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MAPS NIGER-PHASE II: PRIVATE SECTOR DESCRIPTION

FINAL REPORT

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EXECUTIVE SUMMARY

Introduction

The MAPS Private Sector Description team consisted of two consultants who visited Niger three times and spent a combined seven weeks between March and May, 1991. During the course of their visits, they 1) met with dozens of private sector, Government, donor, and NGO operators, 2) reviewed more than 100 documents germane to private sector development, 3) analyzed available statistics from the Government of Niger, BCEAO, World Bank, IMF and other sources, and 4) undertook a field trip to assess private sector and NGO activities in Maradi and Zinder to complement findings and observations in Niamey and Tillaberi. The following report is the result of their observations, findings and analyses as of May, 1991. This report will be used with subsequent survey and focus group findings in June, 1991 to assist USAID with its private sector strategy. It is hoped that this material will also stimulate dialogue and workable agreements among various public and private sector concerns to promote private sector growth and employment.

The Role of Government and Private Sector Development

The Nigerien economy operates from a narrow and fragile physical and human resource base. Far more so than for other countries characterized by more ample resources and skills, it is imperative that the Government of Niger improve the efficiency of national resource allocation across all sectors of the economy. This can only be done by allowing and encouraging the formal private sector to play a greater role in the nation's economic life.

Rather than expecting an immediate turnaround, the gradual formalization of private sector activity will take years, possibly decades. However, to induce such change, the Government will have to reconceptualize its role and scale of operations to appropriately fit its realizable revenue capabilities. This will require political decisiveness, integrity and conviction at all levels of Government.

While the GON has implemented significant policy reforms in recent years, reform is further needed in a number of areas. In particular, the regulatory environment can be simplified, investment and taxation procedures can be streamlined, and greater economic competition should be encouraged. By emphasizing the provision of services that facilitate private sector growth, the Government has a better long-term chance of developing institutions and expanding the tax base that is so essential to the maintenance and operations of governance in the first place. Continued

interventionism and control, on the other hand, will stifle formal private sector development, and delay the development of a viable and well distributed tax base. With increasing population growth rates and urbanization, future policy reforms and effective implementation will be the least that will be required to revive the formal economy and reduce Government dependence on external sources of funds.

The Private Sector in Niger

The private sector in Niger is overwhelmingly informal, traditional, risk averse, and cash poor in its orientation and mode of operations. Part of this reflects the severe physical environment in which this predominantly agro-pastoral and trading society has had to function. However, the informal orientation of the private sector also reflects dissatisfaction with the rules, regulations, taxation, resource misallocation and general inconvenience imposed by the modern state, all of which are distinctly different from the traditional business culture that has prevailed in Niger for centuries.

These characteristics of the modern state have not only deterred traditional private sector operators from becoming formal (e.g., registered, licensed, tax-paying), but have combined to virtually bankrupt the limited number of formal sector firms that do operate in Niger. The modern private sector faces virtual extinction, with contribution to GDP and employment falling throughout the 1980s and virtually inconsequential today. The parastatal sector has performed miserably in Niger, as elsewhere in Africa and around the world, due to lack of professional management, adherence to social (e.g., patrimony) instead of economic (e.g., profits) principles, and lack of accountability in financial management. As such, the formal sector is only a minor part of general economic activity in Niger, with the vast majority of people working in agriculture, livestock, petty trade and small crafts.

With the marginalization of the formal sector of the economy, the Government finds itself lacking an adequate tax base to generate the revenues needed to cover public expenditure. The result is dependence on donor assistance, increasing debt service obligations, inability to rationalize the Government payroll, and continued frustration in the private sector with growing levels of public sector corruption and political inertia. The spiral of mistrust and desperation ensures continued informal sector activity as the predominant form of economic behavior. The outstanding question is whether 1) the Government will be too weak to try to control the informal sector, leading to higher levels of production and distribution, or 2) reinforced Government efforts to expand the tax base and continued economic decline will lead to further increases in corruption and other payments, limiting cash available to small-scale operators for savings and investment that might

regenerate the economy over time. As long as this spiral of distrust continues, Niger's long-term economic prospects remain bleak.

Opportunities for Private Sector Growth

Whatever economic opportunities exist in the private sector, they will have to be developed over the long term for sustainable growth to become a possibility. This will require:

1) An entirely different approach on the part of the Government towards the private sector, from one of control and interventionism to one of promotion and cooperation;

2) A radical transformation in the country's approach to private investment, both local and foreign, to encourage long-term capital formation without increasing debt loads or reliance on Government budgets;

3) Institutional development to train people in methods of professional and resource management, with particular emphasis on production and operations, marketing and distribution, finance and accounting, and appropriate technology;

4) A substantial increase in the role of NGOs to serve as a link in the chain of management and development until a sufficient base of formal private sector operations can assume these roles in the marketplace;

5) Development and active involvement of private sector business associations that are not Government controlled, as is the Chamber of Commerce; and

6) A new approach to banking and finance, recognizing the formal banking sector is virtually insolvent and incapable of substantially increasing financial intermediation rates while the informal sector is costly in the allocation of credit.

As for products and markets, there will be little dramatic change in the status quo until the above changes are made. However, not all is negative. The private sector has proven itself resilient, adaptable and productive despite the harsh physical environment and antagonistic regulatory environment.

While drought has severely reduced agro-pastoral resources, primarily livestock herds, Niger's farmers continue to produce millet, cowpeas and onions in abundance and at levels far greater than their neighbors in the Sahel. The latter two often find their way to Nigeria and other coastal African countries despite the burden of costly transport and, in some cases (e.g., Nigeria, Ghana), weakened purchasing power relative to the CFA due to

devalued currencies. These developments suggest that other counterseasonal products can be grown for the local and international cash market.

Niger has a long history of exporting hides and skins to Nigeria and Europe, although this has diminished significantly in recent years for a number of reasons (e.g., drought-induced loss of livestock, reduced credit allocations, less efficient abattoirs, poor Government decision-making concerning privatization and control). To the extent there is a market, and assuming it adopts policies from earlier years which permitted market development and management autonomy, Niger has potential to fill some of the international demand that exists.

Official economic statistics show that artisanal manufacturing has grown throughout the 1980s because of 1) effective demand despite weak purchasing power, 2) low cost production, and 3) relatively benign Government treatment towards this sector to encourage its growth. This sector covers a range of consumer goods that are affordable. Critical to continued growth in this sector is that the Government continue with its benign approach. These lessons should also be applied to larger manufacturing enterprises to promote their growth. It should also be noted that while Niger's manufacturing capabilities are limited by tradition and education, NGO activities have found Nigerien artisans and service sector operators to learn their crafts well and quickly. A range of informal services has also increased their contribution to GDP and employment, reflecting adaptability and competitiveness as the formal sector shrinks.

The Government has stated its intention to stay involved in the uranium sector. This is fully understandable, although prices are likely to remain soft for the foreseeable future. To diversify away from dependence on uranium earnings, the Government should encourage as much private exploration as possible in the mining sector. Revision of the Investment Code, the <u>guichet unique</u>, and the Government's general approach to direct private investment (including foreign) could be well tested in this sector of the economy. In addition, the emergence of informal gold mining reflects an area of opportunity for the economy. As with the formal mining sector, the Government should seek to encourage and support this activity, not control it. The example of Ghana in the mining sector may be appropriate for Niger, as both Lonrho and small-scale operators have played a major role in increasing gold production in recent years, contributing substantially to employment, GDP, export earnings, tax revenues and dividends to both public and private sector shareholders.

The service sector provides a series of opportunities to Niger. Its longstanding tradition in commerce is an asset that should be promoted, not stifled. The degree to which there is increased competition will benefit the consumer. The current system of

payments at checkpoints along Niger's major routes is a tax on distribution that makes its goods more expensive and exports less competitive. The public is well aware that both commerce and transportation have private sector operators who seek to cartelize, monopolize and monopsonize, all to the detriment of the consumer. Nevertheless, the Government's response has been ineffective in reshaping the way in which commerce is conducted in Niger. A more detached approach with less cumbersome tax methods will likely more constructive.

Tourism is another area where there may be some potential. Niger's tourist infrastructure was established in response to the uranium boom. Today, that market has gone bust, and Niamey hotels operate at high vacancy rates. The tourist sector has been hurt by declining Nigerian travel to Niger. Algeria offers comparable attractions to Europeans at far cheaper rates. The vast majority of tourist revenues often remain in the country of booking, with little benefit to the host country except in low wage labor, artisanal production and food service preparation. Nevertheless, other countries have succeeded, and Niger has potential as well.

I. INTRODUCTION

A. PURPOSE AND OBJECTIVES OF THE PRIVATE SECTOR DESCRIPTION

The purpose of the MAPS-Phase II Private Sector Description is to discuss the internal dynamics of the Nigerien private sector and the role it plays in the broader national and international economy. Specific objectives include the following: 1) assess the impact of public policy on private sector performance, behavior and development; 2) quantify the private sector's importance in the Nigerien economy in terms of GDP contribution, employment, international trade, investment, taxes paid, and other important measures; 3) create a broad private sector map, and several sub-sectoral maps, detailing the role in and share of private sector activity in Niger; 4) review the role of parastatals in the economy; 5) identify leading and lagging economic sectors, and the private sector role in those trends; 6) generate benchmark data by which to measure change over time; and 7) provide useful information for USAID project and program design.

B. ORGANIZATION OF THE PRIVATE SECTOR DESCRIPTION

The Private Sector Description is organized to flow according to the above objectives. Chapter II reviews public policy and private sector performance (#1), while Chapter III serves as a private sector assessment (#2-6). It is hoped that throughout the course of this study, that useful information is provided not only to USAID-Niger (#7), but to its many partners in the Government, private sector and donor community of Niger.

C. RECOGNITION

The MAPS team would like to thank all the many individuals who assisted with the Private Sector Description report. While there are too many to list, we would specifically like to thank Mike Kerst, George Callan, Haroura Djibo and Sidi Mohammed Iddal at USAID; Maliki Barhoui at the Ministere de la Promotion Économique; and Patrick Augeraud and Abdelaziz Djibo at the Direction de la Statistique et de la Démographie. Without the assistance of these individuals and many others, we would not have been able to assemble this report.

II. POLICY AND INSTITUTIONAL BUSINESS ENVIRONMENT

The following section identifies key characteristics and trends in the current Nigerien policy and institutional environment. The purpose of this chapter is to highlight significant developments across a broad range of policy areas, and by doing so, present the context for the private sector analysis and appraisal that is the subject of Chapter III.

A. FISCAL POLICY

1. Tax rates: Current levels of taxation are arbitrary and vary from profession to profession. Moreover, taxes are highly regressive and pose a particularly onerous burden on smaller firms.

Tax rates vary greatly among vocations (e.g., photographers pay 17%, while blacksmiths pay 2.8%), and some professions (e.g., launderers) are not taxed at all (Nathan Associates, 1990). Because taxes are assessed by profession, rather than varying according to earnings, this creates a disincentive for smaller firms to operate in the formal sector.

2. Market taxes impose a heavy and regressive tax on small-scale and microenterprises and farmers.

Market taxes are flat fees determined by each arrondisement, and are widely viewed as a constraint because they are assessed whether or not goods are sold. The market tax is reassessed the following day on those unsold items which are again brought to market, having a negative compounding effect and serving as a disincentive to market activity. As documented in the GEMINI report, mat weavers in the Dosso, Madoua, and Tahoua départments pay a large proportion of their earnings in market taxes. For example, the cost of paying the market tax can absorb 25% of a mat weaver's gross revenues in Loga. This percentage would be greater if the seller is unable to sell an entire month's production in one day.

The tax is similarly regressive for small service providers (e.g., food preparers) who may sell only small quantities, because the same fixed rate is assessed on all market participants regardless of earnings. As currently constituted, market taxes create a significant disincentive for small and micro-entrepreneurs to participate in market activity, making markets less efficient. While market taxes support local government activities, the burden of payment falls disproportionately on the lowest-income artisans, traders and farmers.

3. The tax on industrial and commercial profits (BIC) is high and serves as a deterrent to formal sector participation.

The current 50% profits tax on industrial and commercial activity is high. Corporate tax rates of 45% in Ghana and Malawi have been identified as constraints to formal private sector growth, while the 15% flat tax assessed in Mauritius is considered one of the reasons for that island economy's prosperity.

4. Tax assessment: The means used to assess the patente are widely perceived to be arbitrary and confusing.

Payment of the patente is required of all merchants. Since a) procedures for assessing the patente are often not understood, and b) many traders do not keep business records, the amount of patente assessed is often arbitrary. This provides ample opportunity for corruption, penalizing the commercial sector without tax payments necessarily boosting Government revenues.

5. The informal sector does pay a variety of taxes, although these may not always enter the Government treasury. The distribution of those enterprises and individuals paying taxes is uneven.

Many large-scale, traditional traders are able to avoid almost all forms of formal taxation. Nonetheless, they assume a variety of social obligations which effectively constitute a form of income tax. The "El Hadji" play a prominent role in village social development by financing schools, mosques and dispensaries. These all represent social infrastructure investments which, in other cultural or economic settings, would be financed from Government revenues. While these allocations have the positive effect of strengthening the merchant's image and position in the community, they also represent cash allotments that might otherwise go into other investments and generate greater production and employment.

Smaller, informal firms with fixed business premises usually pay some form of patente and licensing fee. Many of these firms also possess a carte de commerce. As discussed below (#38), bribes exacted at police checkpoints also constitute users fees even though funds paid do not support the Government treasury.

6. Customs: Customs suffers from a lack of technical resources that compromises the processing of tax transactions and weakens its data collection capability.

Customs operations are limited by a number of resource constraints that impede the force's ability to act effectively, particularly in the area of data collection (Abdeliah, 1990). While Customs is implementing a computerized data collection system to improve the quality and timeliness of important statistics, this effort has

been hindered by lack of equipment, maintenance problems, and other deficiencies. Computerized tax collection operations in Niamey are exposed to extensive dust, threatening to cause significant damage to machines and materiel. The processing of tax collection and import duties is still conducted inefficiently, and staff need a) training in administrative, planning, and organizational techniques, as well as b) sufficient inventories of office supplies for normal operations. The system whereby Customs agents receive timely information about changes in regulations is also weak, as some recent liberalizations in the import/export code have reportedly not yet been observed by Customs agents.

B. MONETARY POLICY

7. Currency valuation: The strength of the CFA relative to the currencies of neighboring countries, especially Nigeria, must be recognized as a given constraint to the formal sector.

There is nothing the Nigerien authorities can do regarding the relative value of the CFA without completely altering Niger's current monetary policy. In this regard, Niger is completely dependent on external developments, both in the Nigerian economy as well as within the CFA zone as a whole. The adverse impact this has on Niger's formal sector balance of trade makes the introduction of improved incentives for investment and private sector growth all the more imperative. Otherwise, trade will continue through informal channels, further reducing the already limited tax base. While the official CFA value theoretically facilitates imports of goods for consumption and assembly, purchasing power in Niger has diminished to the point where the formal sector is unable to benefit from this advantage. Exhibit 1 shows the difference between the official and unofficial CFA-naira exchange rates from 1984-1988. Merchandise trade flows are discussed in Chapter III.

8. The devaluation of the naira is only one factor adversely affecting Niger's private enterprises competing with imported Nigerian goods.

Most cross-border trade takes place at the parallel exchange rate, which has historically reflected the market value of the naira relative to the CFA. While the naira's recent official devaluation brought the currency more into line with the parallel rates, much of the damage done to Niger's private small-scale enterprises results from other factors in Nigeria such as lower labor costs, subsidized power, economies of scale, and cheaper imported inputs. Where currency values appear to have had a direct impact is in the reduced Nigerian travel to Niger, hurting many of Niger's service sector operators as well as small-scale manufacturers.

9. Inflation: Despite a relatively strong currency, the BCEAO has kept tight control over money in circulation, and this has helped keep the inflation rate down.

Money in circulation was FCFA 130 billion in July, 1990 compared to an average FCFA 122 billion from 1985-1989. Throughout the 1980s, the average annual nominal growth rate of Niger's money supply was 6.1%, low by African standards and even in the more disciplined CFA zone. While money supply is not the only determinant of inflation rates, it is critical. According to the GDP deflator, Niger's inflation rate was 3.6% from 1980-1988, low by African standards. This also compares favorably with most Francophone African countries, but reflects depressed purchasing power. Exhibits 2-5 highlight key Nigerien monetary and inflation rate statistics

C. INVESTMENT AND TRADE POLICY

10. Perceptions of Government regulation: Government regulations are perceived as a significant constraint on small-scale enterprise activities.

As indicated in the GEMINI study, survey respondents stated that Government regulations were the second largest constraint at the time of enterprise start-up, following the availability of credit. During periods of enterprise growth, constraints posed by Government regulations were still perceived as significant, although less severe than during start-up. This finding appears to be consistent with conditions in other neighboring countries such as Senegal, indicating the regional need for Government reforms to promote enterprise development.

11. Formal enterprise establishment: Regulations governing the establishment of commercial and industrial enterprises have been simplified, although there are other areas in need of improvement.

Positive regulatory moves include:

a) Extending the duration of business licenses from 2 years to 5-10 years;

b) Decentralizing approval authority for some activities to the local préfet level; and

c) Eliminating the need to obtain prior agreement from the Ministry of Commerce for the establishment of companies by nationals.

In addition, business licenses are now automatically renewed at the end of the 5- or 10-year period unless a negative decision is made by the authorities within 45 days.

These reforms have eased difficulties in registering businesses. Nonetheless, these procedures could still be simplified further. First, in many developing countries, business licenses are issued in perpetuity. In such countries, once a business has received its initial license (and assuming it does not dramatically change its operations), it is not necessary to renew the license. In other countries, licenses are automatically renewed to assess annual taxes. Either of these measures would be an improvement.

Second, in Niger, businesses must obtain a large number of permits, some of which are only obtainable in Niamey. Even a small firm may reportedly require as many as 40 permits to obtain a license to operate, although this is likely to be most often enforced with larger and foreign firms. The time needed to acquire all necessary permits for a license commonly requires as much as one year. While such delays are common to many Francophone African countries which inherited complex systems of business administration and oversight, registration is typically simpler and faster in some Anglophone African countries. For example, less than one month is needed to register a business in the Gambia.

12. Investment promotion: Business establishment, investment and export/import procedures are still not clearly spelled out to potential entrepreneurs.

While a guichet unique has been created, this office is only designed to serve exporters. There is no centralized agency to direct or advise potential investors, either domestic or foreign, or exporters/importers, regarding the procedural requirements needed to establish a business or invest under the Investment Code. Moreover, there are no readily available, up-to-date guides or brochures detailing these procedures. By contrast, countries such as Burundi have published a "Guide des Investisseurs" which explains their Investment Code, investment procedures, fiscal regime, Labor Code, and Customs regime, and provides basic cost and infrastructure information. Without such guidance, entrepreneurs seeking to establish a business encounter a confusing process which can only serve as a deterrent to formal sector establishment.

13. While having some merits, the guichet unique is redundant, and implementation has actually increased the cost of exporting even though the export tax has been abolished.

The guichet unique is not without its merits. It appears to function smoothly, and procedures governing exports have been simplified in terms of documentation required and number of institutions involved. Nonetheless, the required fiche d'enregistrement statistique currently costs FCFA 6000-9000 depending on transactions inside or outside the CFA zone. This exceeds the cost of export licenses required before abolition of the export tax. Further, it has hurt groups such as onion exporters that previously were exempt from this requirement.

It is also difficult to understand the need for such an office since it duplicates functions already performed by Customs (which already had a system for registering exporters and importers and recording transactions). As the Ministry of Finance is ultimately responsible for tracking foreign exchange flows, there is no need to involve a new agency in the process. Finally, with only an export orientation, it overlooks the need to simplify investment procedures as it has export procedures.

14. The Government's approach to investors is still characterized by interventionism, rather than a commitment to free and open competition as the best way to achieve economic growth.

Investors wishing to establish operations that would compete with Government or parastatal activities face substantial difficulties in receiving investment approval. In such cases, the Ministry overseeing that sector has the power to reject the investment, rather than an independent investment approval authority. Similarly, the investment approval process is discretionary insofar as proposed investments that would compete with established businesses may be delayed as a result of pressure exerted by politically influential interests.

15. Foreign investors seeking to operate under the Investment Code must undergo a rigorous and lengthy approval process.

Police clearance procedures are overly lengthy and detailed, and can take several months to complete. Developing countries worldwide that have been successful in promoting both domestic and foreign investment have eliminated or minimized these requirements. While fear of unscrupulous investors is not unwarranted, the cost of completing such extensive security checks is excessive in terms of money, time, and foregone investment. The case of DHL, which took nearly two years to approve after lengthy inquiries and initial disapprovals, is a case in point.

16. A revised Investment Code was introduced in 1989 to simplify administrative procedures and promote labor-intensive and export-oriented SMEs. A new Investment Code is now under consideration that will aim to further simplify investment.

The new Investment Code will seek to a) simplify the number of incentive regimes, and b) introduce a <u>guichet unique</u> for the establishment of new enterprises. Efforts to further improve the Investment Code are important to improving Niger's ability to encourage investment. However, having just altered the Investment Code in 1989, the GON should be certain that a new code contains all required changes. Frequent changes or amendments to a country's Investment Code suggests uncertainty and inconsistency in policy, and that less favorable revisions are possible.

17. A key element of the new Investment Code will be the establishment of a guichet unique for investors, but such an institutional arrangement is not a panacea by itself.

The Government's commitment to promoting private enterprise and investment will best be measured by the elimination of regulatory, administrative and fiscal constraints imposed on the private sector. Countries worldwide have established guichets unique to expedite investment approval procedures, although many of these offices simply continue to operate "as usual." The speed with which investment applications are approved is not ensured by the creation of a new institutional body. Rather, it is the result of political will and commitment to the growth of the private sector.

18. The CNCE and the Chamber of Commerce in general are ill-equipped to provide adequate technical assistance to private sector enterprises, be they domestically focussed or engaged in international transactions.

Both the Chamber and CNCE lack a number of basic resources, such as computers and management information systems, important to improving the efficiency of operations. At the 1988 Round Table discussions, these institutions indicated a number of areas where additional resources could be used to improve services provided to businesses, particularly in the provision of training, but most of these have not received funding. While the CNCE is apparently efficient and well-run, the lack of resources and skilled support will continue to constrain the contribution it can make to assisting private sector activities.

19. The continued existence of the Economic Police Service is not compatible with an environment aimed at fostering business confidence and encouraging formal sector growth.

In 1974, a branch of the national police force was created to exercise control over individual and legal entities in the areas of economic, Customs, and tax matters. (This "service" is separate from the price control agents of the Ministry of Economic Promotion utilized during the years of price controls). The Economic Police are empowered to exercise control over individual Government entities with responsibilities in economic, tax and Customs areas, and are directly supervised by the Presidency, thus making it a highly powerful organization.

The Round Table discussions suggested a rationalization of the Economic Police's responsibilities and better coordination with those of the various Government agencies under its control. It is not clear, however, why such an entity is even necessary. The explicit purpose of such an entity is to exercise control over economic activities, an objective which is antithetical to the development of business confidence. Similarly, the control of the Economic Police by the Presidency is not likely to encourage

businesses to appeal to the Police Service in cases of disputes with Customs or tax authorities. Since designated Government authorities already have supervisory control in the areas of taxation and Customs, it is not evident why a further level of Government supervision is necessary. Moreover, the existence of a specialized economic control force is highly unusual, thereby placing Niger at a competitive disadvantage with its neighbors.

20. The trade regime: The elimination of import and export licensing requirements, the reduction of the number of prohibited imports, and the replacement of quantitative restrictions with tariff barriers have been significant liberalizations in Niger's trade regime. However, implementation has sometimes undercut the intended benefits of policy reform.

Sustained trade liberalization measures are necessary to achieve economic growth in an open Nigerien economy, in which imports and exports account for approximately 41% of GDP, and in which all departments have international borders. Moreover, such policies are realistic given the limitations of the Customs service. Border patrol and monitoring efforts are constrained by their use of only 12 vehicles, some of which are in disrepair and none of which are equipped with radio communications capacity (Abdellah, 1990). Despite the policy and regulatory problems mentioned above, the Government has significantly clarified the rules and procedures by which formal international transactions are to proceed.

The main task is providing the informal sector with sufficient services and incentives to conduct trade through formal channels on a competitive basis. In addition, contradictory implementation of new procedures and rules will undermine achievement of the greater objective of stimulating exports, as discussed in #13 above.

D. LABOR AND SOCIAL POLICY

21. The Labor Code: Niger's Labor Code is outdated and restrictive, making hiring and firing difficult and distorting the labor market.

The Labor Office's monopoly on recruitment of professional and technical school graduates has for years drained needed human resources from the broader labor market. While this is likely to change given the Government's fiscal crisis, it has still had a major impact on both private sector development and the rules governing labor in general. Restrictions on length of work contracts and hiring and firing practices have significantly reduced the factor of flexibility necessary to enhance market efficiency and encourage investment. Businesses are unwilling to hire workers according to formal sector regulations if it is difficult to rationalize their operations and cut their costs during down periods. While the Labor Code was to be revised by

June 1991 under the World Bank's Policy Framework Paper, this effort does not seem to be on track.

By contrast, recognizing that restrictive labor codes pose a deterrent to investment and economic growth, a number of Francophone African countries are liberalizing their codes. For example, Togo recently liberalized its Labor Code for export-oriented firms to attract foreign investment. Cameroon is currently revising its code to eliminate such restrictions for all firms, be they domestic, foreign, export-oriented or domestically-focussed. Similarly, Burundi is undertaking a revision of its Labor Code as part of a broader effort to promote small- and medium-sized enterprises.

22. <u>Wages</u>: Niger's wage costs are high relative to other countries in the region, thereby undercutting what should be one of Niger's comparative advantages.

Given the high value of the CFA and Niger's official compensation levels, Niger's labor force is economically uncompetitive with that of its neighbors. This is particularly true compared to Nigeria and Ghana which have undertaken substantial devaluations in recent years. While complete data are unavailable, it has been estimated that the minimum wage (SMIG) in Niger is equivalent to the salary of a skilled laborer in Nigeria. As shown in Exhibit 6, the fully burdened cost (e.g., minimum wage plus mandatory social benefits and vacation) of low-wage labor in Niger is high relative to non-CFA countries like Kenya, Burundi and Ethiopia. Moreover, while Cameroon (another CFA country) has an unburdened minimum wage (excluding benefits) which exceeds that of Niger (US$.47/hour vs. US$.38/hour), Cameroon's work force has substantially higher literacy and skill levels than does that of Niger.

23. <u>Human resource development</u>: Low levels of literacy and numeracy (15%) pose a substantial constraint to economic growth and investment in the formal private sector.

A recent World Bank study provides compelling empirical evidence that a well-educated population is crucial to the success of economic policies promoting international competitiveness and sustained development (Education and Development: Evidence for New Priorities, 1991). Furthermore, expanded education levels also enhance the effectiveness of health care, nutrition, and family planning programs. Exhibit 7 compares primary education levels in Niger with those found in a number of neighboring countries, and illustrates Niger's competitive disadvantage in this area.

This disadvantage has two implications for private sector development. First, it will slow the pace at which some private sector projects can be developed, as illustrated in the implementation of the WOCCU project which has been slowed owing to the need to train participants in basic numeracy and literacy.

Second, this comparative disadvantage will take many years to overcome. This underscores the strong need to continue to remove other constraints on private sector development in order maximize the efficiency with which Niger's limited available resources are used.

24. The high proportion of university students studying "lettres" indicates that the university system in Niger, as presently constituted, is not producing the types of management and technical skills needed to fuel economic growth.

A fundamental constraint on economic and private sector growth is the lack of management training and technically skilled employees entering the private sector work force. In 1988, 40% of Niger's university students were studying letters or humanities, while only 2% were studying agronomy. (The percentage of students studying letters has nearly doubled since 1980). Since students were historically guaranteed a job with the Government, there was little incentive to obtain skills relevant to private sector employment. The low percentage studying agronomy may reflect a desire to move away from the burdens of agriculture in a harsh and unreliable physical environment. Realistically, however, Niger can ill-afford to educate students who do not add to the country's skill base when there is a shortage of technically skilled labor. Furthermore, the lack of technical and management skills is likely to be a constraint on future formal private sector growth because skills will not be available for creating new enterprises or working in existing ones. There is no formal business management program at the university, and the closest program (Droit et Économie) attracts about 20% of the student body. Exhibit 8 highlights university students' areas of specialization in Niger, reflecting the conspicuous absence of business and management training.

E. Sectoral Analysis

25. Agriculture: Recent policy reforms in the agricultural sector are designed to assist with agro-exports.

In recent years, the Government has implemented the following important policy reforms: a) suppression of the export tax on all agro-pastoral products; b) abolition of the export and import licensing requirement; and c) establishment of a guichet unique for exporters. These efforts are designed to lower the economic cost of doing business and reduce barriers to entry for new exporters. Similarly, the elimination of Government monopolies on the marketing of agricultural products and the elimination of fixed agricultural prices has paved the way for increased competition in the agricultural sector.

Nonetheless, given the degree of informal trade that already exists in the agricultural sector (including cross-border), these policy

reforms have not yet had a major economic impact. One of the reasons, in addition to the informal nature of most agricultural trade, is that a number of administrative and regulatory procedures remain which are burdensome and sometimes discretionary in their application (Kulibaba, 1991). These can be grouped into the following five areas: a) needed approvals and authorizations; b) proofs of personal legitimacy; c) taxes and licensing fees; d) participatory contributions; and e) technical controls. (See Exhibit 9 for a description of these procedures.) The complexity and discretionary nature of the process combined with the cost of compliance indicates that regulatory controls continue to constrain the agro-industrial private sector, bar entry to new exporters, limit competition and impede economic efficiency. Furthermore, requiring compliance with these formalities adds nothing to Government revenues, and actually serves as an expense given the personnel and materials required for processing. The cost of road checks, discussed below (see #38), also weakens Niger's export potential without adding to Government revenue.

26. Livestock: Niger has introduced major reforms in the livestock sector, but an examination of other countries with similar resource endowments indicates that further measures are needed to fully exploit this sector's potential.

In Botswana, a landlocked country where 80% of the population lives in rural areas and livestock accounts for 80% of rural income, the country successfully exports beef duty-free to the European Economic Community. In fact, Botswana exports more beef to the EEC than it does to South Africa, despite the latter's geographic proximity. Botswana primarily exports canned beef, and enjoys an environment in which livestock are rarely subject to major disease. Bangladesh, where living conditions pose a substantial deterrent to investors, has recently attracted foreign investment into the leather sector, capitalizing on its local hides production. To generate greater value added from existing agricultural activities, Niger will have to provide attractive incentives to private investors for improved production, marketing and management such as internationally competitive tax rates, accommodating public sector administration, improved transport and other infrastructural facilities, and management autonomy.

27. Mining: Prospects for uranium earnings are likely to remain bleak, thereby pressuring the Government to reduce public expenditure or find alternative sources of revenue.

Uranium prices are likely to remain sluggish due to weak world demand, high levels of stocks, and discoveries of new deposits. Thus, the decrease in Government revenues from the mining sector during the 1980s is not a temporary downturn but a secular trend. This will require a restructuring of Government budgets to be properly scaled to realizable revenue targets. This may mean downsizing the role of Government in light of resource constraints.

The planned restructuring of the uranium industry may also lead to significant cutbacks in services currently provided by the mining firms in Agadez.

28. Gold mining is a growing informal sector activity which employs thousands when accounting for support services. The Government has done little to support it, missing an opportunity to provide basic infrastructure and services and, consequently, broaden the tax base.

While the Government is aware of this activity, it has taken no action to support it. Despite growing awareness and publicity, miners often work in unsafe conditions and are without basic services (e.g., health, education, water, tools). Meanwhile, by failing to provide basic services, miners and others have no incentive to pay taxes to the Government.

By contrast, Ghana recently made small-scale mining legal, and has established policies to support and improve the sector. This has involved education, training, and the provision of improved implements and techniques to increase productivity and safety. As a result, gold output by small-scale miners has made an important contribution to the increase in Ghana's gold production and export revenues in recent years. Exhibit 10 discusses Ghana's small-scale mining policy.

29. <u>Manufacturing</u>: Industrial development in Niger will continue to be constrained by the small size of the domestic market, the country's landlocked location, the high cost of inputs and competition from Nigerian enterprises.

While the Nigerian market, owing to its size and proximity, holds great potential for Nigerien agro-pastoral exports, it also represents a substantial competitive threat to the Nigerien industrial sector. Nigerian firms currently benefit from a devalued exchange rate, more sophisticated industrial base, subsidized energy prices, greater economies of scale, proximity to most of Niger's major markets and better labor rates. Should Nigeria's structural adjustment lead to growing per capita incomes, Niger will have an opportunity to increase its share of that country's agro-pastoral markets, depending on the future strength of the naira and local Nigerian production. Sustained and successful structural adjustment in Nigeria, however, will also translate into a stronger, more competitive industrial sector. This will pose a serious competitive challenge to remaining formal sector industries in Niger.

30. <u>Construction and public works</u>: The construction industry is suffering from a number of externally induced shocks.

The decline in the mining industry has had a sharply negative impact on the construction industry, and poor growth prospects for

the uranium industry mean that this sector will no longer fuel growth in the construction industry as it did in the past. In addition, future limitations or cuts in public investment will also adversely affect this sector. Finally, subsidization of energy costs in Nigeria will continue to make it difficult for Nigerien firms to compete with energy-intensive products from Nigeria (e.g., cement and building and finishing components), particularly as long as the CFA is overvalued relative to the naira.

31. <u>Commercial trade</u>: The beneficial impact of liberalization and policy reform introduced in recent years has been far outweighed by the general decline of Niger's formal sector.

While economic liberalization (e.g., removing price controls, dismantling parastatal monopolies, simplifying international transactions) should benefit private sector operators, they are not enough to stem the flow of informal trade. This has hurt the formal industrial and commercial trading sector, particularly as tax rates remain high and demand remains low for much of what the formal sector seeks to produce and sell. At the high end of the commercial trade sector, as embodied by SCIMPEX, the last enterprise to be established was in 1986. Some firms have withdrawn, and others are on the edge of failure.

32. <u>Tourism</u>: Tourism has potential as a future source of economic growth, but the sector faces competitive challenges which must be addressed.

Niger, with its desert attractions, fits into the category of "specialty tourism." This is a high margin subsector of the tourism industry where countries capitalize on unusual physical assets that appeal to smaller numbers of people. When managed well, specialty tourism attracts high paying visitors and contributes more to value added despite low volume. In this fashion, Costa Rica has successfully developed its tourism industry around whitewater rafting resources and ecological tourism. Zimbabwe has similarly used its high quality game parks to attract a select group of visitors. By contrast, Kenya, Senegal and the Bahamas are examples of low margin tourism in which substantial value added is dependent on a high volume of visitors.

Countries worldwide which have successful tourism industries are those where the private sector has led in the construction and provision of hotels and other services. Typically, special incentive regimes with very generous tax incentives are established to attract foreign investment or management skills, and management contracts are commonly utilized, particularly in light of the targeted promotional techniques which are needed to develop a specialty tourism industry. In addition, transport linkages are extremely critical (representing a private sector opportunity: privately-owned domestic airline company). Finally, tourism, like

any economic good, must be able to compete in the marketplace in terms of quality and cost.

If Niger is to expand its tourism industry, it must bear in mind that neighboring countries, principally Algeria, have similar tourist assets. Any policy to promote tourism must take into account the need to create an industry that is competitive. Niger has had some success to date in attracting adventure-seeking tourists, but currently the average cost of an expedition to Niger is 17% more expensive than in Algeria (GIE, 1991). This difference is accounted for by lower air transport costs between France and Algeria, the active parallel exchange market, and the elimination of taxes on petrol and vehicles used for tourism. Since Niger and Algeria are essentially competing for the same market, it may be necessary to design a tourism policy which further removes administrative or other constraints on the industry and provides greater incentives. Given the important role played by foreign investment in countries with successful tourism programs, it may also be necessary to improve incentives to encourage foreign investment.

Similarly, while the GON has eased some administrative procedures affecting tourism (e.g., eliminating the need for a photographer's permit), it may be necessary to examine whether other administrative procedures affecting tourism can be eased. For example, in Egypt, visitors can easily and quickly obtain visas upon arrival at the airport.

33. <u>Transport</u>: Transport system efficiency in Niger is critical given Niger's heavy reliance on imported manufactures and the importance of regional trade flows through Nigeria.

Transport costs are a significant component of marketing costs in African countries, particularly in long distance trade between the Sahel and the coast. As such, transport inefficiencies raise local costs of goods sold on the market and undermine export competitiveness. This is particularly true for livestock exports to markets in southern and central Nigeria, where Niger is facing increasing competition from producers in northern Nigeria.

34. The existence of a healthy but clandestine passenger sector suggests that there may be regulatory or other barriers to entry in the transport sector which should be eliminated.

Procedures governing entry by new entrepreneurs or those wishing to expand operations are discretionary, and in part are governed by competitors (Kulibaba, 1991). Barriers to entry appear especially high for transporters serving the livestock sector. If true, this poses a constraint on efforts to modernize the livestock sector and increase exports due to the shortage in livestock transport capacity. If the market is to function competitively, a) entry should be relatively simple and free, and b) firms seeking to

expand operations should not need additional authorization as is currently required.

35. Capital requirements for entering the transport sector are high, in part due to administrative and Customs fees.

Capital costs will necessarily be high due to the cost of imported equipment, but the imposition of fees raises the cost of entry even further. Purchasers must pay Customs duty to Nigerien authorities based on total amount paid (including transport and insurance). Payment of these additional fees and Customs duties adds an estimated 40% to the cost of a vehicle (Kulibaba, 1991). As a result, there is a very active informal market in vehicle trade, leading to foregone tax revenue for the Government.

36. The procedures governing new vehicle registration are overly complex.

There are 11 separate procedures requiring as many as 17 documents to establish a transport enterprise (see Exhibit 11 for a list of these procedures). Again, the complexity of the process serves as a barrier to entry for new transporters.

37. Higher licensing and other costs in Niger place Nigerien transporters at a competitive disadvantage against Nigerian transporters.

Registration and licensing procedures in Nigeria are less costly, and no formal authorizations are required for either the establishment of transport enterprises or vehicle purchase. Combined with subsidized petrol prices, these lower costs give Nigerian transporters a competitive edge both in Niger and in the region.

38. There has been a substantial escalation in police demands for bribes, thereby raising transport costs and offsetting the potential economic benefits that could be gained from the current oversupply in transport capacity.

Bribes paid to police have reportedly worsened substantially over the past five years, and account for as much as 20% of total expenses incurred by operators of common 17-passenger minibuses. This has long been an area of complaint by merchants and the Transporters Union. An informal survey indicated that the frequency of road checks appears to be rising, and while figures vary, the lowest cost cited was 1000 CFA. These bribes represent a substantial diversion of potential Government revenue to unofficial sources. It has been estimated that bribes paid by transport operators are equivalent to FCFA 11 billion per year, or approximately 10% of 1990 Government revenues (GEMINI, 1990). These bribes are informal taxes, driving up local costs while serving as export taxes. They also serve as a disincentive for

firms to operate in the formal sector, thereby reducing the Government's potential tax base.

39. To promote transport sector efficiency, efforts to restrict transporters' movements to <u>départmental</u> or other finite geographic areas should be avoided.

To maximize benefits to be gained from an open economy geared to cross-border trade, the availability of transport services should not be constrained. Niger's good and relatively extensive road network gives the country an advantage, and enables commerce to flow freely. Any attempt to restrict transporters' movements or geographical access could sharply undermine this advantage, leading to greater inefficiencies and higher costs.

III. THE PRIVATE SECTOR IN NIGER

The following chapter is designed to highlight the private sector role in the economy. Given the nature of Niger's economy, special effort has been made to explore the contribution of the informal sector to GDP and employment, and to clarify its role in industrial and service sector activities.

A. PRIVATE SECTOR OVERVIEW

1. Private Sector: The private sector contributes approximately 75% to Niger's Gross Domestic Product (GDP) and accounts for 98% of employment.

Based on 1988 figures, the private sector contributed FCFA 519 billion to Niger's total GDP (FCFA 696 billion), or 74.5%. Most of the contribution was made in agriculture (including livestock), artisanal manufacturing, commerce, and other services. With nearly comparable GDP in 1983, the private sector contributed 75% that year as well. Minor differences existed in the distribution of private sector contribution to GDP during those years, with artisanal production and varied services increasing slightly while livestock value added has declined. The six-year (1983-1988) average for private sector contribution to GDP was 73%. Exhibits 12-17 show private sector contribution to GDP from 1983-1988 on a current FCFA basis, with the private sector share growing due to the role of the informal sector. These exhibits also show the sectoral contribution of parastatals and the Government. Exhibits 18-19 graphically depict the aggregate sectoral breakdown of 1988 GDP in current FCFA and as a percentage of total GDP. Exhibits 20-23 show Niger's GDP and per capita income trends relative to Africa.

As for employment, approximately 98% of the population works in the private sector. The vast majority of people work in the agricultural sector (1.8 million, or 77% of total), while most others work in commerce, other services, and artisanal manufacturing. Private sector employment is largely characterized by independent and family labor in the rural areas, and jobbers and apprentices in the artisanal sectors. It is also not uncommon for people to have more than one job and to work in more than one sector of the economy, particularly given the relatively short rainfed farming season Niger has. Exhibits 24-26 highlight estimates of private sector employment in 1988 by economic activity, type of sector and gender.

2. Informal Sector: Niger's economy is almost entirely informal except for basic Government services, and parastatal participation in the mining, transport, communications and power-generating sectors.

Informal sector GDP was FCFA 494 billion in 1988, or 71% of total. This compares with FCFA 470 billion in 1983, or 67.5% then. Perhaps more revealing, the 1988 informal GDP figure represented a sharp increase from 1987: FCFA 72 billion in additional GDP, and a 6.3% incremental contribution to GDP on a current basis. The informal sector appears to have grown since 1988, indicating an even greater informal sector share of GDP. It is also very likely that both GDP and informal sector value added are understated due to the inability to statistically capture informal production and distribution (see below). Exhibits 27-28 show informal GDP in absolute FCFA and as a percentage of total GDP in 1988.

Informal sector employment accounted for about 97% of total employment in Niger in 1988. Niger's economically active population approximated 2.31 million in 1988, and 2.26 million worked informally (refer to Exhibit 24). Data are not available for a time series analysis, although there is general agreement that formal private sector employment has declined while Government employment has increased. Neither of these sectors is particularly important in employment compared to the informal sector.

3. Given the nature of the informal sector, it is likely that official GDP figures are understated.

One source claims that international transactions, primarily cross-border trade with Nigeria, are underestimated by as much as 50% (Economist Intelligence Unit, 1990-91). This would imply that a) international trade (exports and imports of goods and services) approximated FCFA 430 billion in 1988, as opposed to the official figure of FCFA 287 billion; and b) Gross domestic product would approximate FCFA 835 billion, or 21% higher than official statistics. Given that some of the merchandise trade involves goods produced in Niger (e.g., agricultural, livestock and agro-processed), the informal sector probably plays an even greater role in the artisanal (e.g., hides and skins) than officially acknowledged. Informal service sector operators (e.g., transport, commerce) have long played a role in the distribution of imports and exports, and their contribution to GDP is also likely higher than officially acknowledged. By avoiding taxes, informally distributed goods also provide the public with finished consumer goods in an economy characterized by weak purchasing power.

The 1989 census conducted by the USAID-sponsored GEMINI project in Maradi and Dosso discovered that enterprises were substantially undercounted by the Ministry of Plan (MOP). GEMINI's estimates of enterprise densities were twice those of the MOP in larger towns, and five-six times as high in rural areas. (Primary non-farm

employment in rural settlements was comparable to much of the rest of Africa, at 50/1000 people; in the rural towns, Niger's 95/1000 lagged behind African standards by about half, at 187/1000, due to lower levels of female participation in the labor force and lower levels of income). While these enterprises were/are often very small-scale, they nevertheless contribute to GDP. Key tables from the GEMINI study are highlighted in Exhibits 29-30.

In response to growing awareness that informal sector statistics were undercounted, the MOP's Direction de la Statistique et de la Démographie (DSD) had conducted a census and survey in 1987-1988 that captured significantly revised information on the informal sector. Key findings, published in a report (Augeraud, 1990), correspond to many of GEMINI's findings and include the following:

a) DSD estimates there are 292,144 informal enterprises in Niger excluding agriculture and livestock, but including 1,500 people engaged in informal sector mining and 30,000 household workers;

b) The revised DSD estimate is almost exactly twice the original estimate, lending credence to GEMINI's enterprise densities in larger towns;

c) The 292,144 informal sector enterprises employ 389,557 people (1.3 per enterprise), about 85% of non-agriculture employment;

d) The aggregate contribution of this sector to GDP is about 30%;

e) Informal employment, including agriculture and livestock, constitutes 97% of total employment;

f) The mix of informal employment is geared primarily toward the self-employed and jobbers (52% of the total labor force), and family labor (43% of total);

g) Among those employed outside of agriculture (452,389, or 20% of total employment), 85% are in the informal sector, usually self-employed and in services such as commerce, transport, household jobs and food preparation;

h) The informal sector covers a wide range of industrial and service sector activities, and often is not "purely" informal in that many of these enterprises pay the <u>patente</u> and are registered at the local level;

i) Many informal enterprises operate like the formal sector and generate comparable revenues, except that they do not pay taxes to the central government; of the 470 firms formally registered in 1987 with the Déclaration Statistiques et

Fiscales, 150 had annual revenues of less than FCFA 25 million, about average for the larger informal sector firms polled by DSD;

j) The informal sector is heterogeneous in its character as reflected by scale size (one employee for small rural enterprises to seven for larger urban enterprises), value added (FCFA 444,000 for small rural enterprises to FCFA 35 million for large urban commercial establishments), and level of management sophistication; and

k) Most of the informal sector operates on a simple cash basis, does not use any particular accounting system, and is often characterized by illiteracy in French.

While most informal activity is characterized by low margin, low technology output in substitutable products, the sheer mass of activity suggests that what is not captured in official statistics may represent a significant contribution to GDP. Exhibits 31-33 are sourced from the DSD technical report on its 1987-1988 informal sector survey.

4. <u>Modern Private Sector</u>: While the informal sector grows, the modern private sector is in a state of serious decline.

The modern private sector has never been large in Niger, amounting to only FCFA 52.5 billion in 1983, or 7.5% of total. This figure has declined since, dropping to only FCFA 25 billion in 1988, or only 4% of total GDP. The most precipitous decline was in 1988, and this trend appears to have worsened since.

The two largest business associations for the modern sector, SPEIN and SCIMPEX, count only 45 private sector firms among their members. Their combined private sector members accounted for only 3,500 employees in 1988, while SPEIN's parastatal employees numbered 7,341. SCIMPEX's 14 members, all private sector, have seen aggregate revenues decline from FCFA 52 billion (1980) to FCFA 31 billion (1990), the number of employees drop from 1,080 (1980) to 838 (1990), and expatriate management dwindle from 271 (1980) to 13 (1990). All 14 companies are experiencing net losses, and most are filling specialized, niche roles in the market rather than attempting to expand, diversify and capture larger shares of the market. Part of the decline in the modern private sector relates to the fall in uranium prices, and the negative impact it has had on Government revenues, public works and construction activity. Other reasons include high taxes assessed on the formal private sector to compensate for the limited tax base available, the ability of the informal sector to capture market share at the expense of the formal sector (e.g., building materials, commerce), and a costly administrative burden due to Government documentation requirements regarding tax clearance, licensing of imports, etc.

Exhibit 34 shows the modest contribution of the modern private sector to Niger's GDP from 1983-1988.

Due to the problems facing the modern private sector, it has been unable to expand to be able to absorb Niger's growing labor force. Employment in this segment of the economy was estimated to be between 15,000-28,000, or a maximum of 1.2% of the total economically active population. With the economically active population projected to be as high as 5.1 million by 2000, one of the major challenges facing Niger is how to promote a dynamic, efficient, prosperous modern private sector. Failure to do so leaves little alternative to the low margin activities of the informal sector. Exhibit 35 presents population growth scenarios in Niger.

B. SECTORAL DISTRIBUTION OF PRIVATE ENTERPRISE IN NIGER

5. Agriculture: The informal private sector is responsible for agricultural production, employing 77% of the economically active population and accounting for 39% of GDP.

The rural agricultural sector is considered entirely private sector. The Government employs approximately 1,500 in the agricultural sector, primarily in research, extension, data gathering, statistical analysis and administration. An estimated 2,222 people in the formal private sector are found in the rural agricultural sector, although it is difficult to identify their impact. By contrast, 1.8 million worked "informally" in the agricultural sector in 1988, or 77% of Niger's economically active population. There is no sub-sectoral employment distribution within the agricultural sector, largely because people are primarily subsistence and rotate between food crop production and livestock.

The agricultural sector contributed FCFA 271 billion to GDP in 1988, Niger's best year since 1983 when this sector produced FCFA 286 billion in goods. Agricultural (food crop) production accounted for FCFA 153 billion (22% total GDP), nearly as high as in 1985 when Niger began recovering from the devastating 1984 drought. The livestock sub-sector continued to climb, contributing FCFA 98 billion in 1988 (14% of GDP). While this total is inferior to 1981-1983 (average FCFA 115 billion), it represents the third consecutive year in which value added increased. The forestry and fishing sub-sectors remained small, adding about FCFA 21 billion to 1988 GDP (3%). Exhibits 36-40 highlight agricultural production in Niger, including its position compared to other African countries.

6. While the majority of people make their living from agriculture and livestock, GDP and employment ratios are declining, reflecting increasing urbanization and desertification.

Official statistics place 77% of the economically active population in the agricultural sector, although this may well constitute an underestimation of the real total given the cross-over of activity in the economy (GEMINI, 1990). For instance, artisanal metal workers are often farmers, just as students often return home during the rainy season to assist their families with food production. Nevertheless, based on official statistics, the share of the labor force in agriculture has declined from 95% in 1965 to 91% in 1980 and 77% in 1988. This would be consistent with declining trends in agriculture sector contribution to total GDP, from 68% in 1965 and 43% in 1980 to 39% in 1988.

Meanwhile, although Niger remains almost entirely rural or desert, the urban population is growing about 8% per year (vs. 3.4% total). The urban population is currently about 18% (1.35 million), as opposed to 7% in 1965. Urban residents are projected to be 27% in 2000 and 34% in 2010. Given the Government's weak tax base, this will place an increasing burden on the private sector to provide needed jobs and services in cities and large towns. The extent to which the Government accommodates the private sector to be "formal" will determine the extent to which the Government will have a tax base to be able to provide the normal infrastructure and services expected in urban life. To date, with a shrinking modern private sector, most of the unemployment problem has been addressed by the informal sector. Exhibits 41-42 show Niger's urbanization compared to other African countries, and projected trends through the year 2010.

7. Official statistics suggest agriculture is not particularly significant as an input into modern manufacturing and export earnings.

From 1984-1987, agro-industrial value added (e.g., food processing, beverages, textiles, hides and skins, paper products) was FCFA 26 billion, or only 6% of industry value added. This is a comparatively low figure by African and global standards, and is partially distorted because of the importance of uranium mining to national GDP. Nevertheless, agro-processing was only 13% of manufacturing from 1984-1987, compared to about 30% in Senegal. It is difficult to quantify the private sector contribution to agro-industry, although the modern private sector contributed approximately 62% of total modern (formal) manufacturing value added. It is probable that most agro-industrial value added was private sector.

According to the Ministry of Plan, agro-related exports totaled only FCFA 10 billion, or 7% of total exports in 1987-1988. (Citing the BCEAO and other sources, the Economist claims Niger exported FCFA 29.5 billion in live animals and cowpeas alone during the same period.) As mentioned earlier, international transactions are underestimated in official statistics due to the substantial informal cross-border trade with Nigeria and other neighbors. As such, it appears that Niger exports animals, cowpeas, onions, peppers, hides and skins and other agro-based products to neighboring markets, and in quantities noticeably greater than what is officially reported. Being in the informal sector, this is all clearly private sector activity. On the other hand, Niger's resource constraints (e.g., water), limited market knowledge, and traditional agricultural practices limit the degree to which it can become a major exporter of agricultural and agro-processed goods.

8. Niger's official statistics claim nearly 100% self-sufficiency in cereal production, stable livestock yields, and growth in counter-seasonal horticultural production. Cereals self-sufficiency is contested by non-Government sources.

Niger's trade self-sufficiency ratio in cereals has officially been about 97-98% since 1985, despite declining or stagnant yields in sorghum and millet. Farmers have made up for declining yields per hectare by increasing the area under cultivation. Arable and permanent cropland approximates 3.5 million hectares for millet and 1.4 million hectares for sorghum, with about 3% of the country's total land mass under cultivation. Niger is still the largest regional producer of these commodities. Rice, maize and wheat appear to have added slightly to Niger's cereal production, particularly paddy rice.

Nevertheless, emergency relief experts who monitor Niger's cereal production believe the country averages about a 10% deficit. With declining yields per hectare, a fragile environment, and 3.4% population growth, demand is very likely to outstrip domestic production in even greater numbers. The variance between Nigerien production and consumption appears to have been made up through informal distribution.

Livestock yields have been fairly stable in recent years, despite slow progress in replenishing the cattle population since the 1984 drought and a gradual decline in the amount of permanent pastures available to livestock herders (9,270 hectares in 1988 vs. 10,626 hectares in 1975). Cowpeas have shown a dramatic increase in output since 1986, as have onions and tomatoes. Niger's cowpea output is significantly higher than that of its Francophone neighbors. These trends point out the resilience and adaptability of Niger's agro-pastoral private sector in a harsh physical environment. Exhibits 43-49 reflect recent official agricultural trends in Niger by product.

9. It is difficult to determine the impact of policy reform on agricultural production given recent adoption and implementation in a conservative farming environment.

The Government began liberalizing pricing on most agricultural products with the 1986/1987 agricultural marketing season. However, there was little impact as most of these crops (e.g., millet, sorghum, cowpeas) were consumed, used to build up stocks, or marketed privately. The Government continued to set producer prices for cotton and rice in 1988/1989, but these commodities are not produced in abundance in Niger and are generally marketed privately. Further, agricultural production is hampered by input distribution problems (e.g., weak demand, risk aversion, adherence to traditional farming techniques), structural credit constraints (e.g., weak banking system, perceptions of bank loans as "free" Government money, high cost of informal finance), and output marketing weaknesses (e.g., post-harvest losses, lack of cold storage, lack of agro-processing facilities) that producer prices only indirectly affect. As such, it is difficult to determine the impact of policy reform on primary sector output. In some cases, such as Nigeria's focus on exports, potential buyers for Niger's home grown output (e.g., SONITEXTIL and cotton) have been overwhelmed by more attractive prices for finished goods coming across the border. Exhibit 50 highlights selected producer prices and output in recent years.

10. <u>Mining</u>: The mining sector has steadily declined in the 1980s due to falling world market demand.

Niger's mining sector, about the only real modern component to the nation's industrial sector, has declined as a measure of GDP since the early 1980s. Both production and value have dropped consistently throughout the decade, declining from 8% of GDP in 1983 to 6% in 1988. This has been particularly difficult for Niger as uranium exports typically account for 79% of export earnings (1980-1986), necessary for debt service and critical imports. Mining exports were about 7% of total Government expenditure from 1981-1986. In 1988, mining accounted for 61% of total industry. Exhibits 51-52 show the decline of the Nigerien mining sector in the 1980s. Exhibit 53 reflects Niger's industry in the 1980s, most of it reflecting the decline in uranium mining. Exhibits 54-55 illustrate the contribution of mining and manufacturing to GDP.

The mining sector is considered parastatal because of the Government's (via ONAREM) 33% interest in Somair and 31% in Cominak, two consortia that are primarily managed by French companies. The mines employ approximately 4,200 people. The French are Niger's largest uranium customers, followed by the Japanese, Spanish and Germans.

11. Informal sector gold mining is attracting strong interest, and contributing nearly FCFA 4 billion to annual GDP.

Since 1983, informal mining has increased its contribution to GDP from FCFA 2 billion to nearly FCFA 4 billion. While not particularly significant as a percentage of GDP (0.5%), the DSD believes the number of informal miners increased nearly 100% between 1987 (about 1,500) and 1990 (3,000). Other sources claim there are as many as 10,000 informal miners and 20,000 support workers associated with this activity. Given Niger's rich mining potential, this may later turn out to be a growth sector.

12. <u>Manufacturing</u>: Niger lacks a sophisticated manufacturing tradition, but has a large network of artisanal producers who make practical products suited to the needs and purchasing power of the local market.

Manufacturing continues to represent a small percentage of GDP, only 7.5% between 1983-1988 (FCFA 296 billion/3,958 billion). Most of this was from the informal artisanal sector (82% of total manufacturing), which has shown steady growth since 1981. It is also likely that the contribution of informal manufacturing to GDP is understated for reasons mentioned above. Exhibit 56 shows the evolution of the manufacturing sector's contribution to GDP and its position relative to other African countries.

The GEMINI study's profile of Niger's metals sub-sector offers some insights into market segmentation, technical capabilities, and pricing in the manufacturing sector. This sub-sector provides a range of services and applications, primarily in household goods, basic farm implements and transport-related products. The cost of inputs is low as scrap metal is usually reshaped and welded into a new product. As such, credit is usually not a constraint as working capital requirements are low. There is a range of skill levels, from traditional blacksmiths to more sophisticated welders. Household goods tend to be basic, low-technology and in high demand given population growth and relative cheapness. Farm implements are basic (e.g., hoes, weeders, rakes, axes), with little differentiation in quality and payment often made in-kind in the form of farm labor. Transport-related products (e.g., carts, baggage carrier racks) represent the high end of the market, with output limited by weak purchasing power. This particular market is also characterized by a strong repair market in the service sector. Thus, the metals sub-sector highlights key manufacturing activities that are artisanal, tailored to specific market needs and purchasing power constraints, characterized by differing levels of technology and technical skills, and conducted often by individuals who also farm or pursue other economic activities as primary or secondary sources of employment.

13. While the artisanal manufacturing sector grows, the modern manufacturing sector is shrinking into oblivion.

The formal manufacturing sector showed a precipitous decline in 1988 value added after years of stagnation. In 1988, formal sector manufacturing accounted for less than 1% of GDP. Thus, neither the modern private nor parastatal manufacturers are particularly significant in Niger. Obstacles to modern manufacturing growth include a) the high cost of imported inputs for any kind of intermediary manufacturing operation; b) weak domestic demand, limiting the benefits to producing on site; c) lack of technical skills, although GEMINI's study of the metals sector demonstrated varying levels of specialization and rapid acquisition of skills; d) lack of experience in modern management, including directing medium- and large-scale enterprises; e) unavailability of term capital, either debt or equity; f) lack of market knowledge, market contacts, and familiarity with non-traditional technology; and g) regulatory, legal and social restrictions, including land tenure and the role of women in the economy. (Refer to Exhibits 12-17 for manufacturing trends relative to GDP showing growth of the informal sector and simultaneous decline of the relatively marginal formal sector.)

14. The manufacturing sector is far less important as a source of employment than agriculture and services.

The manufacturing sector accounted for 63,690 jobs in 1988, 95% of which were found in the informal artisanal sector. (Aside from commerce, food preparation and hotels, manufacturing is the only sector where women are found in greater numbers than men; in 1988, 35,630 women found employment in manufacturing compared to 28,060 men). This compares with 1.8 million in the agricultural sector, and nearly 400,000 in commerce, restaurants, and other services. Nevertheless, estimates of the number of people employed in manufacturing may suffer from the same confusion as GDP and rural labor statistics given the rotation and cross-over of economic activity. As pointed out in the GEMINI chapter on metals, informal manufacturers are often farmers with rudimentary skills who are capable of making relatively simple farm tools and other implements for the local market. Thus, the number of manufacturers may in fact be larger, just as the number of people working part-time in mat weaving, hides and skins and other manufacturing sub-sectors may be undercounted. This would apply to both men and women, primarily men who are farming and women who are working in households. (Refer to Exhibit 24 for a look at employment in the manufacturing sector relative to the general economy.)

15. <u>Commerce and Tourism</u>: Commerce has long been a tradition in Niger, and it is the second most important sector in the economy after agriculture.

As with most African economies, commercial trade plays an important role in terms of GDP and employment. It is difficult to quantify the exact contribution commerce makes to GDP because a) most of it is informal; and b) official statistics aggregate it with restaurants and hotels. Officially, commerce, restaurants and hotels accounted for FCFA 591 billion in value added from 1983-1988, or 15% of total GDP. The informal sector represented FCFA 499 billion of that, almost entirely in commerce and food preparation. The formal private sector contributed an additional FCFA 61 billion, making the entire private sector contribution to commerce, restaurants and hotels about 95% of total.

While informal sector activity is focused on trade and food preparation, there is little informal sector activity in tourism and hotels. The EEC (FED) has assisted some of the "groupements d'intret economique" in the Agadez region with tourist promotion, but tourism and hotels are primarily in Niamey and managed by the private sector. Total capacity in 29 hotels approximates 1,083 rooms, and the hotel sector is estimated to be operating at about 40-50% occupancy rates. As with construction and public works, tourism in Niger has suffered from the decline in uranium prices and shortfall of business tourism. Total non-resident visitors, more than 90% of the trade, have declined from 40,438 in 1984 to 24,592 in 1988. Exhibit 57 highlights hotel capacity and trends since 1984.

Formal sector commercial trade, never particularly significant, has diminished in recent years. While these figures also include hotels and restaurants, modern sector activity has declined from a peak FCFA 18 billion (3% of GDP) in 1984 to FCFA 12 billion (2% of GDP) in 1988. As with the rest of the formal economy, 1988 was a year of decline that appears to have continued since. In addition to the traditional European trading houses either scaling down (e.g., SCOA, CFAO, Peyrissac) or leaving (e.g., Unilever), the parastatal sector has also seen value added drop with the rationalization of COPRONIGER and SONIDEP. The earlier discussion of SCIMPEX members' declining revenues, net losses and reduced employee levels highlights the state of deterioration in formal private sector trade. Most of the remaining formal commercial houses provide a limited array of specialized, high margin products. With the average urban informal commercial enterprise's value added at FCFA 35 million without much of a tax burden (Augeraud, 1990), the formal sector is unable to compete. Exhibits 58-59 provide a profile of services in the national economy and the contribution made to GDP by commercial trade, restaurants and hotels. Exhibit 60 shows Niger's service sector growth trends in the 1980s relative to Africa (as measured in current US dollars).

16. Employment levels in the commerce, restaurants and hotels sector account for 9% of total.

In 1988, an estimated 208,370 people worked in commerce, restaurants and hotels, 98% in the informal sector. Adding the modern private sector, 99% of total employment in this sector was private sector. Trade and food preparation are key economic activities throughout Niger, with significant employment concentrations that suggest that employment figures may be underestimated (GEMINI, 1990). It is significant that this sector represents the single greatest source of officially reported employment for women (112,700 in 1988). Key employment figures in the commerce, restaurant and hotels sector are shown in Exhibit 24.

17. <u>Other Services</u>: Miscellaneous services, including Government, household jobs, social work, cultural and recreational activities, banking, insurance, real estate, and mechanical vocations make a substantial contribution to GDP and employment.

This sector of the economy contributed FCFA 916 billion to total GDP from 1983-1988, about 23% of total. This varied collection of activities also provided 203,190 jobs in 1988, or 9% of total employment. Most of this sector's activities are in Government (FCFA 575 billion in value added from 1983-1988, and about 19,000 employees including parastatals in this sector). Nevertheless, the vast majority of employment (179,136) is found in the informal sector. Given the relatively limited role of formal finance (e.g., banks, insurance), it appears that most of this sector's contribution to GDP is in low paid miscellaneous services (e.g., repairs, watchmen). There is a very limited role from the formal private sector or parastatals in these economic activities, and it appears to be in the financial, insurance and real estate sectors. Exhibits 58-59 highlight this portion of the economy in terms of GDP. Employment figures are shown in Exhibit 24.

18. <u>Transport/Communications</u>: The transport and communications sector contributes about 4% to GDP and employs about 14,870 people.

Communications consist primarily of Government-owned enterprises such as television and radio stations and the PTT. GDP contribution was FCFA 16 billion from 1984-1987, or less than 1% of total. Employment in the communications sector is reported to have been 2,083 in 1987.

Transport makes a far larger contribution to GDP and employment, representing one of the most segmented markets in Niger. The sector (along with communications) contributed FCFA 158 billion to GDP from 1983-1988, 4% of total. Transportation was likely about FCFA 135 billion of that contribution, most of which was from the private sector (77%). Most of that contribution came from informal

transport operators. Of the 14,870 employees found in the combined sector, 10,671 are informal transporters. An additional 1,180 are found in the modern private sector, totalling 11,851. SNTN and NITRA, both parastatals, employed 1,800 in 1988. Exhibits 24, 58 and 59 break down employment and value added from the transport and communication sectors.

Based on the GEMINI study's findings, the transport sector is characterized by the following:

a) Excess passenger and freight capacity due to heavy investment before the fall in uranium prices;

b) A profitable, relatively autonomous parastatal (SNTN) which benefits from Government and parastatal shipments to/from Cotonou;

c) Free market pricing as legal freight tariffs are ignored, resulting in market prices about 50% of legislated prices;

d) Competitive passenger rates based on service differentials (e.g., cars charge 20% above official rates because they are smaller and can leave earlier since they wait less time to fill up);

e) Widespread use of Nigerian vehicles and low-budget fuel; and
f) Payments to police at checkpoints that amount to 20% of the transport cost of a 17-passenger minibus, a situation that has worsened in recent years.

Thus, as with most African countries, the transport sector is a dynamic industry comprised of formal and informal operators that compete on pricing, volume and service differentials. Most startling in the GEMINI report was the estimated FCFA 11 billion in payments made at checkpoints, equivalent to roughly 10% of 1990 central Government revenues.

19. <u>Construction</u>: The construction sector is almost entirely private sector, but has been hurt by falling uranium prices and the decline in public investment.

Construction and public works contributed FCFA 168 billion to GDP from 1983-1988, a bit more than 4%. Virtually all of this came from the private sector (94%). Thus, its contribution is comparable to the transport and communications sector. In 1988, the sector employed 14,430 people, also nearly identical to the transport sector. About 86% of construction employment came from the private sector, mostly informal (67%). Noteworthy about the sector is the change in GDP distribution, and the erosion of the modern private sector. Despite a slight uptick in 1986-1987, the formal private sector has seen its position decline while the role of the informal sector has increased. With the anticipated

departure of Maurice Delens, there is expected to be minimal participation from the formal private sector in the construction industry. Exhibits 24, 58 and 59 provide an overview of the construction trade and public works.

C. THE ROLE OF PARASTATALS IN THE NIGER ECONOMY

20. Industry Coverage: There are 49 parastatal enterprises across all sectors of the economy, although some of these have recently been liquidated or privatized.

In the food processing (technically manufacturing) and livestock sector, parastatal enterprises have included RINI (rice), SICONIGER (groundnuts), SOTRAMIL (millet), SONERAN (livestock), LCE (livestock), UAB (livestock), and OLANI (milk). Some of these have involved Government involvement in partnership with foreign investors (e.g., SICONIGER), while others have been Government research facilities (e.g., SONERAN, LCE, UAB). In most cases, these enterprises have run up losses due to impractical public policy. For instance, despite Government attempts to guarantee RINI a share of the market, RINI has been ineffective due to the degree of informal rice trading that is conducted. SICONIGER cannot compete with imported vegetable and groundnut oil largely because the Government doubled the producer price of groundnuts in 1985, and these purchases constitute 80% of SICONIGER's total production costs. SOTRAMIL, recently privatized, has had problems competing with local millet flour makers, and has problems with packaging and equipment. OLANI has had problems similar to SICONIGER, with regulated purchasing prices rendering OLANI uncompetitive with imported milk products.
In the mining sector, ONAREM owns more than 30% of the Cominak and Somair consortia responsible for uranium mining. This is a key sector in which the Government intends to stay fully involved given uranium's strategic importance as a source of export earnings, modern sector skills and technology transfer, and Government tax revenue.

In the manufacturing sector, parastatals have included the aforementioned food processing companies as well as SONITAN (hides and skins), SNCP (hides and skins), SNC (cement), SONICERAM (ceramics), SONITEXTIL (textiles), SINN (printing), ONERSOL (alternative energy), and smaller operations in the paper and metals sectors. As with food processing, some of the manufacturing enterprises have involved both Government and private foreign investment (e.g., SONITAN, SONITEXTIL). These companies are generally unprofitable and/or insignificant in terms of market share. In the case of SONITAN, the Government's "privatization" of its own shares was done in a way that imposed management, marketing, and operating conditions on the original investor who had been successful in producing for the European market. The original investor withdrew, and SONITAN (now SONITRAN, and with a

new French owner) is currently operating at low capacity utilization rates, producing lower quality hides, and carrying stocks that it cannot effectively market and which are depreciating in value. SONITEXTIL, once a supplier of high margin textiles to the Nigerian market, has suffered from poor cotton production and bad management. Other enterprises such as SNC and SONICERAM are uncompetitive due to high energy use/costs and have been hurt by the decline in construction and public works.

In the service sector, the Government established COPRO-NIGER (staples trade) and SONIDEP (oil products) to compete with the original French trading houses built up during the colonial period. SONARA (groundnut marketing) was created by the Government to manage the commercialization of groundnut products that had been developed by the French during the colonial period. These enterprises have fared poorly, while playing enough of a role to encourage CFAO, SCOA and Peyrissac to downsize their activity in Niger. Key parastatal enterprises are also represented in the power (NIGELEC, SINOCHAR), transport (SNTN, NITRA), and communications (ORTN, OPT) sectors. Performance in these cases ranges from profitable (SNTN), effective provider of services (OPT with mail, NIGELEC), highly subsidized (NIGELEC, ORTN), carrying a heavy debt load (SONICHAR) and running up huge losses (ORTN). Exhibit 61 provides a current list of parastatals.

21. <u>GDP</u>: Parastatals are estimated to have contributed 13% to 1983-1988 GDP.

Most of the parastatal sector's contribution to GDP is found in the mining sector, where the Government controls approximately 30% of consortia shares through ONAREM. Mining constituted 54% of parastatal value added from 1983-1988, or roughly 7% of total GDP during the period. Aside from mining, only power (2% of total GDP) and transport and communications (1% of total GDP) made material contributions from the parastatal sector. The remaining share of parastatal GDP came from the banking and finance sector, manufacturing, construction, tourism and commerce. In 1984, parastatal deficits were estimated at FCFA 10 billion.

A general decline in parastatal activities has led to less contribution to overall GDP, although the 11% 1988 figure hardly deviated from the norm (13%). In recent years, COPRO-NIGER has lost its monopoly, OPVN's marketing role (including personnel, transport fleet and stocks) has been reduced, NIGELEC is losing its role providing power to the mining sector (to SONICHAR), and non-viable public enterprises such as UNCC, SONIFAME, SONARA and CNCA have been liquidated. Refer to Exhibits 12-17 for the distribution of parastatal GDP. Exhibit 62 highlights some of the key financial and economic indicators of 16 of the 49 parastatals sampled by the World Bank and Ministry of Finance.

22. Employment: The parastatal sector provided less than 1% of total employment in 1988.

Employment in the parastatal sector was estimated to be 10,950 in 1988, about 0.5% of total employment. (There is difficulty in specifying employee levels, as some Government employees work for parastatals and vice-a-versa). These employees are distributed through virtually all non-agricultural sectors of the economy, with the largest share (30%) in the mining sector. A sampling of 16 key parastatals showed employment levels at these firms peaking in 1987 (9,828), and declining to 9,589 in 1989. Nevertheless, this represents only a net decline of 82 since 1983. Refer to Exhibit 24 for parastatal sector employment.

23. Capital Structure: Parastatal debt has been significantly reduced since 1983, but investments have also significantly declined.

Based on the aforementioned sampling of 16 parastatal enterprises, long- and medium-term debt has been cut from FCFA 61 billion in 1983 to FCFA 46 billion in 1989. SONICHAR represents about half that sum, suggesting the other 15 enterprises have far less severe debt loads. Short-term debt has also been reduced, from FCFA 62 billion in 1983 to FCFA 44 billion in 1989. However, while bank debt declined, parastatals attempted to substitute supply credits as a short-term financing source. Nevertheless, payables increased only FCFA 3 billion (consolidated balance sheet comparison from 1983 to 1989), reflecting unwillingness on the part of suppliers and the national treasury to provide backing and credits to parastatals such as NIGELEC, NITRA, ONPPC, OPT and RINI. New capital has also not been forthcoming to recapitalize the parastatals to become more efficient. Investments peaked in 1986 at FCFA 18 billion, declining ultimately to FCFA 6 billion in 1989. This, in turn, reflects a series of weaknesses inherent in parastatal enterprises for years: a) reliance on debt as a source of recapitalization, rather than running operations profitably to retain earnings; debt reduction from the Government and parastatals has meant a decline in funds available for investment into the parastatals; and 2) lack of profit-oriented management to ensure individual enterprises were run as economic units as much as possible, rather than as social units subsidized by the national Treasury.

24. Credit: Parastatals formerly received a large share of credits available in the banking system, and non-performance on that debt has stifled formal private sector development.

The banking system rarely extends credit these days, and then it is usually for short-term commercial trade. As of July, 1990, the banking system had FCFA 105 billion outstanding in credit, 94% of it short-term. According to the BCEAO, 73% of these credits were out to private sector enterprises, although this also appears to

include whatever loans are also out to parastatals. The largest customers were wholesale and retail traders (54%). It is significant that only four sub-sectors in the economy had long-term loans outstanding, and that these constituted a mere 1% of total loans: unspecified service sector loans, transport and storage, wholesale trade, and agriculture. Exhibits 63-64 review the current credit position of the banking sector.

The short-term nature of the banking system currently reflects inability and unwillingness to take on risk. While some of this has to do with regulated interest rates and monetary and credit controls, it also has to do with the degree of non-performing loans in the consolidated banking sector portfolio. At July, 1990, fully 44% of the banking system's credits outstanding to the economy were non-performing. Parastatal share of this was 78%, reflecting a source of funds that would otherwise have been useful in providing the term credit so needed for modern private sector development.

The failure of the BDRN and liquidation of the CNCA reflect problems with credit management in the parastatal banking system, as well as mismanagement on the part of borrowers, many of whom were also parastatal enterprises who believed the national treasury would be a perennial source of operating subsidies. These two banks had 76% of all loans outstanding and 53% of total consolidated bank assets in 1985 (Ohio State, 1987). Nevertheless, a substantial portion of both were non-performing, leading to the collapse of these two institutions, paralyzing the banking system.

A plan to restructure the BDRN was adopted in June, 1990, resulting in the creation of SONIBANK. This plan, supported by the World Bank and France, called for new equity investment, the freezing of all non-performing loans and equivalent public sector deposits, and new management. A Tunisian financial institution holds 25% of SONIBANK's share capital and has appointed a managing director. The estimated FCFA 36 billion in BDRN non-performing loans and equivalent public sector deposits were transferred to a separate agency expected to collect these loans from 1990-1993, freeing up deposits upon collection. SONIBANK took over the BDRN's performing assets and an equivalent amount of liabilities, mostly private sector deposits. The result, however, is a significantly reduced balance sheet and an institution that will likely proceed cautiously in terms of credit allocations, portfolio term structure, and branch expansion. Exhibit 65 provides an overview of the consolidated banking system's balance sheet reflecting heavy reliance on foreign financing. Exhibit 66 reflects Niger's low interest rates relative to the rest of Africa, although few people borrow from or save with the formal financial sector.

25. <u>Privatization</u>: Niger has not been successful in effectively privatizing parastatals due to a difficult investment climate, weak information systems, poor assets, limited market share, the absence of professional management, and lack of available capital.

Privatization of parastatal enterprises has not proceeded very effectively in Niger for a number of reasons that plague other privatization and parastatal restructuring campaigns throughout Africa:

a) Valuation procedures focus on book asset values rather than cash flow;

b) The Government insists on determining the quality of submitted dossiers and rejecting offers if the purchase price is less than what the Government wants, even when those enterprises are losing money and receiving Government subsidies;

c) The private sector is not invited to be involved in formulating privatization policy;

d) Enterprises with "management contracts" are managed by civil servants with limited or no private sector experience;

e) The Government claims jobs need to be protected even when an enterprise needs to be scaled down and rationalized to be competitive and profitable; and

f) A small domestic investor base, limited foreign interest, weakened banking system, and difficult regulatory and fiscal policy stifle demand from the investment side.

Added to these generic problems are a) Niger's lack of modern, professional enterprise management skills; b) the enterprises' weak competitive structures and heavy debt loads; and c) an unattractive period in which to invest as Nigeria pursues a liberalized trade and growth strategy.

By July, 1990, the Government had declared its intention to retain 31 public enterprises, privatize 16 and liquidate seven. The Government fully or partially privatized 11, and liquidated six. Nevertheless, the method by which the Government privatized some of these enterprises was unsustainable, insisting on loaded purchase prices without factoring in debt service, loss of operating subsidies, high overheads, and retained employees. According to one account (Club du Sahel, 1988), examples abound of Government mismanagement of the privatization process, largely due to conflicting policy objectives or interference in enterprise management. This, in turn, has made the local private sector wary of taking over parastatals whose debt and mounting losses the Government must continue to absorb. To the extent that the local private sector lacks experience in directing large- and

medium-scale enterprises of the sort the Government is privatizing, foreign management would be the only alternative option. Here too, the Government has not created the business climate needed to attract foreign investment and compensate for the inherent difficulties of Niger's market. Exhibit 67 profiles Government plans regarding individual parastatals. Exhibit 68 shows external public and private sector disbursements in Niger in 1988 relative to the rest of Africa.

26. Donor Involvement: The World Bank and France are working with the Ministry of Finance and public enterprises to strengthen information and management systems.

Recognizing that privatization prospects in Niger are unpromising, the World Bank has been working with the Ministry of Finance to develop the institutional capacity of public enterprises and strengthen management. An information system with key financial data has been established to track important financial and employment data. This includes equity, turnover, profitability, subsidies, taxes paid, progress with debt service, personnel costs and employment levels. Professional management contracts have been signed with several enterprises, including the OPT, NIGELEC and SONICHAR. These efforts have also received bilateral support from France.

D. LEADING AND LAGGING SECTORS IN THE ECONOMY

27. Miscellaneous informal sector services, agriculture, Government, and informal artisanal manufacturing are Niger's leading economic growth sectors.

A quick 1988 vs. 1981 comparison shows the following sub-sectoral rankings in terms of growth (and assuming a minimum 1% contribution to GDP): a) miscellaneous informal sector services growing FCFA 33 billion; b) agriculture (net of livestock, forestry and fishing) growing FCFA 27 billion; c) Government growing FCFA 25 billion; and d) informal artisanal manufacturing growing FCFA 21 billion. While a strict year-to-year comparison can certainly not determine secular trends, growth in all of the above except agriculture has been steady throughout the 1980s. Miscellaneous informal services and informal manufacturing showed an increase in value added every year between 1981-1988, while Government increased each year from 1981-1987 and remained relatively stagnant in 1988. Agriculture increased steadily from 1981-1983, stagnated from 1984-1987, and then rebounded in 1988 on the strength of crop production.

The trends in miscellaneous services and artisanal manufacturing, both informal private sector, are particularly important relative to their modern sector competitors. The combined increase in informal services and manufacturing was FCFA 54 billion (105%) compared to the FCFA 8 billion (36%) decline in modern private and

parastatal manufacturing and miscellaneous services. Thus, it is clear that the informal sector began replacing the formal sector in these areas of economic activity, and that the trend is likely to continue. Exhibits 69-70 highlight GDP trends and Niger's major growth sectors in the 1980s.

28. Formal private sector interests in the construction, commerce and tourism industries and parastatal mining have shown the greatest declines in the 1980s.

Following the same 1988 vs. 1981 comparison, the greatest declines in contribution to GDP came from the following: a) modern private sector construction and public works contractors (FCFA 20 billion decline); b) modern private sector firms engaged in commerce and tourism (FCFA 12 billion decline); and c) the modern mining sector, almost entirely parastatal, which declined FCFA 8 billion. As with the leading sectors, a year-to-year comparison cannot determine secular trends, and it appears that all three lagging sectors rebounded briefly during the mid- or late 1980s, only to fall again in 1988 or before. Modern private construction steadily declined from 1981-1985, and then grew slightly in 1986-1987 before plunging to its worst year in 1988. Modern private commerce and tourism showed some growth in 1987 before falling to its lowest point in 1988. Parastatal mining has shown spikes in its trends, being relatively stagnant in 1981-1982, increasing in 1983, declining and stabilizing in 1984-1985, declining and stabilizing again in 1986-1987, and then declining again for its worst year in 1988.

It is worth noting that the informal sector grew approximately FCFA 21 billion (26%) in these three lagging sectors while the formal sector declined FCFA 38 billion (39%). Thus, as with the leading sectors, it appears the informal sector is either outcompeting the formal sector or moving into areas of production or distribution where the formal sector is no longer viable. These trends are highlighted in Exhibits 71-72.

E. GENERAL ECONOMIC TRENDS AND THE ROLE OF THE PRIVATE SECTOR

29. Merchandise trade and the current account: Determining the value of exports and imports is nearly impossible due to the degree of informal trade running across neighboring borders.

Merchandise trade numbers are all different, and it is therefore impossible to know the real total. As mentioned earlier, the Economist believes cross-border trade may be 50% greater than officially stated. According to the BCEAO, Niger's merchandise exports have declined since 1987, with the FCFA 98 billion total in 1989 the lowest since 1978. Probably about 20% was from the private sector. However, due to weak purchasing power, merchandise imports were estimated at FCFA 107 billion in 1989, also the lowest total since 1978. If these totals approximate reality, Niger's

merchandise trade deficit was FCFA 8 billion. This deficit was exacerbated in 1989 by the FCFA 64 billion paid primarily for debt service, transport and insurance, and in net private transfers out of the country that were only partially offset by short-term Government inflows (presumably from donors) of FCFA 44 billion. This left Niger with a current account deficit of FCFA 28 billion, its largest since 1985.

The current account deficit is negative in that it reflects an exhausted economy. Nevertheless, there are some structural improvements to the deficit relative to past years. First, while merchandise exports have declined, so have imports and net payments for services. Second, Niger's private capital flight peaked in 1985 at FCFA 25 billion after having risen every year since 1978. Those transfers have since declined every year since 1986, and were about half in 1989 than in 1985. However, given the likely underestimation of merchandise, service and capital flows, these data should be interpreted with caution. BCEAO figures are presented in Exhibit 73 highlighting Niger's merchandise trade, current account trends, and balance of payments. Exhibits 74-77 reflect the structure and growth trends of Niger's merchandise trade compared to other African countries.
As for effects on the private sector, the decline in imports in the 1980s suggests lower purchasing power and increasing informal trade. It is likely that both export and import figures are higher than officially stated, reflecting increased agro-pastoral exports (e.g., live animals, hides and skins, cowpeas, onions) from Niger to Nigeria while Niger imports consumer goods in return.

30. <u>Balance of payments and debt service</u>: Niger's balance of payments continue to reflect dependence on donor assistance, although ODA disbursements declined in 1989.

Niger has relied on long-term donor assistance throughout the 1980s to shore up its capital position. This is partly due to the decline in uranium earnings in the 1980s, periodic drought, and recognition of general resource depletion in Niger. ODA disbursements were US$ 283 million in 1989, the lowest in several years and below the 1985-1988 average of US$ 368 million. (The reader is referred to the MAPS <u>Articulation of USAID Strategy</u> report and the UNDP 1989 Development Report for a discussion of donor assistance).

Despite declining disbursements, Niger's long-term debt has climbed to about US$ 1.5 billion in 1989 compared to US$ 250 million in 1975. The total debt figure is somewhat lower than had been incurred due to write-offs, and most of Niger's loans today are disbursed in grant form.

As for private sector impact, debt service will still linger as a cost to the Government. To keep inflation rates manageable, this will likely limit money in circulation and, consequently, credit

allocations once the banking sector is revived. This process will also reinforce the role of informal finance, where financial costs are high. Exhibits 78-82 highlight some of Niger's key debt figures and illustrate its debt position relative to other African countries.

31. Investment and remittances: Investment in general, and private investment in particular, is one of the major weaknesses of the Nigerien economy.

Niger's total investment in the modern sector has declined in both the public and private sectors. In 1981, gross capital formation was FCFA 61 billion, with FCFA 35 billion (57%) representing private sector investment. In 1988, total investment was FCFA 14.5 billion, with only FCFA 5 billion (33%) in the private sector. Direct foreign investment and net private transfers have been insignificant or negative throughout the 1980s and into the 1990s.

The net reduction in formal private investment between 1981 and 1988 occurred in the following areas: a) transport (FCFA 18 billion); b) commercial trade and tourism (FCFA 9 billion); and c) manufacturing (FCFA 3 billion). Formal private investment has fluctuated in construction, the financial sector and real estate, and mining, and been virtually non-existent in agriculture and power generation. Exhibits 83-84 highlight private investment in the modern sector of the economy from 1981-1988. Exhibits 85-86 point out Niger's low gross domestic savings and investment as a percentage of GDP and relative to Africa.

32. Government expenditure and the Public Investment Program: The Government's Public Investment Program for 1990-1992 is focusing on rural development and infrastructure.

The Government has budgeted FCFA 273 billion for public investment during the 1990-1992 period. These are ranked as follows: a) rural development (FCFA 101 billion, or 37%); b) infrastructure (FCFA 93 billion, or 34%); c) education (FCFA 16 billion, or 6%); d) health (FCFA 14 billion, or 5%); and e) other (FCFA 49 billion, or 18%). The two largest components are expected to help with economic and private sector development. By definition, rural development should help farmers and livestock herders in agro-pastoral production and exports, although this remains to be seen. Investment in infrastructure is expected to mainly involve rehabilitation of transport, telecommunications and water supply facilities. The PIP is being financed largely by donor grants.

33. Factor costs of production: Niger's factor costs of production are high by regional and world standards, making it imperative that Niger cut costs in other areas to be competitive.

Given Niger's landlocked position and poor resource base, it is an expensive country in which to operate. Electricity and telecommunications costs are generally high throughout the region. In Niger, the risk of higher energy costs is high as Nigeria currently provides subsidized electricity to Niger. That government has stated costs will go up when the contract expires in 1996. In addition, telecommunications costs are high due to Niger's isolation.

34. The growing labor force: Niger's population aged between 15-64 years is expected to grow from 3.7 million in 1990 to 5.1 million in 2000 and 7.1 million in 2010. Approximately 84% of these people are currently classified as economically active, suggesting the economy will need to create more than one million additional jobs by the year 2000 to maintain the status quo.

Niger's population is increasing at a high 3.4%, and urban growth rates are increasing faster. The result is that Niger's labor force is expected to increase an average net 120,000 per year from 1991-2000, with many looking for jobs in the urban manufacturing and service sectors. This will put increasing pressure on the Government to provide basic services for production and market operations as well as for health care and education. With such growth rates, a shrinking formal private sector, and weakened parastatal and public finance, it is likely that Niger will experience significant growth in its informal sector for the rest of the century. Exhibit 87-88 highlight key demographic indicators in Niger.

F. PERSONALITY AND CHARACTER OF THE PRIVATE SECTOR

35. General: The private sector is overwhelmingly informal, small-scale, rural and self-employed.

As discussed earlier, more than 97% of total employment is in the informal sector. The average size of informal enterprises is 1.3 employees, with most people working independently or as family labor on farms. Independent laborers usually are male farmers and/or livestock herders, while family labor often applies to women and children working as farm labor. These two classes of labor constitute 93% of the total work force. Those who work as informal employers, jobbers, apprentices and in other jobs (e.g., household) account for about 67,290 jobs, or 3% of the total work force. This latter group is found in towns as well as the countryside.

36. <u>Sexual division of labor in the informal sector</u>: Informal sector employment is overwhelmingly male, and lack of female participation in the economy is one of the reasons why enterprise and employment density in rural areas is about 50% of the norm for Africa.

The vast majority of the informal sector work force is male (1.8 million, or 79% of the total informal work force). Men represent most of the independent and family laborers (1.7 million of 2.15 million), jobbers and apprentices (24,770 of 29,640), and employers (4,670 of 5,290). Women account for about 460,590 of informal sector jobs, usually family labor or independent work. The latter is usually in commerce and food preparation (112,700), or artisanal (craft) manufacturing (35,630). Lack of female participation in the economy has been cited as one of the main reasons why Niger lags behind Africa in enterprise formation in rural areas (GEMINI, 1990). Refer to Exhibits 25-26 for the gender distribution of Niger's labor force by occupation.

37. <u>The formal private sector</u>: Employment estimates vary, but there is consensus that its former role in the economy is being replaced by informal sector operators.

Employment estimates of the modern private sector vary from 15,024 to 27,900 (refer to Exhibits 24-25). Even taking the larger estimate, this would account for only 1% of total employment. As for contribution to GDP, the modern private sector has declined throughout the 1980s, contributing only FCFA 247 billion from 1983-1988, or 6% of total. Its FCFA 25 billion in 1988 value added (4%), its worst year possibly in decades, reflects its demise.

38. But how weak is the formal private sector?: While clearly diminishing in importance, the formal private sector's role may also be understated by official statistics.

According to the roster of 470 formal sector firms that file their Déclaration Statistique et Fiscale, 421 were private sector and the rest parastatals. Among the formal private sector firms was the following distribution:

a) Commerce (130);
b) Construction (67);
c) Office supplies and equipment (50);
d) Transport (29);
e) Hotels, cafes and restaurants (22);
f) Public works (18);
g) Recreational, mechanical and household (18);

h) Health, sanitation, education, associations (17); and
i) 70 other enterprises in livestock (2), food processing (16), paper and printing (12), chemicals (7), machinery and equipment (6), textiles and leather (6), wood (3), construction materials (4), metals (3), and financial services (11).

Under the current economic circumstances, it is likely that many of these formal private enterprises are understating turnover to reduce their tax burden. In light of the informal sector's ability to compete with the formal sector and expand market share, this would be a logical response. In addition, just as many informal sector firms operate in a way similar to formal sector firms, the reverse is likely to occur as a means of surviving as an enterprise. However, in the end, none of this should obscure the declining role of a severely weakened formal private sector in Niger. Some of the firms registered with DSF have gone out of business, reflecting that general weakness.

39. <u>Business associations</u>: There are no significant cross-sectoral private sector representative groups or institutions in Niger.

SPEIN is influential, but its membership includes a large proportion of parastatal sector firms. SCIMPEX is wholly private sector, but has only 14 members, all of whom are in financial difficulty. The view appears to be widespread that the Chamber of Commerce is an arm of the Government, rather than an organization truly dedicated to assisting private enterprise.

At the small-scale end of the spectrum, a recent USAID survey report (Iddal, 1990) revealed that syndicates, associations, cooperatives and non-governmental organizations all face a number of hurdles to becoming effective representatives of private sector interests:

a) Complicated registration procedures for people inexperienced in this domain;

b) Lack of technical assistance from Government sources in addressing registration requirements;

c) Delays in approvals, during which time these organizations cannot act, leading to loss of interest among potential members;

d) Financial and overhead (e.g., telephone, office) constraints; and

e) Inability to generate results, leading to member apathy and general ineffectiveness.

While most of the 41 associations surveyed have a post office box (94%) and telephone (81%), few have a telex (18%) or FAX (7%). Most (57%) disseminate information by convening a meeting, which often times is viewed by members as talk without action. All of these obstacles reinforce a spiral of organizational lethargy in the private sector while the Government lacks organized, constructive dialogue with representatives of the informal sector. Exhibit 89 lists organizations surveyed by USAID.

40. Chamber of Commerce: The Chamber of Commerce is active, but widely perceived to be ineffective in promoting private enterprise.

While all formal sector enterprises are members of the Chamber of Commerce, this is not a truly representative organization because a) membership is mandatory, b) all employees are hired by the Government and paid by the Treasury, and c) the Chamber's senior staff is appointed by the Government. Among the 41 associations surveyed by USAID in 1990, 72% were formed independent of the Chamber of Commerce. This reflects a feeling among the vast majority of informal and small-scale enterprises that the Chamber of Commerce does not effectively represent their interests. Exhibit 90 lists key Chamber of Commerce organizations and members.

By contrast, membership in the Chamber of Commerce is voluntary in most of Latin America and in many Anglophone African countries. In Ghana, the Chamber of Commerce and Association of Ghana Industries have been active lobbying groups for the private sector, and count nearly 3,500 members among them. In Cameroon, where the Government has established the Chamber of Commerce under the aegis of the Ministry of Industry, there are four significant private sector groups in which membership is entirely voluntary and whose representatives are freely elected. Two such groups have also recently been established in Cape Verde, including one which is comprised almost entirely of traders. In the Gambia, the Association of Gambia Entrepreneurs (established by the graduates of a USAID-funded training program) has 350 dues-paying members, comprised mostly of informal sector businesses.

41. Non-governmental organizations (NGOs): Niger has a limited collection of NGOs engaged in enterprise development, and an expansion of this role will be necessary for small-scale enterprise development to transcend its current limitations and to assist with the delivery of social services.

Niger's NGO community has an umbrella organization called Groupement des Aides Privées (GAP) with 26 members as of December 1989. Only four of these organizations are indigenous, with the rest based in Europe or North America. Not all NGOs are members of GAP.

Some of the NGOs active in Niger include volunteers from several nations (e.g., France, Canada, Germany, Japan, the U.S.), private

voluntary organizations (e.g., CARE, WOCCU, CLUSA, CARITAS) and missionary organizations. Some of these organizations are working on a series of enterprise development projects involving a) artisanal skills development in woodworking, metals, auto mechanics and construction (e.g., French, Canadian and German volunteers, CARITAS); b) integrated enterprise management involving appropriate technology, project administration and credit (e.g., CARE, WOCCU); and c) professional, private sector-oriented management of cooperatives (e.g., CLUSA). In addition, the FED (EEC) has worked closely with small-scale operators in the agro-processing, hides and skins, textiles, artisanal and tourist trades to promote sustainable enterprise development in these areas. While this list is not exhaustive, it represents some of the main organizations operating in Niger.

G. SOCIAL INFRASTRUCTURE AND THE PRIVATE SECTOR

42. Health care delivery: Niger's health care system is weak, providing an opportunity for private sector and NGO activity.

In light of the Government's limited fiscal resources, it would be wise to encourage expansion of the NGO role in private sector development, including the delivery of social services such as health care. Given the weak position of Government finances, the only formal sector pharmaceutical production appears to be with ONPPC and SOGANI, although the 135 formal sector commercial traders registered via the DSF offers potential health care distribution outlets. While most of these are in Niamey or Maradi, many are wholesalers likely to have other retail contacts throughout the country. Greater NGO involvement in enterprise development will likely offer opportunities for improved social service delivery at the grass roots level. A more regional review of health care production capabilities may also be warranted, such as contacting Parke-Davis in the Dakar Free Trade Zone. Exhibits 91-96 reflect key health care statistics in Niger relative to Africa. Exhibit 97 provides focus on specific incidence of diseases in Niger during the 1980s.

43. Education: Niger is one of the least formally educated countries in the world, and this will serve as a brake on formal private sector development.

The private sector role in education is limited. There were 60 (3% of total) private institutions out of a total 2,266 in 1989. These private schools had 6,851 students (2% of total) in 1989. Many of these private schools are Koranic schools.

In addition to the limited role of private education, the Government has traditionally promised jobs to those with university educations (see Chapter II, #24). This has served as a disincentive for Niger's most formally educated youth to pursue

careers in the private sector. As shown in area of study trends (refer to Exhibit 8), most students are pursuing letters rather than specializations that would be practical for business (e.g., management, finance, accounting, organizational theory, labor-management relations). Even areas somewhat related (e.g., law and economics) are tangential to business management, and often steeped in legalistic approaches more appropriate to a system top-heavy with regulation, administration and bureaucracy. Such mismanagement of the educational system in light of Niger's critical professional and business needs has undermined formal private sector development. Paradoxically, this has amounted to the Government providing a disincentive to students to enter the formal private sector, the one area of the economy where there is potential for expanding the tax base the Government needs to provide basic services.

However, the issue goes far beyond the number of university students who have opted for a career in the civil service. Niger's literacy rates in French are estimated at 15% of the population. What is clear is that Niger's business culture is indigenous, a system of values in which trust and word of mouth are more critical than legal documents and financial statements. In this sense, the clash between Government and the informal private sector is more than just an issue of taxes and regulations. What is also clear is that the formal sector as a whole is either diminishing in importance (e.g., modern private sector, parastatals) or desperately dependent on outside assistance (e.g., Government) while the informal sector adapts and fills the vacuum of short-term needs. This may continue indefinitely, but for Niger to develop the institutions it requires for long-term growth, it will eventually need a larger cadre of educated private sector individuals than it currently has. This will be critical not just for more efficient production, but for social services that the Government cannot and will not be able to afford for many years to come. Exhibits 98-100 highlight key education statistics in Niger, including student majors at the university.

ANNEX I:

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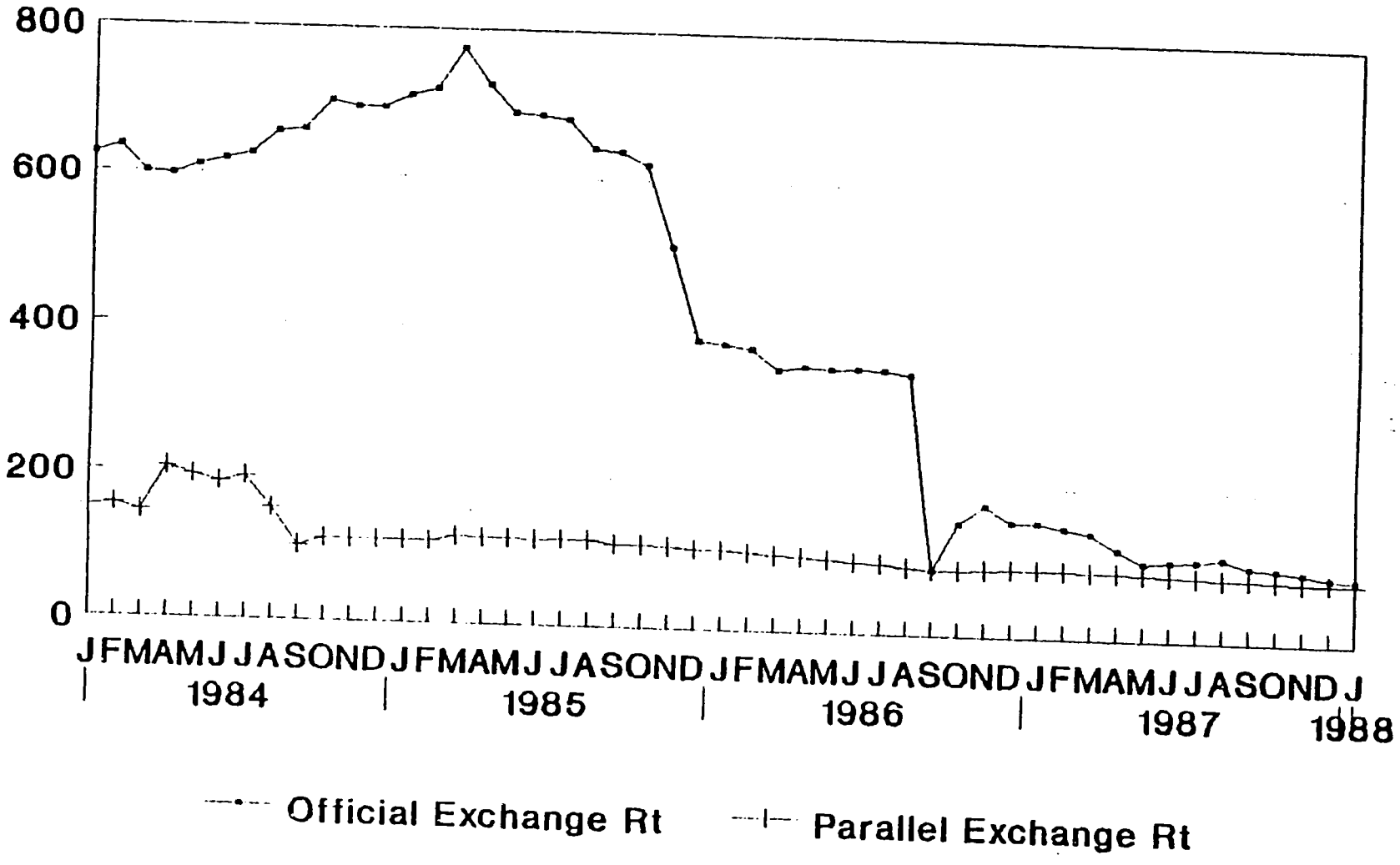
ANNEX II:

Exhibits

EXHIBIT 1

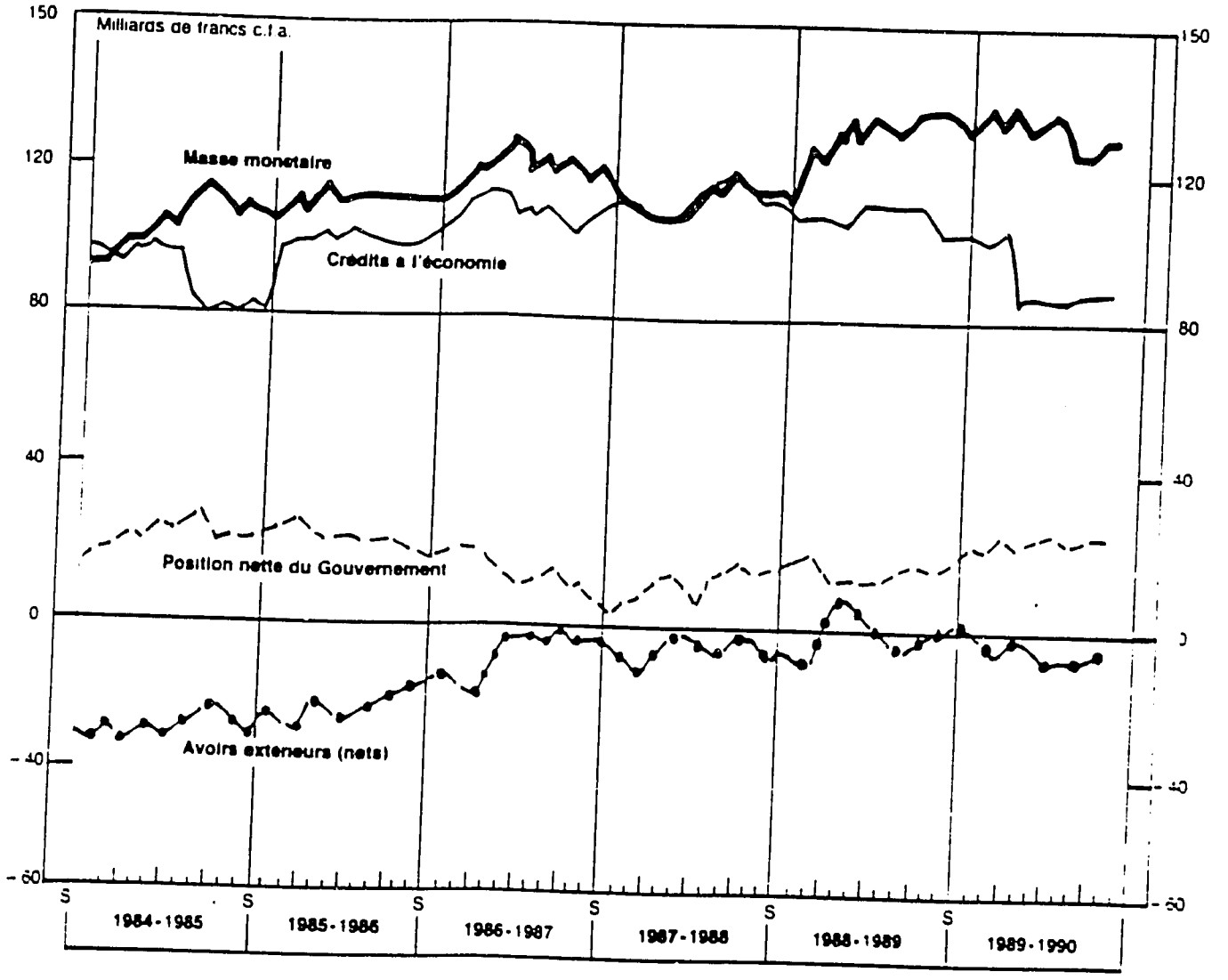
EXCHANGE RATE, CFA FRANC WITH THE NAIRA



Source: Ministère du Plan, Direction de l'analyse économique et de la planification, Etudes et Conjoncture.

EXHIBIT 2

NIGER - SITUATION DES INSTITUTIONS MONETAIRES



Fin de période	Avoirs exterieurs (net)	Credit interieur	Position nette du Gouvernement	Credits a l'economie	Actif = Passif	Masse monetaire (a)	Autres elements net
	Millions de francs c.f.a						
1985 - Juin	- 23 417.2	104 931.4	22 515.2	82 416.2	**81 514.2**	111 678.6	- 30 164.4
Septembre	- 19 511.6	105 515.1	22 921.8	82 593.3	**86 003.2**	108 926.2	- 22 923.0
Decembre	- 28 842.4	127 030.1	26 592.9	101 362.7	**99 113.2**	108 105.1	- 8 991.9
1986 - Mars	- 28 373.6	125 653.1	24 311.0	101 542.1	**97 479.5**	114 321.1	- 16 841.5
Juin	- 21 419.4	124 290.2	25 504.5	98 785.7	**102 870.8**	113 500.9	- 10 630.1
Septembre	- 17 767.0	126 620.3	19 923.5	106 096.8	**108 253.3**	114 473.1	- 6 219.8
Decembre	- 19 235.1	133 803.1	19 107.5	114 695.6	**114 568.0**	121 051.3	- 6 483.3
1987 - Mars	- 4 260.5	120 171.6	11 870.4	108 301.2	**115 911.1**	121 630.6	- 5 719.5
Juin	- 181.1	116 104.7	11 609.9	104 494.8	**115 923.6**	122 439.5	- 6 515.9
Septembre	- 3 990.0	114 639.7	2 901.7	111 738.0	**110 649.7**	113 733.2	- 3 083.5
Decembre	- 10 406.4	119 610.1	11 358.5	108 251.6	**109 203.7**	114 442.9	- 5 239.2
1988 - Mars	- 3 323.4	120 063.7	6 956.0	117 107.7	**120 740.3**	126 426.9	- 5 686.6
Juin	- 2 784.0	130 446.8	19 168.5	111 278.3	**127 662.8**	131 704.1	- 4 041.3
Septembre	- 6 637.7	124 139.3	15 230.1	108 909.2	**117 501.6**	123 583.2	- 6 081.6
Decembre	- 3 506.2	118 073.2	12 185.8	105 887.4	**121 579.4**	131 795.2	- 10 215.8
1989 - Mars	- 68.3	122 116.7	11 901.2	110 215.5	**122 185.0**	135 900.3	- 13 715.3
Juin	- 2 745.8	125 151.1	17 616.3	107 532.8	**122 405.3**	136 603.7	- 14 198.4
Septembre	- 717.5	126 167.3	20 989.7	105 177.6	**126 884.8**	135 633.3	- 8 748.5
Decembre	- 4 589.3	114 365.5	24 239.4	90 126.1	**109 776.2**	139 459.3	- 29 683.1
1990 - Mars	- 8 942.3	111 942.6	24 316.5	87 626.1	**103 000.3**	130 541.3	- 27 541.0
Avril	- 7 931.6	113 183.8	24 264.8	88 919.0	**105 252.2**	125 966.9	- 20 714.7
Mai	- 9 596.4	113 480.9	24 609.0	88 871.9	**103 884.5**	125 253.6	- 21 369.1
Juin	5 415.4	114 682.7	261 138.6	38 544.1	**109 267.3**	129 609.9	- 22 342.6
Juillet	- 6 660.7	114 276.7	25 157.2	89 119.5	**107 616.0**	130 246.2	- 2 313.2

EXHIBIT 3

GROWTH OF MONEY SUPPLY

Average Annual Nominal Growth Rate
Percent

	1980-88
Uganda	77.8
Zaire	59.4
Sierra Leone	50.6
Ghana	45.0
Somalia	42.4
Zambia	28.9
Botswana	25.1
Tanzania	21.5
Mauritius	20.2
Lesotho	18.8
Zimbabwe	18.1
Malawi	17.7
Madagascar	16.3
South Africa	15.8
Kenya	14.9
Chad	14.4
Burkina Faso	12.9
Mali	12.3
Mauritania	12.1
Ethiopia	11.9
Nigeria	11.9
Cameroon	10.8
Rwanda	10.5
Burundi	9.9
Togo	8.9
Congo	8.6
Senegal	7.6
Cote d'Ivoire	7.1
Gabon	6.5
Central African Rep.	6.3
NIGER	***6.1***
Benin	5.1

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 202-203.

EXHIBIT 4

U.M.O.A. - INDICE GENERAL DES PRIX A LA CONSOMMATION AFRICAINE

	1985	1986	1987	1988	1989
			Base 100 : Annee 1970		
Ouagadougou					
1er trimestre	334.4	325.3	315.0	325.0	319.6
2ème "	335.5	333.0	314.8	330.3	327.0
3ème "	343.6	329.1	318.6	332.5	334.7
4ème "	327.5	318.6	320.4	335.0	337.3
Annee	335.3	326.5	317.2	330.7	329.7
Bamako (a)					
1er trimestre	529.7	585.0	452.8	507.6	
2ème "	579.5	593.5	449.5	530.6	
3ème "	637.1	557.9	525.5	571.6	
4ème "	591.4	511.3	500.1		
Annee	584.4	561.9	482.0		
Niamey					
1er trimestre	398.3	381.6	366.0	379.1	346.4
2ème "	415.6	397.4	364.8	363.5	352.9
3ème "	428.0	424.0	382.9	366.5	368.7
4ème "	402.3	388.5	370.9	354.9	354.7
Annee	411.1	397.9	371.2	366.0	355.7
Dakar					
1er trimestre	432.0	481.2	463.6	457.8	448.6
2ème "	454.1	478.1	460.1	449.0	451.4
3ème "	465.4	487.2	472.5	462.6	469.3
4ème "	478.0	499.3	466.1	458.2	467.0
Annee	457.4	486.5	465.6	456.9	459.1
Lome					
1er trimestre	354.8	378.3	377.4	379.4	377.6
2ème "	366.1	386.2	381.8	386.0	377.3
3ème "	362.4	373.9	376.5	373.0	373.9
4ème "	363.9	368.4	371.9	372.8	363.9
Annee	361.8	376.7	376.9	377.8	373.2
Abidjan (ouvrier, employe, artisan)		Base 100 = Août 1984 - Juillet 1985			
1er trimestre	...	108.9	115.8	125.6	128.7
2ème "	...	112.5	117.8	128.0	129.1
3ème "	...	111.6	121.2	129.0	
4ème "	105.8	114.4	123.6	129.1	
Annee	...	111.9	119.6	127.8	

(a) Indices des prix des produits alimentaires releves sur les marches

N.B. : Indices calcules par la B C E A O a partir de ceux etablis par les Services nationaux de Statistiques sauf Abidjan

Source: BCEAO

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EXHIBIT 5

AVERAGE ANNUAL INFLATION

GDP Deflator

1980-88

Uganda	100.7
Zaire	56.1
Ghana	46.1
Somalia	38.4
Mozambique	33.6
Zambia	33.5
Tanzania	25.7
Madagascar	17.3
South Africa	13.9
Malawi	12.6
Lesotho	12.2
Zimbabwe	12.1
Nigeria	11.6
Botswana	10.0
Kenya	9.6
Mauritania	9.4
Senegal	8.1
Benin	8.0
Mauritius	7.8
Cameroon	7.0
Central African Rep.	6.7
Togo	6.1
Rwanda	4.1
Burundi	4.0
Cote d'Ivoire	3.8
Mali	3.7
NIGER	***3.6***
Chad	3.2
Burkina Faso	3.2
Ethiopia	2.1
Gabon	0.9
Congo	0.8

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 178-179.

EXHIBIT 6

COMPARATIVE WAGE RATES

Prevailing Wages Per Hour*
(US$)

Country	Hourly Rate
Kenya	0.26
Burundi	0.30
Ethiopia	0.31
Togo	0.59
Mauritius	0.70
Niger**	0.71

* Includes median wage rate and fringe benefit ratio.

** Includes SMIG, "complement temporaire" of 18 percent, social security of 17 percent, and one month's paid vacation.

Source: Data compiled by The Services Group from various sources.

EXHIBIT 7

PERCENTAGE OF AFRICAN CHILDREN ENROLLED IN PRIMARY SCHOOL EDUCATION 1987

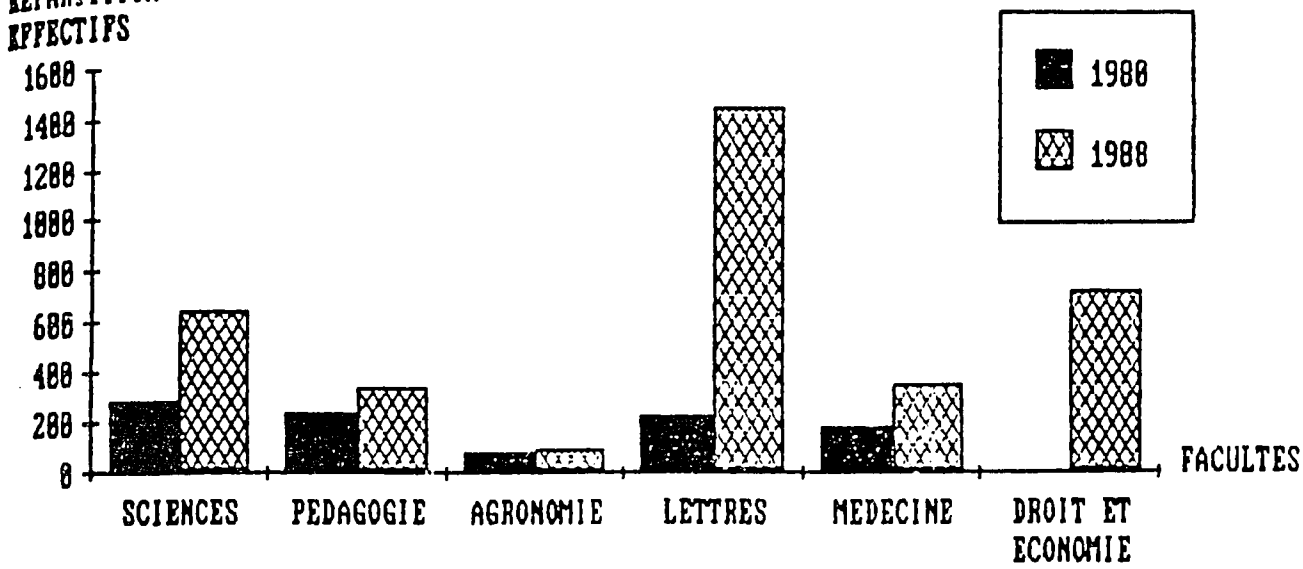
LOW-/MIDDLE-INCOME ECONOMIES	TOTAL
Cameroon	109
Mauritius	106
Togo	101
Kenya	96
Nigeria	77
Ghana	71
Ivory Coast	70
Uganda	70
Papua New Guinea	70
Burundi	67
Rwanda	67
Malawi	66
Central African Republic	66
Benin	63
Senegal	60
Mauritania	52
Chad	51
Liberia	35
Burkina Faso	32
NIGER	**29**
Mali	23

Note: Data are estimates of children of all ages enrolled in primary school. Figures are expressed as the ratio of pupils to the population of school-age children. Gross enrollment ratios may exceed 100 percent because some pupils are younger or older than the country's standard primary school age (usually 6-11 years).

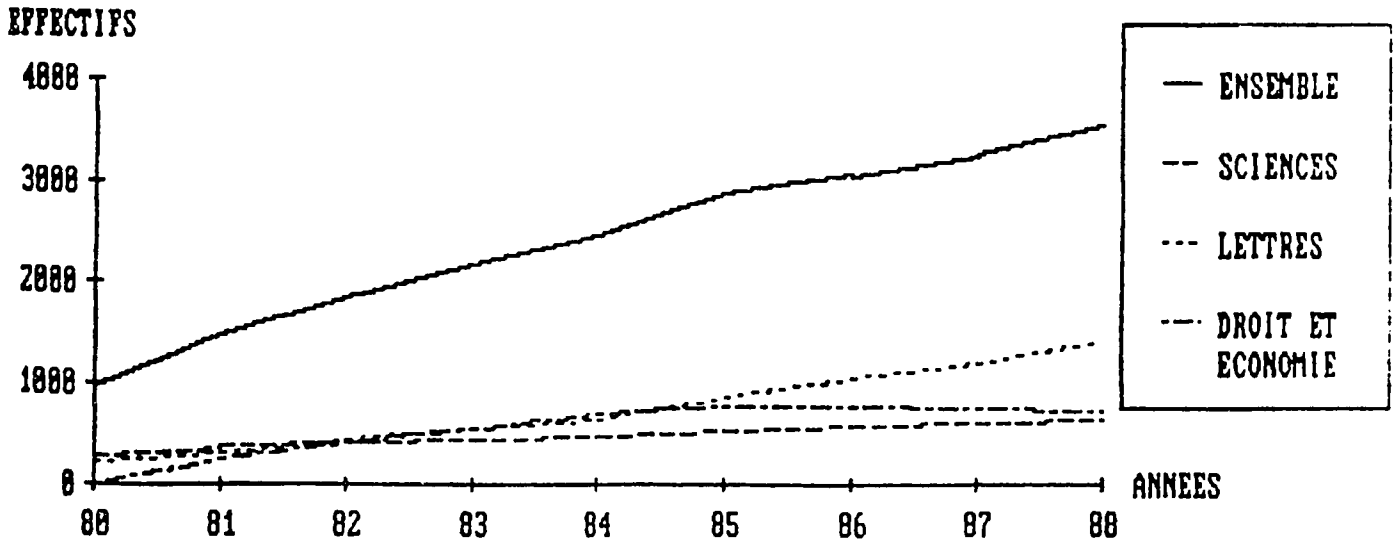
Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 234-235.

EXHIBIT 8

REPARTITION DES ETUDIANTS DE L'UNIVERSITE DE NIAMEY SELON LA FACULTE POUR LA PERIODE 1980-1988



EVOLUTION DES EFFECTIFS DES ETUDIANTS DE L'UNIVERSITE DE NIAMEY SELON LA FACULTE ET POUR L'ENSEMBLE DES FACULTES



Source: Annuaire Statistique

60

EXHIBIT 9

REGULATORY PROCEDURES AFFECTING EXPORTERS OF LIVESTOCK, HIDES, AND SKINS

A previous study of the livestock export sector identified 11 procedures governing exporters of livestock, hides, and skins.[1] These procedures can be classified into five categories, some of which are applicable to other sectors:

- authorizations,
- proofs of personal legitimacy,
- taxes and licensing fees,
- participatory contributions, and
- technical controls.

Approvals and Authorizations: Official approval or authorization is required to establish a business venture. Such approvals vary according to sector, but include cartes professionelles,[2] autorisations préalable, and accordes de titre. These are reportedly granted at the discretionary authority of either centrally appointed officials (prefets) or committees (conseil régional de développement); in the transport sector, for example, authorizing committees include representatives of competitor firms.

Proofs of Personal Legitimacy: These include police records, national identity checks, and attestations of solvency from a bank. To some extent, such checks can reduce fraud, but they also provide opportunities for corruption and arbitrary of discretionary review. Moreover, the need to establish proof of financial solvency can act as a barrier to entry because it requires participation in the formal banking system -- which is essentially moribund in Niger.

Taxes and Licensing Fees: Taxes and licensing fees are assessed at many stages of the process.

Participatory Contributions: Participatory contributions fall into two categories: paid membership to the Chambre de Commerce, and to the Conseil National des Utilisateurs des Transport (CNUT).

Chambre de Commerce. Payment of annual dues is mandatory for all businesses in Niger. The Chambre's collection of patente

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1 As documented in Kulibaba, 1991, pp. 27-36.

2 The continued use of the carte professionelle for cross-border traders is to be the subject of a GON study in 1991.

fees for new ventures and start-ups also serves as a control function, ensuring compliance. The Chambre is not a business representative organization, since membership is not voluntary, and its leadership is appointed by the government, rather than elected. Transporters are in fact represented by the Syndicat des Transporteurs, which is an independent organization whose membership is voluntary, which makes membership in the Chambre redundant.[3]

Conseil National des Utilisateurs des Transport (CNUT): As with the Chambre de Commerce, membership in CNUT is not voluntary. In both cases, membership fees essentially constitute a subsidization of both organizations.

Technical Controls: These include a variety of controls typically related to ensuring public safety or confirming the legitimacy of certain goods, and vary from sector to sector.

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[3] Kulibaba, p. 100.

EXHIBIT 10

GHANA SMALL-SCALE GOLD MINING

In 1989, the Ghanaian Government introduced a Small-Scale Gold Mining Law. The purpose of the law was twofold: to provide incentives to increase the involvement of Ghanaians in the mining sector; and to legitimize what were previously illegal small-scale mining operations and capture for the government those revenues previously lost to smuggling. By legalizing the practice, officials hoped to collect gold that previously was exported through Togo -- which has no gold mines yet exported up to US$50 million of gold per annum. Although precise production data are unavailable, officials hoped to net about 30,000 to 60,000 oz. of gold per year, and it is subsequently clear that output by small-scale miners has been an important factor in the increase of gold exports from Ghana registered in recent years.

The objective of the small-scale gold mining law was not limited to simply increasing government revenues. Through implementation of the law the government also sought to improve employment opportunities for Ghanaians, to minimize environmental damage, and to improve the efficiency of small-scale mine operations. Authorized small-scale miners were to be provided with education and training, as well as with improved implements and techniques to improve their operations. In addition, the miners also receive added incentive from the sense of security resulting from the fact that their activities are legal, and therefore free of harassment. Finally, to further maximize the economic gains from this sector, the monopoly on the purchase of gold was eliminated.

Sources: "Report of the Minerals Commission, 1984-1988," Accra, p. 7; and, SRI International and The Services Group, "Macroeconomic Assessment of Ghana's Economic Recovery Program and Its Impact on Private Sector Development," Draft Report Prepared for USAID, July 1989, p. 51.

EXHIBIT 11

ADMINISTRATIVE PROCEDURES FOR VEHICLE PURCHASE AND OPERATION

Eleven separate procedures must be complied with in order to purchase and operate a vehicle, requiring completion of as many as 17 documents. Many of these procedures are not unreasonable in and of themselves -- for example, vehicle inspections -- but the need to acquire them individually is cumbersome and time consuming, and in some cases, costly. The individual administrative procedures are:

Accorde de titre de transport. Received from the departmental Comité restreint de transport.

Autorisation d'achat. Authorization to purchase a new vehicle. Cost is 5,000 CFA francs.

Certificat de vente/légalisation. A fiscal stamp, costing 100 CFA francs, is required for the official copy of the vehicle bill of sale.

Certificat de la mise à la consommation. This is obtainable from Customs after payment of Customs duties, a fiscal stamp of 5,000 CFA, and the tourism development tax.

Procès verbal de la réception. Records the official serial numbers of the vehicle. There is no fee, although a "cadeau" is reportedly necessary of 500 to 1,000 CFA.

Immatriculation. Registration of the vehicle, with fees based on engine size.

Vignette. Registration sticker obtained from local fiscal authorities, with fee linked to vehicle size; the vignette is equivalent to 11 to 16 percent of annual official costs of vehicle operation.

Patente. The patente is assessed in accordance to the vehicle's cargo capacity. Payment of the patente dominates the annual fees and charges required to operate a vehicle, and accounts for 56 to 64 percent of all annual official costs.

Inspection technique. Safety inspection which must be completed every six months. In addition, to the inspection, operators must provide proof that insurance, patente fees, and social security contributions (for employers only) have been paid.

Insurance. Minimum liability insurance is required.

Contribution au conseil national des utilisateurs des transports (CNUT). Owners of goods vehicles must pay an

annual contribution of 30,000 CFA to CNUT.

Source: Kulibaba, 1991, pp. 29-36.

EXHIBIT 12: 1983 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	285	0	0	0
-- Agriculture	146	0	0	0
-- Livestock	122	0	0	0
-- Forestry/Fishing	17	0	0	0
Mining	2	3	52	0
Manufactur'g	34	6	3	0
-- Modern	0	6	3	0
-- Artisanal	34	0	0	0
Power/Util's	0	0	10	0
BTP	10	19	1	0
Commerce/ Rest's/Hotels	88	15	3	0
Transport/ Communicat's	14	2	10	0
Finance/Real Estate/Other Services	37	9	7	88
TOTAL GDP	470	54	86	88
AGGREGATE GDP (1)	698			
o/w INFORMAL SECTOR:	67.3%			
o/w PRIVATE SECTOR (2):	75.1%			
o/w FORMAL SECTOR (3):	32.7%			

(1) Rounding factor increases GDP by 2.2 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 13: 1984 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	229	0	0	0
-- Agriculture	141	0	0	0
-- Livestock	70	0	0	0
-- Forestry/Fishing	18	0	0	0
Mining	2	3	47	0
Manufactur'g	37	5	3	0
-- Modern	0	5	3	0
-- Artisanal	37	0	0	0
Power/Util's	0	0	11	0
BTP	13	16	1	0
Commerce/ Rest's/Hotels	92	12	7	0
Transport/ Communicat's	13	4	8	0
Finance/Real Estate/Other Services	40	5	7	92
TOTAL GDP	426	45	84	92
AGGREGATE GDP (1)	647			
o/w INFORMAL SECTOR:	65.8%			
o/w PRIVATE SECTOR (2):	72.8%			
o/w FORMAL SECTOR (3):	34.2%			

(1) Rounding factor increases GDP by 1.8 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 14: 1985 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	238	0	0	0
-- Agriculture	158	0	0	0
-- Livestock	61	0	0	0
-- Forestry/Fishing	19	0	0	0
Mining	2	3	47	0
Manufactur'g	38	5	4	0
-- Modern	0	5	4	0
-- Artisanal	38	0	0	0
Power/Util's	0	0	14	0
BTP	13	9	1	0
Commerce/ Rest's/Hotels	86	9	8	0
Transport/ Communicat's	13	7	8	0
Finance/Real Estate/Other Services	42	6	6	96
TOTAL GDP	432	39	88	96
AGGREGATE GDP (1)	655			
o/w INFORMAL SECTOR:	66.0%			
o/w PRIVATE SECTOR (2):	71.9%			
o/w FORMAL SECTOR (3):	34.0%			

(1) Rounding factor increases GDP by 2.3 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 15: 1986 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	232	0	0	0
-- Agriculture	127	0	0	0
-- Livestock	85	0	0	0
-- Forestry/Fishing	20	0	0	0
Mining	3	3	41	0
Manufactur'g	40	5	4	0
-- Modern	0	5	4	0
-- Artisanal	40	0	0	0
Power/Util's	0	0	16	0
BTP	14	12	3	0
Commerce/ Rest's/Hotels	76	9	6	0
Transport/ Communicat's	13	5	9	0
Finance/Real Estate/Other Services	47	6	5	99
TOTAL GDP	425	40	84	99
AGGREGATE GDP (1)	648			
o/w INFORMAL SECTOR:	65.6%			
o/w PRIVATE SECTOR (2):	71.8%			
o/w FORMAL SECTOR (3):	34.4%			

(1) Rounding factor increases GDP by 0.9 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 16: 1987 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	219	0	0	0
-- Agriculture	106	0	0	0
-- Livestock	93	0	0	0
-- Forestry/Fishing	20	0	0	0
Mining	3	5	42	0
Manufactur'g	46	8	3	0
-- Modern	0	8	3	0
-- Artisanal	46	0	0	0
Power/Util's	0	0	18	0
BTP	16	16	2	0
Commerce/ Rest's/Hotels	75	11	3	0
Transport/ Communicat's	13	4	11	0
Finance/Real Estate/Other Services	50	5	6	100
TOTAL GDP	422	49	85	100
AGGREGATE GDP (1)	656			
o/w INFORMAL SECTOR:	64.3%			
o/w PRIVATE SECTOR (2):	71.8%			
o/w FORMAL SECTOR (3):	35.7%			

(1) Rounding factor increases GDP by 2.6 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 17: 1988 GDP (BILLIONS FCFA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	272	0	0	0
-- Agriculture	153	0	0	0
-- Livestock	98	0	0	0
-- Forestry/Fishing	21	0	0	0
Mining	4	1	39	0
Manufactur'g	50	5	2	0
-- Modern	0	5	2	0
-- Artisanal	50	0	0	0
Power/Util's	0	0	16	0
BTP	18	5	2	0
Commerce/ Rest's/Hotels	83	7	5	0
Transport/ Communicat's	13	4	9	0
Finance/Real Estate/Other Services	56	4	5	100
TOTAL GDP	496	26	78	100
AGGREGATE GDP (1)	700			
o/w INFORMAL SECTOR:	70.9%			
o/w PRIVATE SECTOR (2):	74.6%			
o/w FORMAL SECTOR (3):	29.1%			

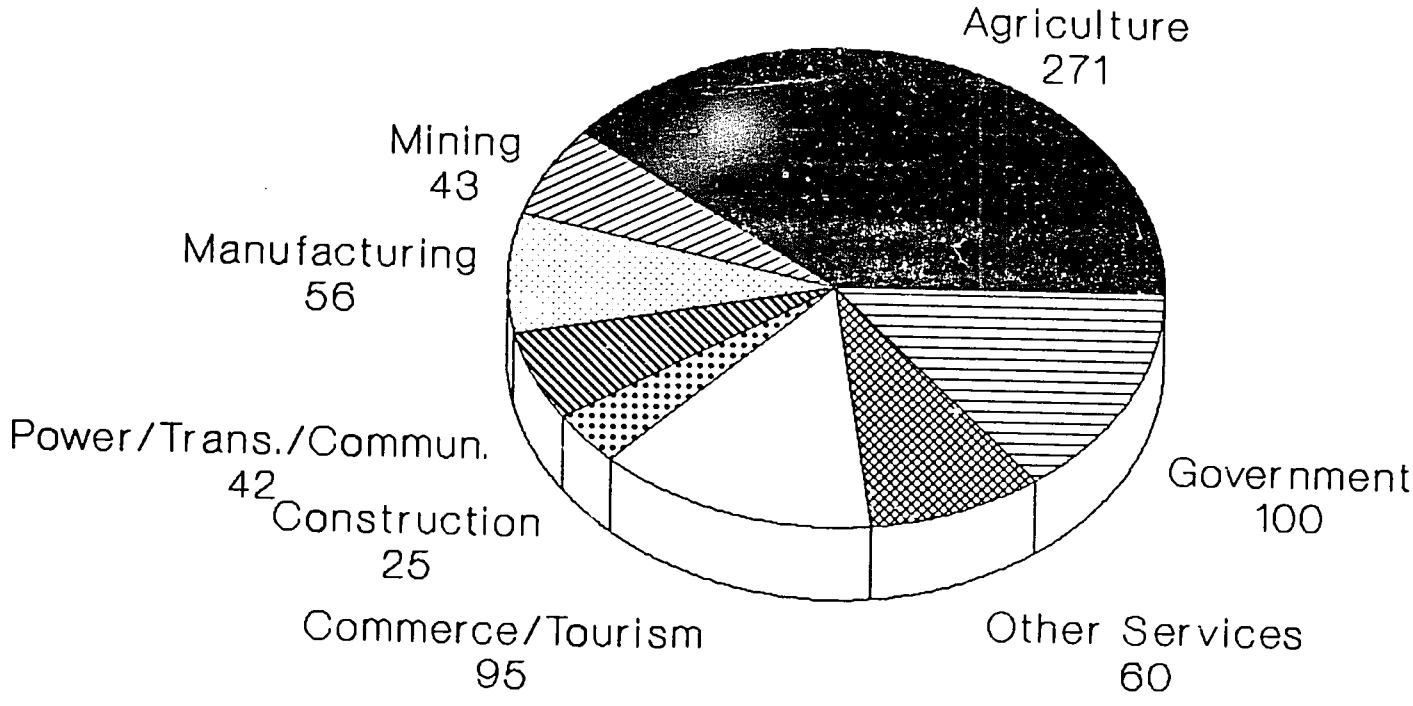
(1) Rounding factor increases GDP by 4.0 billion

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

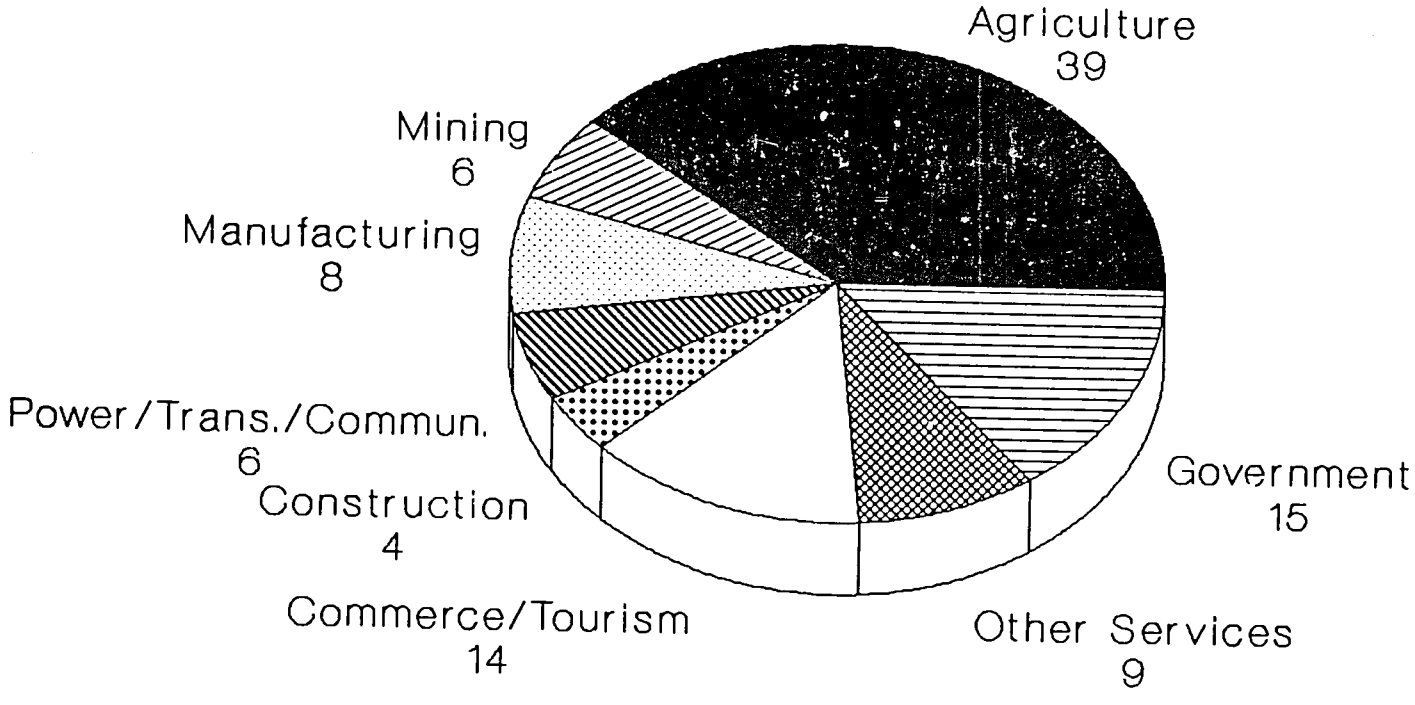
SOURCE: Annuaire Statistique, 1989 (pp. 215, 218)

EXHIBIT 18
1988 GDP BY SECTOR (billions FCFA)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 19
1988 GDP BY SECTOR (%)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 20

GROSS DOMESTIC PRODUCT
Millions Of Current Dollars

1965	
South Africa	10,540
Nigeria	5,850
Zaire	3,140
Ghana	2,050
Sudan	1,330
Ethiopia	1,180
Uganda	1,100
Zambia	1,060
Zimbabwe	960
Kenya	920
Senegal	810
Cameroon	810
Tanzania	790
Cote d'Ivoire	760
Madagascar	670
NIGER	***670***
Guinea	520
Sierra Leone	320
Chad	290
Liberia	270
Mali	260
Burkina Faso	260
Gabon	230
Benin	220
Somalia	220
Malawi	220
Congo	200
Togo	190
Mauritius	190
Mauritania	160
Burundi	150
Rwanda	150
Central African Rep.	140
Botswana	50
Lesotho	50

1988	
Mozambique	1,100
Ethiopia	4,950
Chad	920
Tanzania	2,740
Malawi	1,080
Somalia	970
Zaire	6,470
Madagascar	1,880
Burkina Faso	1,750
Mali	1,940
Burundi	960
Uganda	3,950
Nigeria	29,370
Zambia	4,000
NIGER	***2,400***
Rwanda	2,310
Kenya	7,380
Togo	1,360
Central African Rep.	1,080
Benin	1,710
Ghana	5,230
Lesotho	330
Guinea	2,540
Mauritania	900
Sierra Leone	1,270
Senegal	4,980
Zimbabwe	5,650
Cote d'Ivoire	7,650
Congo	2,150
Botswana	1,940
Cameroon	12,900
Mauritius	1,600
South Africa	78,970
Gabon	3,320

Note: Includes only countries for which data are available from the source indicated. Page totals calculated by readers may not reflect totals for the region because of data omissions by reporting countries. This note will not be repeated, but is generally applicable.

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 182-183.

EXHIBIT 21

GROWTH OF GROSS DOMESTIC PRODUCT

Average Annual Growth Rate
(Percent)

	1980-88
Botswana	11.4
Mauritius	5.7
Burkina Faso	5.5
Cameroon	5.4
Burundi	4.3
Kenya	4.2
Congo	4.0
Chad	3.9
Senegal	3.3
Somalia	3.2
Mali	3.2
Lesotho	2.9
Zimbabwe	2.7
Malawi	2.6
Benin	2.4
Cote d'Ivoire	2.2
Rwanda	2.1
Central African Rep.	2.1
Ghana	2.1
Tanzania	2.0
Zaire	1.9
Mauritania	1.6
Ethiopia	1.4
Uganda	1.4
South Africa	1.3
Zambia	0.7
Madagascar	0.6
Togo	0.5
Sierra Leone	0.2
Gabon	-0.2
Nigeria	-1.1
NIGER	***-1.2***
Mozambique	-2.8

Note: Growth rates based on GDP constant 1988 dollars.

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 180-181.

EXHIBIT 22

GROSS NATIONAL PRODUCT PER CAPITA

Dollars

1988

Mozambique	100
Ethiopia	120
Chad	160
Tanzania	160
Malawi	170
Somalia	170
Zaire	170
Madagascar	190
Burkina Faso	210
Mali	230
Burundi	240
Uganda	180
Nigeria	290
Zambia	290
NIGER	***300***
Rwanda	320
Kenya	370
Togo	370
Central African Rep.	380
Benin	390
Ghana	400
Lesotho	420
Mauritania	480
Senegal	650
Zimbabwe	650
Cote d'Ivoire	770
Congo	910
Botswana	1010
Cameroon	1010
Mauritius	1800
South Africa	2290
Gabon	2970

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 178-179.

EXHIBIT 23

GROWTH RATE OF GNP PER CAPITA

Average Annual Growth Rate
Percent

	1965-88
Botswana	8.6
Lesotho	5.2
Cameroon	3.7
Congo	3.5
Burundi	3.0
Mauritius	2.9
Kenya	1.9
Mali	1.6
Rwanda	1.5
Burkina Faso	1.2
Malawi	1.1
Zimbabwe	1.0
Nigeria	0.9
Cote d'Ivoire	0.9
Gabon	0.9
South Africa	0.8
Somalia	0.5
Benin	0.1
Togo	0.0
Ethiopia	-0.1
Mauritania	-0.4
Tanzania	-0.5
Central African Rep.	-0.5
Senegal	-0.8
Ghana	-1.6
Madagascar	-1.8
Chad	-2.0
Zaire	-2.1
Zambia	-2.1
NIGER	***-2.3***
Uganda	-3.1

Note: Growth rates based on GNP constant 1988 dollar measures.

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 178-79.

EXHIBIT 24: EMPLOYMENT (1988 DATA)

ECONOMIC SECTOR	INFORMAL SECTOR	FORMAL PRIVATE	PARASTATAL	GOVERNMENT
Rural	1789727	2222	0	1501
Mining	1425	870	3294	161
Manufactur'g	60378	2005	1015	292
Power/Util's	0	498	1287	1129
BTP	9696	2784	1323	627
Commerce/ Rest's/Hotels	204954	1479	1735	202
Transport/ Communicat's	10671	1180	1800	2083
Finance/Real Estate/Other Services	179136	3986	496	18708
TOTAL EMPLOYED	2255987	15024	10950	24703
AGGREGATE TOTAL (1)	2306664			
o/w INFORMAL SECTOR:	97.8%			
o/w PRIVATE SECTOR (2):	98.5%			
o/w FORMAL SECTOR (3):	2.2%			

(1) Total employed estimate is 514 higher than Recensement estimate

(2) Private sector defined as informal sector plus formal private sector.

(3) Formal sector defined as formal private, parastatal and Government

METHODOLOGY: (1) Employment figures taken from the Annuaire Statistique; (2) Parastatal and formal private sector employment figures taken from the Annuaire, SPEIN, and SCIMPEX; (3) Total from Recensement minus formal sector yields informal sector numbers

SOURCES: Recensement Generale de la Population (1988), pp. 77–79
Annuaire Statistique (1989), pp. 81, 83, 85, 87
SPEIN
SCIMPEX

EXHIBIT 25: NATIONAL CENSUS EMPLOYMENT DATA (1988)

INFORMAL:	TOTAL	MALE	FEMALE
Independent	1165590	974970	190620
Family Labor	984730	731580	253150
Jobbers	19550	15540	4010
Apprentices	10090	9230	860
Employers	5290	4670	620
Other	32360	21030	11330
TOTAL INFORMAL	2217610	1757020	460590
FORMAL:	TOTAL	MALE	FEMALE
Public Sector	42840	35470	7370
Parastatal	17800	16180	1620
Private	27900	23490	4410
TOTAL FORMAL	88540	75140	13400
TOTAL EMPLOYED	2306150	1832160	473990
o/w INFORMAL SECTOR:	96.2%		
-- Male	76.2%		
-- Female	20.0%		
o/w PRIVATE SECTOR (1):	97.4%		
-- Male	77.2%		
-- Female	20.2%		
o/w FORMAL SECTOR:	3.8%		
-- Male	3.3%		
-- Female	0.6%		

(1) Private Sector includes informal sector plus formal private sector (1.2% of total employment)

SOURCE: Recensement Generale de la Population (1988), pp. 94-95

EXHIBIT 26: EMPLOYMENT BY GENDER IN NIGER (1988 DATA)

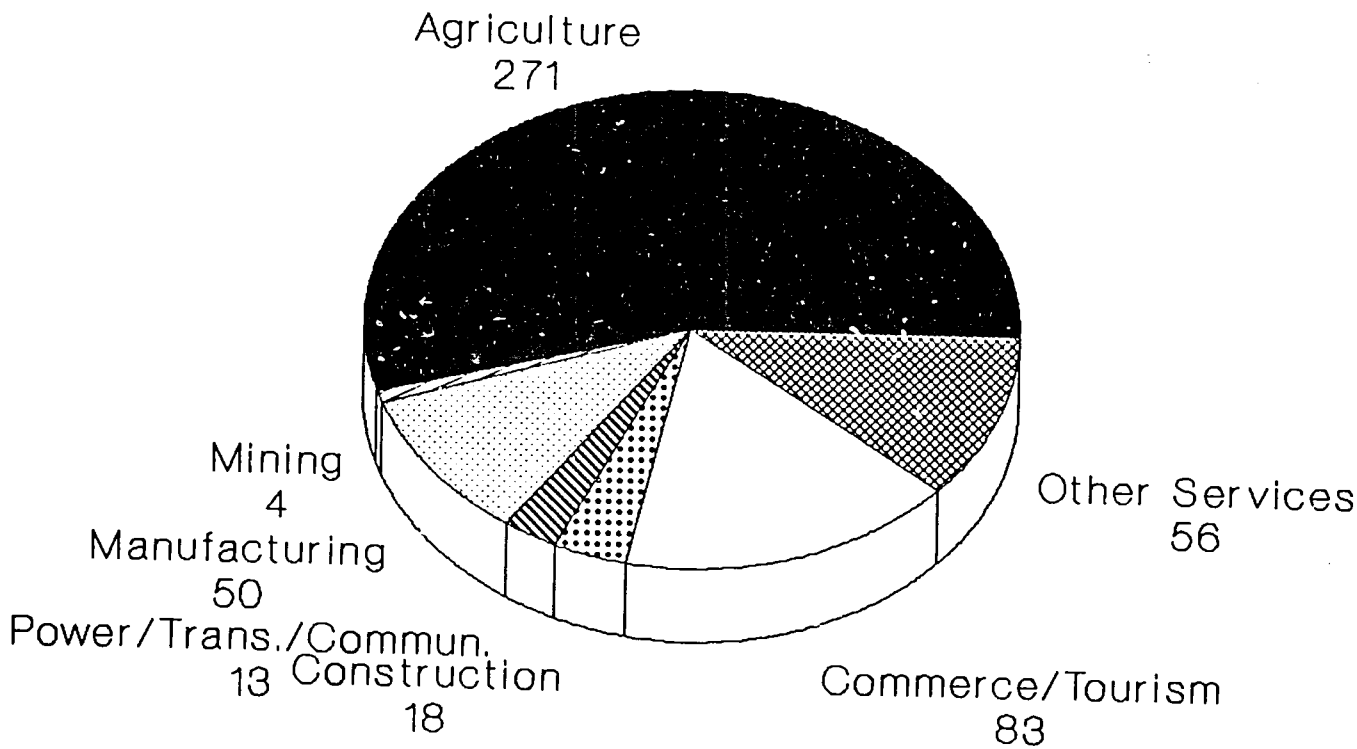
GENDER	PRIVATE	PARASTATAL	GOVERNMENT	TOTAL
Male	1805060	9137	18477	1832674
Female	465951	1813	6226	473990
TOTAL	2271011	10950	24703	2306664

GENDER	POPULATION	EMPLOYED	% EMPLOYED
Male	3590070	1832674	51.0%
Female	3658030	473990	13.0%
TOTAL	7248100	2306664	31.8%

NOTE: Total employed estimated at 514 higher than Recensement

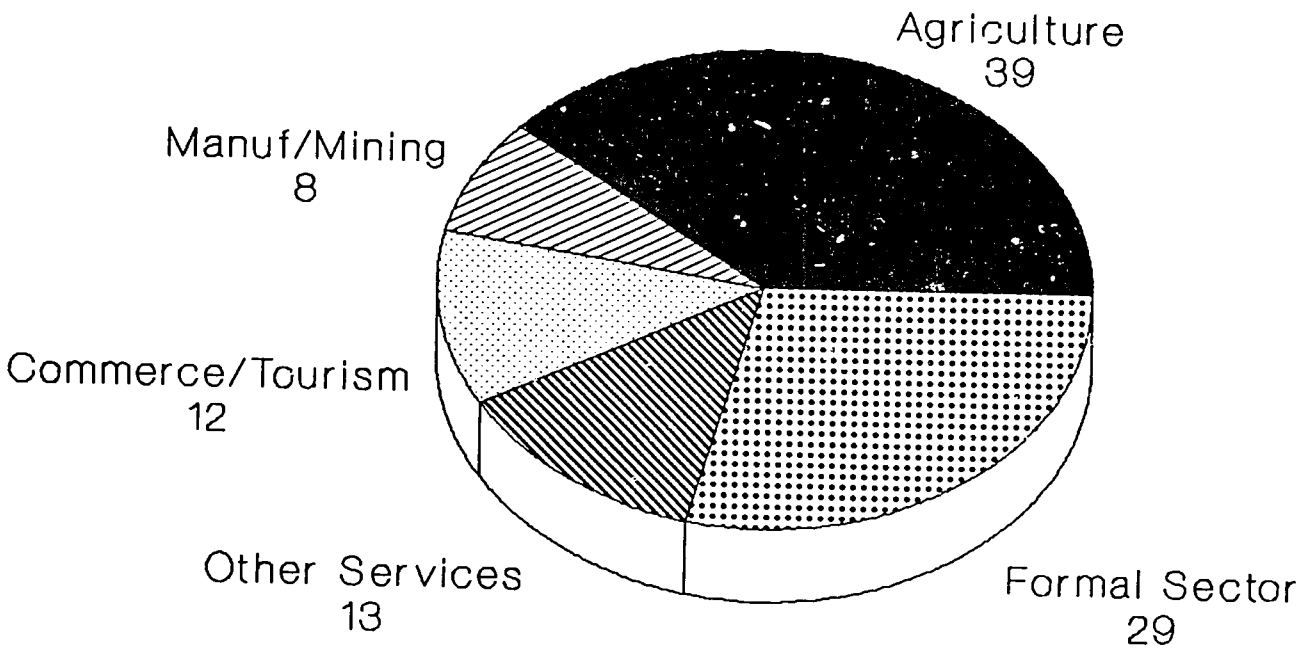
SOURCES: Annuaire Statistique, 1989 (p. 85)
Recensement Generale de la Population, 1988 (p. 77)

EXHIBIT 27
1988 INFORMAL GDP (billions FCFA)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 28
1988 INFORMAL GDP TO TOTAL (%)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 29

NONFARM ENTERPRISE DENSITY
(number of enterprises per 1,000 population)

A. MSU Survey Results

	Large towns	Small towns	Z.D.s
Manufacturing	23.6	35.7	65.0
Commerce	27.7	30.9	18.5
Services	24.1	25.3	26.0
Total	75.4	91.9	109.5

Source: survey results.

B. Ministry of Plan Data

	Niamey	Other towns	Rural
Manufacturing	13.9	9.6	10.5
Commerce	47.2	17.2	4.1
Services	14.6	7.0	2.1
Total	75.7	33.8	16.7

Source: République du Niger, Ministère du Plan, Direction de la Statistique et de la Démographie, Service des enquêtes, *Enquête Nationale sur le Secteur Informel et la Petite Entreprise: Présentation métholologique*. Xavier Oudin, ORSTOM, Niamey, Juillet 1989, page 7. Note that in these data, "other towns" are locations with 10,000 or more inhabitants; all smaller towns are considered as rural.

EXHIBIT 30

DENSITY AND COMPOSITION OF TOTAL EMPLOYMENT IN NONFARM ACTIVITIES IN TWO DEPARTMENTS OF NIGER, 1989

(full plus part-time employment per 1,000 population)

	Large Towns		Small Towns		Zones de Den.	
	Dosso	Maradi	Dosso	Maradi	Dosso	Maradi
1. Manufacturing						
salt mining	0	0	2.8	1.2	25.5	0
abattoirs etc.	5.3	3.5	3.0	2.6	4.6	4.7
milk and dairy	3.8	1.2	2.1	.2	0	.4
fruit & veg. proc.	.5	.5	.4	.1	.2	.1
groundnut proc.	9.0	2.3	13.8	.8	2.3	4.6
grain mills	2.7	2.5	2.0	1.6	0	.9
bakery	11.0	.7	9.7	.4	6.1	.2
condiments	11.3	6.9	16.4	4.4	11.3	2.4
Subtotal: food	43.6	17.6	50.2	11.3	50.0	13.3
garments	7.7	7.7	5.4	3.8	1.2	4.3
leather/shoes	.8	1.2	2.1	5.3	.2	.2
wood products	2.3	2.9	1.3	.7	1.3	.8
mats	1.9	1.1	7.2	3.0	113.7	5.2
ceramics	6.8	2.0	1.0	1.9	0.5	0.8
metal prods.	4.8	2.6	2.3	4.3	4.2	5.0
other	.6	1.8	1.6	1.7	2.0	1.1
Total	68.5	36.9	71.1	32.0	173.1	30.7
2. Commerce						
wholesaling	4.5	1.9	1.7	0	0	0.2
groceries	1.0	.1	0.7	0.3	0.2	0.2
gen. retailing	10.4	7.9	11.1	4.7	2.7	1.6
vending	24.1	29.8	35.0	32.0	20.4	26.0
specialty ret.	2.5	4.9	1.0	2.7	0.4	0.6
Total	42.5	44.6	49.5	39.7	23.7	28.6
3. Services						
repairs	10.0	8.2	3.4	1.5	1.9	1.7
bar,rest,hotel	1.7	1.4	1.1	0.8	0.1	0.5
food catering	22.0	23.6	32.0	15.0	7.6	32.3
hairdressing	1.7	1.3	1.2	1.2	3.4	4.0
trad. doctors	1.3	1.4	1.1	1.3	2.7	6.2
transport	5.2	2.7	4.2	1.0	1.9	1.8
other	6.2	3.7	4.2	3.0	2.2	6.7
Total	48.1	42.3	47.2	23.8	19.8	53.2
4. Total nonfarm (1+2+3)	159.1	123.8	167.8	95.5	216.6	112.5

Source: GEMINI

Tableau Série: 6, N°: 2.

EXHIBIT 31

SYNTHESE DES RESULTATS FINAUX

CARACTERISTIQUES DU SECTEUR INFORMEL

SELON LA ZONE D'ACTIVITE ET LA TAILLE DE L'ETABLISSEMENT

Unité: Nombre d'individus, d'établissements, [va] et [va/actif] = Milliers FCFA, [VALEUR AJOUTEE] = Millions FCFA

		DONNEES DES ETABLISSEMENTS INFORMELS AU SENS STRICT y compris les activités non prises en compte par l'enquête (orpailleurs, recupération, services-domestiques); et les arbitages et corrections effectués									ACTIVITES DES MENAGES abattage d'animaux domestiques et location de logement		TOTAL= DONNEES COMPTABILITE établissements informel plus les activités des	
		DONNEES MOYENNES PAR ETABLISSEMENT ET RATIOS			ACTIFS (1)		ETABLISSEMENTS		VALEUR AJOUTEE		VALEUR AJOUTEE		VALEUR AJOUTEE	
ONE	ET TAILLE	Actifs	va	va/actif	Nombre	Structure	Nombre	Structure	Montant	Structure	Montant	Structure	Montant	Structure
ale	Petits établissements	1,3	582	449	269.810	69,3	208.272	71,3	121.211	62,1	1.076	6,2	122.287	57,5
	Grands établissements	3,1	10.347	3.369	1.167	0,3	380	0,1	3.932	2,0	0	0,0	3.932	1,8
	Ensemble des établissements Ruraux	1,3	600	462	270.977	69,6	208.652	71,4	125.143	64,1	1.076	6,2	126.219	59,4
aine	Petits établissements	1,3	522	390	109.768	28,2	82.087	28,1	42.861	22,0	16.370	93,8	59.231	27,9
	Grands établissements	6,3	19.288	3.075	8.812	2,3	1.405	0,5	27.099	13,9	0	0,0	27.099	12,7
	Ensemble des établissements Urbains	1,4	838	590	118.580	30,4	83.492	28,6	69.960	35,9	16.370	93,8	86.330	40,6
TOTAL HORS AGRICULTURE		1,3	668	501	389.557	100	292.144	100	195.103	100	17.446	100	212.549	100

rce: Comptabilité Nationale/ DSD/ MP

: Y compris le chef de l'établissement

EXHIBIT 32

Tableau Série: 5, N°: 0.

ENQUETE SECTEUR INFORMEL 87/88

COMPTES DE L'ENSEMBLE DES ETABLISSEMENTS

SELON LA ZONE, LA TAILLE ET LE TYPE D'ACTIVITE DE L'ETABLISSEMENT

Unité: Millions FCFA, sauf [Actifs]= Unité.

Date: 15/11/90

ZONE	ET ACTIVITE	(1) Actifs = Effectif	Production	Valeur Ajoutee (VA)	Impôts liés à la production (patente, taxes.)	Excédent Brut d'exploitation	(2)Formation Brute de Capital Fixe
Rurale	petits établissements commerciaux	92.996	74.618	67.512	3.692	63.638	0
	autres petits établissements	166.314	75.576	49.883	1.474	45.339	175
	Ensemble des petits établissements Ruraux	259.310	150.194	117.395	5.166	108.977	175
	grands établissements commerciaux	795	3.819	3.533	63	3.438	0
	autres grands établissements	372	583	399	0	306	0
	Ensemble des grands établissements Ruraux	1.167	4.402	3.932	63	3.744	0
	Ensemble des établissements Ruraux	260.477	154.596	121.327	5.229	112.721	175
Urbaine	petits établissements commerciaux	37.739	22.074	20.061	1.443	18.068	1
	autres petits établissements	51.029	45.522	25.602	2.564	19.512	111
	Ensemble des petits établissements Urbains	88.768	67.596	45.663	4.007	37.580	112
	grands établissements commerciaux	623	8.935	8.289	125	8.121	0
	autres grands établissements	8.189	31.529	18.810	2.204	11.956	154
	Ensemble des grands établissements Urbains	8.812	40.464	27.099	2.329	20.077	154
	Ensemble des établissements Urbains	97.580	108.060	72.762	6.336	57.657	266
TOTAL HORS AGRICULTURE		358.057	262.656	194.089	11.565	170.378	441

Source: Comptabilité Nationale/ DSD/ MP

(1): Effectif y compris le chef de l'établissement (2):Formation [illegible]

EXHIBIT 33

ie: 2, N°: 1

RECENSEMENT DE LA POPULATION

1 9 8 8
(exploitation au dixième)

NOMBRE D'ACTIFS

SELON LE STATUT DANS L'EMPLOIS ET LA BRANCHE D'ACTIVITE
(Partage entre les secteurs public, moderne, et informel.)

e d'individus, ou d'établissements

DATE: 15/11/90

VS L'EMPLOI / VITE	EMPLOYEURS			INDEPENDANTS et TACHERONS	SALARIES				AIDE FAMILIAL	APPRENTIS	TOTAL GENERAL	EMPLOYE INFORMEL (salariés+ aides+ apprentis)	ETABLISSEMENTS DE INFORMEL (employeur+ independents)
abilité Nationale	moderne	informel	TOTAL	informel	public	moderne	informel	TOTAL	informel	informel			
	0	2.741	2.741	922.317	1.395	0	2.528	3.923	924.391	389	1.853.761	927.308	925.058
ies Manufacturières	45	354	399	54.845	1.612	13.076	1.653	16.341	19.507	1.951	93.043	23.111	55.199
:, Travaux Publics	13	182	195	48.034	543	8.969	-461	9.051	19.155	1.667	78.102	20.361	48.216
	32	172	204	6.811	1.069	4.107	2.114	7.290	352	284	14.941	2.750	6.983
TAURATION	74	648	722	158.308	364	3.214	1.160	4.738	46.033	593	210.395	47.786	158.956
rts	40	1.388	1.426	67.262	39.469	7.462	16.607	63.538	9.417	7.307	148.952	33.331	68.650
services	10	270	280	5.820	789	2.980	2.688	6.457	854	2.000	15.410	5.542	6.090
	30	1.119	1.149	61.442	36.680	4.482	13.919	57.081	8.563	5.307	133.542	27.789	62.561
	159	5.131	5.290	1.202.732	42.840	23.752	21.948	88.540	999.348	10.240	2.306.150	1.031.536	1.207.863
CULTURE	159	2.390	2.549	280.415	41.445	23.752	19.420	84.617	74.957	9.851	452.389	104.228	282.805

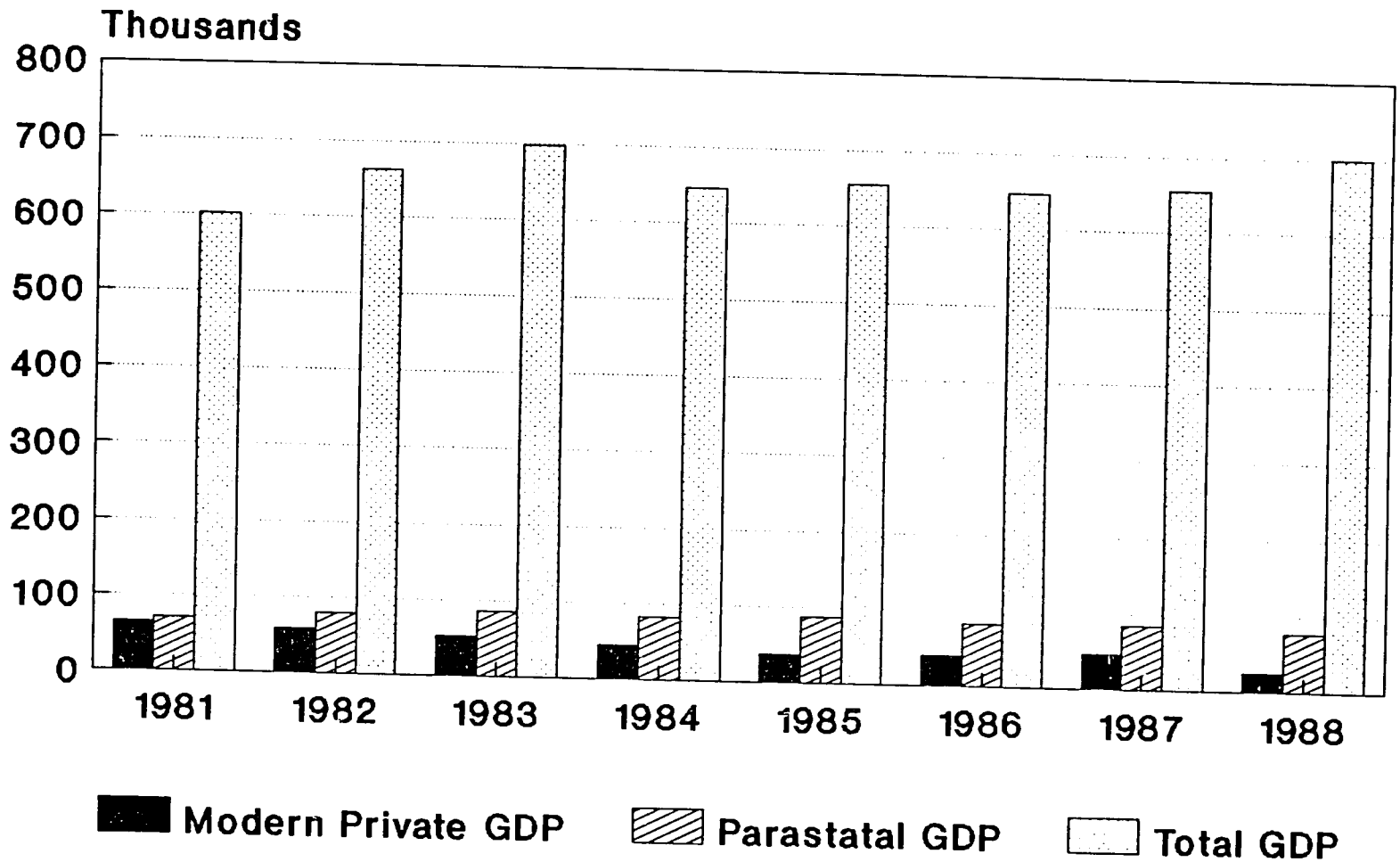
ment BB/ BCR/ ; et Comptabilité Nationale/ DSD/ MF

donne les colonnes et les lignes total, les activités mal désignées étant réparties proportionnellement.
e les secteurs (public, moderne, et informel) est fait par la comptabilité nationale.
u public et du secteur moderne sont connus, le secteur informel est obtenu par solde.

27

EXHIBIT 34

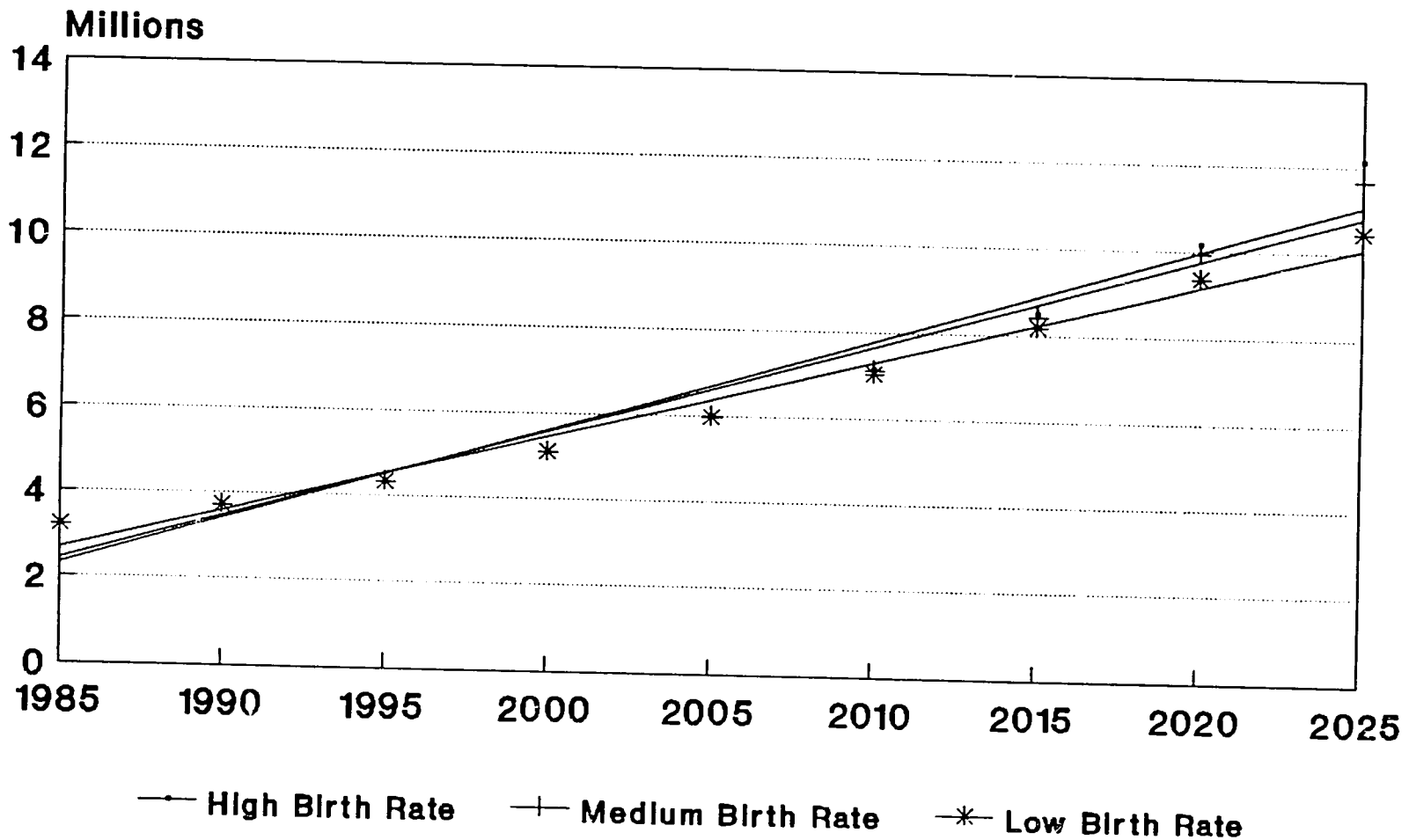
MODERN PRIVATE GDP:1981-1988 (mil. FCFA)



Source: Ann Stat, Comptabilite Nat'le

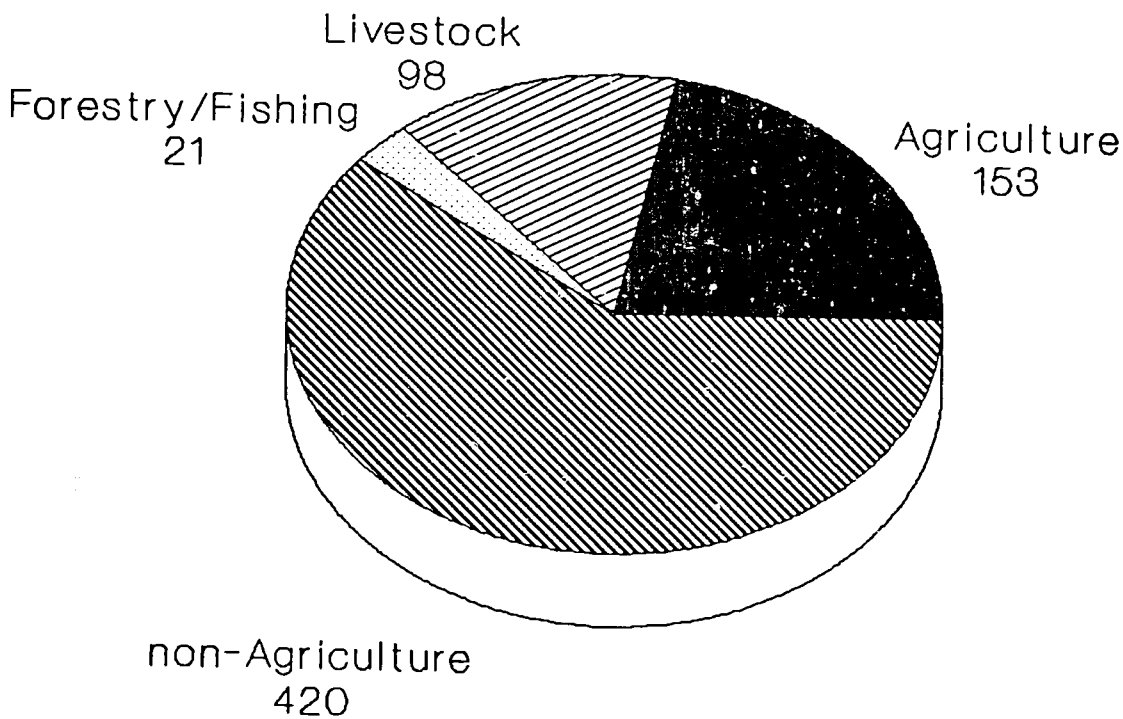
EXHIBIT 35

ECONOMICALLY ACTIVE POPUL.:1985-2025



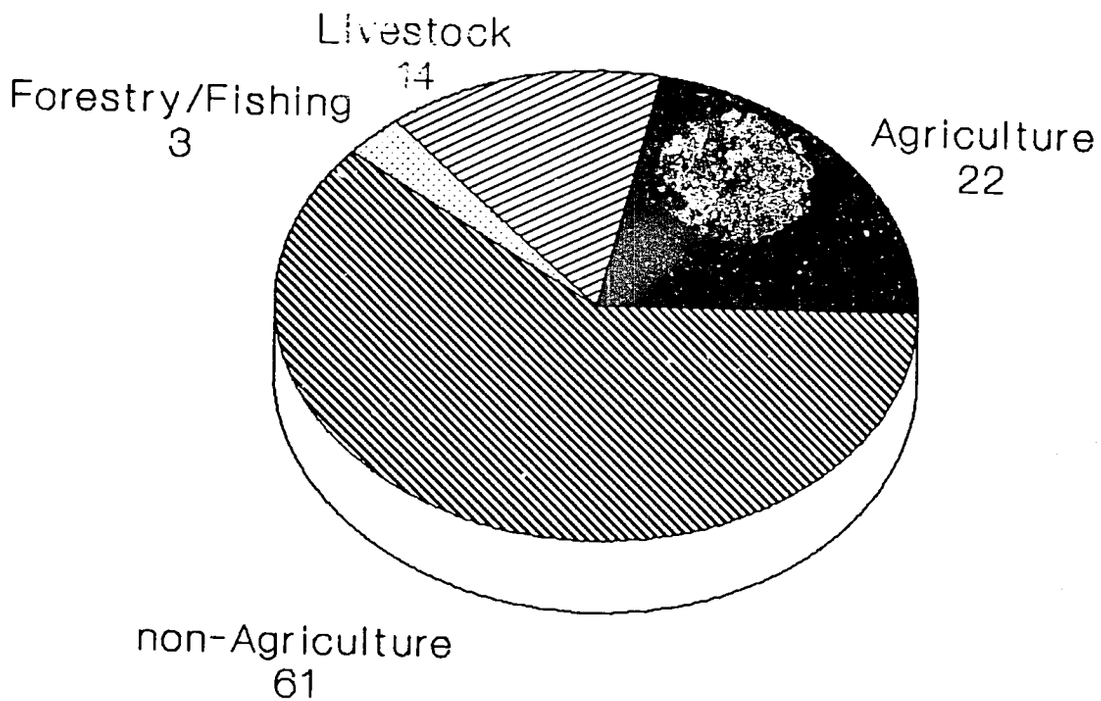
Source: Annuaire Statistique

EXHIBIT 36
AGRICULTURAL GDP (billions of FCFA)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 37
1988 AGRICULTURAL SUB-SECTOR GDP (%)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 38

AGRICULTURE AS A SHARE OF GDP

Percent

	1965	1988
Mozambique	NA	62
Burundi	NA	56
Rwanda	75	38
Somalia	71	65
NIGER	***68***	***36***
Mali	65	49
Lesotho	65	21
Benin	59	40
Ethiopia	58	42
Nigeria	54	34
Burkina Faso	53	39
Uganda	52	72
Malawi	50	37
Cote d'Ivoire	47	36
Tanzania	46	66
Central African Rep.	46	44
Togo	45	34
Ghana	44	49
Chad	42	47
Kenya	35	31
Sierra Leone	34	46
Botswana	34	3
Cameroon	33	26
Mauritania	32	38
Madagascar	31	41
Gabon	26	11
Senegal	25	22
Zaire	21	31
Congo	19	15
Zimbabwe	18	11
Mauritius	16	13
Zambia	14	14
South Africa	10	6

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 182-183.

EXHIBIT 39

GROWTH OF AGRICULTURE

Percent

	1980-88
Burkina Faso	6.4
Togo	4.2
Benin	4.2
Zambia	4.1
Tanzania	4.0
Mauritius	4.0
Somalia	3.9
Kenya	3.3
Zaire	3.2
Senegal	3.2
Burundi	3.1
NIGER	***2.8***
Malawi	2.7
Chad	2.6
Central African Rep.	2.6
Zimbabwe	2.5
Cameroon	2.4
Madagascar	2.2
Sierra Leone	2.2
Congo	2.0
Lesotho	1.8
South Africa	1.7
Cote d'Ivoire	1.6
Mauritania	1.5
Nigeria	1.0
Ghana	0.5
Mali	0.3
Uganda	0.3
Rwanda	0.3
Mozambique	-0.8
Ethipia	-1.1
Botswana	-5.9

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 180-181.

EXHIBIT 40

VALUE ADDED IN AGRICULTURE

Millions Of Current Dollars

1970		1988	
Nigeria	5080	Nigeria	10105
South Africa	1362	South Africa	4624
Ghana	1030	Cameroon	3405
Ethiopia	931	Uganda	2859
Uganda	929	Cote d'Ivoire	2728
Sudan	757	Ghana	2577
Zaire	585	Kenya	2265
Kenya	484	Ethiopia	2090
Tanzania	473	Zaire	2008
Cote d'Ivoire	462	Tanzania	1795
NIGER	***420***	Senegal	1100
Cameroon	364	Mali	952
Madagascar	266	Rwanda	880
Zimbabwe	214	***NIGER***	***866***
Senegal	208	Madagascar	775
Mali	207	Burkina Faso	685
Zambia	191	Benin	680
Somalia	167	Mozambique	679
Burundi	159	Somalia	636
Chad	142	Zimbabwe	615
Rwanda	136	Sierra Leone	581
Burkina Faso	126	Zambia	568
Benin	121	Burundi	535
Malawi	119	Central African Rep.	469
Sierra Leone	108	Togo	464
Liberia	91	Chad	430
Togo	85	Malawi	402
Central African Rep.	60	Gabon	375
Gabon	60	Mauritania	339
Mauritania	58	Mauritius	211
Congo	49	Lesotho	67
Mauritius	30	Botswana	57
Botswana	28		
Lesotho	23		

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 184-85.

EXHIBIT 41

URBANIZATION

	Urban Poulation as % of Total Population	Avg. Annual % Growth of Urban Population	% of Urban Population in Largest City
	1988	1980 - 88	1980
South Africa	58	3.4	13
Zambia	54	6.7	35
Cameroon	47	7.2	21
Cote d'Ivoire	45	6.6	34
Central African Rep.	45	4.9	36
Gabon	44	6.7	--
Mauritius	42	0.8	--
Congo	41	4.8	56
Benin	40	7.8	63
Mauritania	40	7.8	39
Zaire	39	4.6	28
Senegal	38	4.0	65
Somalia	37	5.6	34
Nigeria	34	6.3	17
Ghana	33	4.2	35
Chad	31	7.4	39
Tanzania	30	11.6	50
Zimbabwe	27	6.2	50
Sierra Leone	26	5.0	47
Togo	25	7.0	60
Mozambique	24	11.0	83
Madagascar	24	5.9	36
Botswana	22	8.4	--
Kenya	22	8.2	57
Lesotho	19	7.2	--
Mali	19	3.5	24
NIGER	***18***	***8.0***	***31***
Malawi	14	7.9	19
Ethiopia	13	5.2	37
Uganda	10	4.1	52
Burkina Faso	9	5.4	41
Burundi	7	9.5	--
Rwanda	7	8.2	--

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 238-239.

EXHIBIT 42

Tableau no 4.04: Trois scénarios de croissance de la population par zone de résidence pour 1977-2010.

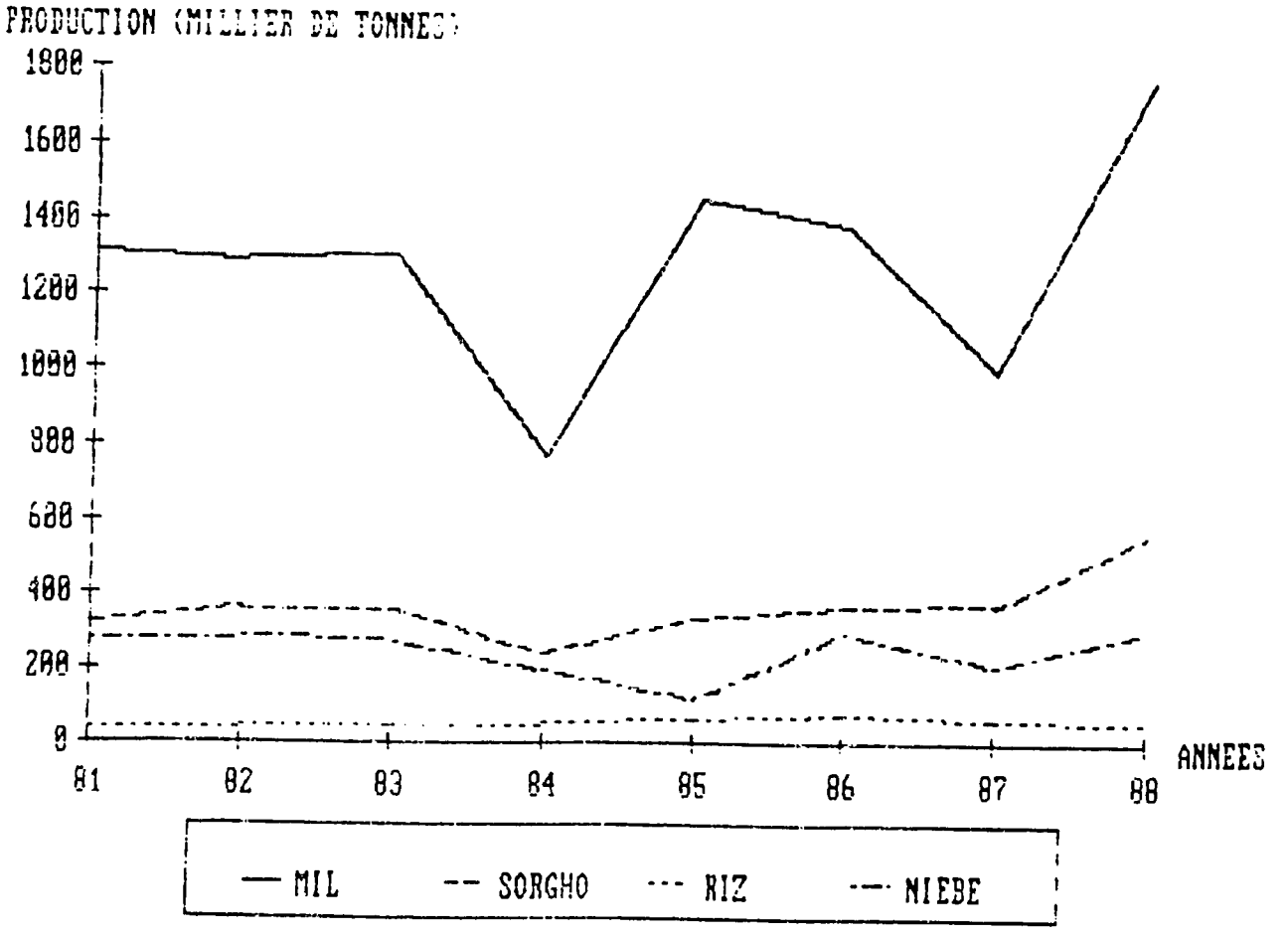
(en milliers)

Scénarios	Fécondité élevée		Fécondité moyenne		Fécondité basse		%
	Population		Population		Population		de
Année	Urbaine	Rurale	Urbaine	Rurale	Urbaine	Rurale	citadins
1977	656	4.447	656	4.447	656	4.447	13
1985	1.039	5.374	1.039	5.374	1.039	5.374	16
1990	1.453	6.000	1.453	6.000	1.448	5.978	19
1995	2.022	6.714	2.016	6.694	1.995	6.622	23
2000	2.761	7.543	2.736	7.473	2.665	7.279	27
2005	3.727	8.454	3.655	8.290	3.457	7.841	31
2010	4.957	9.453	4.774	9.103	4.330	8.257	34

Source: U.E.D.D. Groupe Ressources Humaines / Préparation du Plan.

EXHIBIT 43

EVOLUTION DE LA PRODUCTION DE CULTURES VIVRIERES DE 1981 A 1988



EVOLUTION DE LA PRODUCTION DE CULTURES INDUSTRIELLES DE 1981 A 1988

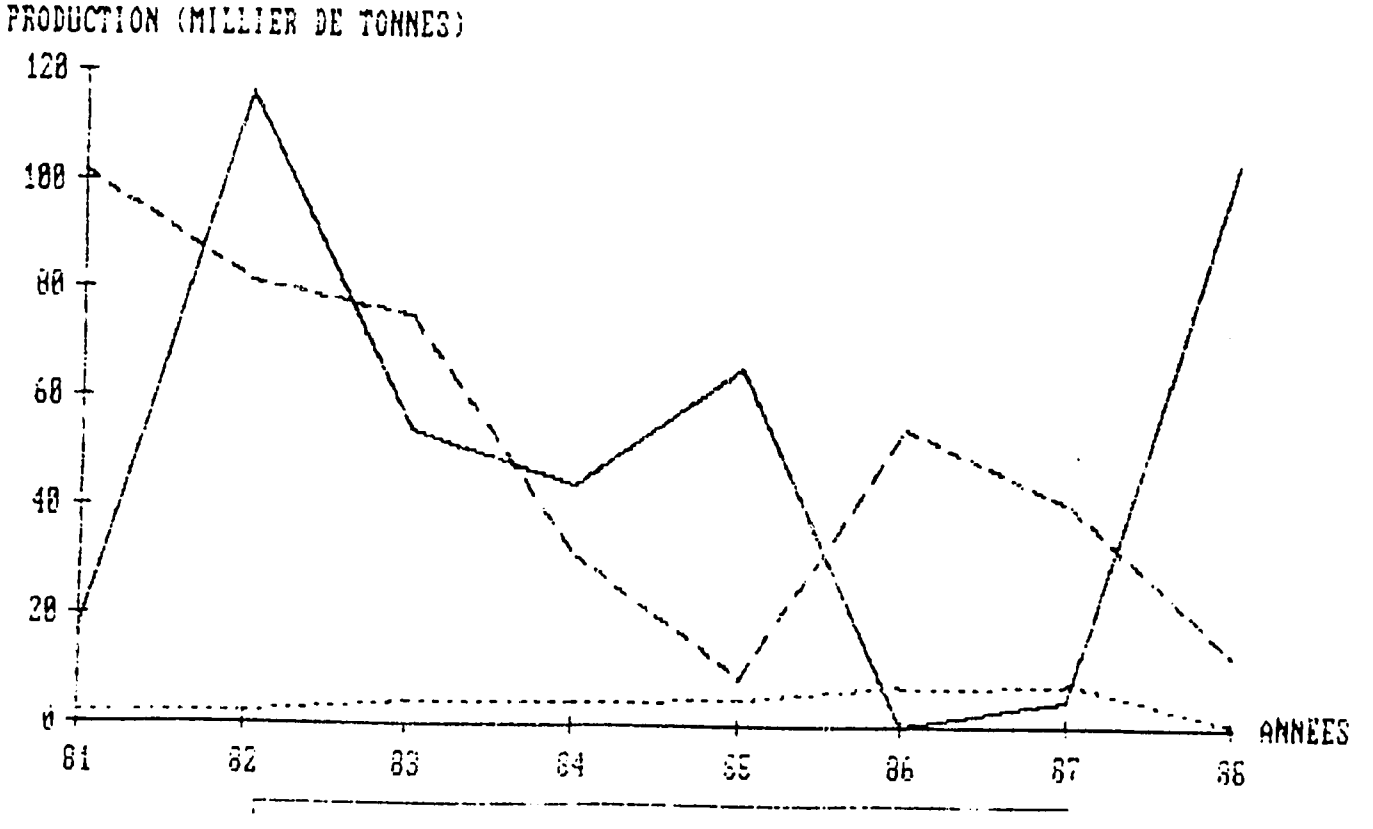


EXHIBIT 44

Tableau n°8.01: Production agricole. CULTURES VIVRIERES: superficie, production et rendement de 1981 à 1988.

ANNEE	CULTURES VIVRIERES									
	CEREALES						LEGUMINEUSES		TUBERCULES	
	mil	sorgho	riz	maïs	fonio	blé	niébé	voandzou	manioc	patate douce
SUPERFICIE (millier d'hectares)										
1981	3.038,3	982,2	20,7	9,4	2,6	•	1.197,6	16,3	25,9	4,3
1982	3.083,8	1.134,6	20,2	12,7	5,9	•	1.428,0	•	33,7	4,7
1983	3.135,6	1.106,6	22,2	10,5	5,9	•	1.608,5	12,2	14,8	•
1984	3.029,7	1.098,5	19,3	10,7	5,0	4,4	1.512,7	14,4	22,2	6,8
1985	3.168,7	1.142,2	20.6	7,2	1,9	3,5	1.566,2	8,0	18,1	3,1
1986	3.239,5	1.109,1	27,6	9,4	1,9	•	1.590,5	13,7	11,4	•
1987	3.016,7	1.342,3	24,8	14,0	5,4	•	1.790,8	21,0	•	•
1988	3.526,0	1.469,8	17,6	9,6	...	3,5	1.925,2	•	8,1	2,2
PRODUCTION (millier de tonnes)										
1981	1.313,8	321,7	38,9	6,5	0,9	•	281,6	8,1	187,9	16,3
1982	1.292,6	358,8	41,2	7,3	2,3	•	281,7	•	219,9	23,3
1983	1.298,4	355,4	44,8	6,7	2,6	•	271,4	5,2	164,9	•
1984	771,0	236,5	48,5	7,1	1,1	8,3	194,8	2,6	186,4	68,4
1985	1.449,9	329,2	56,7	3,4	0,4	6,9	115,3	3,5	196,4	38,3
1986	1.383,4	360,2	75,5	6,1	0,7	•	292,9	6,7	199,4	•
1987	996,9	365,9	61,4	7,8	1,7	•	208,8	10,7	•	•
1988	1.766,3	560,2	52,9	5,0	...	8,4	301,6	...	27,5	6,2
RENDEMENT (kg à l'hectare)										
1981	432	327	1.884	697	346	•	235	497	7.255	3.791
1982	419	316	2.037	576	390	•	197	•	6.525	4.936
1983	414	321	2.022	636	441	•	169	426	11.142	•
1984	254	215	2.518	559	220	1.886	129	181	8.396	10.059
1985	458	288	2.754	472	211	1.971	74	438	10.851	12.355
1986	427	325	2.730	649	368	•	184	489	17.491	•
1987	330	273	2.477	555	315	•	117	510	•	•
1988	501	381	3.011	517	...	2.400	157	•	3.395	2.818

Source: Annuaire Statistique

EXHIBIT 45

Tableau n°8.02: PRODUCTION AGRICOLE, CULTURES MARAICHERES et INDUSTRIELLES: superficie, production et rendement de 1981 à 1988.

ANNEE	CULTURES MARAICHERES				CULTURES INDUSTRIELLES		
	CONDIMENTS			LEGUMES			
	oignon	gombo	piment	tomate	canne	arachide	coton
SUPERFICIE (millier d'hectares)							
1981	0,9	1,1	0,6	0,6	5,7	208,7	2,1
1982	4,6	-	0,5	2,6	4,7	190,3	1,7
1983	1,9	-	-	-	-	167,0	3,8
1984	2,4	-	-	2,4	-	142,6	3,9
1985	3,0	-	-	1,8	-	29,7	4,4
1986	•	-	-	-	-	118,2	7,2
1987	0,1	4,3	-	-	-	158,2	9,9
1988	3,5	-	1,4	3,4	1,7	78,1	...
PRODUCTION (millier de tonnes)							
1981	17,2	-	-	3,8	122,4	101,7	1,8
1982	116,0	-	0,3	12,5	151,6	81,3	2,0
1983	53,9	-	-	-	-	74,9	4,0
1984	43,9	-	-	25,1	184,9	30,8	3,9
1985	65,6	-	-	22,8	107,6	8,4	4,4
1986	•	-	-	-	-	54,5	6,8
1987	4,8	5,5	-	-	-	40,5	7,5
1988	104,5	0,1	3,9	43,4	3,0	12,9	...
RENDEMENT (kg à l'hectare)							
1981	19.111	-	-	6.333	21.474	487	857
1982	25.217	-	600	4.808	32.255	427	1.176
1983	28.368	-	-	-	-	449	1.053
1984	18.292	-	-	10.458	23.250	216	1.000
1985	21.867	-	-	12.667	17.550	283	1.000
1986	•	-	-	-	-	461	944
1987	48.000	1.279	-	-	-	256	758
1988	29.857	-	2.786	12.765	1.765	165	...

Source: Annuaire Statistique

EXHIBIT 46

Tableau n°8.12: ELEVAGE, exportations contrôlées d'animaux vivants selon l'espèce et le pays de destination de 1981 à 1988.

Unité: tête.

ESPECE / Destination	ANNEE							
	1981	1982	1983	1984	1985	1986	1987	1988
BOVINS	42.911	51.677	64.681	128.073	91.552	3.720	437	6.493
Nigéria	42.911	51.677	64.667	128.023	91.487	3.720	437	6.168
Autres pays	-	-	14	50	65	-	-	325
OVINS	16.548	33.936	43.801	104.335	52.104	1.306	3.456	32.600
Algérie	800	450	410	2.752	1.789	280	1.394	2.472
Bénin	1.186	380	500	-	-	6	-	750
Côte d'Ivoire	331	850	115	2.860	760	260	1.080	3.996
Nigéria	14.231	32.256	42.776	98.723	49.505	760	982	19.846
Autres pays	-	-	-	-	50	-	-	5.536
CAPRINS	3.733	32.142	79.485	164.177	102.304	-	2.699	27.499
Nigéria	3.564	32.072	79.417	163.169	101.708	-	2.699	26.638
Autres pays	169	70	68	1.008	596	-	-	861
CAMELINS	100	-	9.630	21.027	8.409	-	67	4.061
Nigéria	100	-	9.459	21.027	8.409	-	67	1.735
Autres pays	-	-	171	-	-	-	-	2.326
EQUINS	19	-	500	174	-	-	-	-
Nigéria	19	-	500	174	-	-	-	-
Autres pays	-	-	-	-	-	-	-	-
ASINS	203	745	8.263	10.069	2.703	-	472	174
Nigéria	203	745	8.240	10.069	2.703	-	472	174
Autres pays	-	-	23	-	-	-	-	-

Source: Annuaire Statistique

EXHIBIT 47

Tableau n°8.11: ELEVAGE, ABATTAGES CONTROLES: nombre de têtes par département de 1981 à 1988.

Unité: tête.

ANNEE	AGADEZ	DIFFA	DOSSO	MARADI	NIAMEY	TAHOUA	ZINDER	NIGER
BOVINS								
1981	2.037	1.709	6.959	9.066	50.457	11.468	8.214	89.910
1982	1.795	2.595	7.606	10.972	50.534	12.787	8.129	94.418
1983	1.650	1.160	9.526	11.048	57.113	14.547	9.779	104.823
1984	1.853	1.244	10.589	13.604	56.530	14.725	11.871	110.416
1985	1.500	949	14.115	11.735	70.020	13.525	8.204	120.048
1986	1.760	374	6.601	6.557	38.991	8.454	3.888	66.625
1987								
1988	1.780	848	7.805	5.393	48.556	8.309	4.712	77.403
OVINS								
1981	21.622	6.099	4.679	21.853	77.824	24.097	17.101	173.275
1982	25.810	6.068	6.499	25.205	98.717	30.524	18.497	211.320
1983	30.221	5.366	8.634	28.030	113.129	32.845	24.260	242.485
1984	38.259	9.975	10.905	38.593	143.389	46.139	33.226	320.486
1985	34.519	939	20.848	46.759	122.435	39.052	38.151	302.703
1986	20.118	7.686	11.091	30.854	36.503	15.176	20.333	141.751
1987								
1988	45.310	17.745	19.075	40.439	55.429	27.170	36.325	241.493
CAPRINS								
1981	50.363	25.063	46.058	129.737	113.160	83.194	135.542	583.117
1982	64.885	24.079	42.944	125.583	116.769	74.908	123.017	572.185
1983	68.331	19.980	49.921	126.284	120.238	82.102	119.772	586.628
1984	61.594	26.269	61.267	132.858	122.121	83.091	142.390	629.590
1985	40.093	25.697	73.101	115.115	101.955	81.775	134.431	572.167
1986	38.169	27.553	55.652	91.280	80.857	70.760	91.514	455.785
1987								
1988	59.902	34.241	71.548	159.666	117.185	80.796	136.409	659.747
CAMELINS								
1981	2.945	744	210	298	2.384	2.138	1.259	9.978
1982	2.813	659	288	589	3.553	2.091	1.500	11.493
1983	3.613	1.045	258	482	3.112	2.837	2.656	14.003
1984	6.557	1.380	302	1.385	3.264	4.236	1.779	18.903
1985	7.878	1.928	649	3.125	8.259	8.703	2.725	33.267
1986	3.908	2.231	372	1.531	4.018	3.349	3.223	18.632
1987								
1988	2.831	1.200	250	325	2.954	796	2.826	11.182

Source: Annuaire Statistique

EXHIBIT 46

U.M.O.A. - COMMERCIALISATION DES PRINCIPAUX PRODUITS AGRICOLES D'EXPORTATION

	1984-1985	1985-1986	1986-1987	1987-1988	1988-1989
			Milliers de tonnes		
Arachide					
En coque					
Bénin	-	-	1,5	4,7	
Mali	1,3	3,5	11,0	6,6	5,3
Niger	1,3	2,6	52,4	–	...
Sénegal	235,7	347,6	614,0	710,8	415,2
Décortiquée					
Burkina (a)	0,2	7,5	0,8	0,4	1,4
Togo	9,3	15,1	19,6	...	
Cacao					
Bénin	1,3	0,1	1,0	...	...
Côte d'Ivoire (b)	570,9	563,3	619,8	673,9	848,9
Togo	9,8	14,3	12,6	11,1	8,2
Café					
Côte d'Ivoire	276,6	265,7	264,1	186,3	239,3
Togo	10,1	8,6	11,4	11,1	14,7
Coton graine					
Bénin	88,1	89,3	131,3	70,2	123,1
Burkina	88,1	115,5	169,2	148,0	145,9
Côte d'Ivoire	212,1	189,3	213,5	256,1	290,8
Mali	144,3	175,1	201,7	198,8	249,1
Niger	3,9	4,4	8,1	8,6	5,9
Sénégal	46,9	27,9	26,9	38,8	38,7
Togo	54,8	63,3	79,1	67,0	78,8
Karité					
Bénin	...	7,4	0,8	4,0	3,8
Burkina	1,6	70,0	8,4	1,8	4,2
Mali	...	13,8	...	...	...
Togo	0,9	20,9	4,5	16,7	0,9
Sésame					
Burkina	6,5	4,6	4,4	0,7	1,4
Régimes de palme					
Bénin	48,9	54,6	55,8	60,7	20,4
Côte d'Ivoire	697,3	927,4	970,9	824,3	...
Palmistes					
Bénin	24,7	7,8	7,1	9,1	...
Côte d'Ivoire	34,6	37,9	40,3	33,1	...
Togo	0,9	3,5	0,2		

(a) A compter de 1985 - 1986, y compris arachides en coque ramenées en décortiquées - (b) Achats bruts, y compris fraintes et sacheries

Sources : Organismes nationaux de commercialisation

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EXHIBIT 49

U.M.O.A. - PRODUCTION DES PRINCIPALES CULTURES VIVRIERES

	1984-1985	1985-1986	1986-1987	1987-1988	1988-1989
			Milliers de tonnes		
Maïs					
Bénin	379.2	425.1	375.6	267.3	454.2
Burkina	77.6	141.9	158.2	130.5	226.7
Côte d'Ivoire	480.0	420.0	435.0	302.6	314.4
Mali	74.0	200.0	185.1	143.0	214.5
Sénegal	98.5	146.9	107.9	113.6	123.3
Togo	221.8	181.6	127.0	172.1	296.3
Mil et sorgho					
Bénin	93.0	90.9	106.3	114.8	157.7
Burkina	1 019.6	1 425.7	1 597.7	1 479.6	1 825.5
Côte d'Ivoire	62.0	62.0	64.0	...	...
Mali	520.0	1 249.4	1 332.8	1 133.4	1 672.3
Niger	1 019.3	1 778.7	1 743.6	1 362.8	2 326.5
Sénegal	471.4	949.6	633.7	801.3	594.2
Togo	195.2	168.9	212.9	168.2	175.5
Riz paddy					
Benin	7.5	6.3	8.5	8.2	11.2
Burkina	41.0	20.9	27.0	21.8	39.1
Côte d'Ivoire	540.0	560.0	580.0	636.6	670.4
Mali	103.4	187.2	229.2	189.4	287.8
Niger	51.4	56.6	75.4	61.4	52.9
Sénegal	135.8	147.0	148.3	135.8	146.4
Togo	17.8	15.2	19.8	23.2	28.7
Igname					
Bénin	819.5	776.6	874.5	834.9	1 072.6
Côte d'Ivoire	2 500.0	2 300.0	2 400.0	1 178.7	1 202.8
Togo	341.9	364.4	409.4	360.4	378.7
Manioc					
Bénin	684.7	708.0	725.3	570.2	1 004.3
Côte d'Ivoire	1 250.0	1 250.0	1 300.0	1 024.8	1 064.7
Togo	444.4	474.4	410.7	355.2	413.1
Niébe					
Bénin	42.7	39.1	40.3	34.9	55.4
Niger	194.8	115.4	296.9	208.8	301.5
Sénegal	15.8	79.7	54.9	28.6	17.3
Togo	33.0	26.6	23.1	36.2	18.0
Banane "plantain"					
Côte d'Ivoire	1 000.0	1 010.0	1 045.0	740.4	778.1

N.B. - Pour le Bénin, le Burkina et la Côte d'Ivoire, année civile

Sources Ministères de l'Agriculture des Etats

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	Milliers de tonnes				
Arachide					
En coque					
Bénin	-	-	1,5	4,7	
Mali	1,3	3,5	11,0	6,6	5,3
Niger	1,3	2,6	52,4	–	e
Sénégal	235,7	347,6	614,0	710,8	415,2
Décortiquée					
Burkina (a)	0,2	7,5	0,8	0,4	1,4
Togo	9,3	15,1	19,6	e	
Cacao					
Bénin	1,3	0,1	1,0	...	...
Côte d'Ivoire (b)	570,9	563,3	619,8	673,9	848,9
Togo	9,8	14,3	12,6	11,1	8,2
Café					
Côte d'Ivoire	276,6	265,7	264,1	186,3	239,3
Togo	10,1	8,6	11,4	11,1	14,7
Coton graine					
Bénin	88,1	89,3	131,3	70,2	123,1
Burkina	88,1	115,5	169,2	148,0	145,9
Côte d'Ivoire	212,1	189,3	213,5	256,1	290,8
Mali	144,3	175,1	201,7	198,8	249,1
Niger	3,9	4,4	8,1	8,6	5,9
Sénégal	46,9	27,9	26,9	38,8	38,7
Togo	54,8	63,3	79,1	67,0	78,8
Karité					
Bénin	e	7,4	0,8	4,0	3,8
Burkina	1,6	70,0	8,4	1,8	4,2
Mali	e	13,8	...	...	...
Togo	0,9	20,9	4,5	16,7	0,9
Sésame					
Burkina	6,5	4,6	4,4	0,7	1,4
Régimes de palme					
Bénin	48,9	54,6	55,8	60,7	20,4
Côte d'Ivoire	697,3	927,4	970,9	824,3	...
Palmistes					
Bénin	24,7	7,8	7,1	9,1	...
Côte d'Ivoire	34,6	37,9	40,3	33,1	...
Togo	0,9	3,5	0,2	-	-

(a) A compter de 1985 - 1986, y compris arachides en coque ramenées en décortiquées - (b) Achats bruts, y compris fraintes et sacheries

Sources : Organismes nationaux de commercialisation

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EXHIBIT 50

U.M.O.A. - PRIX A LA PRODUCTION DES CULTURES D'EXPORTATION

	1984-1985	1985-1986	1986-1987	1987-1988	1988-1989
			Francs CFA le kilo		
Arachide					
En coque					
Niger	100.0	130.0	130.0	95.0	Libre
Sénégal	70.0	90.0	90.0	90.0	70.0
Decortiquee					
Burkina	138.758	150.0	90.0	90.0	95.0
Togo	175.0	175.0	150.0	45.0	50.0
Cacao					
Côte d'Ivoire	375.0	400.0	400.0	400.0	400.0
Togo	300.0	330.0	360.0	360.0	300.0
Cafe					
Benin	235.0	280.0	280.0	280.0	330.0
Côte d'Ivoire (cerises)	190.0	200.0	200.0	200.0	200.0
Togo (marchand)	315.0	365.0	400.0	400.0	350.0
Coton graine (1er choix)					
Benin	100.0	110.0	110.0	100.0	95.0
Burkina	90.0	100.0	100.0	95.0	95.0
Côte d'Ivoire	115.0	115.0	115.0	115.0	115.0
Mali	75.0	85.0	85.0	85.0	84.7
Niger	120.0	130.0	130.0	110.0	100.0
Sénégal	70.0	100.0	100.0	100.0	100.0
Togo	90.0	105.0	105.0	105.0	95.0
Karite					
Bénin	55.0	60.0	60.0	60.0	20.0
Burkina	58.0	70.0	40.0	15.0	15.0
Togo	65.0	80.0	50.0	35.0	15.0
Palmistes					
Benin	60.0	60.0	20.0	20.0	30.0
Togo	75.0	75.0	15.0	25.0	25.0

Sources : Journaux officiels des Etats

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EXHIBIT 51

Tableau n°9.01: INDUSTRIES EXTRACTIVES: production et exportation de l'uranium de 1982 à 1988

Unités: quantité en tonne; valeur en milliard de F.CFA

ANNEE	PRODUCTION		EXPORTATION		PRIX FOB COTONOU F.CFA / kg
	Quantité	Valeur	Quantité	Valeur	
1982	4.256	102,2	3.852	91,3	24.000
1983	3.423	94,2	3.491	94,2	27.500
1984	3.273	95,[illegible]	3.468	100,5	29.250
1985	3.181	93,2	3.042	90,9	29.300
1986	3.113	93,4	3.026	90,7	30.000
1987	2.970	87,0	2.948	85,3	29.300
1988	2.962	81,7	2.960	81,6	27.600
VARIATION ANNUELLE (en %)					
1982	-3	17	-23	-10	20
1983	-20	-8	-9	3	15
1984	-4	2	-1	7	6
1985	-3	-3	-12	-10	-
1986	-2	-	-1	-	2
1987	-5	-7	-3	-6	-2
1988	-	-6	-	-4	-6

Tableau n°9.02: INDUSTRIES EXTRACTIVES: production de cassitérite

Unités: quantité en tonne; valeur en million de F.CFA; teneur en %

ANNEE	QUANTITE DE MINERAI ACHETE (par gisement)			MINERAI TRAITE		MINERAI EXPORTE	
	El meki	Tarouadji	Total	Quantité	Teneur	Quantité	Valeur
1981	44,6	21,7	66,3	58,0	72,0	72,5	185,1
1982	•	•	•	52,0	•	36,0	85,0
1983	59,1	27,1	86,2	77,4	•	90,0	327,2
1984	102,2	33,2	135,4	108,9	72,5	108,0	408,8
1985	•	•	183,9	•	•	126,0	442,0
1986	92,3	32,2	124,5	101,4	•	18,0	116,0
1987	...	...	93,8	100,6	-	180,0	272,0
1988	...	...	140,9	126,2	72,8	162,0	252,0

N.B : A partir de 1980 le gisement de Timia n'est plus opérationnel.

Source: Annuaire Statistique

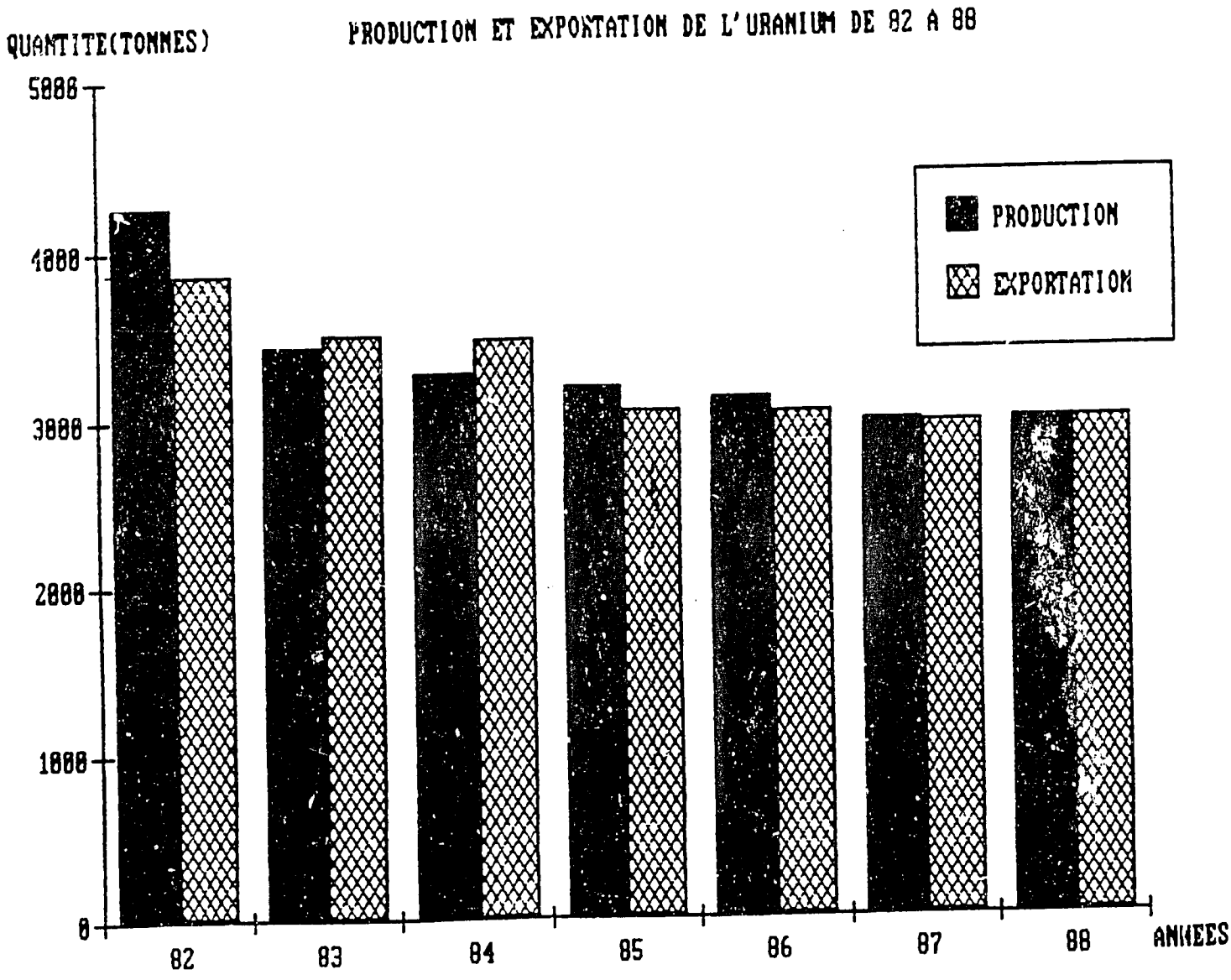
EXHIBIT 52

Tableau n°9.03: Production et consommation de charbon.

Unité: tonne

ANNEE	Production brute	Charbon livré au parc	Consommation centrale	Stocks en fin d'année
1982	109.185	98.462	99.062	15.196
1983	133.044	123.967	130.486	8.677
1984	129.985	123.644	119.989	12.332
1985	158.718	150.635	148.278	14.689
1986	154.888	148.111	158.354	4.446
1987	163.114	164.318	158.550	10.214
1988	159.316	149.755*	156.655	3.316*

*Estimations



Source: Annuaire Statistique

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EXHIBIT 53

GROWTH OF INDUSTRY

Percent

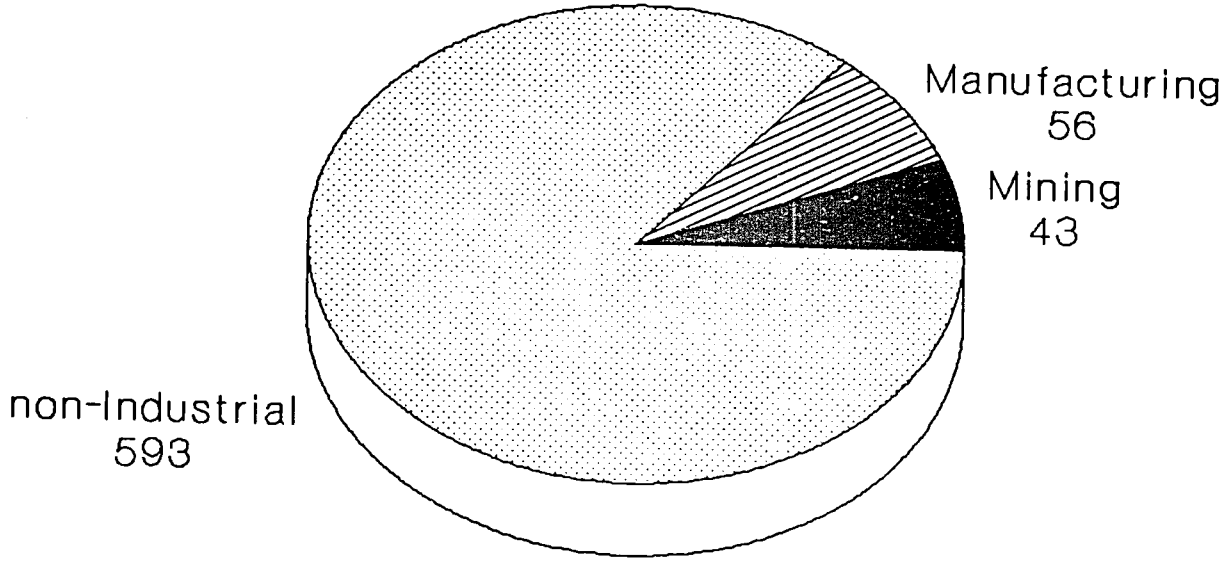
1980-88

Botswana	15.1
Mauritius	9.0
Mali	8.1
Cameroon	7.8
Chad	7.7
Uganda	6.4
Burundi	5.8
Benin	5.8
Congo	5.1
Mauritania	4.9
Senegal	3.8
Burkina Faso	3.7
Rwanda	3.6
Ethiopia	3.5
Malawi	3.0
Kenya	2.8
Zaire	2.5
Somalia	2.3
Central African Rep.	2.0
Ghana	1.9
Zimbabwe	1.7
Lesotho	1.6
Zambia	0.3
South Africa	0.2
Togo	0.0
Madagascar	-1.0
Tanzania	-2.0
Cote d'Ivoire	-2.4
Nigeria	-3.2
NIGER	***-4.3***
Sierra Leone	-4.9
Mozambique	-7.1

Note: Growth measured in constant 1988 U.S. dollars.

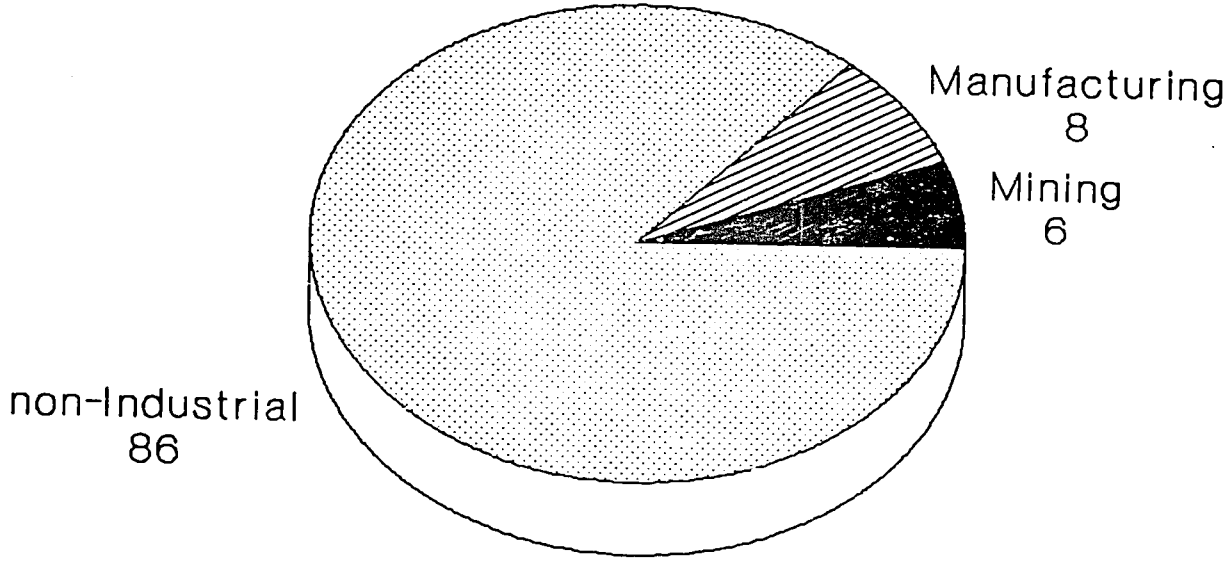
Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 180-181.

EXHIBIT 54
1988 INDUSTRIAL GDP (billions of FCFA)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 55
1988 INDUSTRIAL TO TOTAL GDP (%)



Source: Annuaire Statistique, 1988-1989

EXHIBIT 56

MANUFACTURING AS A SHARE OF GDP

Percent

1965		1988	
South Africa	23	Ethiopia	12
Zimbabwe	20	Chad	15
Zaire	16	Tanzania	4
Mauritius	14	Somalia	5
Senegal	14	Zaire	7
Chad	12	Madagascar	NA
Botswana	12	Burkina Faso	13
Cote d'Ivoire	11	Mali	5
Madagascar	11	Burundi	10
Kenya	11	Uganda	6
Togo	10	Nigeria	18
Cameroon	10	Zambia	25
Ghana	10	***NIGER***	***9***
Tanzania	8	Rwanda	15
Uganda	8	Kenya	12
Ethiopia	7	Togo	8
Nigeria	6	Central African Rep.	8
Zambia	6	Benin	6
Sierra Leone	6	Ghana	10
Mali	5	Lesotho	13
Mauritania	4	Sierra Leone	3
Central African Rep.	4	Senegal	19
Sudan	4	Zimbabwe	31
Somalia	3	Cote d'Ivoire	16
Liberia	3	Congo	8
NIGER	***2***	Botswana	5
Rwanda	2	Cameroon	13
Lesotho	1	Mauritius	25
		South Africa	25
		Gabon	51

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 182-183.

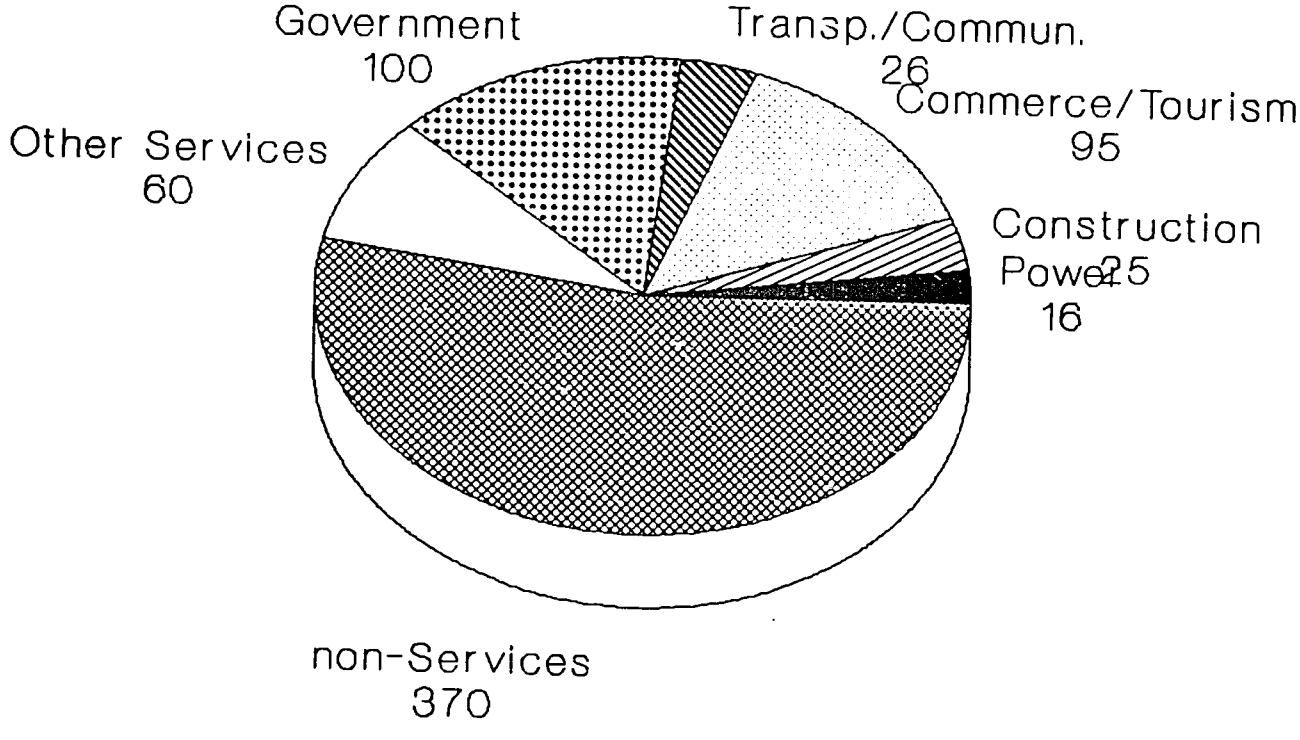
Tableau no 13.01: CAPACITE HOTELIERE, HOTELS CLASSES PAR CATEGORIE ET PAR DEPARTEMENT en 1983, 1986, 1987 et 1988

	1983		1986		1987		1988	
	Hôtels	Chambres	Hôtels	Chambres	Hôtels	Chambres	Hôtels	Chambres
CATEGORIE								
4 étoiles luxes	1	248	1	248	1	240	1	240
4 étoiles	7	362	7	362	7	381	7	381
3 étoiles	6	165	6	176	7	197	7	193
2 étoiles	6	122	7	122	8	181	7	158
1 étoile	4	38	7	74	6	70	7	111
TOTAL	24	935	28	982	29	1069	29	1083
DEPARTEMENTS								
AGADEZ	4	46	6	67	6	91	6	93
DIFFA	-	-	-	-	-	-	-	-
DOSSO	1	15	1	15	2	45	2	53
MARADI	2	120	2	120	2	117	2	117
NIAMEY	11	606	11	606	11	619	10	595
TAHOUA	3	61	4	77	4	77	4	81
TILLABERI	-	-	-	-	-	-	1	24
ZINDER	3	87	4	97	4	120	4	120

Tableau no 13.02: HOTELS DE NIAMEY, REPARTITION DES VISITEURS PAR PAYS DE PROVENANCE de 1984 à 1988

ANNEE	NON RESIDENTS AU NIGER							RESIDENTS AU NIGER	TOTAL
	France	Autres pays Européens	Pays de l'entente	Autres pays africains	Amerique	Reste du monde	Ensemble		
NOMBRE									
1984	14.385	8.438	3.519	8.820	2.520	2.756	40.438	3.437	43.875
1985	12.303	697	3.564	2.565	2.881	466	22.476	9.544	32.020
1986	11.454	726	2.790	1.810	2.293	69	19.142	10.142	29.284
1987	9.126	5.426	3.466	4.385	1.909	836	25.148	1.508	26.656
1988	5.653	4.933	3.787	6.584	2.405	1.230	24.592	1.946	26.538
POURCENTAGE (1)									
1984	36	21	9	22	6	7	92	8	100
1985	55	3	16	11	13	2	70	30	100
1986	60	4	15	9	12	-	65	35	100
1987	36	22	14	17	8	3	94	6	100
1988	23	20	15	27	10	5	93	-	100

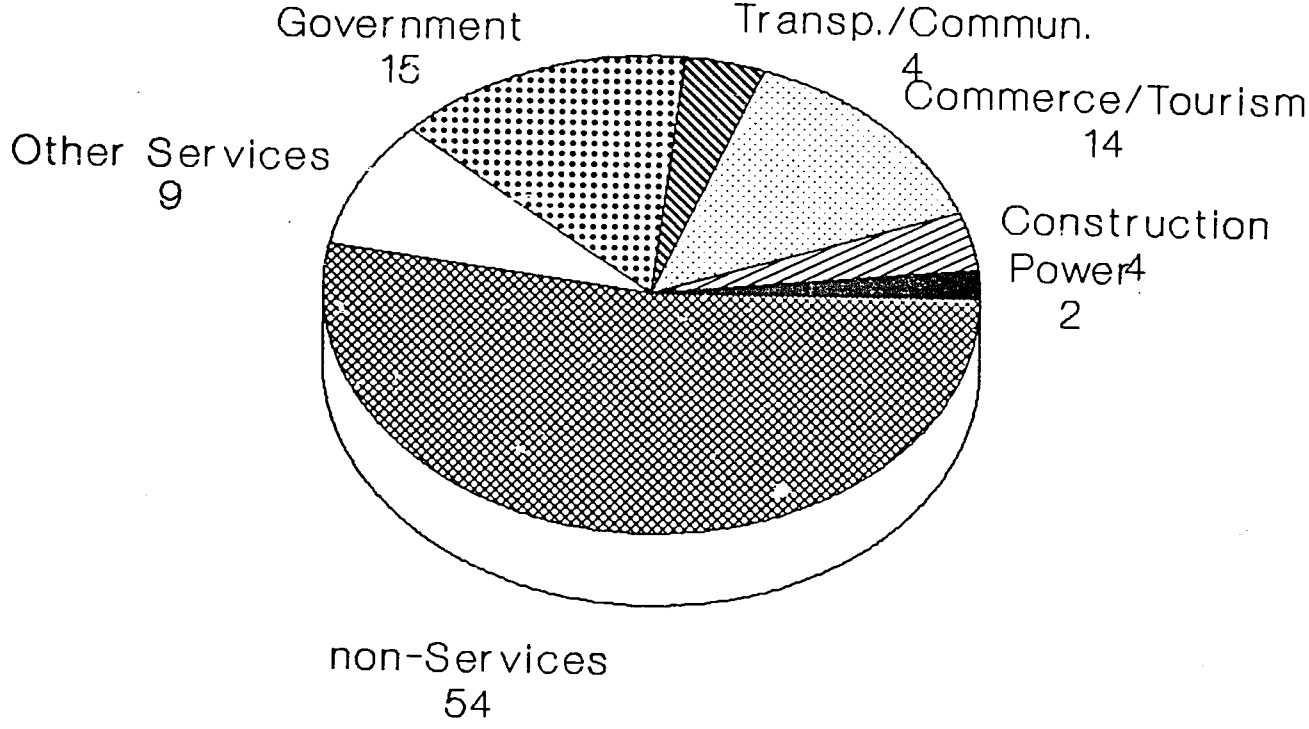
EXHIBIT 58
1988 SERVICES GDP (billions FCFA)



Source: Annuaire Statistique, 1988-1989

12.

EXHIBIT 59
1988 SERVICES GDP (%)



Source: Annuaire Statistique, 1988-1989

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EXHIBIT 60

GROWTH OF THE SERVICE SECTOR

1980-88

Botswana	10.3
Burundi	6.3
Mali	5.8
Burkina Faso	5.5
Kenya	5.5
Cameroon	5.5
Ghana	4.9
Mauritius	4.6
Chad	4.2
Cote d'Ivoire	4.2
Lesotho	4.1
Ethiopia	3.6
Congo	3.5
Uganda	3.4
Rwanda	3.4
Zimbabwe	3.4
Senegal	3.2
South Africa	2.6
Malawi	2.4
Central African Rep.	1.7
Somalia	1.2
Tanzania	1.0
Sierra Leone	0.7
Zaire	0.3
Zambia	0.0
Madagascar	-0.1
Nigeria	-0.4
Mauritania	-0.5
Benin	-1.0
Togo	-1.7
Mozambique	-3.1
NIGER	***-8.0***

Note: Growth measured in current 1988 dollars.

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 180-181.

EXHIBIT 61

LISTE DES ENTREPRISES PUBLIQUES A CARACTERE INDUSTRIEL ET COM
DES SOCETES D'ETAT ET D'ECONOMIE MIXTE PAR BRANCHE D'ACTIVITE

BRANCHE	RAISON SOCIALE
I	SONAL
II	COMINAK SOMAIR SMDN SMTT ONAREM
III	ABATOIR FRIGORIFIQUE LABOCEL OLANI ONEP ONERSOL ATELIER ADEP BINI SNC SONISALT SONITEXTIL
IV	NIGELEC SONICHAR SNE
V	CONCERTA ONAHA OFEDES
VI	COPRO NIGER SONIDEP SONHOTEL ONPPC CSPPN SPEHG
VII	SNTN NITRA STIN OPT
VIII	BALINEX CREDIT DU NIGER SONIBANK CAISE NLE D'EPARGNE CPCT SNAR LEVMA SONUCI SOCOGEM ANP CCAIAN CNUT ECOBAR FIPNEM
IX	ORTN PALAIS DES CONGRES SGBK

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EXHIBIT 62

ANNEXE 2

PRINCIPAUX INDICATEURS RETENUS
POUR L'ANALYSE FINANCIERE

	1983	1986	1987	1988	1989	% 86/83	% 87/86	% 88/87	% 89/88	% 89/83
PRODUCT.	30430	50895	68469	57040	54519	40,21	25,67	-20,04	-4,62	44,18
CH.AFF.	103308	99435	97876	84918	78878	-3,90	-1,59	-15,26	-7,66	-30,97
VAL.AJ.	26131	32399	26759	30065	31868	19,35	-21,08	11,00	5,66	18,00
R.EXPL.	-8126	3992	4370	1185	1977	303,56	8,65	-268,78	40,06	511,03
F.PERS.	10000	10829	11522	14079	14462	7,66	6,01	18,16	2,65	30,85
D.LMT.	61484	57556	54340	48879	46364	-6,82	-5,92	-11,17	-5,42	-32,61
D.CT.	62335	43902	45223	42724	44300	-41,99	2,92	-5,85	3,56	-40,71
CREANCES	38066	34753	40192	37928	41529	-9,53	13,53	-5,97	8,67	8,34
INVEST.	7130	18200	7522	6167	8510	60,82	-141,96	-21,97	27,53	16,22
EFFECTIF	9671	9848	9828	9706	9589	1,80	-0,20	-1,26	-1,22	-0,86

Montants en Millions F CFA,Effectif en Unités

TAUX 1 = VARIATION ENTRE 1983 ET 1986
TAUX 2 = " " 1986 ET 1987
TAUX 3 = " " 1987 ET 1988
TAUX 4 = " " 1988 ET 1989
TAUX 5 = " " 1983 ET 1989

Source: Ministry of Finance; World Bank

EXHIBIT 63

CRÉDITS A COURT TERME : Utilisations déclarées à la Centrale des Risques du Niger*

GROUPES	BRANCHES D'ACTIVITÉ	1989						1990						
		Juillet	Aout	Septembre	Octobre	Novembre	Décembre	Janvier	Février	Mars	Avril	Mai	Juin	Juillet
		Millions de francs c.f.a												
10	**Agriculture, sylviculture et pêche**													
11	Agriculture et chasse	5 192	5 171	5 097	5 186	3 724	3 668	3 774	3 764	3 807	3 829	3 754	3 613	3 699
12	Sylviculture et exploitation forestiere	-	-	-	-	-	-	-	-	-	-	-	-	-
13	Pêche	-	-	-	-	-	-	-	-	-	-	-	-	-
20	**Industries extractives**													
21	Extraction du charbon	-	-	-	-	-	-	-	-	-	-	-	-	-
22	Production de petrole brut et de gaz naturel	-	-	-	-	-	-	-	-	-	-	-	-	-
23	Extraction de minerais métalliques	-	-	-	-	-	21	-	-	-	-	-	-	-
29	Extraction d'autres minerais	366	88	589	112	554	826	341	205	381	165	45	733	1 146
30	**Industries manufacturières**													
31	Fabrication de produits alimentaires, boissons, tabacs	2 912	3 192	3 053	2 981	2 774	2 929	2 784	3 165	3 143	3 144	3 149	3 183	3 178
32	Industrie des textiles, de l'habillement et du cuir	2 798	2 868	2 548	2 727	2 871	2 730	2 507	2 950	2 822	2 407	2 409	2 152	2 413
33	Industrie du bois et fabrication d'ouvrages en bois	181	184	179	179	186	184	185	183	184	176	176	175	176
34	Fabrication du papier, imprimerie, édition	483	484	487	491	503	495	489	431	460	468	504	449	435
35	Industrie chimique et fabrication de produits chimiques	1 101	1 135	1 221	1 223	1 318	1 612	1 604	1 582	1 576	1 529	1 490	1 473	1 486
36	Fabrication de produits minéraux non métalliques	2 693	2 698	2 691	2 691	2 685	2 678	2 676	2 676	2 676	2 705	2 705	2 696	2 688
37	Industrie metallurgique de base	32	32	32	32	32	32	32	32	32	32	32	32	32
38	Fabrication d'ouvrages en métaux, de machines, de matériel	1 664	1 697	1 724	1 739	1 690	1 661	1 661	1 635	1 635	1 638	1 638	1 637	1 637
39	Autres industries manufacturières													
40	**Électricité, gaz, eau**													
41	Électricité, gaz, vapeur	11		12	19	25	4	24	27	29	26	26	26	44
42	Installation de distribution d'eau et disinbution publique de l'eau	33	34	71	20	54	74	68	25	24	35	36	51	45
50	**Bâtiment, travaux publics**													
50	Bâtiment et travaux publics	11 384	11 410	11 615	11 764	11 806	11 913	12 296	11 702	11 383	12 286	12 177	12 508	12 335
60	**Commerce gros et détail, restaurants, hôtels**													
61	Commerce de gros	37 744	36 873	36 244	36 373	36 704	35 792	37 108	35 921	37 036	38 153	37 759	37 478	38 097
62	Commerce de detail	17 087	16 755	16 954	16 993	16 161	15 892	16 761	16 635	16 660	17 398	17 549	17 168	17 382
63	Restaurants, hôtels, installations touristiques	1 921	2 203	2 230	2 241	2 213	2 192	2 176	2 198	2 212	2 216	2 214	2 196	2 206
70	**Transports, entrepôts et communications**													
71	Transports et entrepôts	8 033	7 631	7 547	7 714	7 772	7 445	7 601	7 603	8 113	7 815	7 680	7 671	7 681
72	Communications													
80	**Assurances, affaires immobilières, services aux entreprises**													
81	Établissements financiers													
82	Assurances													
83	Affaires immobilières et services aux entreprises	183	241	222	229	143	263	167	234	6 216	6 270	6 254	6 182	6 189
90	**Services fournis à la collectivité, services sociaux et personnels**													
91	Administration publique et défense nationale													
92	Services sanitaires et services analogues	66	68	68	68	75	75	75	68	68	68	68	51	51
93	Services sociaux fournis à la collectivite	315	308	312	311	318	318	201	201	190	189	176	171	180
94	Services récréatifs et services culturels	483	481	494	513	494	494	496	482	526	527	527	514	521
95	Services fournis aux ménages et aux particuliers	538	547	551	562	480	512	530	520	545	502	549	519	529
96	Organisations internationales et autres organismes extra territoriaux	155	119	143	149	175	166	168	157	144	147	154	145	147
97	Secteurs non specifies	370	450	692	587	1 256	485	344	848	991	607	631	519	1 280
99	Prets aux particuliers	584	566	536	562	639	502	576	564	563	596	659	663	583
	TOTAL	**96 331**	**95 415**	**95 312**	**95 466**	**94 652**	**92 963**	**94 644**	**94 808**	**95 422**	**96 934**	**96 367**	**96 011**	**98 166**
	Entreprises privées	**70 547**	**69 422**	**69 384**	**69 284**	**69 987**	**67 901**	**68 850**	**69 371**	**69 697**	**70 489**	**70 595**	**70 257**	**71 992**
	Entreprises publiques	**25 784**	**25 993**	**25 928**	**26 182**	**24 665**	**25 062**	**25 794**	**25 437**	**25 725**	**26 445**	**25 772**	**25 754**	**26 174**

* Par l'ensemble des banques etablies au Niger

Source: BCEAO

EXHIBIT 64

CRÉDITS A MOYEN TERME ET LONG TERME : Utilisations déclarées à la Centrale des Risques du Niger*

GROUPES	BRANCHES D'ACTIVITÉ	Moyen terme					Long terme				
		1989			1990		1989			1990	
		30 juin	30 sept	31 déc	31 mars	30 juin	30 juin	30 sept.	31 déc.	31 mars	30 juin
		Millions de francs c.f.a.									
10	**Agriculture, sylviculture et pêche**										
11	Agriculture et chasse	323	330	337	322	385	7	7	7	10	9
12	Sylviculture et exploitation forestière	-	-	-	-	-	-	-	-	-	-
13	Pêche	-	-	-	-	-	-	-	-	-	-
20	**Industries extractives**										
21	Extraction du charbon	216	-	-	-	-	-	-	-	-	-
22	Production de pétrole brut et de gaz naturel	-	103	-	-	-	-	-	-	-	-
23	Extraction de minerais métalliques	103	-	-	1 710	1 710	-	-	-	-	-
29	Extraction d'autres minerais	-	-	-	-	-	-	-	-	-	-
30	**Industries manufacturières**										
31	Fabrication de produits alimentaires, boissons, tabacs	371	343	339	89	89	-	-	-	-	-
32	Industrie des textiles, de l'habillement et du cuir	316	278	253	225	225	-	-	-	-	-
33	Industrie du bois et fabrication d'ouvrages en bois	-	-	-	-	-	-	-	-	-	-
34	Fabrication du papier, imprimerie, édition	1	1	-	-	-	-	-	-	-	-
35	Industrie chimique et fabrication de produits chimiques	42	38	35	31	31	-	-	-	-	-
36	Fabrication de produits minéraux non métalliques	-	-	-	-	-	-	-	-	-	-
37	Industrie métallurgique de base	-	-	-	-	-	-	-	-	-	-
38	Fabrication d'ouvrages en métaux, de machines, de matériel	22	22	22	22	22	-	-	-	-	-
39	Autres industries manufacturières	-	-	-	-	-	-	-	-	-	-
40	**Électricité, gaz, eau**										
41	Électricité, gaz, vapeur	-	-	-	-	-	-	-	-	-	-
42	Installation de distribution d'eau et distribution publique de l'eau	-	-	20	19	19	-	-	-	-	-
50	**Bâtiment, travaux publics**										
50	Bâtiment, travaux publics	575	611	783	626	939	-	-	-	-	-
60	**Commerce gros et détail, restaurants, hôtels**										
61	Commerce de gros	1 351	1 230	1 240	960	961	-	-	-	5	10
62	Commerce de détail	149	98	271	162	290	-	-	-	-	-
63	Restaurants, hôtels, installations touristiques	11	11	11	-	-	566	-	-	-	-
70	**Transports, entrepôts et communications**										
71	Transports et entrepôts	150	153	158	171	216	513	513	411	396	396
72	Communications	-	-	-	-	-	-	-	-	-	-
80	**Assurances, affaires immobilières, services aux entreprises**										
81	Établissements financiers	-	-	-	-	-	-	-	-	-	-
82	Assurances	-	-	-	-	-	-	-	-	-	-
83	Affaires immobilières et services aux entreprises	10	9	57	6	54	-	-	-	-	-
90	**Services fournis à la collectivité, services sociaux et personnels**										
91	Administration publique et défense nationale	-	-	-	-	-	-	-	-	-	-
92	Services sanitaires et services analogues	-	-	-	9	25	-	-	-	-	-
93	Services sociaux fournis à la collectivité	21		36	-	-	-	-	-	-	-
94	Services récréatifs et services culturels	13	13	31	19	31	-	-	-	-	-
95	Services fournis aux ménages et aux particuliers	26	31	16	-	-	-	-	-	-	-
96	Organisations internationales et autres organismes extra-territoriaux	-	89	84	187	104	-	23	5	19	26
97	Secteurs non spécifiés	443	462	486	489	501	590	500	520	715	688
99	Prêts aux particuliers										
	TOTAL	4 143	3 822	4 179	5 04[illegible]	5 602	1 676	1 043	943	1 145	1 129
	Entreprises privées	1 997	2 215	2 582	3 774	4 329	597	530	53[illegible]	749	733
	Entreprises publiques	2 146	1 607	1 597	1 273	1 273	1 079	513	411	396	396

* Par l'ensemble des banques établies au Niger

Source: BCEAO

EXHIBIT 65

NIGER – SITUATION DES BANQUES

	1986		1987	
	Septembre	Décembre	Septembre	Décembre
	Milliards de francs CFA			
Avoirs exterieurs (net)	– 39.6	– 36.3	– 29.6	– 35.4
Réserves	21.6	23.1	19.9	29.2
Creances sur l'Etat	21.1	20.7	20.4	19.5
Credits a l'economie	106.1	114.1	111.4	108.3
ACTIF = PASSIF	**109.2**	**121.6**	**122.1**	**121.6**
Depôts des particuliers et entreprises	76.4	79.2	76.4	77.2
– Organismes publics	12.7	15.4	18.0	13.3
– Autres	63.7	63.8	58.4	63.9
Dépôts de l'Etat	21.4	21.8	22.5	20.0
Credits de la Banque centrale	17.8	26.4	28.0	30.6
Autres elements (net)	– 6.4	– 5.8	– 4.8	– 6.2

	1988				1989		
	Mars	Juin	Sept.	Dec.	Mars	Juin	Sept
	Milliards de francs CFA						
Avoirs exterieurs (net)	– 35.5	– 35.8	– 36.5	– 30.8	– 31.4	– 33.5	– 31.4
Réserves	33.2	36.1	36.7	38.1	35.4	36.6	43.4
Creances sur l'Etat	19.2	19.1	18.6	18.6	17.0	17.0	17.0
Credits a l'économie	117.0	112.6	108.8	107.0	110.0	107.4	105.1
ACTIF = PASSIF	**133.9**	**132.0**	**127.6**	**132.9**	**131.0**	**127.5**	**134.1**
Depôts des particuliers et entreprises	84.6	86.7	83.1	88.0	91.8	90.2	92.2
– Organismes publics	10.7	12.2	12.2	10.3	9.4	9.9	6.3
– Autres	73.9	74.5	70.9	77.7	82.4	80.3	85.9
Dépôts de l'Etat	23.5	22.2	22.1	23.4	24.8	23.0	22.5
Credits de la Banque centrale	32.6	29.3	29.1	29.4	27.7	26.3	27.2
Autres elements (net)	– 6.8	– 6.2	– 6.7	– 7.9	– 13.3	– 12.0	– 7.8

Source B C E A O

EXHIBIT 66

NOMINAL INTEREST RATES OF BANKS

Average Annual Percentages

	Deposit Rate 1988	Lending Rate 1988
Uganda	26.00	35.00
Tanzania	17.46	29.63
Ghana	16.50	25.58
Sierra Leone	16.33	28.00
Somalia	16.25	33.67
South Africa	13.54	15.33
Malawi	13.50	22.25
Nigeria	13.09	13.96
Madagascar	11.50	--
Zambia	11.44	18.39
Kenya	10.33	15.00
Mauritius	10.00	14.96
Zimbabwe	9.68	13.00
Lesotho	9.58	13.67
Gabon	8.17	11.79
Congo	7.81	11.79
Ethiopia	7.50	6.00
Central African Rep.	7.44	12.25
Cameroon	7.21	13.46
Togo	6.71	7.13
Rwanda	6.25	12.00
Mauritania	6.00	12.00
Burkina Faso	5.25	7.29
Mali	5.25	6.63
NIGER	***5.25***	***8.00***
Benin	5.25	7.13
Senegal	5.25	6.96
Cote d'Ivoire	5.25	7.13
Botswana	5.00	7.83
Chad	4.31	10.79
Burundi	4.00	12.00

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 202-203.

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EXHIBIT 67

MINISTERE DES FINANCES

DIRECTION DES PARTICIPATIONS

P. R. S. P.

RATIONALISATION DU SECTEUR PARAPUBLIC

LIQUIDATIONS, PRIVATISATIONS, REHABILITATIONS

OCTOBRE 90

EP liquidées	EP privatisées	EP à privatiser	EP en réhabilitation
A. LIQUIDEES	A. TOTALEMENT	A. TOTALEMENT	
1. SONIFAME	1. SNCP	1. OLANI	1. CNE
2. SOPAC	2. SOTRAMIL	2. VETOPHAR	2. ORTN (1)
3. UNCC	3. SONITAN		3. RINI
4. SONIEN	4. CMAN		4. ONAHA
	5. SNT		5. OPVN (1)
B. EN COURS	6. Centrale APP.		6. OPT (1)
1. CNCA	7. INN		7. NIGELEC (1)
2. AIR NIGER			8. SONICHAR (1)
3. OPEN	B. PARTIELLEMENT	B. PARTIELLEMENT	9. OFEDES
4. SONERAN	1. NITRA	1. SNTN (1)	10. CREDIT DU NIGER
5. SONICERAM	2. LEYMA	2. OFEDES	11. SONUCI
6. SONARA	3. SONITEXTIL	3. COPRO-NIGER	12. CPCT
7. SICONIGER		4. RINI	
8. BDRN			

EP = ENTREPRISES PUBLIQUES

(1). Sous Contrat - Programme

OCTOBRE 1990

Source: Ministry of Finance

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EXHIBIT 68

FLOW OF PUBLIC AND PRIVATE EXTERNAL CAPITAL

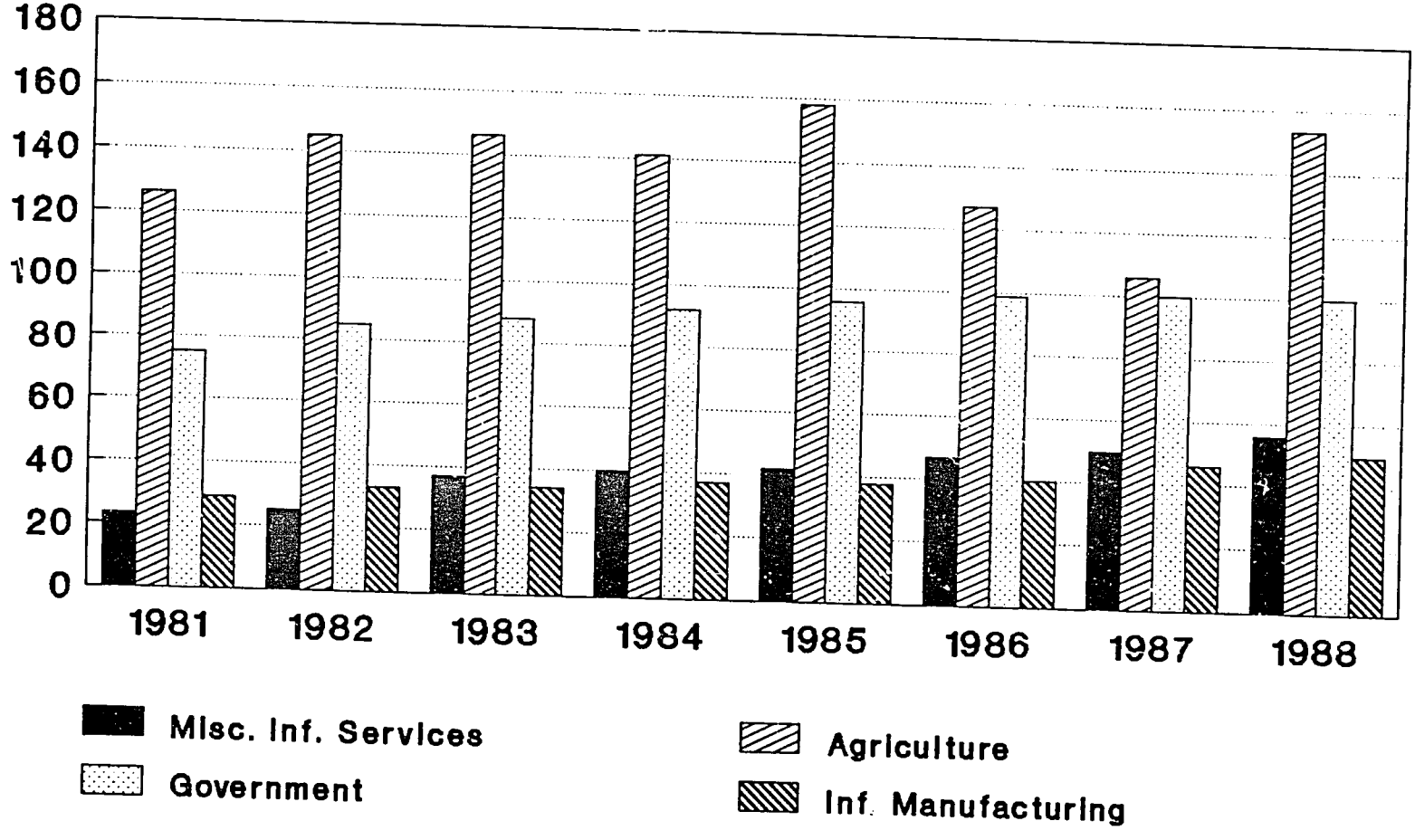
Disbursements In Millions Of Current 1988 Dollars

	Public	Private
Nigeria	693	83
Cameroon	553	115
Ethiopia	465	0
Cote d'Ivoire	440	850
Congo	410	0
Ghana	344	9
Zaire	328	0
Kenya	291	196
Senegal	272	8
Zimbabwe	233	43
Madagascar	230	0
Uganda	212	0
Mauritius	212	17
Tanzania	191	0
Gabon	161	0
Mali	154	0
NIGER	***150***	***28***
Mozambique	146	14
Zambia	130	0
Mauritania	129	0
Malawi	116	9
Burundi	99	0
Burkina Faso	92	0
Central African Rep.	83	0
Rwanda	82	0
Togo	73	0
Chad	59	0
Benin	51	0
Lesotho	51	0
Botswana	51	0
Somalia	47	0
Sierra Leone	20	0

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 220-221.

EXHIBIT 69

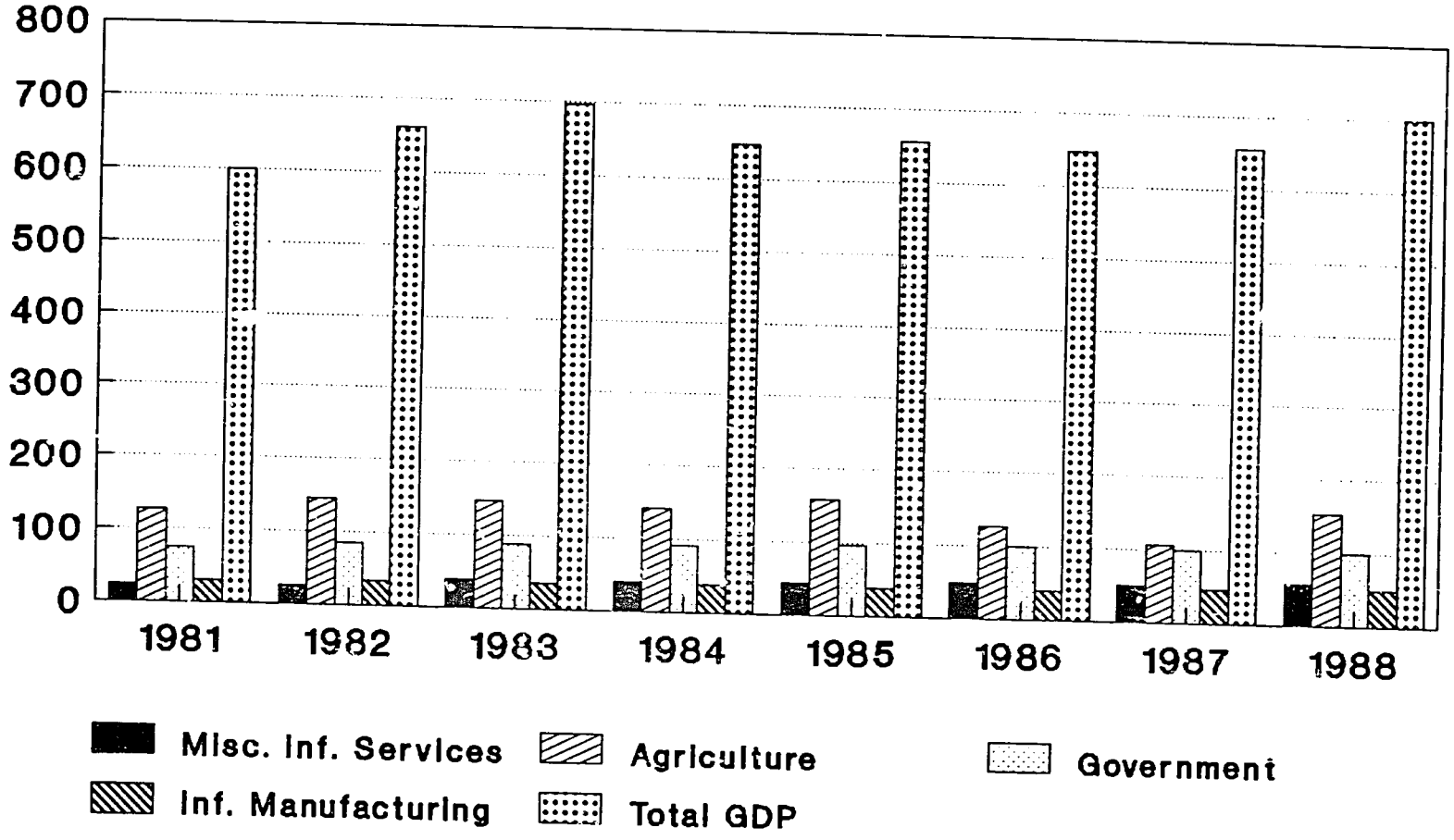
LEADING SECTORS: 1981-1988 (FCFA bil.)



Source: Ann. Statistique

EXHIBIT 70

LEADING SECTORS/TOTAL GDP (FCFA bil.)



Source: Ann. Statistique

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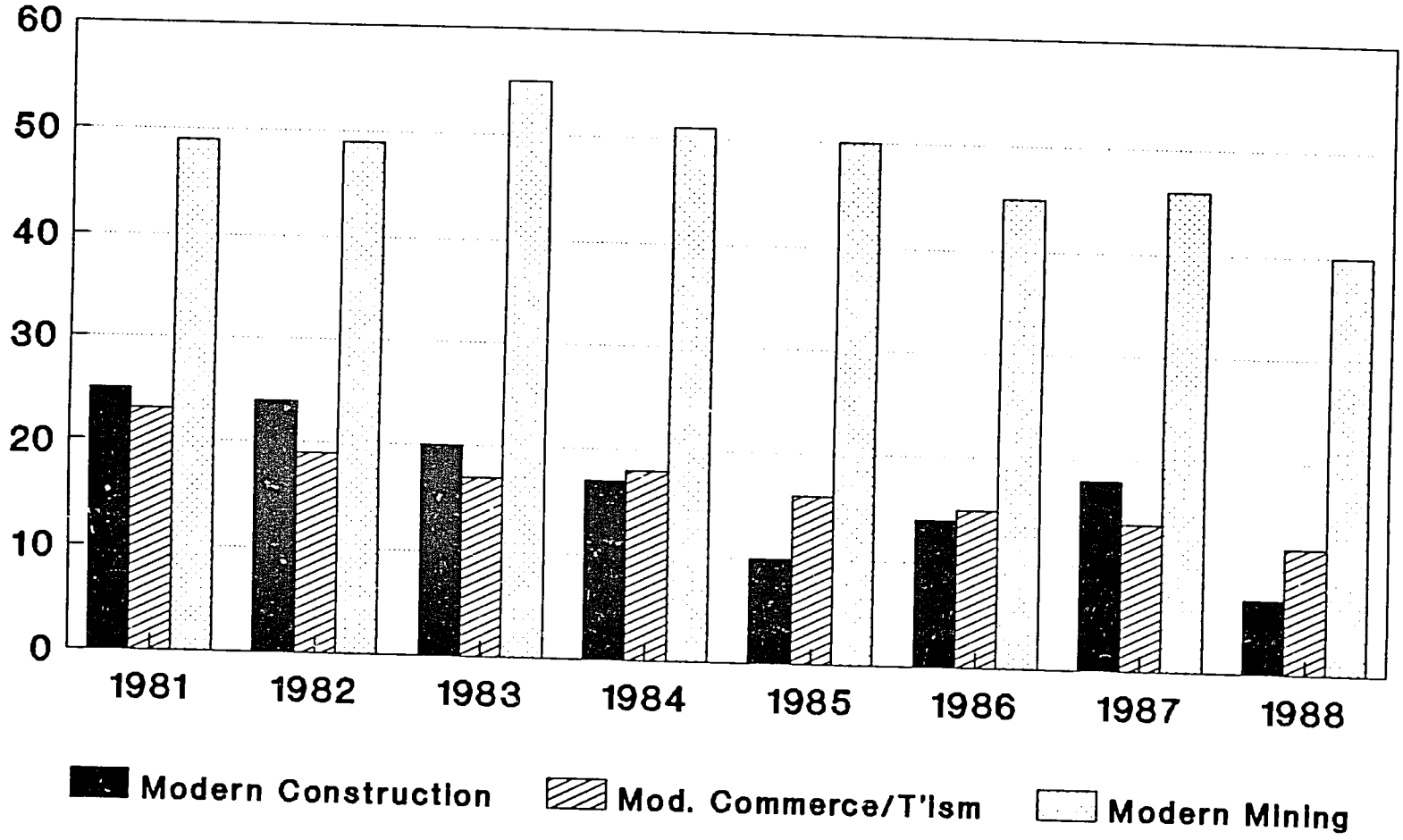
EXHIBIT 71

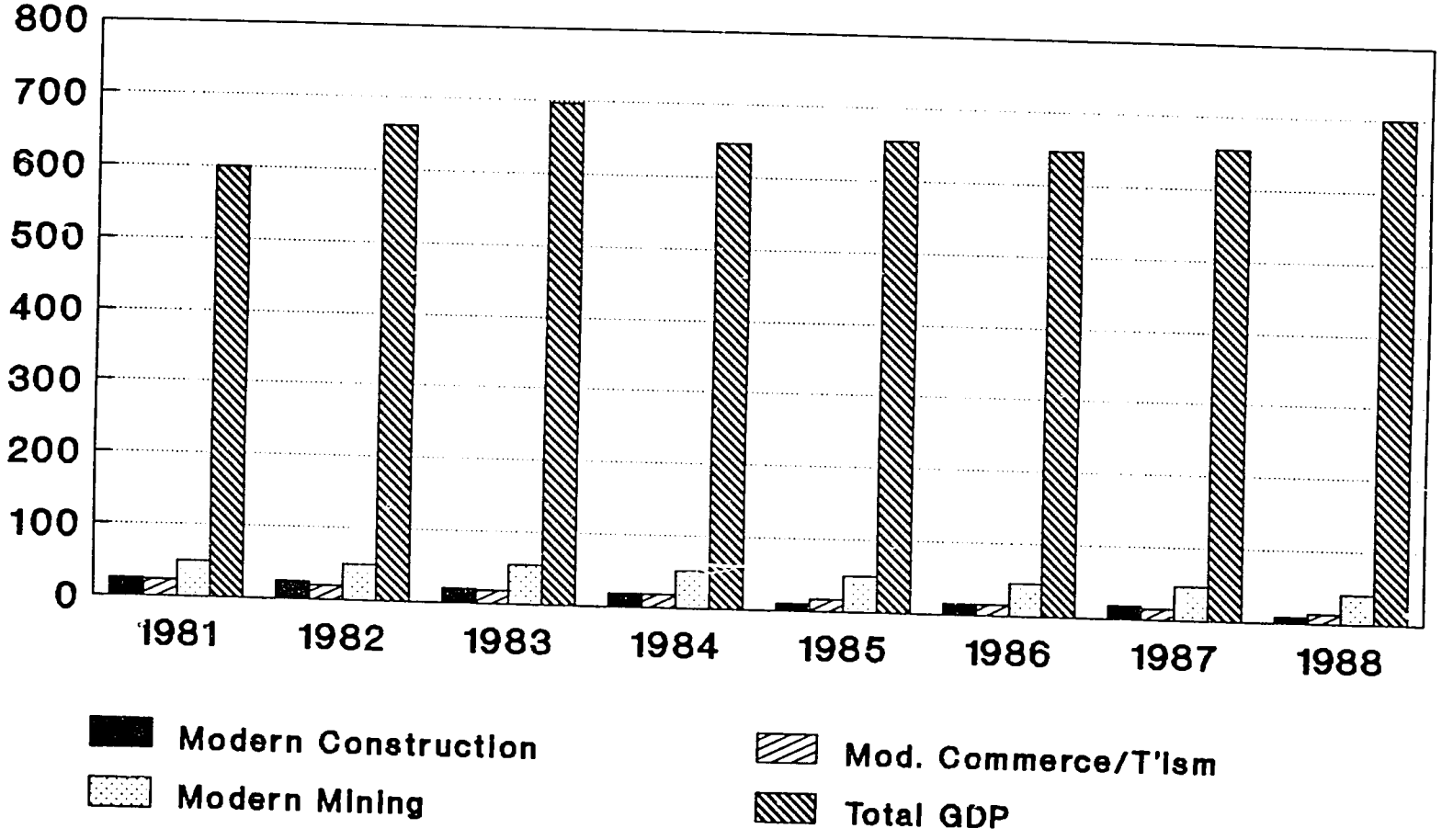
LAGGING SECTORS: 1981-1988 (FCFA bil.)



Source: Ann. Statistique

EXHIBIT 72

LAG. SECTORS/TOTAL GDP:1981-88 (CFA bil)



Source: Ann. Statistique

EXHIBIT 73

NIGER - BALANCE DES PAIEMENTS

	1985	1986*	1987*	1988**	1989
	Milliards de francs CFA				
Marchandises	- 38.7	6.3	9.1	0.2	- 8.4
dont : *Exportations FOB*	*116.6*	*114.8*	*123.8*	*109.9*	*98.2*
Importations CAF	*- 155.3*	*- 108.5*	*- 114.7*	*- 109.7*	*- 106.6*
Services	- 59.0	- 56.0	- 60.7	- 51.0	- 50.7
Transferts sans contrepartie	68.9	36.4	27.7	32.4	30.8
dont : *Prives*	*- 24.7*	*- 15.0*	*- 15.0*	*- 13.4*	*- 12.9*
Publics	*93.6*	*51.4*	*42.7*	*45.8*	*43.7*
Balance des paiements courants	**- 28.8**	**- 13.3**	**- 23.9**	**- 18.4**	**- 28.3**
Mouvements de capitaux non monetaires a long terme	24.7	21.5	27.4	31.4	29.0
Balance de base	**- 4.1**	**8.2**	**3.5**	**13.0**	**- 0.7**
Mouvements de capitaux non monetaires a court terme	- 0.3	- 5.7	5.7	-	- 4.3
Erreurs et omissions nettes	4.2	1.4	- 5.1	1.2	- 2.8
Balance globale	**- 0.2**	**3.9**	**4.1**	**14.2**	**- 6.4**

N.B. - Le signe + indique un excedent le signe - indique un deficit

*Donnees provisoires - ** Estimations

Source B.C.E.A.O.

SENEGAL - BALANCE DES PAIEMENTS

	1985*	1986*	1987*	1988**	1989**
	Milliards de francs CFA				
Marchandises	- 126.3	- 78.4	- 81.0	- 74.1	- 68.1
dont : *Exportations FOB*	*231.2*	*227.5*	*202.3*	*226.6*	*246.1*
Importations FOB	*- 357.5*	*- 305.9*	*- 283.3*	*- 300.7*	*- 314.2*
Services	- 67.9	- 78.6	- 69.0	- 76.1	- 74.6
Transferts sans contrepartie	71.8	64.0	73.0	70.6	92.5
dont : *Prives*	*3.0*	*3.3*	*9.0*	*9.5*	*9.5*
Publics	*68.8*	*60.7*	*64.0*	*61.1*	*83.0*
Balance des paiements courants	**- 122.4**	**- 93.0**	**- 77.0**	**- 79.6**	**- 50.2**
Mouvements de capitaux non monetaires a long terme	91.0	106.0	120.2	71.2	100.0
Balance de base	**- 31.4**	**13.0**	**43.2**	**- 8.4**	**49.8**
Mouvements de capitaux non monetaires a court terme	- 11.4	25.8	- 38.7	- 32.7	- 13.9
Erreurs et omissions nettes	6.9	5.8	- 7.0	- 2.0	2.0
Balance globale	**- 35.9**	**44.6**	**- 2.5**	**- 43.1**	**37.9**

N.B. - Le signe + indique un excedent le signe - indique un deficit

*Donnees provisoires - ** Estimations

Source B.C.E.A.O

EXHIBIT 74

STRUCTURE OF MERCHANDISE EXPORTS
(Percentage Share of Merchandise Exports)

1988

	Fuels, Minls and Metals	Other Primary Comms	Machin. Transpt Equipmt	Other Manu-factrs.	Textls and Cloth	Merch Exports Millions of US$
South Africa	11	9	3	77	NA	19714
Nigeria	88	10	0	2	0	7390
Cote d'Ivoire	3	85	3	9	NA	2359
Cameroon	53	35	2	10	1	1639
Zimbabwe	13	47	3	37	3	1589
Gabon	59	27	3	11	NA	1204
Mauritius	0	39	4	58	47	1110
Zambia	95	3	1	1	NA	1073
Kenya	20	63	2	15	NA	1034
Congo	72	17	1	10	NA	912
Ghana	32	65	0	3	NA	882
Senegal	25	50	6	18	3	761
Sudan	13	80	3	4	NA	486
Mauritania	32	65	0	2	NA	433
Ethiopia	3	96	0	1	NA	374
Tanzania	6	75	3	15	NA	373
NIGER	***76***	***20***	***1***	***3***	***NA***	***369***
Togo	69	23	1	8	NA	334
Malawi	0	83	5	12	NA	301
Uganda	4	96	0	0	NA	298
Madagascar	14	70	3	13	3	282
Mali	0	70	2	29	NA	255
Burkina Faso	0	98	1	1	0	249
Benin	36	38	7	19	NA	225
Central African Rep.	0	60	0	40	NA	132
Burundi	0	83	0	16	NA	123
Rwanda	9	90	0	2	NA	113
Sierra Leone	21	21	1	58	NA	106
Mozambique	3	89	NA	NA	NA	104
Somalia	0	95	0	5	NA	58

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 208-209, 204-205.

EXHIBIT 75

GROWTH OF EXPORT TRADE

Average Annual Growth Rate of Exports

Percent

1965-80	
NIGER	***12.8***
Congo	12.5
Nigeria	11.4
Mali	11.0
Gabon	8.1
Rwanda	7.7
Burkina Faso	6.8
South Africa	6.1
Cote d'Ivoire	5.6
Benin	5.2
Cameroon	5.2
Zaire	4.7
Togo	4.6
Liberia	4.5
Malawi	4.1
Somalia	3.8
Zimbabwe	3.4
Mauritius	3.1
Burundi	3.0
Mauritania	2.7
Senegal	2.4
Zambia	1.7
Madagascar	0.7
Kenya	0.3
Sudan	-0.3
Central African Rep.	-0.4
Ethiopia	-0.5
Ghana	-1.8
Sierra Leone	-3.8
Uganda	-3.9
Tanzania	-4.0

1980-88	
Ethiopia	-0.7
Tanzania	-5.4
Malawi	3.3
Somalia	-9.7
Zaire	-2.9
Madagascar	-3.5
Burkina Faso	6.5
Mali	7.0
Burundi	8.4
Uganda	2.6
Nigeria	-3.6
Zambia	-3.7
NIGER	***-4.9***
Rwanda	1.3
Kenya	0.1
Togo	-0.3
Central African Rep.	0.1
Benin	2.4
Ghana	1.1
Mauritania	9.7
Sierra Leone	-3.2
Senegal	7.0
Zimbabwe	1.5
Cote d'Ivoire	1.5
Congo	4.6
Cameroon	6.8
Mauritius	12.1
South Africa	0.2
Gabon	-2.2

Source: World Bank. World Development Report 1990, Oxford University Press, New York, 1990; pp. 204-205.

EXHIBIT 76

STRUCTURE OF MERCHANDISE IMPORTS

(Percentage Share Of Merchandise Imports)

1988

	Food	Fuel	Other Primary Commo-dities	Mach. and Trnspt Eqptmt	Other M'fac-tures	Merch. Imports Million Of US$
South Africa	2	0	3	47	47	16664
Nigeria	18	2	6	31	43	6324
Kenya	11	22	4	31	31	1989
Zaire	23	3	6	31	36	1954
Cote d'Ivoire	18	15	3	27	37	1542
Cameroon	23	1	2	35	39	1484
Zimbabwe	8	6	3	35	48	1325
Sudan	7	19	2	36	36	1223
Tanzania	6	14	2	46	32	1185
Senegal	40	12	4	16	30	1147
Mauritius	17	9	4	16	53	1115
Ethiopia	5	23	3	34	36	1099
Ghana	8	17	3	36	37	1091
Gabon	22	2	3	36	37	998
Zambia	7	9	1	38	46	889
Mozambique	21	6	9	NA	NA	706
Burkina Faso	19	3	4	33	41	697
Congo	24	7	3	25	42	611
Uganda	6	9	2	45	38	518
Mali	13	16	1	43	26	513
NIGER	***21***	***8***	***20***	***30***	***32***	***430***
Benin	14	31	3	16	37	413
Malawi	6	6	2	44	41	412
Togo	34	5	10	21	31	411
Madagascar	5	33	3	37	22	382
Rwanda	11	21	7	28	33	370
Somalia	22	4	8	39	27	354
Mauritania	21	5	2	36	36	353
Central African Rep.	11	8	3	36	43	236
Burundi	11	5	4	19	62	165
Sierra Leone	23	8	4	19	46	156

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 206-207; 204-205.

EXHIBIT 77

GROWTH OF MERCHANDISE TRADE: IMPORTS

Average Annual Growth Rate of Imports

Percent

1965-80		1980-88	
Nigeria	15.2	Mauritius	8.7
Gabon	10.5	Ethiopia	7.2
Rwanda	8.7	Rwanda	5.8
Togo	8.6	Uganda	4.6
Cote d'Ivoire	8.0	Mali	3.7
Benin	6.7	Central African Rep.	3.5
NIGER	***6.6***	Senegal	2.8
Mauritius	6.4	Benin	2.7
Mali	6.2	Cameroon	2.5
Somalia	5.8	Mauritania	2.4
Burkina Faso	5.8	Burkina Faso	2.2
Cameroon	5.6	Burundi	1.1
Mauritania	5.4	Gabon	0.8
Senegal	4.1	Tanzania	0.5
Malawi	3.3	Zaire	0.2
Sudan	2.3	Kenya	-0.6
Burundi	2.0	Ghana	-1.4
Kenya	1.7	Madagascar	-1.8
Tanzania	1.6	Cote d'Ivoire	-2.2
Liberia	1.5	***NIGER***	***-2.4***
Congo	1.0	Malawi	-3.4
South Africa	0.1	Togo	-3.8
Madagascar	-0.4	Somalia	-4.1
Ethiopia	-0.9	Zambia	-4.8
Ghana	-1.4	Zimbabwe	-6.0
Zimbabwe	-1.8	South Africa	-6.6
Sierra Leone	-2.7	Liberia	-9.8
Zaire	-2.9	Sierra Leone	-13.1
Uganda	-5.3	Nigeria	-13.7
Zambia	-5.5		

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 204-205.

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EXHIBIT 78

OFFICIAL DEVELOPMENT ASSISTANCE

Net Disbursements From All Sources
Millions Of Dollars

	1981	1982	1983	1984	1985	1986	1987	1988
Sudan	632	740	96[illegible]	622	1,128	945	902	918
Tanzania	703	684	594	558	487	681	882	978
Mozambique	144	208	211	259	300	422	649	886
Ethiopia	245	200	339	364	715	636	635	970
Senegal	398	285	323	368	295	567	624	568
Zaire	394	348	315	312	325	448	621	580
Somalia	374	462	343	350	353	511	580	433
Kenya	449	485	400	411	438	455	565	808
Zambia	232	317	217	239	328	464	429	478
Ghana	145	141	110	216	203	371	373	474
Mali	230	210	215	320	380	372	364	427
NIGER	***194***	***257***	***175***	***161***	***304***	***307***	***348***	***371***
Madagascar	234	242	183	153	188	316	327	305
Zimbabwe	212	216	208	298	237	225	295	273
Burkina Faso	217	213	184	189	198	284	282	298
Malawi	137	121	117	158	113	198	276	366
Uganda	136	133	137	163	182	198	276	359
Cote d'Ivoire	124	137	156	128	125	186	254	439
Rwanda	153	151	150	165	181	211	243	253
Guinea	106	90	68	123	119	175	214	262
Cameroon	199	212	129	186	159	224	213	284
Chad	60	65	95	115	182	165	198	264
Burundi	121	127	140	141	142	187	192	187
Mauritania	214	187	176	175	207	221	178	184
Central Africa Rep.	102	90	93	115	104	139	173	196
Botswana	97	101	104	102	96	102	154	151
Congo	81	93	108	98	71	110	152	89
Benin	82	81	86	77	96	102	154	162
Togo	63	77	112	110	114	174	123	199
Lesotho	104	93	108	101	94	88	108	108
Gabon	44	62	64	76	61	79	82	106
Liberia	108	109	118	133	90	97	78	65
Nigeria	41	37	48	33	32	59	69	120
Sierra Leone	60	82	66	61	66	87	68	102
Mauritius	58	48	41	36	28	56	65	59

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 216-217.

EXHIBIT 79

PER CAPITA OFFICIAL DEVELOPMENT ASSISTANCE

Net Disbursements Of ODA From All Sources
Per Capita In Dollars

	1988
Botswana	127.7
Gabon	98.3
Mauritania	96.6
Senegal	81.2
Somalia	73.4
Central African Rep.	68.4
Lesotho	64.4
Zambia	63.3
Mozambique	59.3
Togo	58.9
Mauritius	56.4
Mali	53.5
NIGER	***51.1***
Chad	48.9
Malawi	46.0
Congo	41.5
Tanzania	39.6
Cote d'Ivoire	39.1
Rwanda	38.0
Burundi	36.5
Benin	36.3
Kenya	36.0
Burkina Faso	34.9
Ghana	33.9
Zimbabwe	29.3
Madagascar	28.0
Sierra Leone	26.0
Cameroon	25.4
Uganda	22.1
Ethiopia	20.5
Zaire	17.4
Nigeria	1.1

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 216-217.

EXHIBIT 80

OFFICIAL DEVELOPMENT ASSISTANCE AS A SHARE OF GNP

Net Disbursements Of ODA From All Sources
As A Percentage of GNP

1988

Mozambique	70.6
Somalia	42.9
Tanzania	31.2
Malawi	30.6
Chad	28.8
Lesotho	26.3
Mali	22.0
Mauritania	18.4
Central African Rep.	17.5
Ethiopia	17.4
Burundi	17.1
Madagascar	16.2
Burkina Faso	16.0
NIGER	***15.5***
Togo	14.7
Zambia	12.0
Senegal	11.4
Rwanda	11.0
Kenya	9.4
Ghana	9.1
Zaire	9.0
Benin	9.0
Uganda	8.4
Botswana	7.8
Cote d'Ivoire	4.5
Zimbabwe	4.3
Congo	4.1
Gabon	3.2
Mauritius	3.0
Cameroon	2.2
Nigeria	0.4

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 216-217.

EXHIBIT 81

EXTERNAL PUBLIC DEBT

Total Long Term External Public Debt
Outstanding and Disbursed

Millions of Dollars

1970	
Zambia	653
Nigeria	567
Ghana	498
Kenya	406
Guinea	312
Zaire	311
Ivory Coast	266
Tanzania	265
Mali	238
Ethiopia	169
Liberia	158
Cameroon	140
Uganda	138
Senegal	131
Congo	124
Malawi	122
Gabon	91
Madagascar	89
Somalia	77
Sierra Leone	59
Benin	41
Togo	40
Chad	33
Mauritius	32
Mauritania	27
Central African Rep.	24
Burkina Faso	21
Botswana	17
Lesotho	8
Burundi	7
Rwanda	2

1988	
Mozambique	4,039
Ethiopia	2,790
Chad	300
Tanzania	4,100
Malawi	1,193
Somalia	1,754
Zaire	7,013
Madagascar	3,317
Burkina Faso	805
Mali	1,928
Burundi	749
Uganda	1,438
Nigeria	28,967
Zambia	4,194
NIGER	***1,542***
Rwanda	585
Kenya	4,869
Togo	1,067
Central African Rep.	584
Benin	904
Ghana	2,270
Lesotho	270
Mauritania	1,823
Sierra Leone	510
Senegal	3,019
Zimbabwe	2,281
Cote d'Ivoire	11,788
Congo	4,098
Botswana	494
Cameroon	3,366
Mauritius	709
Gabon	2,128

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 222-223.

EXHIBIT 82

DEBT SERVICE AS A SHARE OF EXPORTS

Service On External Public Debt
As A Percentage Of Exports
Of Goods And Services

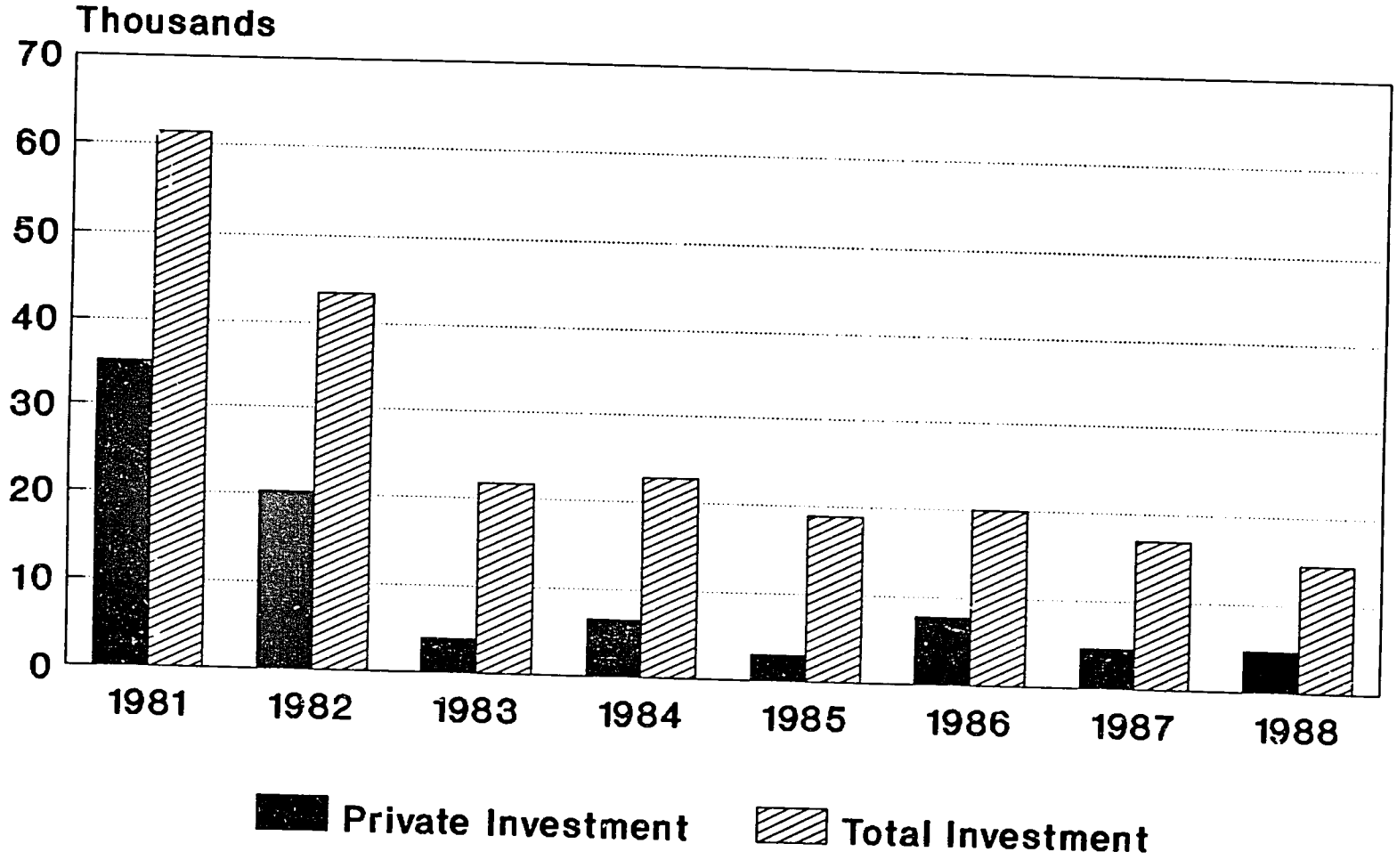
1988

Madagascar	39.9
Ethipia	37.4
Congo	28.7
Burundi	25.1
Zimbabwe	24.8
Nigeria	24.2
Mauritania	21.6
NIGER	***21.1***
Ghana	19.7
Kenya	19.4
Senegal	18.4
Togo	18.3
Malawi	17.2
Tanzania	17.1
Mali	14.2
Zambia	14.2
Uganda	14.0
Cote d'Ivoire	13.0
Burkina Faso	11.9
Cameroon	11.9
Mauritius	10.1
Rwanda	9.6
Mozambique	7.8
Zaire	6.9
Gabon	6.2
Central African Rep.	5.9
Sierra Leone	5.9
Benin	5.4
Lesotho	5.2
Somalia	4.9
Botswana	4.0
Chad	2.7

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990: pp. 224-225.

EXHIBIT 83

PRIVATE INVESTMENT:1981-1988 (mil. FCFA)



Source: Ann Stat, Comptabilite Nat'le

EXHIBIT 84

EVOLUTION DE LA F.B.C.F DU SECTEUR MODERNE

en millions F.cfa

N° Br CITI	-	1981	1982	1983	1984	1985	1986	1987	1988
	TOTAL Br	61412	43427	21801	22764	18948	19944	16933	14466
	dont:publi	26293	23137	17918	16290	15931	12282	12335	9761
	privé	35119	20290	3883	6474	3017	7662	4598	4705
I	dont:publi	45	45	27	0	-4	0	0	8
	privé	0	0	0	-10	-7	-10	0	0
II	dont:publi	4215	6133	6587	1933	3137	3845	5641	4738
	privé	292	1102	-3593	-88	417	3242	520	150
III	dont:publi	217	295	208	326	1716	1287	412	478
	privé	2474	2343	2668	2185	582	530	1267	297
IV	dont:publi	16444	7550	3849	8123	5890	2807	2621	2936
	privé	0	0	0	0	0	0	0	0
V	dont:publi	656	826	35	1134	758	-384	493	477
	privé	3358	7835	459	-313	158	3038	153	2541
VI	dont:publi	895	2605	1823	558	868	334	1117	473
	privé	9120	2510	1950	2690	1631	129	-667	228
VII	dont:publi	2441	3160	2470	1293	1104	3656	1779	353
	privé	1788	2952	250	757	616	108	1301	-421
VIII	dont:publi	1380	2503	2925	2919	2462	737	263	366
	privé	1763	3408	2061	1097	-453	729	2048	-470
IX	dont:publ.	0	0	0	0	0	0	0	0
	privé	229	140	69	156	73	-74	-64	2

Source: Service de la Comptabilité Nationale

EXHIBIT 85

GROSS DOMESTIC SAVINGS AS A SHARE OF GDP

1988

Gabon	33
Mauritius	25
South Africa	25
Zimbabwe	24
Kenya	22
Cote d'Ivoire	22
Congo	20
Sierra Leone	17
Nigeria	15
Zambia	14
Togo	14
Cameroon	14
Mauritania	10
Senegal	9
Malawi	8
Zaire	8
Madagascar	8
Rwanda	6
Ghana	6
Burundi	5
Uganda	5
Ethiopia	4
NIGER	***4***
Somalia	3
Benin	0
Central African Rep.	-1
Burkina Faso	-4
Mali	-4
Tanzania	-5
Chad	-12
Mozambique	-15
Lesotho	-73

Source: World Bank. World Development Report 1990, Oxford University Press, New York, 1990; pp. 194-195.

EXHIBIT 86

GROSS DOMESTIC INVESTMENT AS A SHARE OF GDP

Percent

1988

Lesotho	47
Somalia	34
Mozambique	33
Gabon	27
Kenya	26
Burkina Faso	25
Mauritius	25
Congo	22
Tanzania	21
Togo	21
Zimbabwe	21
South Africa	20
Burundi	18
Mauritania	18
Cameroon	17
Ethiopia	16
Malawi	16
Madagascar	16
Rwanda	16
Mali	15
Cote d'Ivoire	14
Uganda	13
Nigeria	13
Chad	12
Central African Rep.	12
Benin	12
Ghana	12
Zaire	11
Zambia	11
Sierra Leone	11
NIGER	***10***
Senegal	8

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 194-195.

EXHIBIT 87

Tableau n°4.01: Indicateurs démographiques.

INDICE	Unité	PERIODE	
		1977(1)	1988(2)
Taux brut de natalité	°/oo	52	52
Taux brut de mortalité	°/oo	25	19
Taux d'accroissement naturel	%	2,7	3,4
Temps de doublement de la population	ans	26	22
Espérance de vie à la naissance (les 2 sexes)	ans	...	47,7
Taux de mortalité infantile	°/oo	200	134
Population urbaine	%	13	15,3
Taux de scolarisation	%	17,3	29,1 (3)

Sources: (1) Plan quinquennal 1979-1983
(2) Recensement général de la population 1988 echantillon 10% .
(3) Annuaire des statistiques scolaires.
... Information non disponible.

EXHIBIT 88

Tableau n°4.10: Scénarios pour le futur- Estimation de la population masculine d'âge productif (15-64 ans).
(en milliers).

Année / Scénario	1985	1990	1995	2000	2005	2010	2015	2020	2025
FECEL	1.588	1.840	2.143	2.515	2.971	3.534	4.210	5.029	6.005
FECMOY	1.588	1.840	2.143	2.515	2.971	3.522	4.167	4.920	5.756
FECBAS	1.588	1.840	2.143	2.515	2.959	3.481	4.047	4.624	5.160

Sources: U.E.D.D.- Groupe Ressources Humaines/Préparation du Plan.

Tableau n°4.11: Scénarios pour le futur- Estimation de la population féminine d'âge productif (15-64 ans).

(en milliers)

Année / Scénario	1985	1990	1995	2000	2005	2010	2015	2020	2025
FECEL	1.622	1.877	2.191	2.573	3.042	3.621	4.313	5.150	6.148
FECMOY	1.622	1.877	2.191	2.573	3.042	3.609	4.270	5.041	5.900
FECBAS	1.622	1.877	2.191	2.573	3.030	3.567	4.148	4.742	5.297

Sources: U.E.D.D.- Groupe Ressources Humaines/Préparation du Plan.

Tableau n°4.12: Scénarios pour le futur- Estimation
de la population scolarisable (7-12 ans)

(en millions)

Année / Scénario	1985	2000	2015
FECEL	1,04	1,73	2,91
FECMOY	1,04	1,72	2,66
FECBAS	1,04	1,67	2,07

Sources: U.E.D.D.- Groupe Ressources Humaines/Préparation du Plan.
N.B.- FECEL: Fécondité élevée.
- FECMOY: Fécondité moyenne.
- FECBAS: Fécondité basse.

DES SCIENCES ECONOMIQUES
ET JURIDIQUES - BP 21
Tél. : 73.29.29
NIAMEY - NIGER.

EXHIBIT 89

ETUDE SUR L'ASSOCIATION COMMERCIALE NIGERIENNE 1990

Liste des associations commerciales

1. Syndicat des commerçants importateurs et exportateurs du Niger
2. Syndicat national des petites et moyennes entreprises du Niger
3. Syndicat National des commerçants nigériens
4. Syndicat des importateurs de bois et contre-plaqués
5. Syndicat des commerçants import-export, grossistes
6. Syndicat des exportateurs de bétail
7. Syndicat des vendeurs de céréales
8. Syndicat des vendeurs de chaussures
9. Syndicat des vendeurs de colas
10. Syndicat des bouchers
11. Syndicat des détailleurs
12. Syndicat des garagistes
13. Syndicat des exploitants de salles de cinéma
14. Association des professionnels du tourisme et hôtellerie
15. Syndicat des bijoutiers or et argent
16. Syndicat des dépanneurs radio
17. Syndicat des tailleurs
18. Syndicat des propriétaires de taxi
19. Syndicat des boulangers
20. Association des exploitants de bois de chauffage de la Commune de Niamey.
21. Syndicat des imprimeurs de Niamey
22. Syndicat national des menuisiers métallique - bois et tapissiers
23. Syndicat national des propriétaires d'auto-écoles

24. Syndicat des gérants de station d'essence

25. Association des barbiers et coiffeurs du Niger

26. Association des femmes commerçantes et entrepreneurs du Niger

27. Association interprofessionnelle des transitaires du Niger

28. Association nationale des artistes peintres du Niger

29. Association des forgerons, ferblantiers et fondeurs de marmites de Katako

30. Coopérative des métiers d'art du Niger

31. Coopérative des tanneurs traditionnels

32. Syndicat patronal des entreprises et industriels du Niger

33. Comité des assureurs du Niger

34. Association des Puisatiers du Niger (A.P.R.N.)

35. Centre d'étude et d'information sur les initiatives et résultats des petites opérations de développement du Sahel.

36. Comité des assureurs du Niger

37. Syndicat des vendeurs de pneus

38. Coopérative des artisans du musée national

39. Association des professionnels de banques

40. Syndicat des transporteurs du Niger.

EXHIBIT 90

LISTE DES ASSOCIATIONS PROFESSIONNELLES ET MEMBRES DES PRINCIPAUX RESPONSABLES

1°) SCIMPEXNI (Syndicat des Commerçants Importateurs et Exportateurs du Niger BP 335 Niamey

Président Manutention BP 10 337 Niamey Tel 73 30 21 (Moncie GARIBALDI)

Vice Président : WALLART Peyrissac) Tel : 73 42 95

2°) SPEIN (Syndicat Patronal des Entreprises et Industries du N

BP 135 Niamey Tél : 72.30.65

Président : AMADOU OUSMANE Directeur Transniger BP 10 454 Ni Tel : 7

1° Vice Président : (COMINAK) BP 10 545 Niamey Tel : 73 45

Secrétaire Général : Mme SINGH (Niger Car) BP 715 Niamey Tél : 73 23 31.

3°) SYNAPEMEIN : (Syndicat National des Petites et Moyennes Entreprises du Niger BP 11 224 Niamey Tél : 73 29 05

Président : ALI SOUMANA (Samaria gondel) BP 10 542 Niamey Tel : 72.36.32

Vice Président : WAZIR MALAM BP 336 Niamey - Tél : 74.07.17

Secrétaire Général : ZEZI BOUBACAR Tél : 73 50 45

4°) SYNDICAT NATIONAL DES TRANSPORTEURS BP 4273 : Tel : 73 3

Président : BONTO FARMO Tél : 73 [illegible] - Domicile : 73 36 [illegible]

Vice Président : DOUZOU OUSMANE - Tel : 73 43 31

Secrétaire Général : ISSA HASSIMI

Secrétaire Permanent : Tel 73 [illegible]

5°) SYNDICAT NATIONAL DES COMMERCANTS NIGERIENS

Président : HASSAN GARBA dit Badié Toudou - Tel : 73 41 11 ou 74 09 36

Secrétaire Général : MOUSTAPHA KAPKI (Niamey) Tel : 74 04 33

Secrétaire Général Adjoint : MADRAN ISSOUFOU - Tel : 73 35 [illegible]

Trésorier Général : BOUBACAR IDE DIT KIO - Tel : 73 [illegible] 40 ou 74 09 08

Secrétaire Permanent : Tél : 73 33 30.

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a) Ce bureau a été constitué par une Assemblée Générale de re sentants des Bureaux Départementaux dont les Présidents sont Vice Présidents au niveau national. Ainsi pour :

- AGADEZ : Amani Insani S/C Préfet
- DIFFA : Attip Boukari S/C Prefet - Tel 54 02 10
- DOSSO : HIMA ZARAFI S/C PREFET
- MARADI : Balla Kalto S/C Chambre de Commerce BP 79 Tel : 410 314
- NIAMEY : Hassan Sidi
- TAHOUA : Issa Oulé S/C prefet
- ZINDER : Mamani Issa Matamèye S/C Prefet

b) Au niveau de Niamey. Neuf syndicats sectoriels ont été fonmé Ces syndicats sont ainsi composés :

6°) <u>SYNDICAT DES IMPORTATEURS DE BOIS ET CONTRE PLAQUES</u>

- Président : ELHADJI IDRISSA MOUNKEILA CISSE BP 10 562 Niamey Tel : 73 53 26

Vice Président : ELHADJI KODO SOUNA BP 10 286 Niamey - Tel : 73
Secrétaire Général : NABRAN ISSOUFOU BP 11 456 Niamey - Tel : 73
Trésorier Général : ELHADJI SALOU SAIDOU

7°) <u>SYNDICAT DES COMMERCANTS IMPORT EXPORT, GROSSISTES</u>

Président : ELHADJI HASSAN GARBA DIT BADJE - Tel : 73 41 11
1er Vice Président : ELH HASSAN SIDI MOHAMED - Tel : 73 33 26
2è Vice Président : ELHADJI SEYNI SANDA - Tel : 73 24 71
Secrétaire Général : MOUSSA ADAMOU - Tel : 73 31 30

8°) <u>SYNDICAT DES GERANTS DE STATIONS D'ESSENCE</u>

Président : ELHADJI AMADOU BAGNOU (Station BP Près DIAO) Tel : 73 39 79
Vice Président : HAROUNA SEYDOU (Texaco Maourey)
Secrétaire Général : ELHADJI BOUBACAR BAGOURME (Total). Marché
Trésorier Général : Maman Ali

- Président : ELH. HIMA AMADOU KANARE Tel : 73 53 90
- Vice Président : ELH. ISSOUFOU BALLA
- Secrétaire Général : ELH. ADAMOU SANDA
- Trésorier Général : ELH. ISSAKA DROUHAMANE

10°) SYNDICAT DES VENDEURS DE CEREALES

- Président : ELH. HABI KOUNTCHE -marché céréales près C.C.O.G)
- Vice Président : DAOUDA YACOUBA
- Secrétaire Général : ELHADJI HALIDOU HASSAN
- Trésorier Général : ADDOU BOUBA

11°) SYNDICAT DES VENDEURS DE CHAUSSURES

- Président : IDRISSA DJINGAREY DIT ARKOUSSOU
- Vice Président : HASSIMI YACOUBA
- Secrétaire Général : HASSANE MAIROGO
- Trésorier Général : HALIDOU DOUDOU

12°) SYNDICAT DES COMMERCANTS DE COLAS

- Président : ELHADJI MAHAMADOU ADAMOU
- Vice Président : SAIBOU HIMA dit Baba Saïbou
- Secrétaire Général : SOUMAILA BOUBACAR
- Trésorier Général : ELH. MAHAMADOU ABDOURAHAMANE

13°) SYNDICAT DES BOUCHERS

- Président : NOUHOU AMADOU dit Yokoï
- 1er Vice Président : IBRAHIM DJIDO
- 2è Vice Président : BAWA CHEFFOU
- Secrétaire Général : NAMADINA ALTINE
- Trésorier Général : ABOUBACAR IDRISSA

14°) SYNDICAT DES DETAILLANTS

- Président : HAMADOU SALEY DIT
- 1er Vice Président : HASSAN MAMOUDOU dit Tawaï Liboré
- 2è " " : BOZARI CHEKARAOU
- Secrétaire Général : HAMADOU SADOU DIT MAIDANDA

- Président : OUMAROU BONKANO Tél : 73 39 21
- Vice Président : ADAMOU HAROUNA (Hamadallaye meubles) Tel 73 32 61
- 2è " " : MOUMOUNI SEYNI DIT DENDI
- 3° " " : BEIDARI MOUSSA
- Secrétaire Général :BOUBACARALI BP 2266 Tél : 73 25 16
- Trésorier : YAHAYA OUMAROU Tél : 73 26 09

16°) SYNDICAT DES EXPLOITANTS DE SALLES DE CINEMA

- Président : ELHADJI MOUNKEILA YACOUBA (Soni Ali Ber Niamey Tel 73 59 BP 445 Niamey
- Vice Président : ELH. ATTA AYE (Cinéma Sahel) AGADEZ Tel : 410 140
- Secrétaire Général : EL. LAWALI DAN AZOUMI (Studio Vox) BP 459 Tel : 73 37 69
- Trésorier Général : ELH. MAMANE DJITAOU (Dan Kassawa Maradi) Tel : 410 383 MDI

17°) ASSOCIATION DES PROFESSIONNELS DU TOURISME

- Président : ALI MADOUGOU (complexe Namaro) Tel : 73 30 63
- Vice Président : FRANKINI (Cascade) Tel : 73 20 32
- Secrétaire Général : Mme ADIZA MOUSSA GROS (Hôtel Ténéré) TEL 73 39
- Trésorier Général : MOUSTAPHA KADRI - Tel 740 465

18°) SYNDICAT DES BIJOUTIERS OR ET ARGENT

- Président : SAMBA HAMANI
- vice Président : AGACK MOHAMED
- Secrétaire Général : MAHAMADOU NASSAMOU
- Trésorier Général : ADAMOU SORI

19°) SYNDICAT DES DEPANNEURS RADIO

- Président : LAWALI BARA (atelier quat. Banizoumbou)
- Vice Président : HASSANE ADAMOU
- Secrétaire Général : MOUSSA GALADIMA
- Trésorier : NO[illegible]OU OUMAROU dit TABAZAGA

20°) SYNDICAT DES TAILLEURS

- Président : HAMIDOU DIOFFO
- Vice Président : ADAMOU ALLICHINA.

ASSOCIATION PROFESSIONNELLE DES BANQUES

- Président : BDRN Tél : 73 40 43 - 50.97 - 51.10

22°) GROUPEMENT PROFESSIONNEL DES PETROLIERS

- Président : BP NIGER TEL 73 20 51
- Vice Président :

23°) COMITE DES ASSURANCES

- Président : ALMA Directeur Général LEYMA Tel : 73 55 74

24°) SYNDICAT DES TAXIS

- Président GARBA MOUNKAILA dit Dallé

25°) SYNDICAT DES BOULANGERS

- Président : TAHIROU TALATOU Tel : 73 50 16 ou 73 54 30
- Vice PRESIDENT : ELHADJI LAWALI DAN AZOUMI ZINDER Tel : 51.04.06

Secrétaire Général : DOUZIDI Tél : 73 30 27

26°) ASSOCIATION SYNDICALE DES EXPLOITANTS DE BOIS DE NIAMEY

- Président : Sergent en retraite MAMAN ABDOU
- 1er Vice Président : KOURA GANDJI
- 2è Vice Président : ADAMOU SIDDO
- Secrétaire Général : MACHERAL DES LOGIS EN RETRAITE ADAMOU SEYDOU

27°) SYNDICAT DES IMPRIMEURS DE NIAMEY

- Président : ELHADJI AMADOU BAGNOU (impri eric Arts graphiques) Tel : 73 39 79
- Vice Président : ELH HIMA YANKORI (imprimerie SABOUA) Tel 73 33 3
- Secrétaire Général : NA ALLAH GOUZAYE (Publi Service) Tel : 73 56
- Trésorier Général : OUSMANE GARBA (nigerienne) Tel : 73 36 17

Niamey, le 20 MAI 1988

150'

EXHIBIT 91

LIFE EXPECTANCY AT BIRTH

Years

1988

Botswana	67
Mauritius	67
Zimbabwe	63
South Africa	61
Kenya	59
Lesotho	56
Cameroon	56
Ghana	54
Tanzania	53
Zambia	53
Togo	53
Cote d'Ivoire	53
Congo	53
Gabon	53
Zaire	52
Nigeria	51
Benin	51
Madagascar	50
Central African Rep.	50
Burundi	49
Rwanda	49
Mozambique	48
Uganda	48
Senegal	48
Ethiopia	47
Malawi	47
Somalia	47
Burkina Faso	47
Mali	47
Chad	46
Mauritania	46
NIGER	***45***
Sierra Leone	42

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 178-179.

EXHIBIT 92

INFANT MORTALITY
Deaths Per 1,000 Live Births

	1965
Sierra Leona	210
Mali	207
Madasgascar	203
Malawi	201
Guinea	197
Burkina Faso	195
Chad	184
NIGER	***181***
Mozambique	180
Mauritania	180
Nigeria	179
Senegal	172
Central African Rep.	169
Benin	168
Ethiopia	166
Somalia	166
Sudan	161
Togo	156
Gabon	155
Ivory Coast	150
Cameroon	145
Lesotho	143
Burundi	143
Zaire	142
Rwanda	141
Tanzania	139
Liberia	139
South Africa	125
Zambia	123
Uganda	122
Ghana	121
Congo	121
Kenya	113
Botswana	113
Zimbabwe	104
Mauritius	64

	1988
Mozambique	139
Ethiopia	135
Chad	130
Tanzania	104
Malawi	149
Somalia	130
Zaire	96
Madagascar	119
Burkina Faso	137
Mali	168
Burundi	73
Uganda	101
Nigeria	103
Zambia	78
NIGER	***133***
Rwanda	120
Kenya	70
Togo	92
Central African Rep.	102
Benin	115
Ghana	88
Lesotho	98
Guinea	143
Sierra Leone	152
Senegal	78
Zimbabwe	49
Cote d'Ivoire	95
Congo	117
Botswana	41
Cameroon	92
Mauritius	22
South Africfa	70
Gabon	101

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 232-233.

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EXHIBIT 93

MATERNAL MORTALITY RATES

Per 100,000 Live Births

1980	
Ethiopia	2,000*
Benin	1,680*
Nigeria	1,500
Somalia	1,100
Ghana	1,070*
Zaire	800*
Chad	700
Sudan	607*
Central African Rep.	600
Burkina Faso	600
South Africa	550
Senegal	530*
Kenya	510*
Mozambique	479*
Togo	476*
Sierra Leone	450
NIGER	***420****
Tanzania	370*
Cameroon	303
Uganda	300
Botswana	300
Madagascar	300
Malawi	250
Rwanda	210
Liberia	173
Zimbabwe	150*
Gabon	124*
Mauritania	119
Zambia	110
Mauritius	99

*Figures refer to maternal mortality only in hospitals and other medical institutions.

Source: World Bank, World Development Report 1989, Oxford University Press, New York, 1989; pp. 226-227.

EXHIBIT 94

HEALTH CARE: PHYSICIANS CARE
Population Per Physician

	1965	1984
Ethiopia	70,190	77,360
Guinea	54,430	57,390
Burkina Faso	73,960	57,180
NIGER	***65,540***	***38,770***
Chad	72,480	38,360
Mozambique	18,000	37,950
Rwanda	72,480	34,680
Mali	51,510	25,390
Central African Rep.	34,020	23,070
Uganda	11,110	21,900
Burundi	55,910	21,120
Lesotho	20,060	18,610
Somalia	36,840	16,090
Benin	32,390	15,940
Ghana	13,740	14,890
Sierra Leone	16,840	13,630
Senegal	21,130	13,450
Mauritania	36,470	12,110
Malawi	47,320	11,560
Sudan	23,500	10,110
Kenya	13,280	10,100
Madagascar	10,620	10,000
Liberia	12,360	9,240
Togo	23,240	8,720
Congo	14,210	8,140
Nigeria	29,530	7,980
Zambia	11,380	7,100
Botswana	27,460	6.910
Zimbabwe	8,010	6,700
Gabon	NA	2,790
Mauritius	3,930	1,900
Zaire	35,130	NA
Cameroon	26,720	NA
Cote d'Ivoire	20,640	NA
South Africa	2,050	NA
Tanzania	21,700	NA

Source: World Bank, World Development Report 1989, Oxford University Press, New York, 1989; pp. 218-219.

EXHIBIT 95

BIRTHS ATTENDED BY HEALTH CARE STAFF

Percent

1985

Mauritius	90
Tanzania	74
Ghana	73
Zimbabwe	69
Madagascar	62
Malawi	59
Ethiopia	58
Botswana	52
NIGER	***47***
Benin	34
Lesotho	28
Mozambique	28
Mali	27
Sierra Leone	25
Mauritania	23
Cote d'Ivoire	20
Sudan	20
Togo	15
Burundi	12
Somalia	2

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 232-233.

EXHIBIT 96

HEALTH CARE: NURSING CARE

Population Per Nursing Person

	1965	1984
Guinea	4,750	6,380
Mozambique	5,370	5,760
Ethiopia	5,970	5,290
Rwanda	7,450	3,650
Chad	13,610	3,390
Malawi	NA	3,130
Burundi	7,320	3,040
Central African Rep.	3,000	2,170
Senegal	2,640	2,090
Uganda	3,130	2,060
Benin	2,540	1,750
Burkina Faso	4,150	1,680
Somalia	3,950	1,530
Liberia	2,290	1,360
Mali	3,360	1,350
Sudan	3,360	1,250
Togo	4,990	1,240
Mauritania	NA	1,200
Sierra Leone	4,470	1,090
Nigeria	6,160	1,020
Zimbabwe	990	1,000
Kenya	1,930	950
Zambia	5,820	740
Botswana	17,720	700
Ghana	3,730	640
Mauritius	2,030	580
Congo	950	570
NIGER	***6,210***	***450***
Gabon	760	270
Cameroon	5,830	NA
Lesotho	4,700	NA
Tanzania	2,100	NA
Cote d'Ivoire	2,000	NA
South Africa	490	NA
Madagascar	3,650	NA

Source: World Bank, World Development Report 1989, Oxford University Press, New York, 1989; pp. 218-219.

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EXHIBIT 97

Tableau n°5.06: Morbidité, maladies à déclaration contrôlée: cas, décès et taux de décès (nombre de décès pour 10 000 cas)

MALADIE	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988
Paludisme										
cas	389.873	385.009	395.459	407.105	378.462	338.413	516.994	625.056	418.539	785.515
décès	192	161	151	163	103	70	284	374	170	291
taux de décès	5	4	4	4	3	2	5	6	4	4
Diarrhées graves										
cas	16.223	9.257	5.883	7.199	8.358	10.231	12.168	12.338	11.860	14.315
décès	84	183	103	152	170	182	294	176	135	201
taux de décès	52	198	175	211	203	178	242	143	114	140
Rougeole										
cas	38.107	35.568	36.139	39.526	29.406	40.013	44.689	17.626	14.290	16.875
décès	447	235	433	486	430	487	1.117	312	149	194
taux de décès	117	66	120	123	146	122	250	177	104	115
coqueluche										
cas	7.399	8.320	5.735	3.920	7.296	6.427	5.261	8.372	4.626	3.622
décès	4	9	12	10	14	4	65	43	22	18
taux de décès	5	11	21	26	19	6	124	51	48	50
Varicelle										
cas	1.981	2.056	4.772	4.318	9.783	10.919	18.812	3.249	...	...
décès	-	-	1	3	1	1	10	4	...	...
taux de décès	-	-	2	7	1	1	5	12	...	...
Méningite										
cas	6.093	4.203	2.567	995	1.377	2.320	286	20.206	...	2.437
décès	309	293	187	110	75	75	23	790	...	140
taux de décès	507	697	728	1.106	545	323	804	391	...	574
Pneumonie										
cas	3.476	2.991	6.760	4.261	14.582	12.227	17.563	17.599	15.774	37.086
décès	26	23	50	45	35	54	74	102	35	21
taux de décès	75	77	133	106	24	44	42	58	22	6
Grippe										
cas	1.010	1.482	109	29	1.564	3.589	2.884	10.613	...	...
décès	1	-	-	-	1	1	3	3	...	...
taux de décès	10	-	-	-	6	3	10	3	...	...
Jaunisse										
cas	1.426	1.331	1.080	757	834	653	695	493	501	...
décès	37	38	31	34	18	12	24	21	25	...
taux de décès	259	285	287	449	216	184	345	426	499	...
Tétanos										
cas	310	343	313	261	210	173	115	222	285	297
décès	57	64	57	52	39	17	18	42	47	34
taux de décès	1.839	1.866	1.821	1.992	1.857	983	1.565	1.892	1.649	1.145
Poliomyélite aigüe										
cas	336	310	279	175	201	172	146	30	24	33
décès	8	7	6	6	4	7	2	2	1	-
taux de décès	238	226	215	343	199	407	137	667	417	-
Diphtérie										
cas	50	33	27	15	-	170	269	37	22	19
décès	4	3	5	4	-	2	1	6	3	-
taux de décès	800	909	1.852	2.667	-	118	37	1.622	1.364	-

Source : Annuaire Statistique

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EXHIBIT 98

Tableau no 6.01: Récapitulation générale, enseignements du premier et second dégré, normal et technique, public et privé; établissements, classes, enseignants et élèves (suite).

ANNEE	Etablissements			Classes			Enseignants			Elèves		
	Public	Privé	Total	Public	Privé	Total	Public	Privé	Total	Public	Privé	Total
ENSEIGNEMENT GENERAL DU SECOND DEGRE : Ensemble												
1981	61	13	74	794	129	923	...	...	...	31.647	4.863	36.510
1982	70	11	81	...	...	...	...	...	...	...	...	...
1983	71	14	85	...	...	...	...	...	...	...	...	...
1984	71	15	86	...	...	...	...	...	...	45.211	...	...
1985	72	19	91	...	...	...	...	...	...	46.874	...	...
1986	75	...	...	...	...	...	...	...	...	45.991	...	...
1987	77	21	98	1.160	146	1.306	2.032	...	...	41.240	5.974	47.214
1988	83	25	108	1.337	170	1.507	1.989	...	...	51.796	6.302	58.098
1989 *	84	21	105	1.276	228	1.504	2.065	...	...	56.107	7.272	63.379
ECOLES NORMALES												
1981	4	-	4	48	-	48	80	-	80	1.830	-	1.830
1982	5	-	5	...	-	...	...	-	...	...	-	...
1983	5	-	5	...	-	...	98	-	98	...	-	...
1984	5	-	5	...	-	...	...	-	...	...	-	...
1985	5	-	5	...	-	...	115	-	115	1.503	-	1.503
1986	5	-	5	...	-	...	130	-	130	1.706	-	1.706
1987	5	-	5	59	-	59	85	-	85	1.932	-	1.932
1988	5	-	5	55	-	55	...	-	...	1.864	-	1.864
1989 (1)	4	-	4	45	-	45	117	-	117	1.578	-	1.578
LYCEES TECHNIQUES												
1981	1	1	2	38	6	44	...	...	...	...	127	...
1982	1	1	2	23	15	38	...	...	...	474	410	884
1983	1	1	2	23	15	38	...	...	...	539	363	902
1984	1	1	2	23	15	38	...	...	...	554	291	845
1985	1	1	2	23	15	38	...	...	...	478	254	732
1986	1	1	2	21	15	36	...	...	...	402	200	602
1987	1	1	2	18	15	33	...	...	...	435	238	673
1988	1	1	2	28	15	43	...	...	...	506	287	793
1989	1	1	2	23	20	43	54	55	109	543	306	849
ENSEMBLE tous niveaux												
1981	1.745	42	1.787	6.291	265	6.556	...	...	...	...	11.993	...
1982	1.793	45	1.838	...	...	...	...	...	...	...	...	...
1983	1.762	41	1.803	...	...	...	...	...	...	...	...	...
1984	1.864	51	1.915	...	...	...	...	...	...	...	...	...
1985	1.878	54	1.932	...	...	...	...	...	...	296.574	...	...
1986	1.835	...	...	...	...	...	...	...	...	318.785	...	...
1987	2.012	64	2.076	8.276	375	8.651	...	...	...	330.100	17.967	348.067
1988	2.115	69	2.184	8.801	403	9.204	...	...	...	359.258	9.675	368.933
1989	2.206	60	2.266	9.032	433	9.465	10.172	...	...	375.658	16.737	392.395

* Il manque à ces chiffres les effectifs du Lycee Dan Baskore de Maradi et du Lycee Albéry Mortive [illegible]

(1) Ecole normale normale de Maradi

EXHIBIT 99

UNIVERSITY EDUCATION

Percentage of Age Group
Enrolled In Tertiary Education

1987

Congo	7
Gabon	5
Madagascar	4
Zimbabwe	4
Somalia	3
Togo	3
Benin	3
Mauritania	3
Senegal	3
Botswana	3
Cameroon	3
Zaire	2
Ghana	2
Ethiopia	1
Malawi	1
Burkino Faso	1
Mali	1
Burundi	1
Uganda	1
Zambia	1
NIGER	***1***
Kenya	1
Central African Rep.	1
Guinea	1
Mauritius	1

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 234-235.

EXHIBIT 100

FEMALE EDUCATION

Females Per 100 Males

	Primary		Secondary	
	1970	1987	1970	1987
Mozambique	NA	78	NA	54
Lesotho	150	125	111	153
Botswana	113	107	88	107
South Africa	98	NA	95	NA
Mauritius	94	98	66	92
Gabon	91	98	43	81
Madagascar	86	93	70	85
Zambia	80	NA	49	NA
Zimbabwe	79	NA	63	NA
Rwanda	79	97	44	35
Congo	78	95	43	76
Ghana	75	80	35	66
Cameroon	74	85	36	64
Kenya	71	93	42	70
Sierra Leone	67	NA	40	NA
Uganda	65	NA	31	NA
Tanzania	65	99	38	66
Senegal	63	69	39	51
Nigeria	59	NA	49	NA
Malawi	59	80	36	60
Zaire	58	NA	26	NA
Cote d'Ivoire	57	NA	27	44
Burkina Faso	57	59	33	46
Mali	55	59	29	42
NIGER	***53***	***NA***	***35***	***42***
Burundi	49	NA	17	NA
Central African Rep.	49	62	20	37
Ethiopia	46	61	32	63
Guinea	46	45	26	31
Togo	45	63	26	32
Benin	45	51	44	NA
Mauritania	39	70	13	44
Chad	34	40	9	18
Somalia	33	NA	27	NA

Source: World Bank, World Development Report 1990, Oxford University Press, New York, 1990; pp. 240-241.