ECONOMIC PERFORMANCE IN EAST AFRICA: PERCEIVED IMPACT ON SUBJECTIVE WELLBEING

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Abstract

This study identifies challenges and opportunities in achieving greater social cohesion and their implications to regional development in East Africa.

Descriptive analysis was done from an in-depth desk review of reports on historical economic performance in the East African region covering the period "lost decades" of the 1980s and 1990s and the period of improved economic performance (2000 to 2015). In addition, a comparative analysis of East African region and selected countries globally in which social cohesion has enhanced regional sustained development and welfare was undertaken in order to offer lessons for the East African region.

The findings of the study reveal that in spite of improved economic performance in East Africa region since 2000, majority of the population of the region do not share the perception that this leads to an improvement in their wellbeing. While a number of economies in the region like Rwanda are now among the fastest growing in the world, the growth has not translated into shared prosperity.

In order to achieve a broad-based prosperity, countries need to pay particular attention to public investments in social services and infrastructure with the aim of reducing poverty and promoting the well-being of their citizens.

The study has empirically determined that the challenge facing governments of the countries in the region is how to improve equity and sustain high economic growth at the same time.

Keywords: Economic performance, social wellbeing, sustainable development

1.1 Introduction

Economic performance in the Eastern African region has improved markedly since 2000, in stark contrast to the condition in the 1980s and 1990s, which can be considered 'lost decades.' A number of economies in the region (e.g., Ethiopia, Rwanda) are now among the fastest growing in the world. Nonetheless, opinion polls carried out across the region (e.g. Gallup 2013) suggest that many citizens of the region do not share this perception as reflective of improvement in their wellbeing. Simultaneously, in many countries of Eastern Africa, it would appear that citizens do not appreciate the efforts of their governments to promote wellbeing, tackle poverty and narrow the gap between rich and poor. Subjective wellbeing is based on perceptions rather than on objective economic variables such as consumption or income.

This study identifies challenges and opportunities in achieving greater social cohesion and their implications to regional development in East Africa.

1.2 Methodology

The study utilized descriptive statistics obtained from an in-depth desk review approach of reports on historical economic performance in the East African region covering the period regarded as "lost decades" of the 1980s and 1990s and the period of improved economic performance (2000 to 2015). In addition, a comparative analysis of East African region and selected countries globally in which social cohesion has enhanced regional sustained development and welfare was undertaken in order to offer lessons for the East African region.That review provided the following information:

i. The problems/challenges that were being addressed at each stage of transformation;
ii. The recommendations and policies that were made to address the problems/challenges; and
iii. The extent to which the recommendations were implemented and the gaps that are currently experienced in the implementation.

The comparative analysis was limited to answering the following three questions:

i. What is going on in terms of improving social cohesion and welfare in Eastern African countries?

ii. Why is there such an apparently low appreciation by the public of the achievements of national governments in terms of improving social cohesion and welfare in the Eastern African region?

iii. Which policies have other better integrated regions put in place to improve social cohesion and welfare that the countries in the Eastern African region have not?

We also undertook a critical review of public opinion polls across the region (GALLUP, AFROBAROMETER) and what they inform about public aspirations and social cohesion.

1.3 An Overview of the Economic Performance in Eastern Africa

Africa, as a whole, experienced moderate growth from the mid 1960s until the end of the 1970s (UNCTAD 2001). Since 2000, the average growth rate of the economy in many African countries (Eastern African countries in particular) has exceeded the growth rates attained by many developing countries. Eastern African countries have posted improved growth rates, largely from the primary commodity-driven recoveries, and most seem to have recovered relatively quickly from the global economic crisis of 2008/9. The current accelerated growth across the region is being driven by the service, construction and transport sectors. Although the economy of Eastern Africa is still performing strongly by international standards, UNECA 2013 report indicates that Eastern African regional growth declined by 0.7 per cent to 6.2 per cent in 2012 from 6.9 per cent in 2011(Table 1).

Eastern African region has fallen behind all other regions on most development indicators. For example, although USD 1.25-a-day poverty has been reduced in relative terms in most countries across the region (from 65 per cent in 2000 to 54 per cent of the population in 2011), the absolute number of citizens living below the international poverty line has increased from 155 million to 166 million over the same period (UNECA 2013).

Table 1: National Rates and Regional GDP Growth (Eastern Africa % Annual Change) 2008-2014.

	2008	2009	2010	2011	2012	2013	2014	Average Growth Rate (2008-13)
Ethiopia	11.2	9.9	10.4	11.5	8.8	11.4	10.8	10.5
Rwanda	11.1	6.2	7.2	8.2	8.0	6.6	7.6	7.9
Tanzania	7.4	6.0	7.0	6.5	6.9	7.0	7.3	6.8
Congo D. R.	6.2	2.8	7.1	6.9	7.2	8.0	8.0	6.4
Uganda	10.4	4.2	6.1	4.1	3.2	5.8	6.6	5.6
Burundi	13.6	3.5	3.9	4.2	4.0	4.4	4.6	5.6
Djibouti	5.8	5.0	3.5	4.4	4.8	5.3	5.8	4.8
Kenya	1.5	2.6	5.6	4.3	4.6	4.8	5.5	3.9
Seychelles	-2.1	-1.1	5.9	7.9	2.8	3.7	4.0	2.9
Eritrea	-9.8	3.9	2.2	8.7	5.5	6.0	6.6	2.8
Somali	2.6	2.6	2.6	2.6	2.0	2.0	n.a.	2.4
Comoros	1.0	1.8	2.0	2.2	2.5	3.4	3.8	2.1
Madagascar	7.1	-4.2	0.4	1.6	1.9	2.6	3.6	1.6
South Sudan	n.a.	4.3	4.2	1.9	-47.6	24.7	n.a.	-2.5
Regional Growth rates								
EAR-11	7.4	5.1	7.0	6.9	6.2	7.4	7.7	6.7
World	1.5	-2.1	4.0	2.8	2.4	2.4	3.2	1.8
Africa	5.2	2.7	4.7	1.0	5.4	4.0	4.9	3.8
EU-28	0.4	-4.5	2.0	1.7	-0.4	-0.1	1.4	-0.2
US	-0.3	-2.8	2.5	1.8	2.8	1.5	2.5	0.9
BRICs	7.3	4.4	8.6	7.1	5.6	5.6	5.7	6.4

Source: *UNECA SRO-EA calculations on the basis of national data (DRC, Kenya, Madagascar, Rwanda, South Sudan, Tanzania and Uganda), and UNDESA. Sources for Ethiopia 2008-2011 Central Bank's Economic and Social Indicators data; 2012 is the Central Bank Governor's Note; and 2013 and 2014 are*

from Ministry of Finance and Economic Development (MOFED). South Sudan for 2012 and 2013 are IMF estimates.
Seychelles – national data except for 2013 and 2014, where EIU data is used.
**Estimate ** Forecast*
**** EAR 11 excludes The Seychelles, South Sudan and Somalia, and is calculated on the basis of a weighted average, using GDP PPP estimates from the IMF*

1.4 Overview of Economic Performance of Selected Eastern African Countries

1.4.1 Kenya

Kenya is the commercial and financial hub of East Africa. It is the largest economy in the region and was estimated to have grown at 4.6 per cent in 2012. It is also one of Africa's major tourist destinations. The country has a market-based economy with a liberalized foreign trade policy. But over reliance on agricultural production and tourism makes the economy vulnerable to international market highs and lows. Incomes from tourism as well as remittances from Kenyans living abroad are two major sources of foreign exchange revenues.

According to the Kenya National Bureau of Statistics (Economic Survey, 2015), Kenya's economy is estimated to have expanded by 5.3 per cent in 2014, compared to a growth of 5.7 per cent in 2013. From the demand side, growth was mainly driven by an increase in private final consumption and a rapid growth in capital investment. From the supply side, the major drivers of the economy were agriculture, forestry and fishing; construction; wholesale and retail trade; education; and finance and insurance. However, accommodation and food services (hotels and restaurants) sector contracted for the second year in a row.

The Balance of Payments position improved mainly on account of proceeds from the sale of the Eurobond. However, the current account deficit worsened due to deterioration in trade deficit. Government fiscal policies in the 2014/15 national budget, focused on increased revenue mobilization and containment of growth in recurrent expenditure. Consequently, the share of the development expenditure increased to 44 per cent of the total budget in 2014/15 fiscal year from 33 per cent in 2013/14.

Kenya faces the risk of slowing growth in demand in key export markets (especially in Europe) due to the depressed demand in the European countries (UNECA 2013). Tourism has similarly been negatively affected by the slowdownin the global economy, especially the Euro zone, with international visitor arrivals decreasing by 6.1 per cent from 1.8 million in 2011 to 1.7 million in 2012. Moreover, security concerns caused a further deterioration in visitor numbers in 2013 and 2014.

The economy is still operating below its potential. It is still vulnerable to external shocks, which can erode major gains it has accomplished.

1.4.2 Uganda

Uganda has substantial natural resources, including fertile soil, regular rainfall, and sizable mineral deposits of copper, cobalt, gold and other minerals. Agriculture remains though the most important sector of the economy, employing over 80% of the work force. Coffee accounts for the bulk of export revenues.

Starting in the late 1980s, the Uganda government has pursued a series of impactful liberalization policies. The resultant macroeconomic stability, post-conflict rebound, and investment response to the pro-market reforms generated a sustained period of high growth during 1987-2010. Real gross domestic product (GDP) growth averaged 7% per year in the 1990s and the 2000s, making it one of the fastest growing African countries. However, over the past decade, the country witnessed more economic volatility and GDP growth slowed to an average of just about 5%. With the population continuing to increase at a rate of 3% per annum, per capita income growth has decelerated from a rate of 3.6% recorded in the decades of 1990s and 2002, to about 2%. (World Bank)

1.4.3 Tanzania

Since 2000, Tanzania's real GDP has grown at an annual rate of about 6.3 percent. Although its contribution to GDP is still small, at around 3.5 percent, the mining sector is the single most important foreign exchange earner for Tanzania. Between 1999 and 2007, annual gold output increased from five to 50 tons with the average annual growth rate of 38%, making Tanzania the fourth largest African gold producer. The value of formal exports of gold and total minerals has also increased steadily. In 2012 the country's estimated economic growth stood at 6.9 per cent. This growth was mainly driven by favourable international gold prices.

However, as the World Bank points out (World Bank Economic Update January 2015), this progress needs to be qualified. Approximately 40 percent of Tanzania's adult population earns less than US$ 1.25 per day, while nine out of ten Tanzanians earn less than US$ 3 per day.The rate of economic growth has continued to range at around seven percent, although this rate of growth now appears to be more volatile than previously calculated. The annual rate of inflation ranges at around 5-6 percent, while the balance of payments has remained relatively stable.

The Tanzanian economy has continued to perform strongly, recording growth of 7.3% in 2013, up from 6.9% in 2012, driven by information and communications, construction, manufacturing and other services. Medium-term prospects are favourable, with growth projected to remain above 7%, supported by public investments in infrastructure, particularly in the transport and energy sectors. Agriculture remains the mainstay of the economy, employing the majority of the workforce, but the sector is plagued by infrastructure gaps and low productivity. Despite Tanzania's impressive macroeconomic achievements, growth is not sufficiently broad based, and poverty levels remain high. A recent household budget survey indicates that 28.2% of Tanzanians are poor, and poverty remains more prevalent in rural than in urban areas.

1.4.4 Rwanda

Division and exclusion rather than cohesion marked Rwandan society from independence up to the genocide in 1994. Enormous efforts have been undertaken to bridge the deep rifts in society and heal the wounds inflicted by the genocide. Bringing government decision-making closer to the people through decentralization and adjudicating crimes of genocide and building the basis for reconciliation through truth telling are central elements in the Rwandan strategy to rebuild the social fabric of the country.

The 1994 genocide decimated Rwanda's fragile economic base, severely impoverished the population, particularly women, and temporarily stalled the country's ability to attract private and externalinvestment. However, Rwanda has since made substantial progress in stabilizing and rehabilitating its economy. GDP has rebounded and inflation has been curbed from 28.10 per cent in 1998 to 2.72 percent in April 2014. Rwanda has about 85% of its population engaged in (mainly) agriculture and some mineral and agro-processing. In 2008, minerals overtook coffee and tea as Rwanda's primary foreign exchange earner. Rwanda is moving more fully into the global economy, in part by actively promoting an open investment climate. Sound macroeconomic and structural policies backed by donor assistance have led to macroeconomic stability, robust growth and low inflation. Rwanda has been able to maintain overall macroeconomic stability and implement extensive reforms which have contributed to strong growth performance.

According to the African Economic Outlook (May 2015), real GDP grew by 7.0% in 2014, higher than the initially projected 6.0% and the 4.7% recorded in 2013. Growth in industry slowed as a result of a downturn in mining, manufacturing and construction. Public and private investments and a recovery in agriculture and services are expected to continue driving growth in the short and medium term. A public investment programme in transport and energy infrastructure has been prioritized to ease transport and energy bottlenecks and bolster economic growth.

1.4.5 Burundi

Burundi is a landlocked country and distance from the sea among other factors has tended to limit economic growth. The economy is predominantly agricultural which accounts for around 45% of GDP and employs more than 90% of the population. Burundi's primary exports are coffee and tea, which account for 90% of foreign exchange earnings, though exports are a relatively small share of GDP.

Since 2010, Burundi has recorded average annual growth of 4% despite difficult international conditions. According to African Economic Outlook (AEO, 2016), these have been characterized by rising world prices for fuel and food, leading to significant inflationary pressure. Real GDP growth was estimated at 4.7% in 2014 compared to 4.5% in 2013, largely due to agriculture through an upturn in coffee production and a dynamic construction sector implementing large-scale infrastructure projects. The budgetary balance fell from 0.4% of GDP in 2013 to -1.2% of GDP in 2014. Externally, the current account deficit, including transfers, worsened from 8.3% of GDP in 2013 to 9.5% of GDP in 2014 (AEO, 2016).

1.4.6 Ethiopia

Ethiopia is the second-most populous country in Sub-Saharan Africa with a population of about 85 million (United Nations, 2011). It is also one of the world’s poorest countries. Its per capita income of $410 is substantially lower than the regional average (World Bank, June 2013). The government aspires to reach middle income status over the next decade.

The country's economy has experienced strong and broad based growth over the past decade, averaging 10.5 per cent per year in 2008-2013 compared to the Eastern African regional average of 6.7 per cent. Expansion of the services and agricultural sectors account for most of this growth, while manufacturing sector performance was relatively modest. Private consumption and public investment explain demand side growth with the latter assuming an increasingly important role in recent years.

Economic growth brought with it positive trends in reducing poverty, in both urban and rural areas. While 38.7 percent of Ethiopians lived in extreme poverty in 2004-2005, five years later this was 29.6 per cent, which is a decrease of 9.1 percentage points as measured by the national poverty line, of less than $0.6 per day (World Bank, June 2013)

1.5 Perceived Impact on People's Wellbeing

Perception in Eastern African countries of the impact of economic performance on the people's wellbeing is generally poor. Table 2 summarizes how a sample of the citizens in some of the countries in the region describes their own living condition. The citizens in each of the countries do not rate their governments particularly well in relation to their personal living conditions across any of the four categories as shown in Table 2. The highest percentage of respondents across the four categories, with 54% for Burundi - the lowest and 71% for Kenya - the highest, described their living conditions as very or fairly bad. As the World Bank points out (Economic Update, 2015), Kenya remains a country of contrasts, especially in service delivery. On average, Kenyans are healthier, more educated, and receive better infrastructure services than they did a decade ago. At the same time, a large fraction of the population continues to live with sub-standard access to water, sanitation and energy. About 65% of Tanzanians described their living conditions as very or fairly bad. The poorer regions of the country are predominantly rural and their economies are much less diversified. Agriculture is the main economic sector in these areas, with low productivity and low-paying employment. As a result, per capita incomes in these regions are less than half that of Dar-es-Salaam, the wealthiest area. And the poverty rate is eight times higher than in Dar-es-Salaam.

Table 2: Personal Living Conditions

"In general, how would you describe your own present living conditions?"

(% of Respondents who replied)

Country	Very/Fairly Good	Neither Good nor Bad	Very/Fairly Bad	Don't Know
Burundi	25	22	54	0
Kenya	14	14	71	0
Madagascar	10	34	55	0
Tanzania	8	27	65	0
Uganda	28	10	62	0

Source: Gallup 2013

The Service Delivery Indicators (SDI) for Kenya based on surveys of about 600 primary schools and health centres and nearly 5,000 teachers and health providers, reveal that the country does better on the availability of key inputs such as infrastructure, teaching and medical equipment, and textbooks, than it does on provider knowledge and effort, which are relatively weak. The SDI results found that Kenya does relatively well on the measures of provider productivity and efficiency, the results were less positive. Regarding the availability of drugs, there are some important gaps: only two-thirds of the tracer drugs are available, and some gaps remain especially in the availability of tracer drugs for mothers.

In many countries of Eastern Africa, it is apparent that citizens do not appreciate the efforts of their governments to promote wellbeing, deal with poverty, and narrow gap between the rich and the poor. Table 3 summarizes how respondents in some of these countries rate government management of economy, improving living standards of the poor, creating jobs, and narrowing gaps between the rich and poor. For example, a majority of the respondents (55 and 81 percent in Burundi and Uganda, respectively) rated government management of the economy as very or fairly bad. Only 15 percent of the citizens of Madagascar rated the government's performance in this area as very/fairly well. The rating is even worse with respect to improving standard of living of the poor. Over 70 percent of the respondents in each of the countries rated government performance in improving living standards of the poor as very or fairly bad. Only 7 and 16 percent of Madagascans and Kenyans, respectively, rated government performance in this area as very or fairly well. More than 80 percent of the respondents in each of the five countries rated government performance in narrowing gaps between the rich and poor as very or fairly poor.

Table 3: Ratings of Government Management of Economy

"How well or badly would you say the current government is handling the following matters, or haven't you heard enough to say?"

(% of Respondents who replied)

	Managing the Economy		**Improving Living Standards of the Poor**		**Creating Jobs**		**Narrowing Gaps between Rich and Poor**	
Country	**Very/Fairly Badly**	**Very/Fairly Well**	**Very/Fairly Badly**	**Very/Fairly Well**	**Very/Fairly Badly**	**Very/Fairly Well**	**Very/Fairly Badly**	**Very/Fairly Well**
Burundi	55	41	71	28	75	20	81	16
Kenya	77	22	83	16	81	18	87	11
Madagascar	72	15	89	8	87	7	87	6
Tanzania	73	26	81	18	79	21	86	13
Uganda	81	18	77	22	78	18	82	14

Source: Gallup 2013

Asunka (2013) observes that while service infrastructure such as schools, clinics and power are necessary for delivering services to people, infrastructure alone does not guarantee effective and high quality services, thus affecting popularevaluationsofgovernment performance. Citizens report major problems with public services including inability to access services, the poor state of facilities, and high user fees. Difficulties with access to services as well as negative personal experiences with service personnel largely shape popular assessments of government performance in the continent. The mere presence of service infrastructure such as schools and clinics does little to motivate positive views about government policy performance. The majority of users identify serious shortcomings in service delivery, including long wait times (77%) and the lack of medicines or supplies (69%) in public clinics and hospitals, overcrowded classrooms (61%) and the lack of textbooks and supplies (57%) as part of basic service performance ratings in the 34 countries across Africa.

Table 4: Global Prevalence of Poverty and Extreme Poverty

	% living on $1.25 per day or less	% living on $2.00 per day or less
World (131 countries)	22 %	34%
Sub-Sahara Africa	54%	69%
South Asia	38%	60%
Southeast Asia	33%	50%
Middle East and North Africa	16%	28%
East Asia	11%	19%
Latin America	9%	17%
Balkans	5%	9%
Commonwealth of Independent States	3%	6%
Europe	1%	2%
United States and Canada	1%	1%
Australia and New Zealand	< 1%	1%

Source: Gallup, 2014

Further, accessing public services was hampered because residents reported that they had to pay bribes for these services. Bribe payment for service is most frequent in the health sector. Nearly one in five Africans (19%) admit that they paid bribe in order to get treatment in public health facilities, while fourteen percent report having paid a bribe in the past year to obtain a placement in public primary schools, and the same number say they paid a bribe for household services (Asunka, 2013).

According to Gallup Polls, 2014, large proportions across 27 Sub-Saharan African countries live in extreme poverty. The 10 countries in the world with the highest proportion of residents living on $1.25 per day or less are all in sub-Saharan Africa. In each of them, more than two-thirds of residents are living in extreme poverty; in Burundi, that proportion is close to 90%. Combining results from 27 sub-Saharan African countries for which data are available reveals that 54% of residents are living in extreme poverty -- easily the highest proportion among global regions worldwide.[1]

[1] Data for Sub-Saharan Africa is a good proxy for the situation in Eastern Africa, Gallup, 2014.

Thus, the challenges in service provision and growing poverty level cast negative aspirations on the citizens' perception of government's role in improving their social welfare.

Africans also tend to personalize their judgments about government performance - that is, according to how they feel about their own living conditions. Those who think their present living conditions are better or much better than they were a year ago are likely to approve of government policy performance (Asare, 2013) and overtime, approval ratings have declined across 16 countries in which data are available.

Citizens compare themselves to their peers; hence an absolute improvement in one's own situation might not translate into greater satisfaction with living standards or more trust, both essential ingredients for social cohesion in a society. At the same time, if this change of living standards is accompanied by related changes in other dimensions of social cohesion, frustration and dissatisfaction can be channeled into effective social change.

There is evidence throughout the Eastern Africa Region to support the belief that, in spite of a much improved economic performance in the 2000s after two decades of economic stagnation, a broad-based/shared growth has not been achieved and a lot of social and economic aspirations have still not been fulfilled. One example of this is that, although USD 1.25-a-day poverty has been reduced in relative terms in the region (from 65 per cent of the population in 2000 to 54 per cent of the population in 2011), the absolute number of citizens living below the international poverty line has actually increased, from 155 million to 166 million over the same period (UNECA, 2013). This may explain to some extent why many citizens of the countries in the region do not feel that there has been any improvement in their well-being.

1.7 Lessons from Nordic Countries

Reviews of literature suggest that the degree of social cohesion is strongest in Denmark, followed by Norway, Finland and Sweden. Non-European, English-speaking countries are ranked behind the Nordic countries. According to Bertelsmann Foundation (July 16, 2013) and others, the reasons why the Nordic countries dominate rankings in social cohesion might be due to:

- their strong welfare state that redistributes wealth and promotes the equality of opportunities;
- the high quality of these countries' institutions;
- the high national wealth and low income gaps that symbolize the Scandinavians; and
- their societies' high performance regarding ICT knowledge[2].

The case of the Scandinavian countries suggests that stable societies are identified with strong social cohesion and inclusiveness which may have positive impacts on their future wellbeing and sustainability. In addition, social cohesion and universal welfare are

[2] High level of ICT knowledge makes it easier for people in a society to communicate with each other and also with government authorities, that is, improves social connections.

politically encouraged goals across the Nordic Region. Along with welfare, the Nordic Model promotes social rights and the principle that everyone is entitled to equal access to social and health services, education and culture.

Eastern African countries can consider the experience of these countries in their attempts to address issues of social cohesion bearing in mind the differences in their historical backgrounds.

1.8 Policy Implications

In spite of improved economic performance in Eastern Africa region since 2000, opinion polls carried across the region suggest that many citizens of the region do not share this perception in an improvement in their wellbeing. The challenge facing governments of the countries in the region is how to improve equity and sustain high economic growth at the same time. In order to achieve shared prosperity, governments in East Africa need to pay particular attention to:

i. Public investments in social services and infrastructure with the aim of reducing poverty and promoting the well-being of their citizens;

ii. Jobs creation as the route to a brighter future for the region, higher productivity for their economies and greater cohesion in society;

iii. Education and training for long-term growth;

iv. Provision of health facilities since a healthy population makes the foundation of development;

v. Protecting the vulnerable in society; and

vi. Reduction in corruption and poor governance through strengthening the anti-corruption bodies with the necessary powers to execute their functions effectively.

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