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Rethinking the SDGs after 2030: From Implementation Gaps to Sovereign Capabilities

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Key messages

1. The SDGs Face a Structural Implementation Gap

With only **18% of SDG targets on track**, the global agenda faces a **structural implementation gap**. The SDGs measure social outcomes well, but remain **weakly aligned with the productive, fiscal and institutional transformations** required in a **fragmented global economy**.

2. SDG Success Depends on Strong State Capacity

Post-2030 development must shift from **goal compliance to State capacity building**.
Outcomes depend on **fiscal power, effective public investment and robust social protection**.
Morocco illustrates this logic through **infrastructure investment and social protection reform**.

3. Africa Is Gradually Becoming a Space of Production and Transformation

Africa increasingly combines **demographics, strategic geography, natural resources, renewable energy, industrial bases and digital markets**.
This is progressively positioning parts of the continent **as spaces of production and transformation—not only trade**. Where policies align, this enables **BRICS and global partners to move toward co-investment, co-production and value-chain development**.

Outline

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1. Status Today: A System "Off Track" and the Return of Structural Divergence

2. The Moroccan Evidence: Lessons from Infrastructure and Social Protection Reforms.

3. The Path Forward: Redefining the Post-2030 Development Architecture.

1.

Status Today (Where We Stand in 2025)

Global SDG Performance: A System Off Track (2015–2025)

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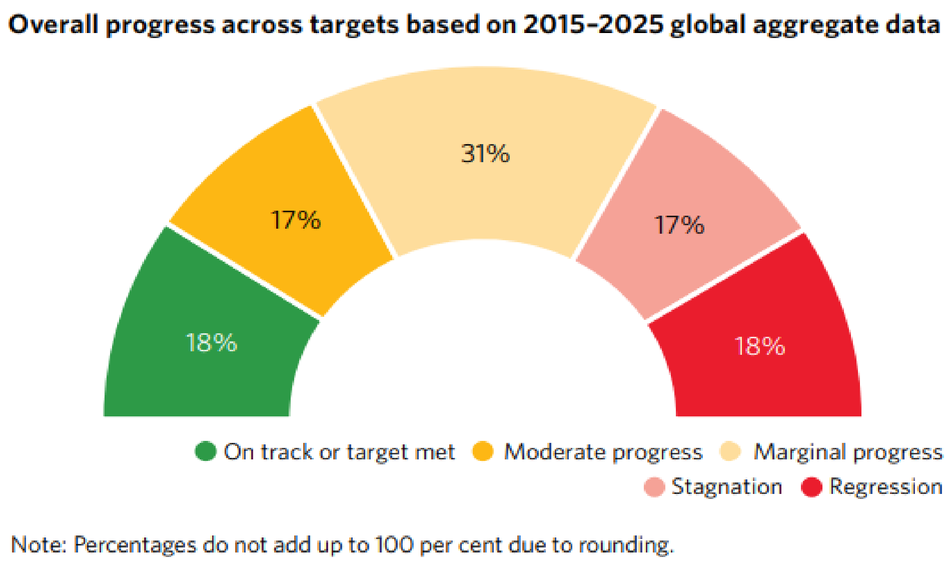
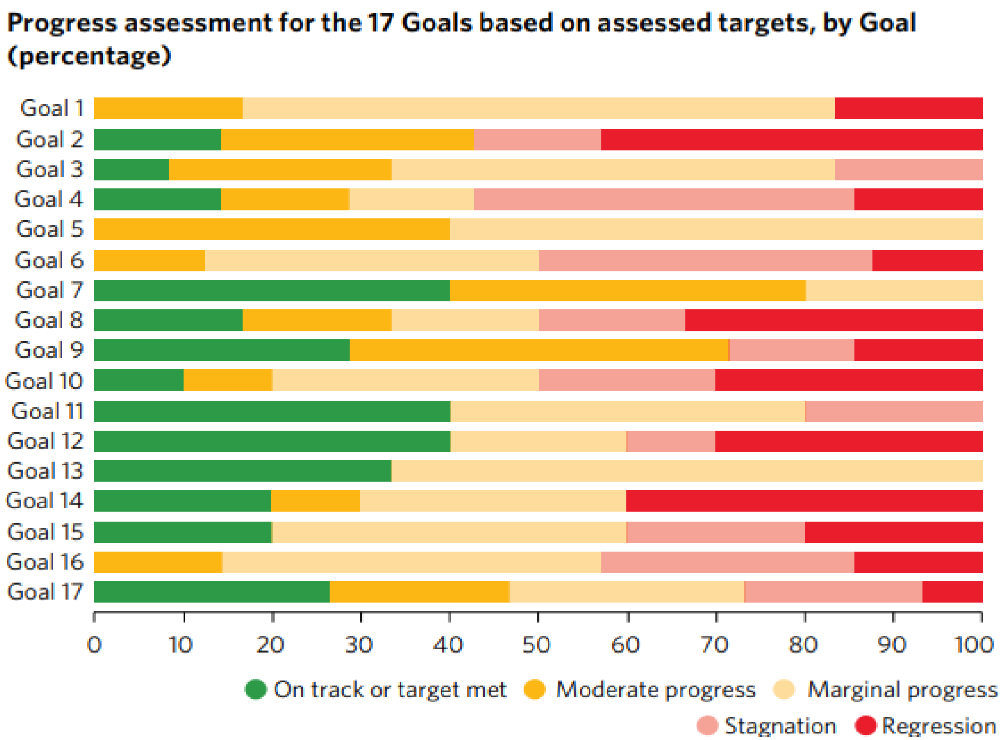
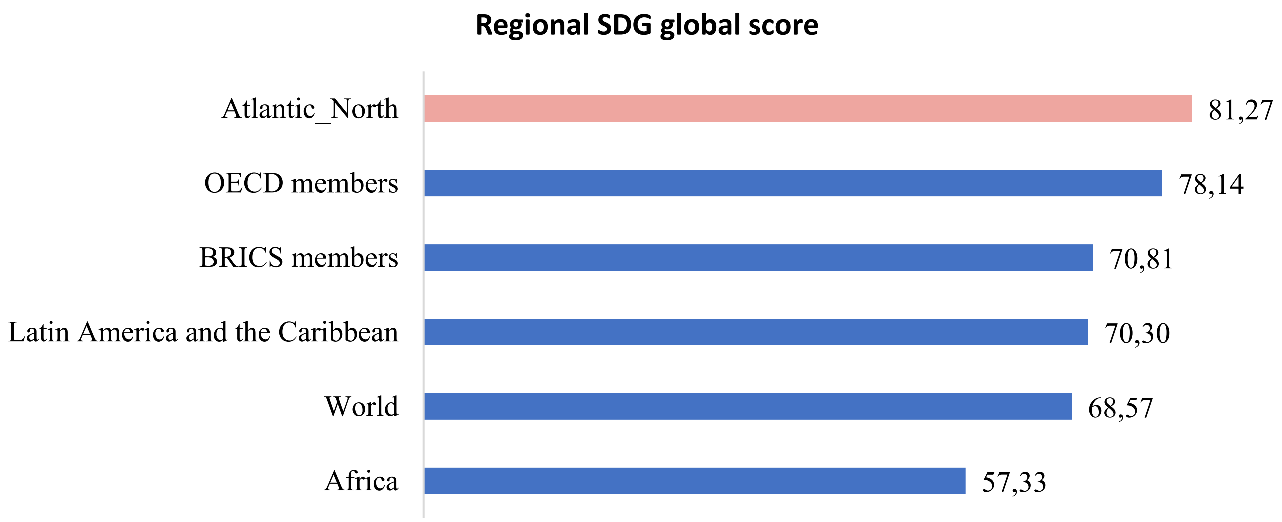
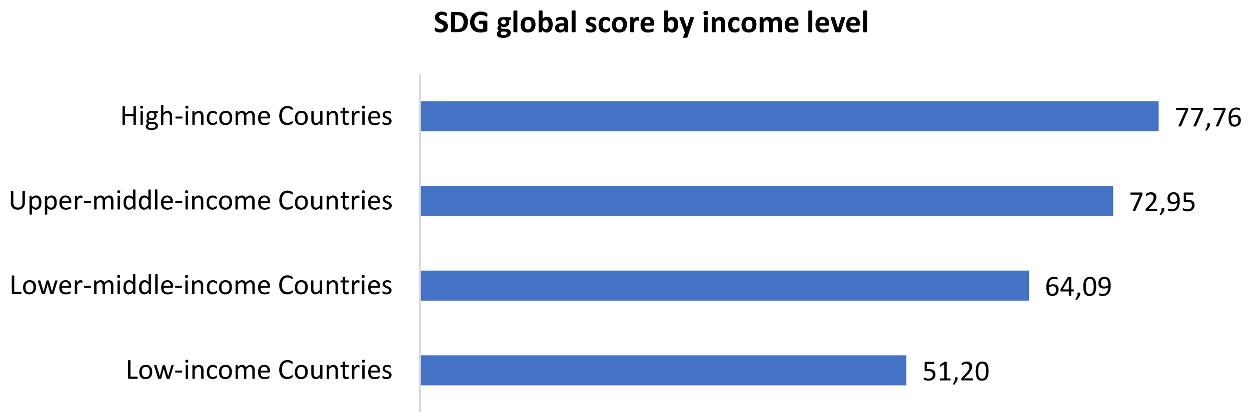




- **The world is still far off track from the 2030 Agenda.**
- **Only 35% of SDG targets show adequate progress** (18% on track, 17% moderate).
- **Nearly half of the targets are stalled** (31% marginal progress, 17% no progress).
- **18% of SDG targets have regressed below their 2015 baseline.**
- The SDG crisis is **not a temporary delay**, but a **systemic implementation failure**.
- **Growth alone is no longer sufficient** to generate sustained development outcomes.

The Great Divergence: Why the “Catch-Up” Model Is Broken





Source : Authors own elaboration, UN, 2025

•**Between 2000 and 2015, a phase of partial convergence did occur**, driven primarily by **China**, along with other **East and South-East Asian economies and parts of Latin America**.

•**Since the late 2010s (2018–2020), global development has entered a new phase of structural polarization.**

•SDG progress no longer follows a shared convergence path across regions.

•The world now exhibits a **two-speed development dynamic**: consolidation at the top, stagnation across large parts of low-income regions, particularly **Africa**.

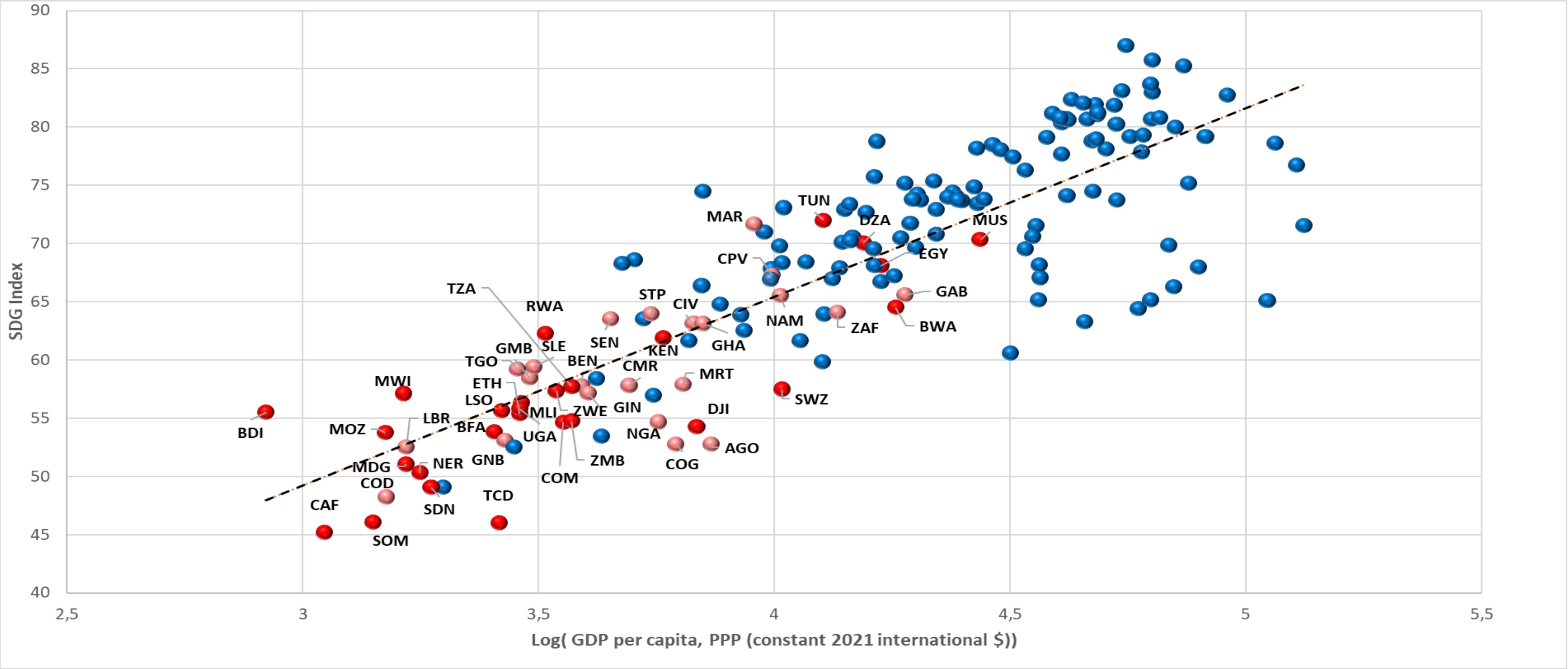
•The gap visible in 2025 reflects a **structural break**, not a temporary slowdown

Africa is highly exposed to **climate, health and geopolitical shocks,without equivalent access to global stabilizers**: international liquidity, **SDRs**, counter-cyclical fiscal buffers, and climate-risk insurance.

This structural asymmetry **severely constrains Africa’s ability to convert shocks into convergence and sustained development gains**.

The core challenge is not the lack of growth per se, but the weak conversion of income gains into inclusive social and environmental outcomes.

Link between SDG Index and living standards in 163 country, 2024



Source : Author's Own Elaboration, WDI, UN, 2025

Uneven SDG Progress in Africa: The Institutional Trap in Action

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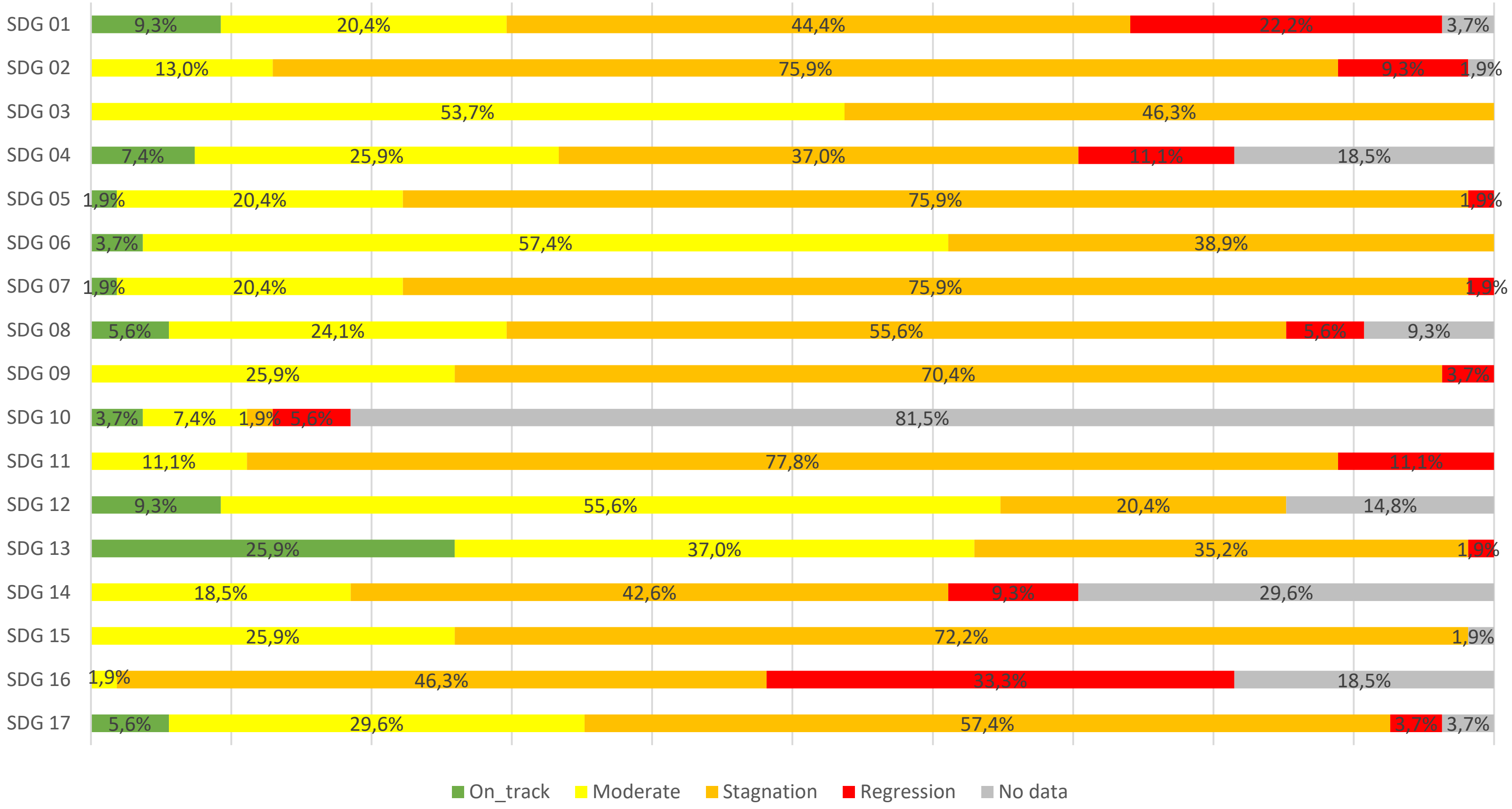
Progress assessment for the 17 Goals based on assessed targets, (%) Africa



Source : Author's Own Elaboration, WDI, UN, 2025

SDG 1	No Poverty
SDG 2	Zero Hunger
SDG 3	Good Health and Well-being
SDG 4	Quality Education
SDG 5	Gender Equality
SDG 6	Clean Water and Sanitation
SDG 7	Affordable and Clean Energy
SDG 8	Decent Work and Economic Growth
SDG 9	Industry, Innovation and Infrastructure
SDG 10	Reduced Inequalities
SDG 11	Sustainable Cities and Communities
SDG 12	Responsible Consumption and Production
SDG 13	Climate Action
SDG 14	Life Below Water
SDG 15	Life on Land
SDG 16	Peace, Justice and Strong Institutions
SDG 17	Partnerships for the Goals

Uneven SDG Performance Across Africa: A Persistent Development Gap

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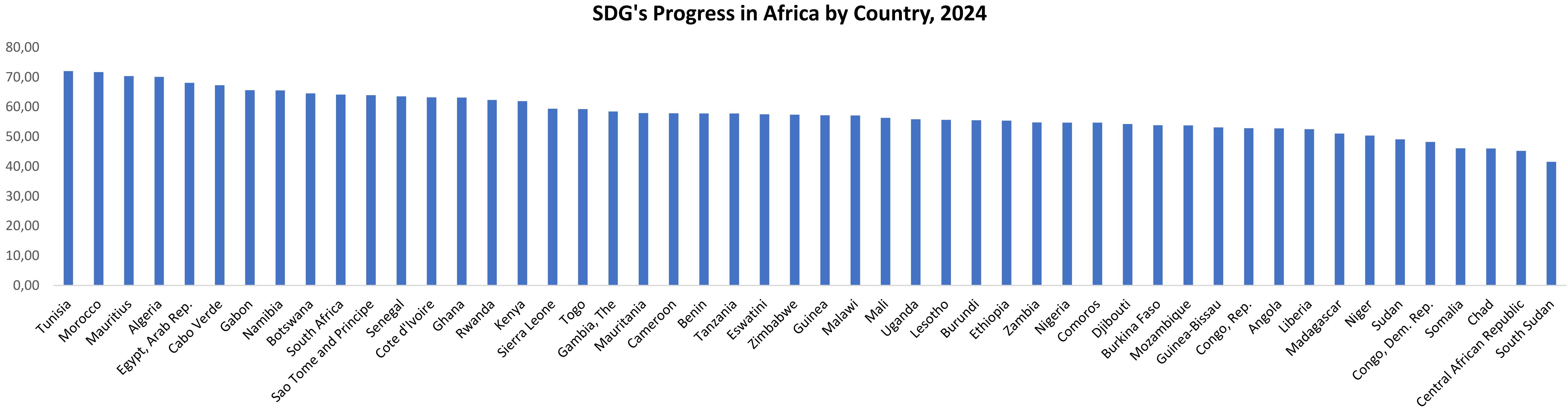

Source : Authors own elaboration, UN, 2025

•SDG outcomes remain deeply fragmented across Africa, with no clear convergence path.

•The gap between top and bottom performers exceeds 20 points, reflecting structural heterogeneity.

•High performers confirm institutional advantages, while low-performing ones face persistent structural traps.

2.
The Moroccan Evidence: Lessons from Infrastructure and Social Protection Reforms

Morocco’s Strategic Bets on the SDGs: What Worked, What Remains

1. A Strong Bet on Infrastructure — Largely Successful

Transport, ports, energy and logistics have been used as core development levers, generating productivity gains, stronger territorial integration, greater competitiveness, and improved shock absorption and trade resilience.

2. A Major Bet on Social Inclusion through Social Protection — A Structural Turn

Since 2021, the generalization of social protection has expanded health insurance, family benefits and income protection, while fiscal sustainability and effective targeting remain key challenges.

3. The Unfinished Bet: Equality and Effective Inclusion — A Persistent Challenge

Health, education quality, gender and territorial inequalities remain binding constraints, leading to unequal access to services and uneven social outcomes, while high informality continues to weaken redistribution and equal access.

Infrastructure quality is increasingly aligned with developed-country standards

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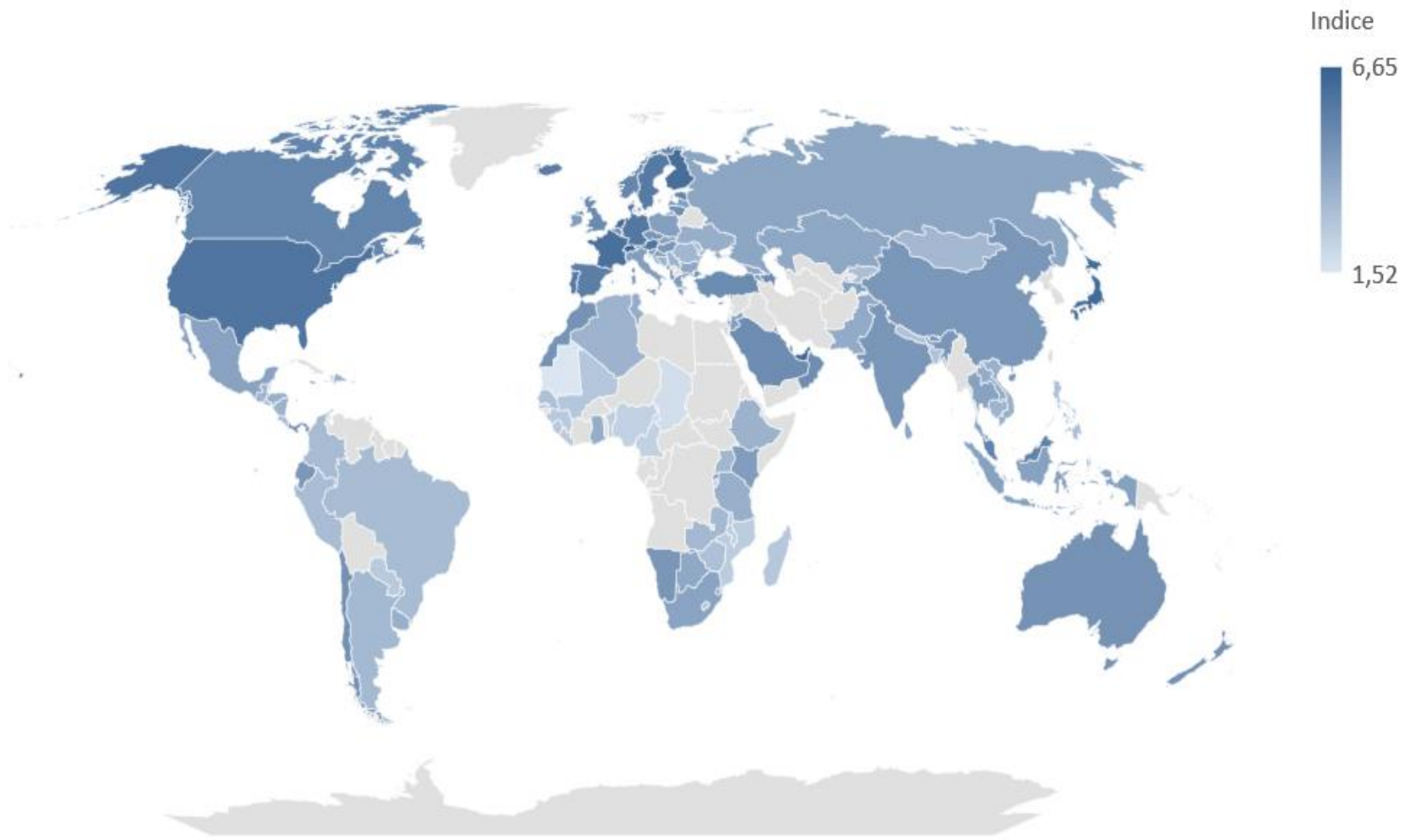
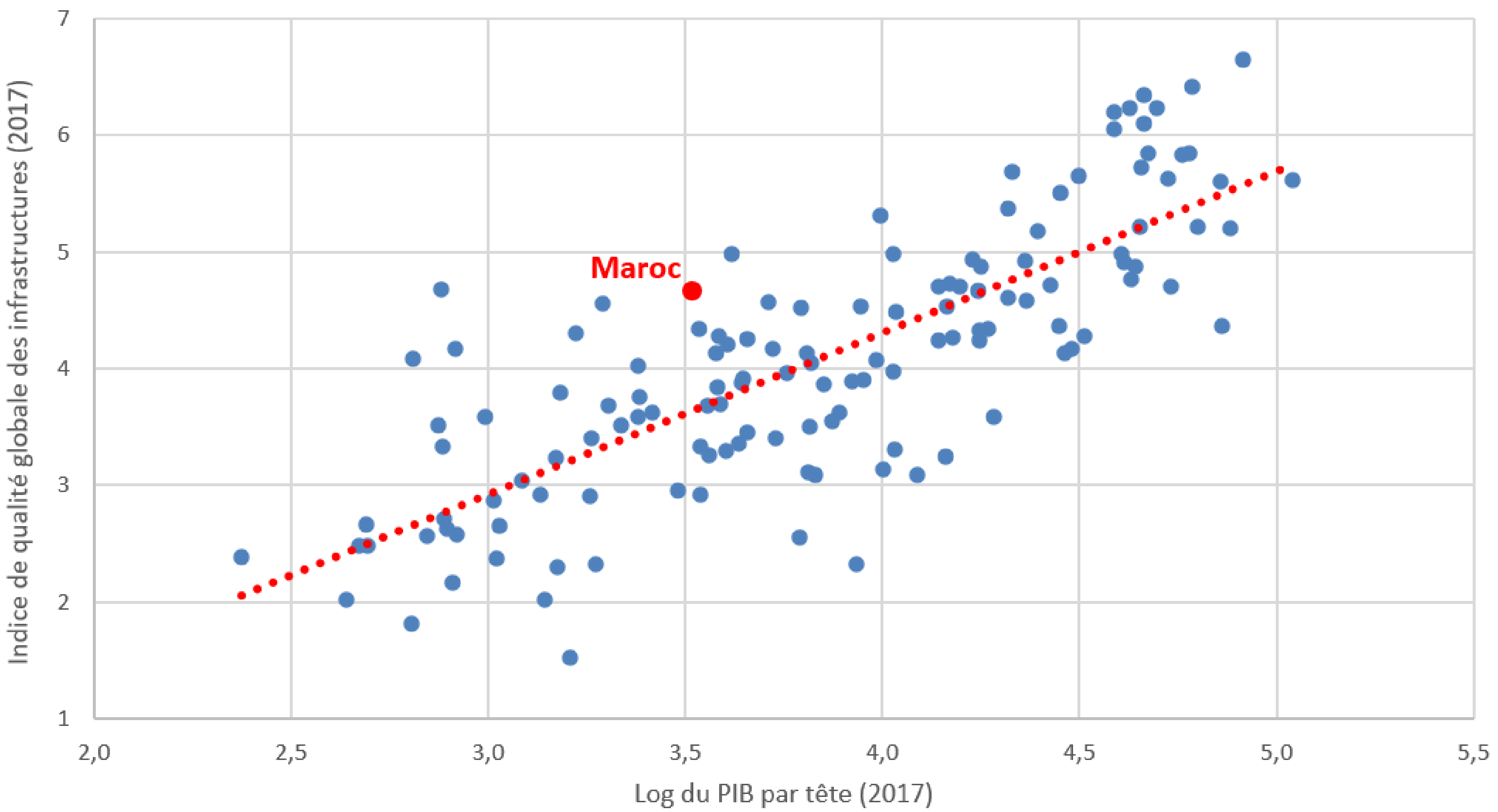
Overall Infrastructure Quality Index, scale from 1 to 7 (best), World



Source: Prosperity Data360, Banque Mondiale

Morocco's performance in terms of infrastructure quality remains well above that of many countries with comparable income levels, and even of some countries in higher income brackets.

Global Infrastructure Quality Index, scale from 1 to 7 (best), World



Source: Prosperity Data360, Banque Mondiale

Tanger Med Port has propelled Morocco among the world’s leading hubs in maritime connectivity, recording the fastest improvement globally since 2008.

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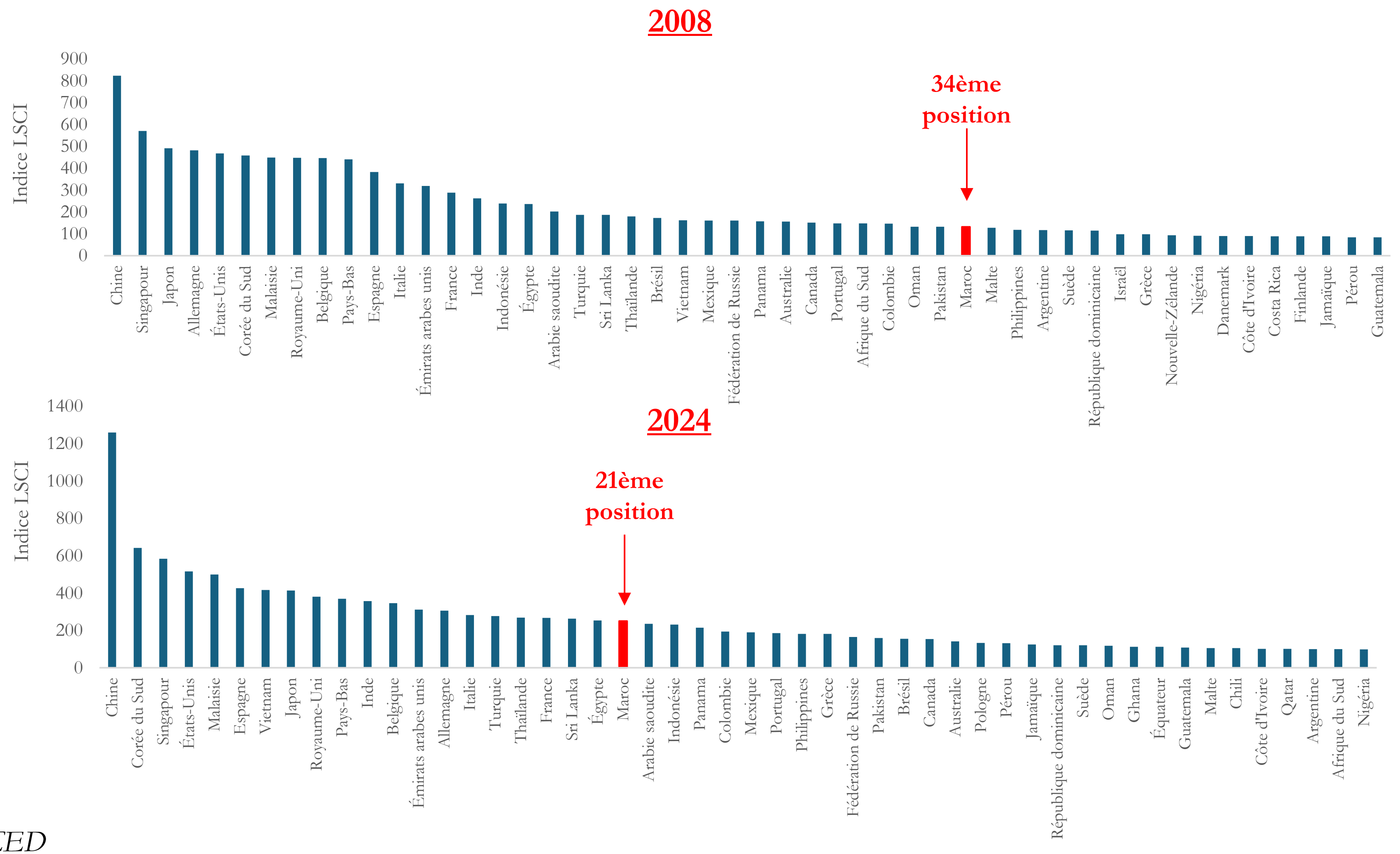
Liner Shipping Connectivity Index (LSCI): Morocco and selected top-50 peer countries — rankings, 2008 vs. 2024



Source: CNUCED

The Tiznit–Dakhla Expressway will significantly improve accessibility in Morocco's Saharan provinces, with gains exceeding 60% in Laâyoune, Es-Semara and Tarfaya.

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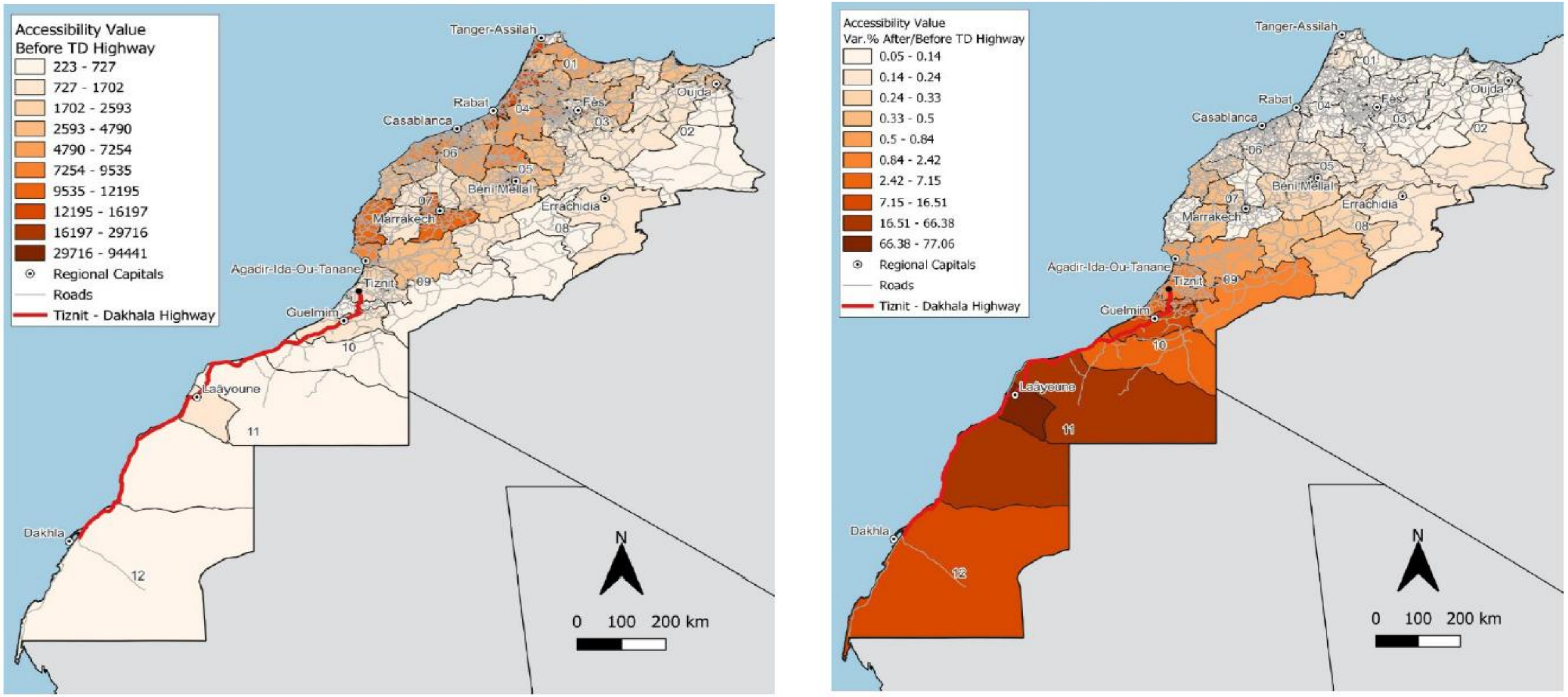
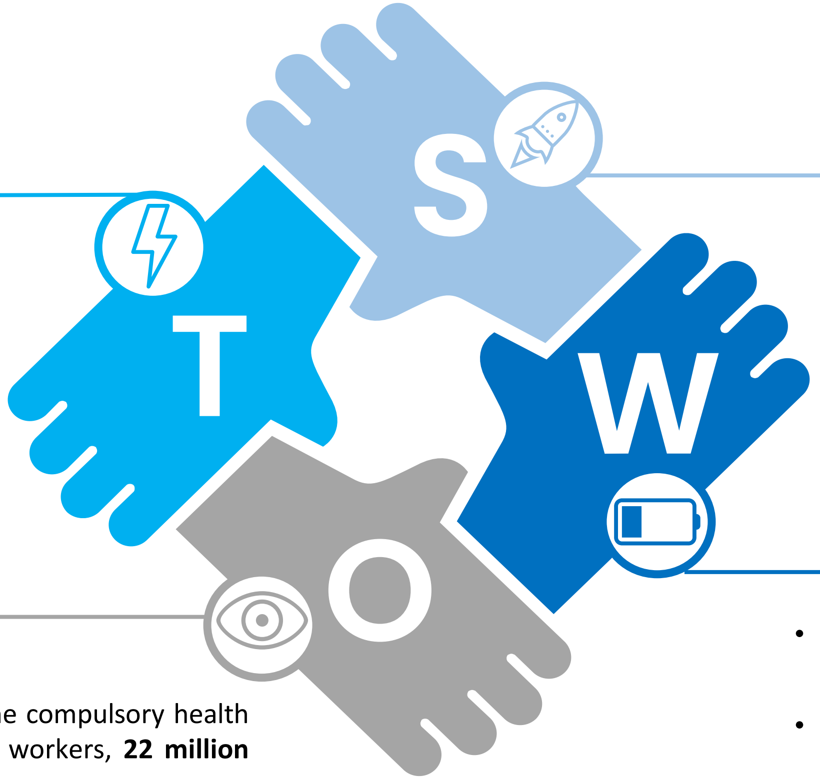
(a) Benchmark (million MAD) | (b) Impact (% change in the benchmark)



Source: Haddad et al. (2022). Valuing the Economic Cost of Remoteness: A Case Study of the Tiznit-Dakhla Expressway in Morocco. Research Paper - Policy Center for the New South.

(*) The underlying index defines accessibility as the potential for interaction opportunities between a production location i and a destination province j. Accordingly, the potential accessibility index Ai for any production location i is calculated as the sum of the value added of all destination provinces j, weighted by the inverse of the travel time between i and j.

SWOT SYNTHESIS OF THE SOCIAL PROTECTION SYSTEM IN MOROCCO



STRENGTHS

- Social protection programs contributed to a poverty reduction.
- A general awareness and unprecedented commitment from the policy makers side to improve the social protection system and extend its accessibility to broader groups of individuals.

WEAKNESSES

- Erratic/uneven protection against risks among private salaried workers.
- Low supply and uneven distribution of health care services and human resources between urban and rural areas and between regions.
- In some ways, still that income matters for workers' access to health care services. This partially defeats the purpose of social insurance.
- Almost 37,5 percent of health care services are paid by private salaried workers.

THREATS/Challenges

- Setting up a hospital infrastructure capable of supporting this accelerated social transformation;
- Efficiency of the RSU.
- Threshold effects.
- The labor market participation.
- Financial sustainability and durability.

OPPORTUNITIES

- Improve the functioning of the welfare state.
- Inclusion of the most vulnerable groups of people in the compulsory health insurance scheme (self-employed workers + informal workers, **22 million new beneficiaries**). (**10 MMDH**)
- Generalization of family allowances for **7 million** school-age children (**25 MMDH in 2024** and will rise to **29 MMDH per year** from **2026** onwards).
- Extension of pension (**5 million**) +the job loss compensation to everyone having a regular employment.
- The digitalization technologies should help improve the identification of beneficiaries.

The Unfinished Bet: Equality and Effective Inclusion in Morocco

- Over the past two decades, Morocco has achieved strong human-development gains, supported by sustained growth and major investments in infrastructure and social sectors.

- Poverty has declined and access to basic services has expanded across most regions.

- However, income inequality remains high: the top 10% earn around 12 times more than the bottom 10%.

- Territorial and rural–urban disparities continue to shape access to quality health care, education and economic opportunities.

- Gender gaps and labor informality further weaken the inclusive transmission of growth.

- Equity and inclusion are now placed at the heart of the New Development Model, as the central priority of the next development phase.

The next frontier of Morocco's development model is to ensure that growth becomes fully inclusive and territorially balanced, so that economic progress translates into equal opportunities for all.

3.

Beyond 2030 (The Post-2030 Development Agenda)

Why Convergence Has Weakened: A Global Structural Break

What Has Structurally Changed

2000–2015 | A Broad-Based Globalization Cycle

- Growth diffusion driven by:
  deep trade integration,
  large-scale FDI,
  global value chains,
  technology spillovers
- This model enabled **simultaneous catch-up across many emerging economies**.

Since 2018–2020 | A Fragmented Transmission System

The global diffusion engine has become **selective, volatile, and politically constrained**, due to:

- **COVID-19 shock**
- **Rising climate stress**
- **Geopolitical fragmentation**
  (sanctions regimes, declining trust in multilateralism, contraction of development aid, crisis of the international financial architecture)

Globalization no longer functions as a neutral convergence engine, but as a differentiated and strategic system.

What Ultimately Determines SDG Performance: Domestic Sovereign Capacities

At similar income levels, countries deliver radically different SDG outcomes because development is not an accounting exercise—it is an institutional construction. SDG performance is driven by three core sovereign capabilities:

1. Fiscal Sovereignty → Capacity to Finance the SDGs
The ability to mobilize domestic resources, ensure tax compliance, and manage public finances determines the **depth, stability and credibility of SDG financing**.
➞ Without fiscal power, SDG strategies remain structurally underfunded.

2. Productive Transformation → Quality of Growth
Economic diversification, industrial depth, energy and digital access determine whether growth generates **formal jobs, productivity and broad-based incomes**.
➞ Without structural transformation, growth weakly translates into SDG progress.

3. State Effectiveness → Policy Delivery on the Ground
Strategic planning, administrative capability and policy coherence determine whether **SDG commitments are executed or remain declarative**.
➞ Weak state capacity produces fragmented and uneven SDG outcomes.

SDG success is not driven by income levels, but by the strength of sovereign domestic capacities that transform growth into social and territorial progress.

What Now Determines SDG Outcomes: External Levers and Strategic Partnerships

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International cooperation does not mechanically produce SDG progress. Its impact depends on how it interacts with domestic strategies and institutions. Four structural conditions determine whether external engagement accelerates or distorts development:

1. Nature of External Finance → Long-Term vs. Short-Term Impact

Long-term development finance supports **structural SDG transformation**; short-term flows mainly support **macroeconomic stabilization**.

➞ The issue is less the volume of finance than its strategic orientation.

2. Technology Transfer → Productivity and Learning

Only partnerships that embed **co-production, learning-by-doing and local capability building** raise productivity and SDG efficiency.

➞ Technology without local absorption produces weak development spillovers.

3. Partnership Model → Type of Development Path

Infrastructure, industrial and energy partnerships support **structural change**; trade-only or extractive relations reinforce **dualization and dependency**.

4. South–South & BRICS Cooperation → Strategic Autonomy

When aligned with national strategies, South–South and BRICS partnerships strengthen **industrialization, energy transition and strategic connectivity**, while preserving policy space.

Beyond 2030: Redefining the Development Agenda (The New Architecture).

1. From Goals to Capabilities

The central constraint is no longer the definition of objectives, but **the capacity of States to deliver**. Post-2030 must prioritize:

- **Fiscal sovereignty and public investment capacity**
- **Institutional effectiveness and policy coherence**
- **Renewal of the social contract**

2. Rethinking International Cooperation

The next phase of development requires a shift:

- From **aid projects** → to **joint industrial and energy platforms**
- From **technology transfer** → to **co-investment and co-production**
- With **BRICS and strategic partners** as core transformation actors

3. From Universal Targets to Differentiated Pathways

Post-2030 strategies must fully integrate **structural heterogeneity**:

- Resource dependence
- Climate exposure
- Debt vulnerability
- Demographic dynamics
- Institutional capacity

→ **There is no single development trajectory after 2030.**

4. From Fragmented Financing to a Systemic Global Financial Pact

The current global financial architecture is increasingly **misaligned with climate, debt and development realities**.

Post-2030 priorities:

- **Reform sovereign debt architecture**
- **Scale up concessional climate & development finance**
- **Mobilize private capital under public strategic guidance**
- **Link climate, debt and development within a single financing framework**

5. From “Voice” to Co-Design of Global Rules

Representation alone is no longer sufficient. The New South must move:

- From **participation** → to **joint agenda-setting**
- From **rule-taking** → to **rule-shaping**
- Through the institutionalization of **African and BRICS platforms in norm-setting**

Promote jointly-designed standards reflecting diverse development pathways.

Thank You for Your Attention