools to reduce export risks, and promote sector-specific support structures.

Keywords: Non-hydrocarbon exports; Meghrib Countries, Export support mechanisms; Trade liberalization

Jel Classification Codes: F13, O55.

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1. INTRODUCTION

Despite possessing significant industrial potential and natural resources conducive to competitive agricultural exports, Algeria has long struggled to diversify its economy away from its heavy reliance on hydrocarbons (World Bank, 2022). In an effort to address this structural vulnerability, the Algerian state has implemented a series of legislative acts, programs, and institutions aimed at promoting non-hydrocarbon exports. These initiatives have sought to modernize economic structures, enhance competitiveness, and facilitate integration into global markets. However, the results have remained modest. Hydrocarbons continue to dominate the export portfolio, and non-hydrocarbon exports, while growing, reached only $7 billion in early 2024, a figure that pales in comparison to the nation's potential.

A robust body of economic literature underscores that successful export-led growth requires a cohesive national vision, substantial investment in export-oriented sectors, and effective institutional coordination (eg. Cadot et al., 2015; Gylfason, 1999). These are elements that appear to be underdeveloped in the Algerian context. The country's export support system is often described as fragmented, with overlapping institutional mandates and a lack of strategic oversight (Benarous et al., 2021). This stands in stark contrast to its Maghreb neighbors. Tunisia, guided by its High Council for Export and Investment, has built an integrated support system that propelled its exports beyond $17 billion. Similarly, Morocco's "Morocco Export Boost" strategy and focus on key global value chains have driven its exports past $21 billion, showcasing a successful model of diversification and openness (International Monetary Fund, 2022).

This regional divergence highlights the urgent need for Algeria to critically reassess its export strategy and draw practical lessons from the divergent paths taken by its neighbors. This study, therefore, undertakes a systematic comparative analysis of the export development and support systems in Algeria, Tunisia, and Morocco. By doing so, it aims to provide

evidence-based recommendations to enhance the coherence and effectiveness of Algeria's export promotion policies.

1.1. Research Problem and Questions

The central problem addressed by this research is the persistent ineffectiveness of Algeria's export diversification strategy, particularly when contrasted with the relative successes of Tunisia and Morocco. The core research question is therefore formulated as follows:

What actionable lessons can Algeria learn from a comparative analysis of the export development and support systems in Tunisia and Morocco to enhance its non-hydrocarbon export performance?

To provide a structured answer to this question, the following sub-questions are addressed:

1. What are the key differences in the regulatory, financial, and institutional frameworks governing export promotion in Algeria, Tunisia, and Morocco?
2. How do the roles and effectiveness of public and private institutions in supporting exporters differ across the three countries?
3. What specific policy instruments and institutional innovations in Tunisia and Morocco could be adapted to address the structural weaknesses in Algeria's system?

1.2. Significance of the Study

The significance of this study stems from the contribution to the academic literature on comparative economic policy by providing a structured analysis of export promotion architectures in the Maghreb, moving beyond single-country studies to identify patterns of institutional success and failure. Second, for Algerian policymakers, it offers a timely and evidence-based roadmap for reform, with recommendations grounded in the successful experiences of neighboring countries that share similar cultural and economic contexts. Finally, the research sheds light on the broader challenges of economic diversification and regional integration in

North Africa, offering insights relevant to other resource-dependent nations seeking to build more resilient economies.

1.3. Study Structure

The remainder of this paper is organized as follows. Section 2 reviews the theoretical and empirical literature on export-led growth and promotion policies, establishing the context for the analysis. Section 3 details the comparative case study methodology, data sources, and analytical framework. Section 4 presents the core comparative analysis, systematically examining the regulatory, financial, and institutional systems in Algeria, Tunisia, and Morocco. Finally, Section 5 discusses the key findings, concludes the study with a set of actionable policy recommendations for Algeria, and outlines avenues for future research.

2. Literature Review and Theoretical Framework

This section establishes the theoretical and empirical context for the comparative analysis. It reviews literature on export-led growth, the effectiveness of export promotion policies, and the specific experiences of Maghreb countries, thereby identifying the research gap this study aims to fill.

2.1. Theoretical Framework

The study is grounded in several theoretical streams. First, the Export-Led Growth (ELG) hypothesis posits that export expansion is a primary driver of economic growth through technology spillovers, economies of scale, and increased efficiency from global competition. While empirical evidence is mixed, studies on Morocco and Tunisia have found support for the ELG hypothesis, suggesting a virtuous cycle between exports and growth (El-Angour & El-Malki, 2021). Second, institutional economics provides a lens to understand why policies succeed or fail. The effectiveness of export promotion agencies and support measures is contingent on the quality of institutions, governance, and the reduction of transaction costs for firms (North, 1990). Finally, theories of competitive advantage, from Porter (1990)’s diamond model to the modern concept of

economic complexity, emphasize that sustainable export success depends on developing sophisticated, specialized productive capabilities rather than relying on raw resource endowments or simple cost advantages (Hidalgo & Hausmann, 2009).

2.2. Empirical Evidence on Export Promotion Policies

A vast literature evaluates the effectiveness of export promotion (EP) programs. These programs typically include financial incentives (e.g., matching grants, tax exemptions), technical assistance (e.g., market information, training), and marketing support (e.g., trade fairs). Research on Tunisia's Fund for Access to Foreign Markets (FAMEX) program provides compelling evidence. Studies by Cadot et al. (2015) and the World Bank (Gourdon et al., 2016) found that the program's matching grants significantly increased beneficiaries' export values and diversification, with durable effects over time. These findings suggest that well-designed, targeted support can overcome market failures and information asymmetries that hinder SMEs from entering foreign markets. Conversely, literature on Algeria's support mechanisms often highlights their limitations, citing insufficient funding, bureaucratic complexity, and a lack of strategic focus (eg. Benarous et al., 2021; Kherbachi & Belkacem, 2016).

2.3. Export Diversification in the Maghreb

Recent comparative studies of the Maghreb region highlight diverging economic trajectories. The World Bank (2020) notes that while Morocco and Tunisia have made significant strides in integrating into global value chains, particularly with Europe, Algeria has remained largely isolated due to its hydrocarbon focus and more restrictive trade regime. Moroccan reforms have successfully attracted FDI and built competitive clusters in automotive and aerospace industries (International Monetary Fund, 2022). Tunisia's strategy, while facing recent challenges, has historically been praised for its industrial policy and focus on upgrading export sophistication (Chemingui & Bchir, 2010). In contrast, analyses of Algeria's performance consistently point to low levels of export diversification and complexity (Aouriri et al., 2024; UNCTAD, 2024), reinforcing the urgency

of policy reform.

2.4. Research Gap

While individual country studies exist, and broad regional reports touch upon trade, there is a gap in recent, systematic comparative research that specifically dissects the institutional architecture of export promotion across Algeria, Tunisia, and Morocco. Much of the existing work on Algeria remains descriptive. This study aims to fill this gap by conducting a structured, evidence-based comparison that moves beyond description to an analytical assessment of institutional effectiveness, drawing direct, actionable lessons for Algerian policymakers.

3. Research Methodology

3.1. Research Design

This study employs a qualitative, comparative case study design. This approach is well-suited for in-depth analysis of complex socio-economic phenomena, allowing for a holistic understanding of the policy frameworks and institutional dynamics within each country (Yin, 2018). By comparing the cases of Algeria, Tunisia, and Morocco, the research aims to identify patterns of success and failure, and to derive contextually relevant policy recommendations.

3.2. Data Collection and Sources

The research is based on a descriptive-analytical approach using secondary data. A comprehensive review of multiple sources was conducted to ensure the validity and reliability of the findings. These sources include:

- **Official Government Publications:** Laws, decrees, and reports from the ministries of trade and finance of Algeria, Tunisia, and Morocco.
- **Institutional Reports:** Publications and data from national export promotion agencies (e.g., ALGEX, CEPEX, Maroc Export) and other relevant bodies (e.g., customs authorities, central banks).
- **Academic Literature:** Peer-reviewed articles, theses, and working papers sourced from academic databases, focusing on trade policy and economic development in the Maghreb region.

- **International Organization Databases and Reports:** Data and analysis from the World Bank (World Development Indicators), UNCTAD (UNCTADstat), the International Monetary Fund (IMF), and the International Trade Centre (ITC Trade Map).

3.3. Analytical Framework

The comparative analysis is structured along two primary axes, which were identified as central to understanding the export promotion ecosystem:

1. Regulatory and Financial Frameworks: This axis examines the laws, regulations, and financial mechanisms that either facilitate or impede exporting. It includes an analysis of foreign exchange controls, tax incentives, customs procedures, and direct financial support schemes.

2. Institutional and Support Ecosystems: This axis analyzes the network of public and private institutions responsible for implementing strategy and supporting exporters. It assesses their mandates, resources, coordination, and the accessibility of their services.

By systematically comparing the three countries across these two axes, the study identifies key strengths and weaknesses in each system, forming the basis for the discussion and recommendations.

4. Comparative Analysis of Export Promotion Systems

This section presents the core analysis of the study, comparing the regulatory, financial, and institutional frameworks for export promotion in Algeria, Tunisia, and Morocco.

4.1. Algeria: A Fragmented System in Need of Cohesion

Algeria's approach to export promotion has been characterized by a series of reforms initiated during its transition to a market economy, yet it remains influenced by structural and institutional constraints. However, these constraints should not be interpreted solely as signs of institutional weakness. Rather, they are rooted in the historical configuration of Algeria’s rentier political economy, where the dominance of hydrocarbon revenues shaped a state-centered development model. In this context, economic

policy has traditionally balanced export diversification objectives with a cautious approach to economic openness, motivated by the need to preserve national economic sovereignty and strategic control over key resources. Consequently, the fragmentation of the institutional framework governing export promotion reflects not only administrative challenges but also the legacy of policy choices embedded in a rent-dependent development trajectory.

4.1.1. Regulatory and Financial Framework

The legal framework for foreign trade in Algeria is principally governed by Order 03-04 and Regulation 07-01, which established rules for trade operations and foreign exchange. While measures have been taken to ease constraints, such as extending the deadline for repatriating export revenues to 180 days, the overall environment remains restrictive compared to its neighbors. Exporters can only freely use a portion (40%) of their foreign currency earnings, a significant constraint on liquidity and reinvestment. Financial support is channeled through two main funds: the Special Fund for Export Promotion (FSPE) and the FNRDA for agricultural support. However, academic analysis suggests these funds are under-resourced and their impact is limited, with the FSPE's subsidies for transport and fair participation often proving insufficient to make a significant difference for SMEs (Kherbachi & Belkacem, 2016). While tax and customs incentives exist (Table 1), their effectiveness is often undermined by bureaucratic complexity and a lack of streamlined implementation.

Table 1. Key Export Support Measures in Algeria

Measure	Main Provisions / Implications
Financial Procedures	Repatriation deadline for non-hydrocarbon export revenues extended to 180 days. Exporters may freely use 40% of foreign currency earnings. Aims to ease liquidity but remains restrictive.
Financial Support	Special Fund for Export Promotion (FSPE) subsidizes fair participation and transport (50-100%), but resources are limited. FNRDA supports agro-exporters, mainly benefiting the date sector.

Tax Incentives	Exemptions on corporate tax for FX-generating operations and VAT on exports. However, administrative hurdles can delay refunds.
Customs Facilities	Measures include Authorized Economic Operator (AEO) status, Green Lane system, and expedited clearance, but implementation can be inconsistent.
Economic Customs Regimes	Customs Law 98-10 created regimes with suspended duties (e.g., bonded warehouses, temporary admission), but their use by SMEs is limited.

Source: the authors based on the cited sources.

4.1.2. Institutional and Support Ecosystem

Algeria's institutional framework for export support is lean and lacks a central coordinating body. The National Advisory Council for Export Promotion, legally established in 2003, has never been fully operational, leaving a strategic vacuum. The primary support agency, the National Agency for the Promotion of Foreign Trade (ALGEX), was created in 2004 to replace a predecessor that failed due to a lack of resources and expertise (Executive Decree 04-174 of June 12 2004, 2004). While ALGEX provides information and organizes events, it lacks the extensive foreign network, regional branches, and comprehensive service portfolio of its Tunisian and Moroccan counterparts (Benarous et al., 2021). Other key institutions include the Algerian Company for Export Insurance and Guarantees (CAGEX), which provides risk coverage, and the Algerian Chamber of Commerce and Industry (CACI). However, coordination between these bodies is weak, creating a fragmented landscape that is difficult for exporters, especially SMEs, to navigate.

4.2. Morocco: A Strategy of Sectoral Specialization and Openness

Morocco's export strategy has been a cornerstone of its economic development model for the past two decades, focusing on attracting FDI, developing specific industrial ecosystems, and aggressively pursuing trade liberalization.

4.2.1. Regulatory and Financial Framework

Morocco has progressively liberalized its trade and foreign exchange regime. A key step was the abolition of the exchange commitment,

simplifying procedures for exporters. While revenue repatriation is required within 150 days, the overall framework is designed to be business-friendly. The "Maroc Export Plus" plan, and its successor strategies, have been central to this effort, built on levers such as a network of free trade agreements covering over 55 countries, sectoral development plans, and targeted support for exporters (Ministry Delegate in Charge of Foreign Trade, 2019). A standout feature is the use of Export Development Contracts, which co-finance exporters' marketing and distribution costs abroad, and the promotion of export consortia to help SMEs achieve scale (Table 2). The establishment of dynamic Free Zones, particularly the Tangier Free Zone, has been instrumental in attracting investment in high-value sectors like automotive and aerospace by offering significant tax and customs incentives (International Monetary Fund, 2022).

Table 2. Key Export Support Measures in Morocco

Measure	Main Provisions / Implications
Exchange Control & Financial Rules	Exchange commitment abolished. Revenue repatriation within 150 days. A liberal framework designed to facilitate trade.
Export Development Contracts	State subsidizes exporters' marketing/distribution costs abroad (up to 80% in Year 1) to help firms enter new markets.
Export Consortiums	State-supported clusters of SMEs to pool resources for export. Support includes co-financing of start-up costs, branding, and prospecting.
Free Zones	Highly attractive incentives including multi-year tax holidays, reduced corporate tax rates, and unrestricted profit repatriation. Key driver of FDI.
Guarantee Operations (CGF)	The Central Guarantee Fund (now Tamwilcom) offers a range of guarantees for investment loans and working capital, significantly de-risking export financing for banks.
SME Support (Maroc PME)	Agency (now AMDIE) provides targeted programs like "Imtiaz" offering investment subsidies to support SME growth and internationalization.

Source: the authors based on the cited sources.

4.2.2. Institutional and Support Ecosystem

Morocco's institutional ecosystem is characterized by a mix of public-private coordination and specialized agencies. The National Council for Foreign Trade serves as a key advisory body, bringing together public and private stakeholders to inform strategy. Maroc Export (now part of the Moroccan Agency for Investment and Export Development, AMDIE) acts as the central promotion agency, providing market intelligence, organizing trade missions, and managing support programs. Critically, Morocco has also established sector-specific bodies like Maroc Taswiq, which groups small agricultural producers to facilitate their access to export markets, and the Independent Establishment for the Control and Coordination of Exports (EACCE), which supports agri-food exporters with quality control and international marketing (Autonomous Establishment for Export Control and Coordination, 2012). This multi-layered, specialized institutional structure provides targeted and effective support across different sectors.

4.3. Tunisia: An Integrated Ecosystem for Exporter Support

Tunisia has the longest history of export-oriented policies in the region, dating back to the 1970s. This has resulted in the development of a mature and highly integrated support ecosystem designed to be accessible and comprehensive.

4.3.1. Regulatory and Financial Framework

Tunisia began liberalizing its foreign exchange regime in the late 1980s, granting significant freedoms to exporting enterprises. The country's policy is guided by clear objectives set by the Council of Ministers, focusing on increasing added value, improving quality, and facilitating trade procedures (Ministry of Trade and Traditional Industries, 2009). A key feature of the Tunisian system is its sophisticated financial support mechanisms. The Export Promotion Fund (FOPRODEX) and the Fund for Access to Foreign Markets (FAMEX) have been instrumental. FAMEX, in particular, has been lauded internationally for its effectiveness, providing matching grants that have been empirically shown to boost firms' export performance and durability in foreign markets (Cadot et al., 2015). The Third Export Development Program (TASDIR+), launched in 2015, continued this approach of providing technical and financial support to

strengthen firms' export capabilities (Columbia Global Centers, n.d).

Table 3. Key Export Support Measures in Tunisia

Measure	Implications
Financial Support Funds (FOPRODEX/FAMEX)	Provides co-financing for a wide range of export-related activities, including market studies, advertising, and training. FAMEX matching grants are proven to be highly effective for SMEs.
The Unified Trade Window / House of the Exporter	A physical and digital one-stop-shop consolidating all key export-related services (customs, banking, insurance, promotion), dramatically simplifying procedures for exporters.
Customs Clearance Procedures	Advanced AEO program, dematerialized documentation ("liasse unique"), and 24-hour clearance times significantly reduce logistical costs and delays.
Means of Financing and Guarantees	A well-developed system of pre- and post-shipment financing, supported by state-backed guarantee funds (e.g., FGCE, managed by COTUNACE) that encourage banks to lend to exporters.
Tax-related Incentives	A reduced corporate tax rate of 10% on export profits and the establishment of free zones provide a highly favorable fiscal environment.

Source: the authors based on the cited sources.

4.3.2. Institutional and Support Ecosystem

The Tunisian institutional framework is arguably the most integrated in the region. At the strategic level, the High Council for Export and Investment, under presidential authority, ensures that export promotion is a national priority. The cornerstone of the operational framework is the Export Promotion Center (CEPEX). Established in 1987, CEPEX has evolved into a comprehensive service provider with a strong private sector presence on its board, a network of 11 foreign offices, and regional branches within Tunisia (Bennour, 2004). Its most significant innovation is

the "House of the Exporter," a one-stop-shop that brings together representatives from all key bodies—ministries, customs, the central bank, and the export insurance company (COTUNACE)—under one roof. This dramatically reduces the administrative burden on exporters. This integrated model, combined with strong professional federations like UTICA and UTAP, creates a dense and supportive ecosystem that actively guides firms through the export process.

5. Discussion

The comparative analysis reveals marked differences in the architecture and effectiveness of export promotion systems across the Maghreb. Algeria's fragmented, state-centric model contrasts sharply with Morocco's FDI-driven sectoral specialization and Tunisia's mature, SME-focused integrated ecosystem. While prior studies have highlighted Algeria's slow progress in export diversification (Aouriri et al., 2024; World Bank, 2022), this research extends the literature by providing a granular, institution-level explanation through systematic comparison with its neighboring countries.

The findings underscore the central role of high-level strategic coordination, a core principle of institutional economics (North, 1990). Operational export councils in Tunisia and Morocco function as effective mechanisms for aligning public and private actors and sustaining political commitment—an institutional feature largely absent in Algeria, where the corresponding body has remained inactive. This gap helps explain the persistent fragmentation and weak strategic coherence identified in earlier analyses of Algeria's export support system (Benarous et al., 2021), reinforcing the argument that governance quality is a prerequisite for policy effectiveness.

Tunisia's experience illustrates more clearly why certain export promotion systems become institutionally effective. From the perspective of institutional economics (North, 1990), the success of Tunisia's export support framework lies not only in the existence of programs such as FAMEX, but in the coherence of the institutional architecture built around CEPEX and the "House of the Exporter." These institutions function as

coordination platforms that reduce transaction costs for firms by centralizing information, financial support, and administrative procedures. In line with the institutional perspective, this integrated structure facilitates predictable interactions between public authorities and private exporters, thereby lowering informational asymmetries and market-entry barriers that typically constrain SMEs. The empirically validated impact of the FAMEX program (Cadot et al., 2015; Gourdon et al., 2016) therefore reflects more than a successful policy instrument; it demonstrates how well-designed institutions can translate export promotion strategies into tangible firm-level outcomes. In contrast, the Algerian system, characterized by dispersed mandates and limited coordination, struggles to generate similar institutional complementarities, which helps explain the differing outcomes observed between the two countries.

From a theoretical perspective, this research contributes to the Export-Led Growth (ELG) literature by moving beyond simple export–growth correlations. It shows that the quality, coherence, and accessibility of export-support institutions act as critical mediating variables shaping policy outcomes. The Maghreb experience suggests that export promotion policies alone are insufficient unless they are aligned with the specific needs of the productive sector and embedded within a supportive institutional ecosystem. This finding reinforces contemporary views of competitive advantage, which emphasize the development of sophisticated productive capabilities over reliance on static comparative advantages (Hidalgo & Hausmann, 2009).

6. Conclusion

This study aimed to identify actionable lessons for Algeria by conducting a systematic comparative analysis of the export development and support systems in Tunisia and Morocco. The core research question focused on what could be learned from these neighboring experiences to enhance Algeria's non-hydrocarbon export performance. The main findings reveal that:

- Algeria's export promotion system suffers from significant structural weaknesses, including a lack of strategic coordination, a fragmented and under-resourced institutional framework, and restrictive financial regulations.
- In contrast, Tunisia has developed a highly integrated and accessible support ecosystem centered on SME needs.
- Morocco has successfully implemented a strategy of sectoral specialization, openness to FDI, and targeted support programs.
- The key differentiating factors are the presence of effective high-level governance bodies, sophisticated financial instruments, and specialized, accessible support agencies in Tunisia and Morocco.

Based on these findings, the study proposes a multi-pronged reform agenda for Algeria:

1. **Strengthen Governance and Coordination:** Operationalize the National Advisory Council for Export Promotion to provide strategic direction and ensure public-private alignment.
2. **Reinforce the National Export Promotion Agency (ALGEX):** Transform ALGEX into a comprehensive one-stop-shop modeled on Tunisia's "House of the Exporter," with regional and international branches.
3. **Develop Sophisticated Financial Instruments:** Introduce a matching grant fund similar to Tunisia's FAMEX and a robust credit guarantee fund inspired by Morocco's model to de-risk export financing.
4. **Expand Institutional and Sectoral Support:** Promote the formation of export consortia and establish specialized agencies for high-potential sectors like agri-food and technology.
5. **Enhance Trade Facilitation:** Simplify customs procedures, expand the AEO program, and develop modern free export zones to attract investment and streamline logistics.
6. **Boost Economic Diplomacy:** Strengthen the capacity of commercial attachés to provide actionable market intelligence and increase support for firms' participation in international trade fairs.

This study opens several avenues for future research. First, quantitative micro-level studies are needed to rigorously assess the impact of Algeria's existing support measures, which would provide an empirical baseline for reform. Second, in-depth qualitative case studies could explore the practical implementation of successful programs in the region, such as how Moroccan SMEs leverage export consortia or how Tunisian firms navigate the services of CEPEX. Finally, comparative research could be expanded beyond the Maghreb to include other resource-dependent economies that have successfully diversified their export base, offering a broader set of policy lessons for Algeria's path forward.

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