ECOWAS

ECOWAS: Current Path

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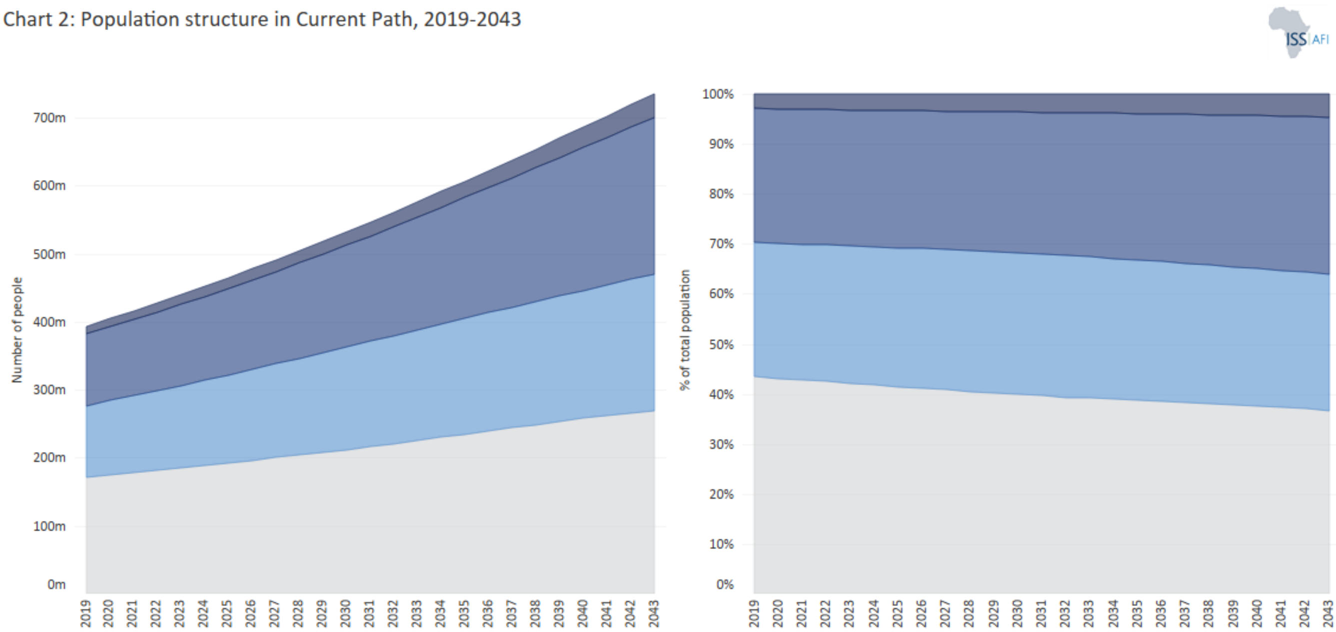
Population

Chart 2: Population structure in Current Path, 2019-2043



Source: IFs 8.14 initialising from UNPD population prospects estimate and WDI population data

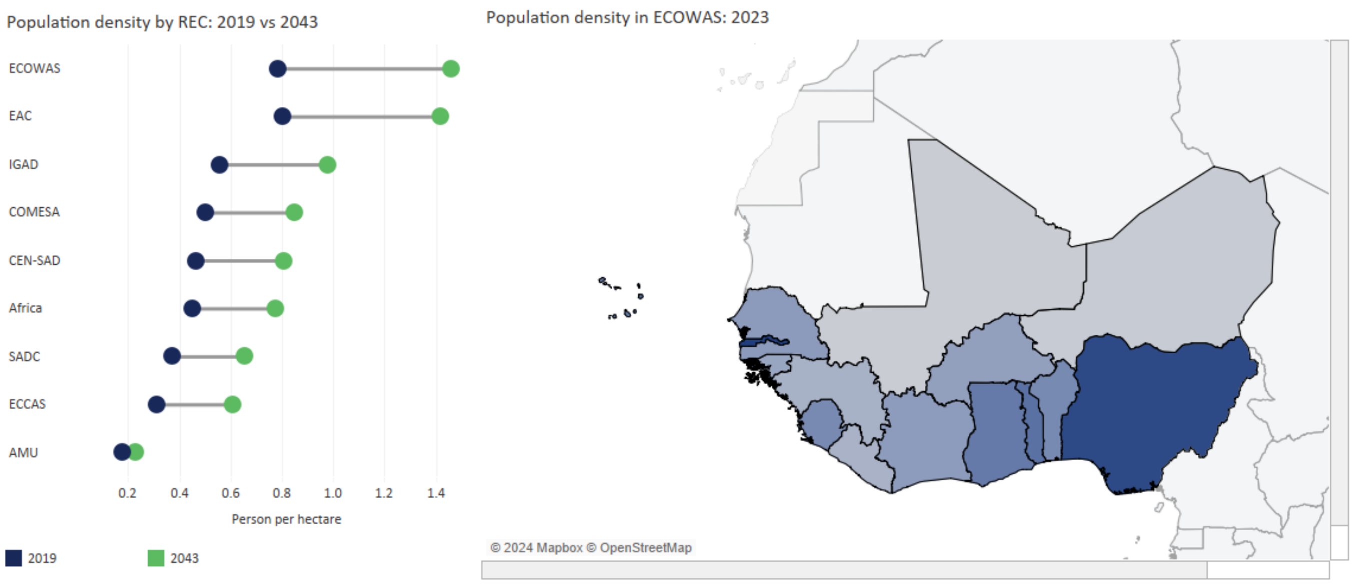
Chart 2 presents the population structure to 2043 in the Current Path .

The total population of ECOWAS increased from 180.8 million in 1990 to 393.4 million in 2019, making it the third most populous REC on the continent, after the Community of Sahel-Saharan States (CEN-SAD) and the Common Market for Eastern and Southern Africa (COMESA). This represents an increase of 117.6%. The population of Nigeria alone (about 203.3 million in 2019) makes up more than half of the total population of ECOWAS. Nigeria is followed by Ghana and Côte d'Ivoire, with populations of about 31.5 million and 26.2 million people, respectively. The least populous member countries are Cabo Verde (577 000), Guinea-Bissau (1.9 million) and Gambia (2.5 million). By 2043, the total population of ECOWAS will be 765.1 million, still lower than those of CEN-SAD and COMESA.

In 2019, the proportion of the population younger than 15 and between 15 and 65 years old was 43.4% and 54.1%, respectively. This is only a slight shift from 1990 figures (45.4% and 51.4%, respectively) which suggests that the youthful population structure has not changed much. The population growth rate of 2.8% is the third highest, after the Economic Community of Central African States (ECCAS) and the East African Community (EAC). The overall median age for ECOWAS was 18.0 years in 2019, lower than the EAC and ECCAS. The median age in countries ranges from 15.4 years (Niger) to 26.6 years (Cabo Verde). Indeed, only Ghana and Cabo Verde have a median age above 20 years. By 2043, the median age of the region will be 22.0 years, which will still be higher than that for ECCAS and EAC.

ECOWAS has the fourth highest youth bulge among the RECs in Africa, after the Intergovernmental Authority on Development (IGAD), the EAC and ECCAS. It was about 47.5% in 2019 and will decline to 42.3 in 2043 which is still high. Within ECOWAS, countries with a higher youth bulge include Niger (50.7%), Guinea (50.4%), Mali (50.2%) and Burkina Faso (49.1%). Cabo Verde, Ghana, Togo and Liberia have lower youth bulges (40.6%, 43.1%, 45.6% and 45.9%, respectively). While a large youth bulge can usher in youth activism and positive political changes in the region, it can also increase the likelihood of criminal violence, conflicts and instability, mainly when the needs of the youth, such as employment, cannot be met. In 2020, the unemployment rate among young people aged between 15 and 24 in the region was at 11.9% - a number that would be much higher if 'employment' in the informal sector was excluded. It is not surprising that the countries with the highest youth bulge in the region have all witnessed military coups in the last three years. The Current Path forecast shows that by 2043, the proportion of people younger than 15 will decline to 36.4%, while the proportion of people between 15 and 65 years will rise to 58.9% as fertility rates slowly decline.

Chart 3: Population density per hectare: 2023 vs 2043



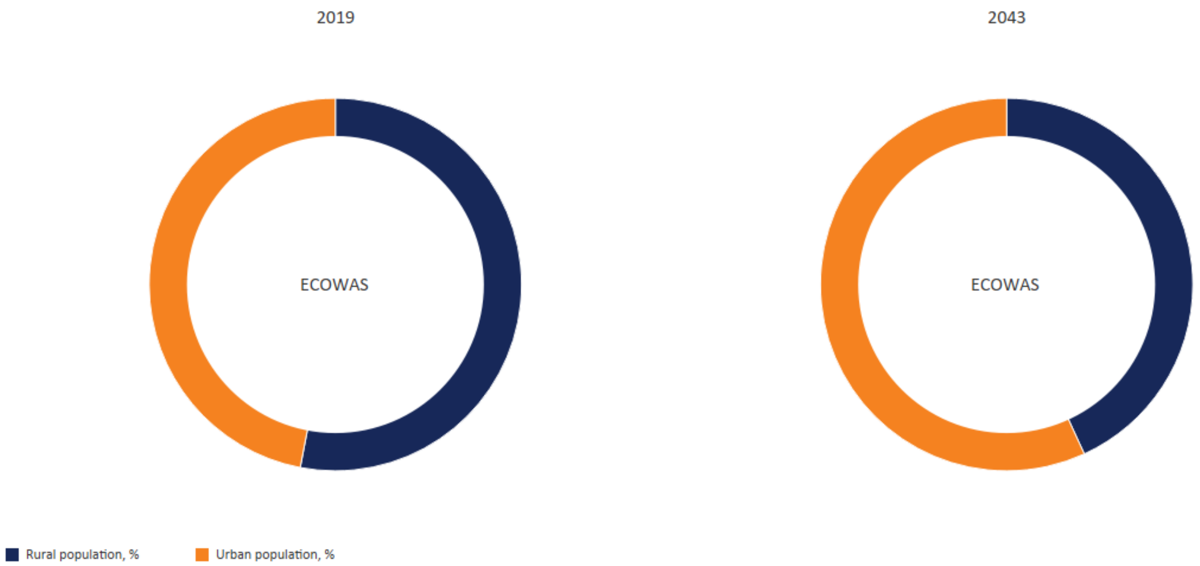
Source: IFs 8.14 initialising from UNPD World Population Prospects

Chart 3 presents a population density map.

The population of ECOWAS is settled on a total land area of 6.14 million km^2. The population density of the subregion was 0.78 people per hectare in 2019, which is the highest among the RECs and greater than the average for Africa (0.45 people per hectare). The Gambia, Nigeria and Togo have the greatest population densities, at 2.48, 2.23 and 1.52 people per hectare, respectively. Countries with the lowest population densities in the region are Liberia (0.52 people per hectare), Niger (0.19 people per hectare) and Mali (0.17 people per hectare).

The population of West Africa is unequally distributed across the region. Settlement patterns in ECOWAS are mostly dependent on climatic factors, soil fertility and economic opportunities. Thus, the population is densely concentrated in arable regions such as the Peanut Basin of western Senegal, the Niger–Nigeria border region, central Burkina Faso and south-western Chad owing to the favourable climatic conditions and high soil fertility. The riverine plains of the Senegal and Niger rivers also have high settlements as a result of the availability of perennial water for irrigation farming. In addition, there are dense coastal settlements because of the economic opportunities in these areas. In contrast, the northern part of ECOWAS is sparsely populated owing to the arid nature of the area.

Chart 4: Urban and rural population in Current Path, 2019 vs 2043



Source: IFs 8.14 initialising from UN world urbanization prospects data

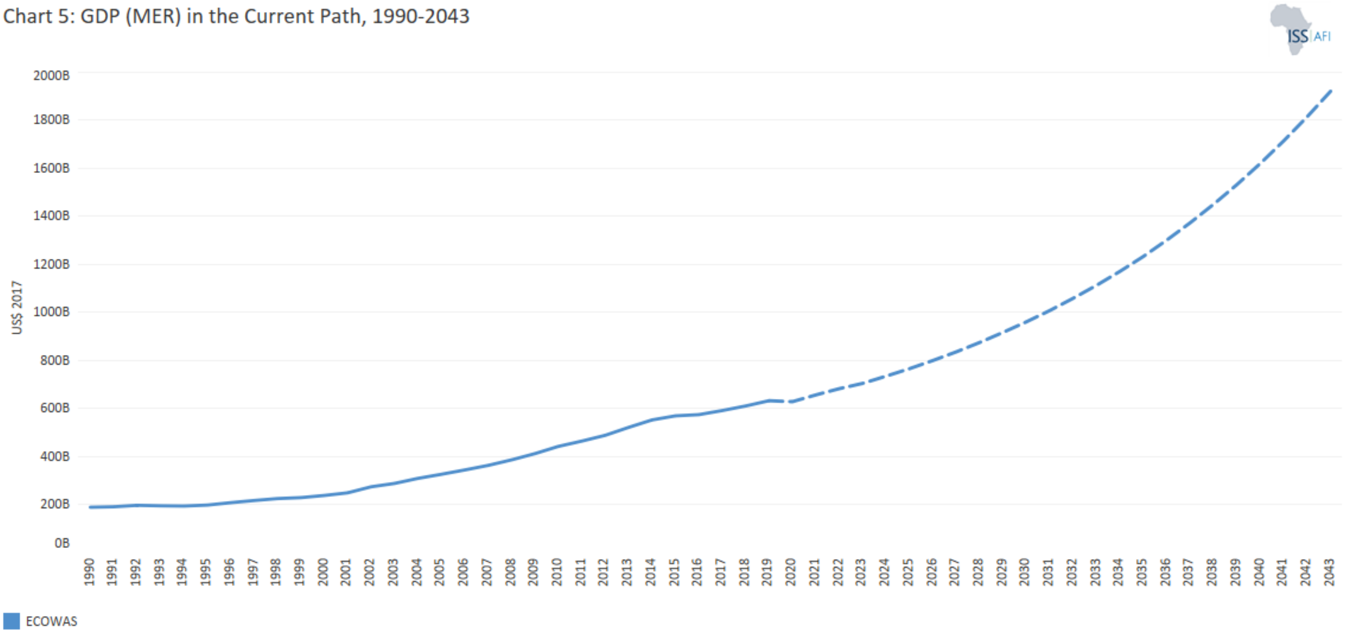
Chart 4 compares urban and rural populations in the Current Path and the Demographics and Health scenario.

The majority of the ECOWAS population lives in rural areas, although the rate differs between member states. As of 2019, 53.0% of the total population resided in rural areas – a decline from about 70% in 1990. This is lower than the average of 57% for Africa and the other RECs, except for the Arab Maghreb Union (AMU). ECOWAS has a faster urbanisation rate than the continent's other RECs or Africa as a whole. Because of rapid urbanisation, there is a growing trend of slums in urban centres partly due to poor urban planning. According to the UN Economic Commission for Africa (UNECA), 47% of urban populations in the region live in slums with living conditions worse than in rural areas.

Generally, urbanisation ought to increase economic growth but this has not been the case in the region. Growth in urban centres has not been accompanied by proportional growth in GDP. Six member countries had less than half of their populations living in rural areas, ranging from Nigeria and Côte d'Ivoire (both at 48.8%), Liberia, Ghana, The Gambia and Cabo Verde at 33.8%. However, Niger (83.5%), Burkina Faso (70.0%) and Guinea (63.5%) all had a high proportion of their populations living in rural areas in 2019. On the Current Path, by 2043, 57.6% of the population of ECOWAS will reside in urban centres, above the average for Africa and other RECs (except for the AMU). This high urbanisation rate will come with associated unintended consequences, such as pressure on urban amenities.

Economy

Chart 5: GDP (MER) in the Current Path, 1990-2043



Source: IFs 8.14 initialising from IMF data

Chart 5 presents the size of ECOWAS' economy from 1990 and includes a forecast to 2043 including the associated growth rate.

The West African economy highly depends on agriculture and huge mineral deposits. Most countries in the region rely on primary commodity exports with little or no added value. For instance, Nigeria's economy largely depends on exporting its oil, while Ghana and Côte d'Ivoire rely significantly on cocoa, gold and other mineral exports. As a result, these economies are susceptible to international commodity price fluctuations and shocks.

In 2019, ECOWAS had the fourth largest economy among Africa's RECs with a GDP of US$633.1 billion, representing about 25.5% of the continent's total economy. This constituted an increase of 233.2% from 1990 when GDP was at US$190.0 billion. This is dominated by Nigeria (GDP of US$391.4 billion in 2019 constituting 61.8% of the total) and the smallest economies are Guinea-Bissau, The Gambia and Cabo Verde, each representing less than 0.5% of the Community total.

The ECOWAS economy grew at 3.6% in 2019. However, the COVID-19 pandemic greatly affected the region, hampering growth. It was projected to grow at 4% in 2020, yet contracted by almost 1%. The pandemic caused contractions mainly in six countries (Mali, Nigeria, Sierra Leone, Guinea Bissau, Liberia and Cabo Verde) in 2020. According to an Oxfam report, the West African region lost about US$48.7 billion in GDP and working hours, which is equivalent to 7 million jobs, in 2020.

Inflation in the region is relatively low compared to other parts of the continent, primarily due to the pegged exchange regime of the WAEMU. Notwithstanding, the annual inflation rate in the region rose from 9.7% to 17% (average from 2014-2020), mainly because of higher inflation rates in non-WAEMU countries (Ghana, Sierra Leone and Nigeria). This high inflation rate was primarily caused by increases in food and energy prices due to Russia's invasion of Ukraine. This was accentuated by the restrictive monetary policies implemented in advanced economies resulting in tight global financial market conditions.

The region further suffers from high public debt levels where the average public debt-to-GDP ratio increased from 37.1%

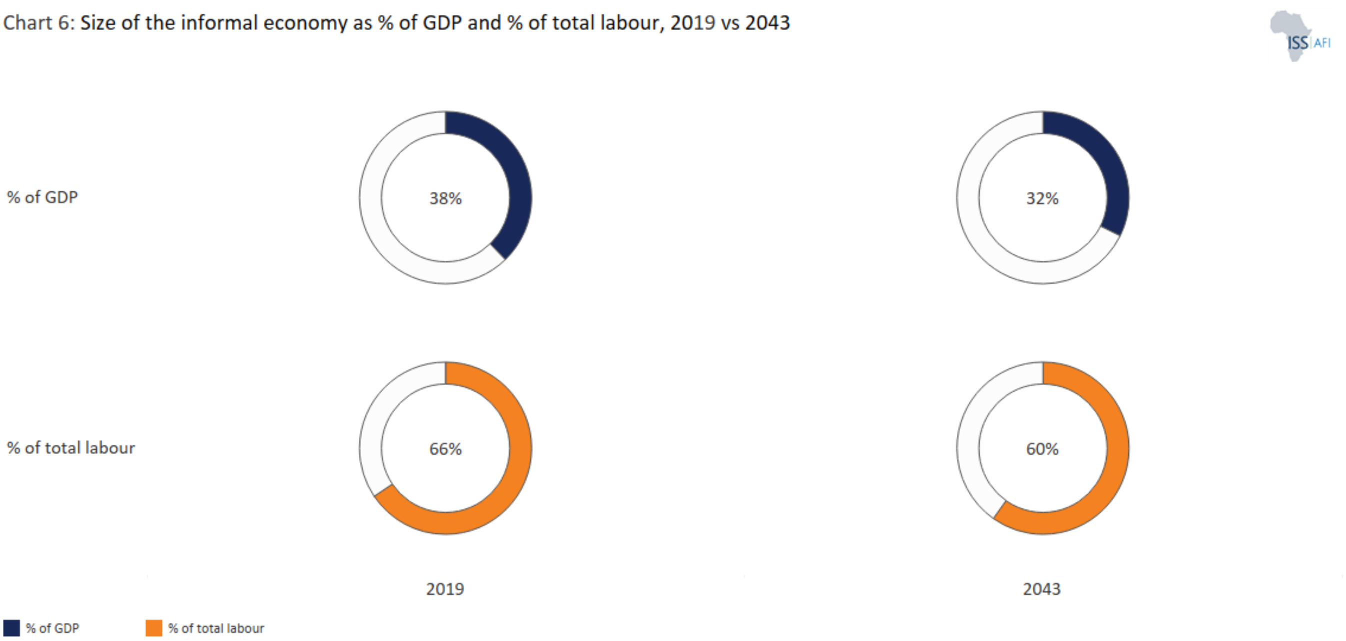
in 2019 to 49.3% in 2022. This increase is driven by the widening fiscal deficit, weak domestic currencies and low economic growth. The ratio is particularly high in non-oil exporting countries, with the debt-to-GDP ratio reaching 73% in 2022. For instance, in Cabo Verde it reached 137.1% in 2022. On the other hand, it was low (37% in 2022) for the oil-exporting countries due to the surge in oil prices thereby increasing revenues.

A large part of external debt stems from growing appetite for Eurobond in ECOWAS. For instance, Ghana, Nigeria, Côte d'Ivoire, Senegal and Benin have all issued Eurobonds over the past decade. As a result, all countries in the region are at risk of debt distress. In 2022, Ghana, The Gambia, Sierra Leone, and Guinea Bissau were classified as high risk, with the remaining countries at moderate risk. In fact, Ghana defaulted on its debt in December 2022 and embarked on debt restructuring. All these challenges are hampering economic recovery and growth in the region. Moreover, economic sanctions imposed by ECOWAS on Burkina Faso, Niger, Guinea and Mali that were involved in military takeovers also affected their economic activities.

Nonetheless, the region has an optimistic outlook with economic growth to rebound to 4.2% in 2024. This is partly due to most countries signing onto an IMF programme. Currently, 9 countries (Senegal, Benin, Niger, Liberia, Sierra Leone, the Gambia, Ghana, Côte d'Ivoire and Cabo Verde) are on IMF-supported programmes.

Long term growth prospects are more positive reflecting economic potential. The GDP of ECOWAS will have more than tripled by 2043, reaching about US$2.0 trillion, equivalent to an increase of 214.5% over that period. This will increase the share of ECOWAS in Africa's economy to about 29.2% by 2043. The GDP increase will largely be driven by the expected growth in Nigeria, although its share will decline to 53.6% of the total ECOWAS economy by then.

Chart 6: Size of the informal economy as % of GDP and % of total labour, 2019 vs 2043



Source: IFs 8.14 initialising from Elgin and Oztunali (2008), and Schneider and Enste (2012) data

Chart 6 presents the size of the informal economy as a per cent of GDP and in absolute terms, as well as the per cent of total non-agriculture labour involved in the informal economy.

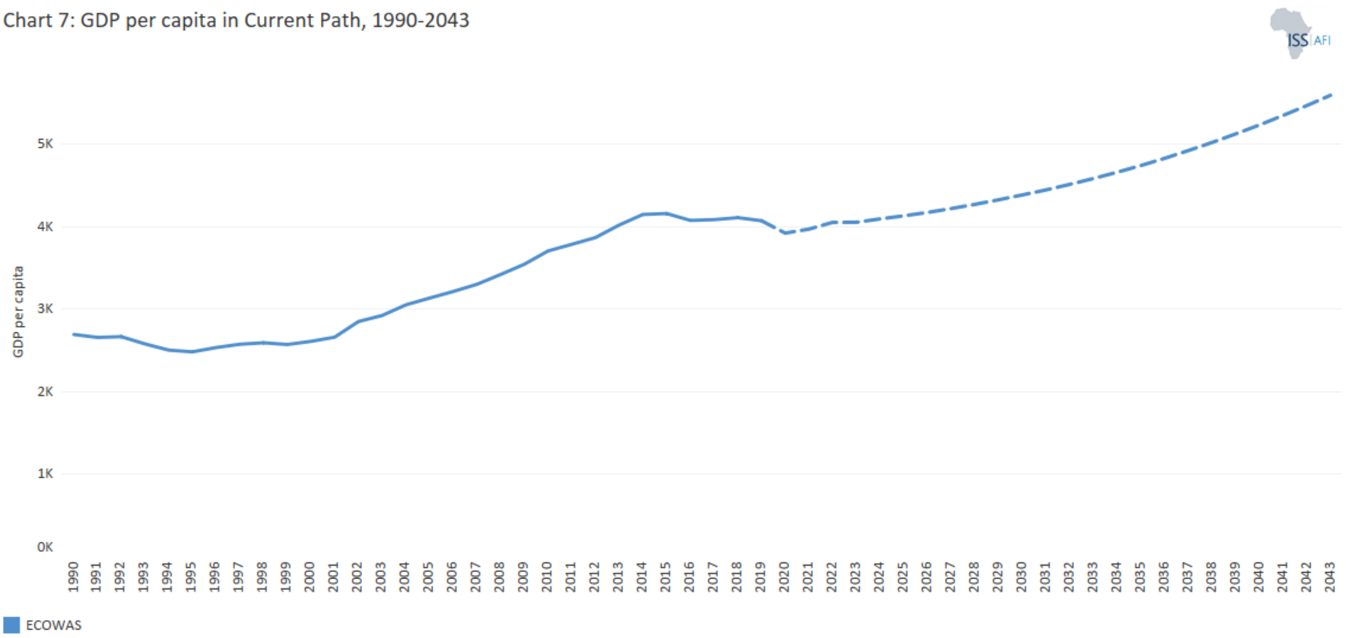
ECOWAS has a large informal economy. The World Economic Forum estimated that the informal sector in ECOWAS constitutes about 80% of total employment and 90% of all new jobs. About 60% of self-employment is also in the informal sector. This sector consists of small enterprises and large firms with organised networks. The majority of young people work in the informal sector with poor employment conditions and little social security. The unfavourable business climate in the region and the inability to enforce regulation hinder the activities and formalisation of the sector.

In 2019, the informal sector represented 37.8% of the region's GDP, equivalent to US$279.6 billion. As a percentage of GDP, the informal sector was larger than the average for Africa (26.1%) and the largest among the RECs. The size of the informal sector varies among member states, ranging from as high as 42.1% of GDP in Benin to 29.4% in Ghana. A major implication of the large informal economy is the low tax-to-GDP ratio. Based on its unregulated nature, the government is unable to derive the needed tax revenue from the sector. For instance, Cabo Verde which has the lowest informal sector in the region also had the highest tax-to-GDP ratio of 24% while Nigeria with one the biggest informal sectors had a tax-to-GDP ratio of 2.8% in 2022.

On the Current Path, the size of the informal sector will decline to 31.5% of GDP, seven percentage points higher than the average for Africa and the highest amongst all RECs. Benin, Nigeria, Côte d'Ivoire, Liberia and Guinea Bissau will have an informal sector representing more than 30% of their GDP in 2043. Other countries' informal sectors are expected to be smaller (e.g. Cabo Verde's will account for 17.6% of GDP by 2043).

With regard to the labour force, the proportion of people employed in the informal sector in ECOWAS averaged 65.6%, which is lower only compared to ECCAS (68.6%) and the EAC (72.3%). Only Cabo Verde (35.7%) and Ghana (49.4%) have less than 50% of its labour force employed in the informal sector, while the proportion is very high in countries such as Mali (81.8%) and Benin (74.9%). Although this proportion across ECOWAS will decline to 59.1% by 2043 on the Current Path, it will still be the region with the highest informal employment in Africa. It will range from 71.5% in Mali to 28.7% in Cabo Verde and will hinder government revenue mobilisation efforts as activities in the sector are largely untaxed. Also, having more people work in the informal sector instead of the formal sector can increase poverty as there is evidence to show that informal workers are often exploited and earn lower wages with little or no social protection.

Chart 7: GDP per capita in Current Path, 1990-2043



Source: IFs 8.14 initialising from IMF data

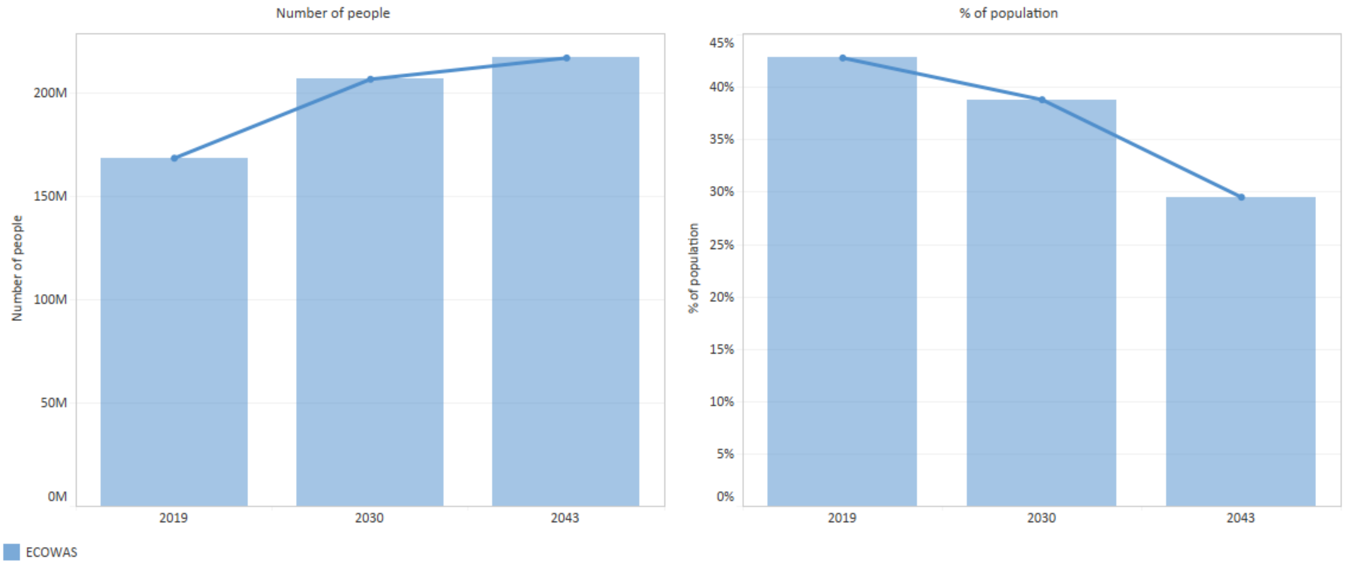
Chart 7 presents average GDP per capita from 1990 and includes the Current Path forecast to 2043.

The average GDP per capita in ECOWAS increased from US$2 693 in 1990 to US$4 145 in 2019, representing an increase of

53.9% over that period. In 2019, the region's GDP per capita constituted 83.2% of Africa's average of US$5 289. It was the fourth highest among the RECs after AMU, CEN-SAD, COMESA and the Southern African Development Community (SADC). GDP per capita in member countries varied from US$7 793 (Cabo Verde) US$1 656 (Sierra Leone).

The higher GDP per capita in Nigeria can be attributed to the country's large oil reserves. In Ghana and Côte d'Ivoire it is a result of natural resources such as cocoa, gold and, in recent years, notable oil reserves. In Cabo Verde, a buoyant tourism sector coupled with a relatively small population size explains the higher GDP per capita. In contrast, Niger, Liberia, and Sierra Leone are poorer countries, in part because of civil wars and instability. The average GDP per capita of ECOWAS will be US$5 754 by 2043. This will still be below Africa's average of US$6 450 and the averages for AMU, CEN-SAD, COMESA and SADC.

Chart 8: Extreme poverty in Current Path, 2019-2043



Source: IFs 8.14 initialising from UNPD population prospects estimate, WDI and PovcalNet data

Chart 8 presents the number of people living in extreme poverty, also expressed as a per cent of the population.

In 2022, the World Bank updated its poverty lines to 2017 constant dollar values as follows:

- The previous US$1.90 extreme poverty line is now set at US$2.15, also for use with low-income countries.
- US$3.65 in 2017 values (previously US$3.20 in 2011 values).
- US$6.85 in 2017 values. (previously US$5.50 in 2011 values)
- The Bank has not yet announced the new poverty line in 2017 US$ prices for high-income countries.

Monetary poverty only tells part of the story, however. In addition, the global Multidimensional Poverty Index (MPI) measures acute multidimensional poverty by measuring each person's overlapping deprivations across 10 indicators in three equally weighted dimensions: health, education and standard of living. The MPI complements the international $2.15 a day poverty rate by identifying who is multidimensionally poor and also shows the composition of multidimensional poverty. The headcount or incidence of multidimensional poverty is often several percentage points higher than that of monetary poverty. This implies that individuals living above the monetary poverty line may still suffer deprivations in health, education and/or standard of living.[1]

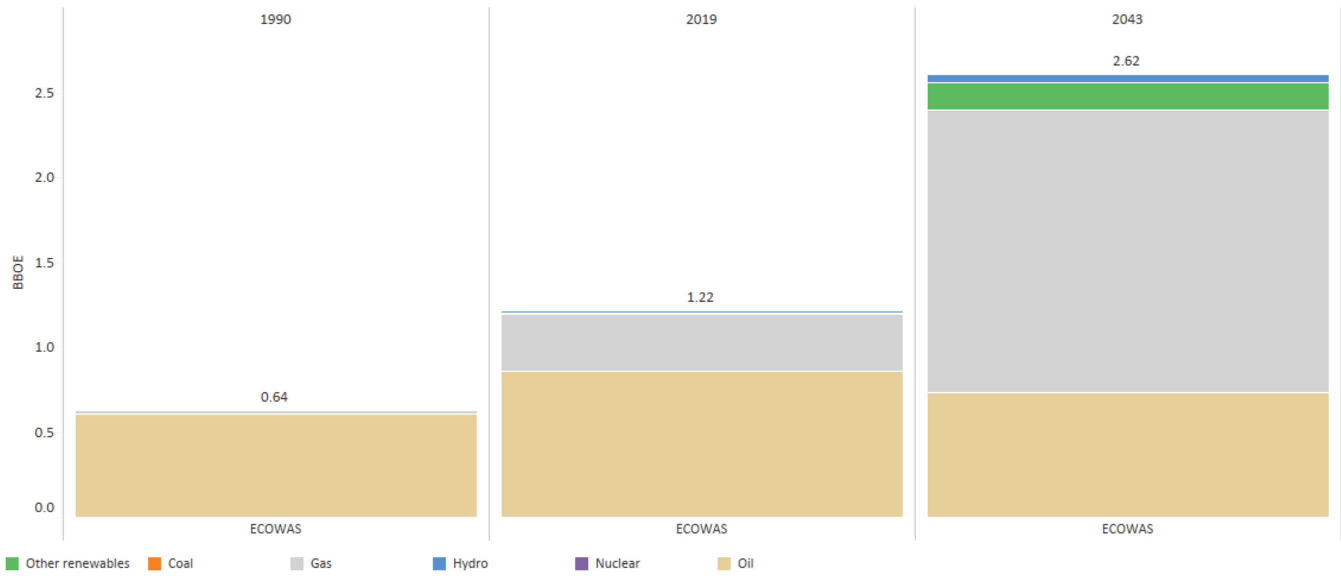
The ECOWAS region has high levels of poverty among its population. According to the 2016 Multidimensional Poverty Assessment, about 65.3% of people considered multidimensionally poor in sub-Saharan Africa are living in West Africa. This is mainly driven by the high poverty numbers in Nigeria which also has the continent's largest population. Similarly, based on the 2021-2022 Human Development Index, only Cabo Verde and Ghana are ranked in the medium human development countries, while the remaining countries were ranked below the averages for sub-Saharan Africa.

In 2019, the number of people who lived below the poverty line of US$2.15 was about 106.8 million, constituting 27.2% of the total population. This makes ECOWAS the REC with the third lowest poverty rate after AMU (0.7%) and CEN-SAD (21.2%), and pitches it below Africa's average of 31.2%. Poverty levels differ substantially among member countries. Niger has the largest extreme poverty rate in the region with half of its citizens living below the US$ 2.15 poverty line. This is followed by countries such as Nigeria, Burkina Faso, Liberia, Togo and Sierra Leone with at least a quarter of citizens living in extreme poverty. Cabo Verde has the lowest poverty rate in the region (3.4%), followed by Senegal and Côte d'Ivoire, with poverty rates of 9.2% and 11.1%, respectively.

The absolute number of poor people in the region will increase to 117.1 million by 2043 although this translates into a decrease in the proportion of people living below US$2.15 a day to 16%, almost at par with Africa's average. By 2043, extreme poverty among member countries will range from 30.6% in Liberia to 1.2% in Senegal and Côte d'Ivoire. Cabo Verde, Guinea, Benin, Mali and Ghana will all have rates below 10% by 2043. By this measure, ECOWAS will improve its position relative to other economic communities.

Energy

Chart 9: Energy production by type in Current Path, 1990-2043



Source: IFs 8.14 initialising from World Energy Outlook data

Chart 9 compares energy production in the Current Path forecast in six types, namely oil, gas, coal, hydro, nuclear and other renewables. The data is converted into million or billion barrels of oil equivalent (BOE) to allow for comparisons between different sources. Note that energy production could be for domestic use or export.

In 2019, the total energy production in ECOWAS was equivalent to 1.1 billion BOE. Total energy demand was 410 million BOE meaning excess energy of 690 million BOE was available, translating into a net export of 3% of GDP. In the Current Path forecast, ECOWAS becomes a net energy importer from 2041. Total energy demand will outgrow production so that by 2043 it will be equivalent to 1.1 billion BOE.

Since 1990, oil has been the dominant type of energy produced in the region. In that year, total production was 630 million BOE, constituting 95% of total energy production. By 2019 it was 758 million BOE in 2019, representing 72% of total energy production.

Energy production in the region is enabled by the large oil reserves in Nigeria, which, in 2019, accounted for about 85% of the total. The remaining production came from Ghana, Côte d'Ivoire and Niger, constituting 8.8%, 2.2% and 1.3%, respectively. The region exports significant amounts of unrefined oil and gas and then imports the refined products. However, the establishment of the Dangote Petroleum Refinery, which is Africa's biggest oil refinery, will refine up to 650,000 barrels per day. This will drastically reduce the imports of refined products. Rather, it is expected to meet Nigeria's demand for refined products and allow export of the rest.

The production of gas has increased significantly between 1990 and 2019, going up from 22 million BOE (equivalent to 3.5% of total energy production) to 280 million BOE (26.7% of total energy production). Nigeria contributes about 83.7% of total gas production. Other significant sources include Côte d'Ivoire (5.6%), Ghana (2.9%), Guinea (2.1%) and Burkina Faso (1.3%). The production of hydro and coal will constitute just 1.1% and 0.6%, respectively. Ghana, Nigeria and Côte d'Ivoire are significant sources of hydro in the region, constituting 29.4%, 28.3% and 19.6%, respectively of total production in the region.

By 2043, gas will be the dominant energy source in the region, with an output of 1.7 billion BOE (63.3% of total energy production). This will be complemented by oil production, reaching 749 million BOE and constituting 28% of total energy production. Hydro is expected to contribute 2% of total energy production with most of the existing hydropower projects based in Ghana (Akosombo Dam) and Nigeria (Kainji, Jebba and Shiroro dams). Other renewables will contribute the remaining 6.1%.

ECOWAS has been embarking on an energy transition as part of its commitment to reduce dependency on fossil fuels. The increase in the share of renewables reflects this effort. With huge solar (1 956 GW) and wind (106 GW) energy potentials, the majority of renewable energy will be derived from these two sources. Senegal has already constructed a 158 megawatt wind farm while Niger is constructing a 250MW wind farm. The World Bank supported Regional Emergency Solar Power Intervention Project (RESPITE) for Liberia, Sierra Leone and Togo will substantially increase solar energy production in the region. Other innovative projects include the wave energy project in Ghana, wave-powered desalination in Cabo Verde, thorium exploration in Nigeria, biogas programmes in Senegal and biofuel plant construction in Senegal and Mauritania.

By 2043, Nigeria's share of ECOWAS's total oil production will slightly increase to 85.4%, while Ghana's will decline to 3.5%. Similarly, Nigeria's share in gas production will increase to 92.5%, while that of Côte d'Ivoire and Guinea will decline to 1.6% and 1.9%, respectively. This means that even by 2043, Nigeria will rely heavily on its oil and gas sectors for energy production and government revenues, ultimately increasing its share of fossil fuel production. With its new Petroleum Industry Act (PIA, 2021), the country is embarking on 20 new gas projects to address energy needs at both national and regional levels and increase its gas reserves from 200 trillion cubic feet (tcf) to 600 tcf. It has already signed an MoU with Equatorial Guinea to supply natural gas to the Punta Europa gas processing facility.

Ghana and Nigeria will be the main producers of energy from other renewables, contributing 72.8% of the total by 2043 (Ghana: 53.4%, Nigeria: 19.4%). In the case of Ghana, various efforts are being made to transition to renewable energy. It currently boasts several renewable energy sources, including the Volta River Authority at Kaleo/Lawra and Navrongo, Bui Solar Farm, BxC Solar, and Meinergy, among others. With the launch of its Energy Transition and Investment Plan, which aims to achieve net zero energy-related carbon emissions by 2060 through low-carbon solutions, Ghana is set to embark on more renewable energy projects.

Regional Development Plan

Chart 10: Regional Development Plan of ECOWAS

ECOWAS COMMISSION
COMMISSION DE LA CEDEAO
COMISSÃO DA CEDEAO

ECOWAS VISION 2050

"ECOWAS of the Peoples: Peace and Prosperity for All"

In pursuit of its Vision and objectives, the ECOWAS Authority of Heads of States and Government developed and implemented a Vision 2020 plan. The plan was adopted in 2007 and aimed to create a "borderless, peaceful, prosperous and cohesive region built on good governance and where people have the capacity to access and harness the enormous resources through the creation of opportunities for sustainable development and environmental preservation". Under Vision 2020, the region has made good progress in managing political crises, resolving conflicts and consolidating peace and democracy until the recent coups. Further, there was progress in advancing the common market, especially with the coming into reality of the free movement of people and Common External Tariff (CET) as part of the formation of a customs union in 2015, among others.

With the expiration of the Vision 2020 and the need to consolidate the successes and gains made under it, the Community developed and is currently implementing its Vision 2050 plan; "ECOWAS of the Peoples: Peace and Prosperity for All". It is to be implemented alongside other continental and global goals and frameworks. Key among these are the African Union's Agenda 2063, the United Nations Sustainable Development Goals, the 2015 Paris Climate Agreement, the African Continental Free Trade Area, Addis Ababa Action Agenda on financing for development and the 2020 Global Compact for Safe, Orderly and Regular Migration.

The aspirations of the Vision 2050 is reflected in five developmental themes:

1. Demography, human capital, social development and migration;
2. Environment and Natural Resources;
3. Governance, Security and Peace;
4. Economic growth, employment, structural transformation and private sector development; and
5. Economic and monetary integration, economic infrastructure, energy and partnership.

The overarching vision is to achieve "a fully integrated Community of peoples, living in a peaceful and prosperous region, with strong institutions and respect for fundamental rights and freedoms, striving for inclusive and sustainable development". This was developed based on an optimistic baseline scenario, Africa's Torch, with four key underpinning assumptions. These include:

1. an environment of enhanced security and consolidated peace;
2. good governance, strong and credible institutions that respect the rule of law and fundamental freedoms;
3. a fully integrated and globally competitive region in the context of sustainable development; and
4. an ECOWAS region with quality human capital and human development.

Accordingly, Vision 2050 is anchored on five main pillars, namely:

1. Peace, Security and Stability
2. Governance and Rule of Law
3. Economic Integration and Interconnectivity
4. Transformation, Inclusion and Sustainable Development and
5. Social Cohesion

Each of these pillars is further broken down into strategic objectives and orientations to guide the development and implementation of successive Medium-Term Strategic Frameworks. Aside from these, there are critical issues that are considered cross-cutting to enable the successful implementation and the attainment of the overall goals and objectives of the Vision. These include issues of women-gender, youth employment, digitalisation, climate change-resilience and capacity building.

Endnotes

1. The 2010 Human Development Report introduced the MPI and since 2018 the Human Development Report Office (HDRO) and the Oxford Poverty and Human Development Initiative jointly produce and publish the MPI estimates. Multidimensional Poverty Index 2023 Unstacking global poverty: data for high impact action Briefing note for countries on the 2023 Multidimensional Poverty Index

Cite this research

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Mr Enoch Randy Aikins joined the AFI in May 2021. Before that, Enoch was a research and programmes officer at the Institute for Democratic Governance in Accra. He also worked as a research assistant (economic division) with the Institute for Statistical Social and Economic Research at the University of Ghana. Enoch's interests include African politics and governance, economic development, public sector reform, poverty and inequality. He has an MPhil in economics from the University of Ghana, Legon.

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