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**COUNTRY REPORT**

**Senegal**  
**The Gambia**  
**Mauritania**

**4th quarter 1996**

The Economist Intelligence Unit  
15 Regent Street, London SW1Y 4LR  
United Kingdom

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## The Economist Intelligence Unit

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ISSN 1350-7079

### Symbols for tables

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

# Contents

3	Summary
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## Senegal

5	Political structure
6	Economic structure
7	Outlook for 1997-98
9	Review
9	<b>The political scene</b>
13	<b>The economy</b>
15	<b>Agriculture and fishing</b>
17	<b>Industry and mining</b>
18	<b>Energy and transport</b>
18	<b>Foreign trade and payments</b>

## The Gambia

20	Political structure
21	Economic structure
22	Outlook for 1997-98
23	Review
23	<b>The political scene</b>
27	<b>The economy</b>
28	<b>Foreign trade and payments</b>

## Mauritania

30	Political structure
31	Economic structure
32	Outlook for 1997-98
33	Review
33	<b>The political scene</b>
37	<b>The economy</b>
39	<b>Agriculture and fisheries</b>
40	<b>Energy, mining and transport</b>
41	<b>Education, environment and health</b>
41	<b>Aid news</b>

42	Quarterly indicators and trade data
----	-------------------------------------

## List of tables

8	Senegal: forecast summary
16	Senegal: cereal output
19	Senegal: balance of payments
29	The Gambia: balance of payments
33	Mauritania: results of legislative elections

- 42 Senegal: quarterly indicators of economic activity
- 42 The Gambia: quarterly indicators of economic activity
- 43 Mauritania: quarterly indicators of economic activity
- 43 Senegal: foreign trade
- 44 The Gambia: foreign trade
- 45 Mauritania: foreign trade
- 46 Senegal and Mauritania: French trade
- 46 Mauritania: Japan's imports

### List of figures

- 9 Senegal: gross domestic product
- 9 Senegal: CFA franc real exchange rate
- 23 The Gambia: gross domestic product
- 23 The Gambia: dalasi real exchange rate
- 32 Mauritania: gross domestic product

November 18, 1996 **Summary**

4th quarter 1996

- Senegal** Outlook for 1997-98: The forthcoming local elections on November 24 continue to divide the PS-led unity government. The partial devolution of power to the regions provides the best outlet for the local grievances, such as those of the Casamance region, where armed separatists continue to observe a truce. Despite the end of the IMF programme, the draft 1997 budget expects both a reduction in the fiscal deficit and continued economic recovery. The EIU forecasts real GDP growth of 4% in 1997 and 1998, with the rate of inflation at 3% and 2.5% respectively. The growth in exports is set to narrow the trade deficit, although the current-account deficit will widen slightly after 1996.
- Review: The ruling PS continued to act to reconcile its internal divisions ahead of the local elections, in which it is bound to lose some ground to the PDS and other opposition parties. A retired general stands in Casamance, appealing to regional unrest but rejecting MFDC calls for independence. The government has announced a draft budget for 1997, which increases further the domestic tax base, in the midst of separate strikes by UNACOIS, teachers and railworkers. Favourable rains continue to improve prospects for next year's crop season. An integrated fertiliser giant has been formed with the merger of ICS and CSPT. The balance-of-payments position improved in 1994 and 1995, with sharp increases in exports and considerable capital inflows.
- The Gambia** Outlook for 1997-98: Colonel Jammeh's entirely expected victory in the highly flawed presidential election gains him only lukewarm international approval ahead of the legislative elections, which have been delayed again, to January 2, 1997. The January poll's legitimacy will be weakened by the UDP's boycott. The economy will continue to strengthen, with growth of 3-3.3% forecast for 1996/97, as Western tourists come back and the prospect of a return to normal international relations improves, with the consequent resumption of international aid.
- Review: During the presidential campaign the opposition alleged widespread intimidation and fraud. Colonel Jammeh's main rival sought temporary refuge in the Senegalese embassy on polling day, claiming to fear for his life, although he re-emerged a few days later. Within days of being elected the new president dissolved the military council, leaving its appointed cabinet to rule until the legislative elections. The economy has remained firm and the external sector balanced, raising questions as to the sources of funds replacing the withdrawal of the traditional donors.
- Mauritania** Outlook for 1997-98: The PRDS is assured of its predominance for the foreseeable future following an almost total whitewash in the legislative elections. With a continuation of the reform programme, backed by the international donors, the economy is set to grow by 4.7% in 1996, leaving the incumbent president in a commanding position for next year's presidential election.

Review: The emphatic win by the PRDS has highlighted the weaknesses of the divided opposition parties, none of which could field a candidate in every constituency. The PLEJ boycotted the election, and was joined by the UFD in the second round. The economy has remained strong, foreign reserves doubled during 1995 and the World Bank has described domestic debt as negligible. However, Mauritania may not meet the strict criteria for the new external debt-relief plans put forward by the multilateral donors. The tax system has been revised, with a reduction and simplification of the import-duty regime, the removal of many exemptions and privileges and a change to VAT. BMCI has reported an increase in profits while Canada has helped to launch a new savings bank. A locust warning has been issued. Mauritania has won a debate with the EU over a fisheries pact. The ADB has approved a \$12.8m loan towards road upgrading. The EU has provided aid to fight cholera while the World Bank has granted funds for education.

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# Senegal

## Political structure

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	
National elections	February 1993 (presidential) and May 1993 (legislative); next elections due in May 1998 (legislative) and 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 within a government of national unity; Parti démocratique sénégalais (PDS); 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-jëf/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 Niassé
	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

### Latest available figures

Economic indicators	1991	1992	1993	1994	1995
GDP at market prices CFAfr bn	1,550	1,613	1,587	2,155	2,427 <sup>a</sup>
Real GDP growth %	0.7	0.9	-0.7	1.5	4.5 <sup>a</sup>
Consumer price inflation %	-1.8	-0.1	-0.5	32.3	7.8
Population <sup>b</sup> m	7.5	7.7	7.9	8.1	8.3
Exports fob \$ m	824	828	719	793	968 <sup>a</sup>
Imports fob \$ m	1,114	1,200	1,102	1,027	1,224 <sup>a</sup>
Current account \$ m	-226	-299	-302	-4	-53 <sup>a</sup>
Reserves excl gold \$ m	13.2	12.4	3.4	179.6	271.8
Total external debt \$ m	3,554	3,634	3,766	3,678	4,100 <sup>c</sup>
External debt-service ratio %	21.1	13.6	8.6	14.6	21.6 <sup>c</sup>
Groundnut production <sup>d</sup> '000 tons	728	579	628	718	791
Exchange rate (av) CFAfr:\$	282.1	264.7	283.2	555.2	499.2

November 15, 1996 CFAfr509.5:\$1

Origins of gross domestic product 1994	% of total	Components of gross domestic product 1994 <sup>c</sup>	% of total
Primary sector	20.3	Private consumption	79.6
Secondary sector	30.5	Government consumption	13.6
Tertiary sector	49.2	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 <sup>c</sup>	\$ 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 1995 <sup>e</sup>	% of total	Main origins of imports 1995 <sup>e</sup>	% of total
France	30.0	France	37.8
Italy	12.8	USA	5.6
Mali	7.3	Thailand	4.8
Spain	5.2	Germany	4.3

<sup>a</sup> Provisional. <sup>b</sup> UN estimates. <sup>c</sup> EIU estimates. <sup>d</sup> Unshelled; crop years (October-September) beginning in calendar years. <sup>e</sup> Derived from partners' trade returns, subject to a wide margin of error.

## Outlook for 1997-98

Decentralisation will alter the country's political dynamics—

After the November 24 local elections, the significant strengthening of the country's local and regional government structures will have major implications for Senegalese political life. Until now, political debate and action have been focused overwhelmingly around Senegal's central political institutions and have been dominated by the urban political elite, based mainly in Dakar. But the introduction of greater political and administrative decentralisation—which the prime minister, Habib Thiam, calls the biggest reform since independence—promises to alter this landscape. New municipalities have been formally established, rural community councils will now be fully elected for the first time, and the ten regional councils, which will begin functioning on January 1, 1997, are to have a degree of administrative and financial autonomy. The Parti socialiste (PS), which has governed since independence, is gambling that it will be able to retain effective dominance, while providing a limited outlet to local grievances, especially in the southern Casamance region, where an armed separatist movement is currently observing a truce. But at the national level, the Parti démocratique sénégalais (PDS), which participates in the unity government, and other, more oppositional parties, believe that a less centralised system offers opportunities for them as well. They may at least be able to use the administrative and fiscal authority of any local governments they capture to build up stronger political machines of their own, whittling away the PS's virtual monopoly of official patronage.

—while the election campaign heightens strains—

The tensions within the unity government of the president, Abdou Diouf, have increased as the election campaign progressed, with the PS secretary-general, Ousmane Tanor Dieng, rebuking the PDS and other participating parties for criticising government policies. He did not need to remind them of the Parti de l'indépendance et du travail (PIT)'s ejection from government in September 1995 to convey the seriousness of such a warning. The PDS initially dismissed Mr Dieng's threat and reaffirmed its desire to remain within the government. The PDS leader, Abdoulaye Wade, who is standing for election in Dakar, a party stronghold, may find the position of mayor over such a large metropolitan area a more attractive political platform than his current post as minister of state at the presidency.

—and puts more pressure on the PS to rein in its bickering factions

The PS leadership has made some progress in calming the bitter factional infighting that has plagued it for some time, and it goes into the elections in a stronger position than many would have predicted just a few months ago. However, serious problems remain, and if the PS does not do well in the elections, the old divisions may resurface with even greater force—and Mr Dieng's rivals within the party will see a chance to undercut his position as the new "rising star". Keeping the PS's own house in order will be important in the post-election period if the government is to turn its attention back to the still unresolved issue of the Casamance insurgency and to ensuring that the economy's improved performance is sustained through further reform.

The IMF stresses continued privatisation—

When presenting the IMF's annual report to the government in late September, the Fund's resident representative, Samba Thiam, praised Senegal's "remarkable"

economic performance over the past two years. But he also pointedly noted that privatisation of the telecommunications and groundnut sectors were two major tasks that remained to be accomplished. The dominant state enterprises in the two sectors have already been offered for sale, and the president, Mr Diouf, has cited further progress on privatisation as one of the key items on the cabinet's agenda for the final months of 1996.

—while the government prepares for less external budgetary support

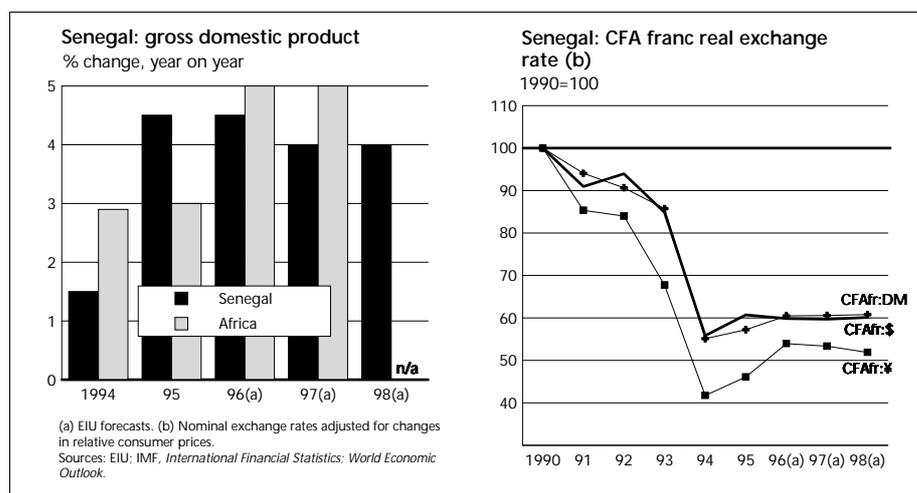
By the middle of 1997, the third and final year of Senegal's Enhanced Structural Adjustment Facility (ESAF) with the IMF will have been concluded, and there are currently no plans for further loans. Consequently, in its draft budget for 1997, the government is planning to mobilise domestic revenue to make up for the loss of external resources. The pressure is thus on to broaden the domestic tax net—although a widely followed strike in August by merchants opposed to the general application of the value-added tax (VAT) system shows that such efforts will be unpopular. The EIU believes that the government's forecasts of real GDP growth and inflation in 1997, of 5% and 2% respectively, are slightly overoptimistic and that the fall in multilateral and bilateral assistance may counteract the continued agriculture-led expansion, leaving growth at a respectable 4% in both 1997 and 1998. While we are forecasting that the average inflation rate will continue to fall to its predevaluation levels—extremely low by African standards—pent-up wage demands may keep it at 3.5% in 1996, falling to 3% in 1997 and 2.5% in 1998.

Better than expected trade statistics published for 1995 have led us to revise our trade forecasts. While both merchandise export and import values were below our original estimates, higher agriculture production—especially of groundnuts—has helped to boost export earnings and moderate the costly importation of food. With good rainfall this trend is expected to continue throughout the forecast period, along with the expansion of other sectors, leading to a slight narrowing of the trade deficit. However, the reduction in transfer receipts will lead to a small widening of the current-account deficit to \$65m in 1998, compared with \$53m in 1995. Our forecasts for the CFA franc exchange rate have also been adjusted, in line with our global economic assumptions. The French franc is now expected to weaken slightly less against the dollar in 1997, before appreciating slightly in 1998, implying an average rate of CFAfr511:\$1 in 1997 and CFAfr505:\$1 in 1998.

Senegal: forecast summary  
(\$ m unless otherwise indicated)

	1995 <sup>a</sup>	1996 <sup>b</sup>	1997 <sup>b</sup>	1998 <sup>b</sup>
Real GDP growth (%)	4.5 <sup>c</sup>	4.5	4.0	4.0
Consumer price inflation (%)	7.8	3.5	3.0	2.5
Merchandise exports fob	968 <sup>c</sup>	1,124	1,272	1,310
Merchandise imports fob	1,224 <sup>c</sup>	1,349	1,474	1,500
Current-account balance	-53 <sup>c</sup>	-45	-60	-65
Average exchange rate (CFAfr:\$)	499	510	511	505

<sup>a</sup> Actual. <sup>b</sup> EIU forecasts. <sup>c</sup> Provisional.



## Review

### The political scene

Local elections strain government unity—

In the run-up to the November 24 local government elections, the contest between the ruling Parti socialiste (PS) and its strongest challenger, the Parti démocratique sénégalais (PDS), grew more heated. Serious political strains emerged publicly within the national unity government led by the president, Abdou Diouf, which is dominated by the PS but includes members of the PDS and two other parties. The PS secretary-general, Ousmane Tanor Dieng, threw down the gauntlet at a campaign rally on September 28, declaring that if Abdoulaye Wade and other PDS leaders continued to attack the government's policies, "they should decide to leave the government; if not we will make them leave". Making it clear that he was referring to both the PDS and the Ligue démocratique-Mouvement pour le parti du travail (LD-MPT), Mr Dieng said that some members of the government voted for official policies during Tuesday cabinet meetings, but then attacked the government's actions the rest of the week, a "double game" that simply could not continue. Neither the PDS nor LD-MPT cabinet members accepted Mr Dieng's invitation to resign their posts, noting that only the president had the authority to dismiss them.

—as the PS is bound to lose ground

In part, the PS's brash posturing reflects the party leadership's deep concern about the implications of the elections. As all the opposition parties boycotted the last local poll in 1990 in protest at the electoral code then in effect, permitting the PS to sweep the board, their active participation this time around means that the ruling party will inevitably lose ground. The only question is by how much. One possible indication of the scale of the PS's problem came in the 1993 legislative elections, when the PDS won a majority of the vote in the two largest cities, Dakar and Thiès. Since then the PS has remained unpopular in the urban areas, which have been hit hardest by the government's austerity measures and by the inflationary impact of the CFA franc devaluation in 1994. The PS can still safely rely on its strong hold in the countryside to carry the

rural constituencies, but will be happy if it can retain a respectable number of urban constituencies as well.

Decentralisation promises to shift some power downward—

In addition, the political stakes involved in local elections are higher, since both the number and powers of local government bodies have been expanded as part of an overall process of administrative and political decentralisation. Among entities up for election on November 24 will be ten regional councils, each of which will be accorded a degree of administrative and financial autonomy. In early September, 12 new municipal communes were recognised, bringing the total in the country to 60, and Greater Dakar was itself further subdivided into 43 wards (*arrondissements*), each with its own council and mayor. In addition, there are 320 rural community councils. Although first created in 1972, they have had control over their own financial management only since 1990 and, like the municipal communes, can build their own schools, health clinics, roads, and other facilities. But November 24 will be the first time the rural councils are fully elected; previously three-quarters of the councillors were elected by universal suffrage, and the remainder nominated by economic, social and cultural associations. In both the rural communities and urban wards, half the councillors henceforth will be elected by majority vote and half by proportional representation.

—increasing uncertainty—

Just how this decentralisation exercise will affect the political scene, firmly dominated by the PS since independence, is not yet clear. The opposition parties sense some opportunity, and the possibility of capturing local positions, now endowed with greater political authority and potential sources of patronage. This represents a risk for the PS, but the party clearly hopes that it can remain in command, relying on its dominance of the state administration and its superior political machine. No other party, not even the PDS, has the resources to field candidates for all the positions up for election.

—while the PDS objects to the subdivision of Dakar

For the PDS and some of the other parties, certain aspects of the decentralisation process, such as the subdivision of Dakar, represent an attempt by the PS to diffuse political authority in the main cities and thus soften the impact of any opposition gains. The PDS leader, Mr Wade, called the division of Dakar into 43 wards “ridiculous”, arguing that some were too small or had no marketplaces (a key source of municipal revenue). Other parties made similar complaints, some suggesting that one motive was to create enough candidacies to placate all of the PS’s disgruntled factional leaders.

The PS acts to pacify its internal factions—

Getting the PS’s own house in order has certainly been a priority for the party leadership, following the March national congress which brought Mr Dieng to the top. The party’s Commission nationale de conciliation has been busy trying to reconcile rival factions around the country, with the aim of presenting a united front in the electoral campaign, halting further defections to other parties and preventing armed factional clashes, like the one in November 1995 that left seven PS members dead. In Rufisque, a suburb of Dakar, the commission succeeded in getting the three main factions there to set up a common election committee. In Pikine, another Dakar suburb where local party structures had been riven for months by bitter internal dissent, overt moves towards

reconciliation are under way, as they are in Ziguinchor, the largest city in the southern region of Casamance, where the PS structures had been paralysed since last year by both factional discord and disruptions by the armed insurgency of the Casamance separatist movement. In Kolda (also in Casamance), as in Kébémér, Bambey, and a number of other areas, factional conflict remains a serious problem. The interior minister's decree in August banning the carrying or transport of arms anywhere in the country until the end of the year was as much directed against rival PS factions as it was intended to head off clashes among supporters of different parties.

—and stipulates a 25% quota for women candidates—

After months of heated debate within the PS, the Central Committee declared in late August that local party structures would have to adhere to a national leadership decision that women comprise at least 25% of all candidates in the local government elections. "The matter is closed," declared Mr Dieng. "The 25% quota will be strictly applied. We will be watching closely." The chairman of the Central Committee session, Madia Diop, told hesitant PS leaders that the party had no choice: "It's the evolution of the world that demands it. Besides, the women are demanding parity—we're not yet to that point." The PS has challenged other parties to establish similar women's quotas. In fact, the And-jéf/Parti africain pour la démocratie et le socialisme (AJ/PADS) and the Rassemblement national démocratique (RND) both have a 25% quota, the former since 1991, while the LD-MPT has a quota of 33%. Neither the PDS nor the Parti de l'indépendance et du travail (PIT) have formal women's quotas, claiming they already have many women leaders and candidates.

—as Mr Dieng builds his own base of support—

Since being named PS secretary-general in March, Mr Dieng has worked assiduously to take the centre stage, projecting the image of an energetic rising star. He is touted as a likely successor to the future president—although the party has already announced that Mr Diouf will again run for president in 2000, when his current seven-year term expires. But this has not dissuaded Mr Dieng from using the election campaign to build his own political stature and base. His frequent speeches at campaign rallies are well reported in the pro-PS daily newspaper, *Le Soleil*; party members wear T-shirts with his picture and initials (OTD); and in September a formal organisation, Mouvement OTD (Ousmane travaille pour Diouf), was launched to mobilise support for the PS through the local elections and beyond.

—and PS leaders stress their continuity with Mr Senghor

Coming amid an electoral campaign, the celebrations on October 9 of the 90th birthday of Senegal's first president, Léopold Sédar Senghor, inevitably took on a partisan cast. At numerous public ceremonies around the country, Mr Diouf, Mr Dieng and other party leaders repeatedly stressed that they were simply following in Mr Senghor's footsteps and that the PS represented continuity with the founding principles of the independence era.

The opposition parties are divided on forming electoral alliances

Given the sheer number of positions up for election, and the CFAfr1,000 (\$2) cost of filing registration papers for each candidacy, there has been some pressure on parties hoping to field a serious challenge to the PS to establish common electoral platforms. The PDS and the PIT, which had already formed an electoral bloc in Saint-Louis, announced in October that they would join forces

across the country to fight the elections, and urged other parties to join them. In Diourbel local party leaders forged a five-party coalition of the PDS, PIT, LD-MPT, AJ/PADS, and the Convention des démocrates et des patriotes/Garab gi (CDP/Garab gi), but the latter three parties later withdrew. The AJ/PADS, which has the strongest credentials as a genuine opposition party, having rejected all offers to join the government, decided to go it alone nationally, although it opened its candidate lists to selected independents. The CDP/Garab gi, at a national congress in Thiès in late September, repudiated the decision of its Diourbel section; the party leader, Iba Der Thiam, affirmed that they would not ally with any "false opposition" that participates in the government.

A former general enters the political arena in Casamance

In one of the big surprises in the election campaign, a retired general, Joseph Tavarez Da Souza, declared his candidacy for mayor of Ziguinchor, his home town, as a candidate of the Parti démocratique sénégalais-Rénovation (PDS-R), an offshoot of the PDS which has one minister in the government but which supported Mr Diouf's candidacy in the last presidential election. Mr Da Souza, a former chief-of-staff of the armed forces, is the highest-ranking officer to have entered the political arena. His candidacy in Ziguinchor is all the more significant given the longrunning insurgency of the separatist Mouvement des forces démocratiques de Casamance (MFDC), which has maintained a ceasefire since early in the year. Seeking to appeal to regionalist sentiments provoked by the dominance of bureaucrats and politicians from the north, the general has vowed to counter the "marginalisation of Casamançais cadres", while rejecting the MFDC's calls for independence and urging the people of Casamance to use the new regional government structures to press their claims.

A women's mobilisation leads to the arrest of an abusive husband

In a rare instance of public attention to the often-ignored issue of wife-beating, a campaign waged by a dozen women's associations and non-governmental organisations led to the arrest in Diourbel at the beginning of August of Colonel Ousmane Sall. Mr Sall's wife, Fatou Dieng, had filed for divorce, alleging that she had suffered 22 years of beatings and torture. According to a medical certificate issued by the National Trauma Centre in Dakar, her body was covered with scars and she was in danger of losing the use of an eye and an ear. Following the arrest, the women's groups held a march in Dakar on August 13 to denounce violence against women and to demand the strengthening and stricter enforcement of laws against abuse. They also decided to set up a complaint centre in Dakar where women can give testimony and seek advice.

Expulsions of Senegalese from Angola and France stir outrage

The plight of "unwanted" Senegalese abroad received considerable coverage in the national media and provoked protests by political parties when, in late August, the governments of Angola and France, within just a few days of each other, began a new round of deportations. While the foreign minister, Moustapha Niassé, expressed outrage at the sudden deportations of Senegalese and other non-nationals from Angola, Mr Wade, as the president's special envoy, travelled to Luanda to urge the Angolan government to treat the deportations there on a case-by-case basis, since not all the individuals concerned were in Angola illegally or were engaged in diamond- or drug-trafficking, one of the justifications for the expulsions. Meanwhile, the French police assault on the church of St Bernard in Paris, which was being occupied by Senegalese and

other Africans to publicise their opposition to the expulsion of undocumented immigrants from France, was described as scandalous by a number of opposition parties. The AJ/PADS expressed regret that the Senegalese government had "made more noise" about the expulsions from Angola than the predicament of those fighting deportation from France.

The French defence minister pledges to retain a large force in Senegal

In a visit to Dakar on August 19, the French defence minister, Charles Millon, conveyed assurances from the French president, Jacques Chirac, that any reduction in the size of France's contingents in Africa would be "well below" those in France itself. Specifically, he pledged that the force of 1,453 French troops in Senegal, the third largest French contingent in Africa, would not be "substantially" reduced, and that military aid and training programmes would be retained.

## The economy

The draft budget for 1997 projects higher tax receipts

In the draft budget submitted to the Assemblée nationale (parliament) in early October real GDP is forecast to grow by 5% in 1997, with annual inflation at 2%, both slightly better than the EIU forecasts. Fiscal receipts are projected to rise significantly next year. Income taxes will grow by nearly 17%, from an estimated CFAfr77.6bn (\$152m) in 1996 to CFAfr90.5bn in 1997, while taxes on international trade will rise by 8%, from CFAfr174.7bn to CFAfr189bn. Partly as a result, capital expenditure financed from the government's own revenue is expected to increase from CFAfr39.6bn to CFAfr50bn. Externally financed capital expenditure will rise more modestly, from CFAfr223.7bn to CFAfr230.4bn. The overall budget deficit is expected to decline by 4%, from CFAfr54.9bn to CFAfr52.6bn, in line with the objectives outlined in the Enhanced Structural Adjustment Facility (ESAF) agreed with the IMF, which expires in mid-1997.

Merchants strike against new tax regulations

As part of its efforts to increase domestic revenue by broadening the tax base, the government adopted legislation at the end of 1995 which extended value-added tax (VAT) to a wider range of commercial and industrial activities. This came after a two-year grace period following VAT's original introduction, in which many enterprises, especially in the informal sector, were temporarily exempted to give them time to prepare. However, as the tax's general implementation date approached, the Union nationale des commerçants et industriels du Sénégal (UNACOIS) issued a national strike call for August 19 to protest against the measure. The UNACOIS president, Moustapha Diop, claimed that the application of VAT would compel merchants to increase consumer prices by 20% and that those in the informal sector, many of whom are illiterate, would have difficulty calculating the tax. The union also protested about a planned surcharge on imported rice (stipulated in Senegal's agricultural adjustment programme) and the near-monopoly of sugar imports held by the Compagnie Sucrière Sénégalaise, owned by a French businessman, Jean-Claude Mimran. Other merchants' organisations dissociated themselves from UNACOIS's "dead cities" call, some of them noting that the VAT extension applied mainly to importers and to enterprises with more than CFAfr150m in annual turnover. The government itself took a hard line, rejecting any compromise, with the

deputy minister of the budget, Mamadou Lamine Loum, accusing UNACOIS of favouring “urban guerrilla warfare”. Despite the harsh words and an impressive mobilisation of security forces, the strike call was widely followed in most major cities, including Dakar.

- SONATEL employees ask for free shares
- In late September employees of the Société nationale des télécommunications (SONATEL) appealed to the government to subsidise their acquisition of shares in the enterprise, which is soon to be privatised. The coordinating body representing SONATEL’s three trade unions, which has been insisting that the government stick to previous informal agreements allotting 15% of the shares to SONATEL employees, in addition requested that the government give half of that proportion of shares outright to the employees in view of the many sacrifices they had accepted over the past ten years. The employees have already set up a limited company to raise CFAfr2bn to purchase the other half of the 15%.
- The World Bank and the government map out a water strategy—
- The World Bank and the Ministry of Water, following four days of intensive discussion in June, elaborated a new strategy for managing Senegal’s water resources, setting up a Conseil supérieur de l’eau (CSE) chaired by the president, Mr Diouf, to guide its implementation. This initiative comes amid concern over Senegal’s growing shortage of potable water. In 1995 supply averaged just 205,000 cu metres per day, 35% less than the national demand of 316,000 cu metres. The shortfall is expected to rise to 38% this year and 41% in 1997. The new multisectoral strategy involves a variety of components: construction of the Cayor Canal to improve Dakar’s water supply; revitalising dried-up river valleys; building saline barriers in the lower and middle Casamance; recycling water in the coastal regions; better mobilisation of counterpart funds for donor-financed water projects; and turning over responsibility for rural water-pump and borehole maintenance to local communities and farmers’ organisations. In rural areas the facilities of the privatised water utility are already being handed over to new water management committees, with the government agreeing to write off the debt arrears of some farmers’ groups in exchange for their assumption of future maintenance costs.
- while Taiwan comes in with major funding
- Just three months after the president led a delegation to Taiwan, the Taiwan ambassador signed an aid agreement in Dakar on September 9 pledging a grant of CFAfr15bn to help finance a vast rural water project. This covers half the cost of the project, which aims to revitalise more than 3,000 km of old water courses, including raising the water levels in the Ferlo and Sine valleys, where the rivers have virtually dried up. Related aspects of the project will seek to strengthen food security, promote more intensive livestock rearing, and develop inland fishing.
- BOAD credit seeks to stimulate artisan development
- Since July a credit facility of CFAfr4.4bn has been in operation specifically for rural artisans. Of the total, CFAfr3.6bn was lent at concessional rates by the Banque ouest-africaine de développement (BOAD), the financing arm of the Union économique et monétaire ouest-africaine (UEMOA). The Senegalese government provided CFAfr507m in counterpart funds, while another CFAfr311m was mobilised from the artisanal sector itself. Up to now, rural artisans generally had had to borrow at interest rates of around 16%. But the

new facility, managed through the government's Fonds de promotion économique, will offer loans at just 10% to local artisanal credit unions.

A mission to Canada stirs some interest among investors

Senegal's fish exports, mineral deposits and tourism prospects were the main features of interest for investment and trade opportunities among Canadian businessmen who met a high-level Senegalese delegation in Montreal in early September. More than 80 had signed up in advance for meetings with their Senegalese counterparts and with five Senegalese ministers; another 200 showed up for two workshops devoted to outlining investment opportunities in Senegal. A couple of days earlier the economy and finance minister, Pape Ousmane Sakho, signed an aid agreement in Ottawa with the Canadian International Development Agency, providing up to C\$1.3m (CFAfr500m) to the national oil company, Petrosen, for oil and gas prospecting.

Teachers unions object to volunteers

During contract negotiations in August between the government and the primary and secondary school teachers' unions, the union representatives, amid other economic concerns, objected to the Ministry of Education's decision to field 1,200 volunteer teachers. At a time of general job insecurity, the teachers fear that the volunteers might undermine their own positions. The government, which acceded to some of the unions' other demands, refused to compromise on this one, insisting there was no other way, in the short term, to reverse the decline in Senegal's school attendance rates. Between 1988 and 1993 the primary-school enrolment ratio declined from 58% to 54%, but by 1995 it had been pushed back up to 57%, still well below the Africa-wide average of 70%. According to the minister of basic education, Mamadou Ndoye, 500 new salaried teachers are recruited each year, but these are not enough either to replace those who leave or to keep up with a growing school-age population. Mr Ndoye added that the 1,200 volunteers, recruited among recent graduates and given three months training, will make it possible to teach 60,000 more students this school year than would otherwise have been the case. The government plans to recruit a comparable number of volunteers in each year of the proposed four-year programme.

## Agriculture and fishing

Favourable rains promise a good start to the next crop year—

Despite some initial worries provoked by low rainfall in early August, subsequent widespread and above-normal rains across much of the country promise reasonable harvests during at least the early part of the 1996/97 cereal marketing year (November to October). If the weather holds, then this will be the second successive year of relatively favourable agricultural output, following the 1.1m tons of cereals produced in 1995/96; the UN Food and Agriculture Organisation's "normal" production estimate is 910,000 tons annually. However, even such above-normal production still falls significantly short of national food demand, requiring annual food imports of 600,000-700,000 tons.

Senegal: cereal output  
('000 tons)

	1993	1994	1995
Maize	138.3	108.2	106.5
Millet & sorghum	752.6	670.9	794.1
Paddy rice	193.4	175.2	159.9

Source: Le Secrétariat du comité monétaire de la Zone franc, La Zone franc, *Rapport 1995*.

—but rice farmers complain of “unfair” competition from imports

Rice comprises the biggest share of grain imports, at around 400,000 tons in 1995/96, or more than twice national production levels. Local farmers have difficulty competing with imported rice (from India, Pakistan and Uruguay), especially in the irrigated zones of the Senegal River Valley where production costs are high. According to the director-general of the parastatal, Société d'aménagement et d'exploitation des terres du Delta (SAED), Sidy Moctar Keita, this competition is regarded by farmers as unfair; he has urged the government and international financial institutions to permit some measure of protection to domestic producers. Despite such difficulties, SAED's withdrawal from all direct production and credit activities, leaving greater room for the development of the private sector, has encouraged an expansion of irrigated rice areas in the valley. Currently, the Caisse nationale de crédit agricole du Sénégal (CNCAS) provides finance for the preparation of an average 4,500 ha per year, while SAED itself cultivates another 1,000 ha.

Cotton farming is to get a boost from an Indian firm

During a visit to Senegal in late July, the head of an Indian textiles firm, Arvind Mills, met the prime minister and announced that his enterprise would join with a local company, Agrina Sénégal, to develop irrigated cotton production in the Ferlo valley in northern Senegal. At a cost of CFAfr10bn (\$20m), the project will initially irrigate 5,000 ha, eventually expanding to 15,000 ha. Additionally, the waste from local cotton ginning will be processed into cattle feed for the large local market.

Differences emerge in talks on new EU fishing accord

Negotiations on a new fishing agreement for EU vessels in Senegalese waters (3rd quarter 1996, page 15) have hit problems over the levels of EU compensation and other issues. Although the talks began in July, they had not resolved the problems by the time the 1994-96 accord expired in October. The minister of fishing, Alassane Dialy Ndiaye, hoped that the talks would resume in November. About 60% of Senegal's industrial-scale fishing is carried out by foreign vessels operating under licence, and under the previous accord the EU paid Ecu15.8m (CFAfr10bn) in compensation for such fishing rights. Mr Ndiaye noted that the EU negotiators had offered to raise the level of compensation to Ecu10m annually, but the Senegalese government still considers this too low, both in relation to what other countries receive under similar accords and in the light of Senegal's plans to develop the fishing sector. These include raising the proportion of the EU payments allocated to the development of artisanal fishing (just 5% under the previous accord), as well as infrastructure investments, more research and training, and expanded surveillance of the country's waters to safeguard its fish stocks more fully. Also, out of concern at the danger of overfishing, Mr Ndiaye stated that Senegal wishes to reduce the number of foreign vessels authorised to fish in Senegalese waters. Negotiators on both sides, he noted, were considering the possibility that the

new accord would be for a longer duration, covering a period of perhaps three, or even four, years.

## Industry and mining

ICS-CSPT merger creates an integrated fertiliser giant—

Senegal's third largest industrial company, Industries chimiques du Sénégal (ICS), merged with the Compagnie Sénégalaise des phosphates de Taïba (CSPT) on September 25 to create a new entity, also called ICS, which vertically integrates the fertiliser production process, from raw material extraction to export. This improves ICS's position against its international competitors, many of which are already integrated, allowing greater flexibility in both production and sales. ICS, which is expected to export CFAfr70bn (\$137m) of phosphoric acid and fertiliser this year, will now also sell the unprocessed phosphate rock, pledging to meet all of the CSPT's prior commitments. Before the merger, the government had stakes of 23% in ICS (which was worth CFAfr116bn) and 50% in CSPT (valued at CFAfr26bn). Proposals for such a merger were first floated in 1989, but French and US shareholders objected; they were bought out in December 1995, leaving the government and Indian interests as the main partners and clearing the way for merger. Although some streamlining is expected at management level, no workers are expected to be laid off.

—with plans for significant new investments—

With the merger, ICS has announced plans to invest CFAfr150bn to double its phosphoric acid and fertiliser production capacity. Another CFAfr50bn will be invested in developing a new phosphate mine in Tobène, which, like Taïba, is in the Thiès region. Export prospects are considered promising, given the export boom stimulated by the devaluation of the CFA franc in 1994 and the fact that the USA has become a net importer.

—but the railway workers are upset—

The ICS-CSPT merger provoked a strike by railway workers on the same day, to protest at ICS's plans to turn over to its own railway firm the transport of phosphate rock from the Taïba mine, allowing the CSPT's contract with the state operator, Société nationale des chemins de fer du Sénégal (SNCS), to expire this year. This shift will reduce the SNCS's annual income by CFAfr2bn, or 20%. "We are not against the merger", explained the vice-president of the railway union coordinating committee, Oumar Bâ, "but leave us the transport." The unions halted work for the day in the railway yards of Dakar and Bel-Air, on the line running to the ICS's Petit-Mbao fertiliser depot.

—and environmentalists protest over a toxic gas leak

A month earlier, in mid-August, some 50 people living near the ICS's Petit-Mbao facility were injured by exhaust fumes carrying phosphoric acid and ammonia. The company agreed to pay all medical costs, but sought to play down the seriousness of the leak. Neither the press nor environmental groups were convinced. The Parti africain écologiste-Sénégal (PAE/S) strongly criticised the incident, urging the government to improve monitoring of environmental and safety regulations.

A study finds some high costs of doing business

The Chambre de commerce, d'industrie et d'agriculture de Dakar, supported by other Senegalese business associations, has published a study by two Senegalese

economists comparing the operating costs and fiscal and regulatory environments confronting businesses in the seven member countries of the Union économique et monétaire ouest-africaine (UEMOA)—Benin, Burkina Faso, Côte d'Ivoire, Mali, Niger, Senegal and Togo. It found that electricity charges in Senegal were the highest in the UEMOA, some 43% above the average, and that a litre of petrol costs CFAfr415 (\$0.81) in Dakar, also the highest in the union, compared with just CFAfr170 (\$0.33) in Cotonou (Benin), the lowest price. Customs duties were also high, at a uniform rate of 10%, compared to a majority of countries that impose just 5%. On the other hand, the cost of butane gas (usually used for household cooking) is among the lowest in the UEMOA, while telecommunications rates and air and road transport costs are average or below-average.

## Energy and transport

Financing is secured to bolster the electricity supply

The Caisse française de développement (CFD, the French state development bank), announced in late June that it has agreed to a concessional loan of CFAfr3.5bn (\$6.8m) to the state-owned electricity generator, Société nationale sénégalaise d'électricité (SENELEC), to renovate its dilapidated Bel Air diesel-fuelled power station. Additionally, SENELEC revealed in September that equipment was being moved into place for construction of a new, 20-mw station in Cap des Biches, secured by CFAfr12bn in financing from the Saudi Development Fund. SENELEC is currently negotiating with prospective investors on proposals for the construction of a privately owned 50-mw station, but no viable agreement is yet in sight.

An airport project faces high-level opposition

The construction of a second international airport at Keur Massar, 30 km east of Dakar, which had previously been announced by the minister of state at the presidency, Abdoulaye Wade, and officials of the US firm Strategic Partners (3rd quarter 1996, page 15), is now seriously in doubt. In a hard-hitting campaign speech in September, the Parti socialiste (PS) secretary-general, Ousmane Tanor Dieng, singled out the airport as one example of Mr Wade's "unrealistic white elephants". While not opposing the project in principle, Mr Dieng argued that not enough studies had been conducted either to demonstrate the need for a second airport or to explore the possibilities of extending the existing Dakar-Yoff airport (which on October 9 was renamed the Léopold Sédar Senghor International Airport).

## Foreign trade and payments

Exports outpace imports

Provisional balance-of-payments figures, produced by the latest *Rapport Zone Franc*, indicate an improvement in the current-account balance in 1994, following the 50% devaluation of the CFA franc in January of that year.

The export sector, particularly groundnuts, responded well to the devaluation of the CFA franc and the good rainfall, increasing in dollar terms by around 12% in 1994 and 22% in 1995. The dollar value of imports contracted by 6% in 1994, as a result of the rise in prices and the government's austerity measures combined with an increase in agricultural production, which lowered Senegal's

food import requirements. Imports rebounded in 1995, with real growth of around 18%, in line with the growth in the economy and increase in development expenditure. As a result, the dollar value of the trade-account deficit improved substantially in 1994, by 39%, before worsening by around 10% in 1995. The trend in the net services account mirrored the trade account over the period, reflecting freight charges and trade-related services.

Senegal: balance of payments  
(CFAfr m)

	1993	1994 <sup>a</sup>	1995 <sup>a</sup>
Exports	200.2	440.7	483.4
Imports	-307.7	-570.0	-611.1
Trade balance	-107.5	-129.3	-127.7
Services (net)	-61.5	-86.4	-82.0
Transfers (net)	89.9	213.4	183.2
Current-account balance	-79.1	-2.3	-26.5
Capital-account balance	46.4	177.4	70.4
Net errors & omissions	3.5	2.5	0.0
Overall balance	-29.2	177.6	43.9

<sup>a</sup> Provisional.

Source: Le Secrétariat du comité monétaire de la Zone franc, *La Zone franc, Rapport 1995*.

The modest current-account deficits in 1994 and 1995 are attributable to the higher inflows of grants, in support of the country's adjustment efforts, which largely offset the deficits on the trade and service accounts. Over the period, Senegal has been able to rebuild its foreign exchange reserves through the inflow of capital funds associated with the IMF Enhanced Structural Adjustment Facility (ESAF). Meanwhile, its external debt-servicing obligations were substantially reduced through rescheduling and forgiveness following the devaluation (2nd quarter 1996, pages 14-15).

# The Gambia

## Political structure

Official name	The Republic of The Gambia	
Form of state	Unitary republic	
Legal system	Based on English common law and the 1996 constitution	
National legislature	House of Assembly: 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	
National elections	April 1992 (legislative) and September 1996 (presidential); a return to civilian rule is planned after the legislative polls scheduled for January 2, 1997	
Head of state	Lieutenant-Colonel Yahyah Jammeh, who led the military coup in July 1994	
National government	Military/civilian, nominated by the post-coup Armed Forces Provisional Ruling Council (AFPRC) in August 1994; due to be replaced after January 1997 elections	
Main political parties	Political activity was banned in July 1994; the ban was lifted in August 1996, but three pre-coup parties (the People's Progressive Party, the Gambia People's Party and the National Convention Party) remain proscribed. The main political group is Colonel Jammeh's party, the Alliance for Patriotism, Reorientation and Construction (APRC)	
The government	President	Colonel 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	Isatou Njie Saidy
	Interior	Captain Lamin Bajo
	Justice & attorney-general	Hawa Sisay Sabally
	Local government & lands	Captain Yankuba Touray
	Public works, communications & information	Ebrihima Ceesay
	Trade, industry & employment	Dominic Mendy
	Youth & sports	Aminatta Fall-Sonko
Central Bank governor	Clarke Bajo	

## Economic structure

### Latest available figures

Economic indicators	1991	1992	1993	1994	1995
GDP at market prices <sup>a</sup> D m	3,484	3,105	3,549	3,357 <sup>b</sup>	3,707 <sup>b</sup>
Real GDP growth <sup>a</sup> %	5.4	1.4	1.5	n/a	3.2 <sup>c</sup>
Consumer price inflation %	8.6	9.5	6.5	1.7	7.0
Population <sup>d</sup> '000	947	986	1,026	1,068	1,100
Exports fob <sup>a</sup> \$ m	147.0	157.0	125.0	123.0	n/a
Imports cif <sup>a</sup> \$ m	177.8	214.5	181.6	162.5	n/a
Current account <sup>a</sup> \$ m	37.2	-5.3	8.2	-8.2	n/a
Reserves excl gold \$ m	67.6	94.0	102.2 <sup>e</sup>	98.0	106.2
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 <sup>f</sup> '000 tons	84.2	54.9	76.7	70.0	190.0
Charter tourists <sup>a</sup> '000	65.8	63.9	90.0	30.0 <sup>b</sup>	68.0 <sup>b</sup>
Exchange rate (av) D:\$	8.80	8.89	9.13	9.58	9.55

November 15, 1996 D9.87:\$1

Origins of gross domestic product 1993 <sup>a</sup>	% of total	Components of gross domestic product 1993 <sup>a</sup>	% of total
Agriculture	23	Private consumption	74
Industry	12	Government consumption	18
Services	65	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 1992 <sup>a</sup>	\$ m	Principal imports 1992 <sup>a</sup>	\$ m
Fish & fish preparations	2.7	Food	77.5
Groundnuts (shelled)	1.5	Machinery & transport equipment	61.7
		Manufactures	52.7
		Minerals & fuel	15.7

Main destinations of exports 1995 <sup>g</sup>	% of total	Main origins of imports 1995 <sup>g</sup>	% of total
Japan	29.2	China	20.3
Senegal	10.8	Côte d'Ivoire	13.9
Hong Kong	9.2	Hong Kong	9.8
France	7.7	UK	7.6

<sup>a</sup> Fiscal years starting July 1. <sup>b</sup> EIU estimate. <sup>c</sup> Official estimate. <sup>d</sup> Based on 1993 census. <sup>e</sup> End-September. <sup>f</sup> Crop years starting in calendar years. <sup>g</sup> Derived from partners' trade returns, subject to a wide margin of error.

## Outlook for 1997-98

The new president can look forward to a honeymoon period—

Whatever may be said against him, there is no getting away from the fact that 56% of the electorate freely voted for Colonel Yahyah Jammeh as president on September 26. International observers testified that it was a free and fair poll. Despite tribal loyalties, the hostility of those Gambians who dislike the military and the disapproval of many in the international community, Colonel Jammeh has unquestionably secured a strong following since he and his fellow officers in The Gambia's tiny army seized power in July 1994. The fact that more schools and medical units have been provided in his two years in office than in his predecessor's three decades of power will have endeared him to many, as will the decisive, no-nonsense way in which his regime has tackled corruption. Three-quarters of the voters are under 35—his own generation. The loyalty of this very sizeable section of the population will give him a favourable start in his new incarnation as a civilian leader.

—but only tentative international approval—

Despite the peaceful polling and widespread turnout, both the Commonwealth and the EU, influential partners whose opinion a small, poor state can hardly afford to disregard, have expressed misgivings. The fact remains that the three main political parties and an entire generation of political leaders were barred from participating. The Gambia now needs the kind of structural economic reform which only the Bretton Woods organisations and the international donor community can provide. As well as an early return to international political respectability, the country also needs to have a period of stability and calm in order to entice European tourists back to its beaches.

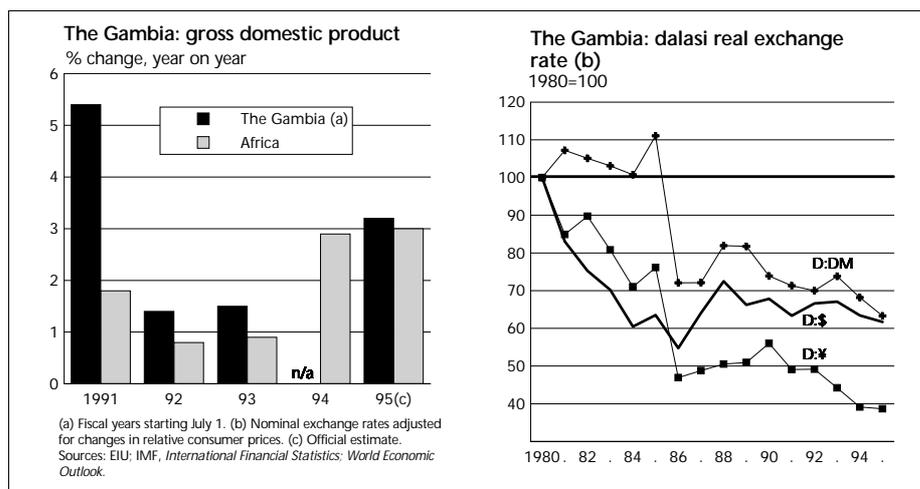
—while the delayed legislative elections will be closely watched

Whatever questionable methods Colonel Jammeh may be accused of using to secure the presidency, the next round of elections, to the suspended 50-member House of Assembly, will be a different matter. The election commission announced in early October the deferral of polling, from the original date of December 11, to January 2, 1997, with campaigning permitted in the period December 9-31. Commonwealth and other international observers will be on hand to scrutinise procedures, and Colonel Jammeh will face continued pressure to lift his ban on the three major parties. If he fails to do so and packs the legislature with members of his own party and the handful of minority parties presently tolerated, he will not look much like the kind of democrat the donors want him to be. The United Democratic Party (UDP) of his defeated rival for the presidency, Ousainou Darbo, has said that his party will boycott the legislative elections, following intimidation and procedural bias in the presidential ballot. The colonel faces another dilemma. He must decide how to reward the group of officers that constituted his military government for 26 months, who will expect cabinet posts. These officers may not be electable, but Colonel Jammeh is aware that, in the longer term, he cannot afford to lose the military's support.

Modest growth is projected

The EIU foresees a slow but sure return to normality in the tourism industry, with the number of charter tourists in the 1996/97 season climbing by up to one-third to 80,000-90,000. Coupled with slightly improved employment figures associated with government development projects and a favourable agricultural season, real GDP growth of 3-3.3% would appear realistic in 1996/97

(July-June) compared with the official estimate of 3.2% in 1995. An early resumption of multilateral aid would provide a considerable boost.



## Review

### The political scene

After many delays, a date was set for the presidential election—

Voting for a civilian president, an event which much of the international donor community, most vocally the Commonwealth, had originally insisted should take place before July 1995, was finally scheduled, in mid-August, to take place on September 26. Donors, led by the UK, the USA and the EU, outraged by Lieutenant Yahyah Jammeh's seizure of power from the long-standing democratic regime of Sir Dawda Jawara in July 1994, had given his military regime 12 months to return the country to democracy. Without their aid, these donors believed, the Gambian economy would soon collapse and Lieutenant Jammeh's Armed Forces Provisional Ruling Council (AFPRC) would have to stand down. This did not happen. Instead, in the two years since, Lieutenant, subsequently Captain, Jammeh, now aged 31 and styling himself Colonel, has achieved an unexpected level of popularity among Gambians. He has instituted a number of radical reforms, done battle with corrupt officialdom, kept the economy afloat in the face of international pressure, and delayed organising a presidential election until he was almost sure of winning (3rd quarter 1996, pages 22-24).

—as Colonel Jammeh changes the rules in his favour—

On August 17, with the three main opposition parties having been banned by decree three days earlier, the colonel announced that political activity by other parties might now resume, and that he himself intended to stand for the presidency. At the same time, the AFPRC published a decree banning the former president and all prominent former ministers from all political activity for periods ranging from five to 20 years. The measures neutralised virtually the entire political class. It was also announced that campaigning would take place in the period September 9-24.

—displeasing the  
Commonwealth

The Commonwealth secretary-general, Chief Emeka Anyaoku, expressed concern over the banning of opposition politicians and their parties. The Commonwealth, he said, would have to reconsider its position if Gambians were denied “their right to elect a government of their choice”. The Zimbabwean foreign affairs minister, Stan Mundenga, who is chairman of the eight-member Commonwealth Ministerial Action Group (CMAG) which has been monitoring the Gambian situation since Colonel Jammeh’s coup, said that the electoral changes were “likely to lead to the consolidation of military rule in another form”.

He was by no means alone  
in the race

Some foresaw that the election would be no more than a plebiscite, but there was to be more to it. By August 18 the indefatigable Dr Lamine Bojang, a medical practitioner whose enthusiasm for electioneering remained undiminished by his failure to win more than 6% of the vote when he challenged Sir Dawda in 1992, had announced that he would stand as the candidate of the tiny ultra-left People’s Democratic Party (PDS). Another small party not included in the AFPRC’s ban, the People’s Democratic Organisation for Independence and Socialism (PDOIS), announced that it too would field a candidate, later named as Sidia Jatta, who had also been seen off by Sir Dawda in the 1992 election. Parties began registering their candidates on August 19. The stipulations were that those selected must be aged between 30 and 65, have obtained 5,000 signatures from Gambian citizens of voting age prepared to support them, be educated to at least secondary level, and have paid a deposit of D5,500 (\$557), reimbursable to candidates who managed to obtain a quarter of the votes of the country’s 447,062 registered electors.

Two more candidates then came forward to challenge Colonel Jammeh. Another minority grouping, the National Reconciliation Party (NRP), put forward a hotel manager, Hamath Bah. However, the only serious opponent to Colonel Jammeh was Ousainou Darbo, a 48-year-old lawyer and leader of the United Democratic Party (UDP) who was believed to have significant support from within the armed forces, and the backing of influential members of the three banned mainstream parties. An ethnic Mandingo, Mr Darbo was expected to be able to count on the votes of a sizeable proportion of the largest ethnic group, accounting for some 40% of the electorate. Against him was his party’s association, in the public mind, with the *ancien régime* tainted with corruption. Colonel Jammeh is from a minority group; in his case the Jola (or Diola), numerous across the border in Senegal’s rebellious Casamance province but accounting in The Gambia for only about 5% of the population.

Colonel Jammeh creates  
his own party

On August 27 Colonel Jammeh announced the formation of his own political party, the Alliance for Patriotism, Reorientation and Construction (APRC), and appealed to voters to give him the chance to continue with the development projects he had already started. On September 5 the government confirmed his rank of colonel and announced his resignation from the army, in compliance with the electoral code, which forbids members of the armed forces standing for political office. At the end of the month the chairman of the AFPRC-appointed Provisional Independent Electoral Commission (PIEC), Gabriel Roberts, appealed to the president to free all political prisoners. The government refused to do so, although it waited two weeks before saying so.

- One challenger has second thoughts—
- Five days into the election campaign, Dr Bojang announced that he would not be running after all. He was not able to raise the 5,000 signatures required, he explained. By September 3, four political parties had registered: the APRC, the NRP, the PDOIS and the UDP.
- while another enjoys an embarrassment of support
- On September 2 Mr Darbo failed to arrive to address an inaugural party rally at Brikama, 40 km from Banjul, because the road was blocked, and his car surrounded by an estimated 100,000 enthusiastic supporters, said to be the largest crowd ever seen at a political rally in The Gambia. The sudden surge in Mr Darbo's popularity seemed to show that supporters of the banned big three parties had indeed rallied to him.
- Campaigning opens, with an exchange of accusations—
- Colonel Jammeh set off on an 11-day tour of the country on September 9, officially the first day of campaigning, having said beforehand that he did not intend to campaign. The opposition accused him of electioneering under the guise of a presidential tour. Launching his campaign, Mr Darbo accused the military regime of corruption and, *inter alia*, of covering up the mysterious death of the then finance minister, Ousman Koro Ceesay, in June 1995 (3rd quarter 1995, pages 19-20). Both the UDP and the NRP focused their campaigns on allegations that the AFPRC had squandered "colossal sums" on worthless projects. In return, Colonel Jammeh's party accused the UDP of accepting support from abroad and from backers of the old regime who wanted to perpetuate "theft of the people's property".
- and allegations of strong-arm tactics—
- On September 19, amid what had so far seemed a relatively quiet campaign and with the two leading contenders said to be running neck-and-neck, the UDP claimed that 12 of its supporters had been arrested. The party's senior administrative secretary, Sidi Sagnia, said that party members had been harassed by the security forces. He accused the army of distributing campaign leaflets on Colonel Jammeh's behalf. The government had earlier accused UDP supporters of setting up road blocks and of assaulting Jammeh supporters. On the same day the UDP campaign manager, Femi Peters, said in interviews with Reuter and the British Broadcasting Corporation (BBC) that the party feared for its leader's safety. He claimed that the army had set out from Banjul with a heavy escort to arrest Mr Darbo. On September 22 Colonel Jammeh's motorcade was reported to have been pelted with stones by a hostile crowd outside the capital. Mr Darbo later alleged that the army had turned on UDP supporters, 36 of whom had been taken to hospital. He later claimed that three people had died in the incidents. On September 24 a police spokesman acknowledged that seven UDP activists had been arrested following the incidents, but no mention was made of deaths. The seven were later charged with aggravated assault. Citizens, apprehensive about the outcome of election day, besieged shops in Banjul to stock up.
- as well as complaints about the colonel's domination of TV air-time
- The chairman of PIEC, Gabriel Robert, admitted at a press conference on September 22 that the commission had failed to bring about an even allocation of television time for the candidates. Despite appeals to the military authorities, he said, up to September 21, Colonel Jammeh had occupied 88% of broadcast

time allocated to the campaigning parties, leaving Mr Darbo with 3%, Mr Jatta 6% and Mr Bah 1%.

On the day, there is a record turnout—

By September 24, the end of the official campaigning period, pundits were forecasting a narrow victory for Colonel Jammeh. Four out of five Gambians turned out to vote on the day (which was declared a public holiday), men and women forming separate, orderly queues outside the 582 polling stations from 5am onwards, two hours before the booths were due to open. Troops and police were on hand, but they maintained a low-key presence, and no incidents were reported. The polling was monitored by the UN Development Programme (UNDP), and observers concluded it to have been generally free and fair, despite the obvious advantages held by the head of government.

—giving victory to the colonel—

In a fit of vainglory, the colonel had predicted that God would give him 99% of the vote. When PIEC declared the results at the end of September 27, he had not done as well as that, but had nevertheless secured a clear win, with 55.76% of the vote, well ahead of Mr Darbo, his only serious rival, with 35.34%. Mr Bah had 5.52% and Mr Jatta 2.87%. All in all, 394,494 people voted, out of a total electorate of 446,541—an 88.35% turnout. Colonel Jammeh received 220,011 votes, and Mr Darbo 141,387.

—and sending Mr Darbo scurrying for sanctuary

As the polls closed at 9pm on September 26, Mr Darbo sought refuge in the Senegalese embassy, together with his two wives, three children, two party supporters and Colonel Jammeh's former external affairs minister, Bolong Sonko, who was removed from office in late 1994. The nine remained at the ambassador's residence until the end of the month.

The new president acts fast, dissolving the AFPRC—

On September 28, in the first of several announcements in the following days, the colonel said that he had dissolved the military council through which he had ruled since seizing power in July 1994. "The AFPRC stands dissolved, the existing transitional cabinet having taken over all its functions and responsibilities," he said in a statement on radio and television. Those who had seized power with him had showed that they were "soldiers with a difference", he declared.

—calling for national unity—

In a television interview the same day, the president urged fellow Gambians to forget their past political differences and come together and build the country. He said that he had no idea why Mr Darbo had gone into hiding, adding that "perhaps he has a bad conscience". He accused the electoral commission of mismanagement, and said that it must do better at the legislative elections, now scheduled for January 2, 1997.

—and offering the opposition a role in government

In a speech on September 29, reported by Radio France internationale (RFI), the colonel invited opposition leaders to participate in government. He was not specific, but observers took the offer as an olive branch to Mr Darbo, who was at this time still in hiding. At the same time, the new president outlined his government's intention to boost the economy—a sector on which his regime has not hitherto generally had much to say—through, in particular, development of

agriculture, the country's primary resource. The president's aim, RFI said, was to make The Gambia self-sufficient in rice.

Mr Darbo emerges from hiding to challenge the result—

In an interview with Agence France-press (AFP) on the same day, the UDP's Sidi Sagnia said that Mr Darbo had received threats during the election campaign and wanted an assurance of safety. In a statement the same day, the party said that it was studying the election results closely, believing that they did not "seem to reflect the aspirations of the majority of the Gambian electorate". The defeated Mr Darbo left the Senegalese envoy's residence on September 30, calling on the PIEC to organise new elections.

—which the EU and the Commonwealth also see as dubious—

The Commonwealth group voiced "serious doubts" about the election's credibility in a statement on September 29. The ministers were concerned also by persistent reports that Colonel Jammeh's political opponents were in fear of their lives. The EU's Irish presidency put out a statement on October 15 saying that the EU was glad that the polling passed off peacefully, congratulating the PIEC on its role, but adding: "It regrets, however, that the recommendations drawn up by the PIEC were ignored and that conditions which would have ensured free and fair elections were not met." While it welcomed the lifting of the ban on political activity, the EU was, the statement said, "deeply concerned that the three major parties and all who have served as ministers over the past 30 years have been excluded from contesting the elections". Gambian newspapers printed the EU statement.

—but the new president is sworn in anyway

A crowd estimated at 20,000, together with dignitaries from neighbouring countries and foreign diplomats, attended Colonel Jammeh's swearing-in ceremony in Banjul on October 18. The president of Guinea-Bissau, Joao Bernardo Vieira, was present, along with senior officials from Niger, Nigeria, Mauritania, Libya, Senegal and Taiwan. In his speech, the colonel called on The Gambia's "old and new" development partners to continue their support. Great things had been achieved during the past two years, he said, and as regards government, transparency and accountability were now "indelibly instilled in the minds of the Gambian people". He also expressed support for a US plan to create a rapid deployment peacekeeping force for Africa.

## The economy

A sound economy, the new president insists—

The AFPRC was generally taciturn on the economy during its two years, but Colonel Jammeh appears to want to be more open, emphasising his new message of accountability in his inaugural address. He said that he would upgrade the office of the auditor-general, which would become an autonomous body with powers to examine public accounts "frequently and thoroughly" and so prevent any recurrence of the "astonishing" corruption and misappropriation of public funds seen under the old regime. He said that the economy had been "sound" under the AFPRC's management.

—as he lists the AFPRC's achievements—

In his speech, the colonel claimed that over the preceding two years his government had "serviced our debts as agreed, paid public servants on time, even increasing salaries, kept our currency strong, and paid for our imports". There

had been no shortages of essential commodities, he insisted. The government would continue to monitor stocks of rice and other foodstuffs so as to pre-empt "scarcities and profiteering". He declared that his government had "done a lot" in the fields of agriculture, education, health, communications, information and broadcasting. "Our achievements during the past two years are there for all to see," he said. He listed "the new schools, hospital, power house, airport terminal, roads, markets, radio and television services" and "the great, historically important monumental Arch 22 in Banjul" (3rd quarter 1996, page 22). According to press reports, 16 new schools and a hospital have been opened since the AFPRC came to power, while work on upgrading Banjul port and Yundum airport, commenced during Sir Dawda's tenure, has progressed.

—but there is some uncertainty about the sources of funds

In a highly positive review of the economy's performance in fiscal year 1995/96, the finance minister, Bala Garba Jahumpa, claimed that real GDP grew by 3.2%, but gave no figure for the reported decline of the previous year. Other reports, citing official figures, have shown a decline of 7% in 1994/95.

Mr Jahumpa attributed the general improvement in the country's finances to tight control by the AFPRC. Its policies have included the confiscation of assets from allegedly corrupt dignitaries of the old regime. Most observers find the government's accounting questionable and all official statistics should be treated with caution. Tourism, which normally accounts for 10-12% of GDP, remained seriously depressed in 1994/95, declining by 60% after the coup, only reviving by about 30% in 1995/96. Re-export trade, the other main source of foreign exchange in normal times, has also suffered badly as a result of Senegal's border restrictions. In addition, the cuts in non-humanitarian aid by the multilateral institutions and Western governments, after July 1994, cost The Gambia an estimated \$100m in 1994/95 alone.

## Foreign trade and payments

Despite sanctions, the external accounts are balanced—

Despite The Gambia's heavy reliance on external aid and a reduction in funds from the traditional Western donors following the coup, data produced by the IMF, in its *International Financial Statistics*, indicate that the overall balance of payments has remained positive in recent years, though only just. While there has been a contraction in both imports and exports since 1993, the trade gap has narrowed, particularly in fiscal 1994/95, but in that year the improvement in the merchandise balance was offset by outflows on services. Although transfers rose in that year, this was not enough to keep the current account in the modest surplus recorded in 1994. Aid contributions from the likes of Taiwan, Libya, Cuba, Egypt, Nigeria and Iran are thought to have gone some way towards filling the aid gap left by the absent Western donors. Taiwan is reported to have provided some \$80m of aid in the past two years. However, largely unidentified capital inflows easily covered any deficit on the current account. Nevertheless, direct investment in The Gambia declined from around \$15m in 1989 to \$8m in 1995.

The Gambia: balance of payments  
(\$ m)

	1993 <sup>a</sup>	1994 <sup>a</sup>	1995 <sup>a</sup>
Exports	157.0	125.0	123.0
Imports	-214.5	-181.6	-162.5
Trade balance	-57.4	-56.7	-39.6
Services (net)	5.0	23.4	-15.5
Transfers (net)	47.1	41.5	46.9
Current-account balance	-5.3	8.2	-8.2
Capital-account balance	39.4	33.1	70.4
Net errors & omissions	-22.7	-35.1	-15.6
Overall balance	11.4	6.2	1.0

<sup>a</sup> Financial year ending June 30.

Source: IMF, *International Financial Statistics*.

—and the reserve position  
improves

Confirming an article by the editor of the *Gambia Daily* newspaper, Momodou Musa Secka, in a fortnightly French magazine, *West Africa*, the IMF reported an improvement in external reserves, which stood at \$114m at the end of April 1996, compared with \$102m at the end of April 1995. This is equivalent to eight months of import cover, compared with the official target of five months.

Taiwan provides  
roadbuilding funds

Under an agreement signed in Banjul on September 8, Taiwan is to make a grant of \$7.2m for a project to build an 80 km road from Kerewan in north-west Gambia, including a bridge across the Gambia river, to Essau. The contractor will be Compagnie Sahelienne d'Entreprise (CSE) of Senegal, which has been involved in several other development projects since Colonel Jammeh came to power.

# Mauritania

## Political structure

Official name	République Islamique de Mauritanie	
Form of state	Arab and African Islamic republic	
Legal system	Strongly influenced by the <i>sharia</i> (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	
National elections	January 1992 (presidential) and October 1996 (legislative); next elections due in January 1998 (presidential) and October 2001 (legislative)	
Head of state	President, elected for a renewable six-year term	
National government	The president and his appointed Council of Ministers; last major reshuffle October 1996	
Main political parties	21 political parties are registered, the foremost of which are: Parti républicain démocratique et social (PRDS—ruling party); Action pour le changement (AC); Rassemblement pour la démocratie et l'unité (RDU); Union des forces démocratiques (UFD)	
	President	Maaouya Ould Sid'Ahmed Taya
	Prime minister	Cheikh El Avia Ould Mohamed Khouna
Key ministers	Civil service, labour, youth & sports	Kaba Ould Alewa
	Culture & Islamic affairs	Khattry Ould Jiddou
	Defence	Mohamed Ould Amar
	Education	Baba Ould Sidi
	Finance	Camara Aly Gueladio
	Fisheries & the maritime economy	Abdallahi Ould Neme
	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	Ahmed Kelly Ould Cheikh Sidya
	Rural development & the environment	Beijel Ould Houmeid
	Supplies & transport	Mohamed Deina Sow
	Trade, crafts & tourism	Mohamed Mahmoud Ould Dahmane
	Water & energy	Mohamed Yeslem Ould Vil
Central Bank governor	Mohamed Ould Michel	

## Economic structure

### Latest available figures

Economic indicators	1991	1992	1993	1994	1995
GDP at market prices UM bn	83.1	93.2	101.5	112.9	125.4 <sup>a</sup>
Real GDP growth %	2.6	1.6	5.5	4.2	4.6 <sup>b</sup>
Consumer price inflation %	5.6	10.1	9.3	4.1 <sup>b</sup>	6.5 <sup>b</sup>
Population m	2.04	2.11	2.16	2.21	2.27
Exports fob \$ m	436	407	403	400	510 <sup>b</sup>
Imports fob \$ m	399	461	400	352	378 <sup>b</sup>
Current account \$ m	-30	-118	-174	-70	3 <sup>b</sup>
Reserves excl gold \$ m	67.6	61.2	44.6	39.7	85.5
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 <sup>c</sup>
Fish exports '000 tons	301.0	289.0	318.6	196.1	300.0 <sup>c</sup>
Exchange rate (av) UM:\$	81.9	87.0	120.8	123.6	129.8

November 15, 1996 UM139.4:\$1

Origins of gross domestic product 1994	% of total	Components of gross domestic product 1994	% of total
Agriculture & fishing	24.9	Private consumption	82.6
Mining	12.3	Public consumption	10.2
Manufacturing	3.9	Gross fixed investment	16.1
Services	41.5	Exports of goods & services	42.1
GDP at factor cost incl others	100.0	Imports of goods & services	-50.9
		GDP at market prices	100.0

Principal exports 1995	\$ m	Principal imports 1994	\$ m
Iron ore	203.0	SNIM	103.9
Fish & fish products	132.3	Food	101.1
Gold	14.4	Fuel	33.5
		Transport equipment & machinery	30.9
		Consumer goods	12.7

Main destinations of exports 1995 <sup>d</sup>	% of total	Main origins of imports 1995 <sup>d</sup>	% of total
Japan	27.2	France	23.9
Italy	18.3	Spain	8.0
France	12.4	USA	7.4
Spain	11.0	Belgium-Luxembourg	5.7

<sup>a</sup> EIU estimate. <sup>b</sup> IMF estimate. <sup>c</sup> Official estimate. <sup>d</sup> Derived from partners' trade returns, subject to a wide margin of error.

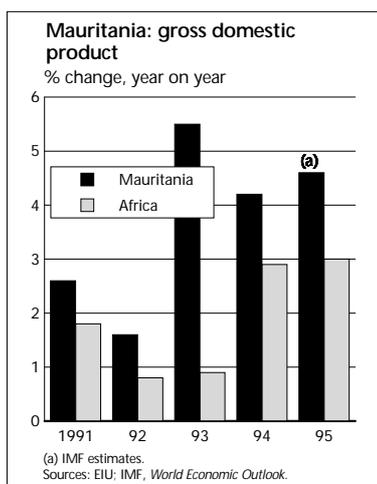
## Outlook for 1997-98

The PRDS sweeps the board

The president, Maaouya Ould Sid'Ahmed Taya, is assured of absolute legislative support for his government's policies for the foreseeable future. His Parti républicain démocratique et social (PRDS) secured a crushing majority in legislative elections staged in October. Of 79 seats contested, the PRDS won 70, pro-presidential candidates took a further eight, leaving just one to console the opposition. This was secured by the newly created Action pour le changement (AC), a party formed by and representing the interests of the *haratine* (descendants of freed slaves) and of negro-Mauritanians. The opposition was quick to claim massive electoral fraud but, while there were undeniable irregularities, the main reasons for the opposition defeat was its inability to present a common front or to counter the inertia of the party-state system that has developed around the PRDS.

While most press coverage of the election centred on the activities and complaints of the opposition, the result clearly shows this attention to have been disproportionate to the real balance of forces in Mauritania. The PRDS is not a political party in the traditional sense, rather it is a loose gathering of individuals and interest groups seeking to participate and benefit from the distribution of national resources. Although dominated by members of the *beydane* community (white Moors), the party has attracted significant backing from local politicians in southern parts of the country (representing negro-Mauritanians) who have cut their ties to opposition parties which, while claiming to represent their interests, have demonstrated a total incapacity to bring material improvements or exert real influence. Indeed, the ruling party faced its most serious challenges in regions where dissident *beydane* ran as independent candidates against PRDS nominees.

Nevertheless, the elections indicate a small shift in the balance of power in Mauritania. Although it confirms the erosion of support for the mainstream opposition, the Union des forces démocratiques (UFD, led by Ahmed Ould Daddah) and the Union pour le démocratie et le progrès (UPD, headed by Hamdi Ould Moukness), it marked the rise in influence of a new party championing the rights of black Africans and *haratine*. The AC has attracted support from the two most dispossessed communities in the country, and, while it still has only a small voice in the Assemblée nationale (parliament)—totally muted with the appointment of the sole opposition deputy as secretary of the assembly—it will form the most effective lobby claiming to speak for the minorities.



Economic growth is set to reach 4.7% in 1996

The success of Mauritania's economic policies has again been lauded by the international financial community. Half-year results indicate that the country will achieve a modest budget surplus in 1996, the first since independence, and the rate of economic growth is projected to accelerate marginally from 4.6% in 1995 to 4.7% in 1996. Although the economy remains small and vulnerable to external influences (trade results depend on the state of global iron ore and fish prices and the overall balance of payments is constrained by the size of the international debt), the government's IMF-guided reform efforts are slowly but steadily reshaping the economy. Financial reforms have encouraged renewed confidence in a banking system that was on the brink of collapse just a few

years ago, and proposals to overhaul commercial law are expected to encourage renewed investment in productive activity in the short term. Now that the legislative elections are over, with Mr Ould Taya virtually assured of a victory in the 1998 presidential election (should he confirm his intention to stand), the prospect of continued political stability will underpin Mauritania's international standing.

## Review

### The political scene

The PRDS wins a crushing legislative majority

The election of deputies to the 79-seat Assemblée nationale (parliament) took place on October 11, when 242 candidates, representing 13 recognised political parties, were joined by 50 independents in a bid to secure the support of Mauritania's 1,021,828 registered voters. Second ballots were staged one week later in 11 of the 53 constituencies, where no candidate won an absolute majority at the first round (the larger constituencies return more than one deputy). Not surprisingly, the ruling Parti républicain démocratique et social (PRDS) won a landslide victory, carrying 61 seats at the first round of the ballot (20 of which went unopposed), and securing a further nine places in the run-off election on October 18. Independent candidates (all of whom would have run under the PRDS banner if selected) gained seven seats and the small Rassemblement pour la démocratie et l'unité (RDU—also allied to the PRDS) one seat. The only success by the genuine opposition was in the Nouakchott constituency of Sebkha, where the candidate of the Action pour le changement (AC) narrowly beat the PRDS representative at the second ballot.

Mauritania: results of legislative elections  
(no of seats)

Party	1992	1996		Total
	Mar	Oct 11	Oct 18	
PRDS	67	61	9	70
Independents	10	1	6	7
RDU	1	1	0	1
PMR	1	0	0	0
AC	0	0	1	1
Total	79	63	16	79

Source: National sources.

Low-key campaigns fail to enthuse voters

Although the electoral campaigns began in an atmosphere reminiscent of the 1992 exercise, with street parades and all-night parties in tents sponsored by the various political groups, enthusiasm quickly waned as the government clamped down on unauthorised open-air meetings. Few issues were debated by the parties and their leaders. The PRDS concentrated on the achievements of Maaouya Ould Sid'Ahmed Taya's presidency while opposition politicians limited their rhetoric to condemning various scandals and frauds involving prominent people linked to the PRDS. Some fresh interest was generated in the final

weeks by a lifting of the ban on open meetings, but only the PRDS had prepared for the change.

Opposition disarray splits support—

The opposition parties entered the elections with only a remote chance of winning a majority, as they failed to back candidates in more than half the races. The largest contingent came from the Union des forces démocratiques (UFD) which put forward candidates in only 26 seats, and in every case they ran against other opposition groups and independents, as well as the PRDS flag-bearer. Indeed, in virtually every ward where the opposition stood a chance of victory, support was divided between several candidates. Voters in the nine wards of Nouakchott were faced with choosing from between four and 11 candidates. A survey of voter intentions conducted in the capital prior to the election by an independent magazine, *Mauritanie Nouvelles*, indicated that while the PRDS candidate was at the top of all the lists except one list, the combined “opposition” support outweighed that for “pro-majority” parties in three others.

Although several smaller opposition parties formed alliances with one or another of the three mainstream groups, all attempts to bring together the UFD, the Union pour la démocratie et le progrès (UDP) and the AC quickly failed. A UFD-AC arrangement was thought possible, following a meeting at the start of the campaign between the two party leaders, Ahmed Ould Daddah and Messaoud Ould Boulkheir, but this only resulted in a joint letter to the prime minister asking for a postponement of the elections. Speaking to the independent press, a party official explained that having broken from the UFD, the AC was not prepared to shelter under a UFD umbrella, and wanted to use the elections to measure the true state of national support for the movement. He claimed that the UFD was eager to reunite the opposition camp to demonstrate that successive splits in the party had not affected its mass appeal.

The AC was also courted by each of the two UDP factions that emerged from the party split following the ousting of certain senior officials in June (3rd quarter 1996, page 32). The larger group, led by Hamdi Ould Moukness (commonly referred to as UDP1), refused to talk to the AC but was prepared to listen to the rival UDP2 (led by Mohammed Ould Babah) and did agree to call on its activists to vote for non-PRDS candidates in the second round of the elections. A spokesman for UDP1 said that this decision was made as part of the party strategy to “ensure the effective unity of the opposition on the ground” and to “safeguard the democratic process”.

—contributing to voter apathy

Opposition support was further weakened by a low turnout on polling day. Barely one-third of those entitled to vote did so in the capital, where the plethora of lists, bickering among the opposition parties and the creeping certainty of a PRDS victory sapped enthusiasm. Elsewhere in the country the turnout was higher (with abstention averaging 49%), notably where voters were presented with a clear-cut choice and where parties were better able to mobilise supporters. Even fewer people bothered to vote in the run-off ballots, when the UFD withdrew its candidates from the two races where it remained in contention (thereby handing victory to the PRDS).

The PLEJ confirms its decision to boycott the ballot—

When the date for the election was announced, in late August, all 21 of Mauritania's political parties indicated their willingness to participate. As time passed many dropped out of the race, unable to fund a campaign, but only one group took a positive decision to boycott the exercise. In late September Bah Amadou Alhassane, the leader of the Parti pour la liberté, l'égalité et la justice (PLEJ), confirmed that his party would not participate, as a protest at the non-repatriation of Mauritanian refugees still living in camps in northern Senegal. He said he could not support a democracy which "excludes 100,000 Mauritians and where there is open state racism". PLEJ is the only political party in the country led by a member of the *riverine* community (3rd quarter 1996, page 31).

—and is joined by UFD at the second round

Mr Ould Daddah pulled his party out of the second round of the legislative elections after the interior ministry confirmed the PRDS landslide, alleging underhand tactics by the ruling party: "There was massive fraud...an industry of falsification." The UFD, once the main opposition party despite its boycott of the 1992 elections, failed to take four seats in southern strongholds and the capital where opinion polls had suggested an easy victory, and decided not to contest the run-off in two other seats where it performed well in Nouakchott. "We had no other option", said Ould Daddah, "in view of the tampering which prevented a large number of opposition supporters from voting." He claimed "veritable factories" had been set up to produce identity and voting cards. Other opposition parties rejected this stance. An AC spokesman said that his party would "prove our willingness to move the democratic process forward" by taking part in the second round at three constituencies where it remained in contention (Sebkha, Nouadhibou and Kayedi). All other second-round contests, following the UFD withdrawal, pitted independent candidates against the PRDS.

The opposition complains of censorship—

In early October the UDF complained that broadcasts on national radio and television by its candidates were being censored whenever they touched on "sensitive" issues, such as slavery or the repatriation of Mauritanian refugees. The party also considered it unfair that it had only three minutes of air-time, whereas the ruling PRDS benefited both from its allotted three minutes of party-political broadcast and extensive coverage in daily "news" programmes. The complaints followed those by the international body, Reporters sans frontières (RSF), which protested at the seizure and censorship, in late September, of the weekly Arab-language publication *Teïssir*, which ran an article on power-sharing that apparently breached the press law by implicitly questioning the nature of democracy in Mauritania. RSF appealed to the head of state to amend the press law so as to guarantee true freedom of the press, and to prevent "arbitrary suspensions" of publications on the sole authority of the interior ministry.

—and overt rigging of the ballot

Even before the first-round results were announced, the opposition was complaining of PRDS "manipulation" of the election. It denounced the distribution of voters' cards to non-entitled people, enabling their recipients to cast multiple votes at different polling stations. According to the leader of the larger faction of the UDP, Mr Ould Moukness, police confiscated 3,000 cards from one house in Atar and similar cases were reported in Nouakchott where, upon the intervention of a foreign observer, the authorities stopped distribution. The

leader of AC, Mr Ould Boulkheir, described the first round of the elections as a farce. He said that there had been full-scale mobilisation by the administration to “ensure and guarantee the supremacy of the ruling party”. He also complained that military officials had posted thousands of soldiers to certain constituencies to sway the vote in particular polling stations, and had required these troops to bring back opposition ballot papers to “prove there were government ballot papers in the envelope”.

The PRDS dismisses claims of fraud

The former prime minister and now general secretary of the PRDS, Sidi Mohamed Ould Boubacar, rejected all claims by opposition politicians that the elections were anything other than free and fair. He expressed regret at the absence of an opposition in the assembly, as not being good for democracy. Other PRDS spokesmen admitted that there were some problems with organising the elections, but denied any systematic attempt to influence the outcome. Efforts to prevent fraud included a ban on travel between various districts, the use of indelible inks to identify those who had voted (donated by Germany), and the suppression of supplementary voter lists (in response to opposition complaints that the names of late-comers supposedly favoured the ruling party). The posting of military contingents to various popular voting booths was purely a security measure, they said, and soldiers on duty at these stations could not be expected to go somewhere else to vote. A major complaint by most opposition groups centred on problems with elector’s cards which prevented many people from voting. Poll organisers and officials acknowledged the difficulty, due to mistyped names or identity card numbers.

The elections were witnessed by a small team of international observers, who agreed that there were “a number of imperfections”, but added that they were not so serious as to cast doubt on the overall conduct or outcome of the exercise. The head of a delegation from the Organisation of African Unity (OAU) described the election as “globally positive”.

The first woman deputy takes her seat

Other than the size of the PRDS victory, the result marked the election of Mauritania’s first woman deputy. Lalla Zeina Mint Sbaghou, who won 61% of the vote in the eastern constituency of Timbédra, was one of 26 female candidates seeking to enter parliament, most of whom were running as supplicants on PRDS tickets (supplicants assume the seat should the elected member take a government job, die, or otherwise fail to complete his term). The others generally failed to appeal to voters in one of the most conservative and male-dominated societies in West Africa.

A cabinet reshuffle follows the election victory

On the day following the announcement of the final election results, the prime minister, Cheikh El Avia Ould Mohamed Khouna, and the members of his administration formally tendered their resignation. After a short delay, Mr Ould Taya confirmed the prime minister in his post, but made a few changes in the membership of the 22-strong cabinet, comprising 17 ministers, four secretaries of state and the government general secretary. Of the outgoing cabinet, 11 ministers retained their rank. The major change was the removal of the former minister of defence, Abdallahi Ould Abdi, and his replacement by Mohamed Ould Amar, who moves from the Ministry of Planning. The ministerial newcomers are Mohamed Yeslem Ould Vil (water and energy), Ahmed Kelly Ould

Cheikh Sidya (planning), Mohamed Mahmoud Ould Dahmane (trade), Khattry Ould Jiddou (culture and Islamic affairs), and Kaba Ould Alewa (civil service). No official explanation for the changes has been given, but some former ministers excluded from the new government have been accused of giving only lukewarm support to official PRDS candidates in their constituencies. In its first post-election session, parliament re-elected Cheikh Sid'Ahmed Ould Baba as president (speaker) of the house and, as a gesture, the sole opposition deputy, Kébé Abdoulaye, was elected secretary of the assembly.

Mauritania expresses concern at the proposed Iraqi security zone

Mauritania was one of a handful of countries to oppose Turkey's proposals to set up a security zone in northern Iraq to prevent infiltration by the dissident Kurdish supporters of the separatist Kurdistan Workers' Party (PKK). The plan, according to Nouakchott, was in "flagrant contradiction" with the positions of countries in the region which were committed to supporting the "territorial integrity and unity of Iraq". The statement was most likely intended to mobilise support from the local Baath movement which, while officially "purged", retains considerable influence. Indeed, one of the movement's leaders, Yehdih Ould Breideleil, having experienced a few weeks in prison following the Baath "plot" of October 1995, is today the president of Air Mauritanie (4th quarter 1995, page 28).

Ties with Egypt strengthen

One outcome of a visit to Nouakchott by the Egyptian minister of foreign affairs, Amr Moussa, in late August, was the establishment of a joint cooperation commission. This plans to promote cultural exchanges as well as boost bilateral flows of trade, investment and technical cooperation.

## The economy

GDP growth should reach 4.7% in 1996—

The World Bank is pleased with Mauritania's economic progress in recent years. Strict observance of performance criteria and the adoption of reforms in accordance with a promised schedule have put the country firmly in the good books of the Bretton Woods institutions. GDP growth is forecast to reach 4.7% in 1996, the trade-weighted exchange rate has held reasonably steady since a 27% devaluation in 1992, inflation has been kept below 7% and the country is on track to record its first budget surplus since independence from France in 1960 (figures for the first six months of 1996 point to a year-end surplus of 1.2%). Foreign exchange reserves have been building up; they more than doubled to \$85m during 1995, and are set to rise to around \$169m by the end of 1996—representing around than five months of import cover. The World Bank describes the size of the domestic debt as "negligible", particularly since renegotiation of \$145m of outstanding loans to the fishing sector, but made no comment on the country's \$2.3bn foreign debt, most of which is owed to the Paris Club group of creditors.

—but success may exclude Mauritania from further debt relief

Mauritania has hopes of obtaining debt relief in accordance with the terms of an agreement reached by international bankers in September, at the annual World Bank/IMF meeting, whereby certain low-income countries may qualify for forgiveness of up to 80% of their outstanding debts. Unfortunately, Mauritania may not meet the established criteria (eligible countries must be designated

“least developed”, have followed an Enhanced Structural Adjustment Programme (ESAP) for at least four years and be incapable of meeting their debt repayments), and will argue that it is being penalised for its relative success in putting the economy on a sounder footing.

Commercial law is revised	Investment in profitable sectors such as fishing and agriculture will be further encouraged by the redrafting of commercial law. A World Bank-sponsored project to reform the legal framework began in August, designed to help Mauritania's government adopt and ensure transparency and equitable treatment for all. Commenting on accusations of fraud and nepotism from leading opposition figures, the World Bank representative admitted that there were some irregularities but these were “not extremely significant” and unlikely to deter serious investors.
Tariff changes are introduced	Changes to the tax and tariff regime, promised under the terms of an IMF Enhanced Structural Adjustment Facility (ESAF; 3rd quarter 1996, page 35), were finally introduced on October 1. The top rate of duty on imported goods was slashed to 35% (previously, luxury goods incurred tariffs of up to 148%), with further reductions scheduled to 30% in 1998 and 28% in 1999) as well as cuts in the number of categories. In addition, a range of exemptions and waivers accorded to privileged importers was removed. Mauritania did not jettison all protection of domestic industries, however, and is imposing differential value-added tax (VAT) and internal taxes on luxury and other items to ensure investment reaches key sectors. The changes will not have a significant impact on consumer prices as rates on most basic goods are unchanged.
BMCI makes steady progress	Recently published results from Mauritania's second largest commercial bank, Banque mauritanienne pour le commerce international (BMCI), indicate a modest increase in assets but a substantial rise in profitability in 1995. Assets of just over UM14bn (\$1.5bn) in 1995 (1.8% more than 1994) produced a profit of UM208m (UM20m in 1994). Credits rose by around 8% in the year, in spite of a restrictive credit allocation policy. Fishing and general trading absorbed more than half of the credits, with most of the remainder allocated to international letters of credit. BMCI opened one new branch at Kiffa in 1995.
A new savings bank is launched	The Canadian Caisse des Jardins has expressed interest in supporting a new savings bank in Mauritania, the Caisse Mauritanienne d'épargne. The Canadian institution had earlier undertaken a feasibility study of the scheme, with World Bank backing, and has said that if the project goes ahead it would be prepared to take a financial interest and supply technical assistance. The then governor of the Banque centrale de Mauritanie (the central bank), Mohamed Ould Michel, met the Canadians while on a trip to North America in October, shortly after he published guidelines for the operation of mortgage savings accounts. The new accounts are subject to special provisions and carry highly favourable rates of interest. Depositors will earn 5% on their accounts, and borrowers will pay 9% on loans granted. Mortgages will be advanced for periods of up to 20 years (depending on the duration the applicant has held a savings account), and will only be for the construction or purchase of the borrower's principal residence. Some observers have criticised the guidelines which, while specifying that only

one such account could be opened by an individual, are open to abuse given the extended family system and ongoing deficiencies with the civil registry. They fear there are inadequate safeguards to prevent loans intended to fund housing being diverted to business activities.

## Agriculture and fisheries

- A locust warning is issued Several sightings of locust larvae and hoppers (unfledged intermediate stage insects) are causing concern in the regions of Brakna and Trarza. Cattle owners around Nouakchott expressed worries that unless rapid precautions were introduced, the insects could develop and devour pastures that have benefited from reasonable rainfall this season. The *Desert Locust Bulletin* of the UN Food and Agriculture Organisation (FAO) confirmed these reports, noting that some adult swarms had been spotted further east in the regions of Néma and Aioun El Atrouss. Swarms are also likely to develop in central and southern areas, particularly where rainfall had been heaviest. Winds prevented spraying of identified swarms in some pastoral areas and, while the situation is not yet critical and insects spotted close to cereal crops have been treated, there is some concern that major infestations could yet occur.
- Industrial fishing is suspended for two months— Deep-water fishing off the coast of Mauritania was suspended throughout September and October, in accordance with provisions in the fisheries code requiring a biological rest period to encourage reconstitution of fish stocks. The fishing “holiday” follows a similar ban imposed for one month in 1995, and has contributed to renewed interest in artisanal fishing, which is not affected by the ban.
- boosting artisanal activity The prospect of regular enforced rest periods has encouraged several businessmen with interests in the deep-sea fleet to make sizeable investments in small boats. Near the major ports the artisanal fleet was at the brink of disappearance, due to competition from the larger vessels, before the biological rest period introduced in October 1995. The enforced rest period disrupted supplies to markets in the capital and Nouadhibou, but also forced exporters with long-term contracts to scour local markets for produce (creating a severe shortage within the country). As a result, the artisanal fleet multiplied by five or six, in some instances. However, this has not always benefited longstanding fishermen as there has been an influx of boats and crews from Senegal (most of whom had left the country following the border incidents in late 1988). This has raised a problem of policing the sector. Some of the “opportunistic” fishermen use equipment that fails to meet local requirements (for example, small-mesh nets), and others land their catches in northern Senegal rather than in Mauritania. At the same time, the Mauritanian authorities have increased the costs of fishing licences for registered artisans, who complain of being squeezed between the business-sponsored cartels and foreign “wildcatters” during the only period of the year in which they stand a good chance of making a reasonable profit. New legislation is expected shortly to redress this situation.
- Lawyers look over the EU fisheries pact Shortly after the introduction of a new fishing pact allowing EU vessels increased quotas in Mauritanian waters (3rd quarter 1996, page 36), some of the

small print in the agreement was called into question. Four Spanish-flagged ships were arrested by maritime surveillance authorities in August, for failing to comply with conditions regarding the carriage of Mauritanian scientific observers on EU boats. The problem was one of interpretation of two apparently contradictory clauses and, after a heated dispute and a series of legal opinions, the Mauritanian point of view was accepted.

Rural and fisheries  
development schemes win  
French support

The Caisse française de développement (CFD, the French state development bank) has granted FFr27.1m (\$2.8m) towards the second phase of an integrated rural development project centred on the Senegal river region. The programme, destined to promote environmental, agricultural and livestock rearing schemes, continues and builds on an earlier project also funded by the CFD. In a separate award, the CFD has granted FFr2.5m and advanced FFr12m under favourable repayment terms to support a project to improve the access to bank credits by artisanal fishermen. The scheme, also backed by the Crédit Mutuel Mauritanien, will create a fund to enable fishermen to purchase boats and essential equipment through the Union nationale de coopératives de crédit pour la pêche artisanale en Mauritanie (UNCOPAM).

## Energy, mining and transport

The OMVS sets up an  
electricity management  
body

Ministers from the three principal partners in the Senegal river development organisation, Organisation pour la mise en valeur du fleuve Sénégal (OMVS), met in Nouakchott in late August. The OMVS, which groups Mali, Mauritania, and Senegal, seeks to promote the development of the region around the river valley. The main achievements to date have been the construction of two dams. The dam at Diama, near the river mouth, is intended to prevent salt water encroachment upstream, and has permitted irrigation of some 400,000 ha of land as well as assisting with regulating tidal flows. The Manantali dam, built far upstream in Mali, is intended to provide hydroelectricity to the member states and to regulate water flows, reducing seasonal flooding. The OMVS ministers have now approved the decision to establish an independent company charged with the management and development of electricity supplied by Manantali, an initiative promoted by various development aid donors which are funding the installation of generators at the site.

Snim and Safa  
development schemes win  
EU funding

The European Investment Bank (EIB) has granted loans of Ecu2m (\$2.5m) and Ecu1.4m, largely for risk capital, for two iron ore-related projects. The loans are destined for the construction of new facilities at Nouadhibou; a mechanical workshop for the mining company, Snim, and a foundry for the steel company, Safa (Société Arabe de fer et acier).

The Trans-Maghreb  
highway moves closer to  
realisation

Mauritania's vocation of bridging the Maghreb and sub-Saharan Africa has advanced a step forward with the grant of a \$12.8m loan by the African Development Bank (ADB) towards upgrading the road between Akjout and Atar. The work will involve providing an asphalt surface to the route which, in parts, is navigated with difficulty by all but heavy-duty four-wheel-drive vehicles. The scheme is part of the \$26m "Route transmagnhrébine" project, destined to

open up the north-eastern part of the country and to improve transport between Mauritania and its north African neighbours.

## Education, environment and health

The World Bank supports education projects

The International Development Association (IDA, the soft-loan arm of the World Bank) has called for tenders for two educational projects it is sponsoring in Mauritania. A \$34.6m general education support project will boost the provision of all levels of education, with the construction of 20 new colleges, seven new basic education centres and new buildings for Nouakchott University, as well as the supply of infrastructure to the new facilities (notably water) and books, furniture, teaching aids and consultancy services. A \$12.9m vocational training and technical education project will supply similar services to the Ecole Nationale d'Enseignement Maritime et de Pêche, to improve the capacity of manpower in the fishing industry.

A cholera epidemic is fought with EU aid

In mid-October the European Commission, through the European Humanitarian Office, approved aid worth Ecu80,000 (\$101,846) towards eradicating cholera in the Mauritanian capital, Nouakchott. The assistance comes just weeks after an alarming increase in hospital admissions of patients suffering the symptoms of cholera (nursing staff estimated 1,300 cases in Nouakchott by early September). Hospitals have complained of a lack of diagnostic equipment and materials, and appealed for assistance with launching a sanitation campaign. Partly in response, the city authorities have privatised refuse collection and awarded contracts for the removal of rubbish heaps piling up throughout the capital, as well as for the regular collection of waste from households.

## Aid news

Among aid agreements announced recently include the following.

- The Arab Monetary Fund (AMF) has granted a loan of \$22m to assist the programme of economic and financial reforms as part of the ongoing Structural Adjustment Programme (SAP) agreed with the IMF.
- Saudi Arabia has given 200 tons of dates to "serve as a relief to Mauritanian people facing food shortages".
- The OPEC fund has granted aid of \$3.2m towards the overhaul and modernisation of the national printing press.
- Spain donated equipment worth Pta10m (\$78,762) to help the running of the legislative elections in Mauritania, bringing total aid from various EU states for the exercise to FFfr1.5m (\$294,389; all bilateral grants by individual European countries).
- Moscow city authorities have donated fire engines and equipment to boost the operational capacity of the fire service in the Mauritanian capital, Nouakchott.

## Quarterly indicators and trade data

### Senegal: quarterly indicators of economic activity

		1994				1995				1996	
		1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr
Prices: Dakar	Monthly av										
Consumer prices:	1990=100	117.7	124.9	135.3	138.3	134.0	135.6	143.0	144.3	139.5	140.2 <sup>a</sup>
change year on year	%	22.1	30.4	35.8	40.4	13.8	8.6	5.7	4.3	4.1	n/a
Money & banking	End-Qtr										
M1, seasonally adj:	CFAfr bn	224.4	256.8	284.2	298.8	300.1	280.6	318.6	312.2	n/a	n/a
change year on year	%	14.8	32.9	49.8	52.6	33.8	9.3	12.1	4.5	n/a	n/a
Discount rate	% per year	14.50	12.00	10.00	10.00	9.00	8.50	8.50	7.50	7.50	7.50
Foreign trade <sup>b</sup>	Qtrly totals										
Exports fob	CFAfr bn	47.22	51.05	45.51	44.94	69.97	82.47	75.75	65.87	76.82	60.00 <sup>c</sup>
Imports cif	"	78.54	100.96	97.91	111.07	172.58	174.80	142.97	200.22	191.25	128.87 <sup>c</sup>
Exchange holdings	End-Qtr										
Central Bank:											
gold <sup>d</sup>	\$ m	8.4	8.3	8.4	8.4	8.2	8.4	8.4	8.4	8.7	8.5
foreign exchange	"	9.3	2.8	45.2	176.9	244.2	275.5	277.4	266.2	304.4	176.8
Exchange rate											
Market rate	CFAfr:\$	571.0	547.2	528.2	534.6	484.9	485.3	491.5	490.0	503.2	515.3 <sup>e</sup>

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

<sup>a</sup> Average for April-May. <sup>b</sup> DOTS estimate. <sup>c</sup> Total for April-May. <sup>d</sup> End-quarter holdings at quarter's average of London daily price less 25%.

<sup>e</sup> End-August 1996, 507.4.

### The Gambia: quarterly indicators of economic activity

		1994				1995				1996	
		1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr
Prices	Monthly av										
Consumer prices:	1990=100	126.9	128.8	126.8	132.4	134.6	136.3	140.9	139.2	138.8	n/a
change year on year	%	3.7	-0.9	-0.6	4.9	6.1	5.8	11.1	5.1	3.1	n/a
Money	End-Qtr										
M1, seasonally adj:	D m	445.0	416.8	399.6	405.5	399.4	449.1	446.5	468.7	486.3	481.9 <sup>a</sup>
change year on year	%	5.5	-5.4	-11.6	-11.9	-10.3	7.8	11.7	15.6	21.8	n/a
Foreign trade	Qtrly totals										
Exports fob	D m	138.64	96.37	37.24	65.56	72.19	38.61	25.53	12.15 <sup>b</sup>	n/a	n/a
Imports cif	"	611.88	494.71	465.38	430.93	350.08	315.72	315.38	201.70 <sup>b</sup>	n/a	n/a
Exchange holdings	End-Qtr										
Monetary authorities:											
foreign exchange	\$ m	109.20	101.61	96.19	95.59	95.99	98.09	97.98	103.81	110.73	110.39 <sup>a</sup>
Exchange rate											
Market rate	D:\$	9.701	9.521	9.480	9.579	9.372	9.542	9.630	9.640	9.700	9.850 <sup>c</sup>

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

<sup>a</sup> End-April. <sup>b</sup> Total for October-November. <sup>c</sup> End-May.

## Mauritania: quarterly indicators of economic activity

		1994			1995				1996		
		2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr
Prices	Monthly av										
Consumer prices <sup>a</sup> :	1990=100	131.5	134.8 <sup>b</sup>	n/a	n/a						
change year on year	%	5.3	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Money	End-Qtr										
M1, seasonally adj:	UM m	20,309	17,512	20,535	19,440	19,519	19,839	18,442	18,409	18,097 <sup>c</sup>	n/a
change year on year	%	-0.4	-14.8	-5.4	-3.0	-3.9	13.3	-10.2	-5.3	n/a	n/a
Foreign trade <sup>d</sup>	Annual totals										
Exports fob	\$ m	(	462	)	(	591	)	(	n/a	)	
Imports cif	"	(	570	)	(	637	)	(	n/a	)	
Exchange holdings	End-Qtr										
Foreign exchange	\$ m	39.2	46.0	39.7	70.9	61.5	73.4	85.4	87.3	110.8	102.2 <sup>e</sup>
Exchange rate											
Market rate	UM:\$	123.55	124.12	128.37	125.28	130.16	134.05	137.11	136.21	139.80	138.09 <sup>e</sup>

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

<sup>a</sup> Mauritanian households. <sup>b</sup> July only. <sup>c</sup> End-April. <sup>d</sup> DOTS estimate. <sup>e</sup> End-August.

## Senegal: foreign trade

	\$ '000		
	Jan-Dec 1989	Jan-Dec 1990	Jan-Dec 1991
Imports			
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	66,659
Total incl others	1,533,973	1,620,419	1,096,951

	Jan-Dec 1989	Jan-Dec 1990	Jan-Dec 1991	Jan-Dec 1993
Exports fob <sup>a</sup>				
Fish & products	208,121	216,041	215,256	121,108
Oilseed cakes	39,112	35,366	17,451	11,647
Cotton, raw	10,718	9,533	20,248	27,210
Phosphates, mineral	63,875	56,962	43,926	4,145
Salt	6,330	7,820	7,625	7,470
Mineral fuels	84,515	96,768	104,390	87,434
Groundnut oil	102,828	129,980	69,534	33,722
Chemicals	97,452	116,680	95,110	102,538
Machinery & transport equipment	28,197	18,470	13,695	35,092
Total incl others	750,884	782,600	652,208	521,464

	\$ m					\$ m			
	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995 <sup>b</sup>		Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995 <sup>b</sup>
Exports fob					Imports cif				
France	191	138	77	173	France	391	352	257	508
Italy	36	36	19	74	USA	80	52	38	75
Mali	40	27	34	42	Thailand	46	41	33	64
Spain	16	8	7	30	Italy	70	42	28	57
India	96	67	28	22	UK	23	15	11	56
Germany	13	8	5	15	Netherlands	29	34	26	55
Portugal	4	2	2	14	Japan	44	36	34	41
Guinea	18	13	10	12	China	24	20	21	40
Netherlands	17	6	17	11	Hong Kong	6	8	6	35
Cameroon	27	18	11	11	Belgium-Luxembourg	37	27	28	33
Iran	23	12	8	9	Nigeria	78	62	20	23
Total incl others	741	530	340	577	Total incl others	1,258	996	704	1,344

<sup>a</sup> Export statistics are not available for 1992. <sup>b</sup> DOTS estimate.

### The Gambia: foreign trade

	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 <sup>a</sup>	Jan-Dec 1993 <sup>a</sup>	Jan-Dec 1994	Jan-Dec 1995 <sup>a</sup>		Jan-Dec 1992 <sup>a</sup>	Jan-Dec 1993 <sup>a</sup>	Jan-Dec 1994	Jan-Dec 1995 <sup>a</sup>
Exports fob					Imports cif				
Belgium-Luxembourg	119	59	n/a	n/a	China	57	77	11	64
Japan	33	35	n/a	19	Côte d'Ivoire	11	13	36	44
Senegal	2	1	6	7	Hong Kong	62	42	9	31
Hong Kong	5	4	n/a	6	UK	39	39	22	24
UK	5	8	8	5	Netherlands	18	22	13	21
France	1	1	3	5	Belgium-Luxembourg	22	24	13	16
Spain	5	2	2	4	France	24	30	25	15
Indonesia	n/a	n/a	3	3	Thailand	17	16	7	15
Total incl others	232	153	35	65	Total incl others	392	376	209	316

<sup>a</sup> DOTS estimate.

### Mauritania: foreign trade

	UM m			
	Jan-Dec 1991	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994
Imports fob				
Food	8,838	13,801	11,358	12,500
Other consumer goods	1,881	2,785	1,603	1,574
Fuels	2,972	3,735	4,212	4,142
Machinery & transport equipment	2,304	3,054	6,429	3,823

	Jan-Dec	Jan-Dec	Jan-Dec	Jan-Dec	Jan-Dec
	1991	1992	1993	1994	1995
Exports fob					
Fish & products	18,044	27,522	26,945	28,073	17,169
Iron ore	17,287	17,377	19,442	22,282	26,353
Gold	n/a	775	1,893	2,605	1,869

	\$ m					\$ m			
	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995		Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995
Exports fob <sup>a</sup>					Imports cif <sup>a</sup>				
Japan	138	107	129	161	France	166	149	137	152
Italy	58	75	69	108	Spain	48	48	30	51
France	46	63	63	73	Belgium-Luxembourg	29	27	30	36
Spain	49	46	53	65	China	16	5	35	35
Côte d'Ivoire	21	25	30	37	Netherlands	15	46	16	33
Belgium-Luxembourg	39	21	25	30	Germany	37	24	36	32
Total incl others	450	424	462	591	Total incl others	599	591	570	637

<sup>a</sup> DOTS estimate.

## Senegal and Mauritania: French trade

(\$ '000)

	Senegal				Mauritania			
	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995
Exports fob								
Food, drink & tobacco	78,799	83,766	63,857	63,944	42,590	45,255	29,759	38,371
of which:								
dairy products	35,429	37,177	21,861	13,998	9,334	4,262	3,470	2,358
cereals & preparations	19,512	25,611	27,130	26,921	19,744	21,068	15,682	22,147
sugar & products	4,678	5,913	1,201	4,954	9,811	15,775	4,064	9,995
Mineral fuels	4,871	12,181	16,434	24,758	9,369	17,291	6,090	7,580
Chemicals	83,732	79,154	63,796	70,853	16,172	16,694	15,547	16,025
Rubber manufactures	5,526	4,971	5,069	5,721	3,679	2,486	4,426	2,914
Paper & manufactures	9,847	8,980	7,038	12,508	1,405	1,178	1,033	1,193
Textile fibres, yarn								
& manufactures, incl clothing	9,658	9,021	6,382	7,373	2,467	2,162	2,262	1,762
Non-metallic								
mineral manufactures	7,038	6,808	6,615	8,119	1,876	1,482	1,415	1,271
Iron & steel	11,228	14,927	6,982	8,813	4,340	1,355	1,995	5,994
Metal manufactures	14,264	12,124	9,874	16,718	9,763	5,874	5,761	5,638
Machinery incl electric	113,857	100,224	86,770	117,832	36,810	33,041	37,944	35,185
Transport equipment	44,002	33,593	27,867	41,037	11,945	9,394	23,276	12,473
Scientific instruments etc	16,847	9,548	9,667	11,645	3,104	2,568	3,506	2,013
Total incl others	448,800	421,460	363,374	461,599	149,705	142,516	138,215	138,033
Imports cif								
Fish & products	106,620	97,476	94,836	108,657	1,477	4,221	4,841	7,236
Crude fertilisers & minerals	8,117	6,397	6,392	3,853	0	1	1	0
Metalliferous ores & scrap	853	477	538	1,738	50,069	65,979	66,069	71,961
Petroleum & products	0	0	0	0	0	1,570	0	0
Animal & vegetable oils & fats	32,060	29,969	47,380	46,136	0	0	0	0
Total incl others	178,584	161,822	183,113	194,095	52,196	72,873	72,673	80,723

## Mauritania: Japan's imports

(\$ '000)

	Jan-Dec 1992	Jan-Dec 1993	Jan-Dec 1994	Jan-Dec 1995	Jan-Jun 1995	Jan-Jun 1996
Imports cif						
Fish & products	146,023	113,569	138,414	176,323	75,035	84,207
Total incl others	151,100	117,550	140,861	178,749	76,949	88,124