COUNTRY REPORT

Senegal
The Gambia
Mauritania

2nd quarter 1999

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The Economist Intelligence Unit

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May 10th 1999

Summary

2nd quarter 1999

Senegal

Outlook for 1999-2000: President Abdou Diouf's re-election is virtually assured in the February 2000 presidential election, now that the opposition has failed to agree on a common candidate. Divisions among the Casamance rebel movement, the Mouvement des forces démocratiques de Casamance (MFDC), mean that peace talks may continue for some time. With the successful privatisation of the electricity utility, the privatisation programme will continue to move ahead and real GDP growth should remain strong, exceeding 6% per year in 1999-2000. Inflation will remain low, at 2%, but the current-account deficit is expected to widen, as import demand exceeds export growth.

The political scene: Moves towards peace in Casamance have remained unsteady and complicated by divisions within the rebel MFDC, which has continued to strike from across the border in Guinea-Bissau. An enquiry in that country has implicated the former president, João Bernardo Vieira, ousted in May, in arms trafficking, raising questions about the purpose of the Senegalese intervention in 1998. President Diouf has hit the campaign trail, backed by new pro-Diouf support groups. The ruling Parti socialiste (PS) has sought to prevent dissent in its ranks and has battled to quash the possible presidential candidacy of Moustapha Niasse, a former PS heavyweight. The opposition Union pour le renouveau démocratique (URD) has rejected a common opposition campaign for the presidential election. After the publication of a critical report on the January 1999 senatorial election, the head of the electoral body, the Observatoire national des élections (ONEL), has been removed.

The economy: More privatisations are planned, including that of the state groundnut processing company, the Société nationale de commercialisation des oléagineaux du Sénégal (SONACOS), and the cotton parastatal, the Société de développement des fibres textiles (SODEFITEX). However, the privatisations of Dakar's bus company, the Société des transports du Cap-Vert (SOTRAC) and of other companies have run into difficulties. A total of CFAfr86bn ($141m) has been allocated for development of farming and fishing this season. Sugar imports have flooded local markets, threatening domestic production and prompting a crackdown on illegal smuggling. The state-owned electricity utility, the Société nationale sénégalaise d'électricité (SENELEC), was privatised in March, amid mixed reactions from the company's trade unions. The government's share in the Société nationale des télécommunications (SONATEL) was further reduced in February, while a new mobile phone company, Sentel, has begun to compete with SONATEL. Fish exports declined slightly in 1998.

The Gambia

Outlook for 1999-2000: President Yahyah Jammeh's regime will come under increasing pressure from the opposition, raising the prospect of a crackdown. "Vision 2020", which has won the backing of donors, will guide economic policy over the coming years, but real GDP growth is unlikely to exceed 4% per year in 1999-2000.

The political scene: The leader of the opposition United Democratic Party (UDP), Ousaina Darboe, has again criticised the government, pointing to wider public discontent over economic conditions. President Jammeh has sacked a top army officer, while a leading figure in the former regime has been exonerated from corruption charges. The president has secured further aid pledges from Cuba.

The economy: President Jammeh has called for wider private-sector participation in the economy, as the government's economic programme, "Vision 2020", takes shape. Poverty reduction has received a boost from the World Bank and UNICEF, but the IMF-backed enhanced structural adjustment facility (ESAF) may have run into difficulties. The government has intervened in the rice market, setting lower prices, but this has caused confusion. Air Dabia's planes have been seized.

Mauritania

Outlook for 1999-2000: The government will seek to appease the opposition, which appears to have become more assertive. Subdued world commodity prices will affect Mauritania's main exports, iron ore and fish, hampering real GDP growth.

The political scene: After widespread fraud affected the municipal election in January 1999, President Ould Sid'Ahmed Taya has ordered a review of the electoral system. The leader of the Union des forces démocratiques (UFD), Ahmed Ould Dadah, has been acquitted over an alleged Israeli nuclear waste affair, but an independent newspaper, *Le Calame*, has been banned over the same issue. Mauritanians who fought in the Afghanistan war have been arrested over alleged connections with a Saudi dissident, Osama bin Laden. A black Mauritanian movement, the Forces de libération africaines de Mauritanie (FLAM), has held a congress. Education reforms have been adopted. A row has erupted with Morocco over Western Sahara, but ties have been strengthened with Mali and Tunisia.

The economy: The World Bank has criticised the operations of the public works agency, AMEXTIPE. The post and telecommunications utility, OPT, is to be privatised. Year-on-year inflation fell to below 5% in February 1999. Faced with a poor harvest, Mauritania has appealed for food aid and assistance has trickled in. The fight against illegal fishing has been stepped up and Greenpeace has protested against overfishing in Mauritania's waters. The World Bank has backed the development of mining, while the EU has financed gold prospecting activities. Refuelling facilities are to be improved at Nouadhibou's port and there are plans to rehabilitate the harbour. The US Export-Import Bank has extended its coverage to Mauritania.

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Next report: Our next Country Report will be published in September

Senegal

Political structure

Official name	République du Sénégal
Form of state	Unitary republic
Legal system	Based on the Napoleonic Code and the 1963 constitution
National legislature	National Assembly, with 140 members elected by universal suffrage on a mixed first-past-the-post (70 seats) and proportional representation (70 seats) system; all serve a five-year term. A second chamber of parliament, the Senate, was established in 1998, with 48 seats selected by an electoral college and 12 seats allocated by the president
Head of state	President, elected by universal suffrage, serves a seven-year term and may stand for re-election
National elections	February 1993 (presidential), May 1998 (legislative); next elections due in February 2000 (presidential), May 2003 (legislative)
National government	The president and his Council of Ministers; last major reshuffle July 1998
Main political parties	Parti socialiste (PS) is the ruling party; Parti démocratique sénégalais (PDS—the main opposition party); Parti de l'indépendance et du travail (PIT); Ligue démocratique-Mouvement pour le parti du travail (LD-MPT); And-jëff/Parti africain pour la démocratie et le socialisme (AJ/PADS); Convention des démocrates et des patriotes (CDP-Garab Gi); Parti libéral sénégalais (PLS); Union pour le renouveau démocratique (URD)

	President	Abdou Diouf
	Prime minister	Mamadou Lamine Loum
Ministers of state	Agriculture	Robert Sagna
	Presidential affairs	Ousmane Tanor Dieng
Key ministers	Armed forces	Cheikh Hamidou Kane
	Commerce & crafts	Khalifa Ababacar Sall
	Communications	Aïssata Tall Sall
	Economy, finance & planning	Mouhamed El Moustapha Diagne
	Education	André Sonkho
	Energy, mines & industry	Magued Diouf
	Environment & protection of nature	Souty Touré
	Foreign affairs & Senegalese abroad	Jacques Baudin
	Fisheries & marine transport	Alassane Dialy Ndiaye
	Interior	Lamine Cissé
	Justice & keeper of seals	Serigne Diop
	Labour & employment	Marie Louise Correa
	Public health	Assane Diop
	Tourism & air transport	Tidiane Sylla
	Urban planning & housing	Abdourahmane Sow
Governor of the BCEAO	Charles Konan Banny	

Economic structure

Latest available figures

Economic indicators	1994	1995	1996	1997	1998[a]
GDP at market prices (CFAfr bn)	2,005	2,215	2,459	2,651	2,833
Real GDP growth (%)	2.0	4.8	5.6	5.5	5.7[b]
Consumer price inflation (av; %)	32.3	7.8	2.8	1.7	1.1[b]
Population (m)	8.3	8.5	8.7	8.9	9.2
Exports fob ($ m)	819	993	988	933	976
Imports fob ($ m)	1,022	1,243	1,264	1,196	1,260
Current-account balance ($ m)	–188	–245	–200	–71	–110
Reserves excl gold ($ m)	180	272	288	387	431[b]
Total external debt ($ m)	3,658	3,841	3,664	3,671	3,376
External debt-service ratio (%)	17.1	16.7	18.5	15.3	14.8
Groundnut production[c] ('000 tonnes)	718	791	650	551	720
Exchange rate (av; CFAfr:$)	555.2	499.2	511.6	583.7	590.0[b]

May 7th 1999 CFAfr608.04:$1

Origins of gross domestic product 1997	% of total
Primary sector	19.0
Secondary sector	19.8
Tertiary sector	61.2
GDP at factor cost	100.0

Components of gross domestic product 1997	% of total
Private consumption	76.6
Government consumption	10.2
Gross domestic investment	18.7
Exports of goods & services	32.6
Imports of goods & services	–38.1
GDP at market prices	100.0

Principal exports (fob) 1997	% of total
Fish & fish products	30.7
Chemicals (ICS plant)	12.3
Groundnuts & products	5.4
Phosphates	3.4

Principal imports (cif) 1997	% of total
Intermediate goods	29.1
Food products	23.6
Petroleum products	14.0
Capital goods	13.5

Main destinations of exports 1997[d]	% of total
India	25.6
Mali	9.4
France	8.4
Côte d'Ivoire	4.6
Benin	4.1

Main origins of imports 1997[d]	% of total
France	30.6
Nigeria	7.3
US	4.8
Spain	4.5
India	3.9

[a] EIU estimates. [b] Actual. [c] Unshelled; crop years beginning October 1st. [d] Derived from partners' trade returns, subject to a wide margin of error.

Outlook for 1999-2000

President Diouf's re-election in 2000 is virtually assured

With the presidential election due in February 2000, the political scene will be increasingly dominated by the electoral campaign. Already, President Abdou Diouf and the ruling Parti socialiste (PS) have been hitting the campaign trail through a series of public rallies, replete with professions of support for Mr Diouf's re-election. There also has been a proliferation of new pro-Diouf campaign committees, designed partly to bypass the factionalism and inertia of the PS's own internal structures and partly to appeal to voters who have become disillusioned with the ruling party but who may still favour Mr Diouf over the candidates put forward by the opposition.

President's Diouf's prospects will be boosted by the fact that the opposition has been unable to agree on a common presidential candidate. Talks between the two main opposition blocs in parliament, the Parti démocratique sénégalais (PDS) and the Union pour le renouveau démocratique (URD), broke down in February, when several parties publicly declared their support for the candidacy of Abdoulaye Wade, leader of the PDS, the largest opposition group. Mr Wade has run against Mr Diouf before. As a result, Djibo Kâ, who led a faction that split from the ruling PS in 1998 to form the URD, now the second largest opposition party, proclaimed that he favoured a "plurality of candidates" in the election, an evident affirmation of his own campaign ambitions. Since there is little prospect of a serious common opposition candidate, President Diouf's re-election is virtually assured. However, the opposition may find greater incentive to unite if the president fails to secure enough votes for a first-round victory and must face the leading opposition candidate in a second round.

Peace in Casamance may take some time

President Diouf's meeting in January with the political leader of the separatist Mouvement des forces démocratiques de Casamance (MFDC) provided fresh impetus towards peace negotiations in the troubled southern province, but there is little prospect of a rapid breakthrough. The main problem remains the divisions within the MFDC itself. While the MFDC's political leader favours talks, it is not clear whether the hardline Southern Front, headed by Salif Sadio, is ready to negotiate. Some observers initially believed that the peace agreement ending the civil war in neighbouring Guinea-Bissau, where Mr Sadio's faction has its main basis, would limit its military options. However, the situation in Guinea-Bissau remains complex, particularly now that the country's president, João Bernardo Vieira, whose position was salvaged by a Senegalese military intervention in 1998, was overthrown in May. Pressure from the new Guinea-Bissau government on Mr Sadio to curtail the insurgency in Casamance is therefore far from certain. Since the different factions of the MFDC do not agree on a common negotiating framework, it will remain difficult for Senegalese officials to follow up on President Diouf's initiative and much of the debate is likely to focus on how the peace process should be pursued.

The privatisation programme will move ahead—

The sale in March of a controlling share of the power utility, the Société nationale sénégalaise d'électricité (SENELEC), to a Canadian-French partnership, will give further impetus to the government's privatisation programme. The sale is significant in several respects. It provides more evidence that the government is serious about moving ahead with privatisation, even in the face of intense opposition from the trade unions. In addition, it is a signal to unions in other enterprises slated for privatisation to negotiate more realistically. Furthermore, it will reassure both potential investors and officials of the World Bank and the IMF of the government's commitment to economic reforms in the first year of the three-year enhanced structural adjustment facility (ESAF), signed in 1998. Finally, in the longer term, there will be many benefits from SENELEC's privatisation for the economy as a whole as the new management mobilises financing for the modernisation of the company's ageing facilities and improves the supply of electricity, which has become highly unreliable and a major obstacle to economic growth in recent years.

—and growth should remain strong

Economic growth in 1999-2000 is expected to remain strong. Exports are likely to benefit from the recovery of the agricultural sector in 1999, following reasonable rains in most of the country. Output of groundnuts, Senegal's main cash crop, is expected to grow by more than 25% in 1999 to reach 640,000 tonnes. Barring unfavourable climatic conditions, exports should increase in 2000 on the back of a good performance by the agricultural sector, which will also benefit the industrial sector, in the form of increased groundnut processing. Private consumption will remain strong, as highlighted by a buoyant construction sector and expanding services, led by trade, retail and tourism. Although private investment will remain constrained by low savings and limited access to credit, investment will be underpinned by an extensive public investment programme, while the privatisation programme will attract more foreign direct investment (FDI) in the private sector.

However, a major constraint to growth will remain the vulnerability of domestic manufacturers to foreign imports, as highlighted by the flooding of local markets since January by low-priced sugar, smuggled in from neighbouring countries. This has resulted in a dramatic drop in sales of Senegal's sugar producer, the Compagnie sucrière sénégalaise (CSS). Many other domestic industries face similar constraints and some have expressed concern that they will have difficulty competing as import liberalisation becomes more generalised, especially with the further reduction of trade barriers between Senegal and other member-states of the Union économique et monétaire ouest-africaine (UEMOA). This may have an impact on real GDP growth, bringing it down from a forecast 6.5% in 1999 to 6% in 2000.

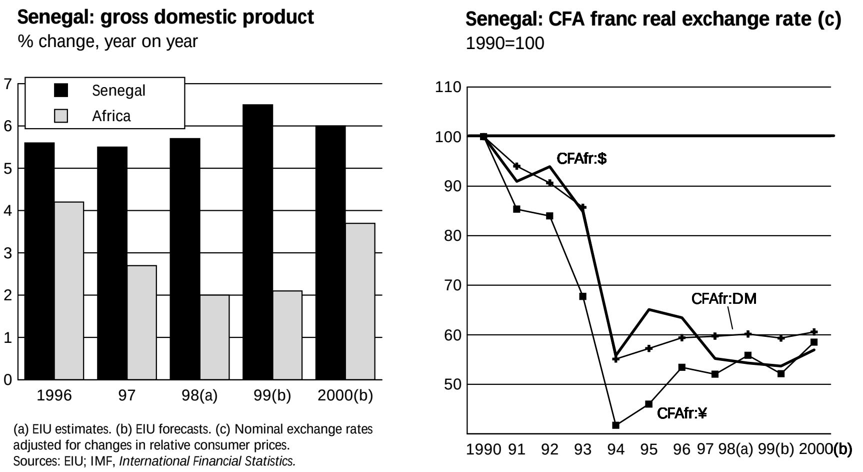
Inflation will remain low

Inflationary pressures are likely to remain subdued in 1999-2000, thanks to the government's efforts to restrain spending and the relaxation of interest rates by the Banque centrale des États de l'Afrique de l'ouest (BCEAO; the regional central bank), following the successful pegging of the CFA franc to the euro on January 1st 1999. This ended widespread speculation that it would be accompanied by a devaluation of the CFA franc. Inflationary pressures will also be restrained by the appreciation of the euro, which will recover some ground later this year and in 2000, as economic growth in the EU accelerates. As a result, the annual rate of inflation in Senegal is expected to remain low, at 2% in 1999-2000.

Senegal: forecast summary
($ m unless otherwise indicated)

	1997[a]	1998[b]	1999[c]	2000[c]
Real GDP (% change)	5.5	5.7[a]	6.5	6.0
Consumer price inflation (%)	1.7	1.1[a]	2.0	2.0
Merchandise exports fob	933	976	1,050	1,200
Merchandise imports fob	1,196	1,260	1,330	1,550
Current-account balance	–170[b]	–140	–110	–130
Average exchange rate (CFAfr:$)	583.7	590.0[a]	598.2	561.8

[a] Actual. [b] EIU estimates. [c] EIU forecasts.



(a) EIU estimates. (b) EIU forecasts. (c) Nominal exchange rates adjusted for changes in relative consumer prices.
Sources: EIU; IMF, *International Financial Statistics*.

The current-account deficit will increase

Following revisions to data on the invisibles account in the IMF's *International Financial Statistics*, Senegal's current-account deficit is likely to be larger than expected in 1999-2000. Senegal's trade deficit will widen from $280m in 1999 to $350m in 2000 as the growth in imports, fuelled by rising demand for machinery, intermediate goods and consumer goods, will outpace the growth in exports, which will suffer from declining world prices for primary commodities. Although invisibles exports will continue to make a positive contribution to Senegal's current-account balance, thanks to sizeable inflows from tourism, remittances from Senegalese abroad and moderate debt-service payments, the current-account deficit is expected to widen to $110m in 1999 and $130m in 2000.

Review

The political scene

Moves towards peace in Casamance remain fragile—

In the wake of President Abdou Diouf's high-profile meeting in late January in Ziguinchor, the capital of the Casamance region, with Father Augustine Diamacoune Senghor, the political leader of the Casamance separatist movement (1st quarter 1999, pages 9-10), numerous government officials have stressed the need to follow up on the president's initiative with more concrete steps towards direct peace negotiations. However, there remains considerable uncertainty about the most appropriate institutional channels to pursue such talks and the best strategy for dealing with the fractious Mouvement des forces démocratiques de Casamance (MFDC). On April 12th a parliamentary delegation travelled to Ziguinchor to meet with Father Diamacoune and various other Casamançais leaders. A few days later, the Commission nationale de gestion de la paix en Casamance (CNGPC), which helped broker ceasefire agreements with several MFDC factions in 1991 and 1993, held its first substantive meeting since it was reorganised after President Diouf's visit to Ziguinchor. Headed by General Boubacar Wane, the CNGPC has increased its membership to 31 people by co-opting six new members, including the minister of scientific research and technology, Balla Moussa Daffé, and Viviane Badiane, the daughter of one of the founders of the original MFDC in 1947.

—and are complicated by divisions within the MFDC—

The CNGPC announced that it would seek to function on a more formal basis and broaden its mandate to include issues of refugee assistance and economic development in Casamance. In addition, the CNGPC would continue to channel its direct contacts with the MFDC through Father Diamacoune, recognised as the separatist movement's sole interlocutor. The CNGPC argued that establishing direct contact with other MFDC leaders, as some government officials have suggested, would undermine the goal of uniting the MFDC behind Father Diamacoune, whose authority remains limited. While some of the MFDC's armed factions support his call for a ceasefire and the opening of talks with the government, the hardline Southern Front, led by Salif Sadio, has thus far shown little inclination to halt its armed insurgency. Efforts by the MFDC's Comité de pilotage provisoire (CPP) to co-ordinate the positions of the different factions are continuing.

—as rebels continue to strike

Compared with 1997-98, when large groups of Casamançais insurgents infiltrated different parts of the region from their bases in neighbouring Guinea-Bissau, the number of armed clashes or landmine incidents has been relatively limited since the beginning of 1999. However, this is probably less a consequence of President Diouf's meeting with Father Diamacoune, and more because of the heavy Senegalese troop presence in the region and along the border, following the Senegalese army's intervention in 1998 in the civil war in Guinea-Bissau (1st quarter 1999, page 10). Nevertheless, several recent incidents have demonstrated that the rebels are still able to strike, as highlighted by a hold-up of 27 French tourists in February, attacks by several dozen insurgents striking from across the border with Guinea-Bissau, and scattered fighting in February and April, which resulted in the death of several Senegalese troops and of more than a dozen insurgents.

An enquiry implicates the ex-Guinea-Bissau president in arms sales—

Before the president of Guinea-Bissau, João Bernardo Vieira, was ousted on May 6th by the former chief-of-staff of the Guinea-Bissau army, Ansoumane Mane, in mid-April that country's parliament was able to consider a report into the illegal sale of arms to the Casamance rebels. The deputies were not previously able to discuss the report because of the outbreak of the civil war in June 1998. Precipitating the war was the suspension by Mr Vieira of General Mane, ostensibly for being the mastermind behind an arms sale network within the Guinea-Bissau military. However, the parliamentary commission of enquiry did not find much evidence implicating General Mane, but listed the names of some 40 officers and other officials said to have provided arms to the MFDC in exchange for money or stolen cattle. Among them were several officers from Mr Vieira's inner circle, some of whom in turn claimed that the president knew about the arms sales and permitted them to proceed.

—and raises questions about the Senegalese intervention

The Senegalese government reacted to the commission report with embarrassed silence. Putting a halt to the arms sales and other support for the MFDC had been one of the reasons cited for Senegal's military intervention in Guinea-Bissau in 1998 on the side of President Vieira and against General Mane. It appears now that the Senegalese government not only greatly underestimated the strength of General Mane's forces, but also misjudged the complex links between the MFDC and the contending factions in Guinea-Bissau. General Mane may indeed have found himself allied with the MFDC during the height of the civil war, as the Senegalese government claimed, but it is now evident that Senegal's favoured side in the war also was implicated in aiding the Casamance separatists. This prompted Senegal's independent press to question the purpose of the intervention. Even before these revelations, Senegal's intervention had begun to raise serious doubts and some outright opposition within Senegal and there was general relief when the remaining Senegalese troops returned from Guinea-Bissau in late March. The revelations may also explain why Senegal chose not to intervene in support of Mr Vieira in May.

President Diouf hits the campaign trail—

With the presidential election due in February 2000, President Diouf and the ruling Parti socialiste (PS) are actively campaigning for re-election. Since January, Mr Diouf has made an uncharacteristic number of appearances at public rallies in different parts of the country. Most occasions have been official state inaugurations of development projects, but with a distinctly partisan atmosphere designed to drum up votes. The government-owned daily, *Le Soleil*, has given pages of coverage to the rallies, with testimonials in support of Mr Diouf's re-election by local personalities. In mid-March the head of the country's largest trade union, the Confédération nationale des travailleurs du Sénégal (CNTS), Madia Diop, pledged that the union would mobilise to ensure the re-election of Mr Diouf. Since the CNTS is directly affiliated with the PS and has six deputies in the Assemblée nationale (parliament) sitting under PS colours, such a declaration would normally not have been surprising. However, after a number of highly critical comments in previous months by Mr Diop and other CNTS leaders about the government's economic policies (1st quarter 1999, page 14), many were waiting to see if the union leadership would try to stake out a measure of political independence. Mr Diop's declaration has put a damper on such speculation for the time being.

—with the backing of new support committees

One notable feature of Mr Diop's declaration, however, was a tendency to set Mr Diouf apart from the rest of his cabinet and party leadership, with the president portrayed as more attentive to workers' concerns than other officials. A similar theme is evident in much of the official campaign rhetoric, where Mr Diouf is pictured as standing above the PS or other partisan formations and as seeking to represent the interests of all Senegalese. This approach effectively acknowledges some of the credibility problems facing the ruling party, which saw its share of the popular vote decline to a bare majority (50.2%) in the last legislative election in May 1998. By focusing the campaign more tightly on his personal leadership record, Mr Diouf may hope to secure more support than if he is identified too narrowly with the PS. A similar concern lies behind the proliferation of new pro-Diouf support committees around the country. These committees also provide Mr Diouf's campaign with a way to bypass local party structures, some of which have become ineffective at mobilising support because their leaders are unpopular or they are divided by factional squabbles.

The PS seeks to prevent further dissension among its ranks—

National PS leaders are struggling to contain the unresolved leadership differences that have encouraged such local party bickering and that last year led to the split-away of Djibo Kâ's Union pour le renouveau démocratique (URD). Following Mr Kâ's departure, the PS's spokesman, Abdourahim Agne, emerged as another potential dissident, with sharp criticisms of the party's handling of internal debate. So far, however, he has remained a prominent figure within the PS, confounding opposition hopes that he would precipitate another split. In late April he was placed in charge of a new party commission set up to review the devolution of power within the PS, suggesting that the party's political bureau may now be more willing to accommodate internal dissension in order to maintain party unity.

—and battles rumours of Mr Niasse's possible candidacy

In March-April some of the discontent with the current PS leadership seemed to congeal around Moustapha Niasse, a former "baron" of the ruling party who served for about ten years (in two separate tenures) as minister of foreign affairs, until his departure from the cabinet in July 1998. Mr Niasse himself made no public statements on his political plans, but several local PS leaders have resigned from their posts and declared they would support a bid by Mr Niasse for the presidency, as did a few local leaders from the URD. Dakar's cardinal, Hyacinthe Thiandoum, has declared his support for Mr Diouf's re-election, but has openly stated that he favoured Mr Niasse as his eventual successor, rather than Ousmane Tanor Dieng, the PS's secretary-general, who is currently considered the designated successor. However, PS leaders have vehemently denied that there was any foundation to the rumours of a possible candidacy by Mr Niasse. The issue became moot when Kofi Annan, the UN secretary-general, announced on April 6th that Mr Niasse had been named as his special envoy for the peace process in the Democratic Republic of Congo, thus taking him out of the domestic arena for the time being. It is quite possible, however, that Mr Niasse could eventually return as a political contender, especially if Mr Dieng continues to face difficulties within the party.

The URD rejects a common opposition campaign

The prospect that the various opposition parties may unite behind a common challenger to President Diouf was already dim before Mr Kâ announced in late March that the URD favoured a "plurality of candidates" in the upcoming election. This definitively ended the speculation that he might throw his support behind Abdoulaye Wade, the leader of the Parti démocratique sénégalais (PDS), the largest opposition party. In February several left-wing parties grouped together in a parliamentary bloc with the PDS announcing that they would support Mr Wade's candidacy, arguing that he had the best chance against Mr Diouf. Mr Kâ replied that the PDS leader had challenged Mr Diouf several times before, but with only limited appeal to voters. Mr Kâ argued that the sudden emergence of the URD in 1998 as a major new political force had broken the old bipolar competition between the PS and PDS and that the URD was therefore in a position to re-energise voters who had become tired of the two larger parties. Certainly, the URD's political rallies have demonstrated a degree of enthusiasm and party supporters have sometimes succeeded in capturing the spotlight by loudly heckling Mr Diouf and other PS leaders at some of their own rallies. However, supporters of the PDS and its allied parties remain deeply suspicious of Mr Kâ, a stalwart of the PS until only recently and minister of the interior when Mr Wade and other opposition leaders were jailed in 1994.

An outspoken general is removed as head of ONEL—

On March 13th Senegal's official election monitoring body, the Observatoire national des élections (ONEL), presented its report on the January senatorial election to President Diouf. Signed by the president of the ONEL, General Mamadou Niang, the report was highly critical of certain amendments to the electoral code pushed through by the government in late 1998, which it considered "incoherent and contradictory". It also listed the government's efforts to further reduce the ONEL's own limited mandate, including new restrictions that prevented the ONEL from enlisting independent observers to monitor voting in the senatorial election. Opposition parties generally welcomed the report as a vindication of their views on the election and most were inclined to suspect political motives when just three days later General Niang was named ambassador to Guinea-Bissau and thereby relieved of his position as head of the ONEL. Although General Niang himself would not be publicly drawn into such an interpretation, commentaries in the independent press noted his frequent rows with PS leaders, the minister of the interior and other officials.

—and is replaced by another general

On April 29th President Diouf appointed a new ONEL, headed again by a retired officer, General Amadou Abdoulaye Dieng. In addition to his military service, General Dieng has served at different points in his career as aide-de-camp to a former president, Léopold Sedar Senghor, ambassador to Zaire (now Democratic Republic of Congo), and as governor of Ziguinchor, during the height of the insurgency in Casamance. Opposition parties reserved judgment on him for the time being, but clearly did not expect him to be as independent-minded as his predecessor.

An opposition leader is condemned

The leader of the opposition Alliance pour le progrès et la justice/Jëf Jël, Talla Sylla, was in early March sentenced to a six-month prison term for "offending" President Diouf. The charge stemmed from a speech he gave during a meeting in Thiès in September, in which he suggested the possible need for armed insurrection if the PS and its leadership continued to "block the road" to democracy. While finding him guilty on that offence, the court, however, dismissed two other charges of disseminating false news and participating in an insurrectional movement. Since Mr Sylla had been in detention since mid-October, the time was counted toward his sentence and he was released on April 21st. He made no immediate announcement of his future political plans.

Soldiers stage a protest—

On April 8th more than a dozen uniformed soldiers and a large crowd of supporters blocked one of the major roads leading out of Dakar. The soldiers had just returned to Senegal after nearly a year's service with the UN peacekeeping mission in the Central African Republic. They complained that they had not been paid their special duty bonus, arguing that the only way to prompt the military command to pay serious attention to their demands was to stage such a protest. It was the first time soldiers have publicly demonstrated in Senegal, although there were reports that soldiers returning from Guinea-Bissau also had complained about slow bonus payments. Several officers eventually convinced the protest leaders to dismantle the barricades by promising that they would get paid as soon as possible. A statement by the Ministry of Armed Forces blamed the problem on delays in receiving the funds from the UN.

—and students go on strike—

For the first three weeks of March, classes were disrupted at the Université Cheikh Anta Diop in Dakar, the largest university in Senegal, as students went on strike and demonstrated for higher scholarships and other amenities. During the early days of the protest movement, groups of students attempted to march through the nearby streets of Dakar but were met by riot police, raising tensions even further. Eventually, the minister of national education, André Sonkho, agreed to raise the government's stipend to qualified students from CFAfr50,000 ($82) to CFAfr60,000, leading the students to call off the protests.

—amid festering local unrest

The increased authority accorded to local authorities through the government's policy of administrative and political decentralisation has also focused many immediate grievances against municipal officials. Among just a few of these disputes was a march on the police station in Ouakam in March to demand the release of nearly two dozen people from the nearby municipality of Ngor and a road block by 200 sand-truck drivers to protest against the mayor's decree of a new tax of CFAfr600 ($1) per truckload.

Economic policy

More privatisations are in the offing—

With the successful privatisation of the Société nationale sénégalaise d'électricité (SENELEC) in March (see Telecommunications) the government's reinvigorated privatisation programme is making progress on other companies.

- On February 17th the government issued an appeal for offers to purchase 51% of the capital of the Société nationale de commercialisation des oléagineaux du Sénégal (SONACOS), the state groundnut-processing company, which is Europe's foremost supplier of groundnut oil. The UK's HSBC Equator Bank has been awarded the contract to manage the financial aspects of SONACOS's privatisation.

- The government is drafting a bill to open the cotton parastatal, the Société de développement des fibres textiles (SODEFITEX), to greater private participation. According to the government-owned daily newspaper, *Le Soleil*, the bill envisages ceding 30% of the capital to farmers' associations, 10% to employees and 7.5% to private Senegalese investors (most likely textile enterprises). The bill would also set continued government shareholding at a maximum of 30%, thus leaving at least 22.5% for a "strategic" investor. The Compagnie française de développement des fibres textiles currently holds 20% of SODEFITEX's shares and the government holds the remainder.

—while others face new difficulties

- The divestiture of the troubled Société des transports du Cap-Vert (SOTRAC), the state bus company for the Dakar region, is once again in difficulty. In November 1998 the government announced that it would dissolve the enterprise and participate in the creation of a new transport company, Dakar-Bus, in partnership with the French Réseau autonome des transports parisiens (RATP) and other concerns. In March, however, RATP, which was to have acquired 33% of the new company, was obliged to withdraw from the deal, after the French finance ministry declined to approve the venture.

- In early April the government decided that the Société de développement de l'élevage dans la sylvo-pastorale (SODESP) would be dissolved, with some of its properties transferred to private concessions and others brought directly under the management of the agriculture ministry. SODESP, set up with donor support in 1975 to promote livestock production and assist the stockraisers' co-operative, was offered for sale in January 1997 but found no takers.

- At the beginning of April, workers at Dakar-Marine, the naval repair yard partially sold in January 1997 to Portuguese firm, Lisnave International, went on strike and staged protests to demand clarification of their employment status. Lisnave declared that it would take only 240 of the shipyard's 400 original employees, but has not yet published the list of names, nor even taken over effective management. Leaders of the Confédération nationale des travailleurs du Sénégal (CNTS) are pressing the government to ensure that the employees' social security, pensions and other benefits are safeguarded.

The economy

CFAfr60bn is allocated for the next agricultural season—

Speaking in mid-February at Senegal's first annual national farming day in Yenne, close to Dakar, President Abdou Diouf announced that the government would disburse some CFAfr60bn ($99m) in credits and investments to spur agricultural production during the 1999-2000 season. CFAfr36.8bn of this amount would be targeted specifically to food crop production, in the hopes of increasing output by around 11%. President Diouf also responded to some of the specific grievances presented to him by farmers' organisations and promised to ensure a successful outcome to the current negotiations with the World Bank to fund a reorganised Institut sénégalais de recherche agricole (ISRA; the state agricultural research agency). However, in response to farmers' demands for cancellation of CFAfr3bn in debt, Mr Diouf declared firmly that it would not be written off, although some payments may be rescheduled.

—and another CFAfr24bn is sought for farmers' organisations—

In early March the minister of agriculture, Robert Sagna, travelled to Washington for further talks with the World Bank to fund a major support programme for Senegalese agricultural services and producers' organisations. Talks initially began in 1997, when Senegal requested CFAfr33bn, but this has since been reduced to CFAfr24bn. One of the main goals of the programme will be to help increase the productive, technical and managerial capacities of producers' organisations in both agriculture and livestock raising. It will also include support for the re-organised ISRA and for the recently established Agence nationale de conseil agricole et rural, a joint public-private agricultural extension service.

—while artisanal fishermen are promised CFAfr2bn

Out of a total of CFAfr8bn being allocated in the budget for the fishing sector this year, some CFAfr2bn is specifically earmarked for small-scale, artisanal fishing, which supplies the bulk of Senegal's domestic market. The amount will be used principally for a revolving credit fund to support purchases of boats, motors and other equipment, as well as the development of ice-making facilities.

Energy

SENELEC is finally being privatised—

After months of controversy and confrontation with the electricity workers' unions, the government in early March signed an agreement selling 34% of the Société nationale sénégalaise d'électricité (SENELEC) to a Canadian-French partnership, which will take over management of the utility on a 25-year concession. The partnership of Canada's Hydro Québec International and Elyo, a subsidiary of France's Suez Lyonnaise des eaux, is to pay CFAfr42bn ($69m), split evenly between the two companies. The winning bid was apparently only slightly higher than that of Electricité de France. Two other potential buyers, South Africa's Eskom and Spain's Unión Fenosa, had dropped out during the technical bids. Hydro Québec is already present in a number of African countries and also plans to build a 37.4-mw generating plant in Senegal. The government is planning to sell a further 10% of the shares to the enterprise's employees and 15% to the public by the end of this year, leaving the state's ownership share at 41%. The government has also indicated that it will not take part in a decision to increase SENELEC's capital, thereby reducing its share even further.

—and the new management hopes to improve performance—

The director-general of Hydro Québec, Michel Clair, assured SENELEC employees that the new management was committed to expanding the enterprise's activities and would not cut back on its staffing levels. He added, however, that an exhaustive technical audit will be required before a detailed investment plan can be worked out to modernise SENELEC's ageing installations. Even under private ownership, SENELEC will continue to enjoy a monopoly on power distribution, although the production of electricity is now open to competition. The need for more generating capacity and greater efficiency in maintaining the flow of electricity has become critical, especially in light of the frequent power outages that have disrupted the economy in recent years. This was again highlighted in early April when a power blackout in Tambacounda led to rioting and the ransacking of SENELEC's local offices.

—while the unions' reaction is mixed

Beyond winning back the confidence of the general public, the immediate challenge facing SENELEC's new management will be to allay the suspicions and fears of the workers. Shortly after the announcement of the sale, the unions representing SENELEC workers issued a statement welcoming the government's choice of Hydro Québec, presumably for its no-lay-offs policy, but also more explicitly for its practice of encouraging union participation. However, the most powerful of the SENELEC unions, the radical Syndicat unique des travailleurs de l'électricité (SUTELEC), denounced the takeover of SENELEC's top management by outside companies as a return to "colonisation". In 1998 SUTELEC entered into a bruising fight with the government to block SENELEC's privatisation and the company is currently pursuing a civil suit against SUTELEC for CFAfr1bn in damages.

Industry

Sugar imports flood local markets—

Since January large quantities of cheap sugar have been imported into Senegal by small-scale importers and merchants. The private Compagnie sucrière sénégalaise (CSS), the sole domestic producer of sugar, described the imports as the most serious instance of dumping since the 1989 border skirmishes between Senegal and Mauritania. Most of the smuggled sugar has come from Mauritania, but also from Mali and The Gambia. The traffic in smuggled sugar has proved especially difficult to control—the border with Mauritania is easy to cross, many of the importers have kin in Mauritania and the customs service lacks the means to carry out effective patrols. Moreover, the decline in the world price of sugar provides illicit importers with a strong incentive, as they usually can sell the smuggled sugar at CFAfr275-350/kg ($0.45-0.58), while the CSS's varieties of sugar leave the factory at CFAfr420-450/kg.

—and threaten domestic production—

As a result, in the first quarter of 1999, CSS's production averaged only around 6,500 tonnes of sugar per month, compared with the usual 9,000 tonnes. Unless the situation improves, the company may not sell more than 70,000 tonnes this year, far below its production capacity of 100,000 tonnes, but also well short of its 85,000-tonne break-even point. Because sugar production in Senegal depends heavily on costly irrigation and Senegalese cane cutters earn more than in other producing countries in the region (several times higher than in Côte d'Ivoire, for example), there is little margin to reduce its prices against the competition. CSS has already warned that the company may have to cut back on its workforce, a prospect that deeply worries the local authorities in Richard-Toll—the company's headquarters—since the CSS is not only the main employer, with 20,000 permanent and seasonal workers, but also provides 60% of the municipality's recurrent budget through taxes. Given the alarming employment situation in the country as a whole, the government has also expressed concern, although its practical options remain limited.

—prompting a customs crackdown

This situation may have prompted Senegal's customs service to stage a series of raids in mid-March in marketplaces near the Senegal River bordering Mauritania, where it seized large quantities of goods believed to have been smuggled into the country. The raids led to tense confrontations, especially in Saint-Louis, and the following day, merchants organised a commercial shutdown of the city to protest against the raids. Normal business resumed soon after, as the customs service began to return seized goods to those merchants able to produce the required documentation for their products. However, the customs service warned merchants that it would monitor marketplaces more regularly and seize any illicit goods that it finds.

SOCAS falls short of its target

The Société des conserveries alimentaires du Sénégal (SOCAS), the country's main producer of canned tomato paste, expects that tomato production at the end of the 1998/99 agricultural season will reach some 25,000 tonnes, higher than the 21,000 tonnes of 1997/98, but still short of the projected target of 30,000 tonnes. Company officials attributed the shortfall to farmers' decisions to cultivate less of the crop than initially expected. SOCAS buys virtually the entire tomato crop, either directly for its own cannery or indirectly through the Société nationale de tomate industrielle, a state-owned enterprise that it currently manages and plans to buy. Unless more farmers can be encouraged to adopt the crop, SOCAS may have difficulty meeting its goal to process 50,000 tonnes by the end of next year.

A new cement plant is in the works

A partnership of Senegalese businessmen has secured commitments for part of the financing needed to establish a second cement factory in the country, in Bandia, to be called Ciments du Sahel. The total cost of the project is estimated at around $90m. The factory's annual capacity is 585,000 tonnes, with a permanent workforce of 250. Currently, the Société de commercialisation de ciment (SOCOCIM) operates an 850,000-tonne cement factory in Rufisque, although frequent power blackouts have kept it from operating at full capacity. Since the domestic and regional cement market is considered buoyant, there is a potential market for a second producer. SOCOCIM itself has been investing heavily in capacity expansion and expects to be able to produce up to 1.2m tonnes by June.

Telecommunications

The government's share in SONATEL is reduced further—

France-Télécom, which in 1997 bought one-third of the privatised telephone utility, the Société nationale des télécommunications (SONATEL), has increased its stake to 42% through a capital restructuring in mid-February. The government's share has simultaneously slightly declined to 30%. Some 10% of the shares are owned by SONATEL employees and the remainder by individual and institutional investors. By early April, the value of the SONATEL shares floated in September on the Bourse régionale des valeurs mobilières (BRVM) had risen to CFAfr28,890 ($48) each, from an initial value of CFAfr22,000.

—and competition comes to the mobile sector

In mid-April a new mobile phone company, Sentel, began operating in Dakar, providing the first real competition to SONATEL in the sector. Sentel is an affiliate of Millicom International Cellular, a Swedish-German company registered in Luxembourg that already operates 34 cellular phone networks, including in Ghana and Tanzania. SONATEL officials claim not to be worried, since mobile phone subscriptions have been growing rapidly, from 10,000 a year ago to 30,000 today. The current potential market in Senegal is estimated at around 100,000 subscriptions.

Foreign aid, trade and payments

Fish exports decline slightly

For the third consecutive year, Senegal's fish exports declined in 1998, falling by 3% on 1997 levels to 108,000 tonnes. Although exports to Europe and the Americas rose by around 7%, this was more than offset by a 28% fall in exports to Asia and an 11% fall to other African countries. Total earnings from fish exports should, however, slightly exceed the CFAfr165bn ($271m) received in 1997.

Aid news

- The International Fund for Agricultural Development (IFAD) will provide $8.2m for projects designed to combat desertification in the groundnut growing region east of Dakar.
- The Banque ouest-africaine de développement is to provide two concessional loans totalling CFAfr2.2bn ($3.6bn) for rural development and agroforestry projects.
- The European Investment Bank has announced a loan of Euro9m ($8m) to five Senegalese financial institutions to support lending programmes to small and medium-scale enterprises.

The Gambia

Political structure

Official name	The Republic of The Gambia
Form of state	Unitary republic
Legal system	Based on English common law and the 1996 constitution
National legislature	House of Assembly: installed on January 16th 1997 following its suspension after the military coup of July 1994; 49 members, 45 elected by universal suffrage, four nominated by the president; all serve a five-year term
National elections	September 1996 (presidential), January 1997 (legislative); next elections due September 2001 (presidential) and January 2002 (legislative)
Head of state	President, elected by universal suffrage for a five-year term
National government	The president and cabinet; last reshuffle January 1999
Main political parties	The ban on political activity was lifted in August 1996, but three pre-coup parties (the People's Progressive Party, the Gambia People's Party and the National Convention Party) remain proscribed. The ruling party is the Alliance for Patriotic Reorientation and Construction (APRC); the United Democratic Party (UDP) and the National Reconciliation Party (NRP) are the main opposition parties

	President & minister for defence	Yahyah Jammeh
	Vice-president & minister for health, social welfare & women's affairs	Isatou Njie Saidy
Key ministers	Agriculture	Fa Sainey Dumbya
	Civil service	Mustapha Wadda
	Culture & tourism	Susan Waffa-Ogoo
	Education	Thérèse Ndong Jatta
	External affairs	Lamine Sedat Jobe
	Finance & economic affairs	Famara Jatta
	Interior	Ousmane Badjie
	Justice & attorney-general	Fatou Bensouda
	Local government & lands	Lamin Kaba Bajo
	Presidential affairs, national assembly, civil service, fisheries & natural resources	Edward Singhateh
	Public works, communications & information	Sarjo Jallow
	Trade, industry & employment	Musa Sillah
	Youth & sports & religious affairs	Yankuba Touray
Central Bank governor	Clarke Bajo	

Economic structure

Latest available figures

Economic indicators	1994	1995	1996	1997	1998[a]
GDP at market prices (D m)	3,411[b]	3,439[b]	3,725[b]	3,922[b]	4,251
Real GDP growth (%)	1.3[b]	–3.4[b]	5.3[b]	5.4	4.8
Consumer price inflation (%)	1.7	7.0	1.1	2.8	1.0[c]
Population (m)	1.08	1.11	1.14	1.17	1.20
Exports fob ($ m)	125[b]	123[b]	119[b]	120[b]	n/a
Imports fob ($ m)	182[b]	163[b]	217[b]	207[b]	n/a
Current-account balance ($ m)	8[b]	–8[b]	–48[b]	–24[b]	n/a
Reserves excl gold ($ m)	98	106	102	96	106[c]
Total external debt ($ m)	425	425	452	422	n/a
External debt-service ratio (%)	14.1	14.7	12.7	n/a	n/a
Groundnut production ('000 tonnes)	65.4[b]	79.7[b]	78.8[b]	68.1[b]	n/a
Charter tourists ('000)	90.0[b]	42.9[b]	72.1[b]	75.9[b]	92.4[c]
Exchange rate (av; D:$)	9.58	9.55	9.78	10.20	10.64[c]

May 7th 1999 D11.30:$1

Origins of gross domestic product 1997	% of total
Agriculture	23
Industry	13
Services	64
GDP at factor cost	100

Components of gross domestic product 1997	% of total
Private consumption	77
Government consumption	17
Gross domestic investment	20
Exports of goods & services	46
Imports of goods & services	–60
GDP at market prices	100

Principal exports 1997[b]	$ m
Groundnuts (shelled)	5.6
Fish & fish preparations	2.6

Principal imports 1997[b]	$ m
Food	57.2
Manufactures	47.8
Machinery & transport equipment	37.2
Minerals & fuel	28.3

Main destinations of exports 1997[d]	% of total
Belgium-Luxembourg	78.0
Japan	4.5
UK	3.2
France	1.9
China (incl Hong Kong)	1.9

Main origins of imports 1997[d]	% of total
China (incl Hong Kong)	25.1
UK	10.4
Netherlands	7.4
Côte d'Ivoire	7.0
France	5.8

[a] EIU estimates, calendar year. [b] Fiscal years ending June 30th. [c] Actual. [d] Derived from partners' trade returns, subject to a wide margin of error.

Outlook for 1999-2000

President Jammeh will be challenged by the opposition—

The democratic credentials of the president, Lieutenant-Colonel Yahyah Jammeh and his military-backed regime will be tested by the increasing political audacity of opposition leaders. The more articulate of these leaders, most prominently Ousainou Darboe, a respected lawyer who leads the United Democratic Party (UDP), seems to be prepared to challenge the president with increasingly daring speeches. Mr Darboe is presenting himself as the champion of Gambian democracy, while portraying President Jammeh's regime as dictatorial, inefficient, and repressive, accusing the colonel of cronyism and mismanagement, most recently over the rising price of the staple food, rice. Other opponents of the government are growing equally provocative, virtually accusing the president of supporting the Casamance rebellion in neighbouring Senegal. President Jammeh is likely to be tested further by the boldness of his political opponents, increasing the likelihood that he will take some drastic action against them.

—but will build on the support of young people

At the same time, Colonel Jammeh and the circle of junior officers who seized power with him in 1994—when most of them were still in their twenties—will concentrate on boosting their popularity with young Gambians (half the population is under the age of 15). Mr Darboe and fellow opposition leaders largely speak for the generation of Gambians who grew up in the relatively liberal era of the former president, Sir Dawda Jawara. In contrast, the youthful image of the ruling Alliance for Patriotic Reorientation and Construction (APRC) has a strong appeal and Colonel Jammeh frequently addresses “the youth”. He often revisits denunciations of the alleged corruption, sleaze and immorality of the Jawara era, which he contrasts with the APRC's “Vision 2020” programme of economic and social development.

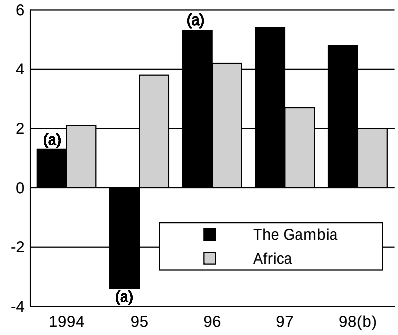
“Vision 2020” will guide economic policy—

The “Vision 2020” programme has been much modified as a result of successive negotiations with the country's donors. It has become a more realistic set of economic policies backed by the IMF and World Bank and supported by other important donors. The UN-backed poverty alleviation programme agreed in Geneva last year has largely been integrated into ”Vision 2020”, which may attract new funding, as donors grow more confident about the government's ability to implement the programme. The “Gateway” project, which is based on the previous government's plan for a sub-regional trading entrepôt in Banjul, now seems to have the blessing of the World Bank. The government thus has a credible medium- to long-term economic development programme and it hopes to attract a strong inflow of international funding and private investment.

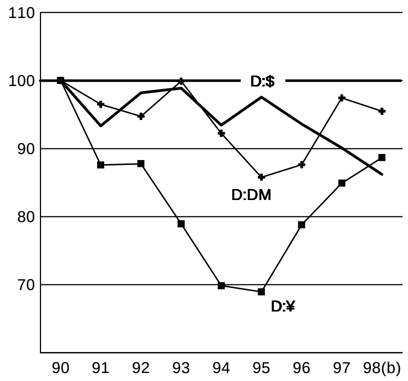
—but growth should remain subdued

The strong inflow of concessional funding in support of the poverty reduction programme and “Vision 2020” has prompted the government to assert that real GDP growth of 6.5% is feasible in 1999. However, the continuing poor state of the groundnut sector, once The Gambia's prime foreign-exchange earner, means that officially recorded export revenues will remain depressed. Tourism, however, which has been slow to recover from Colonel Jammeh's 1994 coup, will consolidate its position as the country's largest source of foreign exchange. Tourist arrivals totalled over 92,000 in the 1997/98 season, which suggests that a figure of 100,000-120,000 tourists a year should again be attainable in 1999/2000, provided that the political situation remains favourable. The colonel's call for an increase in foreign direct investment (FDI) also depends on the maintenance of political stability. As this remains far from certain, the EIU sees no reason to expect that the IMF forecast of 4% per year in 1999-2000 can be exceeded.

The Gambia: gross domestic product
% change, year on year



The Gambia: dalasi real exchange rate (c)
1980=100



(a) Fiscal years ending June 30th. (b) EIU estimates. (c) Nominal exchange rates adjusted for changes in relative consumer prices.
Sources: EIU; IMF, *International Financial Statistics.*

Review

The political scene

Mr Darboe again challenges the government—

The leader of the United Democratic Party (UDP), Ousainou Darboe, has mounted a succession of defiant attacks on President Yahyah Jammeh and his ruling Alliance for Patriotic Reorientation and Construction (APRC), despite the risk of official reprisals. At a UDP rally on March 13th, Mr Darboe alleged that 80 young Gambians had been flown to Libya for special training, to be then integrated into the Gambian security forces on their return and used in intimidating voters at the next election, due in 2001. He also denounced the use of President Jammeh's state guards to carry out police business and called on the government to improve the effectiveness of the regular police force in fighting crime. He warned the government that neither "Pinochet-style rule" nor "a Libyan revolution" would be tolerated in The Gambia. Mr Darboe, a lawyer who stood unsuccessfully against Colonel Jammeh in the dubious 1996 presidential election (4th quarter 1996, pages 23-27), is widely considered to be The Gambia's most effective opposition leader. Both Mr Darboe and the UDP's deputy secretary-general, Lamin Waa Juwara, have already suffered at the hands of the authorities over the past year (1st quarter 1999, page 29).

—which points to wider public discontent

Speaking at the same rally, Mr Juwara expressed farmers' sentiments that they had been the real victims of the coup mounted by Mr Jammeh against the former president, Sir Dawda. According to Mr Juwara, village producers felt neglected by the new regime, which purchased their groundnut crops late, whereas Sir Dawda's government allegedly purchased the crops at the promised time. Mr Juwara said that farmers had withdrawn from Mr Jammeh's "dictatorial regime" and claimed that the APRC had been forced to cancel a recent rally in a rural area because of farmers' hostility. Other UDP speakers at the same rally alleged that rebels from the neighbouring Senegalese province of Casamance were being allowed to settle on the Gambian side of the border, using the area as a rear-base. The Gambian government has repeatedly dismissed claims in the Senegalese press that it is supporting the Casamançais rebels, although Colonel Jammeh is a member of the Diola, a small minority in The Gambia, but numerous in Casamance where it forms the core of the rebellion (1st quarter 1999, page 30).

President Jammeh sacks a top army officer

On March 20th Colonel Jammeh summarily dismissed the army's chief operations officer, Lieutenant-Colonel Pa Modou Ann, on grounds of insubordination, following his alleged refusal to accompany the Gambian contingent being sent to Guinea-Bissau as part of a West African peacekeeping force (1st quarter 1999, pages 29-30). Lieutenant-Colonel Ann was an experienced officer who had served with Gambian peacekeeping contingents in Liberia. According to a London-based newsletter, *Africa Analysis*, his sacking followed criticism levelled against him by a senior Nigerian officer during the visit to Banjul by the outgoing Nigerian head of state, General Abdusalami Abubakar, in February (1st quarter 1999, page 31). His sacking was also said to be evidence of Colonel Jammeh's sycophantic attitude towards the Nigerian leadership.

A leading figure in the former regime is exonerated

The minister of the interior under Sir Dawda, Lamin Kiti Jabang, was officially informed in mid-March that his assets and bank accounts, frozen since July 1994 (2nd quarter 1995, page 21), were being returned to him. Mr Jabang was one of several former ministers investigated by a Commission of Enquiry into Public Assets and Properties established by the new government, but he was found to be innocent of all allegations of fraudulent or corrupt practices. Mr Jabang was even commended by the commission for having paid all his taxes. According to the *Daily Observer*, the only concession the former minister had received from the government in 24 years in public office had been a plot of land.

The president wins new aid promises from Cuba

President Jammeh returned home from a five-day visit to Cuba on April 9th, after talks with President Fidel Castro and Cuban officials. Cuba, which sent a medical team to The Gambia in 1996, pledged to send another team of 100 doctors to help staff the country's health service and to provide teaching staff for a planned medical school at the new national university, whose establishment has been criticised by the UDP. In his speech on May 13th, Mr Darboe criticised government plans for the university, citing the poor state of school education, which needed proper funding first. According to Mr Darboe, recent college and school protests demonstrated that the government could not afford to meet its present obligations within the education sector, let alone afford to found a university.

Economic policy

President Jammeh calls for wider private-sector participation—

In his speech at the opening of the House of Assembly (parliament) on March 4th, President Yahyah Jammeh called for increased participation by the private sector in all areas of the Gambian economy. He focused on the revival of the tourism sector since his coup in 1994, adding that the number of tourists increased by 18% to 92,414 from 1997/98 to 1998/99. President Jammeh called on private-sector operators to take advantage of tourism's rapid growth and to invest more, especially in eco-tourism, a sector of the industry that the government has long sought to develop, without great success so far. In addition, President Jammeh said that the government was talking to industry stakeholders about ways of altering the nature of the present all-inclusive tourist packages, which are often disadvantageous to local businesses.

—as "Vision 2020" takes shape

Details for The Gambia Trade Gateway Project, under the government's "Vision 2020" development programme (4th quarter 1998, pages 27-29), have recently become available. The World Bank has apparently been in discussion with the government about the project, which would involve a mix of public- and private-sector investment, and which is based on four separate projects:

- the development of a free port at Banjul, with concentration on the storage and warehousing of goods for transshipment within the region;
- the creation of an export processing zone (EPZ) with pre-built industrial units for lease to companies exporting up to 90% of their output;
- the creation of a special economic zone near Banjul airport and at sites along the Banjul-Serrekunda highway, for development of industrial, commercial, agro-processing, and other businesses reliant on air transport;
- the formation of a new company, Teleport, which would provide commercially affordable information processing services.

Poverty reduction receives a boost from the World Bank—

The government's poverty reduction programme, backed by the UN Development Programme (UNDP) and approved by a roundtable of donors in Geneva in July 1998 (3rd quarter 1998, page 29), has received new funding from the World Bank's soft-loan arm, the International Development Association (IDA). The IDA is to provide $15m to tackle urban poverty. The specific objectives of the projects are to improve public infrastructure; to alleviate poverty through the creation of temporary jobs and improvements to the selection of small to medium-size investments; and to strengthen the technical and managerial capacity of local authorities, local private firms, and Gamworks (the specialised agency to which beneficiaries will delegate the management of contracts).

—and UNICEF—

A five-year plan aimed at improving services for women and children, with a bearing on the poverty reduction programme, was signed in March in Banjul between the government and the UN Children's Fund, UNICEF. UNICEF has approved $3.6m from general resources and $5m in supplementary funds for the plan. The main objectives of the plan are to reduce by 2003 the infant mortality rate and the under-five mortality rate to 80 per 1,000 live births; to reduce the maternal mortality rate by 20%; to reduce by half malnutrition rates in children; to reduce female illiteracy rates by 10%; to increase gross primary school enrolment to 75%; and to reduce access gaps in safe water and environmental sanitation by 50% and 30% respectively.

—but the ESAF may have run into difficulties

According to an unconfirmed report, an IMF mission which visited in February has recommended delaying the next tranche of The Gambia's three-year loan agreed under the enhanced structural adjustment facility (ESAF) in June 1998 (3rd quarter 1998, pages 28-29). The mission was said to be dissatisfied with elements of the privatisation programme, the slow pace of fiscal and administrative reform, and allegations of financial irregularities involving The Gambia Groundnut Corporation.

The economy

The government intervenes in the rice market—

In his speech before parliament, President Yahyah Jammeh said that the government viewed the rise in rice prices, the nation's staple food, with concern and would take appropriate steps to ensure the establishment of a fair and equitable pricing structure, as well as ensuring the high quality of all imported commodities. The United Democratic Party (UDP) leader has recently challenged the government on rice prices, saying that the price of rice had reached a record D200 ($18) a bag, from D145 when President Jammeh came to power in 1994. Ousainou Darboe accused the president of using the import of rice as a political weapon and attempting to discredit long-established rice traders in order to allocate rice-importing concessions to his supporters. Local commentators have urged the establishment of a price control board, as well as measures to encourage increased private-sector investment in local rice cultivation.

—but this causes confusion

President Jammeh promised to bring the retail price of rice below the emotive D200/bag level, but traders were confused when lower prices were announced on March 16th. President Jammeh was said to have stipulated a retail price of D175/bag in Banjul and D170/bag in the rest of the country. He failed to clarify whether this related to government imports or to rice bags currently sold by traders, which by this time were retailing at D220-225/bag. Traders complained that the new price meant that their existing stocks would be sold at a loss, as they already had to pay, on top of the new wholesale price, about 15% in taxes, in addition to the cost of transportation from the docks.

Transport

Air Dabia is in trouble

On March 1st The Gambian High Court ordered the continued detention of two planes belonging to Air Dabia, the Banjul-based airline owned by a Malian businessman, Babany Cissoko. This followed complaints from the airline's staff that salary arrears totalling some D9m ($800,000) remained unpaid. The planes were seized by the police in early February and a Gambian judge threatened to impound two additional planes if Mr Cissoko failed to meet other outstanding debts. Mr Cissoko is also said to owe $700,000 to the local Mitsubishi dealership, T.K. Motors, and $62,000 to a Gambian construction company. An international warrant for his arrest on an apparently unrelated fraud charge was recently issued in Dubai, United Arab Emirates.

A Banjul-Dakar ferry link is established

A weekly ferry service between the Gambian and Senegalese capitals is due to commence before mid-1999, using a Senegalese-owned ferry, which is also in service between Dakar and the Senegalese inland river port of Ziguinchor, the capital of Casamance. The service forms part of the government's "Vision 2020" programme, which seeks to improve transport ties between The Gambia and its neighbour.

Aid news

- The International Fund for Agricultural Development (IFAD) signed a $9.2m loan agreement with the government in early March to support rural finance and community initiatives project, as part of the poverty reduction programme. According to IFAD, the project is mainly to provide access to finance to 25,000 rural households and to expand the village-based savings and credit associations network from 37 to 80 associations.

- The Agence française de développement (AFD) announced in March that it would grant D11m ($930,000) in support of the programme's food security, micro-credit and environmental protection elements, via non-governmental organisations.

- The European Commission (EC) approved in March D6.3m ($530,000) worth of funding for a contract to supply and install 11 photovoltaic solar pumping units. The contract has been awarded to Siemens Solar of Germany. The EU has already provided 50 solar-powered piped water supply systems throughout The Gambia, at a total cost of D70m.

- A foundry funded by the Turkish aid programme is nearing completion at the Gambia Technical Training Institute (GTTI). Turkey provided D9.2m for the project and the Gambian government, D3.2m. Aside from its use in training, the foundry will promote existing metal industries by providing commercial quality castings at reasonable prices for use in the local manufacture of simple equipment for agriculture and industry.

Mauritania

Political structure

Official name	République Islamique de Mauritanie
Form of state	Arab and African Islamic republic
Legal system	Strongly influenced by the sharia (Islamic law), based on the 1991 constitution
National legislature	Bicameral National Assembly, consists of an upper house with 56 senators and a lower house with 79 deputies
National elections	October 1996 (legislative); December 1997 (presidential); next elections due in October 2001 (legislative) and December 2003 (presidential)
Head of state	President, elected for a renewable six-year term; currently Maaouya Ould Sid'Ahmed Taya, re-elected in December 1997
National government	The president and his appointed Council of Ministers; last reshuffle November 1998
Main political parties	22 political parties are registered, the foremost of which are: Parti républicain démocratique et social (PRDS, ruling party); Action pour le changement (AC); Rassemblement pour la démocratie et l'unité (RDU); Union des forces démocratiques (UFD—now split into factions); Union pour la démocratie et le progrès (UDP)

	President	Maaouya Ould Sid'Ahmed Taya
	Prime minister	Cheikh El Avia Ould Mohamed Kouna
Key ministers	Civil service, labour, youth & sports	Baba Ould Sidi
	Culture & Islamic affairs	Isselmou Ould Sid'El Moustaph
	Defence	Kaba Ould Elewa
	Education	Sghair Ould M'Bareck
	Equipment & transport	N'Gaïde Lamine Kayou
	Finance	Camara Aly Gueludio
	Fisheries & maritime economy	Mohamed El Moctar Ould Zamel
	Foreign affairs & co-operation	Ahmed Oud Sid'Ahmed
	Information & relations with parliament	Rachid Ould Saleh
	Interior, posts & telecommunications	Dah Ould Abdel Jalil
	Justice	Mohamed Lemine Ould Ahmed
	Mines & industry	Isagh Ould Rajel
	Planning	Sid'El Moctar Ould Naji
	Rural development & environment	Colonel Mohamed Ould Sid'Ahmed Lekhal
	Trade, crafts & tourism	Ahamdi Ould Hamady
	Water & energy	Mohamed Salem Ould Merzoug
Central Bank governor	Mahfoud Ould Mohamed Ali	

Economic structure

Latest available figures

Economic indicators	1994	1995	1996	1997	1998[a]
GDP at market prices (UM bn)	124.2	137.3	150.1	166.7	174.1[b]
Real GDP growth (%)	4.6	4.6	4.7	4.9	6.8[b]
Consumer price inflation (av; %)	4.1	6.6	4.7	4.6	9.8[b]
Population (m)	2.21	2.28	2.35	2.39	2.42
Exports fob ($ m)	398	476	448	425[b]	n/a
Imports fob ($ m)	352	293	433	444[a]	n/a
Current-account balance ($ m)	–70	22	–62	–24[b]	n/a
Reserves excl gold ($ m)	40	86	141	201	203[c]
Total external debt ($ m)	2,193	2,320	2,363	2,410[b]	n/a
External debt-service ratio (%)	24.3	22.4	21.7	17.5[b]	n/a
Iron-ore exports ('000 tonnes)	10,342	11,514	11,158	11,689	n/a
Fisheries exports ('000 tonnes)	196	287	366	198	183[b]
Exchange rate (av; UM:$)	123.6	129.8	137.2	151.7	189.0[a]

May 7th 1999 UM206.86:$1

Origins of gross domestic product 1997	% of total
Agriculture & fishing	24.7
Manufacturing	10.9
Mining	10.7
Construction	9.5
Services & others	44.1
GDP at factor cost	100.0

Components of gross domestic product 1997	% of total
Private consumption	78.0
Public consumption	13.4
Gross fixed investment	17.5
Exports of goods & services	39.6
Imports of goods & services	–48.6
GDP at market prices	100.0

Principal exports (fob) 1997	% of total
Iron ore	52.4
Fish & fish products	47.6

Principal imports 1996	$ m
Energy & mineral products	129.0
Food & agricultural products	116.0
Machinery & equipment	67.0
Consumer goods	22.0

Main destinations of exports 1997	% of total
Japan	23.9
Italy	17.0
France	14.3
Spain	8.5

Main origins of imports 1997	% of total
France	25.9
Spain	7.7
Germany	6.8
Belgium-Luxembourg	6.7

[a] Official estimates. [b] EIU estimate. [c] Actual.

Outlook for 1999-2000

The government will appease the opposition

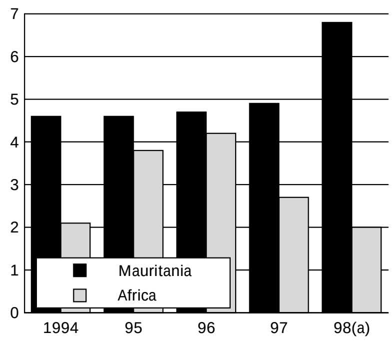
The revelation earlier this year that the results of the local government elections in January 1999 had been massaged came as no surprise to many Mauritanians. However, few expected that President Maaouya Ould Sid'Ahmed Taya would ask his government to review the election procedures to prevent a recurrence of fraud and, furthermore, that he would consult with leaders of the opposition parties that participated in the elections before suggesting specific measures. This would represent a considerable shift in the president's leadership style. Even more radical opposition members, such as Ahmed Ould Daddah of the Union des forces démocratiques (UDF), said that they would be prepared to enter into a "meaningful" dialogue with the ruling Parti républicain démocratique et social (PRDS).

The government may also have been prompted by a more assertive judiciary, as highlighted by the acquittal of Mr Ould Daddah in March of dubious public order charges. For many, the outcome demonstrates the increasing independence of the judiciary and is further evidence of progress towards democratisation in Mauritania. The court case has provided a golden opportunity for the opposition to air its views and criticism and did little to reverse the regime's tarnished reputation for intolerance and repression.

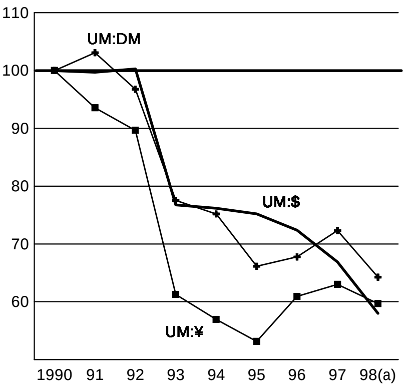
Growth will remain subdued

Mauritania will be hard pressed to meet the government's export revenue targets in 1999-2000. Strenuous efforts have been made to increase iron production, Mauritania's major export earner, by upgrading facilities at the ore mining company, the Société nationale industrielle et minière (SNIM). However, world prices have fallen as fast as progress has been made, owing to the global economic downturn. Fish exports, Mauritania's other major revenue earner, are also struggling owing to reduced world demand. In addition, efforts to rationalise and modernise the sector seem to have failed to produce the desired effect and export earnings are not likely to increase substantially in the near future. As a result, real GDP growth should remain subdued in 1999-2000.

Mauritania: gross domestic product
% change, year on year



Mauritania: ouguiya real exchange rate (b)
1990=100



(a) EIU estimates. (b) Nominal exchange rates adjusted for changes in relative consumer prices.
Sources: EIU; IMF, *International Financial Statistics*.

Review

The political scene

President Ould Taya orders a review of the electoral system

Widespread fraud during the municipal elections in January (1st quarter 1999, page 41) prompted the president, Maaouya Ould Sid'Ahmed Taya, to ask his government in March to review the electoral procedures. The elections were annulled in Nouakchott and in two rural communities because of multiple voting, possibly in part because of inadequate security regarding identity documents. The opposition, which refused to participate in the elections, has long complained about the deficiencies of the system leaving wide space for possibilities of fraud. President Ould Taya asked the government to provide citizens with identity cards that could not be easily counterfeited and to draw up electoral lists based on the last administrative census. The Council of Ministers was swift to react and before the end of March it announced that it had ordered the issuing of new voting and identity cards.

Mr Ould Daddah is acquitted

In late March a Nouakchott court acquitted two opposition leaders, Ahmed Ould Daddah and Mohamedden Ould Babah, respectively head and executive member of the Union des forces démocratiques (UFD), of charges of inciting acts likely to breach public order and destabilising the state. The trial followed opposition calls for an enquiry into allegations, published in the Moroccan press last November, that the government had signed a secret agreement with Israel allowing the disposal of nuclear waste in the Mauritanian desert (see below). The prosecution earlier dropped cases against two other activists also taken into custody last December. All those arrested spent one month under house arrest before being conditionally released in mid-January (1st quarter 1999, page 42).

The public prosecutor said that the two men had taken advantage of a climate of "peace and democracy" in Mauritania to foment trouble and demanded two-year suspended jail sentences with fines of UM600,000 ($2,900). The defence argument stressed the weakness of the prosecution case and noted several irregularities in the judicial process (including the taping of Mr Ould Daddah's phone conversations), which swayed the judges. The case provided a boon for the legal profession in Mauritania, as the defence team was made up of some 70 lawyers, including representatives from France and elsewhere in Africa. Some of the court hearings were marathon sessions, lasting more than 24 hours.

***Le Calame* is banned again**

An independent magazine, *Le Calame*, was banned from publication for a period of three months starting early April. No official reason was given, but the interdiction came presumably because of the paper's reporting on the nuclear waste issue. In mid-April a report in an Israeli newspaper, *Ma'ariv*, cited Israel's representative in Mauritania. He said that *Le Calame* was censured because it reported that Israel had paid Mauritania about $20m to bury Israeli nuclear waste inside Mauritanian territory and that Israel's representative was the person responsible for closing the deal. The Israeli diplomat declined to comment on the report. This is the third time since 1994 that the paper has got into trouble with the authorities. The closure of *Le Calame* follows the seizure a couple of weeks earlier of an issue of *l'Éveil Hebdo* (and of an Arabic version of *Le Calame*).

Mauritanian "Afghans" are arrested

Security forces rounded up several Mauritanian "Afghans" in early March, some on charges of having contacts with Osama bin Laden, a Saudi businessman sought by the US for the bombing of US embassies in Kenya and Tanzania in August 1998. The detainees spent several years fighting in Afghanistan and returned to Mauritania at the end of 1997. Little information was made available by the authorities, but the men are accused of setting up militia training camps and of engaging in illegal arms traffic in the border areas between Mali, Mauritania and Algeria.

The men were apparently arrested as the result of information received from US intelligence sources. The Mauritanian police force is said to be seeking other people believed to be acting on orders received from Afghanistan and Sudan to carry out acts of sabotage against Western interests in Mauritania. Unconfirmed reports say the accused were also planning to bring Mr bin Laden to West Africa. It is feared that the sale of arms may turn into the formation of groups that could attack US or Israeli targets in Mauritania and the region. The already tight security around the US embassy and the Israeli interests section in Nouakchott has been strengthened as a result.

FLAM holds a congress

The clandestine black Mauritanian movement, Forces de libération africaines de Mauritanie (FLAM), held a congress in March at an unknown location, following which a declaration was released calling for autonomy of the southern part of Mauritania. According to FLAM, only such a move would allow the smoothing of racial tensions and avoid a futile civil war. FLAM, reportedly based in Senegal, was created in 1983 to fight the exclusion of black Mauritanians from public affairs, the generalisation of Arabic as the national language and the affirmation of an exclusively Arab character in Mauritania. FLAM accused President Ould Taya of "crimes against humanity", following the deaths of hundreds of black Mauritanians during racial clashes in 1989 and 1991. The movement also called for the return of an estimated 60,000 black Mauritanian refugees still living in Senegal, after being forced into exile in 1989.

Education reform is adopted

Further changes to the education system will shortly be introduced following the approval of a new law presented to parliament in mid-April. The law aims to standardise the educational system for all pupils. Arabic is to be the exclusive language of instruction in the first year of primary education. French will be taught from the second year and will be used to teach science subjects. English will be taught at the secondary level, while other national languages (Pulaar, Soninké and Wolof) will be taught at the university level only. Other innovations include the extension of the first level of secondary education to four years instead of three, placing greater emphasis on scientific subjects and the establishment of regional centres for intermediate vocational training, reflecting the government's worries about the high rate of dropouts at the secondary level. The changes have failed to satisfy Arab nationalists, critical of the use of French, or black Mauritanians, who perceive it as further evidence of a creeping "Arabisation" of a system that implicitly favours native Arab speakers.

Relations deteriorate with Morocco—

The general secretary of the Mauritanian Ministry of Foreign Affairs provoked a strong reaction from Morocco when, at a meeting of the foreign ministers of the Organisation of African Unity (OAU) in Addis Ababa in late March, he rejected a re-examination of the OAU's recognition of the Sahrawi Arab Democratic Republic (RASD)—the government-in-exile of the Western Sahara, occupied since 1975 by Morocco. The Moroccan government expressed disappointment at the Mauritanian attitude, while the Moroccan press claimed that Mauritania had "overtly" adopted the "separatist" cause. Mauritania occupied the southern portion of the Western Sahara in 1975, but withdrew in 1979, when the burden of fighting a war against the Sahrawis became too heavy.

—but improve with Mali—

The Malian president, Alpha Oumar Konaré, visited his Mauritanian counterpart in late March for discussions regarding security in the border region between the two countries. Armed bands, based in Mali, have on several occasions mounted raids in Mauritania to seize cattle and goods. An attack was also made in January on the Paris-Dakar rally (1st quarter 1999, page 45). Both leaders appeared satisfied with efforts to put a stop to such activities. President Ould Taya added that tenders had been prepared for the construction of a road from Aioun-el-Atrouss (Mauritania) to Kayes (Mali), which, once completed, would boost trade between the two countries. In addition, landlocked Mali was invited to build warehouses in the port of Nouakchott.

—and Tunisia

The Tunisian prime minister, Hamed Al Karaoui, met his Mauritanian counterpart and members of the government in late April and signed a number of agreements aimed at strengthening co-operation between the two countries. Regional co-operation was also high on the agenda and the government heads noted there was "urgent" need to revamp the Maghreb Arab Union (AMU) to promote economic integration among the five countries of the union (Algeria, Libya, Morocco, Mauritania and Tunisia). It was hoped that the resolution of the Lockerbie bombing affair and the lifting of economic sanctions by the UN against Libya would pave the way for strengthening the AMU. The 10-year-old AMU has been beset by problems since its inception, notably with disagreement between Morocco and Algeria regarding Western Sahara and the exclusion of Libya from international forums owing to the UN embargo.

Mauritania is to participate in a regional intervention force

Mauritania will join seven West African French-speaking countries (Benin, Burkina Faso, Côte d'Ivoire, Mali, Niger, Senegal and Togo) in a regional peacekeeping force. An agreement was signed to this effect in late April during a meeting of military representatives in Dakar. All eight countries are members of the Accord de non-agression et d'assistance en matière de défense (ANAD), established in 1977 to maintain peace and security in the region. It was also decided at the meeting to establish a fund to run the ANAD force, which will have its headquarters in Abidjan (Côte d'Ivoire). ANAD is not noted for its dynamism and has intervened only once to resolve an inter-state conflict (between Burkina Faso and Mali in January 1986). Most ANAD members have, however, been absent from (if not politically opposed to) the Economic Community of West Africa Monitoring Group (Ecomog) peacekeeping force in its interventions in Liberia and Sierra Leone. If the agreement translates into reality, the peacekeeping force will be widely seen as a Francophone counterweight to the Nigeria-dominated Ecomog.

Economic policy

The World Bank criticises AMEXTIPE

A World Bank staff mission to Mauritania in November 1998, which was critical of the operation of the Agence mauritanienne d'exécution des travaux d'intérêt public pour l'emploi (AMEXTIPE), has led to the replacement of the head of the organisation, which also underwent administrative changes in early March. AMEXTIPE is considered the "flagship" of Mauritania's anti-poverty programme and was set up to manage small employment-generating projects. However, AMEXTIPE has failed to perform as hoped. Contracts executed by the agency, which has the status of a non-governmental organisation (NGO), are not subject to the same regulations as those applying to government ministries, particularly the public works ministry. As a result, private entrepreneurs have complained that not only did AMEXTIPE recognise businesses that were not eligible to compete for government contracts, but also that some ministries preferred to tender through the agency, rather than use the more complicated official procedures.

The privatisation programme proceeds

A call for a feasibility study for the privatisation of the Office des postes et telecommunications (OPT) was launched in mid-February. The study is expected to be concluded by the end of the year. The government has already received parliamentary approval for separation of the OPT into two distinct units, one managing telecommunications and the other traditional postal services. The separation was deemed necessary given the global trend towards separating the two entities and also by the relative results of the two parts of the OPT. In 1997 the postal service recorded a loss of UM447m ($2m) whereas the telecommunications service posted a profit of UM1.5bn.

The economy

Inflation falls further

Year-on-year inflation fell to 4.8% in February 1999, according to the Office national de la statistique (ONS). The main reason for the decline was a fall in the price of food in January after the end of Ramadan (when food prices are traditionally higher). Prices of other items, notably clothing, increased slightly in February. The official picture of falling inflation was, however, slightly clouded by a report, in *L'Essor*, a local journal on economic affairs, which claimed that the monthly cost of providing for a family of eight (excluding housing) had risen from UM32,520 ($157) in 1997 to UM49,700 in 1999, an increase of over 50%. According to the report, there was a 100% increase in the cost of transport and 40-50% increases in prices for basic foods.

Agriculture & fishing

Mauritania appeals for food aid—

In mid-April the minister of rural development and the environment, Colonel Mohamed Ould Sid'Ahmed Lekhal, launched an urgent appeal for international aid to make up an estimated food deficit of 71,000 tonnes of cereals in

1999. Speaking after a meeting of the Food Security Committee with donor organisations, he explained that despite an improvement in harvests from irrigated crops, yields continued to underperform and that the consequences could be serious in certain parts of the country. The new estimate provided by the ministry is more than double the aid requirement foreseen by the UN Food and Agriculture Organisation (FAO) in its analysis of trends in Mauritania (1st quarter 1999, page 47).

—and assistance trickles in

Mauritania already benefits from a $23m emergency multi-country food aid programme launched by the UN World Food Programme in mid-March. The programme will provide 40,000 tonnes of emergency food relief for people facing severe shortages in Mauritania, Senegal, The Gambia and Cape Verde. In addition, Japan has offered ¥300m ($2.5m) for the purchase of Japanese rice as part of its food aid programme for Mauritania, while France has provided 3,000 tonnes of wheat, valued at $850,000. The wheat will be sold through designated outlets, with the counterpart funds being used to promote poverty alleviation projects.

A fish sale is revoked

The sale in January by the Société mauritanienne de commercialisation de poisson (SMCP; the fish marketing company) of 1,500 tonnes of fish to European purchasers at an extremely favourable price ($800-1,000/t) was cancelled following complaints by fish suppliers, who accused the director of the company of acting against their interests. New offers were made by purchasers and the fish was eventually sold at a price roughly 10% higher than that originally agreed. Although the financial gain is negligible, owing to the cost of storage of the fish for the additional time, it has encouraged further examination of the mechanism for marketing fish, the country's major foreign-exchange earner. SMCP agreed that there was an urgent need to reform the system of selling fish and called for a study of the sector to identify ways of reducing bureaucracy and wastage.

The fight against illegal fishing is stepped up—

Mauritanian vessels arrested three fishing boats (with Chinese, Korean and Ghanaian crews) in February-March and seized equipment and 100 tonnes worth of catches. One of the ships had been previously seized and sold by the government to a Mauritanian entrepreneur, but he had sold it back to its original owner. This time, two ships were sold for $300,000 each. According to a 1998 study conducted by the SMCP, vessels operating out of the Canary Islands, close to Mauritania, account for catches equivalent to 50% of that landed by the national fleet. Although the Mauritanian government has taken to seizing ships, most ships arrested are returned and the owner and crew are usually only charged a nominal fine. SMCP has proposed that penal sanctions be introduced to dissuade illegal catches.

—and Greenpeace protests against overfishing

The international environmental pressure group, Greenpeace, has taken up the cause of safeguarding fish stocks in Mauritanian waters. In early March the group prevented a Dutch vessel from leaving the Netherlands, protesting against specific violations by the Netherlands of EU rules on fishing and overfishing in Mauritanian waters. Greenpeace condemned the overall fishing pact signed in 1996 by the EU and Mauritania, claiming that it prevented Mauritania from developing a domestic fishing industry by favouring EU-registered boats. The five-year €267m ($250m) agreement allows some 240 European vessels to fish for higher-value species in Mauritania's waters. Fishing accounts for half of Mauritania's export income and 10% of GDP. About 25% of the state's income comes from fishing receipts, through the taxes, royalties and deposits paid by foreign vessels.

Mining

The World Bank backs a mining project—

Although Mauritania's mineral potential has been confirmed by recent promising discoveries of gold and diamond deposits, there are fears that international companies will remain unwilling to invest unless major mining reforms are completed. To this end, the World Bank has approved a loan of $15m for a 60-month project (another $2m is expected from other donors and the government) to improve the regulation of mining activities and to increase private investment in the sector. Specific objectives include the completion of reforms designed to create a conducive environment for foreign investment, the building of institutional capacity to enforce laws and regulations, the improvement of the availability of geological data for investors, and studies of the environmental and social impacts of mining.

—while the EU finances gold prospecting

The project follows a $3m loan given last October by the EU for the preparation of geological maps and the training of technicians for the state geological research institute, the Office mauritanien de recherches géologiques (OMRG). In addition, the EU has approved a loan of €2.75m ($2.6m) to the OMRG to prepare a geological survey of about 20,000 sq km in the region of Oussate Sfaryatt, in northern Mauritania. The principal beneficiaries of the grant will be private-sector mining enterprises (local and international) which, thanks to the information, will be better equipped to realise "viable" projects, according to a representative of the mining ministry.

Transport

Refuelling is to be improved at Nouadhibou's port—

Since the construction of a petroleum refinery at Nouadhibou 20 years ago, fuel has been transferred to the nearby storage depot by an old tanker. However, frequent disruptions to this service have become a permanent headache for users, particularly fishing vessels that lose up to 25 days per year waiting to be refuelled. Calls for tenders for a new feasibility study to build a pipeline from the refinery to the depot were officially launched in January, but without the prior approval of the company operating the depot, the Mauritanienne des Entrepôts des Produits Pétroliers (MEPP). A study for the construction of a pipeline from the refinery to the depot was conducted in 1990 but concluded that the project was not economically viable. The project was resuscitated in 1995, when a World Bank fishing sector support project provided $1m to build the pipeline. As this was insufficient to undertake the work, complementary funding was sought, but complicated by discussions between the MEPP, the energy ministry, the fisheries ministry, the donor agencies and the private sector. Another feasibility study, completed in 1998, was rejected by MEPP.

—as calls are made to rehabilitate the harbour

Access to Nouadhibou's port has also become increasingly difficult. Several dozen vessels anchored close to the harbour are of dubious sea-worthiness and are making navigation difficult, if not dangerous for other users. The Spanish minister of fishing visited the port in late March to examine the situation and to look into ways of providing financial assistance for the removal of these hazards. A French company had been previously hired by the fisheries ministry to remove the wrecks and to sell the steel content for scrap, but the owners of the vessels disputed the classification of their property as scrap. They challenged the right of the ministry to dispose of their alleged assets in court while seeking indemnification for any alleged damage that has been done. As a result, the clearance operation had been halted and the French contract cancelled.

Foreign trade and payments

The US Export-Import Bank extends its coverage to Mauritania

The Export-Import Bank of the United States, a US government bank that provides loans, guarantees and export credit insurance for US exports to developing countries, has decided to extend short-term trade financing to 11 further Sub-Saharan African countries, including Mauritania, bringing the total number of Sub-Saharan countries eligible to 32.

An Iranian trade fair is planned

A group of Iranian businessmen visited Nouakchott in early April to examine ways of improving commercial ties between the two countries. The minister of trade, crafts and tourism, Ahamdi Ould Hamady, met the delegation and said that a fair of Iranian products would be organised in Mauritania in the near future. This would be the first such event of its kind since the 1980s, when diplomatic relations were severed in the wake of the Iran-Iraq conflict, in which Mauritania supported Iraq.

Aid news

- The African Development Bank provided UM3bn ($15m) in April to help fund programmes aimed at supporting the development of primary healthcare and social affairs.
- In late March Japan pledged ¥121m ($1m) in debt relief for Mauritania as part of an international effort to ease the burden of heavily-indebted developing countries.
- Germany approved two loans in early March, worth DM3m ($1.7m), to strengthen the organisational structure of Mauritania's audit office and to support the Ministry of Rural Development and Environment.

Quarterly indicators and trade data

Senegal: quarterly indicators of economic activity

		1996	1997				1998				1999
		4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr
Prices: Dakar	Monthly av										
Consumer prices:	1990=100	146.0	145.2	143.6	146.6	146.8	146.3	144.5	149.4	148.8	147.7[a]
change year on year	%	1.2	4.1	2.3	0.5	0.5	0.8	0.6	1.9	1.4	n/a
Money & banking	End-Qtr										
M1, seasonally adj:	CFAfr bn	356.5	350.9	303.6	285.1	354.2	351.7	329.2	321.8	410.4	n/a
change year on year	%	7.7	7.0	4.0	–3.3	–0.6	0.2	8.4	12.9	15.9	n/a
Discount rate	% per year	6.50	6.25	6.25	6.00	6.00	6.00	6.00	6.25	6.25	5.75[b]
Foreign trade[c]	Qtrly totals										
Exports fob	CFAfr bn	85.08	49.91	53.69	57.15	69.17	100.92	98.31	99.09	90.27	n/a
Imports cif	“	167.84	170.95	178.13	175.67	177.31	246.58	239.74	236.75	221.27	n/a
Exchange holdings	End-Qtr										
Central bank:											
gold[d]	$ m	8.2	7.6	7.5	7.0	6.7	6.4	6.5	6.4[e]	n/a	n/a
foreign exchange	“	284.8	347.2	297.7	394.1	383.9	386.0	368.3	408.0	428.4	n/a
Exchange rate											
Official rate	CFAfr:$	523.7	564.4	587.8	593.3	598.8	618.5	611.7	561.6	562.6	610.7

Note. Annual figures for most of the series shown above will be found in the Country Profile.
[a] January only. [b] End-February. [c] *DOTS* estimate, figures are subject to revision. [d] End-quarter holdings at quarter's average of London daily price less 25%. [e] End-July.

Source: IMF, *International Financial Statistics.*

The Gambia: quarterly indicators of economic activity

		1996	1997				1998				1999
		4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr
Prices	Monthly av										
Consumer prices:	1990=100	141.4	141.7	143.7	145.0	142.3	138.9	143.2	148.0	148.8	n/a
change year on year	%	1.6	2.0	5.4	3.2	0.6	–2.0	–0.3	2.1	4.6	n/a
Money	End-Qtr										
M1, seasonally adj:	D m	456.2	452.0	541.9	522.8	633.9	565.3	596.3	640.5	631.6	n/a
change year on year	%	–3.5	–8.4	20.6	9.8	38.9	25.1	10.0	22.5	–0.4	n/a
Foreign trade	Qtrly totals										
Exports fob	D m	9.47	59.99	55.22	23.23	7.54	19.86	8.60	7.58[a]	n/a	n/a
Imports cif	”	387.36	827.92	695.55	782.52	527.29	744.51	507.03	349.52[a]	n/a	n/a
Exchange holdings	End-Qtr										
Monetary authorities:											
foreign exchange	$ m	99.71	93.25	96.54	81.29	93.92	93.85	91.25	100.03	103.85	109.25[b]
Exchange rate											
Market rate	D:$	9.892	10.015	10.300	10.452	10.530	10.536	10.583	10.679	10.991	11.074[b]

Note. Annual figures for most of the series shown above will be found in the Country Profile.
[a] Total for July-August. [b] End-February.

Source: IMF, *International Financial Statistics.*

Mauritania: quarterly indicators of economic activity

		1996	1997				1998				1999
		4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr
Prices	Monthly av										
Consumer prices[a]:	1990=100	150.8	152.2	152.9	155.2	158.1	163.0	163.9[b]	n/a	n/a	n/a
change year on year	%	4.7	4.8	4.7	4.2	4.8	7.1	n/a	n/a	n/a	n/a
Money	End-Qtr										
M1, seasonally adj:	UM m	16,729	16,821	17,058	17,580	18,198	17,777	17,750	23,257	19,195	24,615[c]
change year on year	%	–10.5	–9.7	–3.4	0.1	8.8	5.7	4.1	32.3	5.5	n/a
Foreign trade[d]	Qtrly totals										
Exports fob	$ m	133.4	101.2	165.8	122.9	135.5	110.1	126.2	130.0	n/a	n/a
Imports cif	“	182.3	142.2	162.4	129.0	167.0	137.4	154.7	130.3	n/a	n/a
Exchange holdings	End-Qtr										
Foreign exchange	$ m	139.8	153.6	162.5	225.8	200.4	201.2	195.3	232.7	202.8	189.7
Exchange rate											
Market rate	UM:$	142.45	144.59	149.27	160.22	168.35	177.04	179.11	205.52	205.78	207.22

Note. Annual figures for most of the series shown above will be found in the Country Profile.
[a] Mauritanian households. [b] Average for April-May. [c] End-January. [d] *DOTS* estimates, figures are subject to revision.

Sources: IMF, *International Financial Statistics*; *Direction of Trade Statistics*, quarterly.

Senegal: foreign trade

	$ '000					
	Jan-Dec 1990	Jan-Dec 1991	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995
Imports						
Dairy products	46,490	41,737	60,605	70,375	39,649	34,430
Cereals & products	180,544	115,011	112,710	126,051	76,631	195,868
Fruit & vegetables & preparations	30,040	24,753	23,127	24,352	11,880	19,458
Beverages, tobacco & manufactures	29,334	15,303	13,060	14,120	10,418	13,251
Mineral fuels	258,680	120,418	103,415	103,893	168,788	122,389
of which:						
crude petroleum	248,628	91,437	79,441	84,129	35,845	88,646
Animal & vegetable oils & fats	33,186	50,056	52,132	63,915	34,461	67,395
Chemicals	157,626	155,127	151,023	134,104	114,688	170,298
Manufactured goods	259,763	168,130	190,318	175,537	132,682	212,593
of which:						
textile yarn, cloth & manufactures	45,534	28,620	34,258	24,320	16,299	35,600
iron & steel	64,911	39,688	49,180	51,948	42,727	58,692
metal manufactures	51,875	34,161	31,904	30,856	18,553	32,174
Machinery incl electric	235,195	177,720	185,730	168,970	114,186	150,521
Transport equipment	109,294	71,311	85,368	83,415	47,647	70,796
of which:						
road vehicles	102,329	66,659	80,890	79,924	42,617	66,927
Total incl others	1,620,419	1,096,951	1,172,453	1,139,203	876,754	1,224,422
Exports fob						
Fish & products	216,041	215,256	186,875	143,623	42,854	9,842
Oilseed cake	35,366	17,451	18,889	11,889	12,515	5,088
Cotton, raw	9,533	20,248	27,409	27,210	19,011	33,522
Phosphates, mineral	56,962	43,926	66,434	51,166	16,716	43,268
Salt	7,820	7,625	10,337	9,193	7,316	5,226
Mineral fuels	96,768	104,390	80,284	87,445	73,014	79,969
Groundnut oil	129,980	69,534	55,040	33,722	73,780	53,842
Chemicals	116,680	95,110	127,506	103,819	109,373	209,730
Machinery & transport equipment	18,470	13,695	21,805	39,328	25,514	13,461
Total incl others	782,600	652,208	683,031	605,102	444,402	530,759

	$ m			
Exports fob	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997
India	67	136	111	101
Mali	41	45	48	37
France	80	59	76	33
Côte d'Ivoire	8	8	15	18
Benin	3	13	17	16
Mauritania	6	n/a	15	14
The Gambia	7	9	13	12
Italy	22	38	28	8
Netherlands	22	8	12	6
Cameroon	4	9	10	5
Taiwan	9	22	3	4
Total incl others	484	530	531	394

	$ m			
Imports cif	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997
France	300	387	379	370
Nigeria	39	78	77	88
US	44	70	67	58
Spain	47	42	56	54
India	3	44	90	47
Belgium-Luxembourg	33	38	37	46
Germany	28	60	90	45
Italy	55	43	46	40
Japan	35	46	40	36
Thailand	33	60	44	35
Netherlands	34	34	42	33
Total incl others	884	1,223	1,308	1,206

Sources: UN, *International Trade Statistics*, yearbook; IMF, *Direction of Trade Statistics*, yearbook.

The Gambia: foreign trade

($ m)

	Jan-Dec 1994	Jan-Dec 1995
Imports cif		
Food	61.19	37.33
Beverages & tobacco	20.53	6.48
Crude materials	2.05	1.82
Mineral fuels	36.87	20.21
Animal & vegetable oils	3.70	3.87
Chemicals	12.28	7.82
Manufactured goods	32.66	20.96
of which:		
textile yarn, cloth & manufactures	14.74	8.62
metals & manufactures	9.31	5.58
Machinery & transport equipment	39.92	28.45
Total incl others	226.64	140.32
Exports fob		
Food	6.10	4.80
of which:		
fish & preparations	2.71	2.53
Groundnuts, green	8.14	9.98
Textile fibres	5.52	1.74
Total incl others	38.41	27.79

Exports fob	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997[a]	Imports cif	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997[a]
Belgium-Luxembourg	n/a	1	1	124	China	11	9	14	46
Japan	n/a	n/a	1	7	Hong Kong	9	5	8	36
UK	8	7	5	5	UK	22	20	39	34
France	3	6	8	3	Netherlands	13	7	17	24
Spain	2	1	n/a	3	Côte d'Ivoire	36	19	21	23
Hong Kong	n/a	1	n/a	3	France	25	11	29	19
US	2	1	n/a	3	Belgium-Luxembourg	13	10	10	19
China	2	1	1	n/a	Senegal	3	4	8	13
Netherlands	1	1	1	0	Brazil	3	2	15	12
Senegal	6	6	n/a	0	US	7	7	18	11
Total incl others	35	28	22	158	Total incl others	209	140	272	331

[a] *DOTS* estimates.

Sources: UN, *International Trade Statistics*, yearbook; IMF, *Direction of Trade Statistics*, yearbook, quarterly.

Mauritania: foreign trade
(UM m)

	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997	Jan-Dec 1998
Imports fob					
Food	13,224	10,700	11,666	9,913	10,735
Other consumer goods	2,640	2,710	1,358	1,270	1,619
Fuels	4,511	3,704	5,366	4,818	7,048
Machinery & transport equipment	5,201	5,642	4,045	2,186	4,069
Exports fob					
Fish & products	28,073	36,016	38,651	32,237	27,124
Iron ore	22,282	25,572	28,207	32,743	40,470
Gold	2,605	1,869	n/a	n/a	n/a

	$ m					$ m			
Exports fob[a]	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997	Imports cif[a]	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997
Japan	129	161	172	129	France	137	152	198	159
Italy	69	108	88	92	Spain	30	51	46	47
France	63	73	62	77	Germany	36	32	31	42
Spain	53	65	57	46	Belgium-Luxembourg	44	54	40	41
Belgium-Luxembourg	35	37	36	40	Thailand	13	16	33	30
UK	15	21	20	24	Japan	33	32	15	29
Germany	12	22	20	23	Italy	22	14	24	16
Total incl others	436	557	551	525	Total incl others	561	642	638	601

[a] *DOTS* estimates.

Sources: Banque centrale de Mauritanie; IMF, *Direction of Trade Statistics*, yearbook, quarterly.

Senegal and Mauritania: French trade

($ '000)

	Senegal				Mauritania			
	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997
Exports fob								
Food, drink & tobacco	63,857	63,944	72,871	97,904	29,759	38,371	60,165	63,785
of which:								
dairy products	21,861	13,998	21,651	23,049	3,470	2,358	6,100	7,394
cereals & preparations	27,130	26,921	16,863	32,437	15,682	22,147	34,815	38,256
sugar & products	1,201	4,954	14,216	17,695	4,064	9,995	12,551	11,703
Mineral fuels	16,434	24,758	48,918	27,769	6,090	7,580	18,361	8,028
Chemicals	63,796	70,853	78,410	77,784[a]	15,547	16,025	11,333	11,542[a]
Rubber manufactures	5,069	5,721	5,263	5,443	4,426	2,914	3,710	2,658
Paper & manufactures	7,038	12,508	11,534	9,014	1,033	1,193	1,596	1,080
Textile fibres, yarn & manufactures, incl clothing	6,382	7,373	11,326	9,210	2,262	1,762	1,774	1,689
Non-metallic mineral manufactures	6,615	8,119	9,357	7,542[b]	1,415	1,271	1,855	1,876[b]
Iron & steel	6,982	8,813	9,019	17,266[c]	1,995	5,994	4,556	4,385[c]
Metal manufactures	9,874	16,718	21,994	4,074[d]	5,761	5,638	4,084	1,629[d]
Machinery incl electric	86,770	117,832	159,996	116,077	37,944	35,185	30,041	27,378
Transport equipment	27,867	41,037	52,996	33,997	23,276	12,473	35,569	13,073
Scientific instruments etc	9,667	11,645	11,249	11,913	3,506	2,013	2,452	1,892
Total incl others	363,374	461,599	542,641	470,397	138,215	138,033	180,216	144,377
Imports cif								
Fish & products	94,836	108,657	97,575	92,285	4,841	7,236	5,933	6,717
Crude fertilisers & minerals	6,392	3,853	4,781	4,388	1	0	6	0
Metalliferous ores & scrap	538	1,738	1,902	0[e]	66,069	71,961	71,045	78,139[e]
Animal & vegetable oils & fats	47,380	46,136	42,516	25,795	0	0	0	0
Total incl others	183,113	194,095	181,390	150,231	72,673	80,723	77,968	86,243

[a] Including crude fertilisers and manufactures of plastics. [b] Including precious metals and jewellery. [c] Including manufactures and scrap. [d] Tools etc and miscellaneous metal manufactures. [e] Ores, slag and ash.

Source: UN, *External Trade Statistics*, series D.

Mauritania: Japan's imports

($ '000)

Imports cif	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1996	Jan-Dec 1997	Jan-Dec 1998
Fish	113,569	138,414	176,323	188,500	142,616	99,848
Total incl others	117,550	140,861	178,749	189,493	143,194	100,591

Source: Japan Tariff Association, *Japan Exports & Imports*.

