
COUNTRY REPORT

Senegal
The Gambia
Mauritania

2nd quarter 1996

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The Economist Intelligence Unit

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"n/a" means not available; "-" means not applicable

Summary

Senegal, The Gambia, Mauritania 2nd quarter 1996

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- Senegal Political and economic structures **Pages 3-4**
- Outlook: The ruling PS will continue its effort to present an image of party unity, with an eye on the local elections in November. Attention will have to be given to the Casamance separatist problem if further accusations of human rights abuses are to be avoided. A slow economic recovery is likely to continue, with real growth set to reach 4.5% in 1996 and 4% in 1997. **Pages 5-7**
- Review: Despite widespread expectations of significant change, the PS congress has left the party's ruling elite untouched. Party unity, at least at any level above grass-roots, has thereby been strongly reaffirmed. The Casamance peace talks have been postponed indefinitely and there have been signs that violence will return to the region. Neither the government nor the rebel MFDC has done anything to address concerns raised by Amnesty International over human rights abuses. There have been more deaths from cholera, despite government claims to have the epidemic under control. Inflation has continued its decline. The government has kept up the pace of the privatisation programme, announcing details of the proposed sale of SONATEL. Better rains have increased crop output. Several fishing companies have been banned from exporting to the EU. The fall in total external debt seen in 1994 has been confirmed by new World Bank data and the OECD has published figures showing the increase in aid following the devaluation of the CFA franc. **Pages 7-16**
- The Gambia Political and economic structures **Pages 17-18**
- Outlook: A delay in preparations for multiparty elections raises suspicions over whether the military leader, Captain Yahyah Jammeh, genuinely intends to return the country to civilian government. The delay will give Captain Jammeh's own political party, the July 22 Movement, extra time to organise its election campaign while other parties are banned. The economy will remain in limbo pending the return of democracy. **Pages 19-20**
- Review: Voters' registration for multiparty elections has been postponed by six weeks, but the ruling AFPRC has continued to promise a return to democracy. Details of a draft constitution have been published, providing for the separation of executive, legislative and judicial powers. Property belonging to the former president, Sir Dawda Jawara, and other ex-government officials has been confiscated. More journalists have been detained and the government has increased financial requirements for newspapers. New OECD figures have confirmed that foreign aid declined in 1994, although the fall was not as sharp as might have been expected. The Gambia's debt burden remains substantial. Members of the Gambia River Basin Development Organisation have agreed a development programme. Regional fishing controls have been stepped up. **Pages 20-25**

Mauritania Political and economic structures **Pages 26-27**

Outlook: Senate elections have increased the ruling PRDS's grip on power, but the recently formed opposition Action pour le changement is gathering momentum. Changes in the cabinet are unlikely to affect the stability of economic policy, and further reforms will follow soon. GDP growth will remain strong.

Pages 28-29

Review: The cabinet has been fine-tuned with three reshuffles under the new prime minister, Cheikh El Avia Ould Mohamed Khouna. The ruling PRDS has won a sweeping victory in partial elections to the senate, which were boycotted by the opposition UDP. The main independent newspaper, *Mauritanie Nouvelles*, has been forced to close. A series of transport accidents has claimed 11 lives. A delegation of Kuwaiti parliamentarians has visited Nouakchott. Mauritanian refugees in Senegal have agreed to return home. The IMF has praised the country's economic performance and released the second annual loan under the current ESAF. France has agreed to increase funding for public-sector reforms and has provided more money to fight locusts. A food deficit has brought pledges of food aid. The EU has banned imports of Mauritanian fish. The World Bank has threatened to suspend dam funding. SNIM has won loans worth \$4.2m from the EIB. Another Australian mining company has received approval to prospect for minerals. Gold extraction at MORAK has been wound up but a new company, GEMAK, is to exploit copper reserves at the site. Aid levels fell back in 1994 from the high of 1993.

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Statistical appendices

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Political structure: Senegal

Official name: République du Sénégal

Form of state: unitary republic

Legal system: based on the Code Napoléon and the 1963 constitution

National legislature: Assemblée nationale, with 120 members elected by universal suffrage on a part first-past-the-post (50) and part proportional representation (70) system; all serve a five-year term

Last elections: February 1993 (presidential); May 1993 (legislative)

Next elections: May 1998 (legislative); February 2000 (presidential)

Head of state: president, elected by universal suffrage, serves a seven-year term and is re-electable

National government: the president and his Council of Ministers; last major reshuffle March 1995

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); Parti pour la libération du peuple (PLP); And-jef/Parti africain pour la démocratie et le socialisme (AJ/PADS)

President	Abdou Diouf
Prime minister	Habib Thiam

Ministers of state	
agriculture	Robert Sagna
at the presidency	Abdoulaye Wade (PDS)
foreign affairs & Senegalese abroad	Moustapha Niasse
presidential affairs	Ousmane Tanor Dieng

Key ministers	
armed forces	Cheikh Hamidou Kane
commerce, crafts & industry	Idrissa Seck (PDS)
communications	Serigne Diop (PDS-R)
economy, finance & planning	Papa Ousmane Sakho
education	André Sonkho
energy, mines & industry	Magued Diouf
environment & protection of nature	Abdoulaye Bathily (LD-MPT)
fisheries & marine transport	Alassane Dialy Ndiaye
interior	Abdourahmane Sow
justice & keeper of seals	Jacques Baudin
labour & employment	Assane Diop
national education	André Sonkho
public health & social action	Ousmane Ngom (PDS)
tourism & air transport	Tidiane Sylla
urban planning & housing	Daour Cissé
water resources	Mamadou Faye

Economic structure: Senegal

Latest available figures

Economic indicators	1991	1992	1993	1994	1995 ^a
GDP at market prices CFAfr bn	1,507	1,550	1,518	2,050 ^a	2,350
Real GDP growth %	0.7	2.9	-2.0	2.0 ^b	4.5 ^b
Consumer price inflation %	-1.8	-0.1	-0.5	32.3	7.8 ^c
Population ^d m	7.6	7.8	8.0	8.2	8.4
Exports fob \$ m	824	828	719	794	890
Imports fob \$ m	1,114	1,200	1,102	1,027	1,275
Current account \$ m	-226	-299	-302	-179 ^b	-165
Reserves excl gold \$ m	13.2	12.4	3.4	179.6	290.0
Total external debt \$ m	3,554	3,634	3,766	3,678	4,100
External debt-service ratio %	21.1	13.6	8.6	14.6	21.6
Groundnut production ^e '000 tons	728	579	628	718	800 ^b
Exchange rate (av) CFAfr:\$	282.1	264.7	283.2	555.2	499.2 ^c

May 24, 1996 CFAfr521.6:\$1

Origins of gross domestic product 1994 ^e	% of total	Components of gross domestic product 1994 ^a	% of total
Primary sector	24.1	Private consumption	79.6
Secondary sector	21.8	Government consumption	13.6
Tertiary sector	54.0	Gross domestic investment	13.0
GDP at factor cost	100.0	Exports of goods & services	25.4
		Imports of goods & services	-31.6
		GDP at market prices	100.0

Principal exports 1994	\$ m	Principal imports cif 1994 ^a	\$ m
Fish & fish products	249	Intermediate goods	324
Groundnut products	204	Food products	270
Phosphates	102	Capital goods	180
Chemicals (ICS plant)	95	Petroleum products	123

Main destinations of exports 1994 ^f	% of total	Main origins of imports 1994 ^f	% of total
France	26.0	France	34.2
Italy	8.5	Cameroon	7.9
Mali	7.9	Nigeria	6.9
Cameroon	7.4	Italy	5.4

^a EIU estimates. ^b Provisional. ^c Actual. ^d Estimates based on 1988 census. ^e Unshelled; crop years (October-September) beginning in calendar years. ^f Derived from partners' trade returns, subject to a wide margin of error.

Senegal

Outlook

The PS wants desperately to present a united front

The idea that there might be factions of opinion vying for influence within the ruling Parti socialiste (PS), and threatening to undermine the party's coherence in the run-up to elections, is one which PS leaders have not had to consider until very recently. The marked change of policy direction since the 1994 devaluation of the CFA franc has seen the actual implementation of donor-approved structural adjustment policies, and party bosses will have realised that the sale of each parastatal, the removal of each price control and the ending of each legally guaranteed monopoly threatens the vested interests of some party members. This realisation will have only reinforced the desire among PS bosses to strengthen the party's unity before nationwide local elections in November, and it will have ensured that all the media reports of an imminent and fatal split in the PS (however exaggerated they have turned out to be) struck home. However, as amply demonstrated by the non-event that was the party's 13th annual congress in March, 16 years of comprehensive political dominance by the PS and by its leader and head of state, Abdou Diouf, have so limited the scope for a challenge to those at the helm that not a single dissenting voice has actually been raised against the party's chosen policies. With opposition parties all but inert, either because they have been co-opted into a coalition government or because they lack political strength, the PS is likely to approach the local elections in justifiably confident mood.

Human rights require urgent attention—

The damning report by the London-based human rights organisation Amnesty International has been inevitable for some time. Since the declaration of a state of emergency at the onset of economic crisis in mid-1993 the government has deliberately chosen to use strong-arm tactics, with little apparent regard for the impact that these will have on the country's image in the eyes of both non-governmental agencies and, inevitably, donor countries such as Germany. While relations with Germany appear to have been patched up, other donors and creditors will take similar action if the human rights situation is not seen to improve and Amnesty feels constrained to publish further reports with the same message. The time is coming to an end when the Senegalese government can defend actions viewed with distaste elsewhere with the glib restatement that the country is West Africa's oldest multiparty democracy. It is extremely likely that there will be further complaints from domestic and international sources over the human rights situation, particularly as the government clearly has no intention of doing anything in the immediate future to remedy the matters raised by Amnesty. These further protests will eventually reach the ears of donors and creditors and their warnings will be much more carefully heeded by the Senegalese government.

—and Casamance needs a new approach

It would be so much easier for the government to demonstrate its belief in respect for human rights if the armed separatist struggle in Casamance could be brought to a permanent end. One opportunity to do this fell by the wayside in April as a result of government intransigence over minor issues, combined with oversensitivity on the part of the leaders of the armed rebel group, the Mouvement des forces démocratiques de Casamance (MFDC). All-out military clashes in the southern region are now near-certain, to be followed inevitably by further mass arrests and further allegations of torture and arbitrary killings. If a military defeat of the MFDC were easily achievable, it should have happened by now, so the government should be considering further, small concessions to the MFDC, in the hope of ensuring that negotiations can be rescheduled and that a workable and permanent settlement can be found. The profile of the Casamance troubles in the perceptions of donors and creditors will be crucial in determining whether or not the government puts in the effort required to getting peace talks going again.

Economic performance sees a creeping improvement

Recent data have confirmed the EIU's assumptions for 1994 and 1995 on selected macroeconomic data and have given us cause to retain our previous forecasts for their likely progress over this year and next. Specifically, these variables are real GDP growth, which we still expect to register 4.5% in 1996 and 4% in 1997, and average consumer price inflation, which we are confident will fall to 3% in both 1996 and 1997. There has been some confusion on data covering external transactions, with the IMF reworking its presentation of the current account in particular; however, we still expect the broad trends forecast earlier to prevail in 1996 and 1997. Improved export earnings, steady import spending and substantial inflows of donor financial support (on the assumption that the government adheres to its present donor-friendly policy line) will suppress the current-account deficit significantly. An average deficit of just over \$122m is likely in 1996-97.

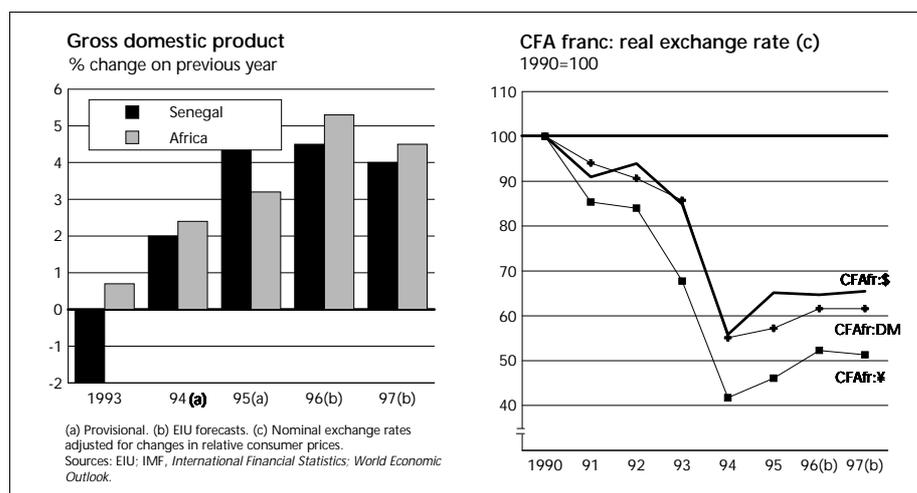
There will, therefore, be no startling economic turnaround to bolster the confidence of the ruling party, and living standards for the population as a whole will only just begin to climb back towards the levels experienced before the last legislative elections in 1993. However, neither does there appear to be an impending economic crisis, and to use the government's own term, the safest course to steer is that of slow but sustainable economic recovery.

Forecast summary

(\$ m unless otherwise indicated)

	1994 ^a	1995 ^b	1996 ^c	1997 ^c
Real GDP (% change)	2.0 ^d	4.5 ^d	4.5	4.0
Consumer price inflation (%)	32.3	7.8 ^a	3.0	3.0
Merchandise exports fob	794	890	950	1,020
Merchandise imports fob	1,027	1,275	1,300	1,320
Current-account balance	-179 ^d	-165	-130	-115
Average exchange rate (CFAfr:\$)	555	499 ^a	505	500

^a Actual. ^b EIU estimates. ^c EIU forecasts. ^d Provisional.



Review

The political scene

Internal PS strife appears to demand urgent attention—

The events of late 1995 gave rise to a widely held belief that internal rivalries had become a serious problem for the ruling Parti socialiste (PS) and that the president and leader of the party, Abdou Diouf, was preparing to take drastic action to remedy the situation at the 13th annual PS congress in March (see below). This expectation was the obvious conclusion to be drawn from the violent clashes which took place in November last year between supporters of rival PS candidates in a local party leadership election (4th quarter 1995, page 8), which left seven people dead. Many political observers gained the impression that the PS was about to be substantially weakened by the formation of a break-away party or by mass defections to the other main political party, the Parti démocratique sénégalais (PDS). Drastic action by Mr Diouf to end any infighting seemed both essential and inevitable.

—as the local elections loom—

The country's next legislative elections are just under two years away, and the leaders of the PS are obviously keen to reverse the trend by which the ruling party's majority has been steadily eroded in the last two sets of legislative elections; the PS won 103 seats out of a total of 120 in the Assemblée nationale (parliament) in 1988, but this fell to 84 in 1993. They will also want to win back the Dakar seat, taken by the PDS in 1993, although that party is now a junior partner in the PS-dominated national unity government. Of more immediate concern are the local government elections, set for November, the results of which will be seen as a strong indication of the party's likely performance in the 1998 legislative elections.

A good performance at November's polls cannot be guaranteed by a party which does not present voters with a united image, and expectations of dramatic remedial action at the March congress were heightened by the fact that the PS is also closely associated in the minds of the electorate with the substantial decline in living standards since mid-1993. An economic crisis evolved less

than six months after the last legislative elections, and matters were compounded by the inflationary impact of the devaluation of the CFA franc in January 1994. While the economy's performance appears to be improving steadily on many fronts, it was widely assumed before the party congress that the PS would not want to rely on the electoral benefits of this gradual improvement, still to be felt by the vast majority of the population, and that the economic situation made it even more vital that the ruling party put its own house in order. It was accepted as inevitable by many that the March congress would see the ousting from the PS of at least some high-level politicians, along with a possible overhaul of the party's structure.

—but the party congress is characterised by unanimity—

March 30, the day of the PS annual congress, brought nothing but disappointment for those who had been looking forward to news of change within the ruling party. The congress was due to take place over two days, but the usual day of debate was cancelled because in the opening minutes a motion was put to name Mr Diouf as party chairman. The same motion proposed that, although he was moving on from the position of secretary-general, Mr Diouf should remain the leader of the PS. Elections to party leadership positions generally round off the congress; as a result, once Mr Diouf's change of role had been confirmed unanimously by the 2,500 delegates, it appeared to be broadly accepted that the discussion agenda had become irrelevant and that the only business left to deal with was the remaining party appointments. No orchestrated attempt was made to stifle discussion; debate appears to have simply been overtaken by events.

—and Mr Diouf's choice of senior officials is simply rubber-stamped—

By leaving the post of secretary-general, Mr Diouf has relinquished involvement in the day-to-day running of the party. To take care of such matters Mr Diouf nominated Ousmane Tanor Dieng as the party's new secretary-general, again to unanimous delegate support. As head of the PS political bureau Mr Dieng, who is also minister of state for presidential affairs, is now second in the party hierarchy only to Mr Diouf himself. A long-time Diouf loyalist, Mr Dieng is widely expected to be Mr Diouf's successor as the leader of the PS. The political bureau named by Mr Diouf (and once more unanimously approved) has been expanded by five members but remains unchanged in flavour, dominated by PS members of the Council of Ministers and including a handful of representatives from the main trade union grouping, the Confédération nationale des travailleurs du Sénégal (CNTS). After an exemplary display of intra-party harmony, the congress wound up a day early with a rousing speech from Mr Diouf, describing the PS as the naturally victorious party.

—suggesting that any discontent is low-level

The total absence of dissent at the PS congress implies that any rivalries which do exist between certain members are limited to competition for personal influence within the party as it is currently organised. Similarly, such a harmonious event makes it difficult to believe that any individual or group within the party is unhappy with its leadership. In addition, it would appear from the conduct of the congress that the regular media reports of factional strife within the ruling party, and of mass desertions to the PDS, are greatly exaggerated. The violent events of November 1995 were undoubtedly shocking and set political analysts' minds racing, but since then the only evidence of factional trouble

within the ruling party has been the suggestions made in highly speculative pieces of local journalism.

The Casamance peace talks are postponed indefinitely—

The unprecedented strides made at the start of the year towards a negotiated peace in the troubled southern area of Casamance (1st quarter 1996, page 8), the setting for an armed separatist struggle for over 13 years, were tragically undone in early April with the cancellation of talks aimed at securing a peaceful solution for the region. Progress in the closing months of 1995 had resulted in concessions from both sides; a ceasefire in December, prompted by the rebel Mouvement des forces démocratiques de Casamance (MFDC), was met in the same month by the release of the leader of the group's more radical southern front, Augustin Diamacoune Senghor, after three years of house arrest in the Casamance capital of Ziguinchor. A meeting in early January between the government and Mr Senghor, as well as other MFDC representatives, ended with an agreement to hold full peace talks, beginning on April 8, with the intention of permanently resolving the Casamance conflict.

—because the MFDC was unhappy with some of the arrangements—

However, with less than a week to go before the talks, Mr Senghor announced that the MFDC would not be attending them. The MFDC leader stated that a key condition for negotiations had been breached because the government had chosen Ziguinchor as the venue; the agreement in January expressly stated that the full peace talks should take place on neutral territory. While Ziguinchor is the Casamance regional capital, it is quite clearly government-controlled territory and is secured by a large garrison of troops. The MFDC also pointed out that the government was deliberately making it difficult for the MFDC leadership to represent truly the organisation at the talks, by refusing to grant passports and other travel documents to Mr Senghor and several other senior MFDC figures. The rebel leaders wanted to meet with key members of their group living in exile in Europe. Without their input, argued Mr Senghor, the MFDC's views could not be put accurately to the government. No new date has been set for the peace talks.

—and trouble returns once more to the southern region

Neither side has officially ended the ceasefire, but in spite of government calls for reconciliation and MFDC statements that it considered a peaceful solution the only way forward for Casamance, armed incidents were reported from the region less than two weeks after the cancellation of the talks. On April 19 it was announced that an army corporal had gone missing and that all government troops stationed in Casamance had been put back on full alert. No clashes between the army and the MFDC have yet been reported but in April and May there were a string of incidents involving armed robbery, bearing all the hallmarks of MFDC activity (predominantly raids on farms to steal recently harvested crops). This was precisely the pattern seen in the early part of 1995, before there was a serious escalation in the level of violence (3rd quarter 1995, page 8).

Amnesty International paints an unflattering human rights picture—

In early March the government was embarrassed by the publication of a damning report by the London-based human rights group Amnesty International. The report claimed that torture was widely used throughout Senegal, generally with official knowledge; that many prisoners were arrested and detained by the authorities in a purely arbitrary manner; and that "disappearances" were often

arranged by the security forces as a method of dealing with potential trouble-makers. Amnesty also levelled accusations at the MFDC, saying that the group routinely used violence to intimidate and blackmail the non-Casamance population of the Kolda and Ziguinchor regions (the two administrative areas which make up Casamance). The MFDC was also accused of organising armed robberies.

—and presents an extensive list of areas in urgent need of attention—

The conclusion of the Amnesty report gives a list of the action which would be required if Senegal wishes to improve its human rights assessment. On the government side, these include:

- the amendment of Senegalese law so that all acts of torture are illegal and so that anyone arrested by the country's security forces is guaranteed access to legal defence;
- the open and impartial investigation of all allegations of torture; and
- respect for the Geneva Convention by the country's armed forces.

Amnesty also insisted on some changes by the MFDC, including:

- the cessation of all acts of torture and arbitrary killing;
- respect for the Geneva Convention, particularly as it relates to the treatment of civilians not involved in a particular conflict; and
- the clear establishment by MFDC leaders that murder and torture are not acceptable, and that all allegations of such actions should be fully investigated.

—but there is no sign of action, despite German pressure

Three days after the publication of the Amnesty International report, the German government announced that it was striking Senegal off its list of African countries which fulfil basic human rights requirements. The Senegalese government rejected Amnesty's assertion that the human rights situation in Senegal required urgent attention; it also expressed disapproval at the German decision, saying that this was purely a result of what it saw as a misguided Amnesty report. Under considerable pressure from the Senegalese government, the German ambassador was apparently forced to apologise and to describe the decision by his government as a "mistake or misunderstanding". There has been no indication that Bonn has reversed its judgement. Apart from rejecting all allegations of wrongdoing, neither the government nor the MFDC has responded to Amnesty's list of required improvements, implying very strongly that little or nothing will be done by either side to improve the human rights situation.

The cholera death toll continues to climb—

In early March the French non-governmental organisation Médecins sans frontières (MSF) reported that cholera in Diourbel region had killed 210 people since the start of 1996. There had been earlier reports of 118 deaths from cholera in Fatick region, in addition to about 120 people killed in the initial outbreak in Dakar last September (4th quarter 1995, page 9). The government dismissed the MSF reports as alarmist, claiming that cholera was in retreat, and the problem was also played down by the UN's World Health Organisation (WHO), which said the government was acting to stop the disease spreading and was running an information campaign. Despite these attempts to belittle

the problem, the UK government's Overseas Development Administration (ODA) lent \$100,000 to MSF later in March to help with cholera prevention and treatment in Senegal.

—posing an electoral problem for the government

The playing-down of the problem by the government is hardly surprising, given the likely damage which news of a growing cholera epidemic would do to its popularity. From the official point of view, the disease must not be seen to be too threatening, as there will be many who will readily blame the government's neglect of water-supply maintenance for the spread of the disease. The government is, however, playing a risky game in the run-up to nationwide local elections. If a more serious and widespread health crisis emerges before November, the government's failure to seek international help in combating cholera will cost it dear in terms of electoral support.

The economy

The finance ministry is pleased with last year's economic performance—

On April 4 the finance ministry issued a statement indicating its satisfaction with the macroeconomic performance achieved during 1995. The statement indicated that the targets for 1995, set during negotiations on the current Enhanced Structural Adjustment Facility (ESAF) with the IMF, had mostly been met. The ministry cited real GDP growth for 1995 of a "steady and sustainable" 4.5%, half a percentage point higher than the EIU's previous estimate but likely to be a realistic reflection of the increase in economic activity seen last year.

—as the fall in inflation is confirmed—

Even more crucially—because huge and sustained price increases were the greatest threat to the benefits of the CFA franc devaluation in January 1994—the finance ministry statement confirmed the picture of falling inflation which had emerged over the course of last year. The ministry said average consumer price inflation fell from 32.1% in 1994 to 8.1% in 1995. Data supplied to the IMF by the regional central bank, the Banque centrale des états de l'Afrique de l'ouest (BCEAO), confirm this trend, giving average inflation of 7.8% in 1995, down from 32.3% in 1994. We had previously estimated average inflation in 1995 at 8%. For the sake of historical consistency, we will now use the BCEAO figures as published in the IMF's *International Financial Statistics*.

—and looks set to continue

Trends in prices in the closing months of 1995 indicate that the rate of consumer price inflation is likely to continue to fall this year as the impact of the halving of the external value of the CFA franc dissipates completely. In December 1995 average consumer prices were actually 1.9% lower than they were in November. An earlier fall in average prices (of 0.8% in September) marked the return of this particularly Senegalese phenomenon, which had previously seen average prices fall every year from 1991 to 1993. The strength of the downward trend in inflation is confirmed by the quarterly data for 1995, which, when compared with the data for corresponding quarters in 1994, allow for any seasonal effects there may be on prices. Year-on-year consumer price inflation fell in every quarter of 1995, so that by the final quarter of the year average prices were only 4.3% higher than in the corresponding quarter of 1994. It is clear that the government's tactics of temporarily reintroducing some price controls and implementing tight fiscal controls, including a strict

public-sector wages policy, succeeded in dampening and curtailing the inflationary impact of the devaluation.

Consumer price index, 1995^a
(1990=100)

	1 Qtr	2 Qtr	3 Qtr	4 Qtr
Index (average)	134.0	135.6	143.0	144.3
Change, year on year (%)	13.8	8.6	5.7	4.3

^a "African" low-income index.

Source: IMF, *International Financial Statistics*.

Seven hotels leave the public sector—

Following the successful sale of seven hotels in March, the focus of the government's IMF-approved programme of privatisation switched to the state-owned airline, Air Sénégal, and the government's telecommunications company, Société nationale des télécommunications (SONATEL). The completion of the hotel sales was announced by the government on March 21. It was also stated that the sales of the three largest state-owned hotels, the King Fahd complex, the Novotel-Saly and the Teranga, had yet to be completed. The France-based Accor group has apparently expressed an interest in a 20% stake in the Teranga, and the government said that negotiations were ongoing at the end of March. The completed hotel sales took to 22 the total number of state-owned companies which have been wholly or partly sold to the private sector in the nine years of the government's privatisation programme.

—and the sale of a majority stake in Air Sénégal is announced—

A 51% holding in Air Sénégal is to be sold to the private sector before the end of this year, according to a government statement issued on April 23. The government is looking for a strategic investor to take the majority holding and bring an end to the perennial subsidies which are required to keep the airline afloat. Air Afrique, the regional airline in which the Senegalese government has a stake, and which provides international routes outside Africa (unlike Air Sénégal, whose services are restricted to the African continent), has been ruled out as a potential investor because of its own deep financial crisis.

—while more details emerge of the planned sale of SONATEL

Despite a series of excited headlines in various media in early May, declaring that the government had announced the privatisation of SONATEL, the sale was actually decided and announced in July last year (3rd quarter 1995, page 12). What was declared on May 4 was that the stake which is to be sold will amount to a 66% holding in the company, one of the largest state-owned enterprises, with total assets estimated at CFAfr50bn (\$96m). Senegalese and foreign investors will be eligible to buy shares, although one condition of the sale is that a controlling stake in the company (as yet unspecified but certain to be 51% or more) has to go to a single, strategic investor. SONATEL, which made a profit of CFAfr11.6bn in 1994, on turnover of CFAfr55bn, has a total staff of just under 1,900. Once a majority stake has passed into private hands, the company will lose its legal monopoly on domestic telephone services. The government has announced, however, that SONATEL will retain its monopoly on international calls for a set period after privatisation.

In August 1995, following the government's announcement of its intention to sell the company, there was a short series of strikes by SONATEL employees

which, through the powerful trade union grouping, the Confédération nationale des travailleurs du Sénégal (CNTS), took in some workers from the rest of the public sector. The strikes were a pre-emptive action by workers, afraid that the run-up to privatisation would see large numbers of job cuts or that a new private-sector owner would engage in substantial downsizing. After the recent announcement of further details of the planned sale, a statement from trade union leaders warned that any aspect of the sell-off which was detrimental to the workforce would not be allowed to go ahead.

Agriculture and fishing

Most crops benefit from improved rains—

Poor rains in 1994 hit food crop production, but rains improved in 1995 with a consequent rise in output, which has apparently been sustained into this year for most food crops. The agriculture minister, Robert Sagna, said on May 3 that total cereals output, which stood at 941,000 tons in 1994 (see table below), had risen to 1.5m tons in 1995, and that it would rise again to 1.95m tons in 1996. Production of bananas, which rose sharply in 1994 despite the poor rains, is estimated to have increased further to 7,000 tons in 1995. Output of seed cotton is being badly hit by the falling area planted as well as by declining yields. The cotton parastatal, the Société de développement des fibres textiles (SODETIFEX), estimates that production fell again in 1995, to a total of around 30,000 tons. A statement from SODETIFEX in March, however, outlined the company's plan to pay increased rebates to cotton farmers who produced larger crops, in the hope of raising national production to 51,000 tons in 1996 and 70,000 tons in 1997.

Agricultural output
('000 tons)

	1993	1994	% change
Maize	138.3	108.2	-21.8
Millet & sorghum	752.6	670.8	-10.9
Paddy rice	193.5	162.2	-16.2
Green beans & cowpeas (niébé)	55.9	29.0	-48.1
Bananas	4.5	6.6	46.7
Groundnuts	627.6	718.1	14.4
Cotton (seed)	38.8	37.2	-4.1

Source: BCEAO, *Notes d'Informations et de statistiques*.

—but an increasing share of groundnut output evades official channels

Groundnuts, meanwhile, have continued to thrive. After a substantial crop of 718,100 tons in 1994, production is officially estimated to have reached 800,000 tons last year. In May Mr Sagna said that groundnut output was to be stepped up over the next five years, to reach an annual crop of over 1m tons. However, despite last year's increased crop, sales to the state groundnut marketing company, Sonagraine, were very low at an estimated 264,000 tons. Many groundnut farmers will not do business with Sonagraine because they are in debt to the company for earlier loans to help with purchases of inputs. Even some of those with no debt to Sonagraine prefer to sell on the parallel market, where they can earn as much as CFAfr155/kg (30 cents/kg), a substantial improvement over the state-controlled producer price of CFAfr120/kg offered

by Sonagraïne. It is hoped that the further liberalisation of groundnut marketing will eradicate this problem in future, perhaps with the eventual abandonment of centrally controlled producer prices.

Fish export licences are revoked

In mid-March the Direction de l'océanographie et des pêches maritimes du Sénégal (DOPM) announced that six fishing and fish-processing companies were to be banned from selling output to the European Union (EU) until they carried out modernisation to bring their hygiene standards up to the level required by a new EU directive, which took effect on January 1, 1996. The DOPM has been approved by the EU as the local authority charged with ensuring that health and safety standards are met by all Senegalese companies in the fisheries sector which export to the EU. The required improvements are likely to be carried out fairly quickly as the EU is by far Senegal's most important market for fish and fish products. Around 80% of the country's annual exports of fish and fish products go to the EU, a total of around 275,000 tons.

Foreign trade and payments

New data show the impact of post-devaluation debt rescheduling—

Figures published in the latest edition of the World Bank's annual *World Debt Tables* show that Senegal's total external debt fell slightly in 1994, to just under \$3.7bn. Despite a \$56m rise in indebtedness to the IMF, and total disbursements from other creditors of \$130m, some \$88m (or 2.3%) was knocked off total external liabilities. This was because, in the aftermath of the devaluation of the CFA franc, many creditors showed their support for the countries of the Franc Zone by rescheduling and writing off substantial sums of outstanding debt. For Senegal, this meant a total of \$205m in outstanding debt being forgiven in 1994, along with the rescheduling of \$87m in interest payments due that year and the writing-off of a further \$24m. Using new concessional loans supplied for the purpose, the government was able to reduce outstanding interest arrears on long-term debt by \$125m, to only \$38m. This contributed to the fall in overall debt stock, as it made up a substantial part of the \$201m fall in short-term debt in 1994.

External debt

(\$ m; end-period for stocks)

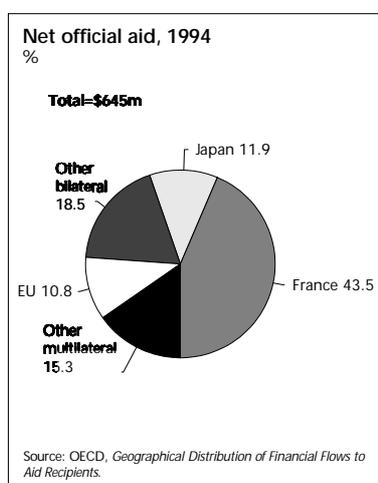
	1993	1994
Total external debt	3,766	3,678
of which:		
public & publicly guaranteed long-term debt	3,009	3,070
short-term debt	462	261
of which:		
interest arrears on long-term debt	163	38
use of IMF credit	244	300
Total debt service due	333	465
Total debt service paid	120	197
Long-term	75	151
Short-term	15	14
IMF repurchases & charges	30	31
Total arrears (on long-term debt)	370	289

Source: World Bank, *World Debt Tables*.

—as well as the impact of devaluation on debt-burden measures

Unfortunately, the fall in total external debt did not result in an improvement in Senegal's overall debt profile because of the restrained performance of exports in 1994, and also, ironically, because of the devaluation of the currency itself. The small increase registered in export earnings in 1994 was outweighed by the increase in debt-service payments made, resulting in an increase in the debt-service ratio (debt service paid as a proportion of exports of goods and services) from 8.6% in 1993 to 14.6% in 1994. The halving of the external value of the currency in 1994 meant that, despite a fall in external debt and real GDP growth of around 2%, total external liabilities as a proportion of GDP rose from 69.6% in 1993 to 99.1% in 1994. The World Bank estimates that GDP fell from the equivalent of \$5.4bn in 1993 to \$3.7bn in 1994, and it is purely this side-effect of the change in the CFA franc parity which has made the burden of Senegal's external debt appear to become suddenly so much heavier.

Aid figures show how donors rallied round



As well as the country's creditors, Senegal's bilateral and multilateral donors were generous with their support in 1994. Figures published by the OECD in its annual *Geographical Distribution of Financial Flows to Aid Recipients* show that, having fallen from over \$822m in 1990 to \$506m in 1993, net official development assistance to Senegal increased by some 27% in 1994 to reach a total of \$645m. France, the former colonial power and traditionally by far the most important provider of aid, led the way with an increase in net development assistance of over 45%, bringing the total for 1994 to just under \$281m. Assistance from other bilateral sources increased by 6%. Official development assistance from multilateral sources, predominantly the European Union (EU) and the World Bank's concessional lending arm, the International Development Association (IDA), increased by 32% in 1994 to a total of \$168.5m. The terms under which assistance was given also improved, with more than 99% of the total coming in grant form in 1994, compared with 95% in 1993.

Net official development assistance^a
(\$ m)

	1993	1994
Bilateral	378.1	476.5
of which:		
France	193.4	280.8
Japan	35.6	76.9
USA	42.0	30.0
Italy	29.7	17.0
Canada	18.4	17.0
Multilateral	128.0	168.5
of which:		
EU	46.3	69.6
IDA	41.8	48.7
ADF	14.4	14.1
Total	506.2	645.0
of which:		
grants	479.1	640.9

^a Net official development assistance is defined as grants and loans, aimed at fostering development in the recipient country and consisting of a grant element of at least 25%, minus repayments made on any earlier lending.

Source: OECD, *Geographical Distribution of Financial Flows to Aid Recipients*.

Other aid news

New aid agreements this quarter, not mentioned elsewhere in this report, included the following.

- A grant for general financial assistance from the Canadian government, announced on May 5 for a total of US\$77m, to be disbursed evenly over five years.
- A grant of \$15m for balance-of-payments support from the Japanese government, announced in early March along with a rescheduling of \$7m in outstanding debt to Japan.
- A concessional loan of \$26m from the German government to help fund a project to pipe water along the Cayor canal into Dakar from Lake Guiers. The loan was seen as a gesture of reconciliation as its announcement in early May followed the argument over the human rights situation in Senegal (see The political scene).

Political structure: The Gambia

Official name: The Republic of The Gambia

Form of state: unitary republic

Legal system: based on English common law and the 1970 constitution

National legislature: House of Assembly: suspended following the military coup of July 1994, normally has 50 members, 36 elected by universal suffrage, five chiefs, eight non-voting members and the attorney-general; all serve a five-year term

Last elections: April 1992 (presidential and legislative)

Next elections: return to civilian rule planned after presidential and legislative polls, originally scheduled by military government for July 1996, now delayed

Head of state: Captain Yahyah Jammeh, who led the military coup in July 1994

National government: military/civilian government nominated by the post-coup Armed Forces Provisional Ruling Council (AFPRC) in August 1994

Main political parties: political activity was banned in July 1994

The government

Chairman of AFPRC & head of state

Captain Yahyah Jammeh

Key ministers

agriculture

Musa Mbenga

civil service

Mustapha Wadda

culture & tourism

Susan Waffa-Ogoo

defence

Captain Edward Singhateh

education

Satang Jow

external affairs

Baboucar Blaise Jagne

finance & economic affairs

Bala Garba Jahumpa

health, social welfare & women's affairs

Nyimassata Sanneh Bojang

interior

Captain Lamin Bajo

justice

Musa Bittaye

local government & lands

Captain Yankuba Touray

public works, communications & information

Ebrihima Ceesay

trade, industry & employment

Dominic Mendy

youth & sports

Aminatta Fall-Sonko

Governor of the Central Bank

Clarke Bajo

Economic structure: The Gambia

Latest available figures

Economic indicators	1991	1992	1993	1994	1995 ^a
GDP at market prices ^b D m	2,948	3,230	3,420 ^c	3,574 ^a	3,753
Real GDP growth ^b %	5.4	1.4	1.4	6.2 ^c	0.0
Consumer price inflation %	8.6	9.5	6.5	1.7	7.0 ^d
Population ^e '000	947	986	1,026	1,068	1,100
Exports fob ^{bf} \$ m	37.9	57.4	66.2	35.3	16.2
Imports cif ^b \$ m	199.9	218.8	259.8	209.1	134.3
Current account ^b \$ m	13.2	37.2	-5.3	8.2	n/a
Reserves excl gold \$ m	67.6	94.0	102.2 ^g	98.0	106.2 ^d
Total external debt \$ m	383	403	424	419	n/a
External debt-service ratio %	14.5	13.0	13.7	19.0	n/a
Groundnut production ^h '000 tons	84.0	55.0	65.0	70.0	190.0 ^d
Charter tourists ^b '000	65.8	63.9	100.0	30.0 ^a	60.0
Exchange rate (av) D:\$	8.80	8.89	9.13	9.58	9.55 ^d

May 24, 1996 D9.80:\$1

Origins of gross domestic product 1993 ^b	% of total	Components of gross domestic product 1993 ^b	% of total
Agriculture	23	Private consumption	74
Industry	14	Government consumption	18
Services	63	Gross domestic investment	20
GDP at factor cost	100	Exports of goods & services	53
		Imports of goods & services	-65
		GDP at market prices	100

Principal exports 1991 ^b	\$ m	Principal imports 1992 ^b	\$ m
Fish & fish preparations	3.2	Food	63.6
Groundnut oil	1.5	Machinery & transport equipment	51.9
Groundnut meal	1.4	Manufactures	43.4
Groundnuts (shelled)	1.0	Minerals & fuel	12.2

Main destinations of exports 1994 ⁱ	% of total	Main origins of imports 1994 ⁱ	% of total
UK	23	Côte d'Ivoire	17
Senegal	17	France	12
France	9	UK	11
Switzerland	9	Belgium-Luxembourg	6

^a EIU estimates. ^b Fiscal years starting July 1. ^c Official estimate. ^d Actual. ^e Based on 1993 census. ^f Excluding re-exports. ^g End-September. ^h Crop years starting in calendar years. ⁱ Derived from partners' trade returns, subject to a wide margin of error.

The Gambia

Outlook

A delay in the transition to democracy raises suspicions—

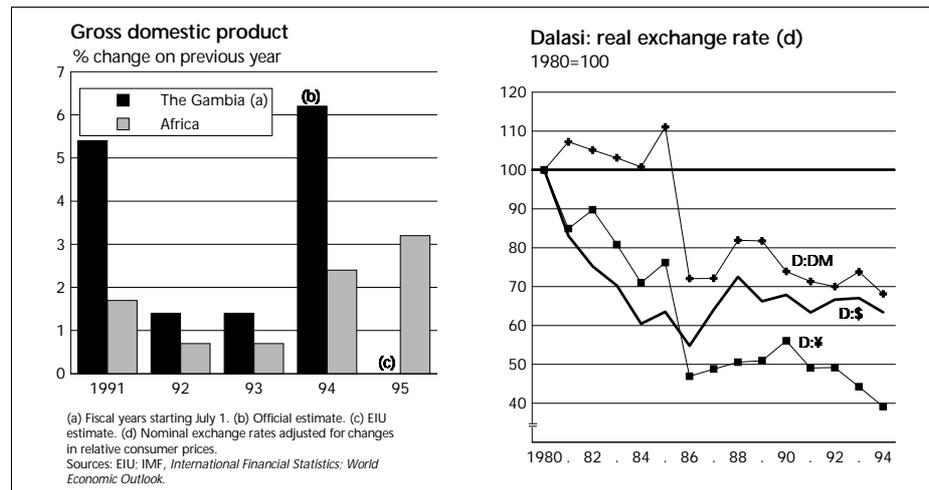
The central question of whether Captain Yahyah Jammeh, The Gambia's military ruler, is to be trusted when he promises to return the country to democratically elected civilian government is still unanswered. Fresh suspicions of insincerity must be raised by his recent delay of the process, which was to have culminated in elections this July but will now be put off by a further six weeks at least. His argument that electoral documents are not ready, and the implication that this is somehow the fault of the European Union (EU), rings slightly hollow as they have been used to justify the continuing ban on all political activities except those of Captain Jammeh's own party, the July 22 Movement.

—and gives Captain Jammeh more time to plan his election campaign

Assuming that the captain and his fellow officers in the Armed Forces Provisional Ruling Council (AFPRC) really do intend to hand over power (which is far from certain), the delay will no doubt allow them and the July 22 Movement to dig in for an effective electoral campaign. Captain Jammeh has made no secret of his desire to remain head of state, and will probably do so by fair means or foul. His anti-corruption drive and the vitality he has contributed to some aspects of national life have brought him some popularity, and he may indeed win the election fairly if it eventually takes place. Conveniently, the six-week delay brings The Gambia to the onset of the rainy season, logistically a bad time to conduct elections, so it is now unlikely that any voting will take place before September or October.

The economy awaits the return of democracy

New data on the economy are scarce at the moment, partly because of the secretive nature of the administration and partly because, with the main aid donors absent from the scene, there is little independent reporting. There have been indications that the tourism industry, which in normal times yields up to one-third of GDP but which was wiped out for the best part of a year after the 1994 coup, has been recovering somewhat. Holidaymakers remain dubious however, and the improvement has been markedly slow in the recent 1995/96 (October-May) season. Continuing violence in Liberia and Sierra Leone have exacerbated West Africa's poor image in the eyes of European tourists. Essentially, the Gambian economy cannot revive without some semblance of democracy, otherwise Western aid and investment will not be forthcoming. If the experience of two years of military rule leaves The Gambia better managed and less prone to corruption, we may expect donors to respond with improved flows of aid for essential structural reforms as well as for presently moribund, but ultimately worthwhile, projects like the Gambia ports development.



Review

The political scene

The authorities meet a setback on the road to democracy—

Pledges by Captain Yahyah Jammeh and his military government, the Armed Forces Provisional Ruling Council (AFPRC), to return The Gambia to a democratically elected government during July 1996 were cast into doubt when it was announced on April 2 that voters' registration had been put back by six weeks. The reason given was that the European Union (EU), which had agreed to finance the procedure, had left it until the end of March to sign a contract with a UK company, Thomas De La Rue, which was to produce the explanatory documents; this process would take four weeks, according to the electoral commission in Banjul. The delay meant that the ban on political activities remained in force. The AFPRC, in power since the army overthrew the civilian government of the former president, Sir Dawda Jawara, in July 1994, had decreed that parties would not be permitted to function normally until the voter registration procedure had been completed. The US-based National Democratic Institute, whose representative in The Gambia was expelled by the AFPRC in late 1995 (1st quarter 1996, page 20), was reported in early February to have closed its Banjul office, saying it doubted the military government's sincerity about the transition to democracy.

—but the AFPRC continues to proclaim its good intentions—

The electoral commission had announced in mid-February that registration would take place between April 1 and May 13. Captain Jammeh was quoted as saying that this would enable voters to register independently of political organisations, and that the ban on political activities would be lifted once registration had been completed. In an address to diplomats, the captain complained bitterly that his government had been treated unjustly by the international community, which had imposed crippling aid sanctions pending a return to democracy. He said he himself would have preferred to hold elections well before July, but that because of "material constraints" it was simply not possible to get everything ready in the time available. The elections could be held within

two weeks if the international community would provide The Gambia with aid in the form of printing equipment, he said.

—publishing some details of a draft constitution—

Extracts from the draft of a new constitution drawn up by the constitutional commission, established in April 1995 under a Ghanaian judge, Gilbert Mensah Quaye (1st quarter 1996, page 21), were published by the justice ministry on March 9. Provisions include the lowering of the voting age from 21 to 18 and the introduction of an unspecified compulsory national service for young people. The draft would make the president, vice-president and secretaries of state answerable to parliament, which would have power to discipline or dismiss them by way of a no-confidence vote. The extracts published did not indicate how a head of state and members of parliament would be elected, nor did they mention the duration of terms of office.

—which incorporates the separation of powers

The draft constitution provides for the separation of executive, legislative and judicial powers, according to the extracts published. It would remove ministers' right to appoint secretaries of state, which would in future be the president's prerogative. It would create a special court to try cases of alleged corruption, and a national commission on civic education. It provides for a new post of ombudsman, to handle complaints against the administration. The independence of the media would be guaranteed, as would the fundamental rights of women, children and the disabled. An independent electoral commission would be set up to organise and supervise general elections—the same body which was subsequently to announce the six-week delay in voters' registration. The draft constitution is to be put to a referendum, but no date has yet been set.

The state confiscates Sir Dawda's houses—

The government announced on March 20 that it had confiscated 17 separate properties owned by Sir Dawda, who has lived in the UK since his overthrow. A statement from the president's office said that the confiscation followed a report by a commission of inquiry looking into the recovery of public property, which was set up at the time of Captain Jammeh's coup. Sir Dawda was understood to have owned four houses in Banjul, five in the nearby residential suburb of Fajara, five more scattered around the capital's outskirts, and three farms. The statement called on those responsible for managing the properties since July 1994 to deliver details of all earnings derived from them. A warrant from the Banjul High Court is out for the arrest of Sir Dawda on charges of theft and abuse of office in connection with an embezzlement case, in which he is accused alongside a Lebanese businessman (1st quarter 1996, page 20).

—and it is not long before other officials lose their property

On April 4 it was announced that 11 officials of Sir Dawda's government had had their property seized "in the interests of the people". Those affected included the former vice-president, Saihou Sabally, and the ex-finance minister, Bakary Dabo, together with a number of diplomats and other senior officials of the *ancien régime*. An official statement called on those responsible for management of the properties in question to turn them over to the military authorities and to return rents to the public revenue department. Anyone guilty of fraud or embezzling state funds would face justice, even if they lived outside the country, the statement said.

- A Banjul magistrate is sacked after police acquittals
- A magistrate, Bory Touray, was sacked in mid-April after he acquitted three police officers accused of theft. An official letter to Mr Touray gave no reason for the dismissal, but it was understood to have been connected with a recent case in which he threw out charges against the former police chief, Pa Sallah Jagne, his deputy, Ebrima Chongan, and an inspector, Kebba Dibba, on the grounds that the prosecution was slowing the trial down by failing to present witnesses.
- More journalists are detained—
- Fatoumata Jallow, a journalist on the independent *Daily Observer*, was arrested in mid-February and questioned in connection with allegations that she was involved in the distribution of leaflets written by Captain Ebou Jallow, the former government spokesman who defected to the USA in October 1995 (4th quarter 1995, page 22). Ms Jallow had previously been arrested over the same matter in October, together with the *Daily Observer's* advertising director, Lorraine Forster, but denied the charge. Both women had subsequently been freed. The alleged incidents coincided with attempts by pro-Jawara sympathisers to organise demonstrations demanding the ex-president's return, prompting nervous reactions by the AFPRC (4th quarter 1995, page 22; 1st quarter 1996, pages 18-20).
- On February 23 the security services arrested Boubacar Sankanu, a freelance journalist working for the BBC, Voice of America and a local newspaper, *The Point*, giving no reason. Mr Sankanu's arrest appears to have been connected with his reporting of a fire which partially burned out the central market at Serrekunda, near Banjul. The fire, which is said to have destroyed an estimated D2m (\$200,000) worth of merchandise, was the third major blaze at the market in the past six years.
- prompting international concern—
- On May 9 the USA-based Committee to Protect Journalists, a non-governmental organisation, appealed to Captain Jammeh to free two more journalists, said to be held incommunicado after refusing to reveal sources. The two, Alieu Badara Sowe of *The Point* and Bruce Asemota of the *Daily Observer*, were said to have been taken away by security men, and Mr Asemota was alleged to have been beaten in custody. Mr Sowe's arrest followed publication of an article claiming that a senior police officer had been involved in the theft of recovered stolen money. Mr Asemota is said to have obtained and published information on a reshuffle of senior police officers.
- and new pressures build up on the local media—
- A series of tough measures aimed at reining in The Gambia's formerly quite free press were announced by the AFPRC in February. The deposit required to be paid to the government as part of the application procedure to begin publication of a new newspaper, formerly D1,000 (\$102), was raised to D100,000. The fines applicable to journalists found guilty of defamation or other editorial offences were also raised; fines previously running between D1,000 and D5,000 were increased to between D50,000 and D100,000.
- as the government squeezes their finances
- Under the same set of measures, established newspapers were ordered to re-register and to pay deposits accordingly of D100,000 each. Local journalists were said to be incensed by what most regarded as another restriction on press freedom. Eight people, all newspaper proprietors or editors, were duly brought up before the Banjul bench on March 7, accused of failing to re-register. Among

papers concerned were the *Daily Observer*, *The Point*, *Foroyaa* and *New Citizen*. All were reported to have tried, but failed, to raise the deposits required. The cases were deferred. The following week these newspapers failed to appear, the proprietors having decided against putting themselves outside the law by publishing while technically unregistered. Three independent papers, *The Point*, *Foroyaa* and *Gambia Monthly*, were allowed to re-register on March 14 after raising the deposit. Decisions on applications by *New Citizen*, the *Daily Observer* and *The Toiler* were pending.

A Caribbean visitor boosts Commonwealth interest in the transition

The prime minister of St Vincent and the Grenadines, Sir James Mitchell, arrived in Banjul on March 15 on a two-day official visit. He met Captain Jammeh, and Gambian officials said the two leaders discussed bilateral cooperation. It emerged from subsequent reports that the AFPRC had been at some pains during Sir James's visit to emphasise its commitment to a transition to civilian democratic rule. A statement on April 23 from the Commonwealth ministerial action group, meeting in London, noted this and appealed to Commonwealth states to assist The Gambia in completing the transition process. The group proposed to send a ministerial mission to The Gambia to reaffirm Commonwealth support for the transition, and to explore areas in which it could provide further multi-lateral and bilateral assistance.

Cuban doctors move in

Twenty-eight Cuban doctors are expected to arrive in The Gambia to begin service in hospitals, officials announced in mid-April. The doctors will replace approximately 30 Chinese doctors withdrawn following the severing of diplomatic ties in July 1995, after the AFPRC recognised Taiwan (3rd quarter 1995, page 20). It was not clear whether the Cubans would be serving as part of an aid programme.

The economy

Foreign aid continues to decline—

The latest aid figures published by the OECD Development Assistance Committee (DAC) in its *Geographical Distribution of Financial Flows to Aid Recipients* show that total net aid to The Gambia fell to \$70.9m in 1994 from \$86.6m the previous year. Of this total, \$36.1m was from bilateral donors and \$34.7m from multilateral sources. Japan remained the biggest donor, giving \$11.5m in 1994, followed by the European Union (EU) with \$10.6m.

—although the fall is less sharp than might have been expected

According to the DAC figures, the drop in net aid in 1994 was not as dramatic as might have been expected, given the decision by major donors to cut off all but the most urgent humanitarian assistance in the wake of the 1994 coup. Sweden is shown as the only country to have cut off all assistance in 1994, but that was from the already low level of \$600,000 in 1993. France more than halved its aid to The Gambia, to \$2.6m from \$5.3m in 1993, but in most cases the drop was less dramatic; aid from the EU actually rose in 1994. Nevertheless, there can be no doubt that the highly aid-dependent economy has been badly hit by aid sanctions since the coup.

Net official development assistance^a

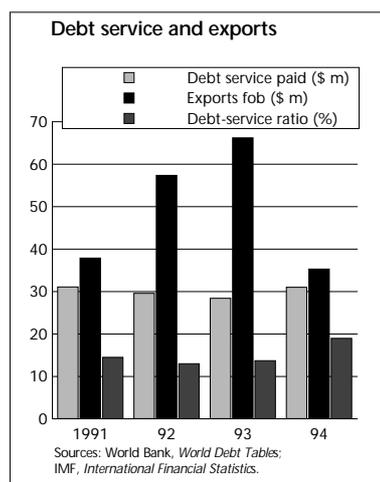
(\$ m)

	1992	1993	1994
Bilateral	48.3	47.7	36.1
of which:			
Japan	5.1	12.7	11.5
USA	9.0	12.0	8.0
Germany	5.8	5.0	5.6
Multilateral	61.5	38.8	34.7
of which:			
EU	16.0	9.4	10.6
IDA	21.4	7.3	8.6
ADF	13.6	8.9	6.8
Total	109.9	86.6	70.9

^a Disbursements minus principal repayments on earlier lending. Official development assistance is defined as grants and loans with at least a 25% grant element, provided by OECD and OPEC member countries and multilateral agencies, and administered with the aim of promoting development and welfare in the recipient country.

Source: OECD, *Geographical Distribution of Financial Flows to Aid Recipients*.

The debt burden remains substantial



The latest edition of the World Bank's *World Debt Tables* shows that The Gambia's total debt stock at the end of 1994 stood at \$419.2m, slightly down on the end-1993 total of \$423.9m. According to World Bank figures, this represented 112% of the country's GNP in that year. Of the total debt stock, \$364.3m represented long-term debt, nearly all of which was owed to official donors; only \$500,000 was publicly guaranteed debt owed to private creditors. Debt-service payments in 1994 amounted to \$31m, slightly less than the sum due, and although interest arrears held steady at \$600,000, principal arrears rose by \$1.7m to \$5.6m. The Gambia's debt-service ratio remained manageable, at 19%, although this was considerably higher than the 1993 ratio of 13.7%; this is because of the sharp fall in export earnings in 1994, following the coup and the devaluation of the CFA franc (3rd quarter 1995, page 21).

External debt

(\$ m)

	1992	1993	1994
Total external debt	403.4	423.9	419.2
Long-term debt ^a	346.2	348.0	364.3
Official creditors	337.1	343.3	363.8
Multilateral	253.8	271.2	299.8
Bilateral	83.3	72.0	64.0
Private creditors (publicly guaranteed)	9.1	4.8	0.5
Short-term debt	21.6	42.6	23.6
Use of IMF credit	35.6	33.2	31.3
Total debt service paid	29.6	28.4	31.0
Total debt service due	28.8	29.7	31.8
Debt-service ratio (%)	13.0	13.7	19.0

^a Maturity over one year.

Source: World Bank, *World Debt Tables*.

The population is set to grow rapidly

The Gambia's population of 1.2 million in 1996 is projected to almost double to 2.1 million by 2025, according to a forecast in May by the UN Population

Fund (UNFPA) in its annual report, *The State of World Population*. Swollen by the shift from the countryside to the towns, the urban population, currently estimated at 26% of the total, is set to grow by 5.3% a year in the five years to 2000, the fund said. The report also notes that life expectancy for Gambian men is 45.4 years, one of the lowest in the world, and for women 48.6. The country is densely populated at 270 people per hectare of arable land, compared with only 111 people per hectare in neighbouring Senegal.

OMVG member states draw up a development programme—

The Gambia and other member states of the Gambia River Basin Development Organisation (known by its French acronym, OMVG) met in Bissau in early February and agreed on a development programme. Ministers from The Gambia, Senegal, Guinea and Guinea-Bissau are to draw up a detailed set of proposals to put to the organisation's heads of state. These are reported to concern: new irrigation schemes; the integration of national programmes of energy production and distribution; and the agricultural development of the tributary Kayanga/Geba and Coliba/Corrubal river basins.

—and The Gambia joins partners in stepping up fisheries controls

Ministers from The Gambia and five other West African states (Cape Verde, Guinea, Guinea-Bissau, Mauritania and Senegal) agreed at a meeting of their subregional fisheries commission on ways of improving fishing surveillance and monitoring in their territorial waters. Measures were agreed to protect the fragile marine ecosystems from overfishing and to harmonise national policies on conservation and fisheries management.

Political structure: Mauritania

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 Assemblée nationale, reconvened following elections in 1992, consists of an upper house with 56 senators and a lower house with 79 deputies

Last elections: January 1992 (presidential); March-April 1992 (legislative)

Next elections: October 1996 (legislative); January 1998 (presidential)

Head of state: president, elected for a renewable six-year term

National government: the president and his appointed Council of Ministers; last major reshuffle May 1996

Main political parties: 21 political parties have registered under the 1991 constitution, including: Parti républicain démocratique et social (PRDS—ruling party); Union des forces démocratiques (UFD); Union pour la démocratie et le progrès (UDP); Action pour le changement (AC); Rassemblement pour la démocratie et l'unité (RDU)

President

Maaouya Ould Sid'Ahmed Taya

Prime minister

Cheikh El Avia Ould Mohamed Khouna

Key ministers

civil service, labour, youth & sports

Sidi Mohamed Ould Mohamed Vall

culture & Islamic affairs

Mohamed Ould M'Boirick

defence

Abdellahi Ould Abdi

education

Baba Ould Sidi

finance

Camara Aly Gueladio

fisheries & the maritime economy

Abdallahi Ould Nem

foreign affairs & cooperation

Lemrabott Sidi Mahmoud Ould Cheikh Ahmed

health & social affairs

Abou Demba Sow

information & relations with parliament

Rachid Ould Saleh

interior, posts & telecommunications

Dah Ould Abdel Jelil

justice

Mohamed Lemine Salem Ould Dah

mines & industry

N'Gaidé Lamine Kayou

planning

Mohamed Ould Amar

rural development & the environment

Mohamed Ould Ch'bih Ould Cheika Melainine

secretary-general of the presidency

Ahmed Ould Minnih

supplies & transport

Mohamed Deina Sow

trade, crafts & tourism

Boidiel Ould Houmeid

water & energy

Mohamed Lemine Ould Ahmed

Governor of the Central Bank

Ahmed Ould Zein

Economic structure: Mauritania

Latest available figures

Economic indicators	1991	1992	1993	1994	1995 ^a
GDP at market prices UM bn	92.6	103.6	114.5 ^b	126.5 ^b	141.6 ^c
Real GDP growth %	2.6	1.7	5.5	4.6	4.6
Consumer price inflation %	5.6	10.1	9.3	4.1 ^a	6.5
Population m	2.04	2.11	2.16	2.21	2.27
Exports fob \$ m	436	407	399	394	457
Imports fob \$ m	399	461	409	382	366
Current account \$ m	-30	-118	-139 ^b	-20 ^c	n/a
Reserves excl gold \$ m	67.6	61.2	44.6	39.7	85.5 ^d
Total external debt \$ m	2,236	2,138	2,182	2,326	n/a
External debt-service ratio %	19.0	16.2	27.5	23.2	n/a
Iron-ore exports '000 tons	10,469	8,009	9,736	10,342	11,890 ^c
Fish exports '000 tons	301.0	290.6	312.6	196.0	300.0 ^b
Exchange rate (av) UM:\$	81.9	87.0	120.8	123.6	129.8 ^d

May 24, 1996 UM136.4:\$1

Origins of gross domestic product 1992	% of total	Components of gross domestic product 1993	% of total
Agriculture	29.5	Private consumption	71.1
Mining	8.3	Public consumption	17.5
Manufacturing	10.8	Gross fixed investment	24.4
Services	44.1	Change in stocks	0.0
GDP at factor cost incl others	100.0	Exports of goods & services	39.5
		Imports of goods & services	-52.5
		GDP at market prices	100.0

Principal exports 1994	\$ m	Principal imports 1992	\$ m
Fish	208	SNIM-SEM	185.3
Iron ore	163	Food	125.6
		Transport equipment & machinery	51.5
		Consumer goods	40.9
		Petroleum products	30.8

Main destinations of exports 1994 ^e	% of total	Main origins of imports 1994 ^e	% of total
Japan	28	France	23
Italy	15	UK	7
France	14	Germany	6
Spain	11	Japan	6

^a IMF estimates. ^b Official estimate. ^c EIU estimate. ^d Actual. ^e Derived from partners' trade returns, subject to a wide margin of error.

Mauritania

Outlook

The PRDS increases its grip on power—

Mauritania may be a functioning multiparty democracy with over 20 recognised political movements but, as partial elections to the senate illustrated in April, there is really only one that counts. The ruling Parti républicain démocratique et social (PRDS) won every one of the 17 seats it contested in the ballot, conceding the 18th to an independent candidate. The foremost strands of the opposition, the Union des forces démocratiques (UFD) and the Union pour la démocratie et le progrès (UDP), have both been weakened by defections. Although several of those to leave these parties have yet to join other parties, the main beneficiaries have been the PRDS, which as the sole purveyor of power and influence continues to accumulate fresh supporters, and the recently formed Action pour le changement (AC), created in late 1995 with the merger of the Haratine movement El-Hor and the Crisis Committee which split from the UFD in mid-1995 (4th quarter 1995, page 29).

—but the AC also gathers momentum

For many observers this marks a significant shift in the arrangement of Mauritania's political stage, with the rise of the AC (and its possible rapprochement with the ruling PRDS) setting the seal on any hopes of the UFD ever regaining the sort of support it enjoyed just a few years ago. Several facts back this thesis. To begin with, the AC was remarkably quick in winning official recognition, regardless of constitutional provisions that specifically exclude approval of all parties that fail to demonstrate a national character. The party draws the bulk of its membership from two major ethnic groups, the Haratines (black Arabic-speaking descendants of freed slaves) and moderate Soninkés from the southern part of the country. In addition, several Haratines have drifted into the AC's ranks from the PRDS (including at least one ex-minister), and ties between the party's leaders and members of the current administration are reported to be extremely friendly. Furthermore, the AC now provides a backdoor route for moderate but politically ambitious black Mauritians to move closer to the centre of power, without overtly compromising their independence from the mainly Moorish PRDS. Their drift towards the hub of influence has been accelerated by the radicalisation of the erstwhile main opposition group, the UFD, which, under the leadership of Ahmed Ould Daddah, now comprises mainly left-wing radicals refused a hearing by other parties, plus the rump of black Mauritanian opposition which remains vehemently against any form of agreement with the ruling group. A final pointer to the relationship between the AC and the PRDS comes from the series of mini-reshuffles within the cabinet, which, with the entry of prominent moderate black politicians and a continued sprinkling of Haratines, now more closely reflects the national balance of power

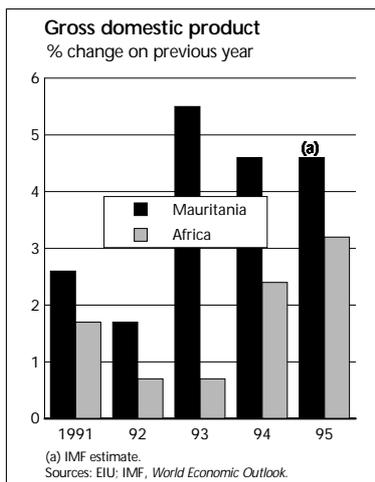
Government changes are mainly political

between ethnic groups and clans than at any time in Mauritania's 36 years of independence.

Members of the government have been playing musical chairs ever since the start of this year. Three cabinet reshuffles have brought changes at the top of most ministries, and some members have barely had the time to warm their chairs before being moved onwards, or out. For example, Sidi Mohamed Ould Biya, who joined the government as finance minister in early 1995, was first moved to the planning ministry in mid-February, to fisheries in mid-March, and lost his seat altogether in the early May reshuffle. Although none of these reshuffles represented a substantial change in the cabinet, involving only three or four moves at a time, together they amount to a major shake-up, as less than half the members of the cabinet confirmed in early January remain in the jobs they held on appointment. These ministerial changes have been attributed to the need to ensure widespread political advantage for the governing party and its current (and likely future) allies at the legislative elections, due in October.

Steady economic progress wins further IMF approval

The cabinet changes are unlikely to bring any variation to the broad stability and consistency in economic management demonstrated by the government. Slow but steady success in restoring Mauritania's budget and commercial balances has won further plaudits from the international donor community. The IMF released the second annual tranche of its current Enhanced Structural Adjustment Facility (ESAF) in mid-April, giving the green light to other donor agencies to maintain their balance-of-payments efforts and sending a positive signal to Mauritania's creditors, in the hope that further debt relief can be granted in the near future. Reforms likely to be introduced in the coming months will include changes to the fisheries sector, where efforts will be directed towards improving domestic handling and treatment plants, severely criticised by European Union (EU) inspectors, and to promoting private-sector efforts to capitalise on the fresh donor resources. Other, lower-profile initiatives will continue to support ongoing programmes designed to enhance the general management of the economy, and to assist with the drafting of new legal codes governing various commercial and financial activities, notably a new investment code aimed at boosting private-sector participation in the economy. GDP is forecast to expand by around 4.8% in 1996, close to the 1995 rate, with inflation being kept below 4% and a further reduction in the current-account deficit.



Review

The political scene

Ministers play musical chairs

The prime minister, Cheikh El Avia Ould Mohamed Khouna, has fine-tuned his cabinet three times since taking office in early January 1996. The first mini-reshuffle, in mid-February, brought an exchange of portfolios involving the ministers of finance, rural development, health and planning. A more sweeping change came five weeks later with the surprise departure of the

foreign minister, Mohamed Salem Ould Lekhal, thought to have been a close confidant of the president, Maaouya Ould Sid'Ahmed Taya, and the architect of the normalisation of relations between Mauritania and Israel; he was replaced by the former education chief, Lemrabott Sidi Mahmoud Ould Cheikh Ahmed. Other changes involved the minister for fisheries and the maritime economy, Baba Ould Sidi, and the minister of planning, Sidi Mohamed Ould Biya, and the return to cabinet rank of Mohamed Ould Amar, who lost his seat in the October 1995 reshuffle that followed the discovery of a so-called Baathist plot (4th quarter 1995, page 29). The third movement took place on May 6, when three ministers were dropped from the government (those responsible for justice, fisheries and culture), while the interior minister, Mohamed Lemine Salem Ould Dah, was redeployed to take charge of the justice portfolio. His replacement by the former governor of Nouadhibou, Dah Ould Abdel Jelil, has been greeted as a positive move by representatives of the independent press. The former interior minister has a reputation as an Arab nationalist and his two-year period in office was marked by periodic clampdowns on the independent press and seizures of various publications (see below). Other newcomers to the cabinet are Abdallahi Ould Nem, as minister for fisheries and the maritime economy, and Mohamed Ould M'Boirick, who takes over as minister for culture and Islamic affairs.

The PRDS sweeps a partial senate election

To no one's great surprise, the ruling Parti républicain démocratique et social (PRDS) emerged from a partial election to the senate in early April with a strengthened position. Ballots to the 56-seat senate are organised according to a system of electoral colleges, composed of directly elected municipal councillors, with one-third of the senate subject to renewal every two years. With a majority in 170 of the country's 206 local councils, the PRDS was in no real risk of losing any of the 17 seats it contested, unless through the unlikely defection of its sponsored councillors. The race was contested by 42 senatorial hopefuls, with the PRDS nominees facing challenges from five representatives of the opposition Union des forces démocratiques (UFD), one member of the newly formed Action pour le changement (AC) and 19 independents (many of whom, as in previous exercises, had been denied the chance to run under the PRDS banner). Only one of the PRDS-backed candidates failed to win an outright majority at the first ballot—he was assured his seat at the run-off election staged one week later—and the 18th seat was secured by an independent candidate.

The UDP boycotts the polls

No other recognised political party put forward candidates although only one, the Union pour la démocratie et le progrès (UDP), actively boycotted the poll. The UDP leader, Hamdi Ould Moukness, claimed that as conditions set out by the opposition for participation in the ballot had not been fulfilled, he could see no point in participating in a flawed exercise. In particular, he cited the government's failure to establish a reliable registration system, to revise the electoral code, to create an independent electoral commission or to allow opposition participation in the compilation and scrutiny of electoral rolls. Furthermore, with the advancement of legislative elections to October, he felt his party's energies would be better directed to consolidating its electoral base in constituencies where it stood some chance of securing victory.

The main independent newspaper is forced to close

Mauritania's most influential independent publication, *Mauritanie Nouvelles*, will not be available until mid-July at the earliest, when a three-month ban imposed by the interior ministry is due to expire. This was but the latest in a series of measures to muffle the paper. In September 1995, after months of absence from the news-stands, *Mauritanie Nouvelles* switched from weekly to daily publication in the hope of ensuring a more regular flow of information. However, in early March, after further issues were "lost" to the censors, the publication reverted to its weekly format, claiming that it could no longer afford to appear every day. Only two of four new-style issues reached the streets and in late March the paper suspended publication pending "clarification" of its position from the interior ministry. In a bid to save the paper, its editor, Bah Ould Saleck, convinced that he was involved in a personal feud with the government, announced his resignation. Finding a new editor proved difficult; Bah remained the main shareholder of the venture, and in the absence of any discernible shift in the paper's editorial stance, he was seen by the government as its guiding hand. The final blow came in early April when the paper was notified that it was to be banned for three months due to its "manifest desire to sow subversion and attack the interests of the country". The paper's management said it would seek a court injunction to allow it to continue; nevertheless, with the publication facing persistent harassment and dwindling finances, few editorial staff were confident of a long-term future with the paper. Their pessimism was relieved somewhat when Mohamed Lemine Salem Ould Dah was moved from the interior ministry in the cabinet reshuffle of early May; although he remains in the government as minister of justice, he no longer has responsibility for the press. Independent publishers hope that his successor will prove less intransigent.

A land mine claims two victims—

Land mines laid during hostilities between Moroccan forces and the nationalist movement of Western Sahara, the Polisario Front, claimed two more victims in mid-February when a Land Rover carrying two Frenchmen was blown up on an undesignated route between Dakhla and Nouadhibou. One man was killed in the explosion; the other was flown to France, where he succumbed to his wounds three weeks later. Relatives of the two men strongly condemned the Mauritanian authorities and the tour operators organising the convoy in which the vehicle was travelling, claiming that public access to such a dangerous region ought never to have been allowed. While sympathising with the grieving families, the organisers of the trip said all members of the convoy had been strictly instructed to keep to the beaten track, precisely because of the danger from unexploded mines.

—a derailment kills three—

The train that transports iron ore from the mine at Zouérate to the port of Nouadhibou is reputed to be the longest and the heaviest in the world, operating in some of its most inhospitable terrain. Virtually all of the 700-km track is laid on sandy ground; frequent sandstorms restrict visibility and rapidly wear all moving parts; and the temperature at noon is around 46°C in the shade, plummeting to around zero during the night and setting up massive temperature stresses in the rails and fixing components. Small wonder, therefore, that the system occasionally breaks down. In late March 40 wagons came off the rails some 125 km from the port, killing three people who had hitched a ride, seriously wounding three more and causing considerable material damage.

Emergency crews toiled for a week before repairs could be carried out and iron-ore shipments resumed.

—and a military aircraft crashes on a training exercise

The Mauritanian Air Force was still awaiting delivery of the second of two reconditioned DC-9 military aircraft, acquired from China, when in early April the first crashed into the sea off Nouadhibou. The plane developed engine trouble shortly after taking off on a training mission and ditched in shallow water. Only two of the eight-man crew survived, including the pilot and one of two Chinese instructors.

Gulf relations wax stronger

A delegation of Kuwaiti parliamentarians arrived in Nouakchott in late March, the first such visit since the erection of diplomatic barriers in the wake of Mauritania's support for Iraq's Saddam Hussein in the Gulf war. Relations with Iraq have been strained since the arrest of 52 pro-Baathist Mauritania last October (4th quarter 1995, page 28), a move which has allowed Mauritania to retie most of its links with the moderate Arab states and Western countries that supported Kuwait during the conflict.

Mauritania hosts an African defence summit

Six of the seven francophone states grouped in the regional Accord de non-aggression et d'assistance en matière de défense (ANAD) met in Nouakchott in late April in a bid to revive their moribund pact. The heads of state of Senegal, Mali, Côte d'Ivoire, Burkina Faso and Mauritania were joined by the defence ministers of Niger and Benin, which is not a member of ANAD but is interested in joining. The only absentee was Togo, apparently displeased that ANAD had failed to support its appeals for assistance in a recent border clash with Ghanaian troops. The meeting elected the Senegalese president, Abdou Diouf, as its chairman and resolved to set up a joint peacekeeping force that may be called upon to serve in any member country. Apart from demonstrating the desire of the various participants to open a further channel for the resolution of regional differences, the occasion represented a significant diplomatic coup for Mauritania, which used the summit to inaugurate its newly built Palais des Congrès.

Malnutrition is reported in Tuareg refugee camps

A visit in February to refugee camps in south-east Mauritania by the office of the UN High Commissioner for Refugees (UNHCR) found many children among the estimated 34,000 Malian Tuareg refugees to be suffering from malnutrition. The refugees, who started to arrive four years ago, rose to number over 42,000 in 1995. Although only 8,000 have returned since the signing of a truce in June last year, the UNHCR representative found that a further 5,500 had registered to leave in future convoys. Despite the annual grant of \$3.5m towards food for the two camps, at Bassikounou and M'Berra (not including other aid supplied by the UN World Food Programme), the UNHCR spokesman said much more needed to be done and a greater emphasis should be placed on providing help for those seeking to return home. Despite relatively plentiful supplies of certain foods, some basic commodities remain in short supply (notably vegetables and cereals); daily rations of grains and beans have been cut below the minimum required for basic nutrition, and doctors reported at least 30 new cases of severe child malnutrition every day.

Mauritanian refugees in Senegal agree to return home

Mauritanian refugees who have been living in northern Senegal since 1989 seem to have abandoned hope of receiving further moral and material support, and decided to go back home. Ever since food aid was suspended by various aid agencies last year, following the normalisation of relations between Mauritania and Senegal (1st quarter 1996, page 29), the refugees have been under considerable pressure to return north of the border. A sizeable number of the 70,000 people once thought to be camping along the banks of the Senegal river have already drifted home—some under the supervision of the Association des réfugiés mauritaniens au Sénégal (ARMS), which in the absence of help from international organisations has dropped some of its preconditions for an orderly return and has started to refurbish abandoned villages and sites in Mauritania to receive the returnees. This initiative has caused a rift between those claiming to speak for the refugees. A rival group, the Association des mauritaniens réfugiés au Sénégal (AMRS), has declared its hostility to the move, calling it a ruse by the Mauritanian government and its “acolytes”. The AMRS continues to refuse to entertain any thought of returning without prior recognition by Mauritania of the refugees’ right to citizenship and full restitution of their property; it also wants any recrossing of the river to be supervised by the UNHCR. Dozens of refugees briefly occupied the UNHCR offices in Dakar (Senegal) in early February to protest at the decision to suspend food aid and subsidies for medical supplies, which they claimed was part of an orchestrated campaign by the Mauritanian regime, aimed at forcing them to return home without assurances of their rights.

The economy

Mauritania remains firmly in the good books of the IMF—

In mid-April the IMF approved the release of the second annual loan under Mauritania’s ongoing Enhanced Structural Adjustment Facility (ESAF) agreement, initially approved in January 1995 (1st quarter 1995, page 33). The SDR14.25m (\$21m) credit will be disbursed in two equal semi-annual instalments, the first of which was paid with announcement of the approval. Commenting on Mauritania’s economic record, the IMF said that progress had been consistent with the established medium-term strategy, sustaining GDP growth at around 5% in each of the past three years while cutting inflation from 9.3% in 1993 to 6.5% in 1995. Over the same period, the budget deficit had been almost eliminated, and the overall balance-of-payments situation had improved markedly. In addition, structural reforms had brought a unified market-based exchange rate, improved the fiscal profile with the introduction of a system of value-added tax (VAT) and laid the groundwork for the establishment of a sound banking system.

—with fresh funding to help reforms—

The newly approved credits will be used to sustain the government’s programme for 1996. This intends to continue reform efforts already under way and aims to reduce further the current-account deficit to just 6.4% of GDP, compared with over 21% in 1993. The IMF expects official exchange reserves to rise to the equivalent of over three months’ import cover, having fallen to less than one month in 1994; economic growth is expected to maintain momentum at around 4.7%, about the same as last year, and it is hoped that inflation will fall to about 3.5%. There is a reasonable chance that Mauritania will attain its goals. Despite a widening domestic food deficit and the risk of a slight

shortfall in fish export volumes (see Agriculture and fisheries), improving prices and further growth in iron-ore production from the state-owned Société nationale industrielle et minière (SNIM) should sustain the positive trade balance. (Iron-ore exports increased by 10% to 11.5m tons in 1995.) In addition, further debt relief may not be too far away, with a likely debt-stock reduction by the Paris Club group of creditors.

The IMF's view of the economy

	1995 ^a	1996 ^b	1997 ^b	1998 ^b
Real GDP growth (%)	4.6	4.7	4.8	4.8
Consumer price inflation (%)	6.5	3.5	3.0	3.0
Budget balance ^c (% of GDP)	-0.8	0.8	1.6	2.5
Current-account balance ^c (% of GDP)	-8.1	-6.4	-5.3	-4.3
Exchange reserves (months of imports)	1.8	3.1	4.1	4.4

^a Estimates. ^b Forecasts. ^c Excluding grants.

Source: IMF.

—which will stress private-sector development

Structural reforms in the coming months will concentrate on boosting private-sector participation in the economy. Reforms in the civil and commercial legal codes are planned, and a raft of new incentives are expected to encourage the production and transformation of local resources for export. The investment code is being rationalised and procedures for company registration are being streamlined. Fiscal measures are set to widen the tax net, through tighter administration, and to boost import revenue through changes to the list of tariffs. Strict controls on public expenditure are to be maintained for the foreseeable future, although the government says social measures will not be neglected. Programmes for the next few years will be introduced to increase school enrolment and adult literacy, with special emphasis on boosting the participation of women, which in turn will aid efforts to reduce population growth. Other poverty alleviation schemes include programmes for grass-roots development and the promotion of small-scale urban workshops (both within and outside the formal sector), with the stress being placed on labour-intensive public works and the improvement of credit allocation to small entrepreneurs.

France will give more support for public finance management—

France, a major backer of Mauritania's efforts to improve public finances in recent years, has agreed to extend its commitment by disbursing a further FFr10m (\$1.9m). The loan will be used to sustain technical assistance programmes already provided to tax and Treasury authorities, with the aim of improving their capacity in planning and financial management.

—and the World Bank is to fund an urban development scheme

Shortly before he was moved to the rural development ministry, the then planning minister, Mohamed Ould Ch'bih Ould Cheikh Melanine, travelled to Washington to meet World Bank officials and discuss progress in setting up and funding a new urban development project. The project will be one phase of a wider programme of decentralisation and municipal development, already approved by the government; this also aims to boost labour-intensive activities

and employment opportunities in urban areas, by strengthening the availability of infrastructure and support services for new entrepreneurs through the consolidation of local authority institutions. The formal signature of a \$14m credit from the International Development Association to back the project was announced in late March.

Agriculture and fisheries

France backs the war
against locusts

A subsidy of FFfr5m (\$967,000) has been granted by France to help Mauritania in its fight to control locust swarms, notably in the northern parts of the country. The new operation, called "Ecoforces", started early this year with two aircraft being used in a spraying blitz in the region of Tiris Zemmour. This has been identified as one of the main breeding centres for the insects, which then sweep into the agricultural zones of southern Mauritania and northern Senegal. The operation was particularly important this year, as good rains fostered ideal breeding conditions, and the task force will remain on stand-by to repeat the exercise should there be evidence of increased locust activity. The *Desert Locust Bulletin*, published by the UN Food and Agriculture Organisation (FAO), has noted the relative success of the measures, reporting limited sightings of immature insects in the sprayed region, although potentially larger swarms were spotted further north.

A yawning food deficit
brings pledges of food aid

Representatives of the UN World Food Programme (WFP) have warned that Mauritania faces a widening food deficit in 1996. Figures produced by the rural development ministry support these claims; they indicate a 4% decline in domestic cereal production in 1996, to 192,600 tons, due mainly to a reduction of the area under cultivation, but also due to heavy rains, which left up to 7% of seeds waterlogged. The national food security agency has launched an international appeal for aid to meet the expected shortfall. In mid-March it said that 21,000 tons had been pledged, including 4,000 tons of wheat from Spain.

Europe bans imports of
Mauritanian fish

Mauritania could lose a sizeable proportion of its fish export revenue this year if the European Union (EU) maintains a three-month ban imposed on Mauritanian produce in April. Experts from the EU Veterinary Commission inspected onshore treatment plants earlier this year and concluded that hygiene standards were below the minimum acceptable for European consumers. Mauritania was given two months' notice to improve the situation and received financial assistance towards its efforts to upgrade facilities, but standards failed to rise and the ban came into effect. Foreign companies fishing in Mauritanian waters and exporting direct to Europe are not covered by the ban, which local fishing representatives have called "severe and unjust". Local fishermen will find it difficult to secure alternative markets, and impossible to sell their catches on the small domestic market.

The World Bank threatens
to suspend dam funding

The World Bank has issued a critical report on the activities of the Organisation pour la mise en valeur du fleuve Sénégal (OMVS), saying, in particular, that its failure to manage annual releases of water from the Manantali dam in Mali was causing disease and disruption to agricultural activities downstream. The study claims a steady increase in the incidence of bilharzia, malaria and other

insect-related diseases since the authority suspended annual flooding of the plains below the Manantali and Diama dams a decade ago. In some villages, according to the report, all inhabitants are infected with bilharzia, which was unknown in the region ten years ago. The snails that carry the disease cannot breed in irregular river flows but thrive in the slow-moving waters that have resulted from construction of the dams. These conditions have also contributed to the development of fertile breeding sites for malarial mosquitoes. In addition, keeping the dam sluice gates closed has deprived farmers along the river banks of the annual floods which promoted traditional root and food staples, and they have been forced to turn to irrigated crops (mainly rice and sugar). Furthermore, establishment of a sugar-cane mill in the delta region below Diama has attracted more migrant workers than it can accommodate. Overcrowding, coupled with poor sanitation and stagnant water, has increased the risk of disease, and outbreaks of cholera and dysentery have been reported. In short, the report concludes that although the dams were supposed to improve the lives of the people, nutritional levels have not gone up and there is evidence that they have even declined. The World Bank has threatened to suspend credits awarded for the installation of new turbines at the Manantali dam unless the recommendations of the report are adopted, notably the requirement to resume annual flooding, which, they claim, would not substantially reduce energy-generating capabilities.

Energy, mining and transport

German companies are favoured to win contracts with SNIM—

Two German firms emerged at the top of a list of bidders to supply mechanical engineering parts for a grinding project for the state iron-ore mining company, Société nationale industrielle et minière (SNIM), at its Nouadhibou terminal. GTMH and Koch submitted offers of around UM1bn (\$7.3m) to supply the equipment, with a further UM300m-500m being quoted to supply technical assistance and undertake civil engineering works. The project is being funded by a loan from the European Union's Sysmin fund.

—which signs two new loan deals with the EIB—

In mid-April SNIM secured two loans from the European Investment Bank (EIB), for a total of Ecu3.4m (\$4.2m); Ecu1.4m is earmarked for building a new foundry at Nouadhibou, while Ecu2m will go towards the construction of a new workshop, also in Nouadhibou, to provide engineering services for local agriculture and fishing as well as SNIM's own operations.

—and also has plans for a five-star hotel

Unrelated to its mining activities, SNIM, through its hotel subsidiary, Somasert, has announced plans to build a new five-star hotel in the Mauritanian capital. Land for the project has already been acquired close to the Palais des Congrès, completed recently with Chinese aid, and work is expected to start in the coming months. In addition, Somasert is undertaking refurbishment of the Marjaba Hotel in Nouakchott, owned in a joint venture with the regional airline, Air Afrique.

Australian miners win further concessions to seek minerals

Following the granting of significant mining concessions to an Australian mining company, General Gold International (1st quarter 1996, page 33), Australia's Eston Corporation has received approval for its application to conduct surveys

and prospect for metallic mineral ores in Mauritania. It will look mainly for gold- and silver-bearing lodes, although searches will also be mounted for deposits of copper, nickel, lead, zinc, platinum and related metals.

MORAK is wound up but
GEMAK resumes

Mining operations at the Mines d'or d'Akjoujt (MORAK), established to recover gold from copper fines stockpiled close to the old copper mine, were wound up in early 1996 as the 2.5m-ton deposit became depleted. Nevertheless, the partners in the project have decided to open a new company, GEMAK, to exploit an estimated 25m tons of sulphurous copper reserves found deeper below the site. Feasibility studies have been commissioned to evaluate the economic potential of the site. Current estimates put the price-tag for opening the deep mine at approximately \$100m, with preliminary exploration estimated to take up to two years before a final decision to mine can be taken.

French companies are
well-placed for Manantali
contracts

Despite failing to submit the cheapest offer to supply electro-mechanical equipment for the Manantali hydroelectric dam project, the French company Spie-Enertrans is well-placed to secure the deal, due to its technical expertise and the tied nature of aid provided to fund the scheme. This information was leaked following a ministerial meeting of the Organisation pour la mise en valeur du fleuve Sénégal (OMVS) in late February. The main backers for the project are the French state development bank, Caisse française de développement, and its German counterpart, Kreditanstalt für Wiederaufbau (KfW), each funding 40% of the total. Further assistance is being provided by the Canadian development agency, CIDA, although this contribution has been put in some doubt following the Canadians' reduced commitment to funding the Garafiri hydroelectric scheme in Guinea (also suffering from the withdrawal of funding from the World Bank), coupled with the threat of reduced World Bank backing for OMVS dam projects (see Agriculture and fisheries).

New road schemes may
start soon

Longstanding plans to upgrade the road link from Aioun to Nioro (in Mali) are coming closer to fruition. Several years of conflict between Tuareg rebels and the Malian government have severely reduced maintenance of the existing route, although the threat of guerrilla action has also brought a significant reduction in the number of vehicles risking the passage. The prospect of an end to the conflict has encouraged renewed attention to upgrading the rapidly deteriorating link, which will become even more important if Malian plans to use the port of Nouakchott as a major trading post are to materialise. In a separate move, the African Development Bank has released some \$13.5m for upgrading the road between Akjoujt and Atar. The funds are sufficient to pay for the construction of 100 km of road, roughly half the distance between the two towns, and talks are advancing towards securing the estimated \$10m needed to complete the project. Construction of the road from Nouakchott to Akjoujt continues to progress, at a rate of roughly 20 km per month, with completion expected sometime in the middle of this year.

Foreign trade and payments

Aid levels fall back from
the high of 1993

The latest edition of the OECD Development Assistance Committee (DAC)'s *Geographical Distribution of Financial Flows to Aid Recipients* shows that total net

aid to Mauritania fell to \$269.1m in 1994 from a high of \$328.1m in 1993. Nevertheless, net aid in 1994 remained above the levels seen in the early 1990s. Bilateral aid fell to \$117.7m from \$190.4m in 1993, with the biggest donor, France, giving \$66.2m. This was partly offset by a slight rise in multilateral aid in the same period, to \$151.4m from \$137.7m, with \$44.9m coming from the European Union. As a result, multilateral aid accounted for more than half of the total in 1994.

Net official development assistance^a

(\$ m)

	1992	1993	1994
Bilateral	109.0	190.4	117.7
of which:			
France	71.9	108.3	66.2
Japan	6.6	55.3	34.1
Germany	19.1	13.2	18.9
Multilateral	93.1	137.7	151.4
of which:			
EU	42.9	52.4	44.9
IDA	12.2	27.1	33.3
IMF	10.0	7.1	18.3
Total	202.1	328.1	269.1

^a Disbursements minus principal repayments on earlier lending. Official development assistance is defined as grants and loans with at least a 25% grant element, provided by OECD and OPEC member countries and multilateral agencies, and administered with the aim of promoting development and welfare in the recipient country.

Source: OECD, *Geographical Distribution of Financial Flows to Aid Recipients*.

Other aid news

Recent aid agreements have included the following.

- Food aid from France valued at FFr1m (\$193,000), comprising milk, sugar and edible oils, for infant nutrition centres throughout the country.
- A subsidy from Japan amounting to UM6.5m (\$48,000) to support three market garden projects in the regions of Adrar, Gorgol and Trarza, aimed at improving rural living conditions while boosting food supplies to urban centres.
- \$1.8m from Spain towards the rehabilitation of Mauritania's historic towns, notably the old trading post of Oualata.

Appendix 1

Quarterly indicators of economic activity in Senegal

		1993		1994				1995			
		3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr
Prices: Dakar	Monthly av										
Consumer prices:	1990=100	99.6	98.5	117.7	124.9	135.3	138.3	134.0	135.6	143.0	144.3
change year on year	%	1.5	0.1	22.1	30.4	35.8	40.4	13.8	8.6	5.7	4.3
Money & banking	End-Qtr										
M1, seasonally adj:	CFAfr bn	189.8	195.8	224.4	256.8	284.2	298.8	300.1	280.6	318.6	312.2
change year on year	%	-7.1	-9.2	14.8	32.9	49.8	52.6	33.8	9.3	12.1	4.5
Discount rate	% per year	12.50	10.50	14.50	12.00	10.00	10.00	9.00	8.50	8.50	7.50
Foreign trade ^a	Qtrly totals										
Exports fob	CFAfr bn	33.75	33.26	47.22	51.05	45.51	44.94	70.54	80.16	68.23	61.91
Imports cif	"	65.90	73.09	78.69	100.91	97.45	111.44	160.43	163.17	131.89	167.48
Exchange holdings	End-Qtr										
Central Bank:											
gold ^b	\$ m	8.2	8.1	8.4	8.3	8.4	8.4	8.2	8.4	8.4	8.4
foreign exchange	"	5.5	1.5	9.3	2.8	45.2	176.9	244.2	275.5	277.4	266.2
Exchange rate											
Market rate	CFAfr:\$	283.2	294.8	571.0	547.2	528.2	534.6	484.9	485.3	491.5	490.0 ^c

Note. Annual figures of most of the series shown above will be found in the Country Profile.

^a *DOTS* estimate. ^b End-quarter holdings at quarter's average of London daily price less 25%. ^c End-1 Qtr 1996, 503.2.

Appendix 2

Quarterly indicators of economic activity in The Gambia

		1993	1994				1995				1996
		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	126.2	126.9	128.8	126.8	132.4	134.6	136.3	140.9	139.2	138.7 ^a
change year on year	%	5.5	3.7	-0.9	-0.6	4.9	6.1	5.8	11.1	5.1	n/a
Money	End-Qtr										
M1, seasonally adj:	D m	460.5	445.0	416.8	399.6	405.5	399.4	449.1	446.5	468.7	494.3 ^b
change year on year	%	5.4	5.5	-5.4	-11.6	-11.9	-10.3	7.8	11.7	15.6	n/a
Foreign trade	Qtrly totals										
Exports fob	D m	84.05	138.64	96.37	37.24	65.56	72.19	38.61	25.53	12.15 ^c	n/a
Imports cif	"	601.29	611.88	494.71	465.38	430.93	350.08	315.72	315.38	201.70 ^c	n/a
Exchange holdings	End-Qtr										
Monetary authorities:											
foreign exchange	\$ m	101.26 ^d	109.20	101.61	96.19	95.59	95.99	98.09	97.98	103.81	108.42 ^e
Exchange rate											
Market rate	D:\$	9.535	9.701	9.521	9.480	9.579	9.372	9.542	9.630	9.640	9.730 ^e

Note. Annual figures of most of the series shown above will be found in the Country Profile.

^a January only. ^b End-January. ^c Total for October-November. ^d End-November. ^e End-February.

Appendix 3

Quarterly indicators of economic activity in Mauritania

		1993	1994				1995				1996
		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	128.9	127.9	131.5	134.8 ^b	n/a	n/a	n/a	n/a	n/a	n/a
change year on year	%	0.5	2.5	5.3	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Money	End-Qtr										
M1, seasonally adj:	UM m	21,697	20,050	20,309	17,492	20,535	19,613	19,773	18,943 ^c	n/a	n/a
change year on year	%	3.6	-7.9	-0.4	-14.9	-5.4	-2.2	-2.6	n/a	n/a	n/a
Foreign trade ^d	Annual totals										
Exports fob	\$ m	423	(464)	(n/a)	n/a)	n/a
Imports cif	"	570	(589)	(n/a)	n/a)	n/a
Exchange holdings	End-Qtr										
Foreign exchange	\$ m	44.4	44.0	39.2	46.0	39.7	70.9	61.5	73.4	85.4	84.3 ^e
Exchange rate											
Market rate	UM:\$	124.16	122.53	123.55	124.12	128.37	125.28	130.16	134.05	137.11	135.87 ^e

Note. Annual figures of most of the series shown above will be found in the Country Profile.

^a Mauritanian households. ^b July only. ^c End-August. ^d DOTS estimate. ^e End-February.

Appendix 4

Foreign trade of Senegal

	\$ '000		
	Jan-Dec 1989	Jan-Dec 1990	Jan-Dec 1991
Imports cif			
Dairy products	42,881	46,490	41,737
Cereals & products	156,476	180,544	115,011
Sugar & products	9,280	36,534	8,115
Beverages, tobacco & manufactures	29,760	29,334	15,303
Mineral fuels	361,029	258,680	120,418
of which:			
crude petroleum	353,105	248,628	91,437
Animal & vegetable oils & fats	19,444	33,186	50,056
Chemicals	147,478	157,626	155,127
Manufactured goods	218,592	259,763	168,130
of which:			
cotton yarn & fabrics	41,953	45,534	28,620
iron & steel	49,060	64,911	39,688
metal manufactures	46,682	51,875	34,161
Machinery incl electric	190,655	235,195	177,720
Transport equipment	119,713	109,294	71,311
of which:			
road vehicles	107,002	102,329	66,665
Total incl others	1,533,973	1,620,419	1,096,951
Exports fob			
Fish & products	208,121	216,041	215,256
Oilseed cakes	39,112	35,366	17,451
Cotton, raw	10,718	9,533	20,248
Phosphates, mineral	63,875	56,962	43,926
Salt	6,330	7,820	n/a
Mineral fuels	84,515	96,768	104,390
Groundnut oil	102,828	129,980	69,534
Chemicals	97,452	116,680	95,110
Machinery & transport equipment	28,197	18,470	13,695
Total incl others	750,884	782,600	652,208

	\$ m				\$ m		
	Jan-Dec 1992	Jan-Dec 1993 ^a	Jan-Dec 1994 ^a		Jan-Dec 1992	Jan-Dec 1993 ^a	Jan-Dec 1994 ^a
Exports fob				Imports cif			
France	185	140	165	France	389	442	400
Italy	39	50	54	Cameroon	74	83	92
Mali	37	44	50	Nigeria	72	78	81
Cameroon	27	37	47	Italy	70	48	63
Iran	22	22	23	Thailand	35	56	54
Spain	14	14	23	USA	71	76	47
Guinea	15	18	21	Belgium-Luxembourg	37	40	44
Germany	9	14	16	UK	22	24	35
Netherlands	25	11	15	Netherlands	29	29	34
India	105	19	15	Japan	44	34	30
USA	3	8	12	Portugal	3	3	26
Total incl others	682	573	635	Total incl others	1,170	1,202	1,169

^a DOTS estimate.

Appendix 5

Foreign trade of The Gambia

	D '000				
	Jan-Dec 1990	Jan-Dec 1991	Jan-Dec 1992	Jan-Sep 1992	Jan-Sep 1993
Imports cif					
Food	522,882	566,846	690,667	457,405	412,552
Beverages & tobacco	77,554	72,048	87,493	63,746	88,856
Crude materials	14,617	21,369	20,974	13,881	48,947
Mineral fuels	136,827	195,582	167,364	135,002	96,805
Animal & vegetable oils	22,701	36,661	74,083	45,438	58,690
Chemicals	95,590	149,831	120,733	85,744	83,205
Manufactured goods	310,363	358,011	363,327	245,914	285,120
Machinery & transport equipment	237,797	310,445	413,348	297,749	413,349
Total incl others	1,932,744	1,932,744	2,081,387	1,483,760	1,617,061

	Jan-Dec 1990	Jan-Dec 1991	Jan-Dec 1992	Jan-Sep 1991	Jan-Sep 1992	Jan-Jun 1993
Exports fob						
Fish & preparations	32,809	36,019	19,429	26,515	13,412	10,218
Groundnuts, shelled	63,483	40,433	n/a	40,433	25,660	n/a
Groundnut oil	38,637	18,197	n/a	10,288	0	n/a
Groundnut meal	7,788	9,978	n/a	9,226	6,362	n/a
Total incl others	320,066	371,358	565,734	280,422	472,977	311,449

	\$ m				\$ m		
	Jan-Dec 1992 ^a	Jan-Dec 1993 ^a	Jan-Dec 1994		Jan-Dec 1992 ^a	Jan-Dec 1993 ^a	Jan-Dec 1994
Exports fob				Imports cif			
Belgium-Luxembourg	119	59	n/a	France	24	30	25
Italy	45	n/a	n/a	UK	39	39	22
Japan	33	35	n/a	Belgium-Luxembourg	22	24	13
UK	5	8	8	Netherlands	18	22	13
Switzerland	2	n/a	3	Germany	16	15	13
Spain	5	2	2	China	57	77	11
Guinea	8	10	1	Pakistan	7	1	10
Hong Kong	5	4	n/a	Hong Kong	62	42	9
Total incl others	232	154	35	Total incl others	392	376	209

^a DOTS estimate.

Appendix 6

Foreign trade of Mauritania

	UM m			
	Jan-Dec 1989	Jan-Dec 1990	Jan-Dec 1991	Jan-Sep 1992
Imports cif				
Food	8,235	7,147	5,258	8,190
of which:				
tea, sugar & rice	4,317	2,507	1,533	4,010
Transport & equipment	1,318	2,298	1,564	1,740
of which:				
vehicles	530	530	352	638
Construction materials	706	623	341	1,137
Fuels	2,630	2,675	1,889	1,773
Total incl others	18,838	19,362	13,123	17,321
Exports fob				
Fish & products	21,297	16,647	21,167	13,894
Iron ore	15,035	18,918	19,060	9,806

	\$ m				\$ m		
	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994		Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994
Exports fob ^a				Imports cif ^a			
Japan	138	107	129	France	166	149	137
Italy	58	75	69	Germany	37	24	36
France	46	63	63	China	16	5	35
Spain	49	46	53	Spain	48	48	30
Côte d'Ivoire	21	25	29	Belgium-Luxembourg	29	27	29
Belgium-Luxembourg	39	21	24	Italy	42	27	22
Total incl others	449	423	464	Total incl others	599	570	589

^a *DOTS* estimate.

Appendix 7

French trade with Senegal and Mauritania

(\$ '000)

	Senegal			Mauritania		
	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994
Exports fob						
Food, drink & tobacco	78,799	83,766	63,857	42,590	45,255	29,759
of which:						
dairy products	35,429	37,177	21,861	9,334	4,262	3,470
cereals & preparations	19,512	25,611	27,130	19,744	21,068	15,682
sugar & products	4,678	5,913	1,201	9,811	15,775	4,064
Mineral fuels	4,871	12,181	16,434	9,369	17,291	6,090
Chemicals	83,732	79,154	63,796	16,172	16,694	15,547
Rubber manufactures	5,526	4,971	5,069	3,679	2,486	4,426
Paper & manufactures	9,847	8,980	7,038	1,405	1,178	1,033
Textile fibres, yarn & manufactures, incl clothing	9,658	9,021	6,382	2,467	2,162	2,262
Non-metallic mineral manufactures	7,038	6,808	6,615	1,876	1,482	1,415
Iron & steel	11,228	14,927	6,982	4,340	1,355	1,995
Metal manufactures	14,264	12,124	9,874	9,763	5,874	5,761
Machinery incl electric	113,857	100,224	86,770	36,810	33,041	37,944
Transport equipment	44,002	33,593	27,867	11,945	9,394	23,276
Scientific instruments etc	16,847	9,548	9,667	3,104	2,568	3,506
Total incl others	448,800	421,460	363,374	149,705	142,516	138,215
Imports cif						
Fish & products	106,620	97,476	94,836	1,477	4,221	4,841
Crude fertilisers & minerals	8,117	6,397	6,392	0	1	1
Metalliferous ores & scrap	853	477	538	50,069	65,979	66,069
Petroleum & products	0	0	0	0	1,570	0
Animal & vegetable oils & fats	32,060	29,969	47,380	0	0	0
Total incl others	178,584	161,822	183,113	52,196	72,873	72,673

Appendix 8

Japan's imports from Mauritania

(\$ '000)

	Jan-Dec 1991	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995
Imports cif					
Fish & products	118,609	146,023	113,569	138,414	n/a
Total incl others	125,926	151,100	117,550	140,861	178,749