

RESEARCH
REPORT
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WEST AFRICA

STUDY REPORT ON **TRENDS, STRUCTURAL REFORMS** AND INTERCONTINENTAL TRADE DYNAMICS: THE CASE OF SIERRA LEONE'S APPROACH TO THE IMPLEMENTATION OF THE AFCFTA.



TRENDS, STRUCTURAL REFORMS AND INTER-CONTINENTAL TRADE DYNAMICS: THE CASE OF SIERRA LEONE'S APPROACH TO THE IMPLEMENTATION OF THE AFCFTA.



COMMISSIONED BY

Good Governance Africa
West-Africa Centre
The Paragon, 3rd Floor Master Bannor Street / 9th Lane, Osu
Behind the Trust Hospital, Osu-Accra

PREPARED BY

Jones A. Frimpong
RoyaleSphere Consult Services

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Executive Director
Operations Manager
Research Coordinator
Project Officer

Tina Serwaa Asante-Apeatu
Gifty Adjei-Kumi
Edward Teye Sarpong
Akosua Sapaning

Contributors to this Publication

RoyaleSphere Consult Services Ltd.

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"Good Governance Africa – West Africa"

The Paragon, 3rd Floor Master Bannor Street / 9th Lane, Osu

Behind the Trust Hospital, Osu-Accra

Email: info.westafrica@gga.org

Telephone: +233-302-777762

Facebook: <http://www.facebook.com/ggawestafrica>, website: www.gga.org

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List of Acronyms

AfCFTA	African Continental Free Trade Area
AGOA	African Growth and Opportunity Act
AMU	Arab Maghreb Union
AU	African Union
AUC	African Union Commission
C4C	Coalition for Change
CEN-SAD	Economic Community of Sahel-Saharan States
COMESA	Common Market of Eastern and Southern Africa
COVID-19	Corona Virus Disease
EAC	East African Community
ECCAS	Economic Community of Central African States
ECOWAS	Economic Community of West African States
EIF	Enhanced Integrated Framework
EU	European Union
FDIs	Foreign Direct Investments
FGDs	Focus Group Discussions
GATT	General Agreement on Trade and Tariffs
GDP	Gross domestic product
GIZ	German development agency
HIV/AIDS	Human Immuno Virus/Acquired Immuno Deficiency Syndrome
IGAD	Inter-governmental Agency for Development
IGC	International Growth Centre
ITC	International Trade Centre
JSS	Junior Secondary School
LDCs	Least Developed Countries
NEDS	National Export Development Strategy
NGC	National Grand Coalition

List of Acronyms

RECs	Regional Economic Communities
SADC	South African Development Community
SSS	Senior Secondary School
UN	United Nation
UNCTAD	United Nation Conference on Trade and Development
UNDP	United Nations Development Programme
UNECA	United Nations Economic Commission for Africa
WBG	World Bank Group
WTO	World Trade Organization

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Foreword

The implementation of the African Continental Free Trade Area (AfCFTA) Agreement which has been touted as the economic game changer for the continent is as good as the preparedness of the individual countries participating in the trade pact. As have been stated by most researchers and economic commentators on the success of arguably the largest trade bloc in the world (in terms of the number of participating countries), the individual trading capacities of the countries will largely determine the level of benefits the countries may receive. It is therefore a matter of utmost concern for the participating countries to put their “homes to together” as it were in terms of their a. capacity to produce locally for export; b. ability to develop policy and strategic trade guidelines to ensure the protection of the country’s interests; c. ability to build, maintain and expand needed infrastructure to support industries, businesses and other trade institutions to deliver on their mandate in real time; d. success in securing critical resource support including financial resources to facilitate growth in business, manufacturing, industry and for export; and effectiveness in removing intra and extra trade blocks such as border restrictions, clearing delays, etc.

Due to the exciting economic potential of the AfCFTA to ensure economic vibrancy on the continent of Africa through the removal of trade barriers hitherto limiting trading between member states, it is important that the individual trade dynamics of countries is reviewed. Such a review is to support national, regional and continental discourses about trade to shape policy and improve upon both in-country incomes and continental economic performance. The Sierra Leonian trade dynamics as reviewed in this report further justifies why it is critical to conduct individual country assessment to inform the championing of immediate reforms to support par-

Foreword

icipating countries under the AfCFTA trade pact. It appears from this review more clearly that the production and trade strength of some of the countries already signed onto the Agreement such as Sierra Leone may have a rather low intra-trade competing capacity in comparison with their peers. The heavily dependent economy of Sierra Leone on the extractive sector may not be diversified enough to support the country to rake in the full benefits from the AfCFTA if initiatives aimed at improving production from potential sectors such as agriculture are not doubled up.

The limitation posed by the over reliance of the Sierra Leonian economy on the extractive sector has over the years not helped in improving the productive capacities of other equally endowed sectors such as agriculture. With large tracts of arable land suitable for the cultivation varied crops all year round, the country could have been one of the giants in food crop exports. Review of available information on the country also showed the lack of sustainable support to the small and medium sized enterprises (SMEs) particularly in accessing funding. Infrastructure deficit in production due to years of non-prioritization and investment coupled with years economic down-turns due to civil war and the Ebola outbreak also weakened the economic strength of the country even further. Policy gaps in the trade sector in Sierra Leone and insti-

tutional weaknesses need immediate redress to ensure the country is well positioned to actively participate in the Agreement and reap its full benefits.

Initial efforts such as the development of the Trade and Investment Strategy by the Sierra Leonian Government and support from the regional body of the Economic Community of West African States (ECOWAS) in partnering the UNDP in launching a training of trainers programme for participants in the region which took place in Freetown, Sierra Leone, are all welcoming. More however, needs to be done to ensure the country get all trade fundamentals right to support a robust production and manufacturing sector alongside other export potential sectors. Though it must be put on record that the research team for this report encountered serious limitation in terms of data availability on trade in Sierra Leone, the GGA-WARO is convinced that the revelations in the report will give good insights into where the country stands in ensuring the approval of the AfCFTA Agreement by its Parliament on the 7th November 2018, ensures to the benefit of its citizens.



Tina Serwaa Asante-Apeatu (Mrs.)
EXECUTIVE DIRECTOR

Executive Summary

This study is the second in the series of the initial gathering of data and information on the implementation of the African Continental Free Trade Agreement (AfCFTA) across selected West African countries. The first study assessed the preparedness of local businesses in Ghana to participate in the implementation of the AfCFTA in Ghana and focused largely on the context of the AfCFTA and other trade agreements in Ghana, context of trade in Ghana pre-AfCFTA, trade policy environment in Ghana, readiness of local businesses to harness the benefits of the AfCFTA and the key policy implications. This report follows in a similar course, providing evidence on the trends, structural reforms and intercontinental trade dynamics in the implementation process and approach of the AfCFTA in Sierra Leone. The findings from this assessment provides the base for establishing the key policy entry points needing critical analysis, further research and advocacy to help improve the processes for full actualization of the objectives of the continental agreement in Sierra Leone.

The African Continental Free Trade Area (AfCFTA) is a creation of the African Union with the aim of harmonising existing regional trade agreements of eight Regional Economic Communities (RECs) recognised by the African Union (AU). The operational phase of the AfCFTA was launched during the 12th Extraordinary Session of the Assembly on the AfCFTA in Niamey in July 2019 and trading under the AfCFTA Agreement was due to start on the 1st of July, 2020. This was however, delayed as a result of the COVID-19 global pandemic and officially commenced in January of 2021 and is still at the early/initial stages of implementation. The Agreement establishes a free trade area across the African continent to promote trade and manufacturing with the rippling effect of contributing to the reduction in the number of people living in extreme poverty by 30 million

people and people living in moderate poverty by 68 million by the year 2035.

Study objectives

The general objective of the study was to assess the general trends, structural reforms and intercontinental trade dynamics, the case of Sierra Leone's approach to the Implementation of the AfCFTA. Specifically, the study sought to: Assess the trends and general trade reforms in Sierra Leone towards the implementation of the AfCFTA; Assess the level/status of implementation of the AfCFTA in Sierra Leone; Assess the readiness/preparedness of business in Sierra Leone in taking advantage of the AfCFTA; and to make recommendations based on findings to inform implementation processes and structures.

Methodology

This study adopted the extensive and systematic desk review approach in identifying and assessing relevant peer-reviewed papers, global, regional and national level reports and related documents on the African Continental Free Trade Agreement and on trade in general. The team carried out an extensive review of all available programme documents, policies, Acts and other relevant documents. Other similar international trade reports on best practices were also reviewed to situate this study within internationally accepted contexts. Findings from the desk/document review served as the base for the drafting of this report.

Study Limitation

In writing the report, a number of limitations came to bear - which may have limited the robustness of the study report. These comprised difficulty in accessing AfCFTA implementation documents in Sierra Leone – the team made efforts to get access to AfCFTA implementation documents from the Ministry of Trade and Industry, Sierra Leone. However, this was not successful after

several attempts. In lieu of this, the team had to rely solely on very limited and scanty online information for this report; Non-existent published and unpublished works on Sierra Leone's implementation of the AfCFTA – the team also thoroughly searched for literature on all scholarly sites for published works and also for unpublished documents and reports. However, this was non-existent. Secondly, the website of the Ministry of Trade and Industry was not functional to provide some level of information on the implementation of the AfCFTA. These deprived the study of concrete evidence. Despite these obvious limitations, frantic efforts were made at gleaning the highest level of available data/information which will enrich the AfCFTA implementation processes in Sierra Leone.

Study Findings:

The findings show that the implementation of the AfCFTA in Sierra Leone officially commenced in January, though not much has been achieved since. The Parliament of Sierra Leone on the 7th of November 2018 debated and ratified with unanimity the African Continental Free Trade Area (AfCFTA) Agreement, aimed at promoting trade liberalization in Africa. The parliamentary discussions centred on the benefits the country stood to gain in ratifying and fully participating in the implementation of the Agreement.

The findings further show that there is currently no evidence of implementation structures at any level, neither is there evidence of development of policy frameworks, strategic and implementation plans. This leaves a huge gap in the implementation process.

Level of Implementation of the AfCFTA

- Development of Trade and Investment Strategy

The findings show Sierra Leone is currently developing a trade and investment strategy in response to the call to get the country to be in readiness for the intra-Africa trade under the AfCFTA. The Strategy Document will guide the internal implementation of the AfCFTA. The trade and investment strategy being developed by the country could therefore focus on critical review of the trade potentials of the

country and with special attention on the prioritisation of areas that the country invest and build capacities to shore up exports from the country.

- **Capacity Building Initiatives/Programmes**

As part of the preparatory activities in readying the business community to take full advantage of the AfCFTA, a number of capacity building programmes have been rolled out. These comprised the ECOWAS and UNDP collaborative Capacity Building Programme for women. This was the first in the series of capacity building programmes under the theme 'Maximizing Opportunities in The AfCFTA' For SME Producers and Traders'. On the 7th of April, 2021, UNDP and the Economic Community of West African States (ECOWAS) Commission launched a Training of Trainers programme for participants in the ECOWAS region in Freetown, Sierra Leone for the eventual strengthening of the capacities of women small and medium enterprise traders and producers in the region to better harness the opportunities and benefits presented by the AfCFTA open market agreement.

Discussions and deliberations centred on the opportunities presented by the AfCFTA across the different sectors of the economy, especially for women and the youth, issues of quality and standards for export products and so forth.

Preparedness of local businesses to take advantage of the AfCFTA
The findings in relation to the readiness/preparedness of businesses in Sierra Leone to take advantage of the AfCFTA showed there is currently no evidence whatsoever to this effect. Efforts made at accessing evidence from the Ministry of Trade and Industry was not successful. It is therefore extremely important that research surveys be conducted to assess how prepared the business community in Sierra Leone is in taking advantage of the many benefits presented by the AfCFTA Agreement.

The Gap Analysis / Implementation Challenges

Full implementation of the Agreement will not be free of challenges. Implementation of the Agreement is likely to face various challenges given the nature and extent of policy and institutional changes, infrastructure development and resources required for effective implementation. These comprise the following:

- **Challenges Facing Small- and Medium-size Enterprises (SMEs)**

Funding and access to funding has been the bane of most companies in across the developing world including Sierra Leone. A study conducted by the World Bank in 2017 about the challenges faced by SMEs in Sierra Leone showed that SMEs rank access to finance as the foremost binding constraint to competitiveness, with 65.1 percent of respondents citing access to finance as a major impediment in Sierra Leone compared to the 38.3 percent Sub-Saharan average. Accessing affordable finance is a major impediment to the growth of private sector companies and is expected to be a major challenge to the competitiveness of local businesses in Sierra Leone.

Policy Gaps

Empirical evidences have shown that there are positive gains in joining the AfCFTA. However, the benefits to be derived from the Agreement depends on (a) having a national strategy (b) the design of the strategy (c) how fast the national strategy is developed and (d) the implementation of the national strategy. Currently, there is no evidence of any policy documents developed to guide the implementation of AfCFTA in Sierra Leone.

The Data Gap

Review of detailed literature including reports and published articles largely shows limited data on the implementation of the AfCFTA in Sierra Leone. The study could not find any data related to: Policy framework to guide the implementation; public/private partnerships relating to the implementation of the AfCFTA; information on the number of firms that are working to take advantage of the AfCFTA.

Lessons Learned

Based on the extensive desk review, a number of key lessons were learned to guide implementation of the AfCFTA in Sierra Leone. These comprises the following:

- **The benefits that come with the full implementation of the AfCFTA** to the general economic growth and development of Sierra Leone is well documented. However, achieving these benefits requires the enactment of proper legislation, policy documents and sustained support and strengthening of the business community and improvement in financing arrangements. This calls for a more coordinated approach among all key stakeholders with the Ministry of Trade and Industry taking the lead role.
- **The organisation of the Trainers of Trainers capacity building** in Sierra Leone provided the opportunity for the business community to be trained on all the AfCFTA protocols. This requires trickling down arrangements to ensure that the training is cascaded to all levels of the business community in the country – to better strengthen the SME community to take full advantage of the benefits presented by the AfCFTA agreement.

Policy Recommendations

Based on the findings and the lessons learned from the study, a number of key policy recommendations have been made to guide ongoing implementation processes in Sierra Leone:

- **Need for the development of a implementation policies and structures to operationalise the AfCFTA Implementation**

Evidence from the review of available documents/literature shows that there is no specific policy direction for the implementation of the AfCFTA in Sierra Leone to give direction to the implementation of the AfCFTA. There is also no evidence of implementation structures in the country. Secondly, operationalising the policy framework requires the need to develop a strategic plan for the implementation of the AfCFTA in the country. The absence of such basic structures leaves a very huge gap in the implementation process---leaving a major gap in implementation direction.

In line with this, the following recommendations are made:

- The Ministry of Trade and Industry should work at leading the process to develop national AfCFTA Policy Framework with an accompanying implementation plan to guide the implementation process in Sierra Leone.
- The Ministry should also lead the process in establishing implementation structures including a steering committee etc to coordinate the implementation of all aspects of the AfCFTA.
- Need to conduct comprehensive primary research on the AfCFTA implementation in Sierra Leone:

The review showed very scanty and limited evidence in relation to information on Sierra Leone's implementation of the AfCFTA. In the face of this limitation, comprehensive primary research employing mixed method approach (quantitative and qualitative) would have enriched the study. In lieu of this, it is recommended that primary research comprising key informant interviews, FGDs and a survey with the private sector groups and individuals, government officials responsible for the implementation of the AfCFTA, officials from the Ministry of Trade and Industry, and all other identifiable groups and individuals.

- **Need to strengthen stakeholder consultations**

The results of the desk review study shows that so far, only one national level 'trainers of trainers' capacity building workshop has been conducted since January, 2021. Though this is laudable, the evidence from the study shows no other regional or local level capacity building programmes have been done. This calls for decentralized training and capacity building programmes to be organised especially for the business community – including women and youth.

- **Financial Strategies for Businesses**

Access to flexible financial resources has largely been the bane of most businesses in Africa including Sierra Leone, especially SMEs. Though the financial system in the country is relatively stable, a conscious effort should be made at reducing interest rates on lending to make the local industries much more competitive.

- Need to conduct cross-country research on status of implementation of the AfCFTA

The desk study showed non-existent data/information on the status of implementation across all the countries that have signed up to the AfCFTA. This could pose a major challenge to tracking the gains made. In line with this, it is recommended that a cross-country study be conducted after the first year of implementation to measure progress of implementation.



10th Extraordinary Session of the Assembly on AfCFTA, Kigali Rwanda
source: au.int

Chapter 1

BACKGROUND CONTEXT

1.0 Context / Introduction

This study is the second in the series of the initial gathering of data and information on the implementation of the African Continental Free Trade Agreement (AfCFTA) across selected West African countries. The first study assessed the preparedness of local businesses in Ghana to participate in the implementation of the AfCFTA in Ghana and focused largely on the context of the AfCFTA and other trade agreements in Ghana, context of trade in Ghana pre-AfCFTA, trade policy environment in Ghana, readiness of local businesses to harness the benefits of the AfCFTA and the key policy implications. This report follows in a similar course, providing evidence on the trends, structural reforms and intercontinental trade dynamics in the implementation process and approach of the AfCFTA in Sierra Leone. The findings from this assessment provides the base for establishing the key policy entry points needing critical analysis, further research and advocacy to help improve the processes for full actualization of the objectives of the continental agreement in Sierra Leone.

1.1 Background to the AfCFTA

The African Continental Free Trade Area (AfCFTA) is a creation of the African Union with the aim of harmonising existing regional trade agreements of eight Regional Economic Communities (RECs) recognised by the African Union (AU) namely the Arab Maghreb Union (AMU), the Common Market of Eastern and Southern Africa (COMESA), the Economic Community of West African States (ECOWAS), the Economic Community of Central African States (ECCAS), the South African Development Community (SADC), the Inter-governmental Agency for Development (IGAD), the Economic Community of Sahel-Saharan States (CEN-SAD) and the East African Community (EAC) to create an African Economic Union (Marinov, E. 2014). The

operational phase of the AfCFTA was launched during the 12th Extraordinary Session of the Assembly on the AfCFTA in Niamey in July 2019 and trading under the AfCFTA Agreement was due to start on the 1st of July, 2020. This was however, delayed as a result of the COVID-19 global pandemic and officially commenced in January of 2021 and is still at the early/initial stages of implementation, having being rolled out a little over 10-months across the African continent. The Agreement establishes a free trade area across the African continent to promote trade and manufacturing with the rippling ef-



AfCFTA Secretariat, Accra
source: gna.org.gh

fect of contributing to the reduction in the number of people living in extreme poverty by 30 million people and people living in moderate poverty by 68 million by the year 2035. Currently, 54 of the 55 African Union Member States have signed onto the agreement with 40 of the countries depositing their instruments of ratification, confirming them as State Parties to the agreement (African Union Commission (AUC) – 2021).

The agreement is expected to increase intra-African trade by eliminating tariff and non-tariff barriers to the trade of goods and services and is projected to boost intra-African trade by US\$34.6bn (52.3 percent) to the baseline in 2022. Industrial exports from Africa is also expected to increase above the threshold by 4.7 percent (or US\$21.1bn) in the same period whilst intra-African trade in agricultural and food products would grow by an additional 7.2 percent (or US\$3.8bn) in 2022 beyond the threshold. Meanwhile, imports of African countries from the rest of the world would decrease by US\$10.20bn by the said period (United Nations Economic Commission for Africa (UNECA) (2012). The gradual reduction in trade barriers as a result of institutions such as the General Agreement on Trade and Tariffs (GATT) and World Trade Organization (WTO) has led to increased trade in the latter part of the 20th Century particularly that of manufactured products and the promise of new opportunities to countries that participated and the AfCFTA is expected to follow in a similar pathway. The agreement is specifically expected to lead to:

- *an increase in real income by US\$450 billion;*
- *increase the volume of total exports by 29%;*
- *increase intracontinental exports by more than 81% and exports outside the African continent by 19%;*
- *increase employment opportunities and wages for both skilled and unskilled workers.*

These gains are largely expected to be driven by the manufacturing, agricultural sectors and from trade in services and are to be achieved by the year 2035 (African Union Commission (AUC) – 2021). The AfCFTA which comes across as the continent's most ambitious integration initiative (Tralac, 2019) covers three core objectives

comprising the following:

1. Create a single continental market for goods and services, with free movement of business persons and investments;
2. Expand intra-Africa trade across the regional economic communities and the continent in general;
3. Enhance competitiveness and support economic transformation.

Components of the AfCFTA:

The Agreement comprises of Protocols on Trade in Goods; Protocol on Trade in Services; and Protocol on Rules and Procedures on the Settlement of Disputes (Figure 1). In addition, The Protocol on Investment, Protocol on Intellectual Property Rights and Protocol on Competition will be formulated in subsequent phases of implementation. The AfCFTA offers greater access to a wider market, various business and partnership opportunities for economic growth within the African continent. Increased intra-African



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Currently, 54 of the 55 African Union Member States have signed onto the agreement

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trade is expected to promote competitiveness within the manufacturing sector and industries, spur infrastructure development and technology transfer across countries within the region.

The framework agreement establishing the African Continental Free Trade Area (AfCFTA) comprises 2-key phases. The first phase comprises negotiation of three protocols: Trade in Goods, Trade in Services, and Rules and Procedures for Settlement of Disputes. The agreement requires members to progressively remove tariffs on at least 97 percent of tariff lines that account for 90 percent of intra-Africa imports. The average tariff rates in Africa are around 6.1 percent, with high variation across countries and sectors within an intra-Africa trade that is highly concentrated. Thus, some of the most onerous and protectionist tariffs may be maintained even if countries liberalize most tariff lines. Trade in certain sensitive sectors is expected to be liberalized over a longer period, but other goods are likely to remain excluded from liberalization. Negotiations on services began in June 2018, with countries identifying five priority sectors: financial services, transport, telecom/information technology, professional services, and tourism. The benefits of services liberalization extend far beyond the service sectors themselves; they affect all other economic activities in which services are inputs. A second phase of negotiations will focus on investment, competition, and intellectual property rights, with the potential of deepening AfCFTA.

1.2 Objectives and scope of the current study

The general objective of the study is to assess the general trends, structural reforms and intercontinental trade dynamics, the case of Sierra Leone's approach to the Implementation of the AfCFTA. Specifically, the study sought to achieve the following:

1. Assess the trends and general trade reforms in Sierra Leone towards the implementation of the AfCFTA;
2. Assess the level/status of implementation of the AfCFTA in Sierra Leone;
3. Assess the readiness/preparedness of business in Sierra Leone in taking advantage of the AfCFTA;

4. Make recommendations based on findings from reported implementational challenges facing local businesses since implementation.

1.2.1 Research Questions

In adequately responding to the objectives of the study, the following research questions were formulated to guide the study:

1. *What have been the trends and general trade reforms in Sierra Leone towards the implementation of the AfCFTA?*
2. *What is the level/status of implementation of the AfCFTA in Sierra Leone?*
3. *What is the level of readiness/preparedness of business in Sierra Leone in taking advantage of the AfCFTA?*
4. *What are the recommendations based on findings from reported implementational challenges facing businesses in the implementation of the AfCFTA?*

1.3 Methodology

This study adopted the extensive and systematic desk review approach in identifying and assessing relevant peer-reviewed papers, global, regional and national level reports and related documents on the African Continental Free Trade Agreement and on trade in general (Figure 1). The team carried out an extensive review of all available programme documents, policies, Acts and other relevant documents. Other similar international trade reports on best practices were also reviewed to situate this study within internationally accepted contexts. Findings from the desk/document review served as the base for the drafting of this report.



Figure 1: Flow of work

1.3.1 Search Strategy:

The search was done by searching academic and scholarly sites/ databases including Google Scholar, Scopus, PubMed, Taylor and Francis, JStor, BMC, Science Direct, ResearchGate and Trade related Journals using the following key terms: "Africa" "Trade," "Trade Agreements," etc. Reports and papers in the trade and comics spaces were selected by reviewing their abstracts and title and also using accompanying references gotten from the list of references on the paper. The review focused on only studies and reports published in English. The study designs used in most of the studies and documents reviewed were in-depth document reviews, quick online surveys --- mostly quantitative and in some instances, mixed methods comprising both quantitative and qualitative methods.



H.E. Julius Maada Wonie - President of the Republic of Sierra Leon
source: wikipedia

The synthesis of available literature brings to the fore the level of preparedness of local businesses to take advantage of the AfCFTA and their responsiveness in meeting the tenets/protocols of the agreement. This analysis is extended to investigate the implications of AfCFTA gaps, success stories and the institutional structures put in place to oversee implementation.

1.3.2 Study Limitation

In writing the report, a number of limitations came to bear - which may have limited the robustness of the study report. These comprised the following:

- Difficulty of accessing AfCFTA implementation documents in Sierra Leone – the team made efforts to get access to AfCFTA implementation documents from the Ministry of Trade and Industry, Sierra Leone. However, this was not successful after several attempts. In lieu of this, the team had to rely solely on very limited and scanty online information for this report;
- Non-existent published and unpublished works on Sierra Leone's implementation of the AfCFTA – the team also thoroughly searched for literature on all scholarly sites for published works and also for unpublished documents and reports. However, this was non-existent. Secondly, the website of the Ministry of Trade and Industry was not functional to provide some level of information on the implementation of the AfCFTA. These deprived the study of concrete evidence.

Despite these obvious limitations, frantic efforts were made at gleaning the highest level of available data/information which will enrich the AfCFTA implementation processes in Sierra Leone.

Chapter 2

COUNTRY CONTEXT

2.0 Country/ Introduction

This chapter provides contextual country evidence on Sierra Leone with specific focus on demographic, social and economic indicators. These provide proper perspectives for situating the trade discussions and analysis.

2.1 Demographics - population dynamics

Sierra Leone's total population according to the 2015 population and housing census (the fifth modern census conducted since independence in 1963) was 7,092,113, a 42.5% increase since the last census in 2004. The current projected total population currently stands at about 8,170,550 based on a projected growth rate of about 2.1 (UN Population Division, 2020). The population of the country has almost doubled since the turn of the millennium from about 4.5 million in 2000 to 8.2 million in 2021 (Figure 2). These growth dynamics have implications for trade and business development.

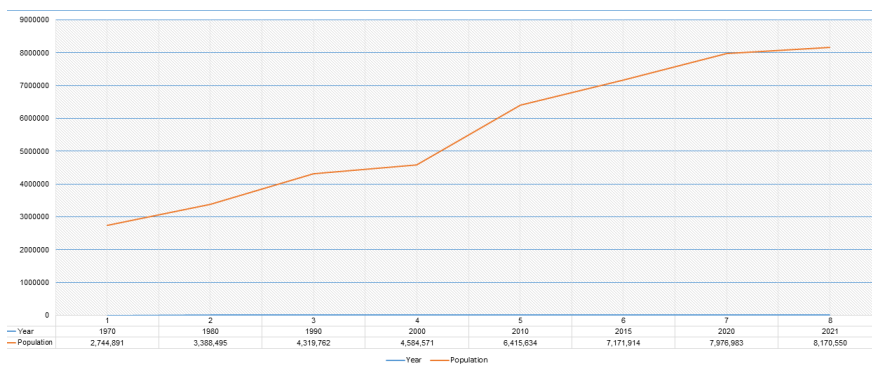


Figure 2: Population trends - 1970 - 2021

Source: World Population Prospects: The 2019 Revision - United Nations Population Division

2.1.1 Population Growth

Evidence from Figure 2 shows that Sierra Leone’s population has been on the increase since the first scientific census was conducted in 1963. The results between the last two censuses, shows that the population has increased from 4,976,871 (2004) to 7,092,113 (2015), representing an inter-censal percentage increase of 42.5%. The average annual growth rate between 2004 and 2015 is 3.2 percent, compared to 1.8 percent from 1985 to 2004 and 2.3 percent from 1974 to 1985. The relatively low growth rate from 1985 to 2004 (1.8%) could be attributed to the 11-year civil war.

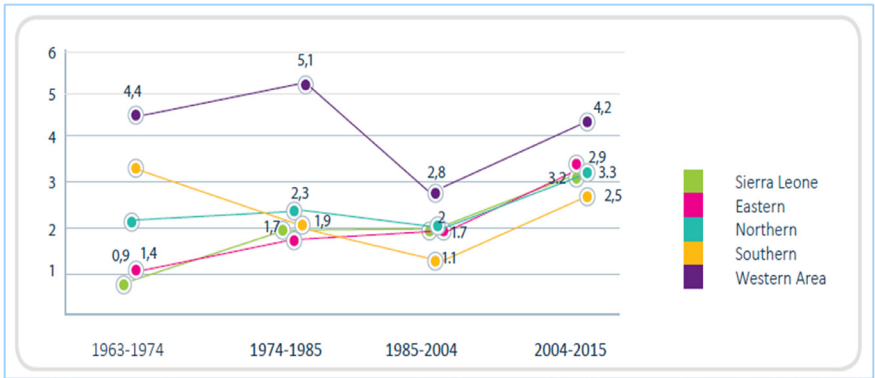


Figure 3: Inter-censal population growth rate

Source: Census report, 2015 – Statistics Sierra Leone

2.1.2 Age and Sex Structure

Population pyramid or age-sex pyramid generally represents the structure of population of a country/region on the basis of age and sex. This graphical representation provides a great deal of information about fertility, mortality and migration or population dynamics, which in-turn determines development planning priorities for the different age groups. The 2015 population and housing census results of Sierra Leone reflect the demographic profile of a young population, where 40.9 percent are less than 15 years, and only 3.5 percent are 65 years and above (Figure 4). The working age population (15-64 years) represents 55.6 percent. As expected in a country with high levels of fertility and mortality, the age-sex pyramid at national level has a relatively broad base. The first two age groups, 0-4 years and 5-9 years, account for 13.3 percent and 15.7 percent of the total population, respectively. The percentage share of the population by the various age groups decreased in succeeding years. The results depict more than 50 percent of the population of Sierra Leone are within the working group with its rippling effects on employment and unemployment.

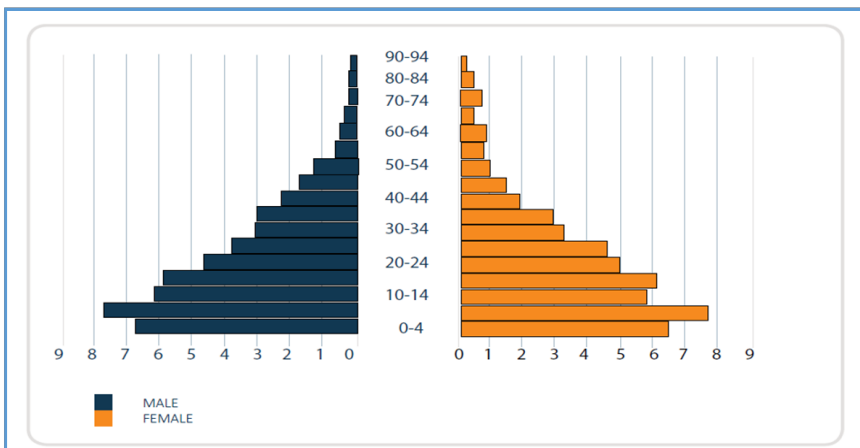


Figure 4: Age and Sex Structure

Source: Census report, 2015 – Statistics Sierra Leone

2.1.3 Total Fertility Rates

Total fertility is the mean number of children a woman would have by age 50 if she survived to age 50 and were subject, throughout her life, to the age-specific fertility rates observed in a given year. The total fertility is expressed as the number of children per woman (UN Population Division). Figure 5 shows that the current fertility in Sierra Leone stands at 4.3 per woman, indicating a significant reduction by about 2 percentage points since the turn of the millennium (2000) though still one of the highest TFR's in Africa. This is projected to further reduce to 4.0 per women in the next census as a result of the conscious fertility reduction initiatives including the contraceptive use drive.

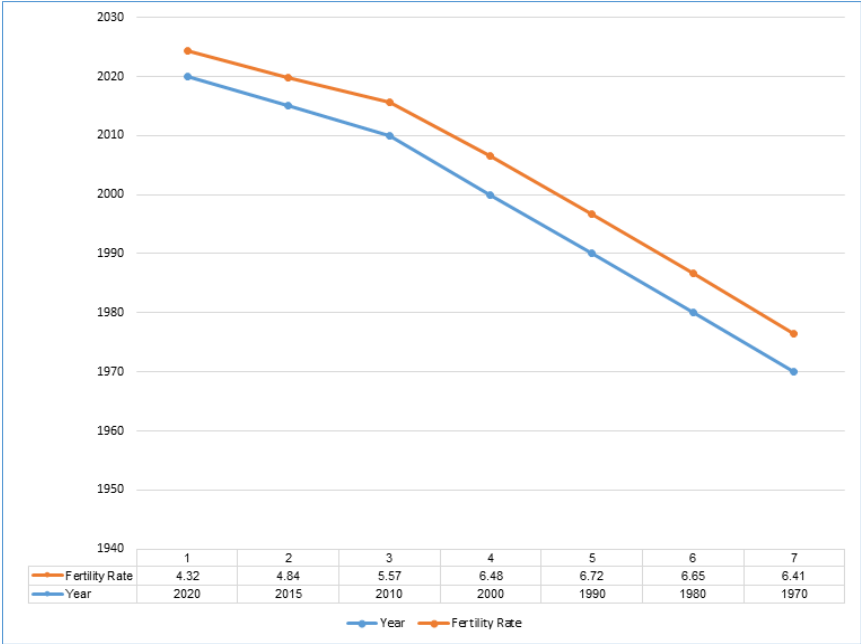


Figure 5: Total Fertility Rate - 1970 - 2020

Source: Census report, 2015 – Statistics Sierra Leone

2.1.4 Urbanization

Issues of urbanisation are seen to be an indicator of growth and development. The urbanisation trends in Sierra Leone as shown in Figure 6 indicates that the urban population of Sierra Leone made up just over 40 per cent (43.3%) of the national population. Insights from economics of geography suggest that greater urbanisation should lead to an increased level of trade – implying that urbanisation has a strong positive impact on exports of the modern sector. Consistent with model predictions, urbanisation is also associated with a decline in exports and increase in imports in the primary sector (World Economy, 2015). This means, the observed increasing trends in urbanisation in Sierra Leone when properly harnessed should lead to increase in trade and by extension, positively impact on the implementation of the AfCFTA.

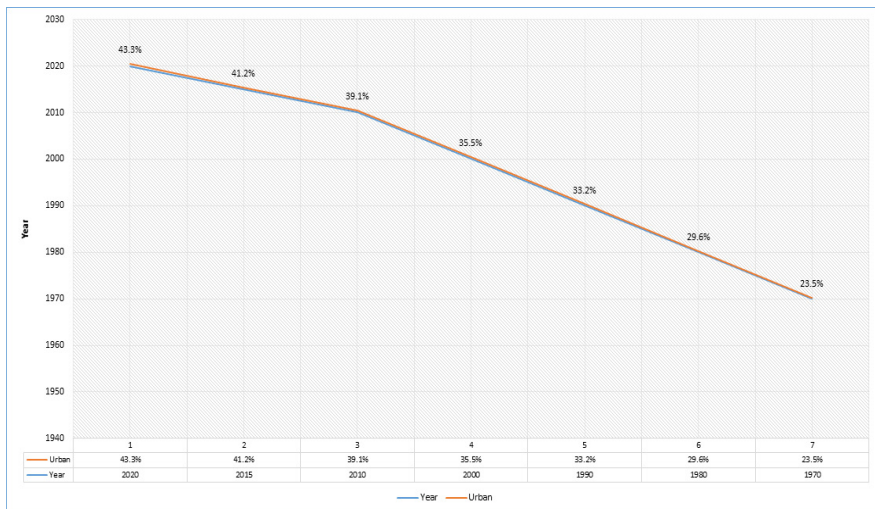


Figure 6: Urbanization trends: 1970 - 2020

Source: Migration and Urbanization Thematic Report, 2017)

2.2 Social Dynamics – education and health

Education:

2.2.1 Structure of the education system in Sierra Leone

Sierra Leone's education system is based on a 6-3-3-4 structure: six (6) years of primary education (classes 1–6), three (3) years of JSS (classes 7–9), three (3) years of Senior Secondary School (SSS, classes 10–12), and four (4) years of tertiary education. The 2015 Census findings indicated that 3.2 million people, comprising 45.8 per cent of the total population of the country, were aged 6–24 years. The school attendance status for persons aged 6 years and above revealed that 37.8 per cent of that population attended school in 2015, 20.3 per cent had left school prior to the 2015 Census, and about 42 per cent had never been to school.

Figure 7 shows that 3.2 million people aged 6-24 years were of school-going age, and constitute 45.8 per cent of the total population. Those that fell in primary school age group comprised 17.5 per cent of the total population, while the secondary school age population and postsecondary age, accounted for 14.0 per cent and 14.4 per cent respectively of the total population. The level of education of a population is known to be directly related to development and as such the high proportion of the working population with little or no education could have implications for the human resource requirements needed to achieve a robust trade growth through the AfCFTA in Sierra Leone.

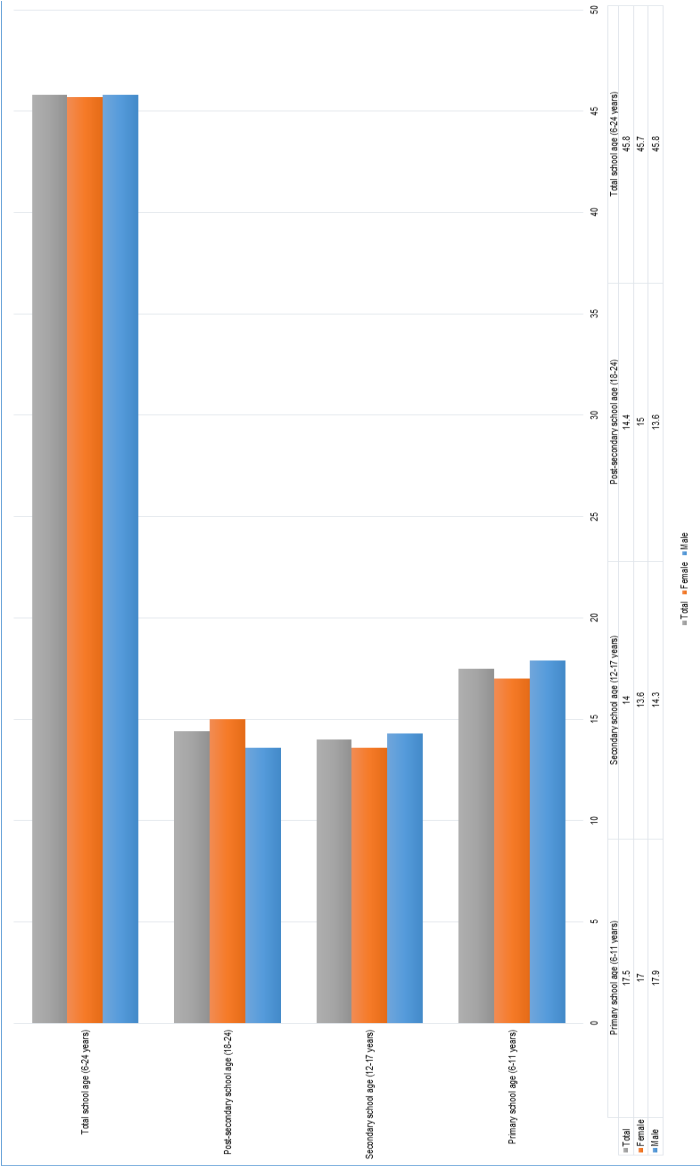


Figure 7: Composition of school-going age population

Source: Statistics Sierra Leone, 2015 Population and Housing Census

2.2.2 Education by Level

Figure 8 presents the distribution of enrolled pupils at all four levels of education in Sierra Leone. The data shows pre-school and SSS levels account for the least proportion of the school going age (14.3 per cent each). The distribution across school levels shows marked inequalities in terms of total numbers enrolled at each school level. The primary school level accounts for more than half (52.9 per cent) of all pupils enrolled at the four school levels. This is followed by the JSS level, accounting for almost one fifth (18.6 per cent).

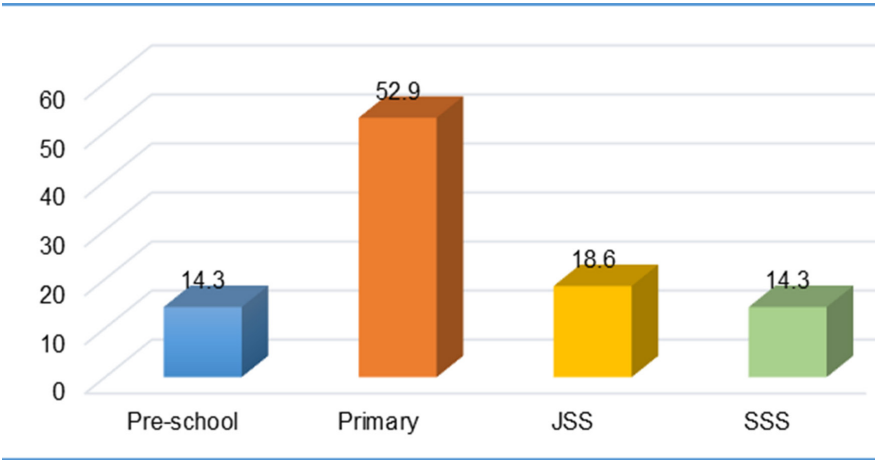


Figure 8: Education by level

Source: Statistics Sierra Leone, 2015 Population and Housing Census



The Leone
(the official national currency and used only in Sierra Leone)
source: gna.org.gh

2.2.3 School enrolment by sex and school level

Enrolment differences, in terms of sex, at each school level show a unique pattern for the primary school level as the only level with female dominance (50.8 per cent females and 49.2 per cent males) while male dominance is observed in all the other three levels of education. Figure 9 clearly shows the prevailing disparities in terms of sex in each of the four levels of education.

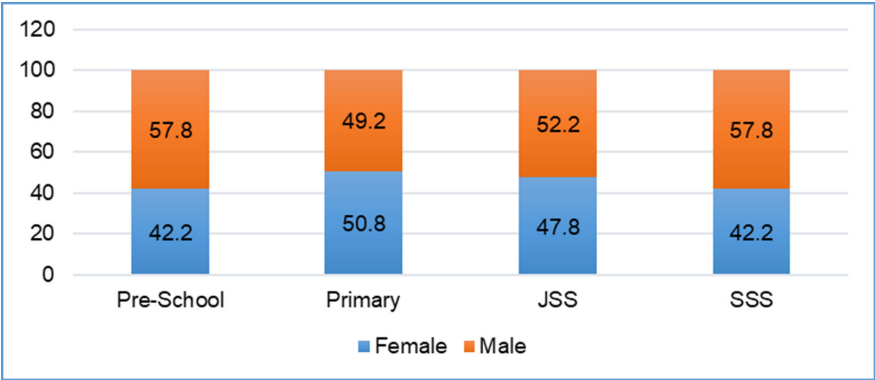


Figure 9: School enrolment by sex and school level

Source: Statistics Sierra Leone, 2015 Population and Housing Census

2.2.4 Education: Literacy and School Attendance

Nearly half (about 49 per cent) of the population aged 10 years and above are literate in any language, including English, French, and local languages (Figure 10). About 44.2 per cent are literate in English Language; 2.6 per cent are literate in a local language, 0.3 per cent are literate in French, and about 4.3 per cent are literate in other languages. Having almost about fifty percent (48.6%) of the population being illiterate could have serious implications for growth in trade since there is a direct link between educational levels and business growth and development.

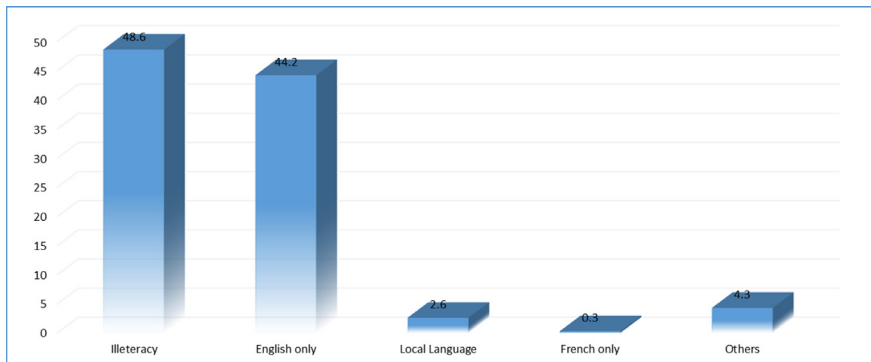


Figure 10: Literacy levels

Source: Statistics Sierra Leone, 2015 Population and Housing Census



An indigen of Sierra Leone receiving medical treatment
Source: [unicef.org](https://www.unicef.org)

Health:

2.2.5 Life expectancy

In terms of health, according to the UN Worldometer and World Bank data (2020), the life expectancy in Sierra Leone has risen from 54 to 55 years, with females living longer than men. The infant and under-5 mortality rates have also decreased from 80 to 70 and 110 to 90 percent, respectively. This data suggests that the country is quickly expanding. Nonetheless, the country is plagued by a lack of safe drinking water, and a high prevalence of HIV/AIDS, malaria, and yellow fever.

2.2.6 Access to toilet facilities

The data on access to toilet facilities shows nearly three-quarters of households in Sierra Leone use a pit latrine as a toilet facility, both in rural and urban areas (Table 1). The data also shows very few households use flush toilets - about 2 in 10 urban households and one in 10 in rural areas. Unsurprisingly, people in rural areas are significantly more likely to use bushes and rivers to dispose of human waste.

Table 1: Types of toilet facilities

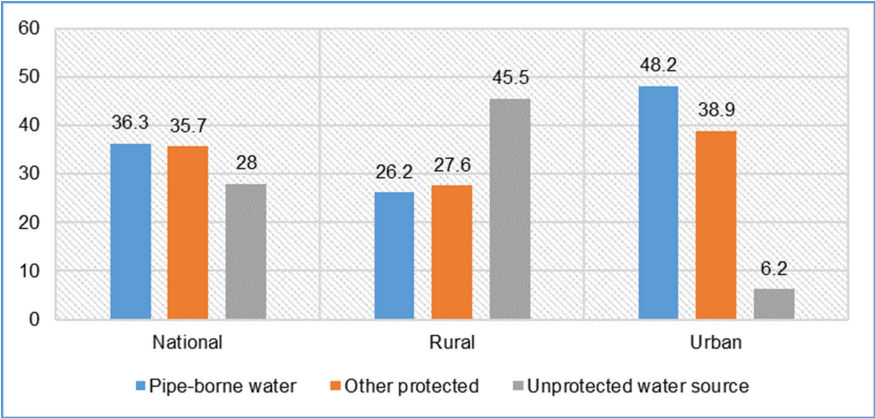
Toilet Facilities	National	Rural	Urban
Pit Latrine	73.9	73.5	74
Flushed	8.6	1.3	17.5
Communal Bush/River Bed	12.9	20.8	3.1
Ventilated improved pit	2.5	1.9	3.2
Other facilities (bucket, etc)	2.1	4.3	4.9

Source: Statistics Sierra Leone, 2015 Population and Housing Census

2.2.7 Access to drinking water

Urban dwellers have significantly greater access to water from pipes or protected sources (for example, boreholes) than rural areas and the national average for pipeborn water is just over a third (Figure 11). There is again a sharp contrast in the use of unprotected water sources between rural and urban areas

Figure 11: Sources of drinking water



Source: Statistics Sierra Leone, 2015 Population and Housing Census

2.3 Economic Dynamics - main area of trade, employment levels, job types

In terms of economic dynamics, the country's GDP growth rate has been volatile, with a significant dip in 2015 and fluctuating statistics. The current GDP growth rate (2020) is -2 percent, or from 4.122 billion USD to 3.856 billion USD. Agriculture is the country's major source of income. It is also largely reliant on international trade. Agriculture accounts for 58% of the country's GDP with rice being the most often exported commodity.

2.3.1 Types of economic activities

The data in relation to types of economic activities shows more than 80 per cent of people in Sierra Leone (nationally) are self-employed – with more than 5 in 10 rural dwellers compared to about 3 in 10 people in towns and cities working for themselves (Table 2). Less than 1 in 10 people in both urban and residential areas are in paid employment. These outcomes could be due to a number of issues, such as low skills or low employment opportunities.

Table 2: Types of economic activities

Economic activity	National	Rural
Paid employee	2.23	9.69
Self-employed without employees	53.01	28.84
Self-employed	2.56	2.24
Unpaid family worker	4.41	0.97
Paid apprentice	0.18	0.52
Unpaid apprentice	0.68	0.89
Worked before but currently looking for work	0.16	0.80
Looking for work for the first time	0.93	3.21
Household work	6.53	7.23
Not working & not looking for work	3.62	5.28
Full time student	24.26	37.45
Retired/pensioner	0.28	0.79
Others	0.81	1.58
Total	100.00	

Source: Statistics Sierra Leone, 2015, Population and Housing Census

2.3.2 Economically active population

Analysis of available data on the active population in Sierra Leone shows that there has been about 50.18 percentage increase in the proportion of economically active population between 2004 and 2015. The data also indicates that unemployment increased from about 70,000 in 2004 to over 109,034 in 2015.

Table 3 indicates that about 39 per cent of the economically active population are youth in the age bracket of 15-24 years. This implies that government should design strategies to generate or create jobs that youths would be able to undertake. The total number of the employed (paid employment, self-employed without employees, self-employed with employees (employers), paid apprentices) stood at 2,448,684. The unemployed total is 109,034, which shows that the number of the unemployed has increased by 45,772 (a percentage increase of about 72 per cent over the eleven-year period 2004 to 2015).

“

The data in relation to types of economic activities shows more than 80 per cent of people in Sierra Leone (nationally) are self-employed

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Table 3: Economically active population 15-64 years

Age group	Economically active population			Economically inactive	Total working population	Percentage(%) Economically active		
	Employed	unemployed	Total (Labour force)			Employed	Unemployed	Total
15-19	241,103	12,252	253,355	617,993	871,348	10%	11%	22%
20-24	312,338	22,304	334,692	325,746	660,438	13%	20%	17%
25-29	409,501	25,803	435,304	170,317	605,621	17%	24%	15%
30-34	343,249	15,898	359,147	73,226	432,373	14%	15%	11%
35-39	351,632	12,050	363,682	55,803	419,485	14%	11%	11%
40-44	255,051	7,451	262,502	35,495	297,997	10%	7%	8%
45-49	207,695	5,584	213,279	28,083	241,362	8%	5%	6%
50-54	155,933	3,830	159,763	26,522	186,285	6%	4%	5%
55-59	89,009	2,172	91,181	19,019	110,200	10%	0%	3%
60-64	83,123	1,690	84,813	27,673	112,486	6%	0%	2%
TOTAL	2,448,684	109,034	2,557,718	1,379,877	3,937,595			100%*

Source: Statistics Sierra Leone, 2015, Population and Housing Census

Chapter 3

HISTORICAL TRADE DYNAMICS – THE SIERRA LEONE EXPERIENCE

3.0 Introduction

Sierra Leone has in terms of trade been consistent in approach over the years. The country has largely been dependent on its natural resources with little diversification of the economy pre- and post-independence. The relatively small economy of Sierra Leone has over the years been heavily dependent on the extractive industry with focus on diamond trade before and after independence. However, in recent years though the dependence on the extractives still permeates the country's trade area, trade in other mineral endowments such as iron ore, titanium ore and rutile have over taken the export of diamonds. The economy of Sierra Leone despite its mineral endowment continues to be largely agrarian with the agricultural sector contributing over 50% of the country's GDP whilst mineral exports remain the highest export commodity.

Trade challenges in the West African country are diverse in nature with the over a decade long internal war between 1991 and 2002 amongst one of the most impactful events that drowned the economic fortunes of the nation. After the war in 2002 however, the economy of Sierra Leone has shown some promising growth especially between the years 2012 to 2014. But the onset of the Ebola outbreak in 2014 further impacted the economic fortunes of the nation following years of instability in iron ore trade on the international market. Stable political atmosphere currently being enjoyed by the nation following five successful public elections that have seen power exchanged opposition parties on two occasions however, is giving all the positive signals that the country is ready for business amidst peace and security though there still exist some levels of agitations from opposition camps in relation to corruption and reported human rights abuses.

3.1 Pre-Independence Trade Dynamics and Trends

By the year 1945, the mining sector of Sierra Leone had become the backbone of the country's industrialization agenda. The country's leadership had strong belief in the mining potential of the nation following revelations from various studies by the country's geological survey departments showing large deposits of minerals especially iron ore. The director in charge of geological survey department is reported to have assured the country at independence in 1961 that:

"Sierra Leone will be an exporter of iron ore for many years to come. The diamond fields are so extensive that it is unlikely they will be out in the immediate future even at the present rate of exploitation. Several other mineral discoveries recorded by the Geological Society in recent years may become exploitable in the course of time, and hope is entertained that the regional geochemical prospecting surveys which are to be carried out over elected areas of Sierra Leone during the next four years may lead to the discovery of other mineral prospects" (Roberts, 1975).

Evidence shows that long before independence in 1961, Sierra Leone had established itself as a potential global player in the extractive sector owing to large deposits of mineral resources in the country. The challenges at the time however, had to do with reported illicit and wasteful mining of diamonds between 1953 and 1959 (Van der Laan, 1965). The period before independence was characterized by reported violence in diamond trade in the country which some referred to as the "blood diamond trade". Trade in diamonds has long been the main export commodity from Sierra Leone before independence and even after independence although after the country secured independence in 1961, several other minerals have been identified and exploited in addition to diamonds.



*Diamond (from Sierra Leone)
Source: CC BY-NC-ND*

3.2. Post-Independence Trade Dynamics and Trends

After independence, the Sierra Leonian economy was set on a path of growth following large discoveries of mineral resources and a strong agricultural sector with vast arable lands available for expansion and development. The country had a renowned educational system; a rich and diversified natural resource base comprising diamonds and other minerals; abundant agricultural and marine resources; tourist attractions; and a stable inclusive democracy.

The post-independence blues of Sierra Leone's remarkable economic growth and development came within the first decade after independence (1960 to 1969). The economy grew by an average of 4.0 percent during the first decade after independence. This growth was driven mainly by strong mining and agriculture production. A period characterised by low inflation rate and strong local currency

and stable exchange rate. A strong export growth fuelled by exports of mineral resources and agricultural produce, ensured that foreign reserves position was secure and comfortable. This period was followed by a period not so positive but with mixed economic performance. Thus, the period between 1970 and 1979 where strong economic fundamentals continued in the first half of the 1970s. However, some international trade dynamics such as slump in global oil prices, affected these positive economic trends. Despite the first oil price shock, the economy is reported to have grown by an average of 3.7 percent during this period. Inflationary pressures started but were manageable. Other economic factors such as the exchange rate was stable and foreign reserves position was comfortable (Bangura, 2014).

Trade and economic fortunes were reported to have started declining at the onset of the third decade after independence. That is during the period between 1980 to 1989 (the decade preceding the start of decade long internal war), Sierra Leone's economy declined sharply. The economy was characterised by severe macroeconomic instability including; declining per capita incomes, high inflation (180 percent in 1987), Low domestic revenue-5% of GDP in 1986; weak fiscal and current account positions.

3.3 Millennial Trade Dynamics and Trends

The economic growth and trade dynamics of Sierra after the war in 2002 have been a mixed one. On one hand, there have been promising signs of growth in two of the country's main sectors that contribute significantly to the country's gross domestic product (GDP) i.e. agriculture and mining. The International Growth Centre (IGC) reports significant economic stresses owing to externalities affecting the agricultural and mining sectors. The agricultural sector of the economy of the country is reported to contribute about 50% of its GDP whilst the mining sector remains the highest contributor of export earnings of over 60% (IGC 2021). Further reports suggest the outbreak of Ebola in 2014 coincided with the slump in mineral prices and a drastic decline in prospecting for oil. In 2015, the econ-

omy of Sierra Leone is reported to have virtually collapsed with a double-digit contraction in GDP growth. By 2018, GDP growth had recovered to 3.7 percent, largely driven by the agricultural and services sectors. The economy remains small, open, and largely undiversified (IGC 2021).

Exports from the extractive sector continue to hold a lot of economic promise for the economy of Sierra Leone following the resumption of minerals and oil prospecting. However, past incidence such as the government's trade war with some mining companies which resulted in the shutting down of their operations in the year 2013, has contributed significantly in a slump in foreign direct investments (FDIs). Again, the IGC reports in its country strategy notes on Sierra Leone and Liberia that "the wide fluctuations in GDP may explain the inability to attract investment that can further propel growth and create employment opportunities. From a high of US\$950million in 2011, FDI flows in 2016 dropped to US\$138million. Sierra Leone operated a negative trade balance in 2018, contributing to inflation which hovered around 18 percent. Additionally, there is a substantial fiscal deficit, though there are signs of improvement through increased domestic revenue mobilisation and better expenditure controls. Binding constraints to growth include infrastructure and energy deficits, high transactions costs and limited access to capital".

According to statistics from the World Bank Group, total exports in Sierra Leone increased to 18.6 percent of GDP in 2017 from 17.4 percent in 2016, attributable to the increase in agricultural and fisheries exports. Exports of minerals, such as iron ore, rutile, diamond, bauxite, and gold, accounted for 70.8 percent of total exports but declined by 10.9 percent following weak iron ore production, which constitutes the bulk of mineral exports. Agricultural exports increased by 43.7 percent in 2017, driven mainly by cocoa and coffee, while exports of fisheries products increased by 90.6 percent on account of reforms in the fisheries sector (WBG, 2018). Most recent commodity export data from the OEC shows in 2019, Sierra Leone exported a total of \$697M, making it the number 162 exporter in

the world. During the last five reported years the exports of Sierra Leone have changed by -\$1.51B from \$2.21B in 2014 to \$697M in 2019. The most recent exports are led by Titanium Ore (\$194M), Rough Wood (\$116M), Diamonds (\$113M), Aluminum Ore (\$74M), and Cocoa Beans (\$33.2M). The most common destination for the exports of Sierra Leone are Belgium (\$180M), China (\$177M), Romania (\$65.1M), United Arab Emirates (\$42.4M), and Germany (\$37.9M). See Table 4 and 5:

Table 4: Top 5 Export Commodities from Sierra Leone & Top 5 Destinations

5 Highest Exported Products & Volumes (\$)		Top 5 Export Destinations & Volumes (\$)	
Product	Volumes (\$)	Country	Volume (\$)
Titanium Ore	194M	Belgium	180M
Rough wood	116M	China	177M
Diamonds	113M	Romania	65.1M
Aluminum Ore	74M	United Arab Emirates	42.4M
Cocoa beans	33.2M	Germany	37.9M

Source: Extract from 2019 OEC figures (<https://oec.world/en/profile/country/sle/>)

Table 5: Export and Import Trade Volumes Between Sierra Leone and Other African Countries

Export to African Countries			Imports from African Countries		
Country	Volumes (\$)	% of Overall Country Export	Country	Volumes (\$)	% of Overall Country Import
Ghana	9.21M	1.32%	Ghana	60.1	5.19%
Cote d’Ivoire	7.47M	1.07%	South Africa	47.9M	4.14%
Senegal	6.54M	0.94%	Senegal	14.3M	1.24%
South Africa	2.69M	0.39%	Morocco	10.5M	0.91%
Gambia	2.43M	0.35	Egypt	5.89M	0.51%

Source: Extract from 2019 OEC figures (<https://oec.world/en/profile/country/sle/>)

Sierra Leone much until now had not utilised other trade platforms such as the African Growth and Opportunity Act (AGOA) instituted by the then Bill Clinton led government of the United States of America. However, latest available information shows steps are being taken to put the country in readiness to use all such available trade platforms. The country has formulated what they call the “Sierra Leone National African Growth and Opportunity Act (AGOA) Response Strategy (2019 to 2025). This National Strategy Document is to set the stage to improve processes to enhance the county’s agriculture and agri-business; fishery and textile industries, export to the United States of America. Trade volumes between Sierra Leone and the United States of America is considered very low as compared to the country’s trade volumes with China and some European countries. Under the AGOA, Africa countries whose selected products meet the American export and trade standards and requirements, are allowed to export duty free to the United States of America.

Several African nations are utilizing this trade window to boost their trade volumes with USA and Sierra Leone seeks to do same with the National Strategy developed.

Under the renewed efforts to benefit from the AGOA arrangement, Sierra Leone is prioritising products such as cashew, cocoa, processed cassava (gari), ginger and palm oil; fish and fishery products; smoked/dried fish; natural honey and textile. Investments and capacities of industries including small-scale enterprises are being built enable them to engage with their potential US counterparts to boost trade volumes between the two countries.

3.4 Lessons Learned - Historical Perspectives

Sierra Leone's quest for economic recovery and journey to prosperity are largely hinged on the country's ability to ensure peace and sustenance of



Sierra Leone Farmer Happily
Nursing crops
Source: CC BY-SA-NC

“
*Total exports in
Sierra Leone
increased to 18.6
percent of GDP
in 2017 from 17.4
percent in 2016,
attributable to the
increase in
agricultural and
fisheries exports.*
”

current democratic governance. The stability currently being enjoyed after a decade of internal war and instability (between 1991 and 2001) is giving room for trade and investments. Successful polls in recent elections that have made it possible for the exchange of power to opposition parties in two instances have given confidence to the international community of the preparedness of the nation to put the past behind them. However, the following areas need critical attention to ensure continued economic growth and recovery:

i. *Need for diversification of the economy to reduce current over reliance on agriculture and mining. As stated above, mining alone contributes over 60% of the country's exports. The heavy reliance of the extractive sector thus poses a lot of threat to the economy of Sierra Leone when there is a down-turn in global demand and pricing. Iron ore exports currently tops the mineral exports of the country and any instability in this sub-sector significantly topples the foreign exchange earnings of the nation. Opportunities for diversification can be found also in the agricultural sector particularly in the area of cassava production. The country therefore could speed investment in production and in processing of cassava produce for the African market under the AfCFTA arrangements.*

ii. *Need for continuous engagement with mining exploration firms to avoid the 2013 incidence where some firms were closed down by the government of the day. Such fears of lack of respect for business protocols and conventions, have the potential of scaring of potential investors. The 2013 incidence for instance is linked directly to the slow prospecting and exploration activities in the extractive sector in recent past.*

iii. *Further strengthening of inter party democracy and rule of law. Although, there appears to be lingering tensions between the two main opposition parties in Sierra Leone, the shining example of power exchange between opposition parties, give confidence to the business community. there is therefore the need find more acceptable democratic and inclusive processes to address electoral, alleged corruption cases and other development related cases.*

iv. Need for investment in trade infrastructure and logistics. Like many other economies in West Africa and Africa as whole, Sierra Leone's productivity in value addition and manufacturing is very low. Agricultural and mining products are largely exported in their raw state. With the coming into being of the AfCFTA, the country risks being choked with imports without a commensurate export of finished product from within if investment in such infrastructure are not prioritized.

v. Need to develop and upscale standards for goods and services. The example of Sierra Leone not able to trade under AGOA since its inception in 2000 due to the country's lack of preparedness to meet terms and conditions set out to aid exports to the United States of America, calls for government's prioritization of institutional strengthening and infrastructure development. The 2019 to 2025 AGOA Strategic Plan development is a good step but more needs to be done to ensure produce from the country meets international standards to aid exports not only to the Americas and Europe but to other African countries under the AfCFTA.

Chapter 4

STATUS OF IMPLEMENTATION OF AfCFTA IN SIERRA LEONE – THE STORY OF LOCAL INDUSTRIES

4.0 Introduction

This section highlights evidence of some of the limited processes in relation to what has been done in Sierra Leone so far in relation to the implementation arrangements for the roll-out of AfCFTA. The implementation of the AfCFTA officially commenced in January, 2021 and Sierra Leone as a key member of the 54-countries that have signed the agreement also started the implementation process in January this year though not comprehensive and quite slow.

4.1 Ratification and Implementation Structures

According to Article 23 of the Agreement Establishing the African Continental Free Trade Agreement (AfCFTA), entry into force occurs 30 days after the 22nd instrument of ratification is deposited with the Chairperson of the African Union Commission (AUC) – the designated depositary for this purpose. The Agreement entered into force on 30 May 2019 for the 24 countries that had deposited their instruments of ratification by this date.

As at 9 September 2021, 38 countries had deposited their instruments of ratification (ordered by date) including the Republic of Sierra Leone:

Ghana, Kenya, Rwanda, Niger, Chad, Eswatini, Guinea, Côte d'Ivoire, Mali, Namibia, South Africa, Congo, Rep., Djibouti, Mauritania, Uganda, Senegal, Togo, Egypt, Ethiopia, Gambia, Sahrawi Arab Democratic Rep., Sierra Leone, Zimbabwe, Burkina Faso, São Tomé & Príncipe, Equatorial Guinea, Gabon, Mauritius, Central African Rep., Angola, Lesotho, Tunisia, Cameroon, Nigeria, Malawi, Zambia, Algeria and Burundi.

4.1.1 Sierra Leone: Parliamentary ratification of the AfCFTA Agreement

The Parliament of Sierra Leone on the 7th of November 2018 debated and ratified with unanimity the African Continental Free Trade Area (AfCFTA) Agreement, aimed at promoting trade liberalization in Africa. The parliamentary discussions centred on the benefits the country stood to gain in ratifying and fully participating in the implementation of the Agreement. A number of key quotes were made by key officials. This is summarised in Box 1 below:

Box 1: Highlights of statements made by key speakers at the ratification session

Speaking prior to ratification, the Minister of Trade and Industry Peter Bayuku Konte' "highlighted the importance of the free trade Agreement. He also said that the Agreement will cover an African market of 1.2 billion people and a gross domestic product of \$2.5 trillion across all 55 Member States of the African Union. He furthered that in relation to a number of participating countries "it will be the world's largest free trade area since the formation of the World Trade Organization". He said the Agreement will progressively eliminate tariffs on intra- African trade, aimed at making trade easier for businesses within the continent".

Making his submission on the Agreement, the Leader of National Grand Coalition (NGC), Hon. Kandeh Yumkella said that the Agreement is important for Africa and the African Union. He also said that the AU is "moving from a political organization to an economic one". Speaking on the need for ratifying the Agreement, Dr. Yumkella said that "it had been debated and deliberated upon in the Pan-African Parliament for enactment and domestication in other national parliaments in Africa".

The Leader of Coalition for Change (C4C), Hon. Saa Emerson Lamina supported the ratification of the Agreement and commended the Government of President Bio for signing it. He recalled that as a Member of the ACP-EU Parliament a lot of deliberations had been done on the Agreement geared towards smoothening bilateral trade liberalization for Africa.

In rounding up the debate, the Leader of the Opposition, Hon. Cherner R.M Bah welcomed the initiative of the Government by signing the free trade Agreement. He also recalled that the ECOWAS Parliament had spent ten days in Abidjan deliberating on the need for a free trade Agreement for Africa, whilst encouraging the Ministry of Trade to do all within its power to ensure that Sierra Leone derive huge benefits from the free trade Agreement.

In concluding the debate, the Leader of Government Business, Hon. Sidie M. Tunis described the Agreement as “important for the development of the country, especially in the area of Small and Medium Enterprises”. He further indicated that the Agreement is good for Africa, particularly for the development and promotion of trade in Sierra Leone.



Street scene in Freetown
Source: Erik Cleves Kristensen

4.1.2 Enabling Environment

- **Relatively stable political environment**

In the early 1990s, the rebel group Revolutionary United Front (RUF) launched Sierra Leone’s civil war (1991–2002), resulting in indiscriminate killings of citizens irrespective of their tribal, religious, or political affiliations. The conflict gradually engulfed the entire country until it was formally ended in January 2002 by a peace accord. Sierra Leone has moved on from conflict to stability, holding three presidential and general elections between 2002 and 2012, including a change in government in one instance. This puts the country on the path of political stability that can be harnessed for economic growth and development through the AfCFTA Agreement.

- **Financing Arrangements**

Overall, the financial sector in Sierra Leone remains broadly

stable, but significant risks persist. Total assets of the banking system increased by 17.4 percent to Le 7.43 trillion in 2017, funded mainly by increases in deposits and share-holders' funds. The total deposit base expanded by 4.0 percent to Le 5.27 trillion in 2017, while shareholders' funds grew by 42.6 percent to Le 1.05 trillion, accounting for 11.6 percent of total liabilities in 2017. The average capital adequacy ratio of the banking industry increased from 30.7 percent in 2016 to 34.1 percent in 2017, indicating a strong capacity for loss absorption. Although capital adequacy appears high, it does provide significant buffers because credit risk is not adequately captured and situations vary widely across banks. The stress of the two largest banks in the system represents a significant strain on the financial system and a challenge for the authorities.

Despite pressure on the current account, the exchange rate remained relatively stable in 2017, reflecting the tighter monetary policy stance of the Bank of Sierra Leone (BSL), inflows to the financial account and suspension of the weekly foreign exchange auction, which reduced speculation in the market. According to the most recent International Monetary Fund (IMF) assessment, Sierra Leone's real effective exchange rate was overvalued by about 17 percent. The BSL has sought to promote more flexibility of the exchange rate in order to improve external balance. The relatively stable financial environment in Sierra Leone should be further strengthened so SMEs can have access to flexible financing arrangements that will drive economic growth and development.

4.2 Level of Implementation of the AfCFTA

4.2.1 Development of Trade and Investment Strategy

Sierra Leone is reported to be developing a trade and investment strategy in response to the call to get the country to be in readiness for the intra-Africa trade under the AfCFTA. The Strategy Document will guide the internal implementation of the AfCFTA (IGC 2021). The implications of the AfCFTA agreement on small open economies like Sierra Leone are far reaching. Understanding what strat-

egies such countries should adopt to maximize benefits from the agreement are extremely important and topical. The trade and investment strategy being developed by the country could therefore focus on critical review of the trade potentials of the country and with special attention on the prioritisation of areas that the country invest and build capacities to shore up exports from the country.

4.2.2 Capacity Building Initiatives/Programmes

As part of the preparatory activities in readying the business community to take full advantage of the AfCFTA, a number of capacity building programmes have been rolled out. These comprised the following:

- *ECOWAS and UNDP collaborate to deliver Capacity Building Programme for women:*

First in the series of capacity building programmes was organized by ECOWAS in collaboration with UNDP under the theme:

‘Maximizing Opportunities in The AfCFTA’ For SME Producers and Traders’

On the 7th of April, 2021, UNDP and the Economic Community of West African States (ECOWAS) Commission launched a Training of Trainers programme for participants in the ECOWAS region in Freetown, Sierra Leone for the eventual strengthening of the capacities of women small and medium enterprise traders and producers in the region to better harness the opportunities and benefits presented by the AfCFTA open market agreement.

The Capacity Building Programme named Maximizing Opportunities in the African Continental Free Trade Area was conducted from 7-9 April in Freetown, Sierra Leone. The training programme particularly focused on enhancing the capability of women and youth in the ECOWAS region to take charge of the AfCFTA. The Training was for Trainers to acquire skills and knowledge which they will further share among their peers and community members to make the most and best of trade opportunities within the newly created One African Market brought about by the AfCFTA Agreement.



Figure 12: Participants at the launch of the training in Freetown, Sierra Leone.

Source: UNDP/Sierra Leone

Note: Representatives of AfCFTA, UNDP, ECOWAS, Development Partner Organizations and training participants in a group photo session at the launch of the training in Freetown, Sierra Leone.

The AfCFTA is expected to generate opportunities for SME traders, producers, service providers and investors in the region by providing access to cheaper input sources, scaling businesses, increased exports (especially of value-added products), and through the development of the much-needed beneficial regional value chain. With mostly women and youth participants, the training-of-trainers' sessions comprised of:

- *Practical guidance for exploring opportunities and navigating trade formalities will be provided in this session. The modalities for exporting goods and services into various African countries.*

- *A compendium of issues related to e-commerce which can enable or inhibit trading across borders through electronic channels.*
- *Practical tools and templates to explore and enter new markets will be discussed. Financing instruments and channels available at continental, regional and national levels.*
- *Tools including the African Trade Observatory and the Non-Tariff Barriers Reporting Mechanism.*
- *Open discussions to highlight perspectives and concerns of traders, and discussion on modalities for national workshops.*

In relation to attendance, the capacity building session were attended high level trade officials including the Director of the UNDP Regional Bureau for Africa, Vice President of ECOWAS, Business Associations in the ECOWAS region, representatives of the ECOWAS Commission, African Union Commission (AUC), Afrexim Bank, German development agency (GIZ), International Trade Centre (ITC), United Nations Development Programme (UNDP), United Nations Economic Commission for Africa (UNECA), United Nation Conference on Trade and Development (UNCTAD) will also participate in the conduct of the training of trainers workshop.

Discussions and deliberations centred on the opportunities presented by the AfCFTA across the different sectors of the economy, especially for women and the youth, issues of quality and standards for export products and so forth. Box 2 below provides some highlights in terms of presentations and discussions:

Box 2: Highlights of statements made by key speakers at the training

Representing Ms. Ahunna Eziakonwa, the Assistant Secretary General and Director of the UNDP Regional Bureau for Africa, at the opening of the training, the UNDP Resident Representative in Sierra Leone, Pa Lamin Beyai remarked that, “in partnership with other sister agencies such as the United Nations Economic Commission for Africa (UNECA), United Nations Conference on Trade and Development (UNCTAD) and the International Trade Centre (ITC), we will articulate the AfCFTA Agreement, highlight the requirements for exports to various African countries, discuss e-commerce as a tool for exploring new markets, and provide an overview of financing instruments available to SMEs for cross-border trade”. “As a development-oriented organization keen to deliver on its capacity building programmes in maximizing opportunities so that no one is left behind, UNDP commits to supporting the implementation of the Agreement, and will continue to work with ECOWAS and other partners not only in the delivery of this training for trainers, but also in other broader partnership areas to make the AfCFTA Agreement work tangibly for the targeted groups in the ECOWAS region” he added.

The AfCFTA will create an African market for goods and services covering 1.2 billion people and a combined Gross Domestic Product of US\$3 trillion, building on the progress towards integration achieved in regional economic communities such as ECOWAS.

According to Her Excellency Finda Koroma, the Vice President of ECOWAS, “within the AfCFTA market, there are opportunities for traders, producers, service providers and investors originating in the ECOWAS region to source cheaper inputs, scale businesses, increase exports, especially of value-added products, and develop beneficial regional value chains”.

UNDP’s support to AfCFTA Agreement mainly focuses on women and youth empowerment as these are the “two groups which have the ability to lead and drive Africa’s economic transformation in pursuit of progressive liberalization of services which prioritize five areas – business development, Information Communication and Technology, financial services, transport and tourism which will unlock important high-value opportunities for production, work, and trade within the continent” according to UNDP’s Resident Representative in Sierra Leone.

The three-day training module provided both theoretical and practical knowledge on the AfCFTA and improving teaching skills in order to help the private sector understand the terms, measure the potential benefits and take advantage of the provisions of the AfCFTA. Highlights were also given to priority value chains, regional strategy, and ECOWAS approach and priorities. Also, issues related to the identification of applicable tariffs, regulations, and institutions, completing trade formalities, meeting standards and certification requirements were discussed among others.

4.3 Preparedness of local businesses to take advantage of the AfCFTA

In assessing the readiness/preparedness of businesses in Sierra Leone to take advantage of the AfCFTA, the desk review could not find any evidence whatsoever to this effect. Efforts made at accessing evidence from the Ministry of Trade and Industry was not successful. It is therefore extremely important that research surveys be conducted to assess how prepared the business community in Sierra Leone is in taking advantage of the many benefits presented by the AfCFTA Agreement.

4.4 The Gap Analysis / Implementation Challenges

Full implementation of the Agreement will not be free of challenges. Implementation of the Agreement is likely to face various challenges given the nature and extent of policy and institutional changes, infrastructure development and resources required for effective implementation. These comprise the following:

4.4.1 Challenges Facing Small- and Medium-size Enterprises (SMEs)

Funding and access to funding has been the bane of most companies in across the developing world including Sierra Leone. A study conducted by the World Bank in 2017 about the challenges faced by SMEs in Sierra Leone showed that SMEs rank access to finance as the foremost binding constraint to competitiveness, with 65.1 percent of respondents citing access to finance as a major impediment in Sierra Leone compared to the 38.3 percent Sub-Saharan average (Figure 13). Accessing affordable finance is a major impediment to the growth of private sector companies, with commercial banks loans attracting an interest rate of 18 percent (up to 22 percent in 2014) per annum. The challenge of accessing affordable finance is compounded for agribusinesses due to the dire lack of agri-financial products being offered by banks, given the relatively underdeveloped financial sector.

On the use of financial services by private firms, the same survey showed that only 67 percent of small firms had a checking or savings account while 90 percent of medium-sized firms operated bank accounts to manage their liquidity and payments needs. In addition, only 8 percent of SMEs had received a bank loan compared to 42 percent of large firms, indicating a limited pool of funds for firms. The total amount of credit offered by the banking sector to the private sector was less than 5 percent of the GDP, and the largest share of that credit constituted loans to the five largest borrowers. Access to credit is vital for expansion and growth by SMEs, especially those in the agriculture sector, but this is virtually impossible for firms in Sierra Leone. For SMEs to be competitive enough across the sub-region and to fully benefit from the operationalization of the AfCFTA, access to flexible financing will be key.

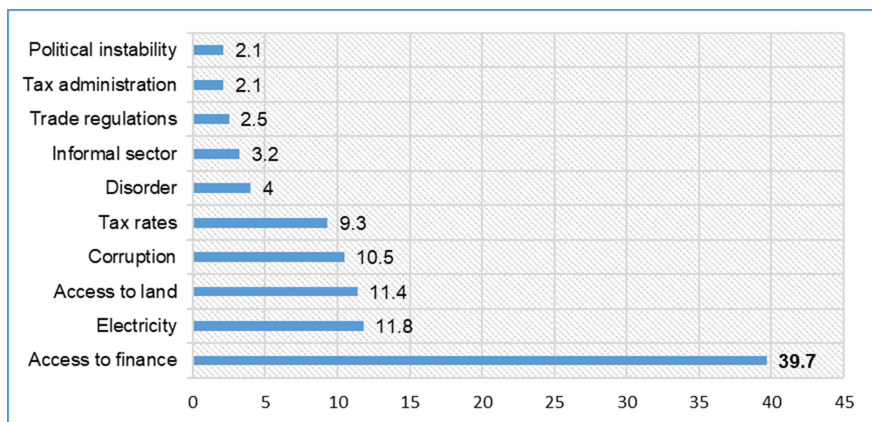


Figure 13: Ranking of the Top Business Environment Obstacle for Firms

Source: Enterprise Survey – Sierra Leone 2017

4.4.2 Policy Gaps

Empirical evidences have shown that there are positive gains in joining the AfCFTA. However, the benefits to be derived from the Agreement depends on (a) having a national strategy (b) the design of the strategy (c) how fast the national strategy is developed and (d) the implementation of the national strategy. Currently, there is no evidence of any policy documents developed to guide the implementation of AfCFTA in the country.

4.4.3 The Data Gap

Review of detailed literature including reports and published articles largely shows limited data on the implementation of the AfCFTA in Sierra Leone. The study could not find any data related to the following:

- *Policy framework to guide the implementation*
- *Public/private partnerships relating to the implementation of the AfCFTA*
- *Information on the number of firms that are working to take advantage of the AfCFTA*

“

Empirical evidences have shown that there are positive gains in joining the AfCFTA

”

Chapter 5

KEY POLICY AND IMPLEMENTATION RECOMMENDATIONS

5.1 Lessons Learned

Based on the extensive desk review, a number of key lessons were learned to guide implementation of the AfCFTA in Sierra Leone. These comprises the following:

- *The benefits that come with the full implementation of the AfCFTA to the general economic growth and development of Sierra Leone is well documented. However, achieving these benefits requires the enactment of proper legislation, policy documents and sustained support and strengthening of the business community and improvement in financing arrangements. This calls for a more coordinated approach among all key stakeholders with the Ministry of Trade and Industry taking the lead role.*
- *The organisation of the Trainers of Trainers capacity building in Sierra Leone provided the opportunity for the business community to be trained on all the AfCFTA protocols. This requires trickling down arrangements to ensure that the training is cascaded to all levels of the business community in the country – to better strengthen the SME community to take full advantage of the benefits presented by the AfCFTA agreement.*

5.2 Conclusions

The AfCFTA is a key step towards achieving the vision of an African Economic Community as one of the largest trade areas in the world. With almost all the 54-member countries of the AU signed onto the pact, the over 1.3 billion population of Africa will create one of the largest trading platforms and holds the potential to create the needed incomes to liberate the economies of participating African

nations all things being equal. The AfCFTA officially commenced in January, 2021 and Sierra Leone as a key stakeholder in the Agreement, has also started implementation processes in the same period. This desk study is therefore a part of the preliminary gathering of data/information on the Agreement and the associated protocols, the status of Sierra Leone's implementation and responsiveness, the readiness of local industries to take advantage of the opportunities presented through the AfCFTA and the possible implementation challenges and recommendations.

This desk study makes a contribution to the scanty available literature on the implementation of the AfCFTA in West Africa and specifically Sierra Leone and across other parts of Africa. The findings show very little evidence of any ongoing activities and initiatives – implying so much more work is required at the policy level, implementation level, resources level and the knowledge (advocacy) level. Even as participating countries prepare and take appropriate measures in preparation for the full operationalisation of the Agreement, businesses in Sierra Leone must be well positioned for the various opportunities available under the AfCFTA.

5.3 Policy Recommendations

Based on the findings and the lessons learned from the study, a number of key policy recommendations have been made to guide ongoing implementation processes in Sierra Leone:

5.3.1 Need for the development of a implementation policies and structures to operationalise the AfCFTA Implementation

Evidence from the review of available documents/literature shows that there is no specific policy direction for the implementation of the AfCFTA in Sierra Leone to give direction to the implementation of the AfCFTA. There is also no evidence of implementation structures in the country. Secondly, operationalising the policy framework requires the need to develop a strategic plan for the implementation

of the AfCFTA in the country. The absence of such basic structures leaves a very huge gap in the implementation process---leaving a major gap in implementation direction.

In line with this, the following recommendations are made:

- *The Ministry of Trade and Industry should work at leading the process to develop national AfCFTA Policy Framework with an accompanying implementation plan to guide the implementation process in Sierra Leone.*
- *The Ministry should also lead the process in establishing implementation structures including a steering committee etc to coordinate the implementation of all aspects of the AfCFTA.*

5.3.2 Need to conduct comprehensive primary research on the AfCFTA implementation in Sierra Leone:

The review showed very scanty and limited evidence in relation to information on Sierra Leone's implementation of the AfCFTA. In the face of this limitation, comprehensive primary research employing mixed method approach (quantitative and qualitative) would have enriched the study. In lieu of this, it is recommended that primary research comprising key informant interviews, FGDs and a survey with the private sector groups and individuals, government officials responsible for the implementation of the AfCFTA, officials from the Ministry of Trade and Industry, and all other identifiable groups and individuals.

5.3.3 Need to strengthen stakeholder consultations

The results of the desk review study shows that so far, only one national level 'trainers of trainers' capacity building workshop has been conducted since January, 2021. Though this is laudable, the evidence from the study shows no other regional or local level capacity building programmes have been done. This calls for decentralized training and capacity building programmes to be organised especially for the business community – including women and youth.

5.3.4 Financial Strategies for Businesses

Access to flexible financial resources has largely been the bane of most businesses in Africa including Sierra Leone, especially SMEs. Though the financial system in the country is relatively stable, a conscious effort should be made at reducing interest rates on lending to make the local industries much more competitive.

5.3.5 Need to conduct cross-country research on status of implementation of the AfCFTA

The desk study showed non-existent data/information on the status of implementation across all the countries that have signed up to the AfCFTA. This could pose a major challenge to tracking the gains made. In line with this, it is recommended that a cross-country study be conducted after the first year of implementation to measure progress of implementation.

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www.gga.org

Telephone: +233(0) 302 777762

Email: info.westafrica@gga.org

Physical address: The Paragon, 3rd Floor Master Bannor
Street / 9th Lane, Osu behind the Trust Hospital, Osu-Accra

Facebook: [ggawestafrica](https://www.facebook.com/ggawestafrica)



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