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BRIEF FOR MR. CLAUSEN - WESTERN AFRICA REGION: Organizational Chart, WA Profile, Statistical Tables

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WESTERN AFRICA REGION BRIEF

April 24, 1981

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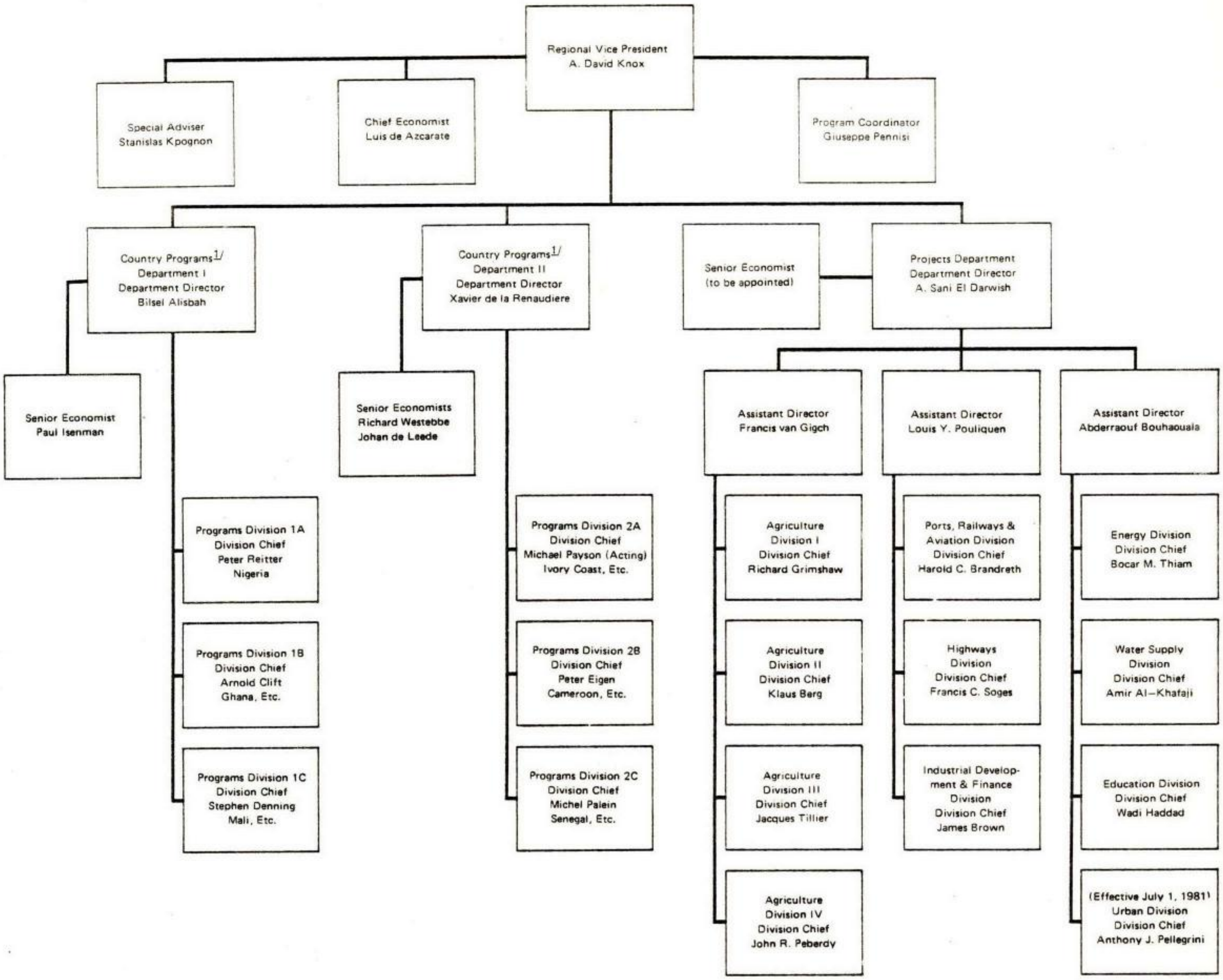
ORGANIZATIONAL CHART

WESTERN AFRICA REGIONAL OFFICE



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1/See Annex Table II D for Country distribution by Program Divisions

March 1981

I. WESTERN AFRICA: PROFILE AND PROSPECTS

1. This overview presents the salient features and trends that characterize the geography, politics and economics of the Region in both their commonality and their diversity (Part A). While long-term trends are only indicated, Part B will examine in somewhat greater detail the internal and external turbulences that have so seriously affected the economies of the Region since 1973. Part C seeks to identify the key issues around which governments as well as aid donors' policies will evolve over the coming decade or two. Finally, Part D briefly presents some special features of Bank Group operations in the Western Africa Region.

PART A - OVERVIEW OF CONDITIONS

Natural Environment

2. Western Africa as defined by the Bank 1/ (see maps) is inhabited by 161 million people (1979) who are unevenly distributed across the main ecological zones and among the 23 component countries: Nigeria (80 million) is the most populous country in the Continent; Sao Tome and Principe (110,000) one of the smallest.

3. From South to North, three climatic areas determine the natural environment that directly affects the agricultural and hence the living conditions of the majority of the population. The tropical zone (rainfall 1,200-2,000 mm) provides ideal conditions for cash crop production, especially from valuable tree crops (coffee, cocoa, also rubber, palm oil and coconut trees) as well as forest products and a wide variety of fruit and tubers (yams, cocoyams). The intermediate Soudanian zone is the area of the savannah (rainfall up to 1,200 mm) favorable to cereals (including millet, sorghum and maize), cotton and other crops such as groundnuts, cassava, sweet potatoes. Further north in the Sahelian zone the rainfall declines (below 800 mm) and becomes more erratic; the range of agricultural activities becomes much more limited (some cereals principally sorghum and millet, groundnuts, cowpeas). The area is utilized, however, for extensive livestock raising which is severely limited in the more humid southern areas because of the tsetse fly.

4. Notwithstanding many zonal and micro-variations to this broad pattern the Region shares three main features:

- The climate, because of excessive heat, or excessive humidity and above all because of the absence of winter (which controls the growth of bacteria, insects and plants in temperate climates), is generally inimical to human activity; though epidemics have become very rare, endemic diseases are prevalent everywhere; crops in the field or in storage suffer from a variety of poorly controlled pests and predators.

1/ Other bilateral and multilateral aid organizations (including the IMF) use different partitions of the African continent.

- The level of agricultural production is still predominantly determined by climatic conditions, especially in the Soudanian and Sahelian zones where rainfall can vary greatly from year to year.

- In rural areas, the pattern of employment remains dominated by the climatic cycle with heavy concentrations of work at certain peak periods (planting) frequently characterized by labor shortages, and long periods of low or no agricultural activity; little is known about non-farm rural employment.

Economic and Demographic Dimensions

5. By any economic standards, all the countries in the Region are small: the total gross national product of the most populous one, Nigeria, is about the same as that of Denmark which has a population 16 times smaller; although income per capita in the Ivory Coast is the highest in sub-Sahara Africa, 1/ its total GNP is about one tenth that of Sweden which has about the same population. In fact, the combined GNP of West Africa is of the same order of magnitude as that of Switzerland. 2/

6. Aside from important common features determined by the ecological environment, the countries of the Region differ markedly in size, economic potential and performance, as well as in their political and socio-economic make-up. Demographic characteristics on the other hand, and aspects of the political scene are common to most if not all countries.

7. Except in a few areas of the forest zone in Gabon and Southern Cameroon, population growth is high: about 2.7% p.a. on average, more than 3% in some cases and, rarely below 2.2%. Fertility rates (generally between 6 and 7%) are also high, have been increasing and show no indication, in general, of a downward trend. Mortality rates, on the other hand, have been declining historically since the colonial period, mainly as a result of the elimination of epidemics. Even if, as analysis of fertility determinants suggests, fertility rates should begin to decline in the decades ahead, it is likely that total population by year 2000 will have increased by 70% or so, and exceed 280 million people.

8. Rapid population growth means a high proportion of young people (typically over 40% are under 15), high dependency ratios (one or slightly above) and a faster than average growth of the labor force, with all the attendant pressures on education and health services, a growing demand for jobs, and also rapid urbanization (urban population grows between two and three times faster than total population). It also means a higher degree of political activism animated by the younger groups of society, especially those with some degree of education.

1/ Excepting Gabon (US$3,280) which is in the exceptional position of having a very small population (645,000) and large oil and other mineral resources.

2/ Because conventional accounting methods tend to underestimate incomes in low income countries these comparisons, especially as measures of "welfare," should not be taken too literally.

Political and Economic Systems

9. Africa has become synonymous with political instability. Instability is no surprise in a region where few countries have achieved real nationhood. But the picture in West Africa is quite mixed. There have been "coups d'Etat" in about 15 countries since independence (1960 in most cases) and attempted coups in some of the others; there are now 7 or 8 military regimes, and three regimes with freely elected parliaments (Nigeria, Ghana, Senegal), the other half of the group being under "presidential" regimes led by civilians but of varying degree of political freedom: the Ivory Coast, Cameroon, or the Gambia could be characterized as "enlightened" autocracies rather than dictatorships. Similarly, military power is not synonymous with oppressive systems (e.g. Upper Volta, Niger). Four countries have self-declared Marxist-Leninist systems: Guinea (since independence), the Congo (since 1967), and Benin (since 1974); Mali, Guinea-Bissau, Sao-Tome and Principe have also officially espoused "socialist" systems although each of them has its own peculiar coloration. It should be noted at the same time that great stability has prevailed in Cameroon, Ivory Coast, Gabon, Senegal and The Gambia.

10. Economic systems are hard to classify in any clear-cut way, and the official rhetoric is no great help to the understanding of each system. In all cases, however, the government intervenes in the economy in three main ways: (i) through regulatory measures especially in pricing; (ii) through public investment, which is a large share of total investment: rarely less than 50% (although nowhere as much as 100% if one includes investment by small farmers in the form of on-farm improvements and dwellings); (iii) through a variety of public enterprises in public utilities, agriculture, manufacturing and marketing. The distinguishing features are rather the degree and perhaps even more so the quality of intervention in these areas. For example, the governments of Cameroon, Ivory Coast, The Gambia or Upper Volta have been much more attentive to world price trends in fixing producer prices for agricultural commodities than those of Ghana or Guinea where massive overvaluations of the exchange rates prevail, while in Mali a strong urban bias in pricing has translated in consistently depressed producer prices and unsustainable consumer subsidies. In general, programming and selection of public investment projects has led to more efficient allocation of resources in the more market-oriented economies than in the more socialistic ones. In fact, somewhat paradoxically, the planning process has always been the weakest, in both organization and content, in countries with socialist regimes (Guinea and Congo and also Mali are prime examples), whereas, Ivory Coast, at least until the recent past, or Cameroon have made better use of their planning systems. One common feature in practically all countries, however, has been the poor performance of public enterprises as seen in their increasingly negative contribution to public savings, also as regards their sectoral objectives, be it the promotion of rural development (e.g. Senegal), or supplying fertilizers and other inputs (e.g. Nigeria) or supplying electricity (e.g. Nigeria or Sierra-Leone), etc. In countries with such different regimes as the Congo or Guinea (socialist), Senegal (mixed), Ghana, Ivory Coast or Togo (more market oriented) the problem of reforming public enterprises as regards financial management, employment and wage policies, or overall technical efficiency has become a most acute one.

Growth Performance

11. Overall growth performance over the last two decades has been mediocre for the Region as a whole, but with increasingly wide differences between countries. Excluding Gabon, the range of GNP per capita is in a ratio of about 1:10 (between Mali and Ivory Coast) against 1:5 in 1960. In terms of growth record, based on the World Development Report Indicators (1980) and the Bank Atlas, the countries of the Region can he grouped into three broad categories for the period up to 1978, i.e. before the large oil price increases of 1979-80 (in roughly descending order of per capita GNP growth per annum in each group):

- countries with significant increases in per capita GNP (2% p.a. p.c. or more): Gabon, Togo, Nigeria, Mauritania, Cameroon, Ivory Coast, Liberia;

- countries with marginal increases (up to 1.5%): Niger, 1/ Upper Volta, Mali, Congo, CAR, Guinea, Benin (the last four with increases of less than 1% p.a.);

- countries with no increase or marginal declines: Chad, Senegal, Sierra-Leone, Ghana.

Countries for which long-term data are not available--The Gambia, Guinea-Bissau, Equatorial Guinea and Sao Tome and Principe most probably fall in the third category.

12. The Western African countries are very "open" with exports of goods and non factor services representing typically one-fourth of GDP and, considering their low levels of income on average, the rate of domestic investment has been high historically, typically around 20% of GDP. As imports have consistently exceeded exports and domestic savings have been less than investment, the resource gap--which has varied within a very wide range of 2% and 30% of GDP depending on the time and the country--has been financed predominantly by foreign public aid until the mid-seventies, and since then in a growing number of cases by borrowing from private sources to a much greater extent than heretofore. While it is difficult to generalize, it emerges that growth has been faster in those countries with a higher share of exports and consequently, given capital inflows, a greater import capacity. At the same time the quality of investments seems to have been a more decisive factor of growth than their relative level, as evidenced by highly variable ICORs among countries and between periods. While changes in the terms of trade have not been a major factor in the long run, they have been much more important since 1973/74.

1/ Niger is shown as a country with a decline of GNP p.c. in the Bank Atlas (1979) for the period 1970-77 but this is not borne out by more recent information.

Poverty and Basic Needs

13. Western Africa includes 9 of the 30 countries classified as "least developed" by the United Nations. Except for a few (Gabon, Ivory Coast, Nigeria, Congo and Cameroon) all the countries have incomes per head below US$500 and are "low income countries" by the World Bank's definition. Even in the five "lower middle income countries", large segments of the population, Nigeria being the prime example, feature very low levels of cash and real income. As most poverty or basic needs indicators are closely correlated with income, it is clear that poverty, in any sense of the word, is widespread even though the concept of "absolute poverty" and its statistical measure are extremely difficult to determine, at least in the African context.

14. Some notable dimensions of poverty and basic needs in Western Africa appear to be the following. First, a very low level of life expectancy at birth of 44 years (versus 51 years for all low income countries) which is mainly the result of very high rates of infant mortality caused by the incidence of a variety of diseases (mainly respiratory and gastro-intestinal infections). These are linked principally to a number of factors, of which lack of parental education (with its effects on family feeding, health and hygiene practices), lack of health care facilities, a serious problem in most countries, and also lack of food (among poor families) and inadequate water supply (inadequate quantities for hygiene and quality for drinking). Starvation, except very exceptionally at times of prolonged droughts in remote areas, is not a feature of West Africa. On the other hand, debilitating diseases--from malaria to bilharzia and severe gastro-intestinal infections--affect virtually every person.

15. The level of education is dismal in almost every country, with adult literacy generally in the range of 10-20% of the population. Substantial efforts have been made over the past three decades to expand educational opportunities, and enrollments have increased at unprecedented rates. However, countries are still very far from universal primary education, because of the low level they started with and the financial and managerial constraints they face: the proportion of children aged 6-11 enrolled in school is 50-75% in 8 countries, 25-50% in 7 countries, and less than 25% in Mali, Mauritania, Niger and Upper Volta. Further education development is affected by a number of factors: education expenditures (for all levels) loom very large in all government budgets (between one-fifth and one-half of all current outlays); unit costs of secondary and higher education are exceptionally high; inefficiencies keep both the number of students and the quality of education they receive below what available resources permit, and the capacity for planning, managing and implementing educational development is inadequate.

16. While poverty in West Africa is generally associated with living conditions in rural areas where on average 80% of the population live, a new class of poor is emerging in the cities, especially the large ones (Lagos,

Abidjan, Dakar, Accra, etc.). The modern sector provides far too few jobs to employ both migrant and local labor forces so that the bulk of the job seekers find some form of employment in the thriving urban informal sector. While the informal sector offers opportunity, upward mobility and some access to basic public services, it cannot absorb at reasonable incomes the huge numbers looking for work so that growing slums and poverty are increasingly a feature of Africa's cities. The urban poor who have more or less definitively severed links with their traditional milieu thereby forego the support provided by the "extended family" system which is the most effective "safety net" at work in Africa. Urban poverty poses an immediate social problem and potentially is a source of political instability.

PART B - THE SHOCKS OF THE SEVENTIES

17. For the countries of West Africa, the sixties and early seventies were a period of consolidation of post-independence progress in building up more cohesive nation-states, in more effectively integrating national economies and in taking steps to strengthen inter-African links. As noted earlier, economic growth was uneven. However, no major turbulences affected the Region (although Ghana, already a notable exception suffered from severe mismanagement ever since it became, in 1975, the first former colony to gain independence); external deficits were normally financed by aid on essentially concessionary terms, the level of indebtedness was modest, inflation remarkably low (exceptionally above 3% p.a.), and most countries could look forward to a future of real, albeit in many cases, slow economic progress.

18. At the outset of the eighties the situation is one of much greater contrast between countries; in general, however, the outlook appears distinctly grimmer and an atmosphere of disillusionment and often outright pessimism pervades official and private circles, inside and outside the countries of the Region. This, essentially, is because of what happened during the seventies.

1973-78 First Shocks and Misdirected Response

19. The external shocks that affected the Region during the first "cycle" were of a diverse nature and impact:

- The "great drought" of 1972-74 affected most the eight Sahelian countries and also the northern areas of other countries;

- the quadrupling of crude oil prices in 1973-74 naturally affected the few oil exporters (Nigeria, Gabon, Congo) and the oil importers in opposite ways;

- much higher inflation in OECD countries reflected in higher import prices for the Region as a whole; while

- very wide fluctuations in the prices of several key export commodities had a more differentiated impact, affecting principally half a dozen countries.

20. The drought which resulted in two or three crop failures in a row not only severely affected exports (groundnuts, livestock and cotton) from the Sahelian countries but also forced hordes of nomads (especially in Mauritania, Mali and Niger) and even sedentary farmers to flee to the south, and cluster around the cities in refugee camps where food relief was more easily available. The direct impact on loss of human lives is not known but it was not as large as was often assumed (certainly nothing like what seems to have been the case in Ethiopia, for example), but no doubt many more infants and old people died than would have been the case otherwise. Between one-third and two-thirds of the herds were killed but had been reconstituted by the end of the seventies in most cases.

21. The direct response of governments was necessarily limited for lack of means to acquire foodstuff from abroad on commercial terms; besides, prices of imported grains, especially rice, reached unprecedented levels in 1973 and 1974. Relief was provided on a massive scale by the international community, both bilateral and multilateral agencies. Inefficiencies, favoritism and corruption in the distribution of food within each country occurred. At least in part for those reasons, the government in power since independence in Niger was overthrown (1975) by the military. A great deal of the political tension still present in Mali also has its roots in the mishandling of the food supplies during the drought period.

22. The drought exposed the fragility of the Sahelian economies; it illustrated in a dramatic manner limits to production in this area compounded by the absence of a technical package fully adapted to the Sahelian region's rainfed agriculture and husbandry; it called attention to the problem of water control and water use but, while most Sahelian governments see the solution in large irrigation schemes, they tend to overlook the enormous unit costs involved and the special management skills required in an area where farmers are without any background in modern or in irrigated agriculture. Another preferred "solution" with most governments is state monopolies for food marketing combined with large scale "security" stocks even though experience (Mali being perhaps the best example) has shown the interventionist solution through state monopolies, in one form or another, to be costly, inefficient and a disincentive to the farmer. Finally, food subsidies introduced in several countries have proved very damaging to the government budgets.

23. The first oil shock did not have the same direct adverse effect as in other parts of the world simply because oil imports typically were well below 10% of total imports. Also, all oil importing countries (except Ivory Coast and Senegal at that time) purchased refined products whose prices increased by about half the crude oil price. Moreover governments responded well to the "energy crisis" to the extent that the higher cost of energy was generally promptly passed on to the users and by giving considerable impetus to oil exploration. The fruits of these efforts are becoming apparent now (in Ivory Coast, Cameroon, Senegal, Ghana, etc. and also in oil exporting Congo and Gabon).

24. Far more severe was the effect of the increase in all other import prices as well as freight costs. These were the main factor in the deterioration of the terms of trade, and constituted a strong cost-push element of inflation subsequently fed by growing fiscal deficits and accommodating monetary policies. There are indications also that African countries were often charged exorbitant prices for a variety of imports, especially capital goods. With very little scope for efficient import substitution in the short run and a distinct reluctance on the part of governments to adjust exchange rates, higher import prices were introduced throughout the economic structure.

25. What has most seriously weakened the economic positions of the countries in the Region, however, is the policy measures that accompanied or followed the movements in commodity prices (including petroleum). In effect, the large and sudden increases in export and fiscal revenues that accrued to a number of countries at various times between 1973 and 1978 as a result of world price increases of phosphates (Senegal, Togo), coffee and cocoa (Ivory Coast, Cameroon, Ghana), uranium (Niger), of course petroleum (Nigeria, Gabon, Congo) and to a lesser extent palm oil, cotton and others, gave rise to expectations that those prices would stabilize at their new levels or even continue to ascend. Within, and more often outside, the frame of their formal development programs, governments promptly engaged in new capital expenditures (e.g. Nigeria, Ivory Coast, Gabon, etc.). This was done without much regard for the intrinsic merits of the projects, their proper timing or the unit costs involved. In some cases the bulk of the incremental resources went into additional consumption (e.g. public sector salaries in the Congo), or purchase of existing assets (e.g. "participations" by the Senegalese government in private enterprises). Furthermore, in order to complement their own resources, and because of their apparent creditworthiness combined with the liquidity of the international capital market, the countries which had benefited from the commodity boom--and others as well, e.g. Sierra Leone--could engage in external borrowing on an unprecedented scale and often on very hard terms.

26. There were variations of course. Niger despite a doubling of budget revenues between 1975 and 1978 due to uranium exports first invested these additional resources into financial instruments although more recently it has engaged in what seems to be unnecessary foreign commercial borrowing for low priority projects. Cameroon, on the other hand, has consistently followed prudent fiscal policies and has uniquely emerged unscathed from the turbulences.

The Second Oil Shock and the Need for Adjustment

27. The stabilization (and decline in real terms after 1974) of oil prices, even more so the fall in all other commodity prices together with enormously increased import levels linked to very high rates of domestic investment (e.g. over 30% of GDP in Nigeria, Ivory Coast, Gabon, Togo), or increased consumption (Senegal, Congo, etc.); the rapidly mounting debt service; the poor or negative returns on hastily decided investments (of which the sugar mills in Ivory Coast have become a rather embarrassing symbol in

West Africa) have caused huge and growing deficits in the public sector and the balance of payments. Even Nigeria, in 1978, was facing a virtual crisis in external payments. Whereas typically, the current account deficits would range between 3% and 6% of GDP before the "shocks," they were generally multiplied by two or three before the new doubling of oil prices in 1979/80. But, not surprisingly, governments found it very difficult if not impossible to cut expenditures of the public sector--central government budget and public enterprises alike--in any degree commensurate with a viable level of internal and external deficit in the short run.

28. The second "oil shock" and the aftermath of the previous cycle have several effects. First, the hike in oil prices has clearly facilitated the adjustment task of oil exporters, especially so for Nigeria and Gabon which also had undertaken rather forcefully to contain aggregate demand since 1978. Conversely, the oil bill has now become a serious burden for net oil importers representing often around 20% of their export proceeds. Combined with ratios of debt service to exports ranging between 15% and 30% for such countries as Ivory Coast, Senegal or Togo and added to the cost of incompressible imports (with food representing also 15 to 20% of imports in many cases), it has made the management of the balance of payments much more difficult. At the same time, prospects for additional concessionary aid are at best uncertain, and private foreign lenders have become distinctly more reserved, particularly so vis-a-vis Africa. The price prospects for most commodities exported by West Africa also give no reason for particular optimism.

29. At this point, it is abundantly clear that the countries of West Africa have no choice but to undertake economic adjustment in earnest. There are indications that most governments, this time around, are determined to at least avoid the mistakes of the past decade and, in some cases, to face up to the task of reforming policies. This means several things.

30. First, for the "traditional" oil exporters, and in the years to come for the emerging oil exporters (notably Cameroon and Ivory Coast) it means avoiding the mistakes of the previous cycle and being much more careful as to the composition and timing of new investments.

31. For oil importers, adjustment requires measures to contain aggregate demand. This will be easier in places where investment rates had reached extreme heights (e.g. Ivory Coast or Togo) than in such cases where the share of aggregate consumption in GDP is excessive and investment is at already modest levels (e.g. Senegal or Mali and other resource poor countries). Rescheduling or renegotiation of foreign debt has been undertaken by several countries already through the Paris Club (e.g. Liberia, Sierra Leone, Togo) or bilaterally (Senegal, Congo).

32. Increasingly so, West African countries are having recourse to IMF facilities (whereas the Fund had very little involvement in this part of the world until the mid-seventies). Senegal has negotiated an Extended Facility (July 1980), followed by Sierra Leone and Ivory Coast in 1981. Several other such facilities are under discussion (Mali, Ghana...).

33. The program of structural adjustment undertaken by Senegal since the middle of 1980, with support from the Bank, the IMF and bilateral donors, illustrates the extent of the reforms that may be needed when major imbalances, as is frequently the case, are rooted in historically deficient policies and institutions. The program seeks to increase public savings (to a modest level of 15% of public investment to start with) through better resource mobilization (tax collection) and above all through slower growth of current expenditures; credit expansion is to be severely limited; so will foreign borrowing, in order to maintain the debt service at around 15% of exports; the public investment program for 1981-84 is to be trimmed, its composition tilted towards more directly productive sectors, and projects will be selected according to more rigorous cost-benefit analysis. Major parts of the incentive system are to be revised: higher and more uniform import tariffs, as well as export subsidies on a limited scale, have been introduced; consumer prices are to be gradually decontrolled, producer prices made more remunerative and subsidies (on inputs and consumer goods) reduced over time. The parapublic sector, especially rural development agencies have undertaken to prepare "program contracts" designed to clarify objectives, internal structures and financial relations with government.

34. The comprehensive program is meant to cut approximately in half the external deficit on current account (18% of GDP in 1980, 20% in 1981) and lay the foundations for sustained growth, at 4% p.a. or so, over the coming years. However, another poor crop which may have reduced exports of groundnut products to zero in 1980-81 has greatly compounded the difficulties. While the government will need to remain committed to the program, more time than previously foreseen may be necessary to achieve its main objectives.

PART C - ISSUES AND PROSPECTS

35. The World Development Report (1980) projects rates of growth of GNP per capita for the "low income" countries of sub-Sahara Africa of only 0.1% p.a. for 1980-85 and 1.1% p.a. for 1985-90 under the best scenario. "Middle income" Africa would do a little better with rates of 1.7% and 1.4% respectively. While those numbers call attention to the difficult circumstances in Africa, they conceal potentially quite large differences between Eastern and Western Africa and among countries within each region. At the same time, issues related to the problem of primary commodities and those related to population and human resources are common, in varying fashion, to all countries.

Country Prospects: a Typology

36. The countries of West Africa can be classified into three broad groups on the basis of two principal though not readily measurable parameters: the resource base and the quality of economic management based on past performance.

Major Oil Exporters: these are the same as in the past--Nigeria, Gabon, Congo--although the prospects for sustained production beyond the next 15-20 years are in all three cases uncertain. In the meantime, however, foreign exchange should not be a constraint and growth of GNP could be in excess of, say, 5% p.a. on average. The problem in these countries is to ensure a use of the oil resources in ways that avoid major distortions--in income distribution as well as in the incentive system--and prepare the transition to a period where oil will be less, or perhaps much less, important. Nigeria, where clearly the problems are compounded by the size of the country and by regional disparities is presented in some more detail in "Country Profiles."

Resource rich countries, which include some where oil also is emerging as a sizeable new resource--especially Ivory Coast and Cameroon--are, by and large, the group of coastal countries in the tropical area, where in general the combination of climate and soils permits a diversification of agricultural production--foodcrops as well as a variety of "export crops"--where access to and from foreign markets is easy and where, in cases, sizeable non-fuel mineral resources exist. Not all coastal countries, however, are in this favorable position. Mauritania and Senegal, despite good location and some mineral wealth (iron ore and phosphates respectively), otherwise share in all the problems of the Sahelian zone. Cape Verde and The Gambia are also Sahelian countries and have no known mineral resources. Similarly Benin, because of some climatic anomalies (lower average rainfall) does not offer the same agricultural potential as most other coastal countries and has no mineral resources (except for limestone).

37. In this group, the difference between poor and good performance will depend essentially on the quality of management. This is vividly illustrated by the contrast between the Ivory Coast with a historical growth record over twenty years of over 7% p.a., and Ghana (or Guinea) where despite as good a natural potential as Ivory Coast (and certainly a better one in terms of human resources at the time of independence) per capita income has declined over time (see "Country Profiles").

38. The third group, of resource poor countries, suffer from one or a combination of severe constraints--very harsh climate, enormous distances, being landlocked, etc.--that make socio-economic development problematic under the best circumstances. These include the eight Sahelian countries and the exceptions to the previous group mentioned above. This category might perhaps be labelled the "at best 4% league" to signify that even with good policies the essentially rural nature of the economy, the narrow export commodity base and frequent crop failures (e.g. 7 out of the last 13 years in Senegal) make high rates of growth virtually impossible. Nevertheless the quality of management and, more than anywhere else, the level and appropriateness of external aid will make the difference between those countries where GNP growth will exceed, albeit marginally, the growth of population and those where stagnation or declining incomes will not even permit meeting the most basic human needs. (See "country profile" for Upper Volta)

The Commodity Problem

39. Production of commodities, principally agricultural but also fuel and non-fuel minerals, is and will remain the economic basis of all West African countries. This includes practically all of the food consumed in rural areas and large, though declining shares of food supplies to urban areas; they compose about 80-90% of all goods exports. Petroleum aside, prospects for world prices 1/ are mixed with moderate declines (for 1990) projected for most agricultural commodities and a significant fall for cocoa, significant increases projected for cotton and timber, moderate increases for groundnut oil, iron ore and phosphate rock, and little change for bauxite (all in constant dollars 1980). Given projected world inflation, these prospects suggest that in general the terms of trade will not improve, at best. Besides, most exported commodities, especially coffee and cocoa, are subject to wide yearly fluctuations.

40. Leaving aside the question of international commodity agreements, three most common issues deserve attention:

41. First and foremost is the question of how to increase commodity production and most critically how to increase labor productivity in agriculture and reverse the downward trend in food production per capita which has prevailed in all but perhaps 3 or 4 countries. This in turn will require (i) a more effective incentive system i.e. producer prices for exportables which are not too low relative to world prices and move in tune with these over the medium term; in most cases less government interference with the trading of domestic foodstuff; and often higher import taxes on "luxury" food imports, principally wheat and rice, to better reflect their opportunity cost to the economy; (ii) more investment in rural infrastructure, especially feeder roads to expand the market and reduce the enormous cost and human labor involved in marketing outputs and inputs; (iii) more efficient delivery of inputs (principally fertilizers) and credit, rather than what is generally now an indiscriminate subsidization of both combined with inefficient parastatal delivery systems; (iv) location-specific research especially for drought resistant varieties and design of effective technical packages for the Sahelian region; (v) consolidation of results achieved in small-scale irrigation before embarking upon large-scale river development schemes.

42. The second broad issue concerns the economics of commodity processing and resource-based industrialization. While aiming at increasing value added from domestically produced raw materials would appear, prima facie, a sound course for industrial development and is indeed a preferred strategy of most governments, numerous case studies in West Africa and elsewhere show that more often than not such projects are poor propositions for earning or saving foreign exchange. No single causal pattern emerges: very narrow processing margins, the marketability of byproducts, quality aspects, existence of spare capacity in the industrialized countries, scale factors, excessively generous

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1/ See: Price Prospects for Major Primary Commodities, January 1980, World Bank, Report No. 814/80.

incentives to foreign investors, lack of complementary inputs (power, etc.) and managerial inefficiencies are some of the factors at play. More generally production costs in West Africa are high, including labor costs because of relatively high wage rates (at current exchange rates) and low labor productivity. Policy makers and aid donors alike should further investigate which causes could be remedied locally (through such diverse actions as implementing regional common markets, modifying the "investment codes" for foreign investment, or establishing marketing arrangements with foreign industrialists), and which are beyond the countries' control. Some costly mistakes have already been made but with manufacturing sectors contributing generally well under 20% of GDP, there is ample scope for industrialization that avoids the all-out import substitution strategies that have proved so costly to many countries outside Africa.

43. There is, thirdly, the need for more active and better oriented short run demand management in the face of volume and price fluctuations that beset commodity markets. The experience of the seventies has shown, with very few exceptions, that in times of commodity boom, government policies have tended to be over expansionary and at times of depressed markets, insufficiently deflationary, thus creating unsustainable deficits. Budgetary, tax, credit, borrowing and exchange rate policies in small, open economies cannot be expected to be entirely effective in correcting the impact of external shocks, but with support from such aid mechanisms as the IMF compensatory facility and the EEC's Stabex, they could better steer the economy through the cycle. Cameroon is evidence of this.

Population and Human Resources

44. The main issues for the future concern population growth, education and public administration. In general, the arguments against suggestions that slowing down population growth might be beneficial for society and ultimately for individuals is that (excepting Nigeria) populations are small by any international standards thus restricting the size of the market; that there is plenty of unoccupied land, that a "young" population is more dynamic; and that on religious or other grounds "family planning" concepts would be politically dangerous. Except for their political dimension, all these arguments are weak--but unfortunately rather strongly held in Africa.

45. Although no single country has officially adopted a "population policy," the deteriorating employment situation in the cities, unsatisfied demands for health services and the growing burden of education costs on public budgets have led to a greater awareness of the problem. Quite possibly Western Africa is entering a transition period where through a micro-approach based on welfare and health considerations at the household level, methods of birth control can begin to be introduced. In the cities, there is a perceptibly growing demand by women for contraceptive methods. Mothers' education and improved child care would appear to be the main areas where the "population problem" can more effectively be tackled. However, the costs and management aspects of large programs of basic health, especially in rural areas remain largely unsolved (the first "rural health mission" in the Region took place in 1980 in Mali).

46. Like "tax reform," educational reform in Western Africa seems to be a perennial subject of preoccupation. In short, effective action for the future seems to be mostly needed in four directions: (i) maintaining the thrust towards expanding and equalizing opportunities for primary schooling, while improving the quality of school resources; (ii) improving efficiency at all levels, and reducing unit costs at secondary and higher education, including introduction of a degree of cost recovery (and make scholarships much more selective); (iii) introducing much greater selectivity in access to university, especially in the non-technical areas; and (iv) discontinuing policies of near automatic hiring of secondary and university level graduates into the public sector (a practice in force in some countries).

47. The inefficiency of public administration among countries in the Region has become even more apparent under the deteriorating economic conditions of the last few years. Economic management at the macro-economic and at sectoral levels is poor not only because of lack of "high level managers;" it is even more so the result of undermanning in specific areas--middle level technicians, accountants and auditors being prime examples; and it is also very largely because of excessive political interference with rational resource allocation and a deliberate undermining of systems of financial and personnel control. Precisely because of this particular political dimension, assisting in "improving" public administration is an area where we are only beginning, in respect to Western Africa, to attempt more specific diagnoses in selected cases. In a few countries, however, (Ghana, Niger) technical assistance projects with a rather broad scope are under preparation.

PART D - SOME SPECIAL FEATURES OF OPERATIONAL WORK IN WESTERN AFRICA

48. The problems of Western Africa, with seemingly "short-run" financial crises compounding the basic task of developing a region with massive environmental constraints, very few indigenous skills, unstable administrations, fast population growth, immense aspirations and pervasive frustrations may seem a nearly impossible one. Yet, a largely unexploited resource potential exists--both in material and human terms. Social progress has not been absent--at least all "social indicators" while still abysmally low have improved. Countries like Nigeria, Ivory Coast, Cameroon, Gabon, and others such as Ghana or Guinea when basic policy deficiencies are corrected, should impart added dynamism to the Region as a whole. Serious efforts towards regional cooperation are being made (see Appendix papers on this), although governments themselves recognize that it will take one decade or more for arrangements such as ECOWAS 1/ to become substantively effective. Finally, from the unhappy experience of the seventies, there has emerged among governments a new sense of urgency regarding policy and institutional reform. There are thus grounds for cautious optimism.

1/ Economic Community of West African States - See Appendix paper.

Trends in Operations

49. In the early sixties, the first task was to establish the Bank's credibility in countries, especially the former French colonies, where the institution was virtually unknown. This could be done only through a gradual development in project lending throughout the Region. Most projects were in the areas of infrastructure and public utilities. The Bank Group was then a modest partner in the aid effort towards Africa relative to other donors, mainly France and the EEC. In the late sixties and early seventies, our lending activities diversified rapidly into productive sectors, principally agriculture first, concentrating on export crops, and later, rural development.

50. Annual average lending was US$258 million in 1971-75 in current prices or 6.7% of total Bank Group lending (IBRD and IDA). It increased steadily to US$732 million in FY80 and is projected at US$980 million for FY81, of which US$369 million IDA credits and US$611 million in Bank loans. This represents an increase of 54% in constant dollars (1980) between FY71 and FY80. In FY81, the share of Western Africa will be 6.5% and 10.3% of IBRD and IDA commitments respectively. In constant 1980 prices average annual lending rose from US$503 million in 1971-75 to a projected US$915 million in FY81, of which US$372 million IDA credits. Western Africa's share of total IDA allocations averaged 8% in the FY78-80 period and is projected to rise to 10% in FY81, and its share of total Bank/IDA rose from 6 to 8% in the same periods. Only Nigeria and Ivory Coast are "pure" Bank countries while Cameroon, now a "blend" country, may join this group in the near future; Liberia and Senegal are "soft blend" countries and all the others (except for eventual "enclave" projects) are IDA countries (18). The Congo's creditworthiness, however, is under review and the country may be reclassified as a Bank borrower.

51. In practically all countries, the Bank Group is or will soon become the single most important source of official aid, although in practically all French speaking countries France plays a special role, remaining the main source of technical assistance.

52. An important aspect of the Bank as a vehicle of resource transfer to Western Africa is the role of co-financing which has permitted to attract an additional volume of external resources (over the period FY75-FY80) equivalent to 60% of Bank Group lending proper. In virtually all cases, the Bank has played a leadership role in both project design and in financial arrangements in which 36 bilateral and multilateral agencies have been involved. While at the early stages of our involvement in West Africa, the Bank was greatly assisted by other donors with experience in the Region, the roles are rather the reverse now.

53. Direct involvement in project identification and preparation is another special feature (in common, no doubt, with Eastern Africa). At best, governments come up with project ideas sometimes reflected in their official public investment programs, sometimes not. The formalization into a full project concept, however, is in most cases the product of Bank identification and preparation missions (often originating in the Western Africa Regional Mission in Abidjan whose primary task is project preparation, but also

sometimes in individual country missions), and work done by Bank-financed or Bank-supervised consultants. Similarly, during the implementation period, technical assistance financed by the Bank and also Bank supervision missions often are necessary instruments for achieving the project's objectives.

54. Such heavy involvement in the project cycle is a form of technical assistance that governments welcome. It is not without risks, however. In designing the project, too little involvement by the local authorities may create frustrations and lack of interest in the project's fate. All too often in Africa, projects are entirely associated to their main external sponsor and find themselves detached from the main stream of activity of the national agency that should feel primarily responsible for their success or failure. However, more active participation by national institutions (and also national consultants) in project preparation and implementation, although already a discernable trend in several countries, can only occur at the pace at which public administrations in general improve. Where sufficient progress is evident in this area, we consider sector lending a convenient modality of resource transfer: the first loan of this type was made to the Ivory Coast for highways in FY81 (US$100 million). In order to assist government in identification and preparation of projects, a Regional Mission (RMWA) was established in Abidjan (Ivory Coast) in 1965. RMWA now has an established 17 higher level positions. We have also 7 Resident Representatives (see Organizational Chart).

55. The share of total project cost financed by the Bank Group in Western Africa is, with the notable exception of Nigeria, well above the norm for other Regions (except Eastern Africa). This often involves financing local costs on the grounds that lack of public domestic savings is often as severe a constraint as shortage of foreign exchange, and current trends, as noted earlier, do not point to an improving situation in this respect. On the other hand, the financing of recurrent costs associated with development, including externally-financed projects, raises difficult policy as well as operational issues of importance for several countries, especially in the Sahelian region. A study of this and the related issue of cost recovery and users' charges has been commissioned by CILSS 1/ and is being finalized by a consortium of international consultants.

New Directions

56. In the course of the last few years, as a result of both our expanding operations across sectors and the turbulences of the seventies, the dialogue with our borrowers on macro-economic policies has assumed new dimensions. As noted, in the case of Senegal, this has led to structural adjustment lending. Discussions on a broad front of issues that could lead to non-project lending have been underway for several months with the governments of Ivory Coast, Mali, Ghana and Togo. In all cases, we are working in close cooperation with the IMF. Importantly, although clearly the aim is not a SAL type of operation, policy discussions with Nigeria have developed in an atmosphere of mutual understanding that is quite different from the situation of only a

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1/ Comite Inter-Etats de Lutte contre la Secheresse au Sahel.

very few years ago. In this, as in the growing number of cases where Bank's advice on macro-economic and sectoral policy matters is sought by governments, we have a need--indeed an obligation--to add depth and coverage to our economic and sector work.

57. Technical assistance in a variety of forms--as part of regular projects, as projects in their own right at national (planning, debt management, etc.) and sector level including energy, and through policy-oriented economic and sector work--will assume an increasing role in our operational work. However, though not involving large amounts of money, technical assistance requires special skills not always easily available in the Bank or to the Bank for application in such notoriously difficult areas as sub-Saharan Africa.

58. While causes for reasonable expectations have been noted, it should not be excluded that in the coming years, mounting social and political turmoil or financial chaos will create impossible operating conditions in a number of countries. Clearly also, effectively expanding our "traditional" lending program and developing new type activities implies sustained increases in the levels of financial and manpower resources devoted to West Africa.

Statistical Tables

II. STATISTICAL TABLES[1/]

II. A. Lending Volume - Western Africa

	Annual					5-Year Totals				Memo
	FY79	80	81	82	83	Through FY68	FY69 -FY73	FY74 FY78	FY79 -FY83	FY81 FY85
Dollar Millions										
IBRD	317.1	439.2	566.6	655.0	787.0	411.5	589.2	1235.1	2746.4	3885.1
IDA	239.2	292.4	370.5	282.1	420.0	83.4	298.3	738.9	1626.3	1876.7
TW	-	-	-	-	-	-	-	83.6	-	-
Total	556.3	731.6	937.1	937.1	1207.0	494.9	887.5	2057.6	4372.7	5761.8
Constant FY80 $	598.8	731.6	875.8	821.3	994.5		2313.1	2925.2	4025.1	4709.6
No. of Operations										
BRD	13	12	11	14	18	20	39	69	68	85
IDA	22	18	23	25	28	8	60	78	117	131
TW	-	-	-	-	-	-	-	5	-	-
Total	35	30	34	39	46	28	99	152	185	216

Memo: No. of countries in Region

IBRD	3
IDA	15
IBRD/IDA blend	5
Total	23

Median per capita income

1/ Because of differences in period, sources or methods of estimation, differences in GNP and GNP per capita may appear for some countries in different parts of this brief.

II.B. AMOUNT OF IBRD/IDA LENDING BY SECTOR - WESTERN AFRICA REGION
(NOMINAL $ MILLION)

SECTOR	ANNUAL					5-YEAR TOTALS				MEMO
	FY79	FY80	FY81	FY82	FY83	THRU 68	FY69-73	FY74-78	FY79-83	FY81-85
AGRIC. & RURAL DEVT.	174.1	238.0	277.0	397.0	425.0	18.0	153.0	853.7	1511.1	2112.0
URBANIZATION	12.0	17.8	.0	129.5	45.0	.0	8.0	52.2	204.3	324.5
SMALL SCALE INDUSTRY A/	12.6	18.0	27.9	40.0	45.0	.0	.0	73.6	143.5	157.9
POP., HEALTH & NUTRITION	.0	.0	.0	.0	23.0	.0	.0	.0	23.0	153.0
WATER SUPPLY & SEWERAGE	115.0	21.0	73.8	29.7	112.0	.0	18.0	68.4	351.5	513.5
EDUCATION	30.0	49.0	18.9	5.0	102.0	21.8	133.3	104.0	204.9	337.9
OIL, GAS & COAL	.0	5.0	26.1	27.0	56.0	.0	.0	.0	114.1	176.1
POWER	1.1	103.3	161.5	40.0	70.0	172.8	119.6	79.9	375.9	439.5
NON-FUEL MINERALS	.0	60.0	.0	.0	50.0	131.0	.0	.0	110.0	95.0
DFC B/	27.0	.0	.0	5.0	2.0	.0	17.0	103.2	34.0	117.0
INDUSTRY C/	14.2	.0	.0	5.0	52.0	.0	.0	27.9	71.2	130.0
TRANSPORTATION	168.1	214.0	229.6	221.1	210.0	151.3	343.4	622.8	1042.8	986.7
TELECOMMUNICATIONS	.0	.0	.0	14.0	15.0	.0	15.2	53.2	29.0	64.0
PROGRAM LENDING & SAL	.0	.0	60.0	8.0	.0	.0	80.0	.0	68.0	68.0
OTHER D/	2.2	5.5	66.6	15.1	.0	.0	.0	18.7	89.4	86.7
TOTAL REG 3	556.3	731.6	941.4	936.4	1207.0	494.9	887.5	2057.6	4372.7	5761.8

A/ INCLUDES SMALL SCALE ENTERPRISES AND SMALL SCALE INDUSTRY.
B/ EXCLUDES LENDING FOR SMALL SCALE ENTERPRISES.
C/ EXCLUDES SMALL SCALE INDUSTRY, MINING AND COAL PRODUCTION; INCLUDES TOURISM LENDING THROUGH FY79.
D/ MULTISECTORAL TECHNICAL ASSISTANCE LOANS AND CREDITS.

II.C. LENDING BY COUNTRY - WESTERN AFRICA REGION

COUNTRY	1979 GNP PER CAPITA	1979 POPULATION (MILLION)		AVERAGE ANNUAL LENDING FY78-80 $ MILLION	LENDING PER CAPITA FY78-80 ANN. AV. (US$)	LENDING PER CAPITA FY81-83 ANN. AV. (US$)
NIGERIA	670	82.503	IBRD	186.1	2.26	4.53
			IDA	.0	.00	.00
CAMEROON	560	8.248	IBRD	51.0	6.19	12.77
			IDA	34.5	4.18	2.73
IVORY COAST	1060	8.076	IBRD	68.9	8.54	14.10
			IDA	.0	.00	.00
UPPER VOLTA	180	5.703	IBRD	.0	.00	.00
			IDA	17.5	3.06	8.60
SENEGAL	430	5.525	IBRD	9.3	1.69	6.12
			IDA	31.0	5.62	5.29
GHANA	400	11.327	IBRD	.0	.00	.00
			IDA	24.5	2.16	5.49
MALI	140	6.469	IBRD	.0	.00	.00
			IDA	18.0	2.78	4.33
GUINEA	270	5.269	IBRD	.0	.00	3.16
			IDA	15.0	2.85	5.00
NIGER	270	5.155	IBRD	.0	.00	.00
			IDA	27.7	5.38	6.47
BENIN	250	3.427	IBRD	.0	.00	.00
			IDA	13.1	3.82	6.74
SIER. LEONE	250	3.383	IBRD	.0	.00	.00
			IDA	3.6	1.05	5.91
MAURITANIA	320	1.589	IBRD	20.0	12.59	.00
			IDA	2.7	1.68	8.45
TOGO	340	2.494	IBRD	.0	.00	.00
			IDA	15.7	6.28	4.54
LIBERIA	500	1.802	IBRD	17.8	9.90	11.10
			IDA	6.7	3.70	4.07
CONGO	630	1.498	IBRD	.0	.00	.00
			IDA	11.7	7.79	4.45
C.A.R.	290	1.954	IBRD	.0	.00	.00
			IDA	6.0	3.07	3.99
GAMBIA	260	.586	IBRD	.0	.00	.00
			IDA	4.5	7.68	9.10
GUI. BISSAU	200 a/	.779	IBRD	.0	.00	.00
			IDA	3.0	3.85	8.90
EQ. GUINEA	310 b/	.354	IBRD	.0	.00	.00
			IDA	.0	.00	6.59
CAPE VERDE	160 a/	.319 a/	IBRD	.0	.00	.00
			IDA	.0	.00	10.45
CHAD	110	4.416	IBRD	.0	.00	.00
			IDA	9.8	2.21	1.51
W. AFR. REG		.	IBRD	.0	.	.
			IDA	1.0	.	.
WESTERN AFRICA	538	160.876	IBRD	353.2	2.20	4.12
			IDA	245.8	1.53	2.27

a/ 1978 figures.
b/ 1976 figures.

II.D Country Distribution by Program Divisions - Western Africa Region

I. Country Programs Department I

Division :	IA	IB	IC
	Nigeria	Ghana	Mali
		Liberia	Niger
		Sierra Leone	Upper Volta

II. Country Programs Department II

Division :	2A	2B	2C
	Ivory Coast	Cameroon	Senegal
	Togo	Central African Rep.	Gambia
	Benin	Chad	Guinea
	Cape Verde	Congo	Mauritania
	Guinea-Bissau	Equatorial-Guinea	
		Gabon	
		Sao Tome and Principe	

WAN April 9, 1981

II. E. Economic and Sector Work Program - Western Africa Region

Functional Classification of Economic and Sector Reports 1/, FY80-82

(in staffweeks)

	FY80 (Actual)	FY81 (Estimate)	FY82 2/ (Budget)	No. of Reports in Period Completed	In Process
Economic					
I. Basic Economic Reports	96	40	-	-	1
II. Country Economic Memoranda	150	330	298	5	10
III. Special Economic Reports					
Poverty, Employment, Income Distribution and Basic Needs	49	74	39	5	2
Resource Mobilization and Allocation	110	22	94	11	1
International Trade and Finance	8	54	32	1	2
External Debt and Creditworthiness	47	16	12	5	1
Development Planning	44	188	99	3	4
Public Enterprises	33	-	111	3	-
Development Administration	70	42	21	2	3
Other	71	131	28	12	6
Total	678	897	734	47	30
Sector					
I. Rural Development and Agriculture	64	150	281	2	13
II. Industry (except small scale)	79	52	98	2	3
III. Small Scale Industries	-	-	-	-	-
IV. Energy and Power	41	92	131	1	7
V. Urban and Regional Development	5	4	60	-	1
VI. Population, Health and Nutrition	1	-	62	1	-
VII. Water Supply and Sewerage	63	120	65	2	6
VIII. Education	69	18	105	5	4
IX. Telecommunications	5	4	7	2	-
X. Transportation	77	47	129	13	6
XI. Other	15	8	43	2	2
Total	419	495	981	30	42

1/ Includes COPD managed.

2/ Based on 40 manyears Budget

March 20, 1981

II. F. Budget by Major Function - Western Africa

	Staff Year Applications		
	FY79 Actual	FY80 Actual	FY81 Program
1. Lending	86.1	91.1	91.2
2. Supervision	48.3	52.7	56.0
3. Economic & Sector	31.9	37.8	34.5
4. Other Direct Output	12.8	8.9	10.0
5. Support to other units1/	5.0	3.7	6.5
6. Management & Admin.	31.0	32.0	31.4
7. Overhead	45.4	45.5	46.3
8. Total	260.5	271.7	275.9
Memo: Admin. expenses ($000)	13004	15706	16965

1/ To COPDs, other regions, DPS, etc. IFAD

	Staff Year Sources		
	FY79 Actual	FY80 Actual	FY81 Program
1. Professional Staff1/	225.9	224.3	233.0
2. Consultants	17.6	19.8	17.6
3. Cooperative Programs	6.4	13.2	12.9
4. CPS	5.0	4.6	3.9
5. DPS	1.2	2.2	2.1
6. Other	5.1	7.1	5.4
7. Total	261.2	271.2	274.9
Memo: Authorized positions			
Professional	213	215	218
Assistant	17	18	22
Secretarial +	110	111	114
Total	340	344	354

1/ Including overtime.

II. G. PROFESSIONAL STAFF BY DISCIPLINE & GRADE

WESTERN AFRICA REGION

CATEGORY	AUTHORIZED POSITIONS
Management	12
Administrative Officers	4
Loan Officers & Op. Officers	40
Economists	67
Technical Specialists	67
Financial Analysts	22
Specialized Dep. Staff	6
Total	218 a/

STAFF BY GRADE LEVEL

GRADE	STAFF ON BOARD
Q	1
P	3
O	6
N	22
M	58
L	110
K	17
J	1
	218 a/

a/ As of end March 1981.