



SOCIOECONOMIC PROFILE OF WEST AFRICA

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Acronyms and abbreviations

AfCFTA	African Continental Free Trade Area
CET	Common External Tariff
ECA	Economic Commission for Africa
ECOWAS	Economic Community of West African States
GDP	Gross Domestic Product
HDI	Human Development Index
HIPC	Highly indebted poor countries
ILO	International Labour Organization
IMF	International Monetary Fund
SDGs	Sustainable Development Goals
UNDESA	United Nations Division of Economic and Social Affairs
UNDP	United Nations Development Programme
UNESCO	United Nations Education, Scientific and Cultural Organization
WAEMU	West African Economic and Monetary Union
WAMZ	West African Monetary Zone

1. International economic environment

1.1. Global context and implications for the African continent

1. Global growth was robust in 2018, with the volume of economic activity increasing in more than half of the countries from 2017 to 2018. The economic growth rate was 3.2 per cent in 2018 compared to 3.1 per cent in 2017.
2. While many countries fared pretty well, the dynamics of economic activity varied according to region. Economic activity was generally brisk in the economies in transition (2.1 per cent in 2018, compared to 2 per cent in 2017); it stagnated in the developed economies (2.2 per cent in both 2018 and 2017), and slowed down somewhat in developing economies (4.4 per cent in 2018, compared to 4.5 per cent in 2017). The United States experienced stronger growth in 2018 than in 2017 (2.8 per cent, compared to 2.2 per cent). Growth in the eurozone and China was more sluggish than the previous year (1.8 per cent, compared to 2.2 per cent, and 6.6 per cent compared to 6.9 per cent respectively), although China has remained on a robust growth trajectory.
3. These positive developments notwithstanding, risks and uncertainties do remain, and have to do with the adverse effects caused by the trade disputes between the United States and China, tightening financial conditions in developed countries and latent geopolitical tensions, including the conflicts in the Middle East and their potential impact on the volatility of prices of strategic commodities such as oil.
4. Such risks and uncertainties can undermine economic activity, especially industrial production in developed and emerging countries, leading to a slowdown in demand for goods exported from Africa, and higher financing costs for ongoing investment programmes in country development plans. Global growth is expected to stabilize in 2019 at its 2018 level (UNDESA, 2019).

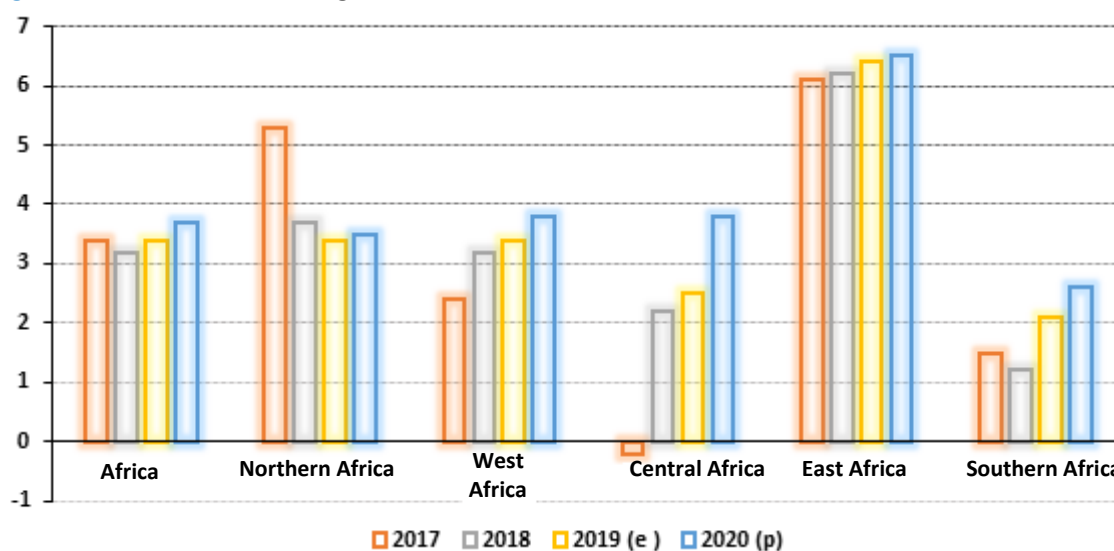
1.2 Recent developments and prospects in Africa

5. Economic activity remained more or less muted from 2017 to 2018, mainly due to moderate performance by the ore exporting countries. The economic growth rate was 3.2 per cent in 2018 compared to 3.4 per cent the previous year.
6. Economic activity on the continent has been driven more by the good performance of the economies of East, West and Central Africa, which have seen their real GDP grow faster than the previous year's. Economic growth rates in these regions were 6.2 per cent, 3.2 per cent and 2.3 per cent respectively in 2018, compared to 6.1 per cent, 2.4 per cent and -0.2 per cent in 2017 respectively. Growth has remained buoyant in East Africa, and increasingly so since 2016. Economic activity in this region of the continent is sustained by dynamic domestic demand and ongoing investment in infrastructure. Central Africa emerged from the 2018 recession thanks to a rebound in oil and natural gas prices and a strong showing of agriculture, manufacturing and services by the countries of this region.
7. On the other hand, moderate developments in economic activity in Southern and Northern Africa have contributed more or less to the slowdown in economic growth on the continent. Southern Africa posted the continent's lowest regional economic growth rate in 2018, (at 1.2

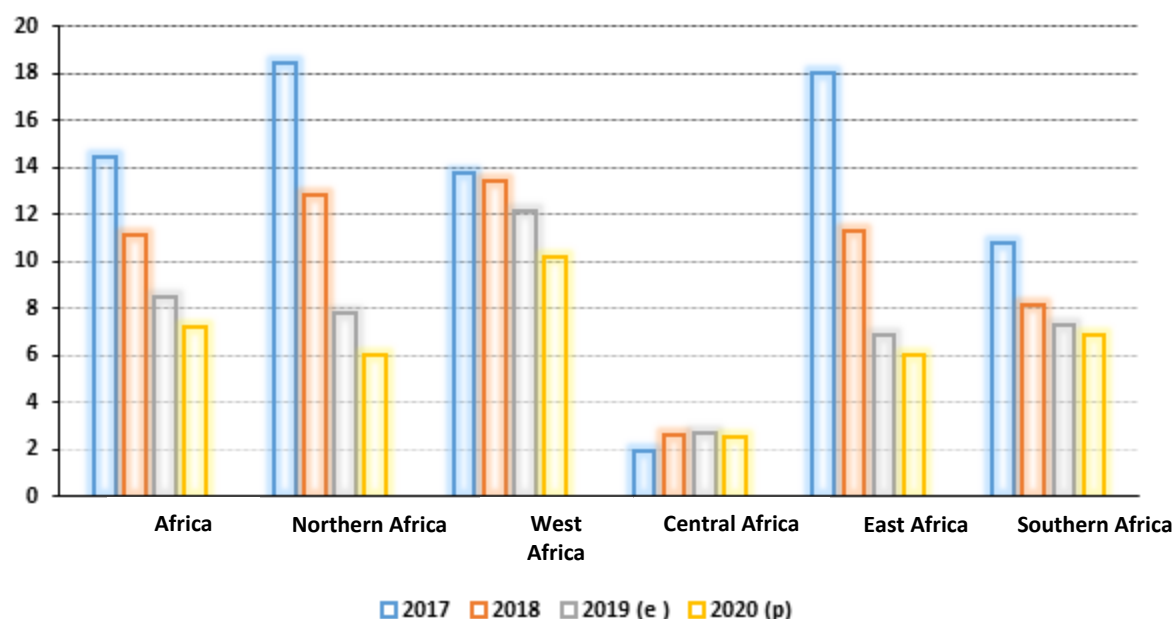
per cent, compared to 1.5 per cent in 2017) owing to poor performance by South Africa (0.8 per cent growth rate in 2018, compared to 1.3 per cent in 2017). Despite having benefitted from the recovery in the prices of its main commodities and an accommodating external environment, especially in the economies of Europe, North Africa, just like Southern Africa, achieved a lower economic growth rate in 2018 than in 2017 (3.7 per cent against 5.3 per cent) due to the slowdown in economic activity in Libya and poor performance by Sudan.

8. Inflation eased up generally in Africa in 2018. The inflation rate stood at 11.1 per cent against 14.4 per cent in 2017. West, North and East Africa were the major drivers of inflation on the continent in 2018. Each of these regions recorded double-digit inflation, with Southern Africa (8.1 per cent) and Central Africa (2.6 per cent) posting moderate levels.
9. Inflation is expected to fall significantly in Africa in 2019 and 2020 to stand at 8.5 per cent and 7.2 per cent, respectively, allowing for relative stability of currency exchange rates in most economies.
10. Economic growth rate forecasts and projections for the continent are 3.4 per cent for 2019 and 3.7 per cent in 2020. Buoyant economic activity in 2019 in Africa is likely to be driven by increasing domestic demand, massive investment in infrastructure, and increased oil production, with the rise in prices.

Figure 1: Recent economic growth trends in Africa (%)



Source: UNDESA (2019)

Figure 2: Inflation trends in Africa (%)

Source: UNDESA (2019)

2. Economic and social situation and outlook for 2020 in West Africa

2.1 Economic performance

11. The review of West Africa's economic performance will focus on economic developments, inflation, the state of public finance, the current account and regional integration.

2.1.1 Economic growth

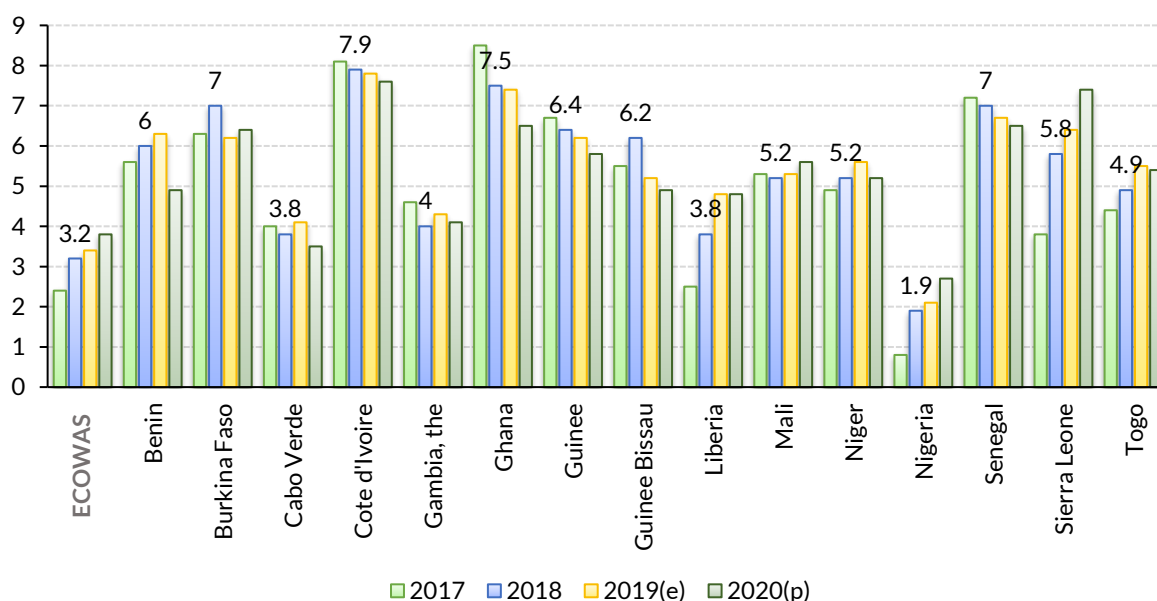
12. With GDP estimated at around US\$ 600 billion in 2018, ECOWAS accounts for about 24 per cent of Africa's GDP. Economic activity in the region accelerated in 2018, fueled by rising oil prices and production in Nigeria and Ghana, the dynamism of the services sector, and domestic demand and public investment in infrastructure. The economic growth rate was 3.2 per cent, compared to 2.4 per cent in 2017.
13. Economic activity in the community was strongly influenced by developments in Nigeria, which accounts for nearly 70 per cent of the region's GDP. Its growth rate grew from 0.8 per cent in 2017 to 1.9 per cent in 2018. Ghana, the second largest economy in the region, maintained a strong economic growth rate in 2018 (7.5 per cent) thanks to growing domestic demand, driven by the decline in the general price level.
14. Economic activity was also solid in 2018 in the WAEMU countries, most of which recorded growth rates above 5 per cent¹. Côte d'Ivoire achieved the best performance in the region, with a growth rate of 7.9 per cent. Burkina Faso and Senegal achieved growth rates of 7 per cent. After Nigeria, Cabo Verde and Liberia had the lowest economic growth rates in the Community

¹ Except for Togo, which recorded 4.9 per cent growth in 2018.

in 2018 (3.8 per cent). In Liberia, however, economic activity is on the upswing, following the recession in 2016.

15. According to forecasts and projections, economic activity in the region is expected to maintain its buoyancy in 2019 and 2020, with growth rates expected to reach 3.4 per cent in 2019 and 3.8 per cent in 2020, due to good prospects in the oil sector and in most of the economies of the area. Domestic demand is expected to remain robust, the terms of trade should improve, as should foreign direct investment (FDI) flows. In particular, Nigeria is expected to consolidate its performance in 2019 and 2020 with accelerated growth rates of 2.1 per cent and 2.7 per cent respectively.
16. It is also expected that other countries in the region will achieve high growth rates in 2019 and 2020. WAEMU countries, especially, are expected to record growth rates in excess of 5.5 per cent, sustained by increase in agricultural production, a burgeoning services sector and ongoing public investment. Ghana is also expected to achieve growth rates of over 6 per cent in 2019 and 2020 (7.4 per cent and 6.5 per cent respectively).
17. Quite apart from the risks from external factors (slowdown in global demand, fluctuations in oil prices, etc.), climatic variations (likely to adversely affect agricultural production and the price of food items), civil unrests and security threats, particularly in the Sahel region, are major events that could impede economic activity in the short and medium terms.

Figure 3: Real GDP growth rate of ECOWAS member States (%)

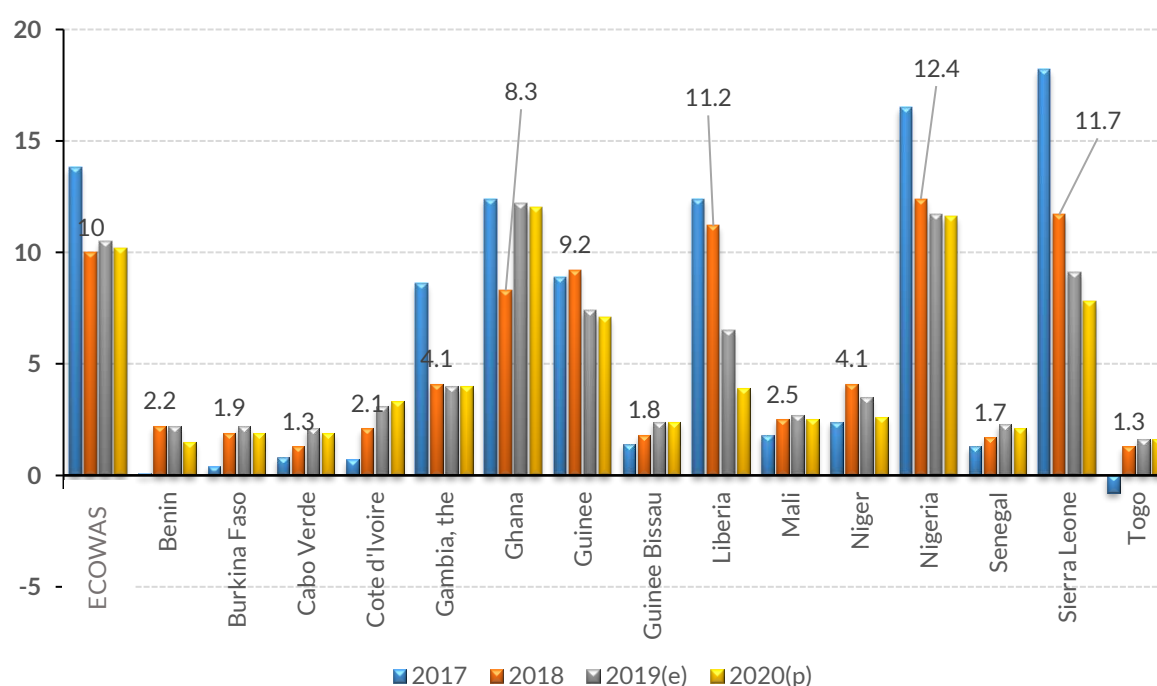


Source: ECA, sourced from UNDESA (2019)

2.1.2 Inflation

18. Inflation was been particularly high in the West African region in 2018, although slightly lower than in 2017 (10 per cent in 2018 compared to 13.8 per cent) due to inflationary pressures in Nigeria, Sierra Leone, and Liberia. Poor harvests, in particular, in the Sahel region, the rise in the price of imported goods and production cost due to the rise in oil prices were the factors that kept the general level of prices relatively high.
19. As usual, inflation was moderate in the WAEMU area and remained below 3 per cent in most countries. Out of the eight countries in the Union, only Niger (4.1 per cent) recorded an inflation level higher than the 3 per cent target for the WAEMU region in 2018. Most countries in the West African Monetary Zone (WAMZ) posted double-digit inflation rates. The inflation rate remained particularly high in Nigeria in 2018, despite the decline recorded, compared to 2017 (12.4 per cent against 16.5 per cent). As in the WAEMU countries, inflation was also controlled in Cabo Verde in 2018 (1.3 per cent).
20. In 2019, inflation is expected to remain relatively stable due to rising oil prices in Nigeria, which will help stabilize the exchange rate of the Naira, the Nigerian currency, and the restrictive monetary policy under way in the country². The inflation level, however, should remain above the maximum 10 per cent standard allowed for the ECOWAS macroeconomic convergence (10.5 per cent).

Figure 4: Consumer price (Annual average, variation in %)



Source: UNDESA, CBN and IMF (2019)

² The Central Bank of Nigeria has decided to maintain a stable (at 14 per cent) key interest rate despite current positive developments, due to uncertainties surrounding the global economy, including the trade dispute between the United States and China, two of the country's partners.

2.1.3 Public finance

21. Tax revenue (including grants) mobilization levels appear to be relatively low in the region, amounting to 9.6 per cent of GDP in ECOWAS in 2018 compared to 18.8 per cent of GDP in Africa. West Africa's poor performance in revenue mobilization is related to the relatively low level of tax revenue collection in Nigeria (about 6 per cent of GDP in 2018).
22. The West African budget deficit dipped slightly, from 5 per cent to 4.9 per cent of GDP between 2017 and 2018, a downward trend stemming from fiscal consolidation efforts in several countries in the region³.
23. Six out of the 15 ECOWAS countries saw their deficits decrease from 2017 to 2018, while only three countries (the Gambia, Guinea and Guinea Bissau, with budget deficits as a share of GDP of 2.5 per cent, 2.2 per cent and 2.6 per cent respectively) compared to seven in 2017, posted rates below the standard 3 per cent of GDP recommended under the ECOWAS convergence criteria. The countries with the highest budget deficit ratios in 2018 were Ghana (6 per cent), Liberia (5.1 per cent), Niger (5.9 per cent), Nigeria (5.1 per cent) and Sierra Leone (9.8 per cent).
24. With regard to indebtedness dynamics, community members seem to have fallen back into indebtedness since reaching completion point for the highly indebted poor countries (HIPC) initiative, for which 13 member States in the region were eligible⁴. The ECOWAS debt to GDP ratio for this region increased by nearly 15 percentage points over the past four years, from 20.3 per cent of GDP in 2015 to 35 per cent of GDP in 2018. Although well below the maximum threshold of 70 per cent adopted under the macroeconomic convergence framework, the pace of growth raised the risk of debt distress in some countries.
25. Debt levels of the countries in the region range from 28.4 per cent in Nigeria to 130 per cent in Cabo Verde. In addition to Cabo Verde, the Gambia (82.8 per cent), Ghana (71.2 per cent), Sierra Leone (79.2 per cent) and Togo (71.5 per cent) have debt levels exceeding 70 per cent.
26. Although the overall debt to GDP ratio is relatively low in countries such as Nigeria (28.4 per cent), debt service absorbs a considerable share of its tax revenue. In 2018, the amount of interest paid on domestic debt by the Nigerian Federal Government accounted for 60 per cent of its tax revenue (IMF, 2019).
27. Most countries in the region have limited fiscal space. Fiscal space is defined as the difference between the debt ceiling and a country's current indebtedness level.

³For example, fiscal consolidation measures in Togo mainly have to do with improving revenue collection and streamlining non-priority spending. Côte d'Ivoire has introduced measures to reduce fiscal risks by restructuring the national refinery and maintaining the ongoing restructuring of public banks. Mali has widened its domestic tax base, and is continuing modernization of the land conservation archiving system, upgrading its information system and clamping down on fraud and tax evasion.

⁴Cabo Verde and Nigeria had not benefited from the HIPC Initiative.

Table 1: Fiscal space of ECOWAS countries (percentage of GDP)

Geographical areas	Fiscal space (50% IMF ceiling for developing countries)	Fiscal space (70% ECOWAS ceiling)
Benin	-6.8	13.2
Burkina Faso	8.8	28.8
Cabo Verde	-80.0	-60.0
Côte d'Ivoire	1.2	21.2
Gambia, the	-32.8	-12.8
Ghana	-21.2	-1.2
Guinea	9.6	29.6
Guinea Bissau	-5.3	14.7
Liberia	9.9	29.9
Mali	13.1	33.1
Niger	3.7	23.7
Nigeria	21.6	41.6
Senegal	-0.4	19.6
Sierra Leone	-29.2	-9.2
Togo	-25.7	-5.7
ECOWAS	15.0	35.0

Source: ECA calculations

Note: Two threshold ceilings were considered - the one used by the IMF for developing countries (50 per cent of GDP) and the one selected under the ECOWAS macroeconomic convergence criteria (70 per cent of GDP).

28. Nigeria has the largest fiscal space in the region (21.6 per cent of GDP in 2018, while the debt ceiling is set at 50 per cent of GDP). Cabo Verde has the smallest fiscal margin (-80 per cent of GDP in the 50 per cent debt ceiling scenario).
29. Considering the 70 per cent indebtedness ceiling scenario within ECOWAS, 66.7 per cent of the countries in the region have a positive room for maneuver that can be used to finance economic and social development.
30. Cabo Verde, the Gambia, Ghana, Sierra Leone and Togo need to step up efforts to improve their fiscal space by mobilizing more tax revenue to keep debt under control.

2.1.4 External account

31. The current account balance is structurally in deficit in almost all countries in the region, widening at the Community level from 0.3 per cent of GDP in 2017 to 1.3 per cent of GDP in 2018. Over this period, the current account deficit of nine (Burkina Faso, Cabo Verde, Guinea, Guinea-Bissau, Mali, Niger, Senegal, Sierra Leone and Togo) of the 15 ECOWAS countries deteriorated further. Nigeria, on the other hand, posted a current account surplus, albeit lower than that of 2017 (2 per cent of GDP against 2.8 per cent in 2017). The worsening of the current account deficit in the region in 2018 was partly due to the contraction of the mining sector and the market for some agricultural products.

Table 2: Trends in major commodities exported by the region from 2017 to 2018

Product	Unit	Average price in 2017 in (US\$)	Average price in 2018 (in US\$)	Variation (in US\$)
Crude oil	Barrel	53	70	+17
Natural gas	MMBtu	5.7	7.7	+2
Coal	Metric ton	94.1	114.9	+20.8
Cocoa	Metric ton	2006.9	2244.8	+237.9
Cotton	Metric ton	83.6	93.3	+9.7
Palm oil	Metric ton	647.8	578.8	-69
Coffee	Pound	152.4	137	-15.4
Rubber	Pound	90.8	71.7	-19.1
Iron ore	Metric ton	71.1	69.6	-1.5
Gold	Ounce	1230	1285.9	+55.9
Uranium	Pound	21.7	21.7	+0
Aluminium	Metric ton	1967.7	2144.8	+177.1

Source: ECOWAS (2018) Note: MMBtu=Million British thermal units

32. In 2019, the deficit is expected to widen further to 1.7 per cent of GDP, owing to an even lower current account surplus in Nigeria (1%).

2.1.5 Regional integration: Macroeconomic convergence and trade integration

33. Since the establishment of ECOWAS in 1975, West Africa has had great ambitions for economic integration. The zone has been implementing a Common External Tariff (CET) since January 2015. Great strides have also been made in the area of free movement of goods and people, effective since 1999, as well as the implementation of common policies, including in agriculture, trade, statistics and environment. On the monetary side, the major prospect remains the objective of achieving the ECOWAS common currency by 2020. The performance of countries will be reviewed for the primary (4) and secondary (2) criteria, compliance with which, by end 2019, should facilitate accession to the single currency and the region's performance in intra-Community trade.

Table 3: Number of countries within ECOWAS that have met the convergence criteria

Criteria	ECOWAS standard	2016	2017	2018**
Primary rang				
Ratio of budget deficit, including grants to nominal GDP	≤ 3 %	4	7	3
Annual average inflation rate	< 10 %	11	11	12
Central Bank financing of budget deficit/previous year's tax earnings	≤ 10 %	13	12	14
Gross external reserve	≥ 3	13	14	15
Second rank				
Ratio of total public debt to nominal GDP	≤ 70 %	12	12	10
Nominal exchange rate variation	±10	12	12	13

**Projection

Source: ECOWAS (2019) and IMF (2018) reports

34. The budget deficit criterion remains the most difficult for countries to meet. Three out of 15 countries would be close to meeting it in 2018 compared to seven the previous year. In 2018, one additional country (Ghana) is added to the list of countries that meet the inflation criterion. The country's inflation rate dropped from 12.4 per cent in 2017 to 8.3 per cent in 2018.
35. As a result of improvements as part of consolidation of public spending, the number of countries that met the criterion of central bank financing of the fiscal deficit increased from 12 in 2017 to 14.
36. All the countries of the community have generally complied with the criterion of volume of gross external reserves in the month of import.
37. With regard to the secondary criteria, 10 out of 15 countries have a public debt to GDP ratio below the threshold of 70 per cent allowed. Cabo Verde, the Gambia, Ghana, Sierra Leone and Togo have rates above the standard for this indicator.
38. The change in the nominal exchange rate has been moderate. Thirteen out of 15 countries managed to maintain the volatility of the nominal exchange rate of their currency within accepted norms. In particular, the currency of Sierra Leone regained relative stability in 2018.
39. Intra-community trade remains relatively low, accounting for only about one-tenth (10.6%) of the region's trade with the outside world (ECOWAS, 2018)⁵. It has increased only marginally over nearly 20 years, by about 3 percentage points compared to 1996 when it accounted for 7.7 per cent of the community's total foreign trade.
40. The poor development of industries, in particular, the manufacturing sector in most economies, and the deficit and poor quality of infrastructure (energy, transport, telecommunication, etc.) partly explain why intra-Community trade is not robust.

⁵ Trade between the Community and the outside was estimated at \$155 546.2 million in 2017 (ECOWAS, 2018).

Table 4: Trends in the contribution of ECOWAS member States to intra-regional trade (%)

Country/flow	2013-2017 average in %		
	Exports	Imports	Imports/Exports
Benin	1.3	4.2	2.6
Burkina Faso	2.8	8.6	5.5
Cabo-Verde	0.1	0.7	0.3
Côte d'Ivoire	26.7	23.2	25.1
Gambia, the	0.6	1.5	1.0
Ghana	11.0	5.7	8.6
Guinea	3.1	2.7	2.9
Guinea-Bissau	0.0	0.2	0.1
Liberia	0.3	4.0	1.9
Mali	3.2	15.4	8.7
Niger	3.2	3.7	3.4
Nigeria	32.2	9.3	21.8
Senegal	9.3	7.7	8.6
Sierra Leone	1.1	11.0	5.6
Togo	5.1	2.2	3.8
Total ECOWAS	100.0	100.0	100.0

Source: ECOWAS (2018)

41. Mineral products occupy a prominent place in intra-Community trade, accounting for 41.5 per cent of exports within the community and 62.9 per cent of imports, from 2015 to 2017. Food industry products make up the second category of goods most often traded among the countries of the region (8.8 per cent of the total amount of exports and 7.3% of that of imports).
42. Côte d'Ivoire (25.1 per cent) followed by Nigeria (21.8 per cent) are the two countries that have been contributing the most to intra-regional trade for several years.
43. The forthcoming implementation of the African Continental Free Trade Area (AfCFTA) agreements is expected to have an impact on the volume of trade within the region. So far, 52 African States, including 13 of the community's 15 States, have signed the agreement establishing the AfCFTA, while 22, including nine ECOWAS countries, have ratified it⁶. Nineteen African countries have already submitted their instruments of ratification with the African Union. Three additional submissions are needed to reach the 22 required to make continental free trade effective. Negotiations are ongoing within ECOWAS to work out measures to eliminate customs duties and charges having equivalent effect on trade, rules of origin of goods and specific commitments for trade in services.

2.2 Social performance

44. The subregion continues to make relatively little progress at the social level. Poverty rates remain high in many countries in the region. Many populations continue to have limited access to quality basic social services. Health indicators remain alarming in some countries, despite the strides made in reducing infant and maternal mortality. Also, despite increased access to education, many children drop out of school early, not having acquired even the minimum skills.

⁶ Côte d'Ivoire, the Gambia, Ghana, Guinea, Mali, Niger, Senegal, Sierra Leone, Togo

All these could hamper the region's ability to adequately harness its demographic dividend. This part of the report examines the social performance of ECOWAS.

2.2.1 Population

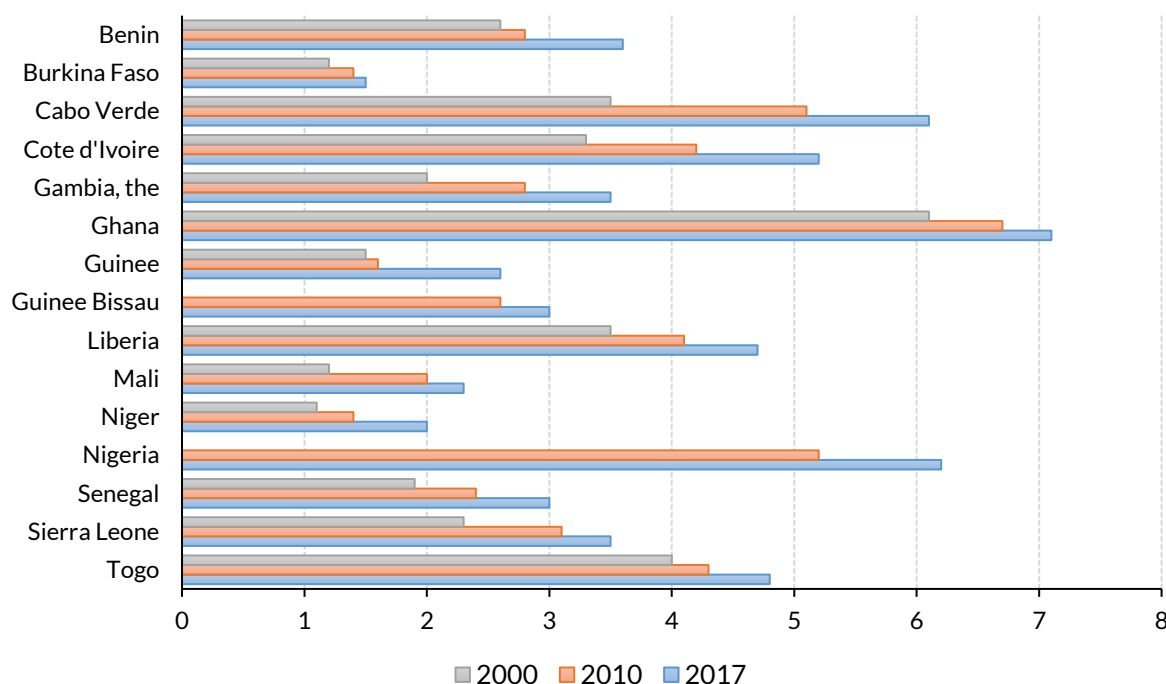
45. The population of West Africa was estimated at 367.6 million in 2017, with Nigeria accounting for almost half the region's population (190.9 million in 2017)⁷. The population of the region is extremely young, 44 per cent under 15 years of age, a proportion that rises to almost 60 per cent when the age is pushed to 25 years. The demographic dependency ratio is estimated at 87.2 per cent. It suggests that a working person, aged between 15 and 64, living in the community, is responsible for 0.872 person. The situation has changed little since the beginning of the 2000s (last 17 years) when it was estimated at 88.7 per cent, reflecting a relatively slow demographic transition in the region, tied to fertility rates that are still high in most countries. The total fertility rate is more than five children on average per woman in five countries of the community and more than four children per woman in eight other countries. Niger is the country with the highest fertility rate in the world (7.2 children per woman on average)⁸.
46. Apart from the consumption potential that current demographic trends in the region represent, one of the major challenges facing the community is education. The current educational performance in the region, as measured by access indicators, appears to be relatively low in many countries and declining in others. For example, gross primary and secondary school enrolment rates in Nigeria (the most populous country in the Community), dropped from 94 per cent to 84.7 per cent, and from 56.2 per cent to 42 per cent, respectively, from 2013 to 2016. Dropout rates are also high, while the average number of years of schooling is particularly low. In 2017, it was four years in nine countries in the region (Benin, Burkina Faso, the Gambia, Guinea, Guinea Bissau, Mali, Niger, Senegal and Sierra Leone)⁹.
47. Students hardly receive quality training and leave school without acquiring the minimum skills required. Only 11.9 per cent of children reach the minimum reading threshold and only 12.7 per cent reach this threshold for arithmetic at the end of the primary cycle in Mali. These performances are still much lower in Niger, where they stand at 8.5 per cent for reading and 7.7 per cent for arithmetic. In Côte d'Ivoire, only 47.9 per cent of children reach this threshold in reading and 26.9 per cent in arithmetic.

⁷ World Bank data (World development indicators, 2018))

⁸ According to World Bank estimates (World Development Indicators, 2018)

⁹ UNDP data (2017) on the HDI

Figure 5: Trends in average number of years of education in ECOWAS countries

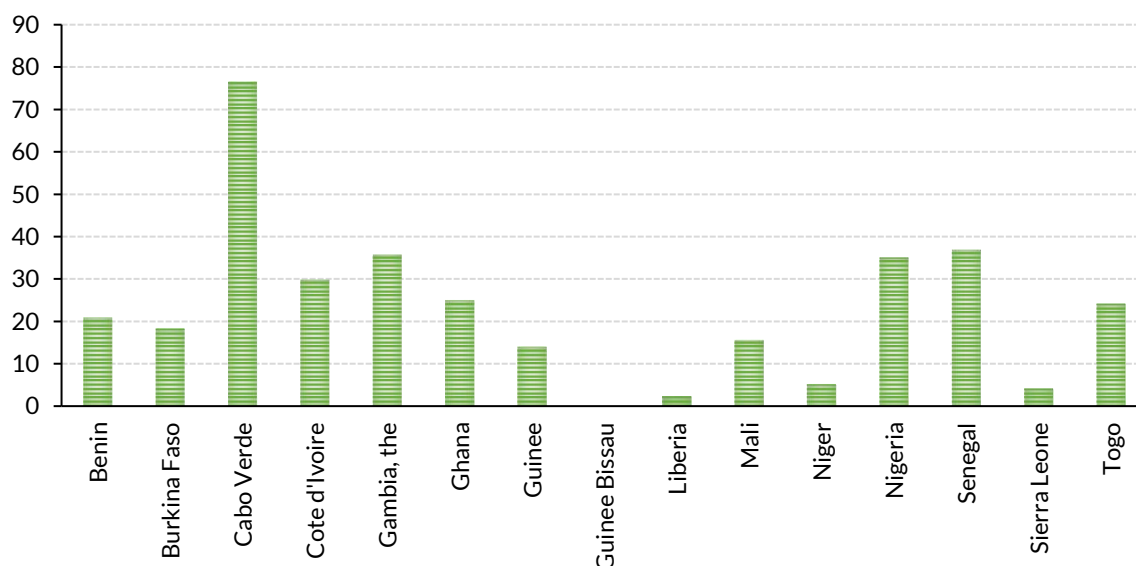


Source: ECA from UNDP data (2018)

Note: Year 2000 data not available for Nigeria and Guinea-Bissau

48. Many schools in the region do not have adequate educational facilities. For example, apart from Cabo Verde (76.5 per cent), less than 40 per cent of primary schools have access to energy in all other countries in the community, with significant variations between countries, suggesting that learners do not have the same opportunities to access quality education services in the region.

Figure 6: Percentage of schools in ECOWAS with access to electricity



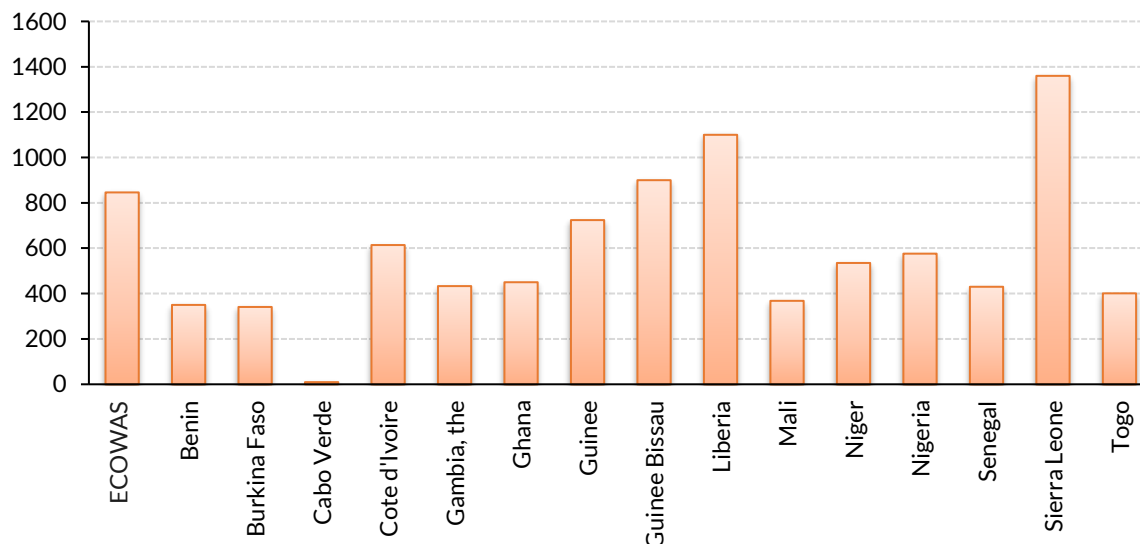
Source: ECA, from UNESCO data

Note: No data available for Guinea-Bissau

49. Health infrastructure is lacking in most countries, while health personnel and many health indicators are not adequate. Countries such as Sierra Leone, posted record levels for maternal

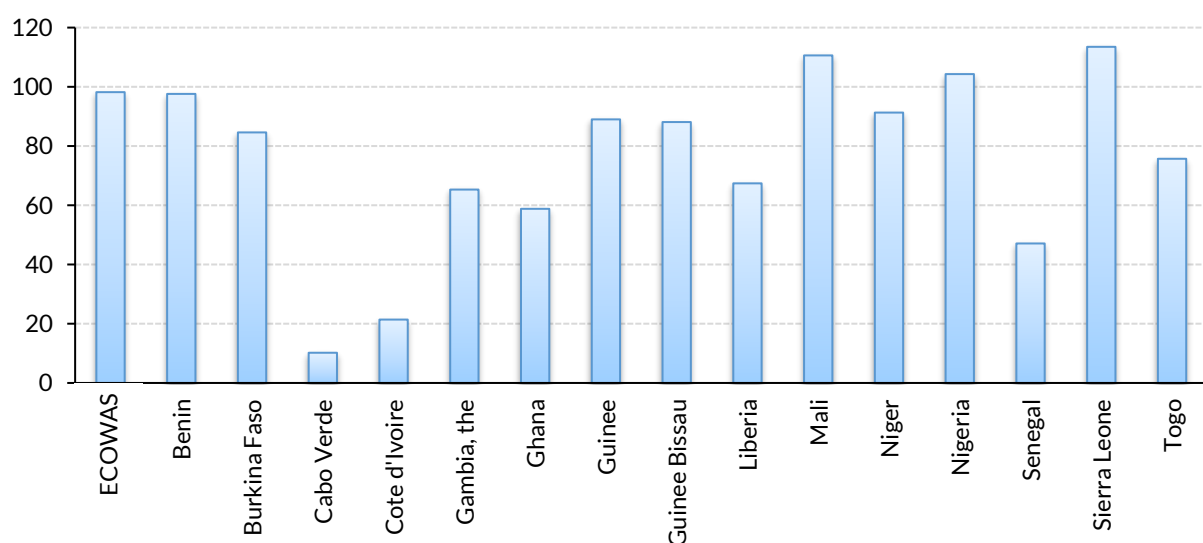
mortality (1360 deaths per 100,000 live births). Of all the regions for which data are available, the West African region has the highest under-five mortality rate (91 deaths per 1,000 live births compared to 59 deaths in East Africa, 31 in North Africa and 40 deaths per 1,000 live births in Southern Africa).

Figure 7: Mortality rate in ECOWAS countries (no. of cases per 100,000 live births)



Source: ECA from World Bank data (World Development Indicators, 2018) and UNDP SDG data

Figure 8: Under-five child mortality rates within ECOWAS (no. of cases per 1000 live births)



Source: ECA, from World Bank data (World Development Indicators, 2018) and UNDP data on SDGs

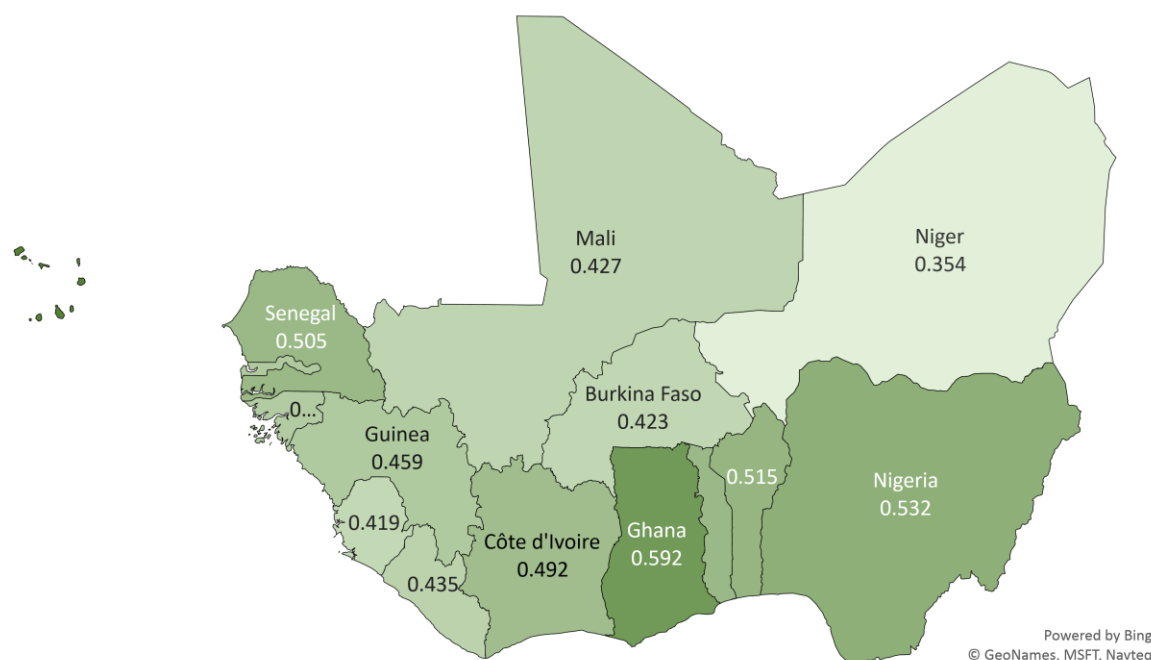
50. Major efforts should be made at the social level to enable the region to harness the demographic dividend.

2.2.2 Human Development Index

51. The 2018 Human Development ranking shows that 13 of the 15 ECOWAS countries fall into the low human development category. Only Cabo Verde (125th) and Ghana (140th) are in the category of medium human development countries.

52. The average human development index of the region is the lowest on the continent. It is estimated at 0.481 in 2017 against 0.486 in East Africa, 0.545 in Central Africa, 0.614 in Southern Africa and 0.654 in North Africa. The poor human development showing by the countries of the Community demonstrates the need for them to intensify efforts to promote inclusive growth and improve citizens' access to quality health and education services.

Map 1: Human development score of countries in West Africa, 2017

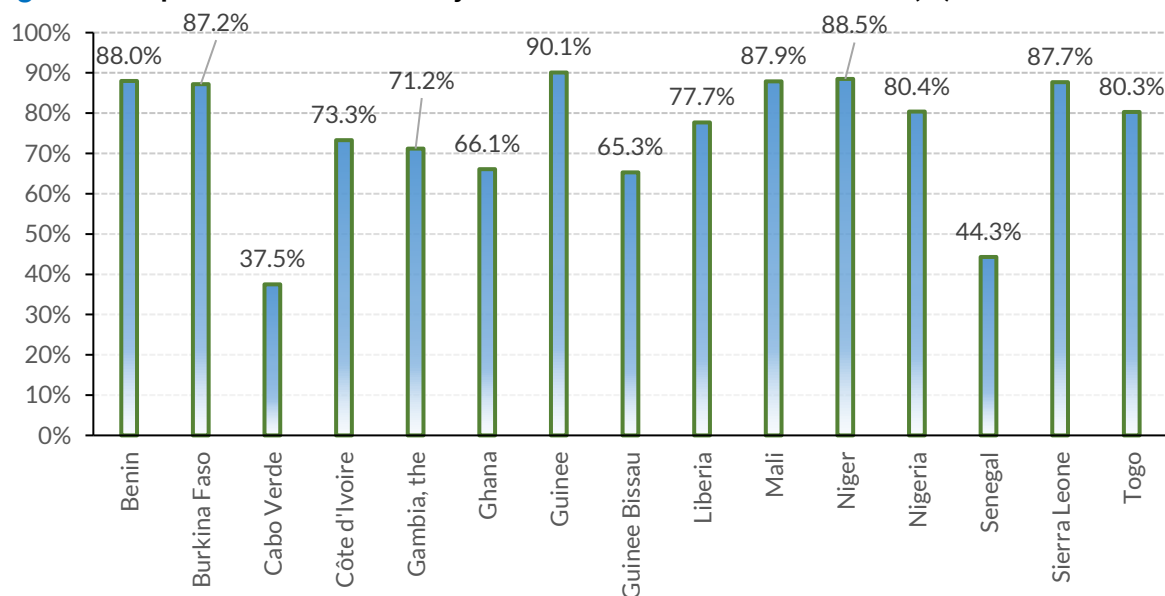


Source: ECA from UNDP data, 2018

2.2.3 Employment and poverty

53. Unemployment rates are low in all the countries of the region. At the regional level, it is estimated at 5.3 per cent in 2018. However, most of the jobs created are not decent. The majority of the population are self-employed (61.7 per cent in 2018) and mainly work in the informal sector.
54. Vulnerable employment rates in the region are relatively high. Many workers are unable to provide for themselves and their families, and are at a high risk of facing financial difficulties they cannot cope with. In 2018, nearly 38.4 per cent of working-age individuals employed in the region were considered extremely poor (living on less than \$1.90 per day) and 63.3 per cent were considered poor (living on less than \$3.10 per day).
55. The proportion of vulnerable jobs ranges from 37.5 per cent, in Cabo Verde to 90.1 per cent, in Guinea, in 2017. Eleven out of the 15 countries in the Community have vulnerable employment rates above 70 per cent. Besides Cabo Verde, only Senegal has a vulnerable employment rate below 50 per cent (44.3 per cent). 80.4 per cent of workers are engaged in vulnerable jobs in Nigeria, 66.1 per cent in Ghana and 73.3 per cent in Côte d'Ivoire.
56. The proportion of individuals engaged in paid jobs, generally of better quality, is relatively low in the Community (19.7 per cent in 2018).

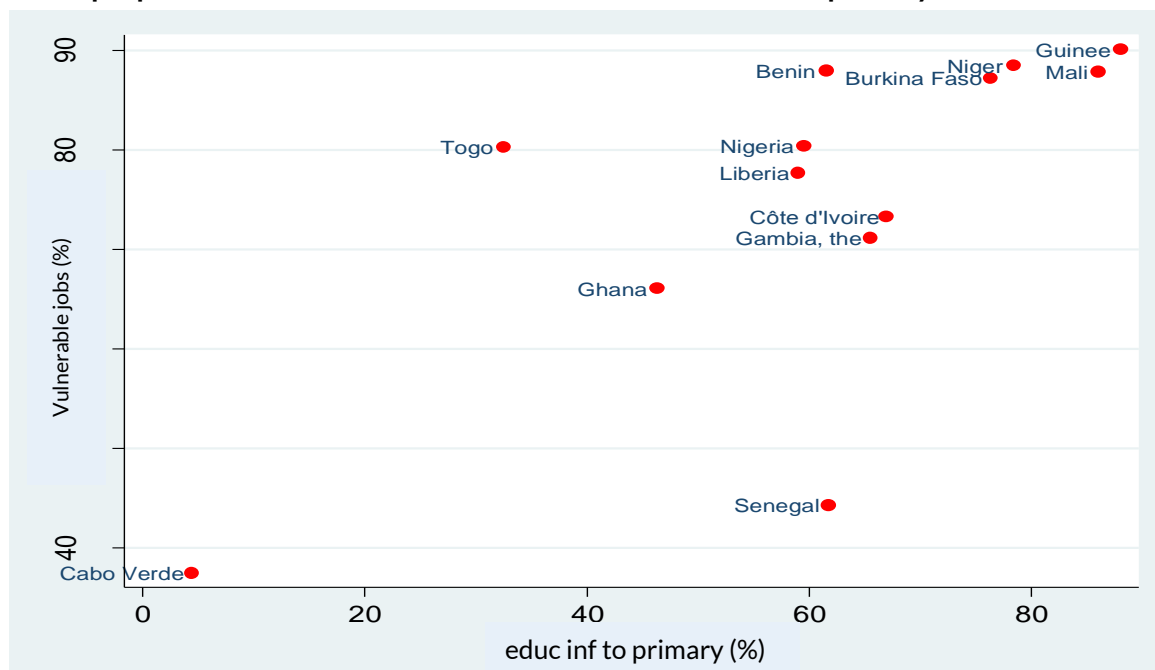
Figure 9: Proportions of vulnerable jobs in ECOWAS countries in 2017 (%)



Source: ECA, based on UNDP data (2017)

57. Vulnerable employment levels in the economies of the region are positively tie in with the low level of education of the labour force. Many people enter the labour market without the minimum qualification required. For example, 88 per cent of workers in Guinea (which has the highest rate of vulnerable employment in the region) did not complete primary education compared to 4.4 per cent in Cabo Verde (which has the lowest vulnerable employment rate).

Figure 10: Correlation between the rate of vulnerable employment in ECOWAS countries and the proportion of workers whose level of education is below primary level



Source: ECA, based on data from UNDP (2017) and ILO (2018)

Note: Data on the level of education of the labour force are not available for Guinea Bissau and Sierra Leone

58. The primary and tertiary sectors employ the highest proportions of people in the region, representing 44.1 per cent and 43.3 per cent respectively in 2018 against 12.7 per cent for the secondary sector. Increased investment in education could therefore help to raise the quality of jobs available to the region's populations and improve their standard of living.

2.2.4 Gender equality

59. Gender inequality still persists in West Africa, despite progress made by most countries in terms of women's participation in the economic and social sectors. With the exception of Senegal and Ghana, the other countries in the region for which data is available, rank among the bottom 20 in the 2017 UNDP Gender Inequality Index, with Mali, Côte d'Ivoire and Liberia recording the highest rates of inequality and ranking 157th, 155th and 154th out of 160 countries¹⁰. Gender inequality is measured based on maternal mortality ratio, fertility rate of women between 15 and 19 years old, percentage of seats in parliament reserved for women, access to secondary education and labour force participation rate of women.

60. In terms of political representation, women are still under-represented, especially in parliament. Senegal is the only country that has a female representation above the continent's 23.6 per cent average. Following the country's law on gender parity in politics adopted in 2010, women in politics accounted for 41.8 per cent in 2019, ranking it 11th in the world. Performances of the other countries range from an average of 23.6 per cent, in Cabo Verde, to as low as 5.6 per cent, in Nigeria (IPU, 2019).

61. In education, gender gaps in school enrolment rates have been reduced, with exceptions recorded for Cabo Verde, Senegal, the Gambia and Sierra Leone which show gender parity, in favour of girls, for some educational cycles. At the higher education level, Cabo Verde is the only country in the region that has been able to completely eliminate inequalities between boys and girls in terms of access to training. At the secondary level also, with Senegal, it has made the greatest progress in reducing gender inequality. At the primary level, Senegal, the Gambia and Sierra Leone are the only three countries in the region to have achieved this goal.

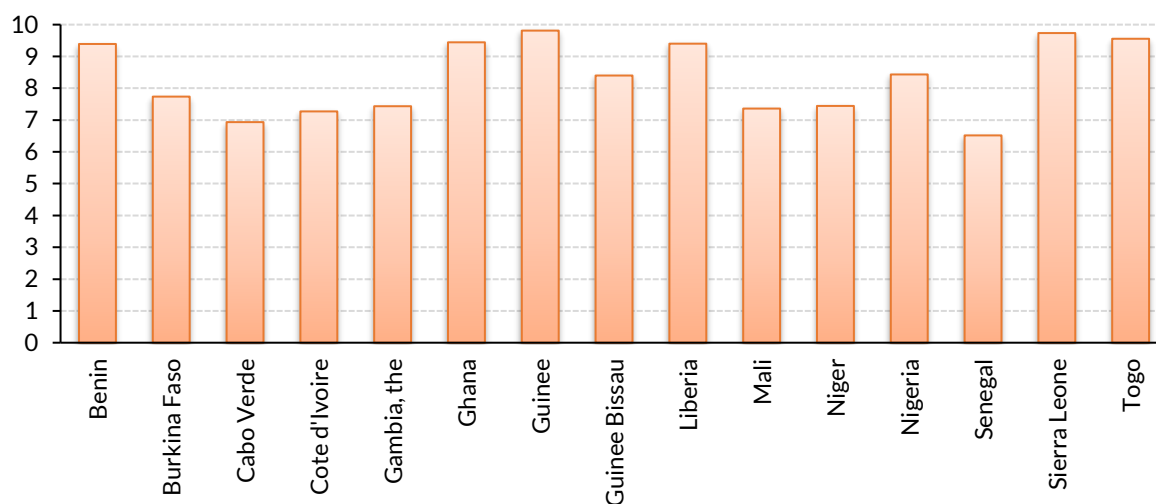
62. The other countries in the region must also step up efforts to increase girls' access to educational services.

63. In terms of employment, the overall situation is not favorable to women in all the countries. According to ILO assessments, Senegal has the least labour market participation of women compared to men, in the region. On the other hand, in 2017, women in Guinea participated more in the labour market.

64. Lastly, discrimination also persists with regard to land ownership. Wide disparities against women can be observed, in access to land in Côte d'Ivoire and Niger, with scores of 1, corresponding to high levels of inequality. The lowest levels of inequality were recorded in Burkina Faso, with a score of 6. A near parity between men and women in access to land was observed in Sierra Leone, which recorded a gender inequality score of 9. More gender-responsive reforms and policies are needed to reverse this situation which seriously limits opportunities for women's empowerment.

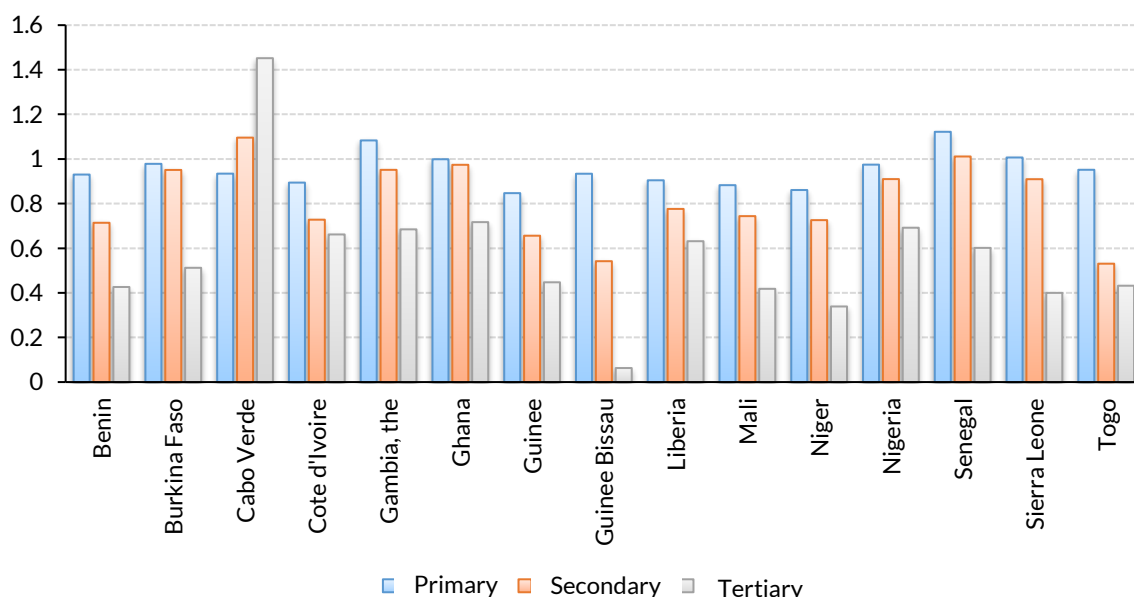
¹⁰ Cabo Verde, Nigeria, Guinea Bissau, and Guinea were not ranked in 2017

Figure 11: Score of women’s participations in the labour market in ECOWAS



Source: ECA based on ILO data (2018)

Figure 12: Gender parity indices of gross enrolment rate in primary, secondary and tertiary education in ECOWAS



Source: ECA, based on World Bank data (World Development indicators 2018) Note: the most recent data was used for each country.

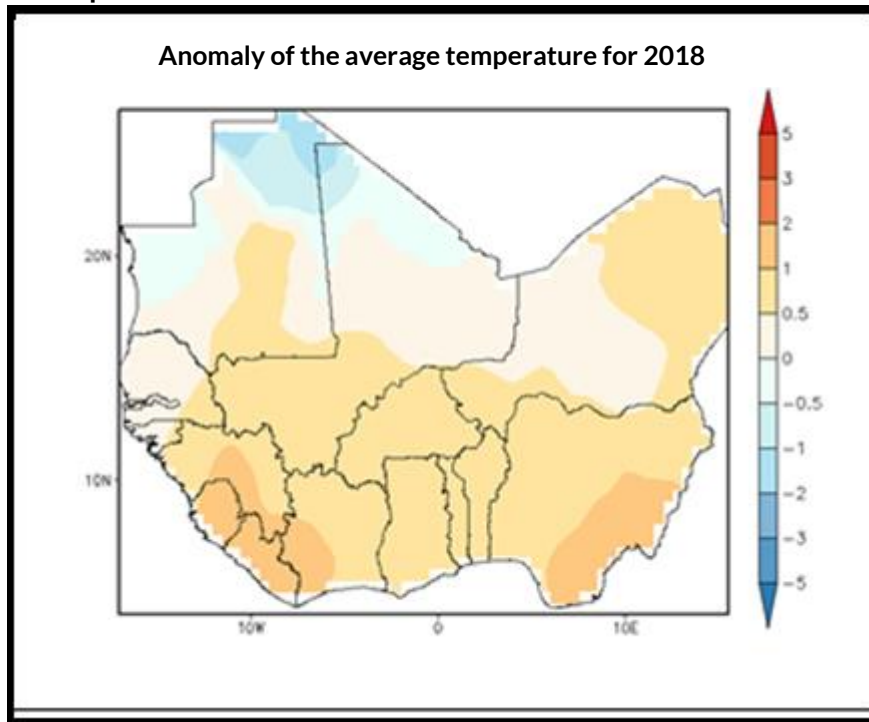
3. Environment: Climate situation and hazards in West Africa

65. The West African region is prone to extreme weather events, particularly droughts and floods, which are often very devastating for most of the region’s socioeconomic systems. With support from the African Center of Meteorological Application for Development (ACMAD), the major meteorological and climate events in West Africa in 2018, and the associated weather hazards are presented in this part.

3.1. Temperature

66. The average annual temperature in 2018 was the seventh warmest in West Africa since 1950. West Africa is warming faster than the world as a whole, recording further warming of 2.27° C (1950-2018) and 3.88° C (1990-2018) per century compared to a global average of 2.2° C every 100 years.

Figure 13: Temperature anomalies over West Africa

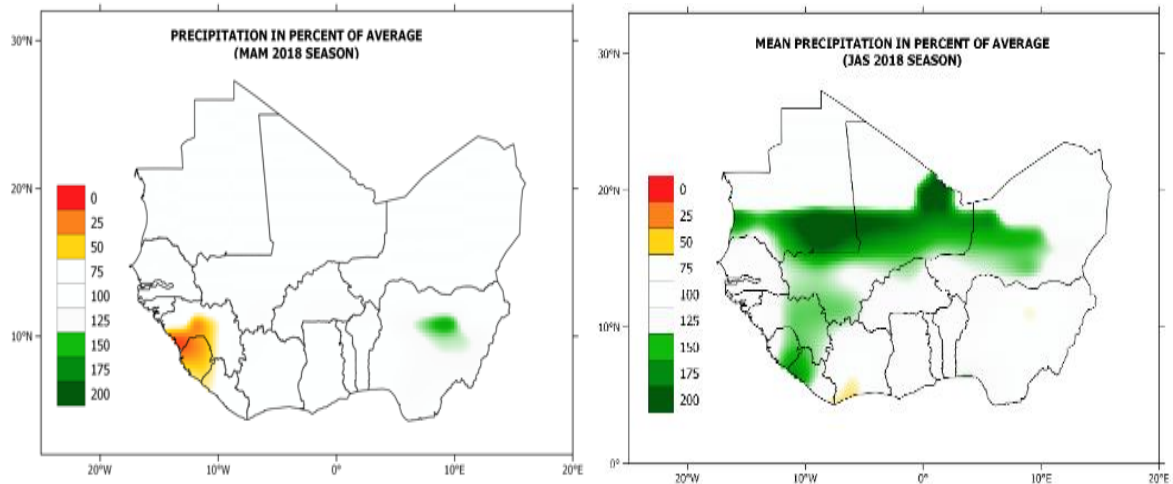


Source: ACMAD, 2019

3.2. Precipitation

67. In March, April and May 2018, drought conditions (rainfall deficit) were recorded in southern Guinea and Sierra Leone, while wetter conditions (excess rainfall) were observed in central Nigeria.
68. In the Sahel region, the July-August-September 2018 season was marked by humid conditions, with Mali and Niger recording the highest amounts of rainfall.

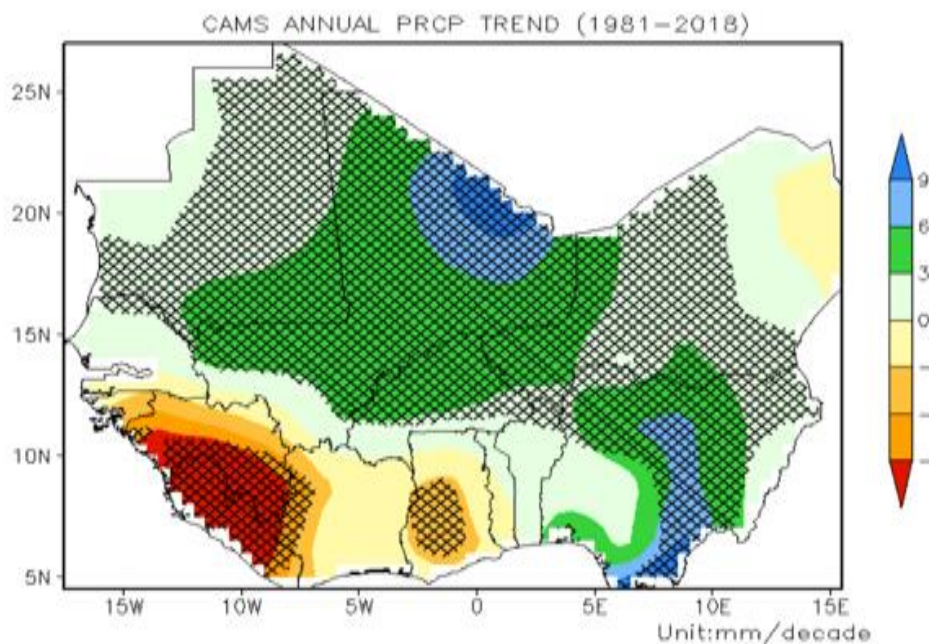
Figure 14: Seasonal trends



Source: ACMAD, 2019

69. In terms of annual average, a significant upward trend in rainfall was recorded in most parts of Mali, northern Burkina Faso, north-western and southern Niger and central Nigeria. On the other hand, a significant downward trend was recorded in Sierra Leone, Liberia, southern Guinea Conakry and parts of Ghana.

Figure 15: Annual precipitation trend

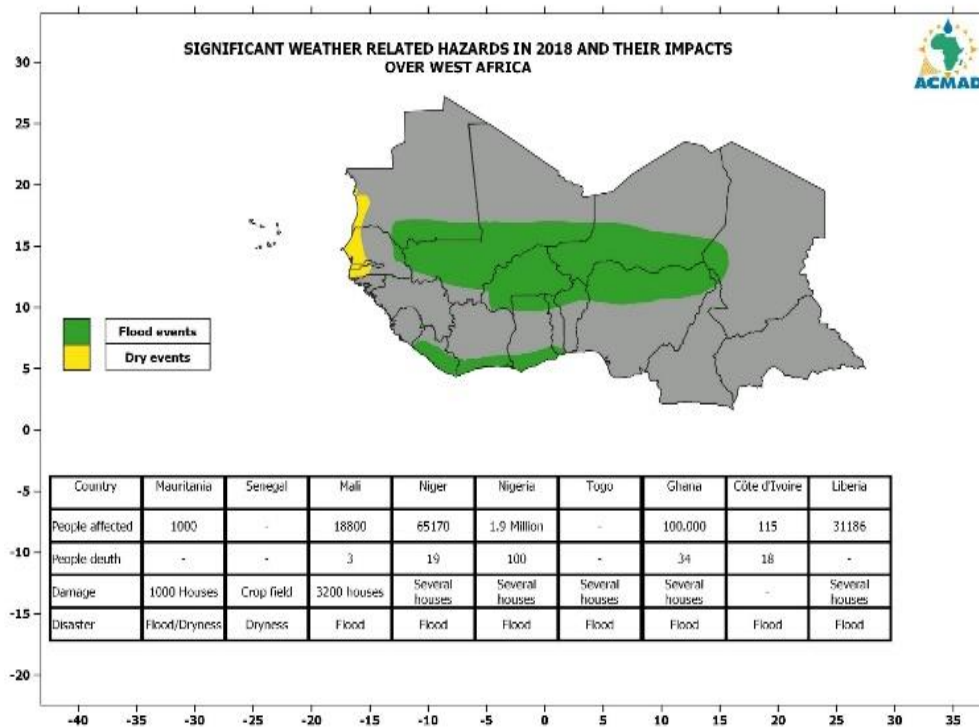


Source: ACMAD, 2019

3.3. Significant weather-related risks in 2018

70. The year 2018 was characterized by above-average seasonal precipitations, which resulted in devastating floods in central Sahel and the Gulf of Guinea in West Africa that affected over 2 million people in Mali, Niger, Nigeria, Ghana, Côte d'Ivoire and Liberia.

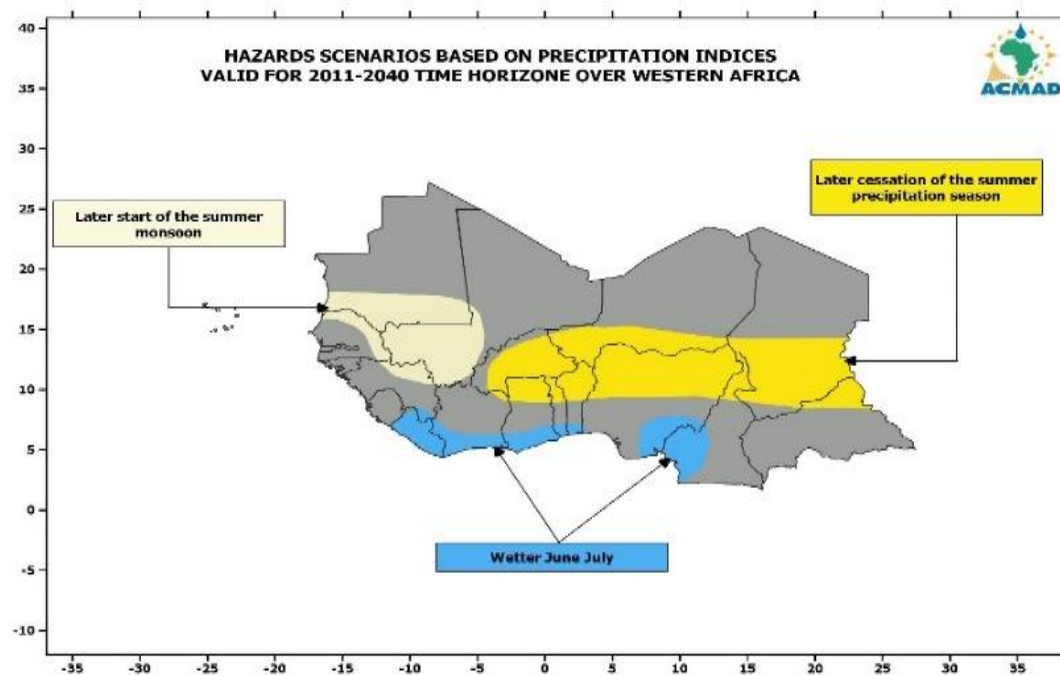
Figure 16: Significant weather-related hazards in 2018 and their impacts on West Africa



Source: ACMAD, 2019

71. These hazards, which occurred in 2018, are part of a global scenario predicted by ACMAD for the 2011-2040 period. They point to an increasingly late onset of rains in a region covering northern and eastern Senegal and southern, central and western Mali. Late cessation of rains is observed in the Sahel region covering Burkina Faso, southern Niger, northern Ghana, Togo, Benin and Nigeria. Lastly, the scenario forecasts increased rains, leading to flooding in the subregion of the Gulf of Guinea (southern Côte d'Ivoire, Liberia, Ghana, Togo, Benin, south-east Nigeria).
72. The occurrence of these hazards is likely to affect the socioeconomic prospects of countries in the sub-region.

Figure 17: Hazard scenarios based on precipitation indices valid for 2011-2018 time horizon over West Africa



Source: ACMAD, 2019

4. Recommendations

73. The review of the macroeconomic and social framework and weather trends in West Africa has helped to identify major challenges for which the following recommendations have been made:

- Strengthen the resilience of the subregional economy to commodity price shocks through the implementation of economic diversification policies;
- Pursue efforts to mobilize tax revenues, rationalize expenditures, consolidate public finances, to reduce budget deficits and better control debt;
- Increase investments in human capital, to reduce exclusion and increase productivity;
- Step up efforts towards gender equality, women's empowerment and education with a view to better controlling demographic dynamics and dividend capture;
- Improve the business environment (reducing the risk of civil and security unrest) to make the region more attractive for long-term investments;
- Intensify weather hazard analyses, to strengthen economic resilience and prevent weather-related disasters in the sub-region;
- Deepen subregional integration, particularly by continuing efforts to meet the convergence criteria in view of the advent of the ECOWAS single currency in 2020.

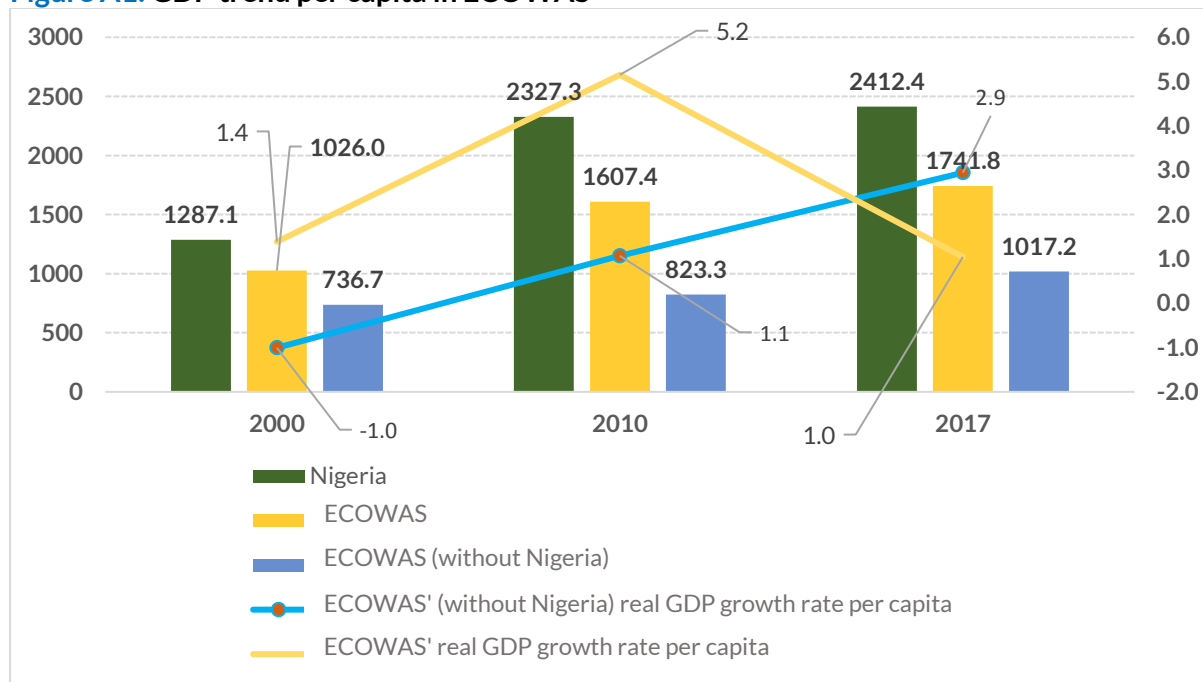
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Annexes

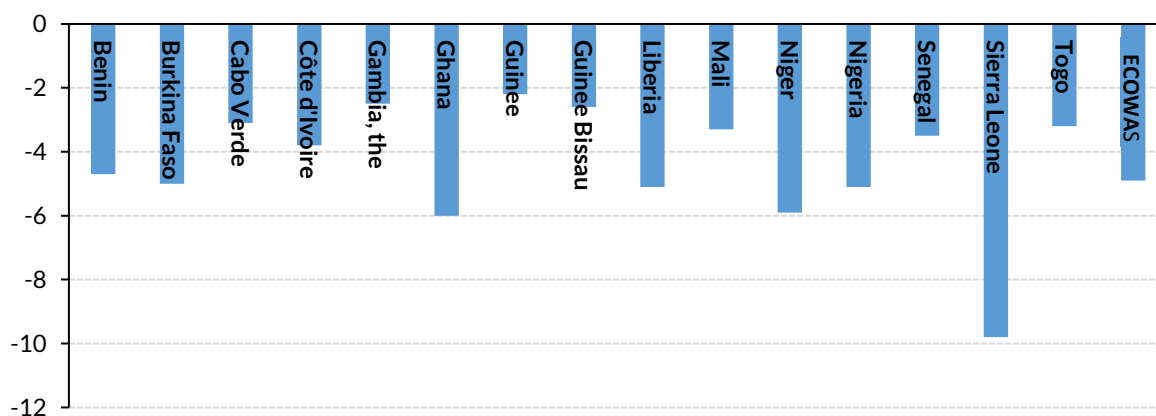
The real GDP per capita of ECOWAS has been in a downward spiral in recent years, mainly as a result of the recession in Nigeria in 2016. The other ECOWAS countries have been less vulnerable to negative commodity shocks beginning from 2011. Their real GDP per capita grew at a higher rate from 2010 to 2017.

Figure A1: GDP trend per capita in ECOWAS



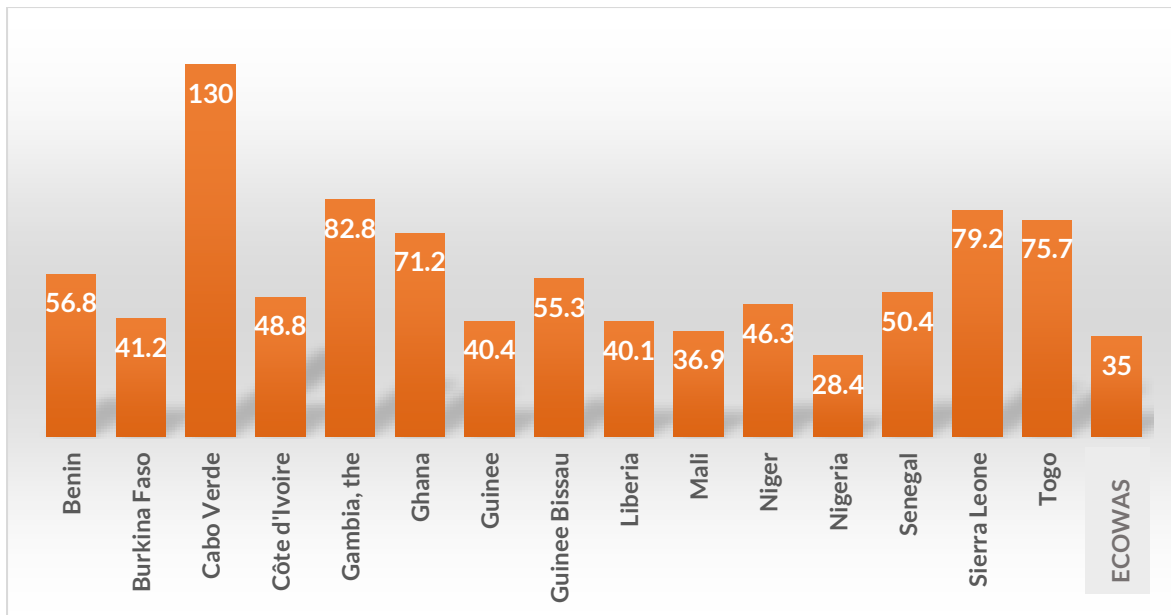
Source: ECA, based on World Bank data (Global Development Indicators 2018)

Figure A2: Overall budget balances of ECOWAS countries in 2018



Source: ECA, based on IMF data (2018)

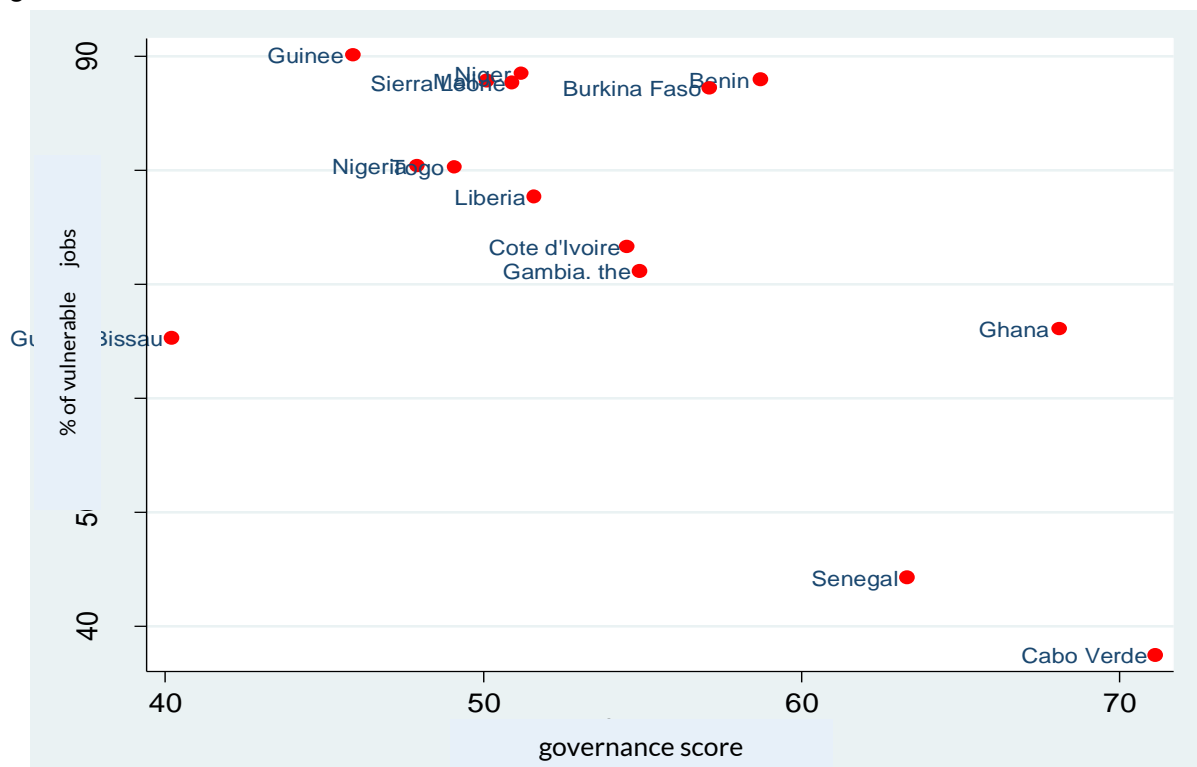
Figure A3: Debt ratios of ECOWAS countries in 2018 (% of GDP)



Source: ECA, based on IMF data (2018)

Figure A4: Correlation between the proportion of vulnerable employment and governance scores in ECOWAS countries

The proportion of vulnerable jobs in ECOWAS countries appears to be negatively correlated with the governance scores of countries.



Source: ECA, based on UNDP data (2017) and Mo Ibrahim Index of Governance (2018)

Table A1: Mo Ibrahim Index of Governance 2018: Overall score, rank and progress

Cabo Verde recorded the best governance performance in the region with a score of 71.1, ranking third in Africa. Togo, Nigeria, Guinea and Guinea Bissau recorded the lowest performances with overall scores below average. Côte d'Ivoire, 22nd in Africa, is the country that achieved the greatest progress in 2018, improving its score by 12.7 points

Country	Overall score/100	Rank in Africa/54	Progress
Cabo Verde	71.1	3	-0.8
Ghana	68.1	6	+0.9
Senegal	63.3	10	+5.9
Benin	58.7	13	-0.1
Burkina Faso	57.1	16	+4.8
Gambia, the	54.9	21	+3.0
Côte d'Ivoire	54.5	22	+12.7
Liberia	51.6	23	+4.8
Niger	51.2	24	+5.6
Sierra Leone	50.9	26	+0.5
Mali	50.1	28	-4.0
Togo	49.1	30	+5.2
Nigeria	47.9	33	+2.8
Guinea	45.9	37	+61
Guinea Bissau	40.2	42	+0.9

Source: Mo Ibrahim 2018

Table A2: Overall competitive index of ECOWAS economies in 2018

Country	Overall score/100	Rank /140
Ghana	51	106
Cabo Verde	50	111
Senegal	49	113
Côte d'Ivoire	48	114
Nigeria	48	115
Gambia, the	45	119
Benin	44	123
Burkina Faso	44	124
Mali	44	125
Guinea	43	126
Liberia	41	132
Sierra Leone	39	134

Source: The Global Competitiveness report 2018

Note: No data for Niger, Guinea Bissau, and Togo

Table A3: Gender Inequality Index (GII) 2017

Country	Value	Rank/160
Senegal	0.515	124
Ghana	0.538	131
Togo	0.567	140
Burkina Faso	0.61	145
Benin	0.611	146
Gambia, the	0.623	149
Sierra Leone	0.645	150
Niger	0.649	151
Liberia	0.656	154
Côte d'Ivoire	0.663	155
Mali	0.678	157

Source: UNDP (2018)¹¹

Note: No data for Cabo Verde, Guinea, Guinea Bissau, and Nigeria

¹¹<http://hdr.undp.org/en/composite/GII>