



**DAC WORKSHOP: TOWARDS GOOD PRACTICES FOR DONORS ON
CAPACITY DEVELOPMENT FOR TRADE**

SENEGAL CASE STUDY

This document is submitted as background for discussion at the Workshop, to be held in Paris on 29-30 May 2000 and should be considered together with the background paper [DCD(2000)10].

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Acronyms

ACP	African Caribbean Pacific
ACBF	African Capacity Building Foundation
AERC	African Economic Research Consortium
CEPS	Customs and Excise Prevention Service (Ghana)
CET	Common External Tariff
CSP	Country Strategy Paper
DFID	Department for International Development
EC	European Commission
EDF	European Development Fund
ECOWAS	Economic Community of West African States
ESAF	Enhanced Structural Adjustment Facility
EU	European Union
FAO	Food and Agriculture Organisation of the United Nations
FDI	Foreign Direct Investment
GATT	General Agreement on Tariffs and Trade
GoS	Government of Senegal
IEPD	International Economic Policy Department (DFID)
IMF	International Monetary Fund
IT	Information Technology
ITC	International Trade Centre
NGOs	Non-Governmental Organisations
OHADA	Organisation pour l'Harmonisation du Droit des Affaires en Afrique
REPA	Regional Economic Partnership Agreement
TA	Technical Assistance
TC	Technical Co-operation
TRIPS	Trade Related aspects of Intellectual Property rights
UEMOA	Union Economique et Monétaire Ouest Africaine (West African Economic and Monetary Union)
UNCTAD	United Nations Conference on Trade and Development
URAs	Uruguay Round Agreements
USAID	United States Agency for International Development
WTO	World Trade Organisation

I. Economic Performance and Policy Review

A. Macroeconomic Environment

1. The Senegalese economy has responded positively to the 1994 CFA franc devaluation and subsequent structural reforms, with GDP growth above 5% from 1996 to 1998. The economy retains structural weaknesses, however. High transaction costs and weak infrastructure have undermined the competitiveness of the private sector. Education and health systems are very limited and foreign investment rates are too low to stimulate sustainable growth.

2. There was a surge in inflation immediately following the devaluation. Within a few years, however, inflation had dropped below 3%, thanks to prudent monetary policy conducted at the regional level by the Central Bank of the West African States. The real GDP growth rate was held above 5% from 1996 to 1998. The fiscal deficit has been reduced and there have been budget surpluses in recent years. The current account balance (excluding aid) improved throughout the late 1990s. Paris Club debt restructuring concluded in 1998 has contributed to this improvement, as have the increase in revenue collection and greater control over expenditures.

3. *Structural adjustment.* The CFA franc had substantially appreciated against the US dollar between 1986 and 1993, contributing to Senegal's poor export performance. The 50% devaluation in 1994 marked the beginning of a period of substantial reform for the government. Senegal was the first franc zone country to sign a stand-by agreement with the IMF following the devaluation. In 1994, the government and the IMF agreed on an ESAF loan program, which expired in 1998.

4. In April 1998, the government and the IMF signed an ESAF agreement for a three-year (1999-2001) program which totals SDR 107 million (\$142 million). Multilateral and bilateral donors subsequently pledged almost \$2 billion to support the ESAF program at the fourth Consultative Group meeting. Senegal's reform efforts are concentrated on restoration of the external balance, consolidation of public finances, and strengthening competitiveness. The IMF has praised Senegal for its reform record, but has urged the government to improve social indicators, most notably in health and education.

5. The World Bank has 18 ongoing IDA-financed operations in Senegal, valued at \$682 million, in the areas of agriculture, education, population/health/nutrition, power/energy/water, transportation/urban development, industry and private sector development.

6. *Governance.* A court of financial discipline has been established to monitor the management of public resources and sanction negligent offices. A civil service reform program has also been launched. It aims to improve government services and efficiency by linking promotions to merit.

7. *Sectoral reform.* Some of the key sectoral reform measures centre on privatisation of state-owned enterprises. In particular, the government plans on accelerating and deepening sectoral reforms in the agriculture, energy, and transport sectors.

8. *Private sector.* The business climate, in general, improved significantly during the 1990s. Privatisation started in 1994, with an ambitious program that targeted 22 government-owned enterprises for privatisation during the following three years. Concerns on unemployment and labour action interrupted the government's privatisation plans. By 1998, 12 privatisations had been completed. The government is now scheduled to withdraw completely from the private sector by the end of 2000, through total or partial liquidation of state-owned enterprises. In addition, steps have been taken to improve the

legal system through business law reform and the establishment of an arbitration court in the Dakar Chamber of Commerce.

9. Senegal has many professional organisations representing the business sector.¹ Aside from the large, inward-oriented, mostly foreign-owned industrial firms, a new generation of entrepreneurs is emerging, with looser links to the government than the former. However, their professional organisations, while quite vocal, remain relatively weak.² Professional associations, not firms, are members of the Chamber of Commerce.

10. Following the devaluation, the government became conscious of the piecemeal and bureaucratic nature of its framework for private sector development. Among other initiatives,³ a private sector capacity-building project (Projet de renforcement des capacités du secteur privé), was established. It had three components:

- The Private Sector Foundation (Fondation Secteur Privé, sponsored by the World Bank; see below) to support firms.
- The Legal Reform Committee (Comité de réforme juridique, CRJ).
- The Reflection Group on Competitiveness and Growth (Groupe de Réflexion sur la Compétitivité et la Croissance, GRCC; see below).

Despite the establishment of these institutions, implementation of the capacity-building project has been slow. A strategy paper was eventually published in 1999.⁴

B. Foreign Trade

Trade Structure and Performance

11. The 1994 devaluation favoured leading export industries like chemicals and fisheries. These industries are replacing exports of groundnuts and groundnut products as the chief source of foreign exchange. The tourism industry has gained as well from the devaluation. But higher levels of foreign investment did not materialise, as expected. Non-traditional exports for which Senegal may have a comparative advantage (e.g. fruits and vegetables) also failed to benefit from the devaluation.

12. The current account and trade balances have registered negative figures almost continuously since independence. The size of the trade deficit, which used to depend a great deal on the groundnut harvest, today fluctuates somewhat less due to the export diversification mentioned above. The current account balance has improved during the last half of the 1990s.

13. Senegal relies heavily on imports, including for basic staples, such as rice, which is mostly imported from Asia. Over the years, and partly due to the peg between the CFA franc and the French franc, consumption habits have been largely biased in favour of imported goods. This means that strong vested interests have been established in the importing sector. Exports remain concentrated in three main sectors. Fish accounts for 25 per cent of export earnings. Some 50 firms export it (fresh, frozen, conditioned),

¹ See République du Sénégal, 1999b.

² They are reported to cover only 50 per cent of their costs; see the 1999 Diagnostics report on Senegal.

³ Other government initiatives include a Lettre de Politique de Développement du Secteur Privé (LPDSP) was adopted in 1995, and a Projet d'Ajustement et de Compétitivité du Secteur Privé (PASCO).

⁴ République du Sénégal, 1999b.

mostly to Europe, and especially to France. Senegal's assets on these markets include proximity, with frequent flights allowing for high value-added fresh products to be regularly shipped by air. While Senegal's share of Europe's fish market may seem insignificant, it is a major supplier of certain types of fish (shrimp, tropical sole, rouget).⁵ Phosphates (rocks and processed) account for 22 per cent and groundnut products for some 10 per cent of exports.

Trade Institutions

14. Within the Ministry of Trade, the Directorate for External Trade (Direction du Commerce Extérieur, DCE) is in charge of defining Senegal's trade policy. Co-ordination with other ministries seems to have been boosted by preparations for the Seattle WTO Ministerial meeting. An Inter-Ministerial Committee was set up under the presidency of the Ministry of Trade (DCE), with six sub-committees covering agriculture, services, intellectual property, environment, goods, and investment. Meetings were held at the national and sub-regional level (in Burkina Faso), with the support of several donors (including the FAO and France).

15. Several public institutions in charge of promoting trade and investment have flourished over the years. There are four agencies in charge of investment promotion:

- Centre de Formalités des Entreprises (Guichet Unique, or "one-stop shop" for investors);
- SODIDA (Société du Domaine Industriel de Dakar);
- SONEPI (Société Nationale d'Etudes et de Promotion Industrielles);
- ZFID (Zone Franche Industrielle de Dakar), for export-oriented firms.

16. All four suffer from inadequate human and financial resources, as well as a passive attitude vis-à-vis investors.⁶ The Guichet Unique, for instance, which should have simplified and unified procedures is actually reported to have merely added another step on the investors' path. The ZFID dramatically failed to attract investors, and firms based in the SODIDA park hardly ever make it beyond its fences. Two other organisations are more specifically dedicated to trade promotion and facilitation:

- CICES (Centre International du Commerce Extérieur), which has been mainly active in organising trade fairs and exhibitions.
- The Trade Point Senegal, under responsibility of the DCE, which aims to facilitate procedures, ensure co-ordination among the many departments exporters have to deal with, and provide exporters with all necessary information. A major objective of the Trade Point program is to computerise all import and export procedures. Progress has been slow, however, due to the difficulty in implementing changes at the level of customs.

17. Finally, there are two institutions in charge of promoting quality and standards:

- Institut Sénégalais de Normalisation (ISN), which defines and controls national norms in each industry, assesses needs, and disseminates existing norms; limited impact is mainly blamed on the lack of an effective national policy in these areas.
- Institut de Technologie Alimentaire (ITA), which conducts R&D, controls products for local consumption, and trains in quality control; tends to focus on service delivery to food processing firms.

⁵ De Reviens et al., 1998, p.10.

⁶ See Document de stratégie du secteur privé, 1999, and FIAS, 1999.

Trade Policy and Strategy

18. Like many other developing countries, Senegal lacks a clear trade policy, embedded in a coherent development strategy. This is partly due to the fact that decisions in the area of trade policy have for a long time largely been a by-product of decisions made in other policy areas, a residual either of Senegal's monetary policy (the CFA/FF peg) or its financial and political priorities within the framework of the Lomé Convention. Trade policy decisions have also been made *ad hoc*, on the basis of particular challenges confronting private or state monopolistic firms in traditional sectors, either inward-oriented (cement, sugar, etc.) or outward-oriented (groundnut, phosphates, etc.). Finally, an overvalued CFA franc meant that the concern with food security did not need to be addressed through the active development of foreign exchange-earning activities. Trade therefore was not viewed as part and parcel of a general strategy aimed at fostering growth and alleviating poverty, and the set of incentives confronting domestic and foreign investors was strongly biased against exports.

19. Arguably, though, incentives may be changing: trade promotion and development started making more sense for policy makers after the January 1994 devaluation, and the subsequent reduction in the anti-export bias. Between 1996 and 2000, the debate over the renegotiation of Lomé, in the early phase of which the simple dismantling of ACP-EU trade agreements seemed a plausible scenario, and the run-up to the WTO Seattle meeting, helped push trade higher on the agenda of the government. Current thinking in the Ministry of Trade emphasises two main directions: an active promotion of export growth and diversification, and the gradual integration in the world economy through trade agreements at the sub-regional, regional (post-Lomé) and multilateral levels.

20. *Export promotion and diversification.* Senegal's IXth Plan calls for reconciling competitiveness and sustainable human development. Striking an optimal balance between the traditional objective of food security and seizing the largely under-tapped opportunities in world markets requires that more emphasis be put on encouraging small- and medium-sized enterprises (SMEs) to export. To that end, the DCE currently aims to streamline its trade promotion instruments by setting up a single agency that would absorb existing bodies. Controversies have arisen among the varied vested interests associated with the existing institutions (e.g., over whether investment and trade promotion should be separated), and these disputes are slowing down the process. The government has turned to CIDA and the ITC for support in designing and implementing this strategy (see below).

21. *Multilateral agreements.* Senegal has been a member of the WTO since 1995. It was one of the first African countries to accede to the GATT in 1963, and has participated in several major global trade rounds. During its most recent WTO Trade Policy Review, in 1994, Senegal was congratulated on its significant market access and services concessions during the Uruguay Round.

22. *Regional agreements.* Senegal is a member of two regional integration schemes, ECOWAS (created 1975) and UEMOA (created 1994; see box), both of which aim to establish free trade areas. Progress towards intra-regional trade liberalisation has been very slow within ECOWAS (see Jebuni, 1997), while UEMOA has proceeded speedily with its own agenda. UEMOA countries already have a common currency (the West African CFA franc; see Annex 2) and a common business legal framework set up under OHADA (Organisation pour l'Harmonisation du Droit des Affaires en Afrique). On January 1, 2000, UEMOA countries implemented a Common External Tariff, lowering the maximum tariff from 25% to 20%. The resulting revenue loss for Senegal will be partially compensated by the imposition of a 19% VAT in July 2000.

23. *ACP-EU trade agreements.* As an ACP Senegal has been enjoying non-reciprocal trade preferences from the EU for 25 years under the Lomé Convention. Senegal is no exception to the general observation that these preferences have had little impact on the integration of ACP economies in world

trade, mostly because pervasive supply-side constraints have prevented ACP exporters from taking advantage of preferential access to EU markets. One exception is the fisheries sector, where preferences arguably have been most useful; by contrast, exemption of MFA quotas did not help the textile and clothing sector. Moreover, the relative value of these preferences has been eroding in the face of multilateral trade liberalisation and the multiplication of preferential agreements between the EU and third countries. Unlike Mauritius or some Caribbean islands, Senegal has not benefited from any of the four, sometimes lucrative, commodity protocols attached to Lomé. Of all West African countries' exports to the EU, only bananas and a few products listed under Annex XL of the Lomé Convention are not liberalised. Among the latter are tomatoes, for which Senegal has a quota -- largely under-utilised -- of 560 tonnes.⁷

II. Trade Development Needs

Box 1

Regional integration: UEMOA and ECOWAS

Originally a monetary agreement, the UMOA (Union Monétaire Ouest-Africaine) turned itself into UEMOA (Union Économique et Monétaire Ouest-Africaine) in January 1994, with the aim of establishing a customs union. A common external tariff was put in place on January 1, 2000. The Union has regional institutions to coordinate economic policies, mainly through the adoption of budgetary convergence criteria.

UEMOA comprises two non-LDCs (Côte d'Ivoire and Senegal) and six LDCs (Benin, Burkina Faso, Guinea Bissau, Mali, Niger, and Togo).

Ghana and Nigeria -- together with most other West African countries -- belong to ECOWAS (Economic Community of West African States), a larger grouping set up in 1975, that has achieved very little success so far in implementing its economic integration agenda.

24. In designing and implementing a pro-active trade development strategy, Senegal will be confronted with several challenges, both at the level of policy-making, and at the level of the competitiveness of its exporters.

A. Policy Challenges

Defining a Strategy

25. While some steps have been taken to define an active trade strategy, most observers and actors acknowledge there is still a long way to go before this materialises. In particular, there does not seem to be real leadership on trade development, nor is it a shared priority among various government departments. This contrasts with Ghana, the other Sub-Saharan African country examined in this project, where a clear choice of an outward-oriented strategy has been made. Several studies aiming to identify strategic sectors in which to direct scarce capital resources have been undertaken, and a lively debate over alternative institutional architectures is taking place, but there has been no strong political signal from the highest political level to engage in an active trade development strategy.

⁷ That is 28 per cent of the 2000 T. ACP quota specified by Annex XL of the Lomé-IV bis Convention (1995-2000). See CERDI, 1998, p.58.

Following up on Trade Agreements

26. At the multilateral level, Senegal lacks the capacity to fully implement its WTO commitments and has not really started defining and defending its national interests, although some progress is noticeable. For instance, the debate over the regionalisation process (UEMOA) seems to have helped raise awareness among the business community on the issue of transaction values, for which Senegal requested a delay in implementation. As for multilateral negotiations, while some intense preparation and consultation had taken place in Senegal before the Seattle WTO meeting,⁸ the Senegal delegation was not as high-powered as those of other countries, such as Mauritius or Zimbabwe. From the business community, only individual executives from large import-substitution firms went to Seattle out of personal interest. Finally, inter-ministerial dialogue needs to be strengthened and sustained: many civil servants outside the Ministry of Trade (e.g., in the Ministries of Agriculture, Finance, and Foreign Affairs) are unaware of the implications of being a WTO member.

27. At the sub-regional level, an initial challenge relates to the implementation of commitments made in the framework of UEMOA, which some consider as proceeding faster with trade reforms than national countries can cope with. For instance, it remains to be seen how far the CET set up in January 2000 is actually being applied, and whether customs agencies have adequate capacity, equipment, and incentives to apply the new tariffication system. Other problems may emerge due to remaining disparities in protection levels and the budgetary costs of removing intra-regional tariffs. A second set of issues concerns the relationship between UEMOA and ECOWAS and the status of Nigeria and Ghana, which are members of the latter but not the former grouping.⁹ Handling this politically sensitive issue will require strong technical support, if concrete and realistic solutions are to be devised for implementing both regional schemes.

28. Finally, the post-Lomé agenda needs to be clarified quickly. Although Lomé IV-bis expired in February 2000, non-reciprocal trade preferences should be rolled over until 2008, provided a second WTO waiver is granted to the EU.¹⁰ Negotiations over a WTO-compatible, reciprocal trade agreement with the EU are due to take place between 2002 and 2008. Implementation would start in 2008. This gives Senegal until 2002 to prepare its position. The EU's position is known: it intends to sign free-trade agreements with ACP countries, preferably grouped within regional trade areas themselves. UEMOA could be the West African partner of the EU, but many questions remain (see Annex 3). While LDCs may choose to keep non-reciprocal, Lomé-equivalent tariff preferences, non-LDCs that would not wish to enter into free trade agreements with the EU would be "transferred" into the EU's Generalised System of Preferences (GSP). The latter is due to be revised in 2004, but it will probably by then be far less generous than Lomé in terms of market access. As a developing country that is not an LDC, Senegal, like Ghana, is one of the ACP countries that stands to lose most in terms of absolute and relative access to the EU market.¹¹

29. Obviously all three negotiating fora are intertwined: the WTO has rules on regional agreements that apply to UEMOA, ECOWAS, and any agreement between these and the EU. The possibility of a

⁸ See République du Sénégal, 1999a.

⁹ Nigeria and Ghana reacted strongly to the setting up of UEMOA's CET, which they fear may undermine the wider process of regional integration.

¹⁰ Article I of GATT requires WTO members who offer to lower a trade barrier to one member to extend the favour to all other members. Special preferences for developing countries are allowed —without having to be extended to developed countries— providing all developing countries benefit from them. By providing special treatment to the ACP *without extending it to other developing countries of similar levels of development*, the Lomé trade regime violates the Most Favoured Nation (MFN) principle. A first waiver was granted to Lomé IV-bis (1995-2000), which expired with the current Convention. See Solignac Lecomte, H.B., 1998, *Options for future ACP-EU Trade Relations*, Working Paper No. 60, Maastricht:ECDPM.

¹¹ See Stevens, C., M. McQueen and J. Kennan, 1998, *After Lomé IV: A Strategy for ACP-EU Relations in the 21st Century*, Commonwealth Secretariat - IDS, London.

future EU-ACP agreement with a regional grouping will depend on the progress made by UEMOA or ECOWAS. Finally, future developments in multilateral negotiations may alter the strategy of the EU (and of its ACP partners) with regard to ACP-EU trade relations. Analyses and negotiations at these three levels must be closely co-ordinated or centralised in Senegal, which is not the case at the moment, since the Ministry of Finance traditionally plays the leading role in matters relating to Lomé and regional integration.

Monitoring Trade Issues

30. A key implication of the preceding is the need for adequate technical back-up, with good connections between decision-makers and trade policy analysts, both inside the ministries and in independent institutions. Analytical capacity within the ministries is limited, especially in the Ministry of Trade where, unlike Finance and Agriculture, no special task force -- such as Unité de Politique Economique (UPE) and Unité de Politique Agricole (UPA) -- has been set up. For example, since Senegal is a net food importer, to take positions on issues such as the opening of agricultural markets, or the phasing out of agricultural subsidies, a proper assessment of risks and opportunities is needed.

A Structured Dialogue on Trade Policy

31. To identify, promote, and defend the interests of Senegal with regard to trade in various negotiating fora requires mechanisms for a permanent exchange of information and dialogue among stakeholders in the public and private sectors. One justification for this is efficiency in a context of limited capacity: officials can simply not follow all technical, sector-specific issues. The experience of the Seattle Ministerial preparation in Senegal laid the groundwork for consultation mechanisms that can be refined and made sustainable. The capacity of various stakeholders -- professional organisations, trade unions, consumers -- to take part in a structured dialogue with the government needs to be strengthened.

B. Constraints on Competitiveness

32. As highlighted in the many reviews of the limited impact of Lomé trade preferences on ACP countries, pervasive supply-side constraints rather than obstacles to market access are to blame for the poor export performance of Senegal. However, market access barriers in OECD countries do exist, and barriers now emerging pose unprecedented threats for certain sectors of the Senegalese economy.

Supply-Side Constraints

33. *Factor costs and availability* (e.g., for water, electricity, labour, etc.) have been earmarked for a couple of decades as a major impediment to the competitiveness of Senegalese firms.¹²

34. *Poor infrastructure* prevents exporters from easily accessing regional and extra-regional markets. Within UEMOA, Senegal finds itself paradoxically “enclaved,” sharing few borders with other member countries, and linked only to Mali by poor railway facilities. As for access to non-regional markets, substantial progress has been made in rehabilitating the harbour, but a lot remains to be done at the airport. For instance, due to inadequate handling facilities, fresh food products wait 4 to 6 hours between cold storage and air shipping, compared with 15 minutes in Kenya.

¹² See Berthélemy et al., 1996, pp.107-116.

35. *Access to finance* remains the most frequently cited obstacle by entrepreneurs running SMEs. Commercial banks are in a situation of over-liquidity and interest rates are only moderately high (especially when compared to Ghana), but collateral requirements prevent smaller enterprises from accessing credit. The collateral issue is worsened by the absence of private property rights on land. Larger firms are not confronted by this problem, nor are importers.

36. On the whole, however, it should be noted that Senegalese exporters are much less exposed than are their Ghanaian counterparts to the negative consequences of macro-economic instability.

Market Access

37. Thanks to Lomé tariff preferences, Senegal benefits from very favourable terms of access to its main market, the EU. But Senegalese exports are increasingly being affected by NTBs, mainly in the form of technical requirements (norms and quality standards). Some of these are legal requirements; others are imposed by importers and reflect the weak bargaining power of Senegalese exporters.

38. *Legal norms and quality standards* can be a major obstacle to Senegalese exports. While public *safety* considerations are widely acknowledged as legitimate criteria for restricting imports, some exporters consider other quality requirements more questionable. Two examples follow, one where donor assistance helped exporters meet standard requirements and secure their position on the European market (fish), and another where risks are high and have not yet been tackled (fruits and vegetables).

- *Fisheries*. A new European sanitary regulation was put in place in 1993 (when the Single Market was created). Based on the French model, it requires not only that the characteristics of products (both domestic and imported) conform to specified norms, but also that they are produced and manipulated following methods, and in premises, that themselves conform to norms specified in European directives. Regulatory and control departments in exporting countries must be acknowledged as equivalent to their European counterparts by inspection missions from the EC. With strong support from European donors, Senegal obtained its certification in 1996, which was renewed in 1999.
- *Fruits and vegetables*. In the process of harmonising pesticide limits among EU members, maximum residue levels (MRL) for most pesticides used by countries exporting fruits and vegetables to the EU have been -- or will be, by July 1, 2000 -- substantially reduced, and in some cases brought down to zero. All products for which exporting countries have not supplied information establishing a positive MRL will see the latter automatically established at zero. This will be the case for most products, because exporting countries -- including Senegal -- did not supply the relevant information promptly. This means that ACP producers are banned from using pesticides on many products they wish to export to the EU, which, in practice, prevents them from reaching the quality standards required for substantial export volumes.¹³ A failure of ACP exporters and European importers to comply with these regulations can result in significant fines.

39. *Information and bargaining power*. Other difficulties encountered by Senegalese exporters in terms of market access are their weak capacity to control the marketing of their products and their limited bargaining power vis-à-vis importers.

¹³ PPEA, Bulletin I-Flex No.1, Janvier 2000, Dakar, p.7.

40. Typically, in the case of horticultural products, European importers will deduct all charges that apply at their end, plus a high commercialisation charge (10 per cent), from gross sales, thus reporting insignificant or negative profit margins to Senegalese exporters.¹⁴ With better information and control of the price structure, exporters could bargain for better prices. Another difficulty for some exporters (again, of fruits and vegetables) is that, having difficulty accessing credit, they depend on their clients to pre-finance production, which again considerably limits their bargaining power. Restrictions can also be imposed by importers on the use of commercial brands and names, such as in the case of fish (see Box 2).

**Box 2: Non-Tariff Barriers to Trade on OECD Markets:
the Case of Fish Appellations in France**

Under the Lomé Convention, Senegalese and other ACP fish exporters benefit from special tariff preferences. Unlike many other products, for which the actual margin of preference vis-à-vis competing countries is low or rapidly eroding, fish products from the ACP still enjoy a substantial tariff advantage over non-ACP exporters.

In addition, the EU has been granting assistance to fisheries in the countries with which it has special cooperation agreements, mainly in the form of support to: (i) efforts to achieve greater coherence through rule-setting and enforcement, and improving information; (ii) the private sector, to increase competitiveness; (iii) research; and (iv) resource conservation and protection. In addition to technical and financial assistance, a specific budget line was created in 1993 for international fisheries agreements (B7-800). While developing countries (and Greenland) are the recipients of these funds (nearly 1.3 billion euro for 1993-8), this has not been counted as EU aid since the funds represent compensation for access by EU vessels to their waters. The main beneficiaries of these funds in 1998 were Morocco, Mauritania, Angola, and Senegal (See Cox and Chapman, 1999).

In spite of all these preferences and aid, Senegalese producers report being confronted with non-tariff barriers on the EU market in the form of restrictions on the use of appellations by importers. For instance, *mostelle* is not accepted by French importers and must instead be called *brotule*. Similarly, *turbot tropical* must become *ronclavele indo-pacifique*. Using an appellation less known than the traditional European equivalent gives importers an argument for paying lower prices to Senegalese exporters, and avoids potential conflict with European producers. This is detrimental to Senegalese exporters, who receive a lower price than they would if they were able to use the traditional appellation; inevitably face additional, costly marketing efforts to promote their non-traditional appellation; and find themselves confronted by a form of unfair discrimination. These requirements are imposed by European operators in the context of their commercial relations with their suppliers, rather than by law, thus reflecting the gap in negotiating power between the European firms and Senegalese exporters. These practices are also not unified across the EU; they were reported as applied by France, but not by, say, Italy.

41. In addition, a trend that clearly worries exporters and specialists interviewed for this study is the adoption by importers and retailers in OECD markets of codes of good conduct regarding hygiene, wages, etc. Indeed, 'ethical' considerations seem likely to play an increasing role in the buying decisions of importers (e.g. centrales d'achats). To some, this means that certain kinds of labour standards may be directly or indirectly imposed on exporters from developing countries in the future -- not through multilateral regulation (e.g. the WTO or the ILO), but through markets.

42. These and the other barriers noted above represent great actual and potential challenges for Senegalese exporters, and point to the need for them:

- to monitor information on markets in a preventive manner;
- to seek alliances at the national and regional levels to strengthen their bargaining power; and

¹⁴ Thiam Inter-Consult, 1997, p.14.

- to engage actively in a structured dialogue with the government (and possibly at the UEMOA level) so as to defend Senegal's interests vis-à-vis its main trade partners.

43. At the moment, awareness, capacity, and incentives seem largely inadequate, both within professional organisations, and within the administration, and platforms for public/private dialogue have so far not been used to develop a negotiating agenda within the WTO or in the Lomé framework.

III. Donor Activities and Their Relevance

A. Overview

44. None of the donors in Senegal has made trade capacity development a priority sector of intervention, but private sector development is high on the agenda of the French, the World Bank, USAID, and the EU. Via private sector-oriented projects, they are the only donors involved in substantial trade capacity development activities in Senegal (except USAID). In response to a request from the Senegalese government, the Canadian government (CIDA) also recently became involved in a major project aimed at designing a trade development strategy for the country. Other bilateral donors merely provide one-off support to bilateral trade and investment operations. Table 1 sums up the main donor trade capacity development (TCD) activities by level of intervention.

Table 1: Main Donors' TCD Activities in Senegal

Level of intervention	Donor	Project
Trade analysis	IDRC	Research networks on trade
Policy formulation / dialogue and implementation	Canada – CIDA (through ITC)	Interactive trademap for Senegal's exports
	World Bank	Groupe de Réflexion sur la Compétitivité et la Croissance (GRCC)
	USAID	Several specific trade-related short-term activities, including: study on administrative obstacles to investment, two training sessions in preparation of Seattle*
	EU	Support to regional bodies and processes (UEMOA, ECOWAS)
	France – Coopération Française	Technical assistance: Ministry of Agriculture policy unit, fisheries department (veterinary services), Customs
Export competitiveness	France – Coopération Française France – AFD	Restructuring and upgrading of the fisheries sector
	France – Coopération Française	Projet d'Encadrement et de Structuration de l'Artisanat sénégalais (PESAS)
	World Bank	Promotion and diversification of horticultural exports (PPEA)
	World Bank	Fondation secteur privé
	EU	Promotion of horticultural exports (SEPAS)*
	EU	Centre de Développement Industriel (CDI)
	EU	Support to groundnut producers (PAI / CNIA)
	GTZ	Subsidies for German-Senegal partnerships

Note: (*) Project completed.

45. **IDRC**, the Canadian development foundation, has its West and Central African office based in Dakar. Its activities cover the whole sub-region. Beyond general support to research activities on the continent (e.g. through the African Economic Research Council, AERC),¹⁵ it has three trade-specific projects that apply, *inter alia*, to Senegal, for which Laval University (Quebec) provides scientific support:

¹⁵ Today, IDRC's support to AERC is minimal (around 5 per cent through the TEC project).

- It supports two research programmes related to trade -- the “Trade, Employment and Competitiveness” (TEC) program and the “Micro Impact of Macro Policies” (MIMAP) project -- through research institutes and universities in the different countries (including in Ghana).
- It also supports a regional network of agriculture ministers, with the aim of strengthening analytical and negotiating capacity on agricultural trade issues. Studies are either co-financed (e.g. with ACBF) or funded by IDRC alone.
- Finally, IDRC Dakar initiated the CICERA project, which aims to provide financial and scientific support to economics research centres. No research programme was imposed. Funding was obtained mainly from USAID and the EC.

46. The **World Bank** supports several projects aimed at private sector development, with more or less explicit trade components.

47. Set up for 5 years in 1995, the Fondation pour le Secteur Privé aims to enhance the competitiveness and growth of the private sector by strengthening the capacity of firms and restructuring professional organisations so that they can provide better services to their members. It subsidises between 50% and 75% of the cost of a wide array of consultancy and training services for firms or organisations by local or foreign service providers. From 1996 to 1999, 473 projects were funded, of which 28% aimed to increase (mostly foreign) market penetration, accounting for 15% of funds disbursed.

48. Directly geared towards export promotion, the Projet de Promotion des Exportations Agricoles was established in response to a request by the government for support in developing agricultural exports, with a focus on horticulture, where Senegal has a strong comparative advantage due to its climate. The project has three components:

- Promotion and diversification of exports (improve quality and presentation; find new outlets beyond Benelux);
- Support to professional organisations of exporters (capacity building; training in production, marketing, etc.; information on markets);
- Rehabilitation of infrastructure (production, storage, packaging, handling facilities at airport).

49. Subsidies are granted to individual projects (60-80%) and exclude investment in equipment other than small items. The subsidy element is to decline over time. Performance is assessed against a target of annual export growth (15%), which was overtaken in the first year (17% actual growth). However, many factors influencing export growth may have little to do with the performance of the project.

50. The Groupe de Réflexion sur la Compétitivité et la Croissance (GRCC) was established by the Senegalese government after the devaluation, with support from the World Bank, as a platform for dialogue with the private sector. Its mission includes the building of consensus around concrete recommendations to enhance competitiveness and growth. For example, concrete steps were formulated for the reform and privatisation of the telecoms sector. GRCC has actively contributed to the ongoing definition of an export strategy through its work on industrial clusters.¹⁶

51. In the framework of its National Indicative Programme with Senegal for 1995-2000, the **European Union** focused its activities on public services restructuring (health, transport) and the promotion of private sector activities with a large social impact in terms of job creation and income generation (agriculture, small enterprises, and farmers’ organisations). With respect to the latter objective,

¹⁶ See Performances Management Consulting, 2000.

particular emphasis was given to the groundnut and horticulture sectors, through two projects: *Projet d'Appui Institutionnel au Conseil National Interprofessionnel de l'Arachide (PAI/CNIA)*, and *Assistance Sénégalaise d'Exportation de Produits Agricoles et de Services (SEPAS)*, now completed). Although trade development is one of the sectors that receives a significantly larger share of EU aid than that allocated by OECD donors in general,¹⁷ only the latter project clearly had a trade capacity development focus. Its failure may serve as an illustration of the difficulty of reconciling poverty alleviation and export promotion within a single project (see below). Beyond these specific projects, the EU also co-financed (with the French) elements of the restructuring of the fisheries sector.

52. A major contribution of the EU to Senegal's trade policy is the support for the UEMOA Commission (based in Burkina Faso) and the ECOWAS Secretariat (in Nigeria), under its regional Indicative Programme (RIP) for Sahelian and Coastal Western Africa. The EU, which sees its comparative advantage as a donor in promoting regional integration among its developing country partners, is the main supporter of UEMOA (euro 2 million in EDF#8).

53. The Centre de Développement Industriel (CDI), jointly operated by EU and ACP institutions in Brussels, has had an antenna in Dakar for several years. Originally based in the SONEPI, it has recently been incorporated in the FSP (see Box 3). It supplies basically the same kinds of services and financial support as the FSP. A new trade and private sector development strategy is being implemented, largely through instruments based in Brussels or at the sub-regional level.¹⁸ Among them, the European-ACP Business Assistance Scheme (EBAS), a matching grant fund that co-finances consultancy services to ACP private firms and business associations, has just started operating an office based in Côte d'Ivoire that will serve the whole of Western Africa. *Diagnos* identifies obstacles to trade and private sector development to help prepare European Commission (EC) support programmes and has prepared reports for Senegal and for UEMOA. On the whole, though, the EC's new strategy and its many instruments are not yet fully operational, and the EC delegation in Senegal was not yet well aware of their modalities.

54. The **French** are traditionally the main bilateral donor in Senegal. Their trade-related development co-operation activities are split between two institutions:¹⁹

- The *Coopération Française* provides technical assistance to various bodies, including the Ministry of Agriculture (the policy unit and the veterinary services unit of the fisheries department) and Customs. It has provided assistance in two main areas: policy formulation and implementation (e.g., support to inter-ministerial and public/private dialogue, including on preparations for Seattle); and support for the restructuring and quality upgrading of the fisheries sector.²⁰
- The *Agence Française de Développement (AFD)* and its private sector subsidiary, *Proparco*, provide pre-investment incentives -- either from their own resources or from funds delegated by other agencies (e.g. CDI) -- for investment in production or basic infrastructure. Its

¹⁷ See Cox A. and J. Chapman, 1999, *The European Community External Cooperation Programmes -- Policies, Management and Distribution*, Overseas Development Institute, London.

¹⁸ See Van Hove and Solignac Lecomte, 1999.

¹⁹ This is excluding the *Poste d'expansion économique* of the Embassy, which promotes French commercial interests in Senegal.

²⁰ Other French cooperation activities indirectly contribute to trade capacity development, e.g. technical assistance in the normalisation institute, co-funded with AFD and the EU. Similarly, other activities aim to support the private sector, e.g. the financial support to one professional organisation (SPIDS) to set up sector-specific post-graduate training modules.

activities are concentrated on commercially viable, medium- to large-scale projects. The AFD group participated in the restructuring of the fisheries sector.

55. The major recent trade-related activity of the French in Senegal is the restructuring of the fisheries sector, which included several projects: the upgrading to EU standards of fish product exporters; multipurpose support to traditional fishermen (e.g., infrastructure for processing); and improving the surveillance of fishing activities in Senegalese waters. The first project concluded in 1999 and eventually resulted in Senegal (and Senegalese firms) being certified for its exports to the EU. Firms and standards bodies have made the required investments in equipment and capacity, and operators are confident these results will be sustained.

56. **Canada/CIDA** is funding a study by the International Trade Centre (Geneva) that is designed to help Senegal develop a national trade strategy (Interactive Trademap for Senegal's exports). The objective is "to enhance the capacity of the Trade Ministry and the Senegal business community to undertake strategic market research for export development." Based on studies prepared by the GRCC and interviews with the business sector, a detailed analysis of international demand patterns for 6 selected "clusters" will be made. The choice of strategic clusters will then be submitted to private and public operators by the end of 2000.

57. **USAID** activities focus mostly on private sector development, decentralisation/governance, and health and education. USAID does not support specific trade capacity development activities in Senegal. Its private sector programme aims to:

- improve the legal, regulatory, and policy environment;
- improve access to financial services; and
- increase the use of best technical and managerial practices (including strengthening professional organisations).

58. The foundation for these activities is the comprehensive "investors' roadmap" study (see FIAS, 1999), which USAID commissioned in collaboration with the World Bank, and which analyses in great detail the administrative obstacles to investment in Senegal, including a section on international trade procedures. Recent projects targeting the private sector and touching upon trade issues include training of some 200 justices in the context of the OHADA treaty; trade missions from/to the United States; financial assistance and training for the Trade Point; and two seminars by US consultants to prepare the WTO Seattle meeting.

59. **UNDP** and **UNIDO** do not have trade capacity development projects at the national level. Capacity-building activities are undertaken at the regional level (including support for the network of national Trade Points). The activities of the Senegal bureau in support of private firms "stop at the gate of the factory." Staff were sceptical that a trade development strategy aiming to integrate Senegal in the world economy would be the best way to foster growth and reduce poverty.

60. **Germany/GTZ** activities in Senegal do not have a substantial trade or private sector component and instead focus on natural resources, health, decentralisation, etc. Nevertheless, GTZ may occasionally extend a small subsidy to a German private firm "with a development project" in the country.²¹ The

²¹ For instance, a German firm dealing in 'bio' products and buying cotton from farmer cooperatives in the province of Linguère benefited from a DM 100,000 subsidy.

managing staff considered trying to combine the interests of such firms and development objectives, but did not know about similar past experiences.

B. Assessment of Donor Performance

61. Over the last years, there have been a few trade development (or related) projects in Senegal, but they are sometimes difficult to trace, because institutional memory is often weak within donor agencies (and only one evaluation report is typically available for review) and trade capacity development is not a recognised category of assistance, by contrast with support for private sector/SME development or the health or education sectors.

Donor Bias

62. A case has been observed in which a US-funded training package for policy makers and private sector actors in the run up to the Seattle WTO Ministerial strongly emphasised issues that were negotiating priorities for the donor country (e.g., the need to do away with agricultural subsidies) while overlooking issues on which the interests of Senegal may well conflict with that of the United States (e.g., intellectual property rights). Other forms of bias are more subtle. European donors (EC and France), for example, have emphasised support for Senegalese fish exports, which do not pose a threat to EU products, to meet EU requirements, but have not put the same emphasis on tackling the challenges of pesticide notifications for Senegalese exporters of fruits and vegetables, some of which compete more directly with EU products. This is not to suggest that there is a deliberate effort to discriminate against one sector, but incentives are naturally higher for these donors to support Senegal's fish exports than they are to support fruit and vegetable exports.

63. Some officials in recipient administrations think it is inevitable that there will be some bias in donor assistance for trade capacity development, as in the case of information and training supplied in preparation for the Seattle meeting. The solution, according to these officials, is both to diversify and to confront sources of information and assistance. Preparations for Seattle revealed that domestic stakeholders themselves have conflicting interests regarding trade. For example, with respect to agriculture subsidies, some Senegalese farmers themselves could not do without them, and they bring the prices of some food imports down. By contrast, other producers may be penalised in terms of unfair competition on EU markets.

64. At the end of the day, in the view of these officials, donors belong to the "trade policy process" in Senegal; they are one of the parties that contributes to shaping Senegal's trade policy, and like any stakeholder, they have their own interests to defend. As the trade policy process gradually matures, becoming more transparent and bringing in more actors (e.g., the private sector), and as long as no single donor is in a position to shape the country's trade policy, the government should be able to make its own decisions.

65. Others are more pessimistic and believe multilateral institutions like the WTO, UNDP, and the World Bank are better placed to support trade policy formulation and implementation than bilaterals, due to their "neutrality." According to this view, it is not legitimate that bilateral donors, who are also trade partners, should be shaping the country's trade policy, adding interference through aid to commercial superiority.

Donor Co-ordination

66. Donor projects aimed at the private sector on the whole have tended to be supply-driven and dispersed, although donors do communicate with one another, and some cases of co-ordination can be observed.

Box 3

A case of “Bottom-Up” Donor Coordination

The EC’s Senegal antenna for the Brussels-based CDI (Centre de Développement Industriel) is fully integrated in the IDA-sponsored FSP (Fondation pour le Secteur Privé). They share procedures, forms, data, clients, and channel recipient firms to either of the funds. The framework agreement signed between the two institutions in December 1998 followed an earlier initiative by local managers to merge.

67. At the time of the study, there were 19 co-ordination committees among donors in Senegal. None of them focused specifically on international trade. The informal group on the private sector was co-ordinated by the United States and involved private sector representatives. An informal group of economists from donor agencies would meet on an *ad hoc* basis to discuss macro-economic issues. While a useful dialogue seems to have developed through these mechanisms, it seems to have generated little actual co-ordination at the recipients’ end. Indeed, the successful cases of co-ordination that were observed in the area of private sector development, were among project managers themselves, rather than among donor agencies:

- The IDA-sponsored FSP links up with several institutions sponsored by the Swiss government (SOFI), UNCTAD (Empretec), the EU (CDI, see box 3), as well as the PPEA.
- The threat of the EU’s new regulation on pesticide levels was first spotted by the EU-based COLEACP (a joint ACP-EU institution), and both the PPEA (World Bank) and the technical assistance unit in the French Ministry of Agriculture subsequently helped in disseminating information and raising awareness among professionals and civil servants, and in setting up a committee to monitor the issue.

68. By contrast, less actual co-ordination was observed at the level of policy formulation and negotiations. For instance, donor activities supporting the preparation for the Seattle meeting were led separately by USAID, the French, the FAO, and the Islamic Development Bank.

Efficiency in Disseminating Information

69. Information on trade issues may be abundant, but actual access remains limited due to improper dissemination. In the absence of widespread access to the internet, hard copies remain the main vehicle for dissemination. But hard copies often circulate to the wrong persons or in inadequate numbers (and photocopying can be a problem). Position papers sent by the WTO have been seen used to wrap peanuts sold outside a ministry. As part of the preparation for multilateral negotiations, a substantial and comprehensive set of FAO documents, aimed at farmer organisations, had been made available to various actors, but efficient dissemination requires regular contact and involvement in the various consultation and dialogue fora, such as the inter-ministerial committee on trade. This dissemination role among governmental and non-governmental actors was actually played by the French technical assistant posted in the Unité de Politique Agricole of the Ministry of Agriculture.

70. Similarly, the difficulty encountered by IDRC projects is to bring the results of research based on CGE modelling to the level of policy-making. There, the focus on strengthening research capacity leaves a gap: understanding the trade policy process in Senegal, identifying the “points of entry” for independent analysis, and designing adequate, user-friendly dissemination formats (publications, meetings, etc.) is relatively uncharted territory.

Interface with Private Exporters

71. A seminal difficulty lies with the fact that few, if any, donors have a track record of working successfully with the private sector. In particular, the capacity of private operators to articulate their needs or deal with aid mechanisms should not be overestimated. The procedures that must be followed to request and receive assistance scare some potential beneficiaries away. But donor agencies want to make sure funds are used properly. One solution may lie in reducing the scope of application procedures at the level of the project by gradually transferring financial responsibility to the project itself on a commercial basis, with *ex post* auditing replacing *ex ante* controls by the donor agency.

72. Useful lessons may also be drawn from the World Bank-sponsored PPEA. Although this project has merely entered the first year of its four-year pilot phase, and thus does not allow for definitive observations, some points emerge from interviews of beneficiaries and observers:

- Although under supervision of the Ministry of Agriculture, the autonomy of the management, both during the initial phase of recruitment and during the operational phase, seems to foster competence and leadership.
- Co-management ensures ownership: Professional organisations make up half of the board (at par with government) and sit in the committee that selects projects (together with the project management).
- The sectoral focus seems a major strength: All staff are specialists on specific horticultural products, covering technical and commercial aspects along the whole production chain. This includes a good command of markets, the way they are operated, and by whom. They are thus able to tackle comprehensively the problems that confront exporters, to communicate effectively with them, and to build trust.

Impact and Ownership

73. *Public sector.* As in other aid sectors, TCD aid can have a disruptive impact on institutions simply by injecting funds in a context of scarce resources. Some projects are perceived by officials to be siphoning off some of their most competent staff into semi-autonomous structures. By contrast, however, other projects are “keeping ministries afloat,” but indirectly create a two-track system within the administration (e.g., the Unité de Politique Economique, the ACBF-sponsored unit posted in the Ministry of Finance, which pays local technical assistants better than civil servants) or may increase capacity temporarily with a chance that it may not be sustained in the longer run (e.g., the Unité de Politique Agricole in the Ministry of Agriculture, supported by French technical assistance).

74. *Private sector.* Private operators largely believe that most TCD projects take little account of their real needs and capacities. For projects like the FSP, there was some consultation, and business people had an opportunity to voice their demands and concerns early on, but most feel the decisions eventually made took little, if any, account of their contributions. As a result, exporters complain that the trade-related assistance they have received merely tackles “peripheral” issues, without offering much help with their main problem, which is to produce goods, rather than to sell them. Institutions such as FSP, CDI, and EBAS indeed provide mostly consultancy services for market development (e.g., feasibility studies, market

studies) and co-financing for such services, but factor costs and limited access to credit are exporters' main preoccupations. Very broadly, the picture is thus one of TCD donors "not listening enough" to their "aid clients," on the one hand, and recipients focused on non-trade issues, on the other hand.

75. This raises two issues. First, early and genuine consultation with beneficiaries is essential, but it will not be sufficient if, after asking for their clients' opinions, donors then deliver nothing more than "what they have in store" in the form of consultants or technical assistance, rather than use their resources to help recipients find appropriate answers to expressed needs.

76. Second, as for expressed needs, a case can indeed be made that donors should not devote resources to TCD initiatives when needs are obviously concentrated around major supply-side constraints. But this is arguably not the case in Senegal. So why do exporters consider TCD of secondary importance? The answer is that they may well overlook specifically trade-related challenges because they are not aware of them (e.g., challenges related to the notification of standards in the WTO, opportunities to use anti-dumping and trade remedy measures, the implications of the various post-Lomé scenarios, etc.).

77. Getting potential beneficiaries to express their needs may require more than simply asking the opinion of individual entrepreneurs (or indeed, of civil servants). A process-oriented approach through capacity-building activities at the sectoral level, or with established professional groupings, cannot only have a direct positive impact on capacity, but also contribute to the identification of further needs and the formulation of new requests by recipients. Such activities, although eligible for support by institutions like FSP, EBAS, and others, still account for a tiny portion of the projects those institutions fund. The institutions themselves need to facilitate and encourage the demand for their services.

Promoting Trade and Alleviating Poverty

78. Trying to address both trade development and poverty alleviation at the same time within a single project can be tricky: attempts to introduce a pro-poor bias in a trade promotion project aimed at private exporters have failed. In the case of one EU-sponsored horticulture project in Senegal (support to SEPAS), financial support had been provided to big and small producers under the condition that they would join together in a single professional organisation, so that the small would not be left out. But many of the smaller producers failed to comply with quality requirements, which negatively affected the quality of products and the image of the whole sector, and eventually depressed prices for all.²² On the whole, poor people were not negatively affected, but the project did not improve their prospects as much as it might have had it been more focused on the stronger producers.

79. By contrast, although the original aim cannot be said to have primarily been poverty alleviation, support by the French and the EU for the modernisation of the fish exporting sector has indirectly contributed to at least preserving, and probably eventually enhancing, employment among traditional fishermen who supply the processing industry.

80. These examples do not allow for easy generalisations about the impact of TCD on poverty. They merely illustrate that good (or bad, or neutral) export performance in a labour intensive sector is good (or bad, or neutral) for the poor. In general, the potential positive and negative impacts of a TCD project on the poor should be identified and monitored right from its inception. But it would be a mistake to assess the effectiveness of TCD projects based solely on their short-term impact on poverty.

²² See Stinglhamber, 1996.

IV. Lessons and Recommendations

The Need for a Comprehensive Approach, and a Genuine Trade Strategy

81. The main constraints facing exporters are not directly trade-related. Support by donors for structural adjustment, private sector development, and public/private partnerships is important and all should tackle their respective trade dimensions.

82. Turning to TCD activities themselves, a first step is to ensure that trade is genuinely on the government's agenda. In the absence of a trade strategy that clearly articulates national interests within the framework of a comprehensive development strategy, there is a risk that donors' TCD activities will shape the trade priorities of the recipient country, with emphasis placed on areas in which donor assistance is available. This is particularly the case for the Senegalese government, for whom trade was never really a priority, and whose trade and related policies were designed reactively (e.g., in response to the Lomé Convention). This is also the case for TCD on the private sector side, where compliance with SPS and other safety and quality requirements may be consistent with the priorities of major donors and trade partners. While compliance with these requirements may also serve the trade development needs of the recipient country, there may be *other* needs that are just as important, but for which the donor will have fewer incentives to propose assistance (e.g., the need to contribute to discussions on notifications of pesticide levels at the WTO). It is up to the government, businesses, and non-governmental organisations to identify these other needs, and to seek assistance for addressing them.

Trade and Development: The Case Still Needs to be Made

83. A fundamental question for trade capacity development is whether, and how, African countries can industrialise, and whether and how industrial growth can foster development and reduce poverty. These issues are still extensively debated, even within donor agencies. Mainstreaming trade development as an element of Senegal's global growth and development strategy requires that the case for the connection between trade, development, and poverty reduction be made more clearly by the government itself, but also by and within the donor community. This will require further clarification by the research community of the causal links between trade, development, and poverty reduction, and/or empirical evidence that trade can foster growth and job creation. A success story in non-traditional exports, say in fruits and vegetables, which could benefit under-developed regions (e.g., the fertile northern areas by the river Senegal) would probably be the best advocate.

Public/Private Dialogue: The Need for a Long-Term, Comprehensive, Process-Oriented Approach

84. Strengthening the capacity of public and private stakeholders to engage in a dialogue on trade policy cannot be done solely for the sake of promoting such a dialogue. Senegalese private firms need strong professional organisations to provide services to their members and defend their interests, just as workers need unions and consumers need associations to watch over their interests. Strengthening the capacity of these organisations to engage in a dialogue on trade, and supporting the development of mechanisms for institutional dialogue, can be only one aspect of a general effort by donors to promote partnerships at the domestic level on development policy issues. Donor support must be granted to legitimate and representative bodies stemming from initiatives taken by stakeholders themselves. Otherwise, there is a risk of creating "market" for organisations and associations seeking ODA funds as rents.

85. This is a lengthy process that goes beyond narrowly-defined trade capacity development activities. The approach should be to make sure that trade issues are included on the agenda of donors' activities supporting the building of partnerships between the government and private sector or civil society bodies. A prerequisite for donor activities in these areas is the readiness of the government to engage in a genuine policy dialogue with stakeholders, in a democratic setting, which is the case in Senegal.

Development Objectives vs. Trade Interests

86. *At the productive sector level.* When addressing the issue of "tied" TCD at the level of the productive sector, a distinction needs to be made between subsidies to individual partnership projects between "South" and "North" firms, on the one hand, and bigger projects at the sectoral, national, or regional level, on the other. The former may have very positive impacts at the level of individual firms, but evidence suggests that the overall impact on the economy remains very limited and most benefits are captured by the donor country through technical assistance and equipment supply (e.g., the French "clause d'origine," or purchasing requirements in German or Dutch projects).²³

87. As for the latter, comprehensive policies based on a "complementarity of interests," such as those implemented in the context of ACP-EU agreements, can to some extent be considered a mixed blessing. Through a mix of tariff preferences, technical and financial assistance, and restrictions on market access (NTBs), donors may tend to effectively exercise almost full control over the marketing process of a certain product -- as illustrated by the case of EU and French policies vis-à-vis fisheries. Assistance in this context is aimed primarily at ensuring that producers can supply the EU market with competitive and safe products, and in the case of Senegal fisheries, can rightly be considered a success.

88. But such assistance cannot explicitly aim to strengthen the bargaining power of exporters or help them diversify their markets away from the EU. To put it simply: is it a good thing that Europeans actively supported the restructuring of the fisheries in Senegal? Yes, certainly. Did it help Senegalese exporters diversify away from European markets and increase their bargaining power? Not really. Strengthening the capacity to *comply* with technical requirements and quality standards is key to improving competitiveness, but improving the capacity to monitor the design and implementation of such requirements --at the multilateral level, but also in bilateral fora such as the ACP-EU co-operation framework -- is also necessary. The case of Senegal shows that, in the absence of strong leadership and vision on trade by the government and exporters, donors tend to put stronger emphasis on the former than on the latter.

89. *At the policy level.* A related issue, at the level of capacity-building for trade policy formulation, is how far bilateral donors can support trade policy making without shaping the trade policy of the recipient country. The thin line between support and interference is easily crossed. Donors are tempted to "positively discriminate" in favour of trade-related assistance which they see as generating benefits for their own economies or firms (e.g. implementation of commitments under TRIPS, or compliance with their own NTBs). In addition, a donor's support for the enhancement of the negotiating capacity of a recipient country (say, in the WTO) may alter the country's negotiating goals and incentives, as the donor is also a trade partner sitting at the negotiating table.

90. *Can donor bias in TCD be monitored or reduced?* Different types of "precautions" could be envisaged to limit the potentially harmful biases mentioned above:

²³ It could be useful to review the legitimacy of earmarking funds allocated to these schemes as ODA.

91. Mutually agreed donor guidelines on confidentiality of technical support, on technical assistance content “ceilings,” and on rules for the use of ODA funds in partnership and other TCD projects in which “mutual interests” are pursued could reduce bias problems.

- Multilaterals may well be better-equipped than bilaterals (including the EC) to provide direct assistance in trade policy formulation and negotiation. The more multilaterals are able to help developing countries express their TCD needs, and the more they are able to respond to them, the less developing countries will need to depend on bilaterals for the formulation of their trade policy.
- More importantly, though, bilaterals’ TCD aid (maybe even less than in other aid sectors) should not be based the assumption that donors know what the needs of the recipient country are, or what its interests should be. TCD aid should aim primarily at strengthening the capacity of the various parties to identify these needs and interests, so that they can play effective roles in the “trade policy process.” To put it simply: it may be more useful to help, say, several private sector associations that have an interest in WTO issues to set up a permanent mechanism for surveillance and analysis of those issues than to post a technical assistant for two years in the country to directly provide such surveillance and analysis. By contrast with direct assistance to trade policy formulation, this is an area where bilaterals may well be better-equipped than multilaterals.

Safety and Quality: What about Imports and Domestically Traded Goods?

92. What is often left out of donor activities is the issue of minimal safety and hygiene requirements for imported and domestically traded goods. For instance, there is little or no regulation on semi-finished metal products for construction. Allowing these products to be sold without adequate information about their performance characteristics may pose serious risks for public safety. The same applies to food, pharmaceuticals, and other products. Capacity to monitor these issues is lacking at the national level; consumer associations lack representativeness, and data or research are limited.

93. This is an issue in public security and in competition regulation. The risk posed by a race to the bottom in safety is that producers or importers that comply with minimum standards will be driven out of the market. As long as national markets are protected, consequences remain within the borders. But as regional markets become freer (e.g., in the UEMOA free trade zone), the issue may jump borders and could easily be abused for protectionist purposes. This may call for the definition and enforcement of basic safety standards at the regional level, on a sectoral basis.

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Appendix 1 - Senegal: Statistical Profile

	<u>Senegal</u>	<u>Sub-Saharan Africa</u>	<u>Year</u>
Poverty & Social Data			
• Population (m.)	9.0	-	1998
• Life expectancy (years)	52.0	51	1998
• Adult illiteracy (%)	67.0	42	1998
• HDI value	426.0	.463	1997
• % Below national poverty line	33.0	-	1998
Key Economic Data			
• GNP (\$US bn.)	4.8	-	1998
• Real GDP growth (%)	5.7	3.4*	1998
• Average GDP growth (%)	2.4	-	1988-1998
• GNP per capita	530.0	480	1998
• ODA as % of GNP	10.1	4.4	1997/98
• Public & private debt (\$US bn.)	3.4	-	1998
• Net private capital flows (\$US m.)	44.0	-	1997
Trade-Related Data			
• Exports (\$US m.)	535.8	-	1998
• Export growth (%)	5.2	-	1998
• Average export growth (%)	2.0	-	1988-1998
• Goods trade as % GDP (PPP)	10.5	17.8	1997
• Current account balance (\$US m.)	-58.0	-	1997
• WTO member since 1995; GATT member since 1963			
<i>Merchandise Exports (1997)</i>		<i>Major Export Markets (1997) % of total</i>	
Total \$US m.	393.0	India	25.6
% Food	16.0	Mali	9.4
% Agriculture/raw mat.	9.0	France	8.4
% Fuels	15.0	Côte d'Ivoire	4.6
% Ores & Metals	11.0	Benin	4.1
% Manufactures	50.0		
<i>Service Exports (1997)</i>		<i>Major Export Products (1997) \$US m.</i>	
Total \$US m.	556.0	Fish and Fish Products	30.7
% Transport	10.1	Chemicals	12.3
% Travel	30.2	Groundnuts and products	5.4
% Communications	59.3	Phosphates	3.4
% Insurance & Financial	0.4		
* data refer to Africa			

1 Sources: World Bank, World Development Indicators, 1999; World Bank, Country Profile; IMF, World Economic Outlook, 1999; IMF, Direction of Trade Statistics Quarterly, September 1999. DAC Journal Development Co-operation 1999 Report; UNDP, Human Development Report, 1999; Economist Intelligence Unit 4th Quarter Country Report, 1999.

Appendix 2 - The CFA Franc

The CFA zone formally comprises two monetary zones, each with its own currency and Central Bank. Senegal is home to the Central Bank of the West African Economic and Monetary Union (UEMOA). The two CFA francs are pegged to the French franc (FF), and the two CFA zones have a special budgetary (not monetary) arrangement with French authorities:

- the exchange-rates of both CFA francs are fixed against the FF;
- the full convertibility of both CFA francs into French francs is guaranteed by the French Treasury (which has a specific budget line);
- the two Central Banks are statutorily required to deposit 65 per cent of their foreign exchange reserves in the French Treasury, each through their own "compte d'opération". When the net position of one of the two accounts is in debit, the French Treasury covers the deficit; when it is in credit, the two Central Banks contribute to the accumulation of foreign exchange in the franc zone.
- the French Treasury has membership on the boards of the two Central Banks, and therefore participates in the formulation of the monetary policy in the two monetary unions.

The arrangement has provided stability of exchange rates and prices, but rigidity and overvaluation of the CFA franc contributed in the 1980s to fiscal imbalances and impeded structural changes needed by economies in the CFA zones. Eventually, the parity changed in 1994 (from 50 to 100 CFA francs per FF for West and Central African CFA countries). The advantages of a single currency are less than in, say, the EC, due to low levels of intra-regional trade.

The debate continues as to the relative merits of the current system. Proponents of its continuation argue that (i) the current move towards customs unions would allow these economies to better reap the benefits of the monetary union, and (ii) maintaining the link would ensure the support of European institutions and the IFIs in conducting multilateral surveillance of national economic policies (a key feature of the two regional monetary arrangements). Critics – mostly in the private sector -- stress the continuing rigidity that the peg imposes on the CFA economies.

On July 1, 1998, after some intra-European debate, the EC decided that the fixed parity would be maintained after the introduction of the Euro. France will have to keep the EU authorities informed of implementation and changes in parity. Any change in the nature or scope of the arrangements would require approval by the European Council, after consultation with the EC and the European Central Bank.

The French Franc zone

	Countries	Currency	Central Bank	Fixed exchange rate to FF since Jan. 1994
CFA zone	UEMOA ¹ (Union Economique et Monétaire Ouest-Africaine)	Franc de la Communauté Financière Africaine (CFA)	BCEAO – Dakar (Banque Centrale des États de l'Afrique de l'Ouest)	0.01
	CEMAC ² (Communauté Économique et Monétaire d'Afrique Centrale)	Franc de la Coopération Financière Africaine (CFA)	BEAC – Yaoundé (Banque des États de l'Afrique Centrale)	
Other	Comoros	Comorian franc	Central Bank of Comoros	0.013

- Notes:
1. English acronym: WAEMU (West African Economic and Monetary Union)
 2. English acronym: CAEMA (Central African Economic and Monetary Area)

Appendix 3 - The Feasibility of a Regional Economic partnership Agreement between the EU and UEMOA/Ghana

Results of a study Commissioned by the EC and prepared by the Centre d'Etudes et de Recherches sur le Développement International, Université d'Auvergne, Clermont Ferrand):

Feasibility of a REPA

The study does not provide a detailed analysis of the feasibility of a REPA. However, while assuming that UEMOA will become a customs union on January 1, 2000 as planned, it argues that this process -- a prerequisite for a REPA -- may be more difficult than implementing the REPA itself. The main problems are the remaining disparities in protection levels and the budgetary costs of removing intra-regional tariffs. Tax losses would be particularly heavy for the LDCs, which trade most with other UEMOA countries. On the whole, customs revenues make up 40 percent of UEMOA governments' aggregate revenues. As for Ghana, it has lower tariff levels than UEMOA countries and depends on customs revenues for 20 percent of its total government revenues.

Some elements in the study suggest, but only indirectly, that UEMOA may be better suited than other ACP regions for implementing a REPA with the EU along the proposed timetable. In particular, unlike UDEAC -- and while keeping in mind the difficulties mentioned above -- UEMOA has managed to build on its common currency to increase economic cooperation. The structure of agricultural production in UEMOA countries is largely dissimilar to that of the EU -- by contrast with many SADC countries -- which makes them less vulnerable to EU subsidised exports. Issues in the negotiations would therefore be less sensitive than those between the EU and SADC.

Impact of a REPA

The study does not assess the impact of the non-REPA scenario (where Côte d'Ivoire and Senegal would be transferred into the GSP). For the REPA scenario, it assumed the agreement would be established between 2005-2017, with a gradual reduction in tariffs (of about 8 per cent per year across the board, instead of back-loading the most sensitive liberalisation steps) and the exclusion of "strategic" consumer goods. Welfare gains and losses were measured using a partial equilibrium model, based on the assumption that UEMOA succeeds in completing its customs union by 2000. Ghana is not included in the calculations. Substitutability between goods imported from UEMOA countries, from Europe, and from the rest of the world is assumed to be imperfect (although the perfect substitutability assumption was tested as well). The lack of adequate data did not allow the consultants to take account of revenue effects or the impact of change in trade policy, but they did control for the difference between official tariff rates and tariffs actually collected. Two alternative sets of assumptions were therefore used: the "high hypothesis" (perfectly substitutable goods, calculations based on official tariff rates) and the "low hypothesis" (imperfectly substitutable goods, calculations based on tariffs actually collected). The authors considered the latter to be the most realistic. The results of the model show that:

- Substantial trade diversion will occur, with imports from Europe displacing imports from the rest of the world and in some cases from UEMOA countries.
- Efficiency gains for consumers (in terms of lower prices) vary between 0.29 to 1.35 percent of GDP for each country (0.81 to 2.52 percent under the high hypothesis). Senegal benefits most because Europe already makes up a substantial share of its imports.
- Fiscal losses from 2017 onwards vary between -0.20 and -0.84 percent of GDP across countries (-0.59 to -2.65 percent under the high hypothesis). Here again, Senegal is most affected for the reasons given above. For UEMOA as a whole, this represents an average 44 billion FCFA per year over the transition period, 2005-2017 (129 billion FCFA under the high hypothesis) and 81 billion FCFA per year beyond 2017 (235 billion FCFA under the high hypothesis).

The authors warned that these results must be taken with great caution, because (i) the partial equilibrium model, in which budgetary constraints are not taken into account, will systematically exaggerate gains and losses, (ii) some customs data are not totally reliable; and (iii) the length of the period studied makes such results indications, and not precise measurements. They also stressed that, over ten years, UEMOA countries would have to radically reform the structure of their fiscal regimes, which they have not managed in almost 20 years of structural adjustment. Finally, the study emphasised that EU financial measures would be necessary to offset economic and social costs and to ease the budgetary pressure. Fiscal losses induced by a REPA, while relatively high for UEMOA countries, would be small in absolute terms for the donor.

Appendix 4 - List of Persons Contacted

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