

Report No. 1626a-COM

FILE COPY

The Economy of the Comoros

July 26, 1977

Eastern Africa Regional Office

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CURRENCY EQUIVALENTS

			<u>End of period</u>	<u>Yearly Average</u>
1968	US\$1.00 CFAF 1	=	CFAF 246.85 US\$0.0041	CFAF 246.85 US\$0.0041
1969	US\$1.00 CFAF 1	=	CFAF 277.71 US\$ 0.0036	CFAF 259.71 US\$0.0039
1970	US\$1.00 CFAF 1	=	CFAF 277.71 US\$0.0036	CFAF 277.71 US\$0.0036
1971	US\$1.00 CFAF 1	=	CFAF 255.79 US\$0.0039	CFAF 277.03 US\$0.0036
1972	US\$1.00 CFAF 1	=	CFAF 255.79 US\$0.0039	CFAF 252.21 US\$0.0040
1973	US\$1.00 CFAF 1	=	CFAF 230.21 US\$0.0043	CFAF 222.70 US\$0.0045
1974	US\$1.00 CFAF 1	=	CFAF 222.22 US\$0.0045	CFAF 240.50 US\$0.0042
1975	US\$1.00 CFAF 1	=	CFAF 224.27 US\$0.0045	CFAF 214.32 US\$0.0047
1976	US\$1.00 CFAF 1	=	CFAF 248.49 US\$0.0040	CFAF 238.98 US\$0.0042

FISCAL YEAR

January 1st to December 31

Foreword

This report is based on the findings of a mission to the Comoros in November/December, 1976 consisting of Messrs. P. Landell-Mills (chief of mission) and M. Ragno (general economist). The report also incorporates the findings of a transport sector mission consisting of Ms. F. Johansen (transport economist) and Messrs. G. Orsini (roads engineer) and D. Raymond (ports specialist) which visited the Comoros in March, 1977. The report was discussed with Comorian Government in June, 1977 and subsequently updated.

THE ECONOMY OF THE COMOROS

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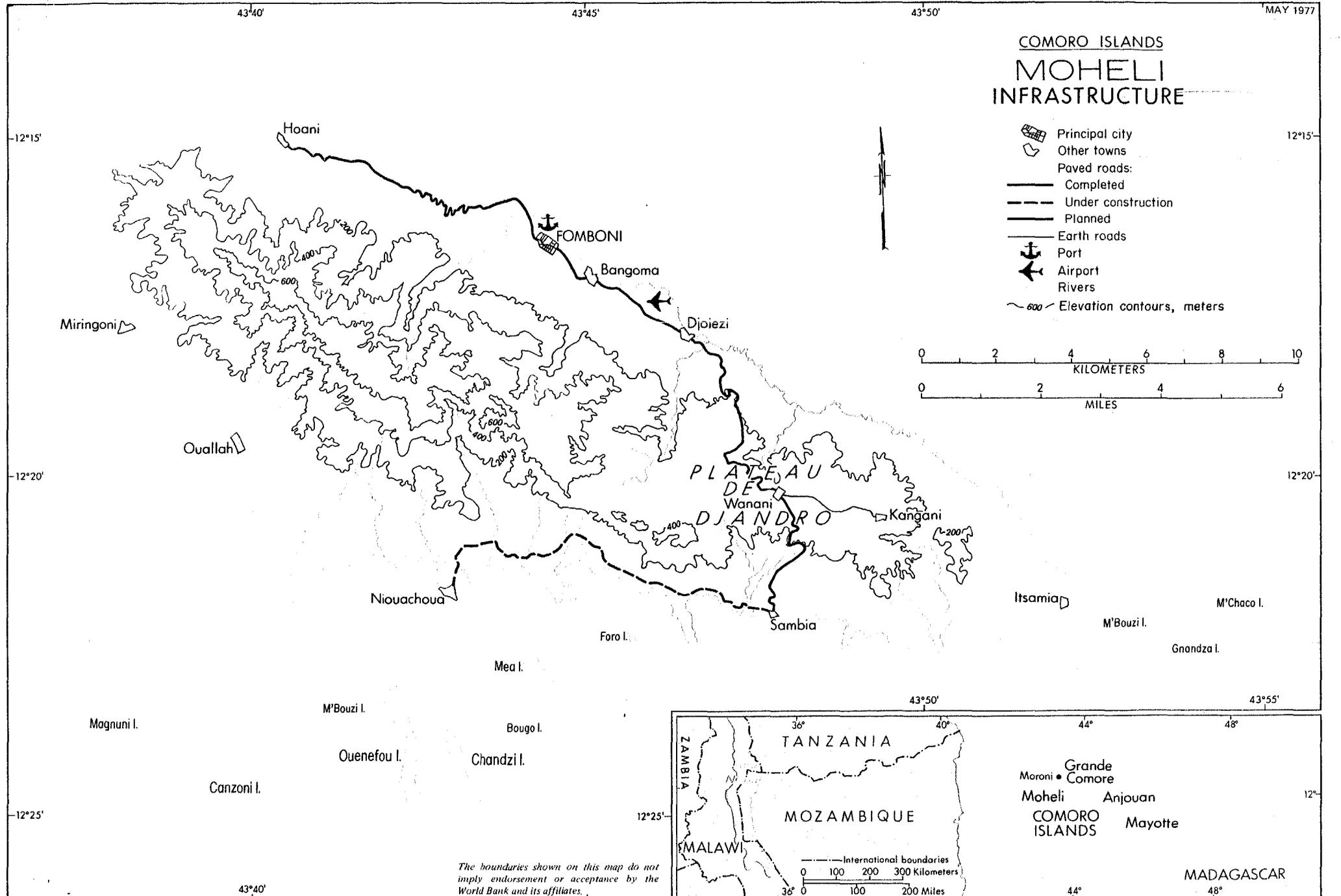
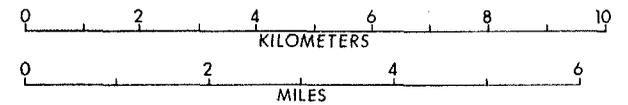
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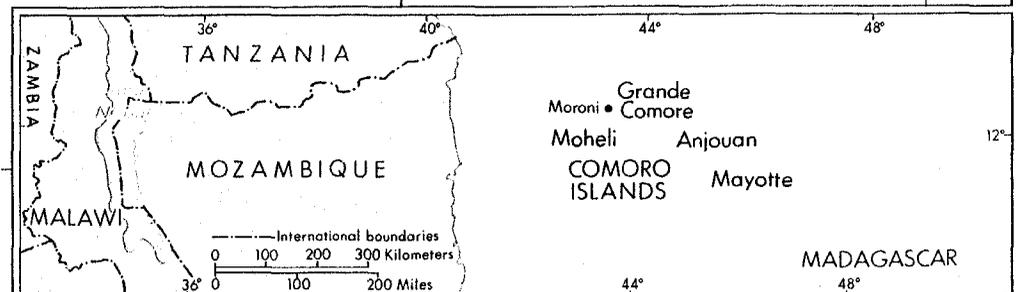
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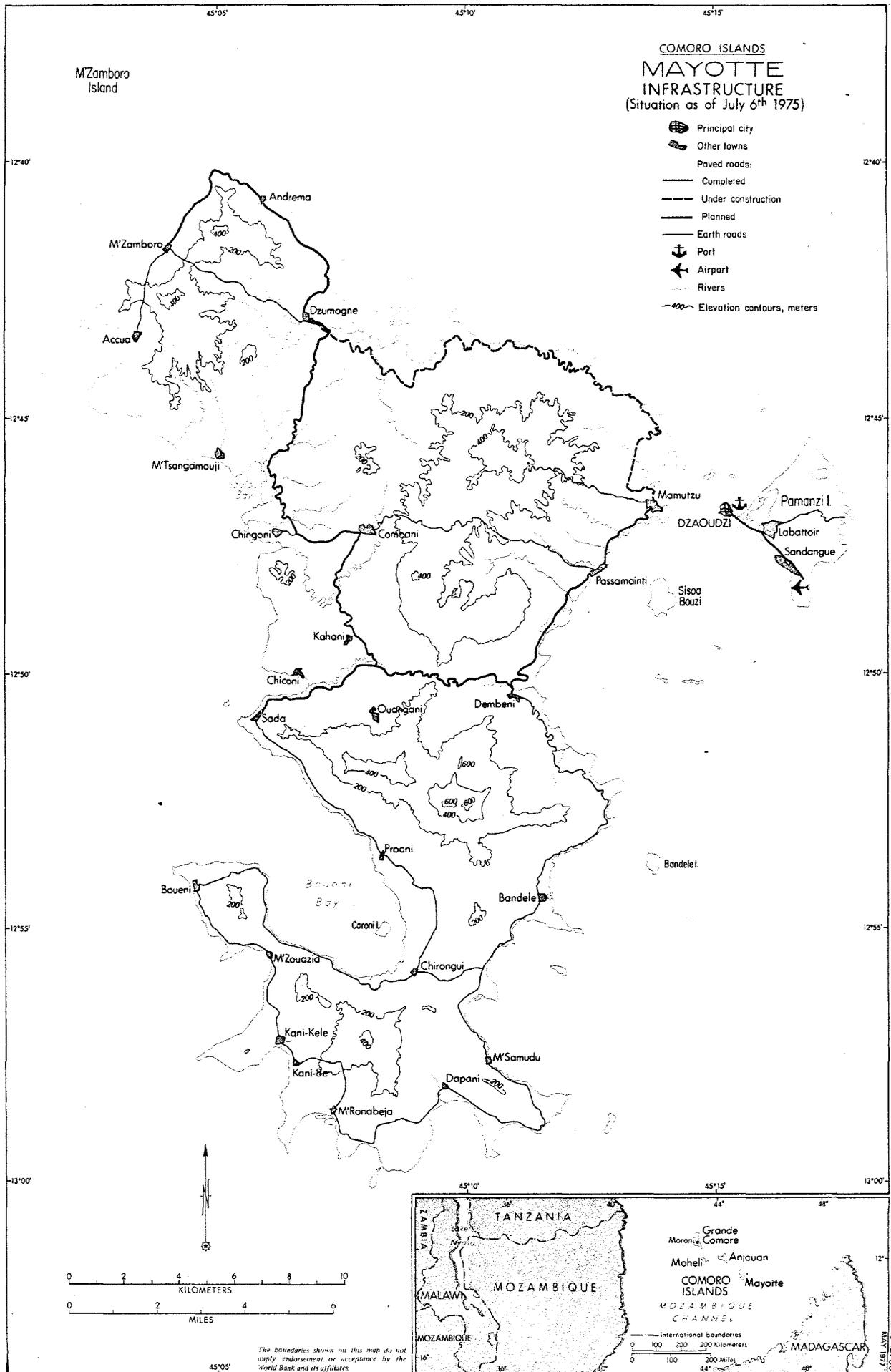
COMORO ISLANDS MOHELI INFRASTRUCTURE

-  Principal city
-  Other towns
- Paved roads:
 -  Completed
 -  Under construction
 -  Planned
- Earth roads 
- Port 
- Airport 
- Rivers 
-  600 Elevation contours, meters



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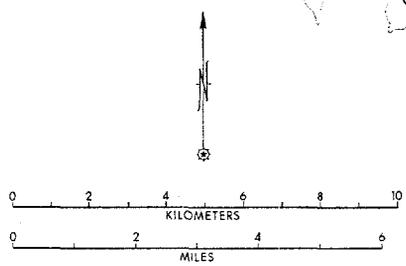
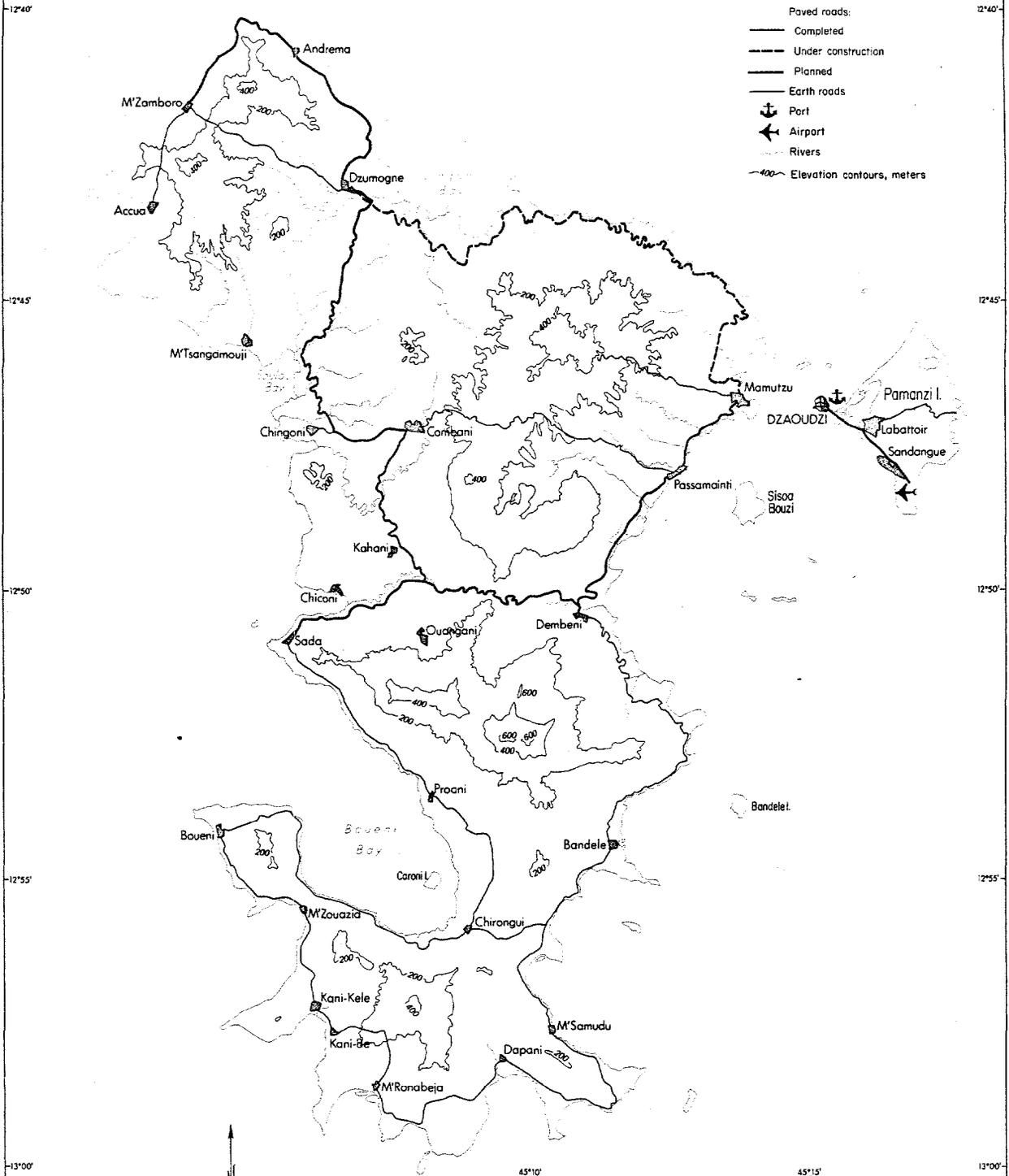




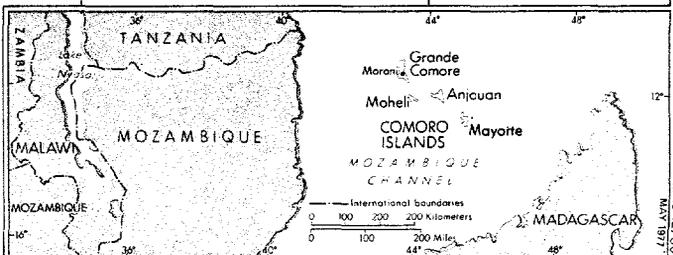
COMORO ISLANDS
MAYOTTE
 INFRASTRUCTURE
 (Situation as of July 6th 1975)

- Principal city
- Other towns
- Paved roads:
 - Completed
 - Under construction
 - Planned
- Earth roads
- Port
- Airport
- Rivers
- Elevation contours, meters

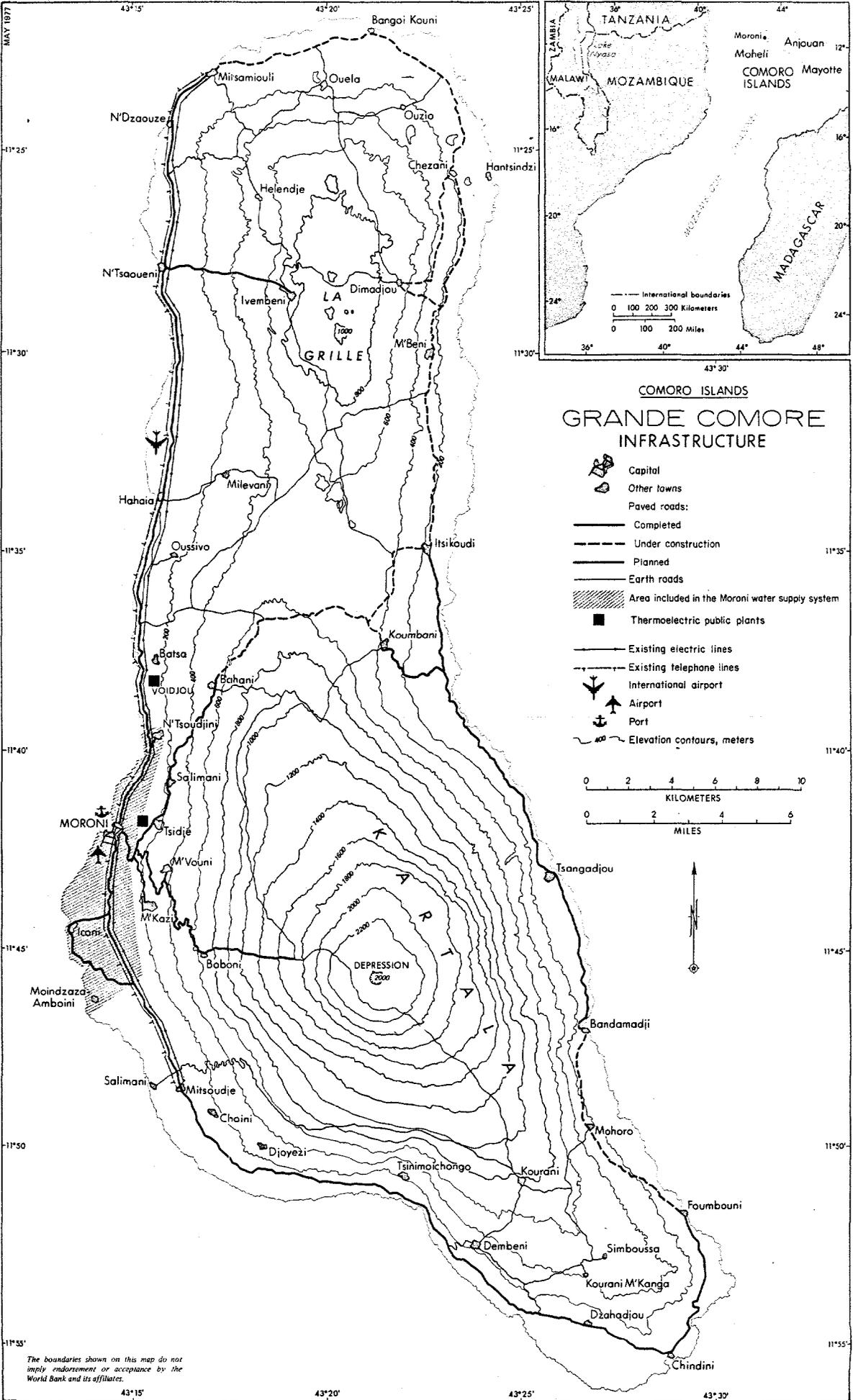
M'Zamboro Island



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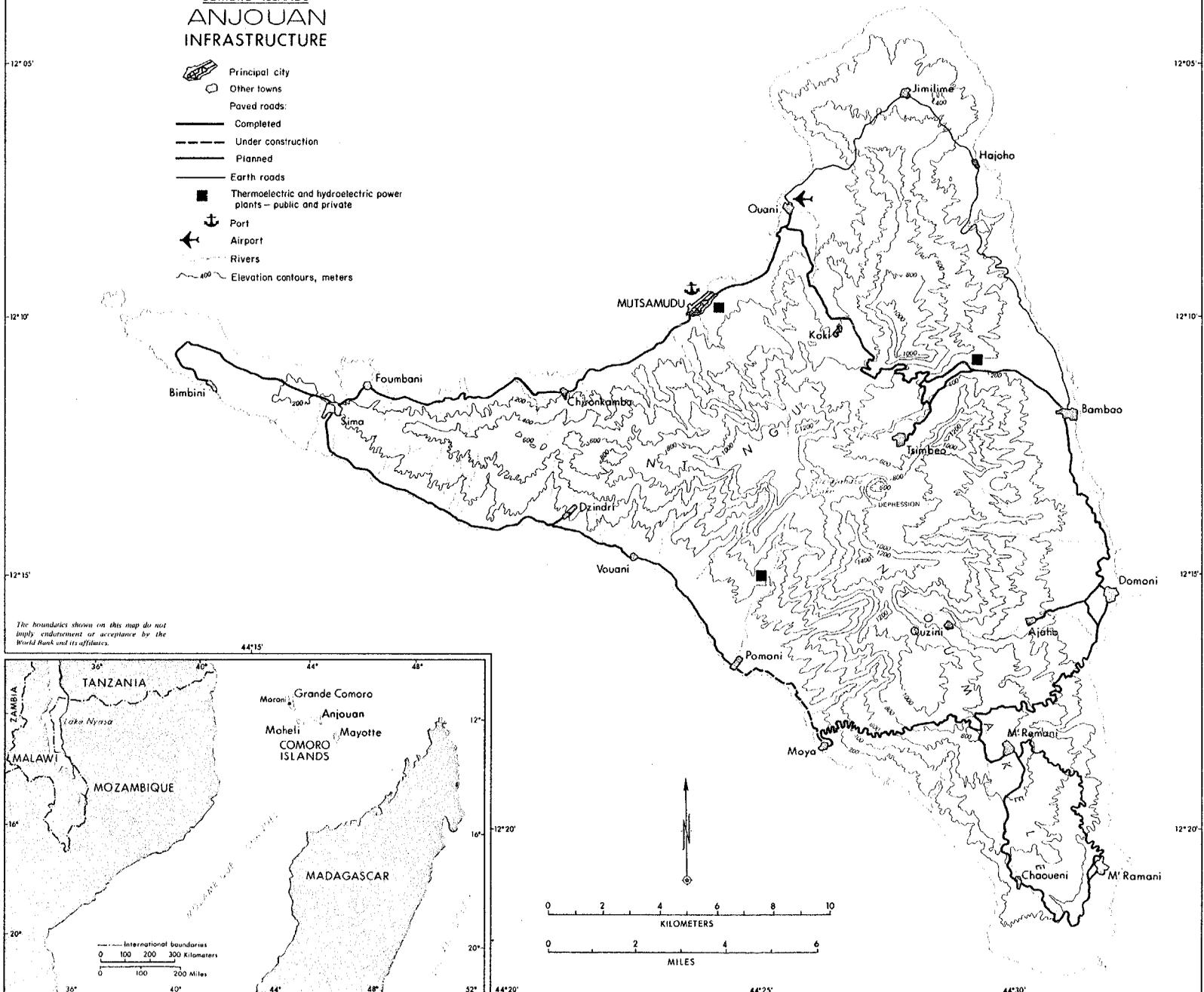
BRD 12/38
 MAY 1975



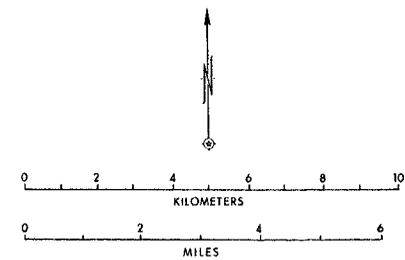
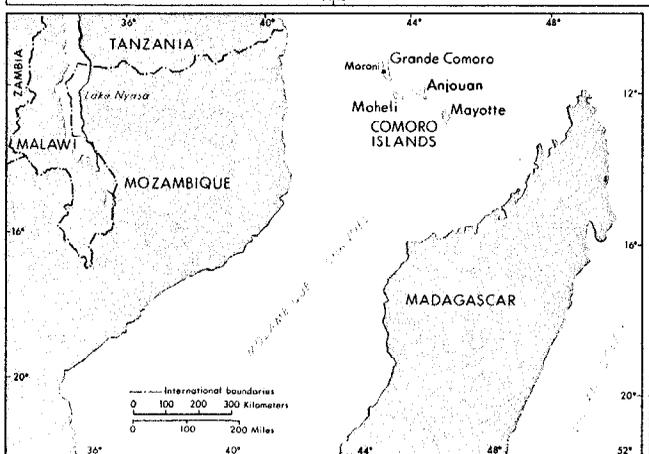
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COMORO ISLANDS
ANJOUAN
INFRASTRUCTURE

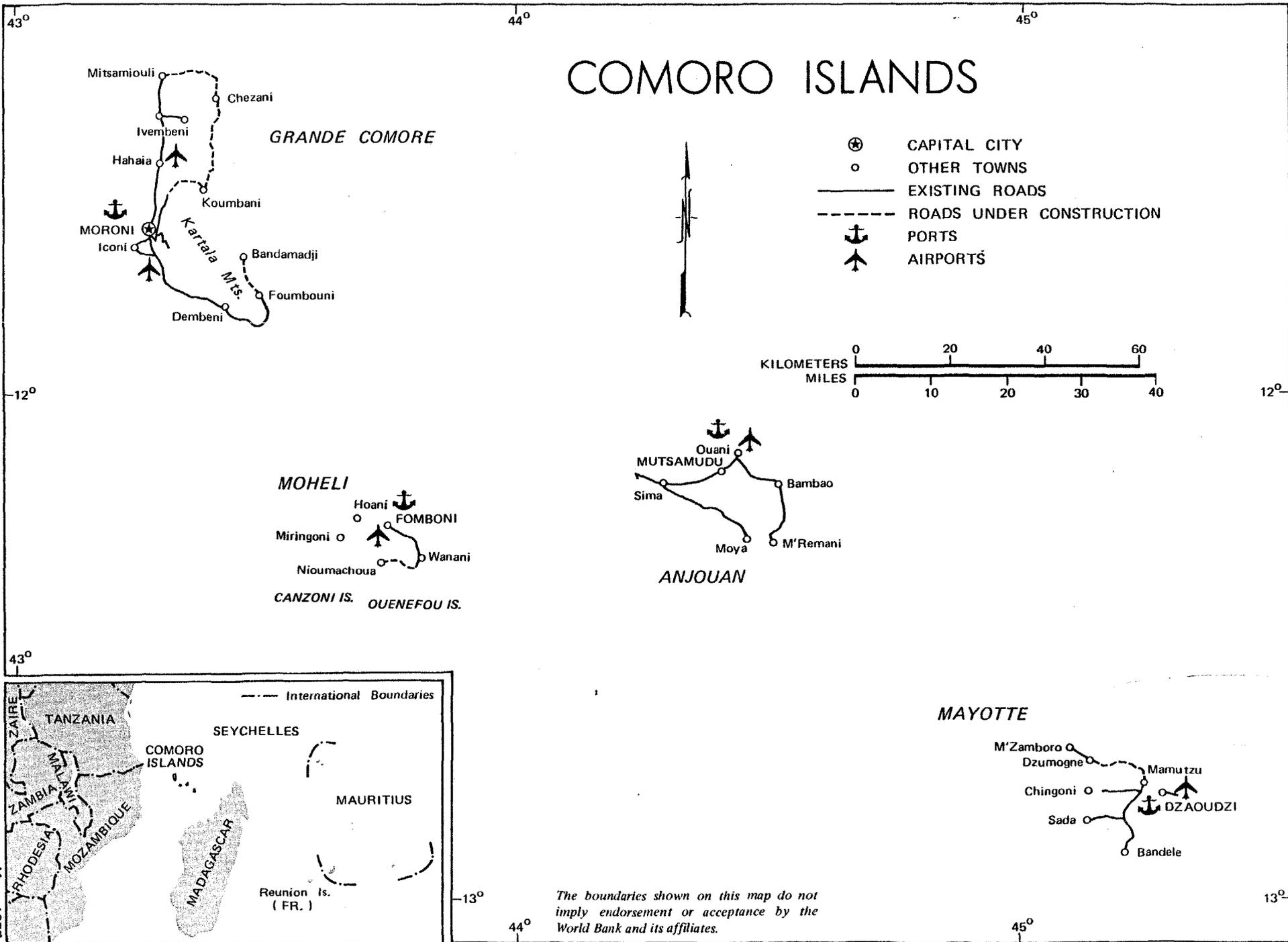
-  Principal city
-  Other towns
- Paved roads:**
 -  Completed
 -  Under construction
 -  Planned
- Earth roads**
 - 
-  Thermolectric and hydroelectric power plants - public and private
-  Port
-  Airport
-  Rivers
-  Elevation contours, meters



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COMORO ISLANDS



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TABLE 3A
SOCIAL INDICATORS DATA SHEET

LAND AREA (THOU SQ KM)	COMOROS			REFERENCE COUNTRIES (1978)		
	1980	1979	MOST RECENT ESTIMATE	GAMBIA	BOTSWANA	MAURITIUS
TOTAL	2.2					
AGRIC.	1.2					
GNP PER CAPITA (US\$)			170.0/Δ	109.0	190.0	350.0
POPULATION AND VITAL STATISTICS						
POPULATION (MID-YR, MILLION)	0.21	0.28	0.3/Δ	0.5	0.6	0.8
POPULATION DENSITY PER SQUARE KM.	96.0	124.0	146.0	81.0	1.0	488.0
PER SQ. KM, AGRICULTURAL LAND	216.0	256.0	302.0	66.0	1.0	746.0
VITAL STATISTICS						
CRUDE BIRTH RATE (/THOU, AV)	48.9	47.9	46.6	43.0	46.1	35.9
CRUDE DEATH RATE (/THOU, AV)	31.5	25.6	21.7	26.2	25.4	8.9
INFANT MORTALITY RATE (/THOU)	..	..	200.0	..	..	57.0
LIFE EXPECTANCY AT BIRTH (YRS)	..	..	50.0	41.0	41.0	63.2
GROSS REPRODUCTION RATE	..	..	2.7	2.8	2.9	1.9
POPULATION GROWTH RATE (%)						
TOTAL	..	..	3.7*	2.2/Δ	1.9	2.4/Δ
URBAN	..	..	6.5	3.7	16.9/Δ	5.1
URBAN POPULATION (% OF TOTAL)	4.6	7.8	9.5	11.5	7.3	49.3
AGE STRUCTURE (PERCENT)						
0 TO 14 YEARS	42.6	41.0/Δ	41.3/Δ	40.1	47.5	41.9
15 TO 64 YEARS	54.1	54.2/Δ	52.3/Δ	56.1	46.9	54.5
65 YEARS AND OVER	3.3	4.8/Δ	3.4/Δ	3.8	5.6	3.6
AGE DEPENDENCY RATIO						
ECONOMIC DEPENDENCY RATIO	0.2	0.8/Δ	0.9/Δ	0.8	1.1	0.8
	..	0.9/Δ	0.9/Δ	..	..	1.6/Δ
FAMILY PLANNING						
ACCEPTORS (CUMULATIVE, THOU)	..	..	..	..	..	49.6
USERS (% OF MARRIED WOMEN)	..	..	..	..	..	..
EMPLOYMENT						
TOTAL LABOR FORCE (THOUSAND)	..	140.0	144.0	..	..	230.0
LABOR FORCE IN AGRICULTURE (%)	..	87.3	87.2	85.0	..	31.5
UNEMPLOYED (% OF LABOR FORCE)	..	..	..	..	..	17.3
INCOME DISTRIBUTION						
% OF PRIVATE INCOME REC'D BY-						
HIGHEST 5% OF HOUSEHOLDS	..	..	..	..	..	..
HIGHEST 20% OF HOUSEHOLDS	..	..	..	..	..	..
LOWEST 20% OF HOUSEHOLDS	..	..	..	..	..	..
LOWEST 40% OF HOUSEHOLDS	..	..	..	..	..	..
DISTRIBUTION OF LAND OWNERSHIP						
% OWNED BY TOP 10% OF OWNERS						
	..	..	..	..	..	78.0/Δ
% OWNED BY SMALLEST 10% OWNERS						
	..	..	..	..	..	2.0/Δ
HEALTH AND NUTRITION						
POPULATION PER PHYSICIAN	18380.0/Δ	..	13000.0	23820.0	14780.0	4220.0
POPULATION PER NURSING PERSON	3500.0/Δ	2290.0	1890.0	2450.0/Δ	1200.0	710.0
POPULATION PER HOSPITAL BED	500.0/Δ	500.0/Δ	490.0/Δ	870.0/Δ	370.0	260.0
PER CAPITA SUPPLY OF -						
CALORIES (% OF REQUIREMENTS)	..	..	..	100.0	87.0	104.0
PROTEIN (GRAMS PER DAY)	..	..	..	63.0	65.0	50.0
-OF WHICH ANIMAL AND PULSE	..	..	..	20.0/Δ	33.0	19.0
DEATH RATE (/THOU) AGES 1-4						

EDUCATION						
ADJUSTED ENROLLMENT RATIO						
PRIMARY SCHOOL	..	..	51.0/Δ	32.0	66.0	79.0
SECONDARY SCHOOL	..	..	7.0/Δ	9.0	0.0	35.0
YEARS OF SCHOOLING PROVIDED (FIRST AND SECOND LEVEL)	..	13.0	13.0	12.0	12.0	14.0
UNATIONAL ENROLLMENT (% OF SECONDARY)	..	..	..	3.5	10.0	1.0
ADULT LITERACY RATE (%)	..	..	20.0/Δ	..	..	..
HOUSING						
PERSONS PER ROOM (URBAN)						

OCCUPIED DWELLINGS WITHOUT PIPED WATER (%)						
	..	..	60.0/Δ	..	..	..
ACCESS TO ELECTRICITY (% OF ALL DWELLINGS)						
	..	..	20.0/Δ	..	9.0	..
RURAL DWELLINGS CONNECTED TO ELECTRICITY (%)						

CONSUMPTION						
RADIO RECEIVERS (PER THOU POP)						
	..	87.0	120.0	108.0	13.0	102.0
PASSENGER CARS (PER THOU POP)						
	..	..	..	6.0	3.0	15.0
ELECTRICITY (KWH/YR PER CAP)						
	5.0	7.0	12.0/Δ	28.0	..	263.0
NEWSPRINT (KG/YR PER CAP)						
	..	..	..	..	..	0.7

SEE NOTES AND DEFINITIONS ON REVERSE

NOTES

Unless otherwise noted, data for 1960 refer to any year between 1959 and 1961, for 1970 between 1968 and 1970 and for Most Recent Estimate between 1973 and 1975.

- Due to immigration population growth rate is higher than the rate of natural increase.
- Mauritius has been selected as an objective country since it is another isolated Indian Ocean Island with a small population and a dominant agricultural sector, has achieved a rapid rate of growth of GDP, diversified its productive base and checked the expansion of its population.

<u>COMBROS</u>	1960	/a	1962; /b	Including midwives and assistant nurses.
	1970	/a	1966; /b	Ratio of population under 15 and 65 and over to total labor force; /c
				Government hospital establishments.
	<u>MOST RECENT ESTIMATE:</u>	/a	1976; /b	Ratio of population under 15 and 65 and over to total labor force; /c
		/d		Government hospital establishments; /e
				As percentage of population.
<u>THE GAMBIA</u>	1970	/a		UN rate of natural increase and IBRD population growth rate not comparable, due to different census bases;
		/b		Including midwives and assistant nurses; /c
				1966, government only; /d
				1964-66.
<u>NOTSUANA</u>	1970	/a		1964-70.
<u>MAURITIUS</u>	1970	/a		Due to emigration population growth rate is lower than the rate of natural increase; /b
				Ratio of population under 15 and 65 and over to total labor force; /c
				Sugar Land only.

June 1, 1977

DEFINITIONS OF SOCIAL INDICATORS

- Land Area (thou km²)
Total - Total surface area comprising land area and inland waters.
Arable - Most recent estimate of agricultural area used temporarily or permanently for crops, pastures, market & kitchen gardens or to lie fallow.
- GDP per capita (US\$) - GDP per capita estimates at current market prices, calculated by same conversion method as World Bank Atlas (1973-75 basis); 1960; 1970 and 1975 data.
- Population and vital statistics:
Population (mid-year million) - As of July first; if not available, average of two end-year estimates; 1960, 1970 and 1975 data.
Population density - per square km - Mid-year population per square kilometer (100 hectares) of total area.
Population density - per square km of agric. land - Computed as above for agricultural land only.
- Vital statistics
Crude birth rate per thousand average - Annual live births per thousand of mid-year population; ten-year arithmetic averages ending in 1960 and 1970, and five-year average ending in 1975 for most recent estimate.
Crude death rate per thousand average - Annual deaths per thousand of mid-year population; ten-year arithmetic averages ending in 1960 and 1970 and five-year average ending in 1975 for most recent estimate.
Infant mortality rate (/thou) - Annual deaths of infants under one year of age per thousand live births.
Life expectancy at birth (yrs) - Average number of years of life remaining at birth; usually five-year averages ending in 1960, 1970 and 1975 for developing countries.
Gross reproduction rate - Average number of live daughters a woman will bear in her normal reproductive period if she experiences present age-specific fertility rates; usually five-year averages ending in 1960, 1970 and 1975 for developing countries.
Population growth rate (%) - total - Compound annual growth rates of mid-year population for 1950-60, 1960-70 and 1970-75.
Population growth rate (%) - urban - Computed like growth rate of total population; different definitions of urban areas may affect comparability of data among countries.
Urban population (% of total) - Ratio of urban to total population; different definitions of urban areas may affect comparability of data among countries.
- Age structure (percent) - Children (0-14 years), working-age (15-64 years), and retired (65 years and over) as percentages of mid-year population.
Age dependency ratio - Ratio of population under 15 and 65 and over to those of ages 15 through 64.
Economic dependency ratio - Ratio of population under 15 and 65 and over to the labor force in age group of 15-64 years.
Family planning - acceptors (cumulative, thou) - Cumulative number of acceptors of birth-control devices under auspices of national family planning program since inception.
Family planning - users (% of married women) - Percentages of married women of child-bearing age (15-44 years) who use birth-control devices to all married women in same age group.
- Employment
Total labor force (thousand) - Economically active persons, including armed forces and unemployed but excluding housewives, students, etc.; definitions in various countries are not comparable.
Labor force in agriculture (%) - Agricultural labor force (in farming, forestry, hunting and fishing) as percentage of total labor force.
Unemployed (% of labor force) - Unemployed are usually defined as persons who are able and willing to take a job, out of a job on a given day, remained out of a job, and seeking work for a specified minimum period not exceeding one week; may not be comparable between countries due to different definitions of unemployed and source of data, e.g., employment office statistics, sample surveys, compulsory unemployment insurance.
- Income distribution - Percentage of private income (both in cash and kind) received by richest 5%, richest 20%, poorest 20%, and poorest 40% of households.
- Distribution of land ownership - Percentages of land owned by wealthiest 10% and poorest 10% of land owners.
- Health and Nutrition
Population per physician - Population divided by number of practicing physicians qualified from a medical school at university level.
- Population per nursing person - Population divided by number of practicing male and female graduate nurses, "trained" or "certified" nurses, and auxiliary personnel with training or experience.
Population per hospital bed - Population divided by number of hospital beds available in public and private general and specialized hospital and rehabilitation centers; excludes nursing homes and establishments for custodial and preventive care.
Per capita supply of calories (% of requirements) - Computed from energy equivalent of net food supplies available in country per capita per day; available supplies comprise domestic production, imports less exports, and changes in stock; net supplies exclude animal feed, seeds, quantities used in food processing and losses in distribution; requirements were estimated by FAO based on physiological needs for normal activity and health considering environmental temperature, body weights, age and sex distributions of population, and allowing 10% for waste at household level.
Per capita supply of protein (grams per day) - Protein content of per capita net supply of food per day; net supply of food is defined as above; requirements for all countries established by USDA Economic Research Service provide for a minimum allowance of 60 grams of total protein per day, and 20 grams of animal and pulse protein, of which 10 grams should be animal protein; these standards are lower than those of 75 grams of total protein and 23 grams of animal protein as an average for the world, proposed by FAO in the Third World Food Survey.
Per capita protein supply from animal and pulse - Protein supply of food derived from animals and pulses in grams per day.
Death rate (/thou) ages 1-4 - Annual deaths per thousand in age group 1-4 years, or children in this age group; suggested as an indicator of malnutrition.
- Education
Adjusted enrollment ratio - primary school - Enrollment of all ages as percentage of primary school-age population; includes children aged 6-11 years but adjusted for different lengths of primary education; for countries with universal education, enrollment may exceed 100% since some pupils are below or above the official school age.
Adjusted enrollment ratio - secondary school - Computed as above; secondary education requires at least four years of approved primary instruction; provides general, vocational or teacher training instructions for pupils of 12 to 17 years of age; correspondence courses are generally included.
Years of schooling provided (first and second levels) - Total years of schooling; at secondary level, vocational instruction may be partially or completely excluded.
Vocational enrollment (% of secondary) - Vocational institutions include technical, industrial or other programs which operate independently or as departments of secondary institutions.
Adult literacy rate (%) - Literate adults (able to read and write) as percentage of total adult population aged 15 years and over.
- Housing
Persons per room (urban) - Average number of persons per room in occupied conventional dwellings in urban areas; dwellings exclude non-permanent structures and unoccupied parts.
Occupied dwellings without piped water (%) - Occupied conventional dwellings in urban and rural areas without inside or outside piped water facilities as percentage of all occupied dwellings.
Access to electricity (% of all dwellings) - Conventional dwellings with electricity in living quarters as percent of total dwellings in urban and rural areas.
Rural dwellings connected to electricity (%) - Computed as above for rural dwellings only.
- Consumption
Radio receivers (per thou pop) - All types of receivers for radio broadcasts to general public per thousand of population; excludes unlicensed receivers in countries and in years when registration of radio sets was in effect; data for recent years may not be comparable since most countries abolished licensing.
Passenger cars (per thou pop) - Passenger cars comprise motor cars seating less than eight persons; excludes ambulances, hearses and military vehicles.
Electricity (kwh/yr per cap) - Annual consumption of industrial, commercial, public and private electricity in kilowatt hours per capita, generally based on production data, without allowance for losses in grids but allowing for imports and exports of electricity.
Newspaper (kg/yr per cap) - Per capita annual consumption in kilograms estimated from domestic production plus net imports of newspaper.

SUMMARY AND CONCLUSIONS

- i. The Comoros Archipelago, located at the northern end of the Mozambique Channel, consists of two large islands, Grande Comore and Anjouan, and two smaller ones, Mayotte and Moheli. Its total population in mid-1977 was 370,000. With 356 inhabitants per square kilometer of arable land, the islands are densely populated relative to their resource endowment. Owing to the rapid natural rate of growth of population (2.7 percent pa) and the influx of Comorians formerly resident in Madagascar and East Africa, the overcrowding is rapidly worsening. Land pressure is particularly acute on Anjouan, such that soil erosion, accentuated by rapid deforestation, is now a serious problem.
- ii. The archipelago has a typical tropical marine climate with occasional cyclones. The islands are all of relatively recent volcanic origin; the slow decomposition of the basalt results in rich laterite soils which support a lush vegetation. The coastline is generally rocky, with few sandy beaches. Despite these common features, each island is distinct in terms of topography, vegetation, economic activity and social structure.
- iii. Over the centuries the islands were invaded by a succession of different groups, mainly of African, Arab, Persian and Malagasy origin. These groups have much intermarried over the centuries with the result that the islands are now inhabited by a relatively homogeneous people, united by a single language (Comorian, which is allied to Swahili) and a dominant Arab Islamic culture. As a consequence of nearly a century of colonialism, a layer of French culture, institutions and administrative practices has been superimposed.
- iv. In a referendum held in December 1974, Grande Comore, Moheli and Anjouan voted overwhelmingly in favor of independence, while 64 percent of those voting in Mayotte were in favor of remaining French. On July 6, 1975, the Comorian Parliament passed a resolution declaring unilateral independence. However, the deputies from Mayotte, who abstained from the vote, immediately petitioned France for Mayotte to continue as a French territory. Subsequently, the French Parliament legislated for the independence of Grande Comore, Moheli and Anjouan as a single State, and provided for a further referendum to determine the future of Mayotte. This was held on February 8, 1976 and resulted in a majority in favor of Mayotte remaining French.
- v. When the Comoros was admitted to the United Nations in November 1975, the new Comorian State was defined as consisting of all the islands of the Archipelago. Nonetheless, the present Government has an effective presence on only three of the four main islands. Mayotte, with 13.5 percent of the archipelago's population, remains under French administration. Mayotte does not have significantly more resources, nor is it more developed or better provided with social services.

vi. The dispute with France over the status of Mayotte has been the dominant political issue in the Comoros since independence. Immediately after independence France suspended its financial aid, which in 1975 amounted to 41 percent of the territorial budget. In addition France ceased to provide a variety of services which formerly had been financed directly through the metropolitan budget. In December 1975 France decided to withdraw all French technical assistance immediately, leaving key services unmanned. However, the French CCCE has continued to administer the monetary authority.

vii. The Comorian State has slowly but steadily gained support internationally; it has succeeded in establishing diplomatic relations with a large number of countries. The People's Republic of China has been the first country to set up a resident mission, while the main source of financial help has been the Arab countries. The Comoros was admitted to the Lome Convention in mid-1976 and became a member of the World Bank in October 1976.

viii. The internal political scene has been troubled. Less than one month after independence the country's first President, Ahmed Abdallah (who had been Prime Minister for three years prior to independence), was overthrown by a coalition of the opposition parties. Following a period of uncertainty, an interim Constitution was adopted at the end of 1975 and soon afterwards Ali Soilih was elected President by a newly established National People's Council. Thus, the traditional leadership which dominated Comorian politics during the period of internal self-government has been replaced by younger men seeking swift and radical change in the social and institutional structure of the country. A new Constitution was approved by the National People's Council in April 1977 and President Soilih has been reappointed as Head of State.

ix. At independence the society was largely feudal in structure, with a few dominant landowning families, but otherwise without great disparities in wealth. The population, the vast majority of whom live in the rural areas, is for the most part extremely poor, ill-educated and malnourished. GDP per capita is estimated at about US\$160 per annum (1977 current prices). The poor diet and particularly the deficiency in animal protein shows itself in the high infant mortality (over 200 per thousand) and in the high incidence of kwashiorkor. In early 1977, 18,000 refugees arrived from Madagascar following communal riots in that country, placing yet greater pressure on resources. Comoros' troubles were further exacerbated when the volcano on Grande Comore erupted in April this year, dispossessing an estimated 500 families.

x. Apart from a small soft-drinks bottling plant, a sawmill, a brickworks and a small soap factory, the only industrial activities are the distillation of ylang-ylang (used in the manufacture of perfume) and furniture manufacture, mainly at the artisanal level. Tourism, too, is negligible and the potential is limited owing to the scarcity of good beaches. Thus, the Comoros is primarily an agricultural country. Agriculture contributes nearly 40 percent of GDP and practically all export earnings. Trade and transport activities amount to 27 percent of GDP, whereas public services make up under 10 percent.

xi. Comoros belongs to the Franc Zone. Its currency is issued by a currency board (Institut d'Emission) managed by the French Caisse Centrale de Cooperation Economique (CCCE). Development finance for the private sector has until now been provided by an organization called CREDICOM, jointly owned by the CCCE and the Comorian Government. The only commercial bank is the Banque Commerciale des Comores, a subsidiary of the French-owned Banque de Madagascar et des Comores, which operates mainly in France. Negotiations are in progress for the State to acquire full ownership of both institutions which are to be merged to form the Banque Nationale des Comores.

xii. The economy is dependent on four principal agricultural exports: essence of ylang-ylang, copra, vanilla and cloves. These are grown in the coastal areas up to an altitude of 500 meters, partly on plantations and partly by small holders. Livestock and food crop production which, with the exception of coconuts and bananas, is mainly concentrated on the higher land, has been neglected and is now insufficient to feed the population. Annually some 50 kg of rice per person are imported, together with most of the wheat-flour, meat, milk, and sugar consumed on the islands. However, in recent years export earnings have been sufficient to finance only about half the cost of imports. In the past the large trade deficit has been mainly financed by the inflow of aid.

xiii. Fishing provides animal protein for the coastal people, but fish is rarely eaten by those living in the interior. The waters around the islands are not particularly rich in fish, and traditional fishing methods are not well-adapted to catching the tuna found in the open ocean several miles offshore.

xiv. Comoros lacks the physical infrastructure necessary for development. In particular, the road system is very inadequate. Many villages are not linked to the main road system, or at best are connected by tracks which are only usable by four-wheel drive vehicles. Road improvements are a prerequisite to agricultural development; feeder roads are especially needed to facilitate the marketing of food crops grown in the interior.

xv. The islands' port infrastructure is rudimentary. Only small vessels can approach the existing quays at Mutsamudu in Anjouan, and Moroni and Grande Comore. Long-distance oceangoing ships must lie to offshore and be unloaded by dhow; during the cyclone season this procedure is dangerous and ships are reluctant to call at the islands. Most of the freight is first sent to Dar-es-Salaam or Majunga from where it is transshipped. Goods are often pilfered during transshipment. The Government wishes to develop Mutsamudu as an international port, but the present volume of traffic is not yet large enough to justify any major investment in port development.

xvi. An airport capable of accommodating jumbo jets has been recently constructed at Hahaia on Grande Comore. In addition, each island has an airport suitable for DC4s. Air Comores, operating two DC4s, and Air Madagascar link the islands with Majunga, Tananarive, Dar-es-Salaam and Mombasa. Public power supplies are available only in Moroni and Mutsamudu. In Anjouan,

in particular, there is a shortage of power. Furthermore, the high cost of electricity encourages the use of wood as an alternative energy source and thereby accentuates the problems of deforestation. Water supplies are problematical on Grande Comore only, owing to the absence there in perennial water courses.

xvii. All children attend koranic schools until they are able to read (but not necessarily to understand) classical Arabic. Only half of the children of school age attend primary schools and less than 20 percent enter secondary school. Enrollments, however, have grown markedly between 1970 and 1975, doubling at the primary school level and tripling at the secondary level. Two thirds of the primary school teachers are untrained, while the secondary school system is almost entirely dependent on expatriate teachers. Little vocational training took place until 1974 when ILO helped to establish a center for artisan training at Anjouan. Over the past ten years some 400 Comorians have received university training abroad, but less than 10 percent have returned home on completion of their studies. Thus, over the years the Comoros has been deprived of most of its ablest and best trained people.

xviii. The active population is estimated to have been 184,000 at the beginning of 1977, of whom less than 7 percent were in salaried employment. In 1976 the largest employer by far was the Government, providing over one third of all jobs. However, in April 1977 the Government, faced by severe shortage of funds, dismissed most of its employees, and intends to rehire only a minority.

xix. Medical services are rudimentary in the extreme. In 1976 there was only one fully qualified doctor per 40,000 inhabitants. There are two hospitals (one in Grande Comore and one in Anjouan), five health centers with a total of 663 beds and 45 health posts 1/. The major scourge is malaria; 80 percent of the population carry malarial parasites in their blood. Life expectancy is 49 years.

xx. The suspension of French technical and financial aid, and the departure of most of the French community - over 1,500 persons in all are said to have left - had an immediate and dramatic impact on the economy. 1976 saw a sharp drop in commercial activities and an important number of companies ceased operations. However, an evaluation of the current situation is rendered hazardous by the absence of reliable data for 1976.

xxi. Tentative estimates indicate that GDP reached a peak of US\$71 million in 1974, having grown at between 6 and 7 percent in real terms over the previous five years. As a consequence of the events surrounding independence, real GDP fell 13 percent in 1975 and 9 percent in 1976. Because of the high rate of population growth (including net immigration) GDP per capita grew only 2-3 percent pa in real terms in the period 1970-74; it reached over US\$200 in 1974, but fell sharply thereafter to US\$184 (in current prices) in 1976 and is expected to be no higher than US\$160 in 1977. The high rate of growth in the early seventies was in response to an investment rate which

1/ Excluding Mayotte.

averaged about 30 percent of GDP. The level of investment inevitably plummeted in 1975 and 1976, and is not likely to recover in 1977. In addition to traditional house construction, it has consisted mainly of public works.

xxii. Comoros' trade deficit, which had grown considerably in the early seventies, was sharply reduced in 1976 by a drastic curtailment of imports. This was partly a consequence of the departure of the French, but even the importation of essential goods, such as spare parts for vehicles, was also greatly reduced. As soon as investment revives, the trade gap will reappear and, as in the past, will have to be financed by the inflow of financial aid.

xxiii. No records are kept of factor and non-factor service payments, nor of private capital transfers. Funds move freely between France and the Comoros, and it is likely that the private sector has transferred to France as much capital as could be realized. On the other hand, traders who had previously enjoyed substantial commercial credit have been required to finance their 1976 imports, largely with their own funds held in France. At the end of 1976 Comoros' official holdings of foreign exchange stood at about US\$10 million, equivalent to over six months of imports; but this relatively favorable situation was largely due to the receipt of substantial Arab aid in the second half of 1976 which had not yet been fully spent. Total public debt stood at US\$32 million at December 31, 1976, US\$15 million of which was undisbursed. Debt service amounted to 5 percent of export earnings in 1976.

xxiv. Comoros is faced with a budgetary crisis, accentuated by the necessity of taking over those services which had previously been directly financed by France; this entailed absorbing into the Comorian civil service nationals who had been employed by the French administration. The new State managed initially by cutting back drastically on most activities (e.g. by closing secondary schools), drawing down stocks and delaying a number of payments, including, on occasion, salaries. Appeals worldwide for help first brought assistance early in 1976 in the form of free food and medical supplies. Then, in mid-1976, the Special Arab Aid Fund for Africa (SAAFA) provided a concessionary and unconditional loan of US\$10 million and the People's Republic of China have made available US\$10 million in the form of suppliers' credit. Total public expenditure fell from US\$40 million in 1975 to about US\$21 million in 1976. However, a very large part of expenditure met directly by France went for the salaries of highly paid expatriate personnel and to grants for university students.

xxv. The present budgetary situation at the beginning of 1977 was critical. Almost all the SAAFA loan had been exhausted and practically no Treasury reserves remained uncommitted. Domestic revenue in 1977 is unlikely to exceed CFAF 1.2 billion (US\$5.0 million) 1/ which is well under the total annual cost of wages and salaries in the public service at the 1976 rate of expenditure. The situation is markedly worse now than it was a year ago when an urgent appeal for emergency assistance was sent to the United Nations.

1/ Excluding the proceeds of sale of food aid.

xxvi. Despite the formidable financial and manpower crisis which has confronted the Government over the past two years, a start has been made in tackling fundamental issues. The Government has initiated two major reforms. First, it is attempting to modernize feudal society through land reform and the institution of a new system of local government. Unexploited land in the possession of large landowners is to be transferred to the landless and every farmer is to hold at least one hectare. In future the basic unit of government will be the moudiria; the latter groups villages containing an average of 6,000 people and is to be the focus for self-help and local initiative. The moudiria is to be responsible for all local services.

xxvii. The second major reform envisaged is a fundamental reorganization of the public service, which over the years has become swollen with political appointees of questionable competence. In the past, the salaries of civil servants consumed such a large part of domestic revenue that little remained to finance other supporting recurrent costs. To meet the situation, salaries were halved in early 1977. In April 1977, a decision was taken to disband the permanent civil service and only those civil servants considered efficient are being rehired on contract terms. The central administration is to be restructured and reduced, with as many services as possible being placed under the control of the Governors of each island, leaving at the center a minimum core of services.

xxviii. On economic policy, the Government appears moderate. The private sector is not to be nationalized unless an enterprise is clearly working against the national interest. The State will generally seek at most a minority participation in key enterprises. Foreign investment is welcomed. No immediate or radical change in the present monetary arrangements is proposed.

xxix. The Government's strategy for development is two-pronged. First priority is being given to agricultural development; in particular to expand food crop production, small livestock and fishing to reduce dependence on food imports and to increase agricultural exports, thus narrowing the trade deficit. At the same time the Government is greatly concerned to provide the minimum infrastructure of roads and ports which is now lacking. These two major objectives are closely inter-linked. The educational system is being reformed to make the teaching more relevant to local conditions and more practical. Particular stress is to be given to agricultural studies.

xxx. Agricultural productivity is very low and considerable scope exists for improvements. Moreover, traditional farming practices are leading to such rapid soil erosion that, unless changes are soon introduced, little cultivable land will remain by the end of the century. To tackle this problem effectively, an integrated program for rural development needs to be planned covering, for example, the introduction of improved farming methods, reforestation, feeder road construction, improved social services, and handicraft and fisheries development.

xxxi. The implementation of the Government's policy objectives calls for a planning and administrative capacity which does not at present exist. No planning is being done at all, though the UNDP is committed to providing a five-man planning team, which hopefully will be in place before the end of 1977. Also, the Kuwait Fund has agreed to finance a four-man project preparation team, three of whom are in post. In addition, technical assistance is required in practically every field at both the professional and the technical levels. In all at least 150 specialists are required, without counting the 200 teachers who are also needed.

xxxii. The financial implications of the Government's proposed programs have yet to be assessed. It is clear, however, that domestic resources are insufficient to run even minimal services and although Government's domestic revenue amounts to no more than 13 percent of GDP, there are few ways for the Government to increase its revenues, at least in the short-term. If Comoros is to achieve an average 5 percent rate of growth of GDP over the next ten years, investment must be of the order of 25 percent of GDP, most of which must be in the public sector, at least initially. The Government should seek to obtain some US\$40 million in external aid to be disbursed on projects over the next three years and a correspondingly higher sum in commitments. To provide an adequate administrative base for this, the Government needs to secure, at a minimum, US\$10 million of budgetary aid annually for the period immediately ahead, but which may be gradually reduced over a 10- to 15-year period as local revenues grow.

xxxiii. The Government has not yet confronted the issue of explosive population growth and the resultant pressure on arable land and forestry resources. If present trends continue, the population will reach 560,000 by 1990 and 800,000 by the year 2000. The situation is critical, such that the introduction of a program of family planning deserves serious consideration. Yet, whatever steps are taken in future to reduce the growth in population, new ways of employing the labor force outside the agricultural sector must be found. The only real long-term possibility would appear to be the establishment of export-oriented industries.

INTRODUCTION

1. The Comorian State achieved independence in July 1975 and was admitted to the United Nations in November 1975. The country became a member of the World Bank in October 1976. One month later a Bank economic mission visited the Comoros to assess the economic situation and prospects for development; this report is mostly based on the mission's findings.

2. In admitting the Comoros to membership of the United Nations, both the Security Council and the General Assembly explicitly defined the new Comorian State as consisting of all the islands of the archipelago. Nonetheless, the present Government has an effective presence on only three out of the four main islands. Mayotte, with 13.5 percent of the archipelago's population, has chosen to remain under French administration 1/. The Comorian Government regards Mayotte as being under French occupation. It may be noted that Mayotte does not have a significantly superior resource endowment than the other three islands, nor is it more developed or better provided with social services.

3. This report covers all the islands of the archipelago to the extent that information could be obtained. Indeed, much of the data for the period prior to independence is only available in an aggregate form relating to the whole archipelago. Since independence no statistics on Mayotte have been published, so for the period after July 1975 the data in the report generally refers only to Anjouan, Grande Comore and Moheli. Because of the distinct character of each island, the report describes, wherever relevant and feasible, conditions on each island and the contribution each makes to the economy of the archipelago.

1/ On December 14, 1976 the French National Assembly legislated to make Mayotte a French "territorial community".

PART A: THE SETTING

I. THE COUNTRY

General Features

1. The Comoros Archipelago consists of four main islands spread out on a northwest-southeast axis at the northern end of the Mozambique channel. Their total population numbered about 344,000 in mid-1976. The largest, Grande Comoro (1,148 km²) lies at the most northerly end of the archipelago, 280 km from the African coast. Mayotte (374 km²) lies furthest to the south at the opposite end of the archipelago, 200 km from Grande Comoro and 310 km from the northwest coast of Madagascar. Midway between these two lie Anjouan (424 km²) and Moheli (220 km²). The islands have a total surface area of 2,166 square kilometers.
2. Situated half-way between the equator and the tropic of capricorn, the archipelago is subject to a tropical marine climate, with the seasons determined mainly by the monsoon winds. ^{1/} Hot and humid weather brought in by the northeasterly monsoon between November and April gives way to a relatively cool, dry season for the remainder of the year, when the prevailing wind comes from the southwest. The average monthly temperature varies by only 5°C, between 23°C and 28°C along the coast and average rainfall is over 2 m. The highlands are distinctly cooler and wetter than the coast; indeed, the variations by altitude are greater than between seasons. As is usually the case with small mountainous islands, there are a number of well defined micro-climates. Cyclones, occasionally of devastating strength, occur during the hot season. The last major cyclone occurred in December 1950, when 524 people were killed and 750,000 coconut trees were uprooted.
3. Although the islands are all of relatively recent volcanic origin, they each have distinct geological, topographic and climatic features which in turn determine the vegetation. Many of the differences between islands are attributable to the extent to which the three main volcanic phases have marked each island. The islands do not have any geological links whatsoever with either Madagascar or the neighboring coastal region of Africa and do not appear to possess any mineral deposits of economic interest. The coastline is generally formed of rough rocky black lavas and basalts, inhospitable to shipping and tourists alike, though there are a few attractive sandy beaches where small boats may safely land.
4. The slow decomposition of the volcanic rocks results in rich lateritic soils which support a lush vegetation in most parts of the islands. Along the coast, up to an altitude of 500 m, are found the trees providing the main export crops -- ylang-ylang (perfume essence), cloves and coconuts -- with the vanilla vine, maize, cassava and banana plant growing in their shade. The

^{1/} Data on the climate is given in the Statistical Annex, Table 10.1.

pawpaw, avocado, coffee, cocoa, mango and breadfruit trees also abound in this zone. The higher land is used for the production of food crops - cereals, beans, potatoes and other vegetables. Here maintain rice, though not well suited to the environment, is widely grown. On the higher slopes cultivation gives way to primary forest, which is much degraded in the areas close to human habitation.

5. The main settlements are small, old Arab towns with attractive stone-built houses, narrow streets and open markets. There are numerous small retail outlets and workshops where traditional craftsmen ply their trades. The many mosques and the occasional minaret give each place a special character. Outside the towns the population is mostly grouped in small villages scattered irregularly across the islands, depending on the availability of fertile land. Some have strongly built stone houses, but more often the houses are made of a less substantial wooden frame with roof and sides thatched with coconut fronds.

6. Three types of land holdings may be clearly distinguished. First, there are colonial company estates, which have been partially developed as plantations for export crops. These occupy about 20 percent of the cultivable land but, particularly in Anjouan, are now being rapidly transferred to, or in some case simply taken over by, small farmers. Second, 20 percent of the cultivable land is owned by private individuals who have registered holdings, the largest extending over 100 to 200 ha, but the majority being about 25 ha in size. The remainder of the cultivable land is in the form of village reserves, allocated according to customary law. Each extended family has its traditional plot which over the years has had to support a steadily increasing number of people. There is no communal land in the strict sense of the term. As a consequence of the land hunger, a system akin to sharecropping has evolved on both the company estates and private holdings. The forest land is owned partly by the state and partly by the colonial companies.

Grande Comore

7. The major island, Grande Comore, is 67 km long and 27 km wide. It is the most recent of the islands, formed by two volcanos: one in the north (La Grille), which is extinct and eroded, and one in the south (the Kartala) rising to 2,361 m, which is still active; consequently, there are areas where vegetation has yet to take root. The most recent lava flow occurred in April 1977, destroying two villages and a small town, thereby dispossessing some 500 families. A wide plateau stretches between the Kartala and La Grille at an altitude of 600 to 700 m. The terrain is much dissected by the many lava flows and, as a consequence, there are a large number of small villages. The soils are shallow and the surface is rocky, well suited to the cultivation of tree crops. On the high land reaching up to the lip of the Kartala's caldera, there is an abundant rain forest, which supports an old sawmill. Despite frequent rainfall, particularly on the higher slopes, there are no perennial streams; the soils are too thin and permeable to prevent the rapid seepage of surface water into the volcanic rock. The population is thus forced to depend for water supplies

mainly on rain catchment tanks, although there is an underground reservoir of fresh water floating over salty water which has seeped in from the sea. Underground water has been tapped to supply the capital, Moroni. There is no coral reef and the coast, lacking large inlets, affords little protection to shipping.

Anjouan

8. Anjouan is the second most important island in terms of land area, population and economic activity. It is a picturesque triangular block of land, some 40 km from apex to base. Three mountain chains stretch out from a central peak, Mtingui (1,575 m high), thereby forming three well defined peninsulas: Sima pointing to the west, Nioumakele to the south, and Jimilime to the north. The central massif is well watered, whilst the tips of the triangle are relatively arid and denuded. Older than Grande Comore, Anjouan has developed a good cover of clay soil which support perennial streams. Owing to over-intensive cultivation using poor agricultural techniques, such serious erosion has occurred that important areas, particularly in the Nioumakele, are no longer suitable for crops. Furthermore, the forest in the main water catchment areas have been so degraded as to threaten the island's perennial water supplies. The land slopes sharply into the sea along most of the coast, offering no good natural harbours. The coral reef is close to the shore and is fully exposed at low tide. The sea bed dips steeply away to a depth of 500 m only a mile offshore. The island's capital, Mutsamudu, is situated on the northern coast; it is also the main port of the archipelago. Much of the best land used to be owned by the Societe Bambao, a colonial plantation company specializing particularly in the production of ylang-ylang essence. However, in recent years the company has sold much of its land to its former employees.

Mayotte

9. Mayotte was the first island to appear and is already considerably weathered. Stretching 39 km north-south and 22 km wide, it has a north-south mountainous spine now much indented, with four main summits between 500 and 600 m in altitude. Most agricultural activity takes place on two plains, one situated in the center of the island and the other in the northeast. In certain areas a brown clay is found which is particularly fertile. There has been sufficient time for a coral reef to develop around the island some distance from the shore, creating a large, well protected stretch of water which affords excellent shelter to shipping and a habitat favorable for sedentary fish. There are two gaps in the reef through which oceangoing vessels may pass. To the east of Mayotte, at the same distance from the shore as the reef, lies the islet of Pamanzi (10 km²), linked by a 2 km dike to a 5 ha rocky outcrop, known as Dzaoudzi, on which the French built the original administrative capital of the Comoros. The capital was moved to Moroni in 1958, causing an economic recession in Mayotte.

Moheli

10. Only 30 km long and 12 km wide, Moheli is the smallest of the four main islands in the archipelago. The central mountain chain lies along a northwest-southeast axis, reaching 860 m at its highest point, but without any pronounced features. The hillsides are not particularly steep, and the valleys are wide and fertile. Nonetheless, there are signs of gully erosion which has occurred despite the thick forest cover. The coast is without deep inlets and includes some broad sweeps of sandy beach. A strong sea swell creates difficulties for shipping. There are a number of small islets on the southern side of the island. The population is mainly dispersed in small villages, each with a few dozen huts. There are only two important settlements: Fomboni, the capital, situated on the northern coast, and Nioumachoua on the southern side of the island.

2. THE PEOPLE

Their History

11. Over the centuries the islands were invaded by a succession of different groups. These have much intermarried and little is now known of the original settlers. The oldest established people to which reference is commonly made were known as Cafres and are considered to be closely related to the Bantu of Central and Southern Africa. The Cafres even at an early date must have become mixed with small groups of Arab, Persian and Indonesian origin. The earliest Arab influx for which there are definitive records was that of the Shiraz from the Persian Gulf about 1000 years ago. A second and possibly more important wave of Shiraz settlers took place in the 15th century at about the same time the islands were being discovered by early European explorers. The Arabs brought with them slaves taken from the African coast whose descendants are called Makoas. Although also of Bantu origin, the Makoas are physically distinguishable from the Cafres. Comorians of Malagasy or Indonesian origins, though much mixed with the Arab and Bantu peoples, may nonetheless be divided into three distinct ethnic categories: the Oimatsaha, who live mainly in the highland of Anjouan and probably arrived some years before the main Arab invasion; the Antalotes, whose origins are obscure; and the Sakalavas whose descendants are found mostly in Mayotte. There are still a few isolated villages along the Mayotte coast where the main language is a Malagasy dialect, but generally the population of the archipelago speaks a single language, Comorian, closely allied to Swahili. It is normally written in Arabic script.

12. In the past, owing to the difficulty and danger of interisland travel, movement between the islands was limited and each island developed its own character and autonomous institutions. Nonetheless, Arab culture became firmly established throughout the archipelago and Islam is the dominant religion, constantly renewed through the work of the Koranic schools which all children attend for at least three years. European influence was slight until the end of the 19th century and, even during the colonial era, Christian missionaries made little headway.

13. The political history of the islands, from the 15th century until their final subjection to French rule at the turn of the 20th century, was that of a continuous and frequently violent struggle for power, both within and between the islands. The main actors in these conflicts were the sultans. Each island had one or more sultans at the apex of a feudal structure centered on the small towns. In the 18th and 19th centuries, the islands were frequently plundered by Malagasy raiders who arrived in fleets of outrigger canoes and who on each occasion carried off large numbers of Comorians as slaves. In the case of Mayotte the population was so reduced that, when the French took over in 1843, there were only 3,000 inhabitants. The other islands succeeded in maintaining a measure of autonomy from France for another half century; Grande Comore and Moheli became French protectorates in 1886, whereas the Sultan of Anjouan finally submitted only in 1912. For the next 35 years, the Comoros islands were administered by France jointly with Madagascar as a single overseas territory. During the colonial period emigration was actively encouraged by the Government as a means of overcoming population pressures, in the absence of alternative measures to provide employment.

General Characteristics of the Population

14. Based on an extrapolation of the results of censuses held in 1958 and 1966, the population of the Comoros in mid-1976 is estimated to have been 344,000. The vast majority are the descendants, much intermarried, of the various immigrant groups described above. In addition, there are small groups of expatriate Indians, Malagasy and Europeans. These arrived only in recent years, but their economic role is highly disproportionate to their numbers. The distribution of the population by island and the density is given in Table 1. If account is taken of the islands' poor resource endowment, all except Moheli are relatively heavily populated, though land pressure is particularly acute in Anjouan.

Table 1: POPULATION BY ISLAND, MID-1976

Island	Population ('000)	Density per km ²	Density per km ² of cultivable land
Anjouan	121	285	448
Grande Comore	164	143	410
Mayotte	46	123	192
Moheli	13	59	100
Archipelago	344	154	331
(For comparison):			
Mauritius	867	465	815
Burundi	3,700	134	219

Source: 1966 Comoros Census Report and IBRD estimates.

15. The relative overcrowding of Anjouan is illustrated by the 1966 census data on the size of settlements. Thirty-two percent of Anjouanais were living in settlements with more than 1,000 inhabitants, whereas the corresponding figures for Grande Comore and Mayotte were 14 and 13 percent, respectively. 1/ As already noted, the broken nature of the terrain and the absence of surface water supplies has also discouraged the appearance of large villages in Grande Comore. The general dispersion of the population well reflects the character of the main economic activities -- food crop production in the highlands, and fishing and commerce along the coast. The villages as they have grown have tended to spread out along the main access roads.

16. The two largest towns are Moroni in Grande Comore and Mutsamudu in Anjouan. These were founded by Arab settlers and have grown as commercial centers handling the bulk of the islands import-export trade. Moroni has also developed substantially in recent years as the administrative center for the most rapidly growing sector, namely government services. Moroni's population has more than tripled in 20 years, from about 6,000 in 1957 to a present figure of about 22,000. In the same period, Mutsamudu has grown from 4,500 to over 14,000 2/.

17. The population of the archipelago is growing rapidly and, as a consequence, about 44 percent of the population is under 15 years of age. The proportion 60 years or over is as low as 6 percent. The active adult population, defined as those aged between 18 and 60, must support dependents numbering well over half the population. The average life expectancy at birth is about 50 years.

18. The exact rate of population growth is difficult to determine, owing to the inadequacy of the available demographic data. The 1966 census report indicated the crude birth rate for the archipelago to be 44.6 births per thousand which was slightly lower than the figure (45.7) retained for 1958. 3/ The rate varied between 40 per thousand in Grande Comore and 49 per thousand in Mayotte. The crude death rate also fell during the intercensal period, the figures for 1958 and 1966 being 23.4 per thousand and 19.0 per thousand, respectively. The crude death rate varies, too, among the islands, the lowest rate in 1966 being in Grande Comore and Moheli with 16.5 deaths per thousand, and the highest in Anjouan and Mayotte with 20.5 deaths per thousand. Infant mortality as recorded by the 1966 census was 47 per thousand, but this must be regarded as a substantial underestimate, owing to a tendency not to declare the deaths of infants. According to a World Health Organization adviser, the true figure is likely to be over

1/ See Statistical Annex, Table 1.5.

2/ These estimates assume that the populations of the towns have grown by 6.5 percent pa since the 1966 census, which is a projection of the growth trend of the previous decade.

3/ However, for projection purposes IBRD recalculated birth and mortality rates on the basis of fertility and mortality data obtained from the 1966 census. Hence, the figures for 1966 given in the Statistical Annex, Table 1.6, are somewhat higher than those recorded in the 1966 census report.

200 per thousand. In the absence of any marked improvement in health services, infant mortality is probably not much lower today than ten years ago.

19. Whereas the rate of population growth, derived from the birth and death rates noted above, appears to be about 2.6 percent per annum, the growth rate calculated on the basis of the population enumerated in 1958 and 1966 was apparently 3.7 percent per annum, a figure too high to be explained by natural increase. One cause of the exceptional high growth rate is the return of migrant workers estimated at about 12,000 between 1958 and 1966. However, the return of migrants is not a sufficient explanation for the unusually large increase in the enumerated population in the intercensal period; it is probable that the coverage of the 1966 census was about 5 percent better than that held in 1958.

20. Statistics on the expatriate Comorian community are not available. It is believed that in all possibly 80,000 to 100,000 Comorians are resident abroad, mostly in Madagascar and East Africa. It has been estimated that there were some 40,000 Comorians in Tanzania in the early sixties, since when there has been a steady flow back to the Comoros. According to official Malagasy estimates 43,000 Comorians were living in Madagascar in 1972, but between January and March 1977, following clashes between Comorians and Malagasy in Majunga, the Comorian Government repatriated some 18,000 of its nationals. This, together with the natural increase between 1976 and 1977, implies that the present (mid-1977) population of the archipelago is 370,000.

21. Migration between islands has also occurred as may be seen from the 1966 census data. While 99 percent of the residents of Anjouan were born there, only 71 percent of the residents of Moheli were born on the island itself. The corresponding figures for Grande Comore and Mayotte were 97 percent and 89 percent. It is evident that Anjouan and Grande Comore, the two most densely populated islands, have lost a part of their populations to Mayotte and Moheli. Whereas the majority of Anjouanais migrated to Mayotte, most Grande Comorians who left went to Moheli. The settlement of Anjouanais in Mayotte has given rise to some resentment on the part of the Mahorais and since independence many Anjouanais have returned home. Migration to Moheli is partly attributable to the Societe Bambao which imported labor to assist in the development of their estates there.

3. THE POLITICAL SITUATION

Recent Political and Institutional Developments

22. In 1947 the Territory of the Comoros was made financially and administratively independent of Madagascar. In a referendum eleven years later, the Comorians opted to remain French and in 1962 the territory was granted a measure of internal self-government responsible to a local elected parliament. Dissatisfaction grew at the slow rate of political and economic progress and, when a further referendum was held in December, 1974, the residents of Grande Comore, Anjouan and Moheli voted overwhelmingly

in favor of independence. However, 64 percent of those voting in Mayotte (but less than a majority of the electorate) were in favor of maintaining political ties with France. On July 6, 1975, the Comorian Parliament passed a resolution unilaterally proclaiming the whole archipelago independent. The deputies from Mayotte, who had not participated in the vote on the resolution, immediately petitioned Paris to remain under French administration. On November 8, 1975, the UN General Assembly, on the recommendation of the Security Council, voted to admit the new Comorian State, defined explicitly as including all the four islands of the archipelago. However, the French Parliament subsequently legislated for the independence of Grande Comore, Anjouan and Moheli as a single state and provided for a referendum to be held to determine the future of Mayotte. This was held on February 8, 1976 and resulted again in a majority voting in favor of Mayotte remaining under French administration.

23. The continued French presence in Mayotte has been the dominant political issue since the Comoros achieved independence. Immediately after the unilateral declaration of independence France suspended all financial aid, which in 1974 had financed 22 percent of the territorial budget, 54 percent of all current expenditures and a large part of public investment. The one exception was the rice subsidy; early in 1976 a final payment of the subsidy promised for 1975 was made, enabling traders to repay credit for rice imports obtained from the Banque Commerciale des Comores. In November 1975, following a Comorian Government request that French military personnel be repatriated, France decided to withdraw immediately all French technical assistance, leaving many key services virtually unmanned (e.g. hospitals, airports, secondary schools, water supplies, etc.). These services had in fact been without an operational budget since July 1975. Only the Caisse Centrale de Cooperation Economique remained, the staff of which has continued to administer the Currency Board (Institut d'Emission). The Comorian State has slowly but steadily gained recognition abroad; it has succeeded in establishing diplomatic relations with a large number of countries and has signed the Lome Convention, thus becoming an associated state of the European Economic Community. The main sources of financial aid has been the Arab countries and the People's Republic of China.

24. Since independence the internal political scene has been troubled. Less than one month after independence the country's first President, Ahmed Abdallah, who had been President of the Governing Council during the three previous years, was overthrown by a coalition of opposition parties. In the four months that followed the country was ruled by a National Revolutionary Council; however, for a while confusion reigned owing to indecision among the leaders, which ended when the Council adopted a new Constitution at the end of 1975. On January 2, 1976, Ali Soilih was elected Head of State by a newly established nine-member National People's Council 1/; President Soilih had become prominent at the time of the August 1975 coup d'etat. As a consequence of these

1/ Conseil National Populaire.

changes, the traditional feudal leadership which had dominated Comorian politics during the period of internal self-government has been replaced by younger men seeking rapid change in the social and institutional structure of the country. In April 1977, the National People's Council approved a new Constitution, and subsequently President Soilih was reconfirmed as Head of State. The new Constitution 1/ embodies the fundamental reform of the administration described below.

The Fundamental Reform

25. Independent Comoros inherited governmental structures modeled on those of France. The system was highly centralized and hierarchical, ill-adapted to the needs and conditions of the Comoros. Comorian staff were mostly poorly or unsuitably trained. There was a small administrative elite with an academic training and an excessive number of subordinate staff whose appointment had been based more on political considerations than on merit. There was a serious shortage of middle grade executive and technical personnel.

26. The Government has embarked on a fundamental reform of the administration 2/ aimed at reducing the extent of bureaucracy, making the central authorities more responsive to the needs expressed by each village community and breaking the feudal structures in order to modernize Comorian society. The French system of prefectures and cantons is being replaced by a more decentralized administration. The islands have been subdivided into districts, or bavous. The bavou, which is the principal unit of local Government, is administered by a Liwali, who has executive responsibility for all government services operating in the bavou (including the police but excluding the army). Each island constitutes an administrative province known as a wilaya and is placed under the control of a Mouhafidh.

27. The lowest unit of Government is the moudiria, grouping together on average 6,000 people living in one or more villages. In all there will be 55 moudirias replacing the 30 cantons which existed previously. Progressively greater responsibility for local services, such as law and order, primary and lower secondary education, health and sanitation, marketing of crops and agricultural extension work is to be transferred to the moudiria by the central government. The necessary technical staff will be allocated to the moudiria by the central government and will be placed under the control of a moudir. The moudirs are the local agents of the Government, nominated and trained by the central authorities. Stress has been placed on youth; all moudirs must be under 35 years of age, and may be men or women. They will be assisted by newly chosen village headmen (or Hakim-Oimouji) who must not be more than 45 years old.

1/ A note on the new Constitution is attached as Annex III.

2/ The reform is described in a document entitled La Reforme Fondamentale issued in June, 1976.

28. The intention is to furnish each moudiria with a central building to which a rural junior secondary school (college rural) will be attached. The main building will contain a simple courtroom and offices, together with refrigerated storage for agricultural produce. It will have its own small electricity generator, unless it can be connected to an existing power supply. So far construction of about half the moudiria buildings has commenced, using as far as possible voluntary labor mobilized by the groups of Revolutionary Youth (Jeunes Revolutionnaires) that have been formed in most villages.

29. The central government is being streamlined. The process of decentralization when completed will leave only a core of central services in Moroni. These are to be restructured, but the form of the new organization of government departments has yet to be clarified. However, it has been stated that parastatal corporations will be created to take over from government departments those services which the Government considers can be better run in a situation where the management has a reasonable degree of financial and administrative autonomy; included in this category are ports and telecommunications, civil aviation and radio broadcasting. A special role is attached to the latter in the absence of any newspaper or any official press bulletin; the radio is almost the sole means of disseminating information on official decisions and on government policy generally. The Government has plans to install stronger transmitters and to provide communal radio listening points in each village.

30. Concomitant with the administrative reorganization, the Government intends to reform radically the judicial system. Under the colonial regime the administration of justice was complex, costly, inconvenient and slow. A greatly simplified system is to be introduced by establishing primary courts in each moudiria with authority to settle swiftly all routine civil disputes and to handle simple misdemeanors.

31. The detailed implementation of these basic reforms have yet to be worked out. The mobilization of the villagers will not be easy after so long a period of neglect. The use of compulsion to obtain free labor for the construction of moudirias, associated with the, at times, arbitrary and poorly controlled activities of the revolutionary youth groups, has caused resentment. Provisional estimates have put the initial capital cost of the moudiria at a modest CFAF 15 million (US\$60,000) and the annual recurrent cost of between CFAF 1 and 2 million. The latter includes only the salary of the moudirs and two assistants each, and a small sum for operating expenses. In practice the eventual cost is likely to be much higher; for example, the cost of the junior secondary schools will be considerable, and even running and maintaining an electric generator and refrigerated store in each moudiria may pose a financial problem.

4. PLANNING FOR DEVELOPMENT

Past Plans

32. As an overseas territory of France, prior to independence the Comoros were integrated into the French planning system. Consequently, a

series of "five-year plans" were prepared, following the same planning cycle as that adopted in France. These plans amounted to little more than summary statements of the Administration's development policies and the related public investment program for the planning period. The most recent of the documents was the VIth Plan, covering the years 1971 to 1975. In 1974 the Government published a review of the progress made in the implementation of the VIth Plan and set out proposals for the VIIth Plan. 1/ In particular, stress was placed on vocational training, on educational reform and on the diversification of productive activities. The VIIth Plan was never finalized.

33. The pre-independence plans were generally inadequate documents, lacking any detailed macro-economic or sectoral analysis. Also they failed to set out in sufficient detail the Administration's investment proposals; projects were described perfunctorily, costs were not properly defined or phased, and no attempt was made to assess the skilled manpower required to implement the plan.

The Need for Planning

34. Since independence no plan has been prepared, but many of the projects identified in the draft VIIth Plan remain valid. However, the institutional and political framework has radically altered and it is now urgent that a new plan document be drafted, describing the policies and objectives of the independent Government and detailing the proposed projects for their achievement. Such a plan should be pragmatic in approach, specifying the actions necessary for plan implementation. It should clearly define the means (in terms of both finance and skilled manpower) required for plan implementation. The energies of the planners should be mainly deployed on project identification and preparation.

35. A prerequisite to good planning is reliable data describing each sector of the economy. At present the Government lacks a trained statistician and practically no statistics are currently being collected. Urgent steps should be taken to obtain external technical assistance in this field. First, the statistics office should ensure that data currently being collected as a by-product of the administrative process (e.g. statistics relating to the customs department, labor, transport, education, health, etc.) are reliably assembled. Second, a program should be drawn up for the collection of key new data required for planning. It is particularly important to obtain better information on prices, balance of payments and population. For example, the margin of error in present population estimates is considerable 2/ and, since the very rapid growth in population is putting heavy pressure on existing resources, better information on population must be obtained if a satisfactory development plan is to be prepared.

1/ Bilan Provisoire du VI Plan et le Project du VII Plan (1976-1980).

2/ See paras. 18-19.

36. The Government has requested the United Nations Development Program to provide a planning team to assist in elaborating a new development plan and in preparing projects. At present, the National Planning Department 1/ (NDP) located in the Prime Minister's office, is staffed by a Commissioner of Planning (who is an administrator) and an assistant statistician. The composition and location of the UNDP planning team has yet to be decided. It is urgent that the team, which should include a general macro-economist/planner as team leader, and two or three sectoral economists covering agriculture, industry, infrastructure and human resources, be recruited without delay in order to provide the NPD with a core of experienced specialists. To underline its importance and to strengthen its authority, the NPD should be placed directly under the President, but the individual sector specialists will need to work very closely with the executing Ministries. To assist in project preparation, the Kuwait Fund has agreed to furnish, initially for two years, a small technical assistance team. At the end of 1976 two experts who had arrived were reviewing agriculture and infrastructure projects. At least, initially, to avoid duplication and to improve coordination, it would be desirable for all the various planning specialists to work from within the NPD.

Strategy for Development

37. The political turmoil which surrounded the achievement of independence and the subsequent institutional changes have preoccupied the authorities. Moreover, the budgetary crisis caused by the withdrawal of French aid has made it difficult for the Government to mount an investment program. The situation was further complicated in early 1977 by the precipitous return of over 16,000 Comorians who had been living in Madagascar. Understandably, the main efforts of the Government have been directed, on the one hand, toward seeking external support and recognition, and on the other hand toward maintaining order internally.

38. It is remarkable that, faced with so many problems, the Government has nevertheless embarked on a variety of reforms aimed at modernizing Comoros' society and at promoting rapid economic and social development. The most important reforms so far proposed have been the reorganization and decentralization of the administration, described above, and the introduction of a system of basic education 2/. Also, ceremonial marriages and funerals, which involved ostentatious waste, have been banned, thus opening the way for the mobilization of domestic savings for investment. In the past families would save for years just to be able to entertain lavishly on these special occasions.

1/ Commissariat du Plan.

2/ See paras. 223-232.

39. The Government's development strategy is essentially two pronged--the improvement of agricultural production and the provision of better infrastructure. These two objectives are closely interlinked. In particular, priority is to be given to the expansion of food production--that is, the development of food crops, livestock and fishing--to reduce the country's dependence on food imports. At the same time the Government recognizes the need to boost the production of export crops in a further effort to narrow the yawning trade deficit. On the infrastructure side, the improvement of roads and ports is seen as a prerequisite for all other development. The provision of electricity is considered essential for the development of industries. The reform of the educational system is also an essential part of the strategy, since it aims at providing the population with the skills people need to become more productive. For this reason, basic education will have a marked bias towards practical agricultural studies. The translation of this strategy, which seems logical and consistent with the Government's broad political objectives, into an investment program capable of attracting external financing requires a capacity to plan and implement specific projects which the Government as yet hardly possesses. The first step must be for the Government to complete as rapidly as possible its proposed reorganization of central government services and to staff the National Planning Department 1/.

40. As one measure to increase agricultural productivity, reform of the present land tenure system is envisaged. The main thrust will be towards land consolidation, rather than land redistribution. In fact, as already mentioned, the large estates have been much reduced in recent years, as the plantation companies have adopted a policy of selling land to outgrowers, in order to concentrate company activities on the processing and marketing of export crops. The main problem to be tackled by the land reform is the small size of most holdings, many of which lie at a great distance from the farmer's home. Often a peasant owns several scattered holdings. Under the proposed reform, each farmer is to be allocated one hectare which may not be sold, leased or used for sharecropping.

41. While the Government's policies for reforming the administration and for transforming Comoros' feudal society (which involves unseating the islands' traditional and religious leaders) are revolutionary, its attitude towards private enterprise is, in contrast, moderate. The Government sees an important role for the private sector, welcomes foreign investment, and is generally opposed to the State taking a majority participation in private enterprises. The only case of outright nationalization so far has been that of the Shell Company, which imported and distributed petroleum products; but this occurred after the Malagasy Government had already nationalized Shell Madagascar, which owned the installations in the Comoros. Also the Government has cancelled Societe Bambao's forestry concession on Grande Comore as

1/ See para. 36.

a natural resource conservation measure 1/. The present policy is for the state to become involved in business activities only where the private sector is not performing adequately. An example is Comores Denrees, which was established immediately after independence to assure the importation of essential goods. The company has gradually expanded its activities, in particular, as the Government's agent responsible for handling the importation and distribution of goods purchased under the various external aid agreements.

1/ See para. 169.

PART B: STRUCTURE OF ECONOMIC ACTIVITIES AND RECENT TRENDS

1. SALIENT FEATURES OF THE ECONOMY

Production, Income and Investment

42. The Comoros' smallness, isolation and poor resource endowment explain the archipelago's evident lack of development. For generations the more adventurous Comorians have left the islands to seek a better livelihood abroad. Yet those resources which do exist are poorly developed; for a country largely dependent on agriculture, the backwardness of the farming methods of the vast majority of peasants is noteworthy.

43. Up-to-date national accounts for the Comoros do not exist. Preliminary estimates of the main sectoral aggregates covering the period 1964 to 1968 have been published, but since then no further work has been done. From the fragmentary data collected by the mission, tentative estimates relating to the period 1968-75 have been made. These depend heavily on the various production coefficients derived in the 1964-68 period and must therefore be treated only as rough approximations, indicating the structure of the economy and recent trends in sectoral growth.

44. GDP (at market prices) ^{1/} reached a peak of nearly US\$70 million in 1974, having grown at about 6 percent in real terms over the previous five years mainly in response to the high level of public investment. As a consequence of the economic events surrounding independence, real GDP fell 13 percent in 1975 and 10 percent in 1976. Real gross domestic income per capita grew by about 2 percent annually in the period 1970 to 1974, to reach over US\$220, only to fall sharply thereafter to about US\$176 (in current prices) in 1976. Owing to an influx of immigrants in early 1977, the population of the archipelago jumped 8 percent over the previous year and by mid-1977 the population is estimated at 370,000 with a per capita income of about US\$160 (in 1977 prices). Although no data is available on factor payments, it is reasonable to assume that net profits remitted abroad in 1976 were negligible and that GNP was only marginally lower than GDP. Disposable income was, however, boosted by transfer receipts from the large number of Comorians working overseas.

^{1/} These figures exclude salaries paid to expatriate technical assistance personnel.

Table 2: GROWTH OF PRODUCTION AND INCOME

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^P
GDP (current market prices, bill. CFAF)	8.0	9.4	10.0	11.1	16.8	15.0	14.5
GDP (1975 market prices, bill. CFAF)	13.8	15.1	15.6	15.8	17.2	15.0	13.5
Income effect of changes in terms of trade (bill. CFAF)	0.1	-0.4	-0.3	0.2	0.1	-	0.6
GDY (1975 prices; bill CFAF)	13.9	14.7	15.3	16.0	17.3	15.0	14.1
GDY per capita (1975 prices '000 CFAF)	49.2	50.3	50.8	51.4	53.7	45.0	40.9
GDP per capita (1975 prices US\$)	177	182	202	231	223	210	172
Population ('000)	282	292	301	311	322	333	344

P = provisional.

Source: Mission estimates.

45. Agriculture dominates the Comorian economy; most of the population live in the rural areas and agriculture contributes nearly 40 percent of GDP and practically all export earnings. In contrast industry, including the processing of agricultural products, accounts for no more than 7 percent of GDP. The wholesale and retail trade, and the related transport activities amount to 27 percent of GDP, whereas public services contribute under 10 percent, disregarding expatriate salaries (estimated at CFAF 1.4 billion in 1975).

Table 3: SECTORAL COMPOSITION OF GDP
(in current prices and in
billions CFAF)

	<u>1970</u>	<u>1975</u>	<u>Percentage Real Annual Growth</u>
Agriculture	3.3	5.7	2.2
Industry	0.5	1.1	3.5
Construction	1.2	2.0	-2.9
Electricity and Water	.	0.1	11.9
Trade	1.9	3.8	4.8
Transport	0.1	0.2	4.1
Rent	0.4	0.9	2.4
Other Services	<u>0.7</u>	<u>1.2</u>	<u>-3.7</u>
Total	8.0	15.0	1.8

. less than CFAF 500,000,000.

Source: Mission estimates.

46. The precise contribution to GDP made by each island is not known. However, Table 28 shows the value of export earnings by island which is indicative of the relative monetary incomes, even though agricultural exports and directly related trade and processing contributes only 12 percent of GDP. The differences in per capita income among the three larger islands are not great; only Moheli with 4 percent of the population appears to be substantially more productive, but the island enjoys fewer services, such as health and electricity supplies. Anjouan is the poorest island, with serious overcrowding and the least favorable prospects for development.

47. Financial aid, received mainly from the European Development Fund and from France, prior to independence enabled the Comoros to achieve a relatively high level of investment. Over the period 1968 to 1975 investment averaged 25 to 30 percent of GDP, the bulk being public investment in infrastructure. The low level of private investment, which has been mostly in buildings, may be closely correlated with the lack of industrial development. The relatively high incremental capital output ratio in recent years (8:1) reflects the bias towards infrastructure and house construction; indeed it would be even higher, but for the positive

impact of road construction on agricultural development and the fact that a substantial amount of unrecorded land development took place. Finally, as is to be expected in a situation where the Government receives substantial budgetary aid, domestic savings are negligible, even negative.

Table 4: USE OF RESOURCES
(in billions CFAF)

	<u>1974</u>	<u>1975</u>
<u>Origin of Resources</u>		
GDP	16.8	15.0
Net inflow of resources	5.4	4.5
<u>Use of Resources</u>		
Private Consumption	15.0	14.0
Public Consumption	2.1	1.9
Investment	5.1	3.6
<u>Domestic Saving</u>	-0.3	-0.9

Source: Mission estimates.

Employment, Wages and Prices

48. The 1966 census recorded 65 percent of the active population as engaged in farming or as farm workers. Approximately one fifth were reported as being in salaried employment, or 33 percent more than were registered with the Department of Labor. At the beginning of 1977 the active population (defined as those aged 15 to 60) is estimated to number some 184,000 persons, of whom fewer than seven percent were in salaried employment. Salaried employment grew by about 12 percent between 1970 and 1974, only to fall markedly over the next two years 1/. All told, it is likely that there are now less than 12,000 salaried workers compared with 18,500 in 1966.

1/ In 1966 only 75 percent of those enumerated by the census as employed in the private sector were actually registered by the Department of Labor. Registered salaried employment grew from 12,700 in 1970 to 14,200 in 1974, but these figures did not include either the 2,200 permanent civil servants or casual laborers who were equivalent to another 1,000 fully employed workers.

Table 5: OCCUPATIONS OF THE ACTIVE POPULATION, 1966

	<u>Percentages</u>
Farmers and family farm workers <u>a/</u>	71
Fishermen	2
Salaried agricultural workers	4
Non agricultural employers and self-employed	10
Civil servants and police	3
Other private sector employees	9
Others	<u>1</u>
TOTAL	<u>100</u>

a/ The 1966 Census figure adjusted to include those not otherwise employed.

Source: Institut National des Statistiques et des Etudes Economiques, Paris.

49. In 1975 approximately one third of the registered salaried work force was engaged in agriculture, compared to one half five years ago. This decline in salaried agricultural employment is largely due to the sale of plantation land to smallholders. Substantial areas formerly cultivated with hired labor are now farmed on a family basis. Owing to this decline, at the time of independence the public service had become the largest employer with some 5,000 employees, counting not only permanent civil servants, but also contractual workers and daily paid labor. In 1977 the estimated domestic government revenue is insufficient to meet the wage bill of such a large work force and, consequently in April, the President announced that as many as 3,500 workers had been given dismissal notices.

Table 6: REGISTERED SALARIED EMPLOYMENT
(end of year)

	<u>1970</u>	<u>1974</u>	<u>1976^e</u>
Agriculture and Processing	6933	4310	3200
Industry	278	535	300
Construction	1392	1869	1000
Trade and banking	666	1233	1000
Transport	483	644	500
Services <u>a/</u>	<u>2957</u>	<u>5603</u>	<u>3000</u>
TOTAL	<u>12709</u>	<u>14194</u>	<u>9000</u>

e = estimated

a/ Excludes permanent civil servants (who numbered 1,674 in 1970 and some 2,200 in 1974 and 1976) and casual employees.

Source: Department of Labor

50. The distribution of salaried employment between the islands correlates closely with population distribution, only if the permanent employees of the Government are disregarded. If the latter are taken into account, Grande Comore has proportionately more employment than the other islands, since Moroni is the seat of government. The present plan to decentralize government activities will help correct this imbalance. During the period 1965 to 1974 employment fell on Anjouan owing to the decline in plantation employment, whereas employment grew steadily on Grande Comore.

Table 7: REGISTERED SALARIED EMPLOYMENT a/ BY ISLAND
(percentage distribution)

	<u>1965</u>	<u>1974</u>
Grande Comore	35	49
Anjouan	45	32
Mayotte	13	14
Moheli	<u>7</u>	<u>5</u>
	<u>100</u>	<u>100</u>

a/ Excluding permanent civil servants.
Source: Department of Labor.

51. The total wage bill doubled between 1970 and 1974 to just under CFAF 2.5 billion, with that of the private sector rising more slowly than public expenditure on wages and salaries. In 1976 the public sector accounted for over half of the total wage bill. Although the cost of living in Moroni has risen by over 50 percent since 1973, the basic minimum wage has remained unchanged at CFAF 24.6 an hour (10 US cents) or CFAF 4,200 (US\$17 per month). Such a wage is hardly sufficient to support even the worker himself, let alone his family. Consequently, most private employers pay salaries above the minimum.

Table 8: AVERAGE ANNUAL SALARIES IN SELECTED SECTORS
(in thousands CFAF)

	<u>1970</u>	<u>1973</u>
Agriculture	28	38
Industry	116	112
Construction	78	225
Transport	52	109
Private Sector (average)	53	70
Public Sector (average)	72	139

Source: Department of Labor.

52. In the past average salaries in the public sector have been consistently higher than those in private sector. This is explained by the larger proportion of higher qualified employees; on a grade-by-grade basis the civil service was not significantly better paid. Following the administrative reorganization initiated in April 1977, civil service salaries have been limited, at least provisionally, to the range CFAF 10,000 to CFAF 30,000 per month. The consequences of this action have not yet become clear.

53. Systematic information on retail prices is available only for the period 1972 to 1975. A cost-of-living index calculated by the mission for these years shows that over the long term there is a reasonably close correlation between increases in the cost-of-living and increases in import prices. In 1974 the large volume of exceptionally high-priced rice imports distorted the import price index, but a consumer rice subsidy paid by France cushioned the impact of this expensive rice on the cost of living. In 1976 the monthly retail price survey was discontinued; given the importance of price changes in the analysis of economic data, it is important for the Statistics Office regularly to collect a wide range of information on prices.

Table 9: SELECTED PRICE INDICES

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Import prices	64	61	63	76	110	100
Export prices	69	72	71	68	103	100
GDP deflator	59	62	64	70	98	100
Cost-of-living	..	..	63	67	88	100

Source: Mission estimates.

2. MONEY, BANKING AND CREDIT

The Monetary System

54. During July 1977, Comoros' financial institutions were being reorganized, as a result of which Comoros will have only two financial bodies - the Institut d'Emission des Comores and the Banque Nationale des Comores. The latter is being formed by merging two pre-existing institutions, namely the Banque Commerciale des Comores and a development bank called CREDICOM. The present monetary arrangements are similar to those of France's existing overseas territories. The Comoros belongs to the Franc Zone and the currency in circulation--the Comorian franc--is exactly equivalent to the CFA 1/ franc. It is fully convertible into French francs at the fixed rate of one CFAF to 0.02 French francs. The currency is issued by the Institut d'Emission des Comores (IEC), a form of currency board created in December 1974 to take over the currency management functions previously performed by the Banque de Madagascar et des Comores. France provided the IEC with an initial capital of CFAF 250 million in the form of a grant.

55. It is normal practice for the monetary arrangements of ex-French territories to be renegotiated at the time of independence, but owing to the strained relations between the two countries, only limited changes have been agreed informally and became effective on July 15, 1977. For this reason the statutory provisions of the IEC remain more restrictive than for example, those of the West African Monetary Union (UMOA) 2/, to which six former French territories belong. In particular, while a UMOA member government is entitled to a credit line from the monetary authority equivalent to 20 percent

1/ Communauté Franco-Africaine.

2/ Union Monétaire Ouest-Africaine.

of its tax receipts during the preceding budgetary year, the Comorian Government may only draw up to 15 percent of its tax receipts from the Institut d'Emission. Moreover, while credit is made available to UMOA members on a permanent basis, in the Comoros Government's borrowing rights are limited to 240 days per calendar year. The first time the Comorian Treasury borrowed from the Institut d'Emission was in early 1977; as of June 30, 1977 the IEC had advanced CFAF 131 million to the Treasury, which in theory had to be repaid within four months. Finally, it should be noted that whereas UMOA members' assets held in French francs are guaranteed in SDRs against devaluation, the IEC's operations account is not so protected.

56. The IEC's main office was transferred from Paris to Moroni in July 1977 and a Comorian has been appointed Managing Director. Its president is also a Comorian. Expatriate personnel, on secondment from the Caisse Centrale pour la Cooperation Economique (CCCE), are providing technical assistance. IEC's liquid assets are held in an "operations account" at the French Treasury, which is remunerated at one percentage point less than the official discount rate of the Bank of France. The IEC's statutes include stringent provisions governing overdrawing on the operations account, that is, the borrowing of foreign reserves from the French Treasury. In these circumstances, the IEC must reduce its rediscount ceiling by successive tranches of 20 percent every 90 days. Such a situation has not arisen since independence; the operations account has consistently shown a positive balance in contrast to previous years.

57. The present currency arrangements are at best provisional and could be terminated at short notice by the French Authorities. No Comorian has any specialized knowledge of the technical aspects of currency management or central banking, and the Government is therefore not equipped to handle monetary issues. Thus, urgent steps should be taken to select suitable officials both for overseas training and for secondment to the IEC for in-service training. Since Comoros has joined the International Monetary Fund, advantage could also be taken of the Fund's advisory services to help prepare for the changes which may eventually be made in the present arrangements.

58. Prior to July 1977, the only commercial bank operating in the Comoros was the Banque Commerciale des Comores (BCC), which was a fully owned subsidiary of the French-based Banque de Madagascar et des Comores (BMC). The latter itself had a branch in the Comoros until mid-1974 when its activities there were devolved to the newly created BCC. Since the BMC's assets in Madagascar were nationalized in 1975, its operations, other than those in the Comoros, are now based entirely on its head office in Paris and two branches in France (one in Toulon and the other in Marseilles). In October 1976 the French insurance company Drouot acquired a controlling interest in the Bank, and since then Drouot has been negotiating with the Government for the purchase of the share capital.

59. BCC has been the main source of short-term credit in the Comoros, the bulk of which was allocated for trade. Besides its main office in Grande Comore, BCC operated two days a week in Anjouan, every second week in Mayotte and occasionally in Moheli. BCC's monopoly position has been a

cause for some concern to the Government. The possibility of inducing another foreign bank to open a branch in the Comoros has been considered, but the few contacts made so far have been discouraging. Comoros' domestic banking business appears too limited to interest possible competitors to BCC, and the Archipelago lacks the skilled manpower and communications infrastructure which would be essential if it were to attract an offshore banking industry. As a partial measure, the Comorian Treasury has been empowered to accept sight deposits from individuals and to manage a checkbook system. The funds thus obtained are pooled with other treasury assets. But this is hardly a satisfactory solution, particularly as the Treasury is not staffed to perform a banking function and, in any event, does not possess the appropriate institutional framework. The Post Office does not maintain savings accounts, but an estimated CFAF 30 million is held by Comorians with the Malagasy Post Office Savings Fund 1/. When Madagascar left the Franc Zone these funds were blocked for a while, but it has since been agreed by the two Governments that the funds may be transferred to a Checking and Savings Fund 2/ which the Government proposes to establish. The detailed administrative and legal arrangements for the scheme have yet to be elaborated.

60. The Comorian Development Bank 3/ (CREDICOM) was created in 1974 to take over the CCCE's lending activities to the private sector. It was jointly owned by CCCE and the Comorian State, with its equity capital equally divided between the two shareholders. CREDICOM gave short-, medium- and long-term credits to all sectors of the Comorian economy. Also, it took participations in ongoing or new commercial and industrial ventures, and was entitled to finance directly and to manage housing schemes. However, the bulk of its lending was medium-term, (particularly in building materials, housing and industry) and long-term (mainly for housing, industry and hotels). The main industrial venture financed by CREDICOM has been a soft-drinks bottling plant established at the beginning of 1975 in Anjouan. Since its inception CREDICOM's main source of finance was the CCCE, which made available CFAF 734 million in medium- and long-term loans at concessionary rates of interest. 4/ Also, the Government placed a US\$10 million loan from the Special Arab Aid Fund for Africa (SAAFA) 5/ with CREDICOM, but since this was a sight deposit, no opportunities could be found to reinvest the funds in the Comoros; instead they were reinvested in Paris.

1/ Caisse de Comptes de Cheques Postaux.

2/ Caisse d'Epargne.

3/ Societe de Credit pour le Developpement des Comores.

4/ Between 3 and 4-1/4 percent.

5/ See para. 100.

61. Under an agreement reached in May 1977 between the Comorian State and CCCE, the State acquired on July 1, 1977 at face value the CF AF 50 million share capital in CREDICOM held by CCCE. The State also proposed to purchase BCC from its present shareholders and, once the transaction has been completed, to merge the BCC with CREDICOM under one management. The new institution, to be called Banque Nationale des Comores, will have two distinct departments, one providing development finance and the other performing normal commercial banking functions. The CCCE has agreed to provide a specialist in development finance and an expatriate commercial banking specialist will also be hired. A Comorian has been appointed General Manager.

62. The IEC has not exercised any formal control over the commercial banking sector, since no Comorian banking legislation has been enacted and both the BCC and CREDICOM were incorporated under French banking law. The IEC can only intervene in a limited way to influence the level and distribution of credit provided by the banking system. Its main tool in this regard is its rediscounting facility.

Recent Trends in Money and Credit

63. Between 1965 and 1974 money supply grew by about 12.5 percent per annum to CF AF 2.3 billion, the increases being largest towards the end of the period. Despite a 12.5 percent growth in the money in circulation in 1975, money supply fell 14 percent owing to a sharp drop in bank deposits occasioned by the departure of the French community and the postponement by France of a rice subsidy payment which traders had expected to receive in the second half of 1975. By September 1976 demand deposits had recovered to their 1974 level, reflecting not only the delayed receipt of the rice subsidy, but also general destocking by importers. In the latter half of 1976 there was a slight upturn in economic activity, following higher export earnings and an increase in public sector expenditure made possible by Arab aid.

Table 10: ASSETS AND LIABILITIES OF THE BANKING SYSTEM 1/
(in millions CFAF; end of year)

	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>April 1977</u>
<u>Assets</u>							
Net credit to the private sector	864	1,470	1,375	2,687	2,127	1,119	1,055
Net credit to the Government	119	134	235	274	163	172	377
Net foreign assets	<u>149</u>	<u>-237</u>	<u>507</u>	<u>-587</u>	<u>520</u>	<u>2,057</u> 2/	<u>1,340</u>
Total	1,132	1,367	2,117	2,374	2,810	3,348	2,772
<u>Liabilities</u>							
Currency in circulation	800	959	975	1,179	1,325	1,319	1,523
Demand deposits	492	617	1,045	1,162	698	712	590
Other items	160	209	97	33	787	1,317	659

1/ Includes BCC, CREDICOM, IEC and the Treasury acting as a depository.

2/ This does not include the outstanding portion of the SAAFA loan deposited by the Government with CREDICOM, which in turn was deposited with the CCCE in Paris.

Source: Institut d'Emission.

64. Short-term credit to the private sector grew very rapidly between 1971 and 1974, only to fall sharply in 1975 and in the first half of 1976 as a consequence of the events surrounding independence and the withdrawal of French aid. By May 1976 credit to the private sector stood at only CFAF 660 million, a level in nominal terms well below that in 1971 and markedly lower in real terms. Approximately one half consisted of advances to traders and most of the remainder was seasonal agricultural credit. Credit to all the other sectors together amounted to only 4 percent of the total, compared to 46 percent one year earlier. The marked recovery in the second half of 1976 was mostly the result of a revival in government expenditure made possible by the receipt of the SAAFA loan.

65. The decline in credit to the commercial sector in 1976 was particularly large; advances to traders fell from a peak of CFAF 1.8 billion in December 1975 to around CFAF 0.5 billion in September 1976. This was partly a reflexion of the sharp decline in imports, but was also a result of the BCC's deliberate policy to reduce credit to the private sector. Traders were forced to finance a much larger part of imports with their own funds which had been held in France. As a consequence, the amount of trade bills discounted for BCC by the IEC fell from CFAF 1.3 billion in December 1975 to a negligible figure in September 1976. Over the same period foreign reserves rose by a corresponding amount. Thus, the BCC moved quickly after independence to protect its position. Whereas at the time of independence its CFAF 2 billion of credit to the Comorian economy was matched by only CFAF 0.8 billion in deposits, by September 1976 BCC had reduced its lending to CFAF 0.9 billion, while deposits had climbed to just over CFAF 1 billion. Thus, BCC had succeeded in covering its liabilities in the Comoros and had, in addition, accumulated a small reserve held in France.

Table 11: DISTRIBUTION OF SHORT-TERM CREDIT TO THE PRIVATE SECTOR
(outstanding, end of period, in millions CFAF)

<u>Sector</u>	<u>June 1975</u>	<u>December 1975</u>	<u>June 1976</u>	<u>December 1976</u>	<u>April 1977</u>
Agriculture	54	189	57	302	240
Trade	978	1,768	662	657	686
Industry	564	3	6	16	28
Construction	202	89	16	97	30
Hotels & restaurants	8	15	13	3	3
Transport	78	29	18	14	11
Services	2	10	6	9	4
Other	<u>43</u>	<u>15</u>	<u>7</u>	<u>22</u>	<u>11</u>
Total	1,928	2,118	786	1,119	1,012

Source: Banque Commerciale des Comores.

66. The principal source of medium- and long-term credit for the private sector has been CREDICOM. The sole loan in this category made by BCC was for CFAF 10 million in support of the Anjouan soft-drink plant. CCCE has provided development finance to the parastatal and public sector; its only lending in 1975, other than its assistance to CREDICOM, was a CFAF 300 million loan to Electricite des Comores and a CFAF 20 million loan to the National Commerce Office; no loans were made in 1976 other than to CREDICOM. The bulk of CREDICOM's loans were for house construction. Very little was lent to the productive sectors. Only 10 percent of its lending has been for industry, and very little of that for craftsmen and handicrafts. As at the end of 1976, only 8 loans had been made for agriculture, which underlines the virtual absence to date of medium- and long-term credit for agricultural development, a situation calling for an early remedy.

Table 12: MEDIUM- AND LONG-TERM CREDIT
(outstanding, end of period,
in millions CFAF)

	<u>1974</u>	<u>1975</u>	<u>1976</u> <u>September</u>	<u>1977</u> <u>April</u>
Medium-term	152	277	283	302
of which:				
- Agriculture and fishing	13	13	11	11
- Industry	-	37	59	95
- Construction	72	87	74	73
- Building materials	56	120	120	117
Long-term	182	244	276	251
of which:				
- Agriculture & fishing	28	32	25	18
- Industry	50	55	72	75
- Hotels & restaurants	56	63	60	40
- Construction	45	90	117	126
Not specified	5	5	8	33
Total	<u>339</u>	<u>526</u>	<u>567</u>	<u>586</u>

Source: CREDICOM.

67. Initially, the IEC's rediscount rate was fixed at only 2 percent, a level insufficient to enable it to meet its operating expenses. When in October 1975 the Institut raised the rate to 5 percent, BCC increased its basic lending rate from 5.75 to 8 percent, to which is added a commission of up to one percent. CREDICOM, however, has held its lending rates unchanged at 5 to 8 percent for short- and medium-term loans, and 6 to 10 percent for

long-term lending. Loans from the CCCE are generally at concessionary rates varying from 2.5 to 5 percent. Present interest rate policies provide little incentive to savers. BCC did not pay any interest to depositors until March 1976; since then 3-month deposits of more than CFAF 100,000 are remunerated at 5 percent, but current accounts have still to pay a service charge. In this respect, sight deposits with the Treasury appear competitive, as no service charge is made. The situation should improve with the establishment of the proposed Savings Fund, to be operated in collaboration with the Post Office, with an outlet in each moudiria; interest is to be paid at the rate of 3.5 percent per annum, which is equal to the rate currently paid to Comorian depositors by the Malagasy Post Office. Once the new Banque Nationale des Comores is firmly established consideration should be given to raising interest rates substantially to help mobilize domestic resources.

3. EXTERNAL TRADE AND PAYMENTS

Comoros' Structural Trade Deficit

68. In recent years, Comoros' foreign trade has registered a persistent large deficit. The size of the deficit has fluctuated partly owing to the irregularity in ship arrivals, particularly after the closure of the Suez Canal in 1956. If a 3-year moving average is applied to the trade data to reduce the impact of this accidental factor, two trends become evident. In the second half of the 1950s the rate of coverage of imports outlays by export earning rose slowly to 86 percent in 1959. In contrast, in the 1960s and the early 1970s the downward trend was continuous, bringing the adjusted coverage ratio to a bare third in 1974. This trend reflects the increasing extent to which imports were being financed directly or indirectly by external aid in the 1960s, whereas aid flows were much less important in the 1950s. The coverage improved slightly in 1975, when importers started to destock, and abruptly during the first eight months of 1976 when a favorable export performance combined with a drastic reduction in imports, owing to the withdrawal of French aid, brought external trade almost into balance. Receipt of substantial external financial aid once again, this time from Arab sources, permitted a much higher level of imports in the final four months of 1976.

Table 13: SUMMARY OF FOREIGN TRADE a/
(in millions CFAF)

	<u>1956 b/</u>	<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1975</u>
Exports fob	459	731	952	1,380	2,132
Imports cif	586	870	1,641	2,433	4,586
Trade deficit	127	139	689	1,053	2,454
Coverage ratio (%)	78	84	58	57	47

a/ 3 year moving averages.

b/ The first year for which data is available is 1955.

Source: Customs Department.

Export Performance

69. The structure of Comorian exports has varied greatly in the past. Sugar was the most important export commodity in the 19th and early 20th centuries. Output reached a peak of 4,000 metric tons in 1880, a considerable quantity in relation to the population of the time. By 1937, the year in which the sugar-mill was closed, production had declined to 400 metric tons. More recently, copra-oil exports, which in 1958 amounted to 480 tons, declined sharply after 1960 when local importers obtained a Comorian court order for the oil-mill and soap factory operated by Societe Bambao in Anjouan to be closed down on the ground that local production did not meet required hygienic standards. Copra-oil exports were finally discontinued in 1963. Exports of sisal, which was grown mainly in Anjouan, declined rapidly in the second half of the 1960s from a level of 1,400 metric tons in 1955 and ceased after 1971 because low world prices made production uneconomic. Finally, lava gravel (pouzzolane) was exported to Madagascar for cement production for a few years before and after 1970.

70. Recently Comorian exports have been based on four principal agricultural commodities - perfume essences, vanilla, cloves and copra - which together have accounted for 95 percent of total domestic exports. The remaining 5 percent has been made up by coffee, cocoa, coconuts, cinnamon, wood and wood products. In the last three years re-exports of petroleum products have grown in importance, amounting to about 6 percent of total exports in 1976.

71. Over the past five years approximately 37 percent of export earnings were derived from perfume essences. Among these, by far the most important is that of ylang-ylang, which is used as a stabilizer in the manufacture of perfume. Essences of jasmin, basil and palmarosa are also produced in small quantities. Comorian exports of ylang essence supply about 75 percent of total world demand, but because of the technical complexity of the perfume and toiletry industries, and the lack of Comorians with the relevant expertise, the country has been unable to take advantage of its quasi-monopoly position to obtain better prices. The market has to date been dominated by foreign buyers, who mix and grade ylang essence obtained from different sources and sell a standardized product to industrial users. In recent years a synthetic substitute has been developed which, although of inferior quality, might be used as an alternative by some manufacturers. 1/ Because of their high income elasticity of demand, perfume sales are very vulnerable to overall business conditions in industrialized countries. In the wake of the 1974/75 world economic recession, perfume production was curtailed to a point when in 1975 Comoros had to destroy a large part of the crop in order to maintain prices. Despite these factors, which tend to undermine the bargaining position of ylang essence exporters, raw material costs represent only a small part of the total costs of perfumeries and there is scope for Comoros to collaborate with the sole other important producer, Madagascar, in improving export prices.

1/ Particularly in the manufacture of toilet requisites where relatively low quality perfumes are used.

72. Comoros is second only to Madagascar as the world's main source of natural vanilla; in 1976 vanilla was only slightly less important than ylang essence as a source of foreign exchange. However, as in the case of ylang, their prominent position in the world market has not given Comoros and Madagascar any leverage on price levels. Natural vanilla encounters strong competition from a synthetic substitute especially in the market of the principal importer, the United States. The exporters' position has been particularly weak for two reasons. First, the importation of natural vanilla into the United States is mainly in the hands of the manufacturers of the synthetic product. Second, the largest exporter, Madagascar, used to hold stocks roughly equivalent to one year's world consumption. Both the price and amount of natural vanilla exported are effectively determined by the United States buyers, who limit imports to the equivalent of about one tenth of total vanilla essence retail sales. The export price rose by 11 percent in both 1975 and 1976 1/ after a prolonged period of virtual stability in nominal terms and now stands at about the same level as in the early 1950s. The strong fluctuations in the volume of Comoros' exports of vanilla, however, primarily reflect production problems. In particular, the large fall in sales in 1973, when only 34 metric tons were shipped abroad against 207 metric tons the previous year, may be ascribed to an extraordinary situation which has been subsequently corrected. 2/

73. Although cloves grow naturally in the Comoros, their commercial exploitation was only undertaken in relatively recent times, mainly on the initiative of the Societe Bambao on Anjouan and Grande Comore. Production has expanded rapidly since 1970, such that by 1976 cloves had replaced ylang essence as the largest earner of foreign exchange. The productive capacity of clove trees is however irregular, with yields varying in the proportions one to 6 in a vegetational cycle extending over a 4-year span. The export price rose 43 percent between 1973 and 1975, but fell sharply in 1976 to a level little higher than in 1970.

74. The quantity of copra exported expanded gradually during the 1950s and 1960s. From 2,400 metric tons in 1955, when coconut production was returning to normal after the devastating cyclone of 1950, copra exports rose at a peak of almost 5,300 metric tons in 1969. Since then and until 1974, production has varied between 2,400 and 4,900 tons per annum, contributing in average about 14 percent of export earnings. While the export price of copra remained relatively stable before 1974, in that year it increased 135 percent, which was translated into an equivalent increase in producer prices. When the export price fell 38 percent in the following year, traders' margins were squeezed and, in retaliation, they sharply reduced their purchases. As a consequence, only 1,300 metric tons were exported in 1975. The producer price was eventually adjusted downwards and in 1976, notwithstanding a further reduction of 25 percent in the export price, the volume of copra exports increased by 77 percent over that of the previous year.

1/ 1976 export prices are based on the January-August period.

2/ There was a major outbreak of theft of vanilla pods which resulted in many pods being picked prematurely. Also, part of the 1973 production was exported in 1974.

75. Other export items are all of minor importance. There would be, however, some scope for increasing sales of cocoa and coffee if the high losses caused by rodents could be prevented. Export of wood took place for the first time in 1976, but the potential for forestry exploitation is extremely limited. Possible new export items might include fish, salt and above all, copra-oil if, on detailed analysis, the establishment of an oil-mill proves justified. Exports might also be boosted by the creation of small export-oriented industries and by developing the existing handicrafts potential. 1/ With the possible exception of copra-oil, however, significant expansion of exports, at least in the medium-term, depends on increased production of the present export items, particularly of copra and cloves. While the likely demand, and therefore price levels, for perfume essences and vanilla is uncertain, the latest long-term forecasts for vegetal fats and oils predict stable prices in real terms. The long-term export prospects for cloves are uncertain; the main world importer, Indonesia, has plans to expand domestic production but it is difficult to evaluate their likely impact on Indonesia's demand for clove imports.

76. The price volatility of Comoros's main exports has led the Government to set up various stabilization funds. A fund for vanilla was created in 1964, and for ylang essence in 1974. Provision has also been made for copra, but it has not yet become operational. These funds have had a very limited role. The small reserves that have been built up through a levy on exports have been held with the Treasury. At present the export of Comoros' key cash crops is in the hands of a small number of traders both expatriate and Comorian, whose activities are scarcely supervised by the Government. Competition from a central buying organization would help to ensure that producers receive an equitable price. With this concern in mind, the Government is planning to group all existing funds into a National Fund, 2/ covering vanilla, cloves, copra, ylang-ylang, and cinnamon. The Fund would also be used to stabilize the price of imports of petroleum products and rice. If the requisite expertise can be secured, the Fund could take on some of the functions of an export marketing organization and, as far as ylang essence and vanilla are concerned, work in close collaboration with Madagascar.

1/ See paras. 160-161.

2/ Caisse Nationale d'Intervention Commerciale.

Table 14: TRENDS IN PRINCIPAL EXPORT COMMODITIES
(in millions CFAF)

	<u>1970</u>	<u>1975</u>	<u>Percentage growth in real terms</u>	<u>Percentage of total export earnings 1975</u>
Total exports fob				
of which:	1,278	2,036	+ 10	100
- perfume essences	385	567	- 19	28
- vanilla	403	689	+ 47	34
- copra	198	93	+ 71	5
- cloves	223	586	+103	29
- coffee	23	14	- 41	1
- cinnamon	19	2	- 92	-

Source: Statistical Annex, Table 3.2.

Characteristics of Imports

77. The dominant feature of Comoros' imports is the high proportion of food and other consumer goods. Over the past two decades the former have hovered around 40 percent of total imports, while the proportion of the latter was only marginally lower. The low percentage of intermediate and capital goods imports reflects the embryonic level of industrial activity and the low level of investment in plant and machinery. The large food imports are due to Government's efforts in the agricultural sector having been directed in the past almost exclusively towards expanding export crops to the neglect of food crop production. Also in recent years the growing number of highly paid expatriates induced a strong demand for luxury consumer imports.

78. Rice is the biggest import item, amounting to over 20 percent of total imports by value during the last two decades. Although rice constituted only a minor part of the traditional diet, what was once a luxury item is now widely regarded as a necessity. In the 1960s, rice was mainly imported from Madagascar, but since then Madagascar has become a net importer of rice and the main sources in the past few years have been Pakistan, Thailand and Taiwan, and more recently the People's Republic of China. The large volume of rice imports (13,400 metric tons on average between 1968 and 1975) creates storage problems with high losses caused by rodents, particularly during the cyclone season when calls by ocean-going ships are infrequent. In comparison to the average volume of the three preceding years, rice imports fell by 27 percent in 1975 and remained roughly at the same pro-rata level during the first eight months of 1976, when the bulk of rice imports were received in the form of gifts from bilateral and multilateral aid agencies.

Table 15: TRENDS IN SELECTED IMPORTS
(in millions CFAF; cif)

	<u>1970</u>	<u>1975</u>	<u>Percentage growth in real terms</u>	<u>Percentage of total import outlays 1975</u>
Total imports				
of which:	2,373	4,975	35	100
- rice	455	738	-17	15
- wheat flour	39	92	- 7	2
- textiles & clothing	264	452	-14	9
- cement	73	250	94	5
- industrial vehicles	58	98	65	2

Source: Statistical Annex, Tables 3.4 and 3.12.

79. Until 1974, the Customs Department operated a bonded warehouse system (entrepot fictif) which allowed importers to delay payment of custom duties and other import dues as long as goods were not withdrawn. On occasion goods remained in bond for as long as two years. When this privilege was abolished in 1974, import statistics were inflated by adding all the goods then in bond to the actual imports in 1974. The mission estimated the amount of imports recorded in 1974, but actually disembarked in previous years, at about CFAF 400 millions. The adjusted import data, as estimated by the mission, is given in Table 16.

Table 16: IMPORTS ADJUSTED TO TAKE INTO ACCOUNT
THE BONDED WAREHOUSE
(in millions CFAF)

	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>
Imports (custom records)	2,835	2,932	3,369	6,203
Adjustment (entrepot fictif)	5	93	319	- 417
Adjusted imports	2,840	3,025	3,688	5,786

Source: Customs Department and mission estimates.

80. During the 1960s Comoros' terms of trade gradually deteriorated as import prices steadily increased while the prices paid for its main exports remained practically unchanged. After a short-lived recovery in 1970 and 1971, the terms of trade again deteriorated until 1975 when the price of imported rice fell sharply. A further drop in the price of rice in early

1976 resulted in a continued improvement but the index exaggerates this, owing to a drop in the quality of imported merchandise following the withdrawal of the French, which has not been entirely eliminated from the index.

Table 17: FOREIGN TRADE INDICES
1970 = 100

	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>Jan.-Aug. 1976</u>
Export volume	118	115	88	113	110	..
Export prices (CFAF)	105	103	98	149	145	137
Import prices (CFAF)	96	98	119	171	156	118
Exports as "capacity to import" (volume)	128	120	72	98	99	..
Terms of trade	110	105	82	87	93	117
Barter terms of trade for non-oil exporting LDC's <u>a/</u>	95	93	101	94	84	..

a/ Source: UN Monthly Bulletin of Statistics.
Source: Mission estimates.

Balance of Payments

81. Since it has no control over external movements of private funds, the IEC does not keep any record of factor and non-factor service payments nor of any private capital transactions. Because the Comoros belongs to the Franc Zone, funds may be moved freely between Comoros and France. It is likely that after independence the private sector transferred to France as much capital as possible. At the same time, the inflow of investment capital was halted. On the other hand, as mentioned earlier, after the tightening of BCC's lending policies in 1976, traders who had enjoyed substantial credit facilities from the BCC found themselves in a situation in which they had to finance imports mostly with their own funds held in France.

82. Changes from year to year in the net foreign assets of the banking system indicate that the overall basic balance of payments outcome has fluctuated widely in the past. These variations may be partly explained by the irregularity of shipping and its impact on the trade balance, and partly by the uneven flow of aid. No information is available, however, on the leads and lags of current trade payments.

83. Given the paucity of data on exchange transactions, only the most tentative estimates can be made of service payments, transfers and capital movements. These are summarized in Table 18. The improvements in the official holdings of foreign assets is matched by a decrease in private traders' holdings explained above. At the end of 1976, Comoros' net official reserves were estimated to be sufficient to cover some seven

months of imports. This relatively favorable situation was due to Arab financial assistance (which had been received and committed, but not yet spent) and food aid from both bilateral and multilateral agencies.

Table 18: SUMMARY OF BALANCE OF PAYMENTS ESTIMATES
(in billions CFAF)

	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^P
Exports (inc. NFS) <u>a/</u>	1.2	2.4	2.2	2.4
Imports (inc. NFS) <u>b/</u>	-4.4	-6.9	-6.0	-3.6
Balance of goods and non-factor services	-3.2	-4.5	-3.8	-1.1
Public capital inflow (net)	3.9	5.9	5.0	2.6
Other transactions (net)	<u>--</u>	<u>-2.5</u>	<u>-0.1</u>	<u>--</u>
Change in foreign assets (increase -)	-0.7	+1.1	-1.1	-1.5

a/ Exports of non-factor services estimated at 10 percent of commodity exports fob.

b/ Imports of non-factor services estimated at 20 percent of commodity imports cif.

P = provisional.

Source: Mission estimates.

4. PUBLIC FINANCE

Overview

84. At independence the Comoros inherited a structure of government services ill-adapted to its needs and resources once ties with the colonial power were cut. The Government is now in a precarious financial situation owing to the cessation of French aid. In 1974, the year immediately preceding independence, domestic revenues were sufficient to meet only two thirds of territorial budget expenditures. Furthermore, a wide range of essential services were financed directly by France. Total French aid in that year amounted to some CFAF 6 billion (US\$25 million) or approximately two and half times domestic revenue. Over half this aid went to meet the costs of French technical assistance and a significant part of the services funded were geared to meet the needs of the expatriate community. Nevertheless, without external budgetary aid many vital services could no longer be provided: for example, hospitals lacked doctors and essential medical supplies, the secondary schools were closed and the agricultural extension departments virtually ceased operations. The Government felt obliged to take on the Comorian staff previously paid directly by France, so swelling expenditure on wages and salaries as to consume all domestic revenue, leaving almost no funds for the purchase of the materials and supplies necessary to enable the staff to operate effectively.

85. In 1976 emergency supplies from multilateral and bilateral aid agencies, combined with a US\$10 million budgetary loan from the Special Arab Aid Fund for Africa, (SAAFA), provided temporary relief. However, the outlook for 1977 is bleak, since domestic revenues are certain to fall even lower than in 1976, stocks are running out and essential maintenance expenditure cannot be much longer postponed if vehicles and plant are to remain in service. The emergency financial aid made available in 1976 is exhausted and continued assistance on the same basis is not assured. As explained above 1/, the monetary authority is only able to provide the Government with advances limited to 15 percent of the domestic revenues collected in the previous year. In any event, recourse to central bank borrowing would not be a satisfactory solution even in the short run as it would be rapidly reflected in a drawdown of foreign exchange reserves.

86. To meet the cost of repatriating the Majunga refugees at the beginning of 1977, the Government imposed heavy new taxes. In April 1977, the Government commenced a major reorganization of the Administration 2/ by dismissing all its employees except those required to continue essential services. A minority will be re-engaged at greatly reduced salaries 3/ over the remainder of the year as the new structures are put in place. The objective is to reduce the Government's salary bill to half domestic revenues. The danger is that when this is achieved Comoros will have a very limited administrative capacity to plan and implement development projects. It is to be hoped that budgetary aid from external sources may be secured in the near future to permit the Government to mount an investment program large enough to ensure sustained and rapid growth.

1/ See para. 55.

2/ See paras. 25-31.

3/ See para. 52.

Table 19: SUMMARY OF FINANCIAL SITUATION
(in millions CFAF)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^P
Current domestic revenue	992	1,229	1,276	1,402	2,021	1,715	2,400
Current expenditure	1,195	1,445	1,571	1,752	2,398	2,474	3,400
Current deficit	203	216	296	350	377	759	1,000
Capital domestic revenue	61	83	185	163	257	96	-
Capital expenditure	266	300	435	629	1,063	603	1,500
Overall budget deficit	408	434	546	816	1,183	1,266	2,500
<u>Financed by</u>							
French aid	395	462	401	559	896	404	-
Other aid	-	-	-	-	-	-	2,500
Treasury resources	13	-28	144	257	287	862	-

P = Provisional (excludes Mayotte)

Source: Ministry of Finance (for details see Tables 5.1 and 5.3 of the Statistical Annex).

Structure of Public Operations

87. In the past the central government budget was divided into three parts: the recurrent budget, the annexed public works budget and the investment budget. In addition, import and excise duties on petroleum products were paid into a road fund which is used to meet part of the costs of road maintenance. The communes and municipalities used to receive 10 percent of the revenues from trade licensing and had limited powers to levy additional indirect taxes; however, the bulk of local government expenditure was funded directly by the Central Government. Under the new local government arrangements the Liwali of each bavou will have delegated control over most departmental expenditures relating to activities occurring within their jurisdictions and the moudirias will have new, but as yet undefined, powers to raise revenues directly from the residents. The accounts of the National Office of Commerce ^{1/} are also managed by the Treasury. The other main parastatal organization is Electricite des Comores; in addition, the State owns Air Comores, the Compagnie Maritime Comorienne, and the petroleum importing and marketing organization. The State has a majority shareholding in Comores Denrees, and is in the process of acquiring full ownership of CREDICOM and the Banque Commercial des Comores.

^{1/} See para. 184.

88. A number of moneys are deposited with the Treasury, the most important being the balances of the various commodity stabilization funds, of the pension and social security funds and of the road fund. The Treasury also holds the funds which arise from its banking activities. 1/ Apart from small amounts of cash held by the Treasury, the financial balances of the Government have been held with the IEC, with the exception of the proceeds of the SAAFA loan, which were deposited with CREDICOM. In both cases the interest paid depended on the ruling interest rate offered by the French Treasury to official depositors.

The Fiscal System and Recent Revenue Trends 2/

89. The major source of revenue is indirect taxes, the principal ones being duties on imports. In 1975, 70 percent of domestic revenue was collected by the Customs Department, while direct taxes contributed only 15 percent. This is hardly surprising as there are few business enterprises of any size to tax and only a small proportion of the population is in salaried employment. In the period 1970 to 1975, both direct and indirect taxes grew at approximately the same rate (13 percent pa), some 2 percent slower than GDP. Both peaked in 1974, though the high level of collection of custom duties in that year is partly attributable to a change in policy concerning goods held in the bonded warehouse. 3/ Also, during 1974, the tendency of importers to build up stocks had the side effect of boosting government revenue. The opposite occurred in 1975, when traders started to destock. Account must also be taken of the fact that after July 1975 no revenue was received from Mayotte.

90. Comoros levies an array of different taxes and duties on external trade which in recent years have amounted to between 11 and 13 percent of the value of exports and between 17 and 20 percent of the value of imports. The bulk of export duties are derived from vanilla and perfume essences which are taxed at 14 percent and 10 percent, respectively. More generally export duties vary from 4 to 14 percent ad valorem and there is in addition a transactions tax of 1.2 percent. All imports also are subject to a 5 to 5.5 percent transactions tax. In addition a consumption tax of varying between 5 and 15 percent is levied on such imports as soap, salt, sugar, alcohol and tobacco which might possibly be produced locally. The rates of import duties and taxes taken together range between 15 and 65 percent, except in the case of tobacco and alcohol which are subject to a 200 percent duty. Capital goods are generally exempt from import duties, exemptions being granted by a Technical Investment Committee of the Ministry of Finance.

1/ See para. 59.

2/ The fiscal regime described in this Section relates to the situation pertaining up to the end of 1976.

3/ See para. 79.

**Table 20: CENTRAL GOVERNMENT CURRENT REVENUE a/ 1970-75
(in millions CFAF)**

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976^P</u>
Income tax	138	185	175	227	323	255	218
Import and export taxes and duties	639	765	769	803	1,292	1,194	875
Other indirect taxes	57	63	87	83	84	94	27
Property revenue	18	15	16	15	42	19	11
Earnings of government departments	132	168	191	265	211	112	112
Other revenue	<u>9</u>	<u>34</u>	<u>38</u>	<u>49</u>	<u>69</u>	<u>41</u>	<u>728 b/</u>
Total	992	1,229	1,276	1,402	2,021	1,715	1,971

P = Provisional.

a/ The figures do not include Mayotte after July 3, 1975.

b/ Includes some CFAF 500 million of exceptional revenue derived from the sale of food aid.

Source: Ministry of Finance.

91. Company profits are taxed at the rate of 30 percent with reasonable allowances being made for capital amortization 1/. An additional 5 percent tax is levied on undistributed profits. To stimulate investment the tax payable is reduced by 2.5 percent if the enterprise has invested a minimum of CFAF 5 million during the fiscal year. A 5 percent turnover tax 2/ was introduced in 1974, but was immediately discarded without any collections being made, following strong protests from those most affected; it was reintroduced at the beginning of 1977. Personal income tax is paid by individuals earning over CFAF 100,000 per year; the rate is progressive, reaching a maximum of 30 percent for those with annual incomes over CFAF 2 million.

92. Following the practice in most former French territories in calculating taxable income, relatively generous deductions (CFAF 10,000) are

1/ Impots sur les benefices divers.

2/ Taxe sur les chiffres d'affaires.

allowed for each child. The existing machinery for tax collection appears to be reasonably efficient although recovery is difficult because most tax payers have no understanding of the law and there are few means of publicity. Assessed taxes which remain uncollected amount to about 20 percent of the total, while tax evasion is estimated at about 25 percent of assessment.

93. The system of land taxation is designed to encourage owners to bring their land into productive use. All holdings over 5 ha which are forested or under cultivation are subject to an annual tax of CFAF 200 per ha. However, if the land is cultivable, but not under crops, the tax is set at CFAF 1,000 per ha. In a community where land is at a premium and where important tracts are in the hands of a few people or companies, this is an excellent measure to discourage owners from allowing good land to lie idle.

The Pattern of Government Expenditure

94. During the period 1970 to 1975 current government expenditure grew by 15 percent, or 3 percent faster than the growth in domestic revenues. However, expenditure figures derived from the territorial budget accounts are misleading, since increasingly over this period the financing of many important services was assured directly by France through its metropolitan budget; the degree of dependence on France may be seen from the fact that by 1975 France was meeting three quarters of total expenditure, excluding extra-budgetary investments financed by FIDES and the EDF. If account is taken of the latter, domestic revenues covered only 21 percent of the total recurrent and capital expenditure in 1975.

Table 21: GOVERNMENT EXPENDITURE 1970-1976 /a
(in millions CFAF)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976^P</u>
Territorial budget expenditure	1,460	1,745	2,007	2,381	3,461	3,077	4,962
Expenditure met directly by France	1,506	1,758	2,477	3,336	4,058	4,385	-
Total expenditure	2,966	3,503	4,484	6,717	7,519	7,462	4,962
Domestic revenue as a percentage of total expenditure	35	37	33	23	30	24	40

P = Provisional.

/a Excludes expenditure met directly by other aid agencies.

Source: Ministry of Finance (Moroni) and the Ministry of Overseas Departments and Territories (Paris). See Tables 5.3 and 5.4 in the Statistical Annex.

95. Expenditure on goods and services reached 58 percent of current expenditure in 1974, falling in 1975 to 46 percent. The absolute fall in the salary bill in the latter year was achieved by ceasing to recruit new staff after independence and by reducing the employment of daily paid labor; also, towards the end of the year there were delays in the payment of salaries. Expenditure on transfers increased in 1975; these were mainly advances made to the parastatal sector, which were mostly to be repaid in 1976.

Table 22: CURRENT GOVERNMENT EXPENDITURE
(in millions CFAF)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Wages and salaries	664	790	810	1,008	1,397	1,141
Goods and other services	415	471	562	584	739	782
Transfers and subsidies	84	155	172	147	198	489
Public debt	<u>32</u>	<u>29</u>	<u>27</u>	<u>13</u>	<u>64</u>	<u>62</u>
Total	1,195	1,445	1,571	1,752	2,398	2,474

Source: Ministry of Finance (see Table 5.2 in the Statistical Annex).

Table 23: PERCENTAGE DISTRIBUTION OF CURRENT GOVERNMENT
EXPENDITURE BY SECTOR, 1970 AND 1975

	<u>1970</u>	<u>1975</u>	<u>Annual Percentage Growth 1970-1975</u>
Agriculture	4	3	7
Education	17	20	20
Health	16	10	5
Public Works	13	14	18
Administrative and other services	45	37	11
Public debt service	3	2	14
Unallocated	<u>3</u>	<u>13</u>	<u>58</u>
Total	100	100	15

Source: Ministry of Finance (see Table 5.2 in the Statistical Annex).

96. The priorities attached to different sectors by the Government in the past is indicated by the sectoral distribution of current government expenditure and the related growth rates. The largest share of expenditure is devoted to administrative and other services, but in recent years this share has declined. This trend may have been reversed in 1976 with the expansion of the country's security forces after the departure of the French. Education expenditures have shown the fastest rate of growth, absorbing 29 percent of recurrent government revenue in 1975.

Public Investment 1970-1975

97. Capital expenditure financed by the territorial budget has been relatively modest, consisting mainly of buildings, other minor public works and contributions to the capital of enterprises in the parastatal sector. Most public investment has been financed directly by external agencies, mainly Fonds d'Investissement pour le Developpement Economique (FIDES), Caisse Centrale pour la Cooperation Economique (CCCE), Caisse d'Aide a l'Equipement des Collectivites Locales (CAECL) and the European Development Fund (EDF). In the period 1970 to 1975 the amounts disbursed were:

	<u>In Millions CFAF</u>
FIDES	2,854
CCCE/CAECL	220
EDF	<u>1,335</u>
Total	<u>4,409</u>

The distribution between sectors for the period 1970-74 was as follows:

	<u>Percentage</u>
Agriculture	23
Roads	35
Ports	2
Power	3
Airfields	5
Health	7
Education	11
Other	<u>14</u>
Total	100

98. The largest share of investment went into the infrastructure sector. Nonetheless at independence Comoros lacked a primary network of tarred roads, and many villages were linked to the main centers by mere tracks, traversable with difficulty by four-wheel drive vehicles. Furthermore, the islands have no ports capable of handling oceangoing vessels satisfactorily. The only infrastructure subsector which is well

developed in relation to needs is the airports. Although a substantial part of investment was directed to agricultural development, that sector too remains undeveloped. In short the level of public investment, which has averaged nearly CFAF one billion per annum in recent years, has not been sufficient to provide the Comoros with a basis for sustained development.

The Budgetary Situation in 1976 and Outlook for 1977

99. The Government started 1976 with about CFAF 700 million of accounts unpaid. Furthermore, the sudden departure of the French at the end of 1975 resulted in the transfer to the Comorian State of financial responsibility for a variety of services previously provided directly by France, including civil aviation, telecommunications, the Treasury, the radio and various health services, with a recurrent cost in all of approximately CFAF 2 billion ¹/₁. The estimated cost of taking over the Comorian personnel amounted to CFAF 267 million, even though salaries were reduced from the higher levels paid by France to those normal in the Comorian civil service. In fact, it was several months before the bulk of this staff could be absorbed onto the Government's payroll, and in the early months of 1976 salaries were not paid regularly even to the established civil servants, although full back payments were later made.

100. In response to an appeal by the United Nations' Secretariat, a number of aid agencies made available medical and food supplies. In particular, the Government reports that the World Food Program supplied 1,600 tons of flour and 2,500 tons of rice and Kuwait, 8,000 tons of rice, 1,500 tons of sugar, 200 tons of flour and 150 tons of salt. The proceeds of the sale of food aid provided about CFAF 500 million in revenue, which was earmarked for the investment budget. More important still was a US\$10 million concessionary loan from the Special Arab Aid Fund for Africa (SAAFA), which is administered by the Arab Bank for Economic Development in Africa (BADEA). The Kuwait Fund, with a loan of CFAF 1.3 billion, enabled a major road project, abandoned by France, to be continued. In addition the Kuwait Fund agreed to finance a project for the construction of fishing boats.

101. With the advent of independence, a number of new expenditures have inevitably arisen. First, there is the cost of foreign representation and travel; the Comoros Government has been very active in seeking foreign recognition and external aid. Second, the Government has established an army of some 800 men. Third, the Government has taken over and expanded the radio services in an attempt to improve the Government's internal information services. Furthermore, to make up for the loss of FIDES assistance, the Government has financed directly a much larger investment budget than in previous years.

¹/ This estimate was made by the Comorian Government; however, the French authorities report that expenditure on services in the Comoros financed on the metropolitan budget amounted to CFAF 4,385 million in 1975.

102. Taking all the above factors into account, total budget expenditure is provisionally estimated at about CFAF 4.96 billion (disregarding intra-budgetary transfers), of which CFAF 3.6 billion was spent on the ordinary budget and CFAF 1.4 billion on the investment budget. Of the latter about CFAF 400 million represents advances to parastatal organizations. Included in the ordinary budget expenditure is some CFAF 500 million in down payments for the purchase of material and equipment which will only arrive in 1977; these payments have been demanded by suppliers before accepting orders. Domestic revenue is estimated at CFAF 1.97 billion, and CFAF 546 million of exceptional revenue from the sale of food aid, leaving a balance of CFAF 3.0 billion to be financed mainly with the SAAFA loan. These estimates imply that the Treasury's resources were virtually exhausted by the end of 1976. This can be seen from the summary of the financial situation of the Treasury at the beginning of December, which shows that the gross assets of the Government amounted to only CFAF 1.1 billion, three quarters of which were either funds held in trust or sums already committed on accounts outstanding.

Table 24: FINANCIAL POSITION OF THE TREASURY
(as of December 3, 1976 in millions CFAF)

<u>Assets</u>		<u>Liabilities</u>	
Deposits with IEC	473.5	Individual accounts	119.5
Deposits with CREDICOM	600.0	Public authorities	32.0
Cash held	28.5	Stabilization funds	60.0
		Comores-Denrees	217.9
		Pension fund	53.0
		Social security fund	0.3
		Other deposits	20.4
		Accounts outstanding	302.6
		Balance	<u>244.3</u>
Total	<u>1,102.0</u>	Total	<u>1,102.0</u>

Source: Ministry of Finance.

103. The outlook for 1977 is bleak. Revenue from company taxation will reflect the sharp decline in business activity in 1976, and there will be a similar decline in personal income tax collections. Customs revenue will also be seriously affected by the drop in imports. This will be partly compensated for by exceptional measures adopted in early 1977, with the object

of raising special revenue to meet this cost of the repatriation of refugees. These included a 50 percent tax on all salaries above CFAF 10,000 per month, a 50 percent tax on all rental income above CFAF 20,000 per house per month, a 5 percent insurance tax on all businesses and a customs surcharge of CFAF 5 per kg on the importation of rice, flour and sugar. Direct tax revenue is now estimated at CFAF 400 million, indirect tax revenue is unlikely to exceed CFAF 800 million, down 11 percent from 1976. Non-tax revenue is estimated at CFAF 100 million, excluding the proceeds of the sale of food aid, and the repayment of loans and advances. Thus, recurrent domestic revenue which may be expected in 1977 is not likely to exceed CFAF 1.2 billion despite the exceptional measures. From April onwards only customs revenues have been collected and it is urgent that the Government reestablish as soon as possible its revenue department.

104. Given the economic recession in the islands, very little scope exists for increasing tax revenue. Indirect tax rates are already high; those items imported in quantity are bought by the masses who are already near subsistence level and cannot be reasonably expected to bear a greater burden, while higher rates on luxury items would, once again, produce very little revenue. The only solution to the budgetary crisis is either to obtain external budgetary support, as was the case in 1976, or to cut government expenditure drastically by reducing both the size of the civil service and the salary levels. The Government appears to have embarked on the latter course; in the absence of external support it had little alternative.

105. The shortage of funds has serious implications for the Government's plans to expand certain services. The Fundamental Reform 1/ could be largely achieved by a reallocation of staff to the wilayas and moudirias. But the creation of rural secondary schools, the running of commercial deep freezers in the villages, the provision of electricity supplies for the moudiria and similar services will all add to budgetary expenditure. Corresponding savings must be found unless external aid is obtained to meet such costs, although dependence on aid for recurrent expenditure for an extended period would be a questionable policy. Hopefully, sufficient budgetary aid will be forthcoming to enable the Government to phase the reorganization of its services over a realistic period. At the beginning of July, 1977 the Treasury's liabilities exceeded its assets by CFAF 320 million; in addition accounts outstanding to suppliers amounted to a further CFAF 149 million. The tax civil servants still working had not been paid for two months. The only external budgetary aid received during the first six months of 1977 was US\$1 million from Libya.

1/ La Reforme Fondamentale (see paras. 25-31).

PART C: THE SECTORS: CHARACTERISTICS AND ISSUES

1. THE RURAL SECTOR

106. Over 80 percent of the population obtain their livelihood from agriculture and practically all Comoros' export earnings are derived from the sale of agricultural products. Despite the primary role of agriculture in the Comorian economy, the country is at present unable to feed its population, and the food deficit has grown steadily in recent years. Productivity is particularly low in the case of food crops, which have been relatively neglected by the Government's extension service, but productivity is also unsatisfactory in the case of export crops. Livestock production, too, is highly inefficient. Poor farming methods, combined with heavy population pressure and uncontrolled deforestation has caused serious soil erosion. Below the main features of the agricultural sector are outlined, recent production trends reviewed and the main issues to be confronted in expanding agricultural production discussed.

Level and Trends in Agricultural Production

107. No census of agricultural production has ever been undertaken. Nonetheless, since the main cash crops are exclusively exported, production trends can be obtained from export trade data. Owing to stocking and marketing delays these data do not correspond exactly to annual production figures, but, as the main agricultural products exported all tend to deteriorate if stored for an extended period, the amount of stocking is limited and does not distort the long-term trend.

Table 25: VOLUME INDICES FOR PRINCIPAL AGRICULTURAL PRODUCTS, 1952-75 (Average 1952-56 - 100)

	<u>Average</u> <u>1957-61</u>	<u>Average</u> <u>1962-66</u>	<u>Average</u> <u>1967-71</u>	<u>Average</u> <u>1972-75</u>
Ylang Essence	125	192	279	352
Copra	123	145	194	130
Cloves	156	364	511	876
Vanilla	114	232	267	282
Coffee	139	189	221	223
Cocoa	100	110	108	78
Sisal	80	68	21	-

Source: Department of Customs, Moroni.

108. Over the period 1970-75 the relative importance of vanilla and cloves grew, whilst that of ylang essence and copra declined. During the past two decades the volume of agricultural exports 1/ has approximately tripled, with the largest increases being registered by cloves and ylang essence. Sisal, which provided over a fifth of export earnings in 1951, was no longer grown after 1971, while cinnamon has become an increasingly important, though still minor, crop on Mayotte. This pattern of change, with one crop gaining in prominence while another declines, has been repeated over the decades.2/

109. The trends in the export of the main agricultural commodities has been discussed above.3/ Production of these key crops declined from a peak in 1971 to a trough in 1973, but has recovered somewhat since, partly as a result of the rapid growth of clove production. Vanilla producers had a particularly poor year in 1973. It should be noted that 1975 was an exceptional year for two reasons. First, the Government was forced to destroy a part of the ylang-ylang crop, so actual production was much higher than is indicated by the export figure. Second, a sharp fall in copra prices resulted in a precipitous drop in copra production.

1/ Quantity index weighted by volume using 1952/56 prices.

2/ See paras. 69-71.

3/ See paras. 72-76.

Table 26: EXPORTS OF PRINCIPAL AGRICULTURAL PRODUCTS, a/ 1970-1975

(in metric tons)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Ylang Essence	71	57	99	100	99	60
Copra	4,371	3,988	2,423	4,890	4,178	1,260
Cloves	277	373	203	121	249	562
Vanilla	144	207	207	34	160	211
Coffee	103	73	102	42	38	61
Cocoa	48	16	50	19	38	21

a/ By year of export.

Source: Department of Customs, Moroni.

110. Although the main export crops can be grown on all four islands, over the years a marked degree of specialization has occurred. Grande Comore may be characterized as the vanilla island, Anjouan produces mostly cloves and perfume essences, Mayotte is the main source of cinnamon and Moheli has concentrated on copra production. Export earnings per capita vary only marginally between islands, except for Moheli where the earnings are nearly three times the average for the archipelago.

Table 27: PRINCIPAL AGRICULTURAL EXPORTS
BY ISLAND, 1974
(in metric tons)

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Moheli</u>
Ylang essence	19	50	21	2
Vanilla	115	15	4	2
Cloves	17	235	-	2
Copra	1,128	392	878	1,576
Coffee	5	-	-	23
Cocoa	34	-	-	5
Cinnamon	7	-	95	-

Note: These data are not fully consistent with aggregate customs export figures, but the discrepancies are not serious.

Source: Ministry of Production.

Table 28: AVERAGE ANNUAL VALUE OF AGRICULTURAL EXPORTS BY ISLAND, 1973-74

	Total Value (in million CFAF)		Percentage 1973-74	Average export earnings per capita in CFAF
	1973	1974		
Grande Comore	551	680	38	4,000
Anjouan	380	749	35	5,000
Mayotte	213	307	16	6,000
Moheli	<u>132</u>	<u>214</u>	<u>11</u>	<u>14,500</u>
	1,276	1,950	100	5,000

Source: Bilan Agro-Economique, 1952-74 (R. Martin, Ministry of Rural Development, 1975).

111. Data on food production is scarce and unreliable. A survey undertaken in 1965 estimated total food crop production at CFAF 1.7 billion, the most important item being 30 million coconuts. The other principal crops were the following:

<u>Crop</u>	<u>Quantity in tons</u>
Bananas	23,000
Cassava and other roots	23,000
Rice	2,800
Peas (Ambrevades)	2,100
Maize	1,200
Other fruit	1,000
Other vegetables	1,000

112. Production is believed to have increased slowly since 1965, as is evidenced by the expansion of the area under cultivation. However, it is probable that owing to soil exhaustion, the repeated use of seed from the previous harvest and the failure to apply fertilizer, yields have declined; the needs of the expanding population have been met mainly by increasing imports, especially of rice and vegetables. Although no firm data on nutrition exists, there is evidence of widespread malnutrition, particularly due to deficiencies in animal protein, especially among those living in the interior who eat little if any fish.

113. In all there are some 40,000 cattle, 50,000 goats and 6,000 sheep, with over 50 percent of the livestock located on Grande Comore. Despite these

small numbers there are already 1.35 livestock units per ha of pasture, over twice the recommended stocking rate. The offtake from the small herds of livestock is low, and the average per capita consumption of meat has been estimated at no more than 5 kg per annum. The deficit is partly made up by meat imports previously from Madagascar, but now mainly from Tanzania.

Competition Between Different Land Uses

114. The system of land tenure and the proposed land reform were outlined earlier 1/. Consultants (IRAT) have recently completed detailed land capability surveys for all the islands; 2/ the results are summarized in Table 29. About half the land is considered suitable for agriculture, while the remainder should be mainly reserved as forest. Ten percent of the surface area of the archipelago is considered suitable for food crop cultivation without any special land preparation. The figure varies from 11.5 percent for Moheli to 8.5 percent for Mayotte and Anjouan. However, with terracing and other works, the area suitable for food crops could be expanded. Frequently, land suitable for food crops is used for tree crops, while food crops are grown on less favorable soil which would be better devoted to tree crops.

Table 29: LAND CAPABILITY BY TYPE

<u>Type of Land Use</u>	<u>Surface Area (ha)</u>	<u>Percentage</u>
Food crops	22,000	10
Tree crops	60,000	27
Pasture	22,000	10
Forest	93,000	42
Unsuitable for agriculture or forestry	<u>26,000</u>	<u>12</u>
	223,000	100

Source: Institut de Recherches Agronomiques Tropicales, Moroni.

115. In some areas of Anjouan slopes of over 30° are being cultivated without terracing, causing rapid erosion. Through mismanagement, wide

1/ See para. 6 and Statistical Annex, Table 7.1 and 7.2.

2/ See para. 122.

areas now under food crops are in urgent need of rehabilitation. On average there is only 0.4 ha of agricultural land of all types per inhabitant, though the variation between islands is considerable; in Moheli there are 1.6 ha per person, whereas in Grande Comore there is 0.3 ha and in Anjouan only about 0.2 ha. Mayotte, with 0.6 ha per person, lies in between these two extremes. The land actually available for food crops is much less. With traditional farming techniques an average family of 7 requires 3.6 ha to be able to feed itself, implying that in all 70,000 ha would be needed to feed the population of Anjouan alone, whereas there are only 42,000 ha of cultivable land on that island 1/. However, with reformed farming practices and suitable crops, as developed by IRAT (see below), 0.1 ha per person would be sufficient to satisfy the individual's nutritional needs. The shortage of cultivable land and its misallocation means that in certain critical regions, particularly in Anjouan, families using traditional farming methods do not have sufficient land even to eke out a subsistence livelihood. In such cases, the population must depend partly on income transfers from relatives working elsewhere.

Table 30: ACTUAL LAND USE BY ISLAND, 1965
(percentages)

	<u>Cultivated</u> <u>Land</u>	<u>Pasture</u>	<u>Forest</u>	<u>Land with no</u> <u>economic use</u>
Grande Comore	35	9	11	45
Anjouan	64	-	24	12
Mayotte	64	6	19	11
Moheli	59	7	21	14
Archipelago	48	7	16	29

116. Whilst in theory there is sufficient land to enable enough food to be grown to feed the population without reducing the areas devoted to cash crops, it is evident that in practice the two alternative uses are in fierce competition. Poor techniques employed result in very low yields and the peasant farmer has sought to compensate for this by expanding the area under food crops on to land with soils suitable only for tree crops or forest. The situation is aggravated by the fact that tree crop plantations have been established by the colonial companies on land more suited for food crops. In Anjouan in particular, as land pressure has developed, so have the landless increasingly moved onto estate land, sometimes uprooting productive trees and replacing them with food crops, often with a much lower return per ha. This process greatly accelerated after independence.

117. The Government's policy now is to promote the transfer of estate land to small farmers, but the farmers are encouraged to continue cultivating the tree crops. This in fact only happens if the farmer has already sufficient land to meet his subsistence needs. When the tree crops are

1/ Only 3,500 ha are suitable for cultivation without anti-erosion works.

retained, yields frequently improve because the farmer takes greater care of the trees than does a mere laborer paid piece rate. The yield of clove trees, in particular, depends greatly on careful cropping. The main land owner, Societe Bambao, has managed to sell a large part of its estates in Mayotte, Anjouan and Moheli, preferring to concentrate on the processing and export of the crops.^{1/} The company has special expertise in the distilling of ylang and other perfume essences.

118. The farmer depends on a deficient network of private traders for the marketing of his crop. Owing to poor roads and the dominant position of a small number of large traders who also provide credit, marketing arrangements are far from satisfactory. If the farmer could be reasonably sure to sell his crop at a fair price and at the same time be certain to be able to buy rice to meet his requirements, the advantages of concentrating on high return cash crops would become more evident. Thus, the improvement of marketing arrangements is one way to encourage farmers to specialize in crops most suited to their land. Also, better yields resulting from the introduction of improved techniques would reduce land pressure. This requires a major extension effort accompanied by measures making available the necessary inputs.

Agricultural Services

119. Until the administrative reform of 1977, the services of the Ministry of Production mainly related to agriculture, fisheries and forestry; practically nothing was being done to promote industrial development. Owing to the departure of French technicians at the end of 1975 and the acute shortage of funds for operational expenditure, most activities have come to a halt. The few agricultural field stations, consisting of simple buildings and demonstration plots, have mostly been requisitioned by the security forces. There are no fully trained professional staff; in all there are nine Comorians graded as agricultural officers ^{2/} (three trained in France, two in Madagascar and four in the USSR), and twelve "adjoints techniques". These are insufficient to run the five main services (agriculture, livestock, crop preparation, extension advice and forestry). Either the structure of agricultural services will need to be reorganized, or new expatriate staff recruited; both are needed. In any event, as a matter of urgency, the Government should obtain the assistance of an experienced agricultural economist to help formulate an agriculture sector plan and prepare agricultural projects for external financing.^{3/}

^{1/} The sale of estate land has become a controversial issue, owing to queries being raised as to the validity of Societe Bambao's ownership rights. Land has been sold for CFAF 25,000 per ha plus CFAF 500 to 1,000 per ylang tree and 30 percent administration taxes and fees.

^{2/} Ingenieur Agronome.

^{3/} Possibly as a member of the UNDP planning team (see para. 36).

120. In 1963 responsibility for managing the various agricultural projects financed by France was entrusted to a parastatal organization called Societe de Developpement Economique (SODEC) with technical assistance provided by the French state enterprise Bureau pour le Developpement de la Production Agricole (BDPA). This greatly reduced the role of the Ministry responsible for agriculture. Over the years SODEC was mismanaged and after a decade of failure was wound up in 1974. Responsibility for project implementation was transferred back to the relevant services in the Ministry of Production.

121. Comoros has no facilities for the training of subordinate agricultural staff. A small low level training institute at M'Vouni on Grande Comore was badly damaged during a period of civil unrest in 1975; it has since been repaired and converted into an establishment for training primary school teachers to teach agriculture. This is an innovative program designed by UNICEF in response to a government request for assistance in making agriculture a major component of the school program. As a result, with an expansion in school enrollments, young people should, in time, have a much better understanding of basic farming practices. It is intended that training should be highly practical and relevant to Comorian conditions. The training of subordinate agricultural staff is provided on-the-job, while all sub-professional and professional staff are sent abroad for training. Consideration needs to be given to re-establishing facilities in the Comoros to train junior field staff.

122. Since 1964, the Government has depended mainly on an independent French research organization, IRAT,^{1/} to undertake all agricultural research. IRAT is based on Grande Comore, but has also run field trials and demonstrations on Anjouan and Mayotte. Its research ^{2/} has been focused primarily on seeking ways to improve food crop production. This research has had two main thrusts. First, IRAT embarked on the preparation of detailed soil, land capability and land use maps. These have now been completed for Anjouan and comprehensive practical proposals have been prepared for modifying actual land use, which could serve as basis for planning an integrated rural development program.^{3/} Data have been collected for similar studies for the other islands, but funds have not been made available to complete the work. Second, field trials have been carried out to determine the optimum cultivation systems and cropping patterns for different soils, topography and microclimates, and to develop crop varieties best suited to Comorian conditions. An important part of this work has been experimenting with different soil erosion control techniques. A

^{1/} Institut de Recherches Agronomiques Tropicales et des Cultures Vivrieres.

^{2/} See Agricultural Research in the Comoros: Primary Factor for Socio-Economic Development by D. Pouzet (1976).

^{3/} See Anjouan - Synthesis of IRAT's Activities in the Comoros, 1966-75 by G. Subreville.

major shortcoming of IRAT's work has been the absence of effective links between research and Government's extension services, mainly due to the weakness of the latter. Also there have been no economic studies of alternative farming systems. Regrettably no information specific to the Comoros is available on the relative returns to labor which may be obtained from different crops nor on the respective labor requirements throughout the year, although the results of research in other developing countries can be used to derive approximate data.

123. IRAT's contract, which had been financed by the French Government until independence, was not renewed until early 1977. IRAT's main research center south of Moroni was occupied by the Army and by the end of 1976, IRAT's activities were being wound up. The cost of operations in 1976 was borne by IRAT itself, a situation which could not continue.

124. IRAT has experience and documentation relating to Comorian agriculture which is virtually irreplaceable. The new arrangements are intended to ensure that its activities will be much more closely integrated with Government's agricultural services. At present, Comoros lacks the resources, both financial and technical, to establish its own research organization, but in the long-term the objective must be to create a permanent Comorian institution which could be a base for and could control external research consultants. In the short-term, however, by employing IRAT, Comoros should be able to benefit from its many valuable links to other French tropical research organizations.

Table 31: SOME DATA ON YIELDS OF TRADITIONAL AND IMPROVED CROP VARIETIES
(in 100 kg per ha)

<u>Crop</u>	<u>Improved IRAT variety and farming technicians</u>	<u>Traditional variety and farming techniques</u>
Mountain rice	20 to 25	2 to 6
Maize	80 to 100	5 to 12
Cassava	200 to 250	130
Sweet potato	150 to 200	15 to 30
Ambrevade	10 to 17	3 to 5

Source: IRAT, Moroni.

Problems and Prospects for the Principal Crops

125. Comorian cash crops are produced by both estate companies and small farmers. Generally, productivity is low and crops tend to be neglected. As elsewhere in Africa, the youth prefer to seek work in the towns or even abroad as migrant workers, but opportunities are few. Yet, if he employs sound practices, a farmer can easily earn more than unskilled laborer with

less effort. Given Comoros' dependence on agricultural exports, it is remarkable how little effort is devoted to their production; the labor input amounts to less than 50 days per member of the active population in the agricultural sector.

(a) Ylang-Ylang

126. The ylang tree was introduced to the Comoros from Indonesia about 75 years ago. Its cultivation has been greatly expanded since 1950 and Comoros is now the world's principal producer of ylang essence. The other major producer is Madagascar; together they supply the bulk of the market, with only small quantities being produced in the Pacific islands.

127. The advantage of ylang is that it grows satisfactorily on poor land generally considered unsuitable for food crops. Nonetheless yields vary as a result of differences in soil fertility. Thus, although there are 0.6 million trees in Grande Comore compared to 0.5 million trees in Anjouan, Anjouan produces twice the quantity of essence, while Mayotte with only 0.26 million trees produces as much essence as Grande Comore.^{1/} The greatest problem confronting Comoros' ylang-ylang industry is the general deterioration in the quality of the essence owing to the primitive equipment and poor methods used by the growing number of small industries. One solution would be to establish one or two modern cooperatively run stills, especially in Grande Comore.

128. As already mentioned ^{2/} sales of ylang-ylang depend on the world demand for perfume, which in turn is highly sensitive to economic conditions in the developed countries. Because of Comoros' weak marketing position and the risk of synthetic substitution, there is little opportunity for significantly raising the export price through organized marketing. At this juncture Comoros could not attempt to establish its own cosmetics or perfumery industry owing to its technical and marketing complexity. Nonetheless, it would be advantageous for the Madagascar and Comoros Governments to cooperate closely in planning production and in supervising the quantities and quality marketed as countervailing measure in the face of highly organized and well-informed buyers. A reasonable arrangement would be to agree to maintain the same market shares and to assume that over the long-term demand will grow at about the same rate as the more developed countries, currently projected at about 4 percent for the next decade. On this assumption Comoros would plan to produce 110 tons of essence in 1980 and 175 tons in 1990.^{3/} Given the shortage of land for food crops, plans should be made to transfer any ylang plantations which are now on good soil to land unsuitable for food crops.

(b) Vanilla

129. Vanilla is Comoros' second most important cash crop. First introduced to Mayotte from Nossi-be in 1873, its cultivation has spread to all four islands. It has become a particularly important crop in Grande

^{1/} For ylang production data see Table 7.4, Statistical Appendix.

^{2/} See para. 71.

^{3/} For discussion of marketing possibilities see para. 71.

Comore, providing over half the island's export earnings. 85 percent of Comoros' vanilla exports are grown on Grande Comore. In all there are about 14 million vanilla vines occupying 4,192 ha distributed between the islands as follows:

	<u>Vanilla Vines</u> (in millions)	<u>ha</u>
Grande Comore	11.5	3,500
Anjouan	1.5	480
Mayotte	0.5	152
Moheli	0.2	60

130. Vanilla production expanded rapidly in the sixties in response to a special extension program production, which included the subsidized distribution of new vines. Since 1970, production has stagnated; indeed in 1973 and 1974 production fell far below the peak level of 207 tons reached in 1969, but recovered again thereafter. Also, poor cultivation practices result in extremely low yields; on average the Comorian farmer produces only 50 grams per vine compared to 10 to 20 times that amount realized by certain Malagasy farmers. A particular problem recently has been a fungus disease (*Fusarium* species) which has caused widespread damage. It is caused by poor cultivation practices, especially failure to weed.

131. The vanilla vines are grown mostly intermingled with food crops (maize, cassava, rice, etc.) under the shade of coconut and other trees. The season starts in September with planting and weeding; when the flowers appear they must be pollinated by hand. The pods are picked between July and September, dried and prepared for export. From start to finish the crop is highly labor-intensive. The crop is cultivated almost entirely by small farmers. In 1976 the marketing of vanilla was simplified by eliminating intermediaries; the processors ("preparateurs") - some 50 in all - were forced to employ agents directly, which has resulted in an improvement in producer prices. The export of vanilla is in the hands of a small number of large processors who also buy from the small processors.^{1/}

132. The producer price has been controlled since the Vanilla Stabilization Fund was established in 1964. During the sixties this price fluctuated between CFAF 150 and CFAF 250 per kg, rising to CFAF 300 in 1970 and CFAF 450 in 1976. Yet in real terms, compared to the price index for imports, the export price has fallen about 25 percent between 1970 and 1975. If a larger period is considered, the decline has been marked even in nominal terms; at the end of 1976 the export price stood at about US\$15 per kg compared to US\$20 in 1960.

^{1/} For details of the marketing arrangements see para. 72.

133. Vanilla production could be greatly expanded by the adoption of improved but simple techniques. Most important of all, the farmer needs to be persuaded to take greater care of his vines, providing the right type of support and shade. The reintroduction of a scheme for the distribution of subsidized vines would also be justified. Unfortunately, the world market is narrow and demand is threatened by a cheap synthetic substitute. Nonetheless the demand for natural vanilla should continue to rise steadily in step with incomes in the industrialized countries, and a gradual expansion of vanilla production could be planned without too much risk.^{1/} This should be achieved not by an increase in the number of vines, but simply by better yields through improved cultivation practices and by systematically replacing old vines. Prospects for vanilla production brightened in April 1977, when the EEC agreed to include this product in the commodity-earnings aid scheme (Stabex). This scheme, which now covers 20 products, is designed to top up export earnings of small countries dependent on a few commodities when falling prices or natural disasters cause them to drop. In fact, although the US is the main customer for Comoros' natural vanilla, between 1972 and 1975 EEC countries accounted for almost 32 percent of the value of Comoros' vanilla exports.

(c) Coconut

134. The coconut is Comoros' principal crop; it is a source of food and drink, cooking oil, thatching material, wood and copra. Its cultivation presents no major problem. There are an estimated 3 million trees occupying some 20,000 ha, or one tenth of the total surface area of the archipelago. The distribution of trees between islands is as follows:

Island	Number of trees ^{2/} (in thousands)
Grande Comore	1,200
Anjouan	680
Mayotte	630
Moheli	540

^{1/} The risk would be greatly reduced if the producers' marketing organization ('Univanille') could find the means to bypass the American producers of synthetic vanilla, who at present control vanilla imports. In fact a shortage of natural vanilla in 1977 has driven prices up sharply.

^{2/} Taken from the Delome Raport, IRHO (1972) adjusted to take into account the findings of the pilot rat eradication program.

135. The coconut tree grows along the coast and inland up to maximum altitude of 500 m. Yields decrease sharply with increasing altitude; on average a tree has 30 nuts per year. On average, of the 90 million nuts produced annually, 35 million are consumed, 25 million are converted into copra for export and the remainder, equivalent to one third of the total crop, is destroyed by rodents. The flesh of the coconut is converted into copra by a drying process. Since sun drying is inefficient, some 80 ovens have been constructed. Half of these are on Moheli, where copra production is the major economic activity.

136. A major increase in copra production could be easily achieved by replanting with new higher yielding varieties and by eradicating the rats. A rat eradication campaign was mounted in Moheli in 1973, but was stopped prematurely for financial and administrative reasons before the whole island had been covered. Consequently, the island was rapidly reinfested. However, based on this experience, a comprehensive new project has been elaborated which would eliminate the rats on all the coconut plantations over a period of five years. The justification for such a project, costing some CFAF 650 million, would depend on whether the nuts thus saved would be collected and converted into copra or coconut oil. This in turn would depend on future price trends. It is currently projected that the price of copra (fob Comoros) would reach CFAF 90 (in 1976 CFAF) in 1980 and would improve gradually thereafter. Such price levels are considered more than adequate to both interest the producer and justify the project, but steps need to be taken to achieve greater price stabilization.^{1/} The possibility of establishing a mill to convert coconuts directly into oil deserves further investigation.^{2/}

(d) Cloves

137. The importance of cloves in the Comorian economy has grown rapidly in recent years. In the mid-fifties less than 2 percent of export earnings were derived from cloves; by 1975 this figure had climbed to 30 percent and was even higher in 1976. The oldest plantations were established by the Societe Bambao in the 1930s and by 1973 there were some 140,000 established trees, 100,000 of which were on Anjouan and 30,000 on Moheli. No trees are found on Mayotte where the drier climate discourages their cultivation. Plantations have a density of approximately 150 trees per ha, so that overall about 900 ha are under cloves.

138. Harvesting takes place between July and November, and great care must be taken not to break branches. Damage is best avoided by using ladders, but unfortunately few farmers have ladders and the pickers generally climb the trees instead. Yields vary widely according to the region, the season and the condition of the tree. In an exceptional year up to 5 kg may be obtained from a single tree, but the average is between one and 2 kg. Seasons also vary between islands; for example 1973 was an exceptional year for Anjouan, while the harvest was very poor on neighbouring Moheli.

^{1/} See paras. 75-76.

^{2/} See para. 166.

139. Of all Comoros' cash crops, cloves has the best prospects. Between 1971 and 1975, the Government made a major effort to expand clove production through the distribution of over one million seedlings, 30 to 40 percent of which should survive to come into production by 1980, provided the plantations are properly cared for. The Government plans to distribute another 800,000 seedlings over the next four years. On the basis of trees already planted, it would be reasonable to project production as exceeding 1,000 tons by 1980, but exports might be limited by marketing problems.

140. Production was much encouraged by the tripling of the export price between 1968 and 1970, triggered by a failure of the Zanzibar crop. Fortunately, the Comoros clove has not been touched by the serious "die back" disease which afflicts cloves grown on Zanzibar. Since 1970 the price has improved little, and the future price depends greatly on two factors: first, the rate at which the main importer, Indonesia, develops its own production and, second, the success that the other two main export producers, Zanzibar and Madagascar, may have in promoting clove production.

(e) Other Cash Crops: Opportunities for Diversification

141. The other cash crops worthy of mention include coffee, cocoa, cinnamon, essential oils other than ylang-ylang, and sugar. The small quantities of coffee and cocoa grown are threatened by the destruction caused by rats. No action to promote these crops is worthwhile until the rats have been eradicated. Wild cinnamon is harvested on Mayotte and in recent years an attempt has been made to develop plantations. The plant is well suited to all the islands and its production could easily be expanded. Unfortunately the price is not sufficiently remunerative to justify any special effort to promote its production. On Anjouan there are small plantations of jasmin, basil and palmarosa, and it would be worthwhile investigating their potential for development. The same is true of ginger found mainly on Anjouan. At present little sugar is grown, but a detailed study has been completed for the establishment on Mayotte of a plantation and mill. ^{1/} The study concludes that such a project would be feasible. Sugar might also be grown on an industrial scale on Moheli. Lastly, there appears to be scope for mulberry cultivation with the objective of creating a silk industry. The advantage of the mulberry is that it grows above an altitude of 500 m and therefore does not compete with other tree crops.

The Need to Expand Food Production

142. Over the past decade the quantity of rice imported more than doubled. Comoros currently imports about 50 kg of rice per inhabitant, costing in 1974 (when the world rice price peaked) a sum equal to Comoros' total export earnings. Domestic rice production amounts to only 3,000 tons, or one fifth of the quantity imported. All the efforts so far made to promote rice production have been to no avail; average yields remain no higher than 400 kg per ha and one is forced to conclude that few areas are well suited

^{1/} See para. 167.

to rice cultivation. Furthermore, in a bid to increase production, farmers are expanding onto slopes far too steep to be cultivated, cutting away the forest cover and causing devastating soil erosion. The farmer's methods have changed little over the years, despite over 25 years of agricultural extension work. Indeed, the cultivation techniques have remained much the same for centuries. Tools, for example, are in such short supply that many farmers still employ a traditional stick hoe.

143. Rice, which must be imported, was once considered a luxury, but now is regarded as a basic necessity. The archipelago is capable of producing efficiently a wide variety of alternative food crops, including coconuts, bananas, cassava, sweet potatoes, yams, maize and a variety of fruits, legumes and other vegetables. Comoros is too poor to depend on imported rice, when alternative food can be locally produced. Strict control measures are required gradually to reduce rice imports and to habituate the population to an alternative diet, as steps are taken to reorientate the pattern of food crop cultivation. This policy would meet resistance, but its implementation is a matter of survival unless the country continues to depend on external food aid. Indeed, food aid could possibly be used to help change eating habits by creating a substantial price differential between rice and alternatives, such as maize, which are better adapted to Comorian agricultural conditions. 1/ The meat deficit should be tackled not only by improving cattle husbandry, but also by launching intensive production of poultry and small stock such as rabbits.

144. It is evident from past experience, both locally and elsewhere, that governmental measures will have little impact unless all the various constraints are tackled simultaneously in a coordinated manner. Both food and cash crop production is hindered by a gross shortage of even the simplest tools, by a lack of improved varieties of seeds and plants, by the disorganized marketing system, by the absence of credit for small farmers and by general ignorance of improved farming methods. The failure of BDPA's associate SODEC 2/ in the 1960s, particularly in respect of its activities in Anjouan, well illustrates this point.

Forestry: A Crisis Situation

145. The rapid rate of deforestation is well illustrated by data from two surveys of forestry resources, one undertaken in 1968 and the other in 1974. Between these two dates the area covered by forest declined by 44 percent. The corresponding figure for Anjouan was a catastrophic 69 percent, resulting in the partial destruction of the island's water catchment areas and greatly accelerated soil erosion as already mentioned above. 3/ Hesitant steps have been taken to plant new forests, but to date the area reforested covers less than 1,000 ha. Some of the reforested land has already been invaded by illicit woodcutters, against whom action is rarely taken. In all there now remain approximately 20,000 ha of forest, half of which is secondary growth.

1/ The European Development Fund has agreed to finance a pilot maize production program.

2/ See para. 120.

3/ See para. 115.

Table 32: FOREST AREAS, 1968 and 1974

	<u>1968</u> ---in hectares---	<u>1974</u>	<u>Percentage decline</u>
Grande Comore	16,000	12,600	21
Anjouan	8,000	2,500	69
Mayotte	15,000	5,500	63
Moheli	5,000	4,000	20
Archipelago	44,000	24,600	44

Source: Forestry Department, Moroni.

146. The 1974 survey estimated annual wood consumption to be 2.5 m³ per person, an exceptionally high figure, 1/ nine tenths of which is consumed as domestic firewood. Some 4,000 m³ of construction wood are obtained annually from the natural forest of the Khartala on Grande Comore, which was nationalized in 1976. This is the only significant industrial forestry operation. It has been calculated that Comoros' present domestic firewood needs could be met on a sustained basis from 33,000 ha of eucalyptus plantation, equivalent to 15 percent of the total surface area of the archipelago, whereas to obtain such a supply from the natural forest would require an area of forest seven times as large. This requirement grows annually at the about same rate as population, if not slightly faster.

147. In view of the situation described above, a major reforestation program should be undertaken as a matter of great urgency and existing forest areas should be vigorously protected. To meet the country's wood needs an FAO report 2/ has set out in detail a minimum program for the period 1975-2000, which in summary consists of the following:

1. the planting of between 250 and 300 ha of industrial forest annually, with emphasis initially on the reforestation of the La Grille area of Grande Comore;
2. the systematic exploitation of some 23,000 ha, now occupied only by aged coconut trees, by planting an undergrowth of cinnamon trees;

1/ E.g. approximately double the estimate for East Africa.

2/ Projet de Programme pour le Futur Developpement Forestier dans l'Archipel des Comores, by A. Deville (August, 1974).

3. an integrated agro-forestry scheme on those areas presently cultivated, but which have been classified by IRAT as suitable only for forest; and
4. a forestry-banana tree scheme to protect existing forest areas from further encroachment by cultivators.

148. Such a program appears to be too modest to meet Comoros' needs. After an initial pilot stage, a larger planting program should be envisaged. In any event the Forestry Service will need to be strengthened; it has now a staff of only three foresters and eleven assistant foresters. Considerable experimentation will be needed initially to evolve the most appropriate procedures for the different schemes. The cost of the program will be too great to be funded from domestic resources and will therefore require external finance.

Opportunities for Fisheries Development

149. The coastal waters surrounding the Comoros archipelago are not rich in fish. The continental shelf is narrow and, except within Mayotte's coral lagoon, the environment is not particularly favorable for fish. The fisheries potential is estimated to be 6,500 tons per annum, of which 3,500 tons from the Mayotte lagoon. Beyond the coastal areas ocean tuna is plentiful, but is already fished extensively by industrial fleets based mainly in Madagascar and East Africa. Within a radius of 50 km around the archipelago there is a tuna potential of approximately 20,000 tons, half of which may be considered accessible to small motorized fishing boats.

150. About 3,500 Comorians from some 140 coastal villages are engaged full time in fishing, using approximately 2,500 outrigger canoes. Each canoe carries between one and three men, and is made locally at a cost of CFAF 25,000-100,000. Only 3 percent are equipped with outboard motors; the remainder depend on sails or are rowed. Using either lines or nets, a canoe team catches an average 15 kg a day and makes 100 sorties a year. Fishermen with small motorized boats are able to catch three times as much. Due to the strong winds, fishing is possible for at most only 200 days per year. The price varies both seasonally and by location, from as little as CFAF 100 per kg in isolated fishing villages to as much as CFAF 500 per kg in Moroni in 1975, indicating considerable marketing problems. There are no reliable data on the earnings of fishermen, but their annual income is often less than the minimum wage, while the effort and risk required to earn that income is much greater. Thus, the fishermen are one of the poorest and least socially respected groups.

151. Recently, with FAO assistance, the Government has established a small fisheries service in the Ministry of Production. The expansion of fishing has been seen as the main means of reducing the animal protein deficiency in the diet. Currently annual consumption per capita amounts to about 10 kg, though most of the fish is eaten by the population on the coast and little reaches the inland villages. The quickest way to raise fish production would be through the introduction of industrial-size boats, but this would risk undercutting the small fishermen. Hence efforts have been mainly concentrated on devising simple ways of improving traditional fishing techniques and the marketing of their catch.

152. One method of improving traditional fishing is to use small motor-boats to tow up to five outrigger canoes to the fishing area. As a pilot project 15 such boats have been purchased, together with equipment for three refrigerated stores, one each for Grande Comore, Anjouan and Moheli. The boats are to be distributed to fishing cooperatives yet to be established. Lack of both trained boat operators and operating funds are two problems requiring an early solution. Given an adequate organization, it would be reasonable to envisage a larger project with sufficient motorboats to justify the cost of proper maintenance arrangements and administrative overheads. Such a project would give rise to the possibility of establishing a small boat construction industry. 1/ A second project would be to provide credit for the purchase of 100-200 outboard motorboats.

153. A critical problem to be confronted in mounting a major fisheries project is marketing. While it is true that a big increase in fish consumption would improve the population's diet, it is unlikely that those families with protein deficiencies would have sufficient cash income to buy much fish. Another problem is preservation; fish is now consumed fresh in the towns and coastal villages, and little remains to be dried. Preservation techniques are generally not correctly employed. With the establishment of refrigerated stores, it is possible that drying will not be necessary, but the question will need to be carefully investigated, both from the point of view of convenience and of cost.

154. The possibility of Comoros participating in industrial tuna fishing was studied by an FAO consultant in 1974 and by a Japanese mission in 1975. A detailed proposal has been prepared for a US\$15 million project based on Mayotte involving ten-200 ton fishing boats and a canning factory with refrigeration facilities for 5,000 tons. Production would be entirely for export and would not be permitted to undercut the local traditional fishing industry. The fishing boats would use as bait quantities of the small pelagic fish that abound in Mayotte lagoon, but future research is required to determine whether sufficient bait could be obtained on a regular basis without reducing the stock of pelagic fish on which the local fishermen depend. This project is presently held in abeyance.

1/ See para. 165.

2. INDUSTRY

Existing Manufacturing Activities

155. As yet manufacturing is of minor importance, providing employment for less than a 1,000. The most noteworthy activity is the processing of agricultural products for export, the main instances being the distillation of essential oils, the preparation of vanilla and the conversion of coconuts into copra. The few remaining activities are geared almost exclusively to the internal market. In addition to a variety of handicrafts, they include a sawmill, furniture manufacture, soap production and the bottling of soft drinks. In the past sisal rope and coconut oil were manufactured, but these activities have been abandoned. 1/ Most of the plant is of extreme simplicity, representing small investments and producing limited quantities of high-value goods. Between 1970 and 1975, registered employment in manufacturing increased steadily at an average annual rate of 18 percent. But it has declined substantially in 1976 owing to the closure of a number of firms following the departure of the French administration and the downturn in economic activity that ensued. It may be assumed that production has followed a similar trend.

156. Until recently the Comoros' perfume industry had a high degree of vertical integration. The main firms--Societe Bambao, Etablissements Grimaldi, Etablissements Kalfane, and a few others--owned the plantations, operated the stills, and marketed the essences abroad, often coupling their exporting activities with the wholesale and retail trade of imported goods. However, the transfer of estate land to small farmers 2/, which had already begun in the early 1970 and which gained momentum after independence, has favored the establishment of a relatively large number of small distilleries, many run by small traders, in competition with the large companies. A limited production is sufficient to ensure the profitability of a small distillery, requiring little investment. This trend, which may be considered positive to the extent that it helps to increase the producer price, is reportedly resulting in a poor and variable quality of the product, thereby accentuating the marketing problem viewed nationally.

157. The distilling of perfume essences requires important quantities of fuel, particularly since, owing to poor plant maintenance and, in the most recent period, to the deterioration of the equipment because of the failure to replace worn-out parts, the stills are very inefficient. Particularly after the increase in oil prices in 1974, producers have increasingly resorted to wood, thus placing additional pressure on the scarce forestry resources of the archipelago. Wood is also used extensively for copra-drying, and the savings that would be obtained by converting coconuts directly into oil, without first processing them into copra, is an additional justification for establishing an oil-mill.

1/ See para. 69.

2/ See para. 6.

158. The wood industry provides most of the timber needed by the construction sector 1/. Furniture and other wood products are manufactured both at the small factory and artisanal levels. The Societe Anonyme de Grande Comore (SAGC), a subsidiary of Societe Bambao, owns a saw-mill exploiting the large forest of Nioumbadjou in the southern part of Grande Comore. The wood from the saw-mill is used by four factories producing carpentry elements and furniture, one of which is operated by the Ministry of Public Works.

159. The two most recent manufacturing enterprises to be established are a small soap-factory in Grande Comore, and a soft-drink bottling plant in Anjouan; both began operations in 1975. The latter, which is entirely foreign-owned and has a work force of 30, expects sales to reach CFAF 100 million in 1977. The factory received a long-term loan of CFAF 65 million from CREDICOM and a medium-term loan for CFAF 40 million, made jointly by Banque des Comores and CREDICOM.

160. A variety of attractive, well-made handicrafts are produced, which points to a potential for the development of cottage industries. Until now, however, these goods have been mainly produced for the local market. The products range from filigree jewelry to colorful straw mats, carved wooden doors and furniture, embroidery, and leather sandals. At present, these objects are not easily available even to visitors staying several weeks in Comoros.

161. The Ministry of Production collected a broad sample of such objects for exhibition at the 1976 Dakar International Trade Fair, but little more has yet been done to find export outlets to which expanded production could be geared. Furthermore, there are no handicrafts training facilities and no adequate institutional framework to enable CREDICOM to channel credit to craftsmen. Dressmakers and tailors are numerous and capable, and are the two largest groups of craftsmen trained abroad 2/ and would appear to represent the most readily available potential, together with embroiderers, for expanding cottage industry activities. Too little is known about the sector, but from the fragmentary information available an in-depth study aimed at identifying ways of developing the handicrafts sector would seem to be justified.

The Construction Industry

162. Since the closure of the local branch of Compagnie Francaise d'Enterprises at the end of 1974, and of Societe Comorienne Immobiliere de Construction in May 1975, only one private building enterprise incorporated in the Comoros has been active. A small force account unit in the Ministry of Public Works carries out some construction and road maintenance. The private entrepreneur is building offices and stores for the

1/ See para. 163.

2/ See para. 220.

45 moudirias in the islands of Grande Comore, Anjouan and Moheli. At the beginning of 1977, the construction of many moudirias, which had begun less than one year earlier and which involves an important contribution of self-help work from the population, was well advanced. In addition, this enterprise is building a cold store in Grande Comore, at a cost of CFAF 11 million, with a capacity of 25 metric tons of fish, which will also produce 10 metric tons of ice daily for use by the 15 fishing boats to be distributed to fishing cooperatives. Equivalent cold stores are to be built in Moheli by the Public Works force account unit, and in Anjouan by an entrepreneur from La Reunion. Road construction is undertaken by two foreign contractors, namely Societe des Grands Travaux de l'Est and Societe Nationale des Travaux Publics. These two firms have been engaged in the main road expansion program initiated in 1974 with FIDES grants and continued after 1975 with finance from the Kuwait Fund. The work of the contractor is supervised by a firm of engineering consultants which maintains a small office in Moroni.

163. The construction industry uses locally made bricks and lava gravel. Also extensive use is made of sand taken from the few beaches, a practice which cannot continue indefinitely. Otherwise all building materials except timber are imported at considerable expense. Cement, which until the mid-sixties came directly from France, is presently imported from Mombasa.

164. The construction sector contributed 13 percent of total GDP in 1975. A large proportion is represented by traditional construction, not only of the more common dwellings made of wood and palm thatch, but also of soundly built stone houses often embellished with finely carved doors. Their construction, for which local materials are used almost exclusively, may last for generations. Customarily a family begins building a new house at the birth of a daughter and gradually completes it by the time she is ready to marry. Traditional construction techniques include the use of a mortar obtained by burning white coral in open air kilns, for which a disproportionate quantity of scarce wood are used.

Potential for Industrial Diversification

165. In recent years a number of industrial projects have been proposed, some of which have already been studied in some detail, while others are no more than ideas. Although the local market is extremely limited, there are nonetheless a few possibilities for establishing import substitution industries. For example, salt could be extracted from sea water; it has been proposed that such a plant might be located at Pamandzi in Grande Comore, covering an area of 10 to 15 ha and producing 1,000 to 1,500 metric tons of salt yearly, a quantity sufficient to cover the Archipelago's needs. However, the possibility of installing a larger plant and exporting the surplus production has also been suggested. Related to the fisheries project is a proposal to establish a government shipbuilding yard for the construction of 7-m motorboats with a production capacity of 30 boats yearly. The unit would be staffed by Comorians who have gained experience working in Madagascar's shipyards at Diego Suarez. Technical assistance for the project, the cost of which is tentatively estimated at US\$2.4 million, has been requested from FAO.

166. Further investment would appear to be justified in the processing of agricultural products for export. Possibly the most promising of all the projects so far mooted is that of a coconut-oil mill. Given Comoros' transport problems, the reduction in volume of its only bulky export item would alleviate pressure on the inadequate port facilities. The Government currently envisages a plant with a capacity of 9,000 metric tons of copra equivalent annually for the oil-mill, which would produce 6,000 metric tons of oil, of which 20 percent would be consumed locally, and 3,000 metric tons of oil cake, 20 percent of which would be used as cattle feed. Production of this magnitude, approximately double the average volume of copra exports until now, presupposes the eradication of rodents which currently consume 30 percent of the crop 1/. In fact, the preliminary report for the VII Plan 2/ suggested a capacity of 5,500 metric tons for the oil-mill, at a cost, in 1974 prices, of about US\$4.5 million. The production of vanilla essences is another possibility well worth investigation.

167. The possibility of resuming sugar production was investigated in a detailed study by Mauritian consultants (Technisucre) in 1974. The project was to be located on Mayotte, the island best adapted to sugar production, which in the 19th and early 20th centuries provided the bulk of Comoros' exports 3/. The only alternative to Mayotte is Moheli, where soil and climatic conditions also appear favorable to sugar cane growing, but where less land is available. The proposal is to produce 4,500 tons of sugar from 600 ha of cane. The financial rate of return was estimated at a low 7 percent, on the basis of an export price of 10 US cents per pound (in 1974 prices). While world prices of sugar in 1974 were double that level, their sharp reduction subsequently, and particularly at the end of 1976, indicates that even such a modest rate of return could perhaps be obtained only if the Comoros benefited from the preferential EEC price, to which Comoros may be entitled as a participant in the Lome Convention. The rate of return might, however, be improved by the purchase of second-hand factory equipment.

168. The Government recognizes that it does not possess either the capital or the expertise to mount new industrial ventures. The policy is to encourage private foreign investors who may seek a minority state participation. The Government does not insist on its participation and is generally opposed to nationalization, except in extreme cases, where

1/ See para. 136.

2/ Preparation du VII Plan Rapport de la Sous-Commission "Production", Ministere des Finances et du Plan, 1974.

3/ See para. 69.

state control appears essential to protect the national interest. The Government has intervened in the industrial sector only once so far: in 1976 it took over the forestry concession worked by SAGC to supply its sawmill on Grande Comore when it became evident that the company was accelerating the exploitation of the timber without replanting, thereby causing the rapid depletion of the island's best timber resources.

169. Recent political uncertainties have caused potential investors to shy away, and the Government will now have to take an active role in rekindling interest. Present willingness to grant generous fiscal incentives on a case-by-case basis is not sufficient. Responsibility for promoting industrial activities is split in theory between the Ministry of Production, the Vocational Training Service (SFOP) and the newly created National Office of Commerce. In practice the National Office is not yet operational, and the Ministry lacks staff with the requisite experience and financial support. SFOP, which is responsible for assisting artisanal industries, is also not yet staffed to handle this task. One possibility would be to leave the regulatory functions (such as the quality control of exports) to the Ministry and to expand the role of new Banque Nationale des Comores (BNC) by creating within it a small unit for industrial promotion. The unit would identify possible industrial projects, carry out or commission feasibility studies, and seek suitable investors. In this way BNC would be transformed from a passive credit institution into a dynamic development finance corporation. The unit should be concerned not only with the relatively large projects of possible interest to foreign investors, but also with handicraft industries working closely with SFOP. The National Office of Commerce should deal only with commercial questions.

3. TOURISM

170. Given the need to diversify the Comorian economy and the importance of tourism on other Indian Ocean islands, the possibility of similar development in the Comoros deserves careful investigation. Indeed, the completion of an international airport on Grande Comore might suggest that Comoros could repeat the experience of the Seychelles. In fact, the potential for tourism appears limited. The archipelago is endowed with few fine sandy beaches that might attract mass tourism. It lacks the facilities and infrastructure essential for a rapid growth in the number of visitors and it is doubtful whether the expenditure necessary for their creation would be economically justified. Even if mass tourism could be developed, it is questionable whether the economic benefits would sufficiently outweigh the social costs.

171. Yet Comoros is undoubtedly capable of attracting the sophisticated traveler with money to spend, who seeks unspoiled scenery in relatively undeveloped areas, combined with places of cultural and human interest. The archipelago, with its tropical climate, interesting old towns, luxuriant vegetation and varied marine fauna appears best adapted to catering to the more affluent tourist. Each island has its special features:

Grande Comore has its dramatic volcano; Anjouan, its mountainous landscape; Mayotte, a fine coral lagoon; and Moheli, wild deserted beaches. Tours carefully tailored to the interests of the visitor who can afford to pay for such personalized service are likely to bring the highest returns with the least social disruption.

172. To date few initiatives have been taken to develop tourism of any kind. At present, there are seven hotels (four on Grande Comore and one on each on the other three islands), but one 7-room hotel on Grande Comore and the small establishments on Mayotte and Moheli are hardly suitable for international tourists. Moreover, the largest of the hotels on Grande Comore has been closed for a lengthy period and is now undergoing extensive renovation. Thus at present, for tourist purposes, there are only three functioning hotels, two of which are owned by the semi-public Comoros Hotel and Tourism Company (SHTC) 1/.

Table 33: TOURIST INFRASTRUCTURE

	<u>Hotel</u>	<u>Rooms</u>	<u>Hotel Beds</u>	<u>Restaurants</u>
GC	3	81	162	5
Anjouan	<u>1</u>	<u>16</u>	<u>32</u>	<u>1</u>
Archipelago	4	97	194	6

Source: Bureau d'Etudes Economiques et Statistiques.

173. Even this rudimentary infrastructure has been underutilized in recent years. Assuming an average stay of one week per person, the estimated 1,200 "pure" tourists per annum have occupied only about 12 percent of the available hotel beds. For a multiplicity of reasons, the total number of visitors have varied widely from year to year, creating a fluctuating demand for hotel accommodation. Also, prior to independence the hotels and restaurants were much busier over weekends than during the week as a result of the patronage of the large number of resident expatriates. About 60-70 percent of the visitors came from Europe and the rest from Africa, mostly from South Africa. Given recent political developments, the number of South African visitors in future is likely to be small, but this might be at least partly compensated by an inflow from Arab countries.

1/ Societe Hoteliere et Touristiques des Comoros.

Table 34: TOTAL NUMBER OF VISITORS

<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
714	1,728	836	3,465	3,000	2,000 ^P

P = provisional

Source: Bureau d'Etudes Economiques et Statistiques.

174. Tourism is the responsibility of a new Directorate of Tourism recently created within the Ministry of Foreign Affairs, which is, as yet, understaffed. Comoros, together with La Reunion, Mauritius, and the Seychelles, is a member of the Indian Ocean Tourism Association (ATOI) 1/. Created in 1967 to promote tourism in the region, ATOI did not succeed in assisting each of its members equally, although the annual contribution of each member is a uniform sum of CFAF 3 million, irrespective of the importance of its tourism industry. Comoros does not appear to have benefitted much from ATOI, and in future may have to rely more on its own promotional efforts. With this objective in view, a Comores Tourism Development Company (Comortours) 2/ was formed in 1976. Besides promotional activities abroad, Comortours will centralize purchases of goods needed by the hotels participating in the scheme in an attempt to reduce hotel prices from their present high level. The Comortours has an equity capital of CFAF 10 million, 51 percent owned by the two private hotels in Grande Comore and 49 percent jointly owned by the Comorian State and SHTC.

175. In 1974 consultants 3/ were engaged to prepare a detailed study on the possibilities for tourism development in the Comoros. Their report remains the Government's blueprint for the sector, although it is acknowledged that the phasing will need to be revised. Taking as a starting point the 1,200 "pure" tourists then visiting the Comoros each year, the consultants proposed to double this figure, mainly by expanding promotional efforts and making modest improvement in the existing infrastructure, but without any major investments. Around 80 percent would be tourists from Europe participating in jet tours to different destinations in East Africa or the Indian Ocean, and 20 percent regional tourists. On the average, they would stay 6.4 hotel-nights, and spend each some US\$400. 4/ As a next stage, the consultants proposed that 130 hotel rooms (including 30 in Mayotte) should be built during the second half of the 1970s at a total cost of CFAF 840 million, which would eventually accommodate over 5,000 visitors a year. This would be followed by a second phase of investment involving 240 rooms (60 in Mayotte) in the early 1980s at a cost of

1/ Alliance Touristique de l'Ocean Indien.

2/ Societe pour le Developpement Touristique des Comores.

3/ SEDES-BCEOM (Paris).

4/ All sums quoted in this paragraph relate to 1974 prices.

CFAF 1,550 million, allowing the Comoros to accommodate up to 17,000 tourists annually. A final phase of investment -- which would begin in the late 1980s and would continue well into the 1990s -- would result in 880 additional hotel rooms (310 in Mayotte), requiring an outlay of CFAF 5,670 million. The annual hotel capacity would thus eventually reach 750,000 bed-nights, accommodating 65,000 annually at a 60 percent rate of occupancy. This is considered by the consultants to be the saturation point.

Table 35: PROPOSED INVESTMENT IN NEW HOTEL ACCOMMODATION

	<u>1st phase</u>	<u>2nd phase</u>	<u>3rd phase</u>	<u>Total</u>
Grande Comore	90	120	390	600
Anjouan	10	30	110	150
Mayotte	30	60	310	400
Moheli	-	30	70	100
Total no. of rooms	<u>130</u>	<u>240</u>	<u>880</u>	<u>1,250</u>
Total cost (millions CFAF in 1974 prices)	<u>840</u>	<u>1,550</u>	<u>5,670</u>	<u>8,060</u>

Source: SEDES-BCEOM, Etude de developpement touristique de l'Archipel des Comores.

176. The cost estimates include not only the actual construction cost, but also the vehicles, equipment and promotional expenses, amounting to 13-14 percent of the total. However, they do not include additional investment in infrastructure directly related to the development of tourism, which might include new roads, small marinas, buses and boats, tourist offices abroad, and possibly even a new international airport in Mayotte. According to the study, the investment in infrastructure would amount to about 25 percent of the hotel cost, bringing the overall cost of the program to some CFAF 10 billion (US\$41.5 million) in 1974 prices.

177. Unfortunately, the financial rate of return indicated by the study is a low 7 percent and would therefore require a substantial portion of low interest public finance to bring the rate of return on the private capital involved to a level acceptable to private investors. The study estimates the economic rate of return at 50 percent, thereby justifying the provision of concessionary finance; regrettably, no details of this calculation are presented. Finally, the study indicates that direct job creation will amount 1.5 to 1.8 jobs per hotel room, at a capital cost

of CFAF 3.5 to 4 million per job. This cost is high, even if allowance is made for additional job creation in related activities. Moreover, even when the suggested saturation point is reached, it is unlikely that more than 2,000 jobs would be created.

178. The proposal to subsidize tourism development should be viewed with caution. The experience of other countries which have invested heavily in tourism suggests that the net benefits accruing to the residents is much lower than is indicated by the high economic rate of return calculated by the consultants, while the return to investors has certainly been higher than 7 percent. Mauritius, for example, has recently reappraised its tourism sector and now accords investment in it a much lower priority than before. The danger is that when all the import bills have been met, and interest and dividends paid on foreign capital, little of the foreign exchange brought in by the tourists remains behind in the country. A prudent approach for the Comoros to adopt would be to promote foreign private investment in tourism, including providing fiscal incentives, but to devote very little public capital to this sector. In this respect every encouragement should be given to Comortours in the form of administrative assistance but, at the same time, a tight rein should be kept on government budget allocations for tourism. The long-term target of 65,000 tourists a year may perhaps be higher than can safely be absorbed, given the fragile social structure, but the ultimate optimum development of tourism is a question that may be settled later. The immediate challenge for the Government is to attract suitable investors without granting excessive privileges or making any significant outlay with public funds.

4. PHYSICAL INFRASTRUCTURE

Transport Constraints

179. Comoros' isolation, the smallness of its islands and their rugged topography, all combine to create special transport problems. Transport, therefore, is relatively expensive, yet the needs are substantial. The country depends heavily on foreign trade and, also, there is a natural exchange of crops between the coast and the interior. The country is densely populated (with 154 inhabitants per km² in 1976) and family ties are widespread; hence the movement of people both intra- and inter-island is considerable.

180. Because it has no natural deep water port enabling large ships to call, Comoros faces problems similar to those of a less developed landlocked country: long distances to its foreign markets and dependence on neighboring countries' ports for its long-distance traffic. When both the Comoros and Madagascar were under French administration, closer relations developed between these two countries than between the Comoros and other neighbors. For many years the Comoros have depended mainly on Madagascar's port facilities for transshipments to its own smaller ports of Mutsamudu and Moroni. Only small volumes go via Dar es Salaam and Mombasa, and despite being nearer,

no traffic is routed through Nacala, since Comoros does not yet have established trade links with Mozambique. Partly to overcome the sea transport constraint, the French administration developed air traffic.

181. The problems of isolation are compounded by Comoros being an archipelago, with islands between 100 and 300 km apart; each island requires an airport and port, and even when international standard facilities are built at one island, the others remain dependent on costly transshipments. Furthermore, during the monsoon period, cyclones often disrupt navigation.

182. Transport within each island, is also difficult since the topography is very rugged, the island being of recent volcanic origin. The coastline is generally formed of rough, rocky, black lava and basalt, which prevents even small boats from landing safely except on a few beaches. Therefore, coastal shipping has not developed; instead, on each island coastal roads were started, radiating outward from the only port. This facilitated export flows, as the main export crops are grown and processed near sea level. But, in general, only tracks connect the coast with the interior plateaus, where food crops are grown. There are no navigable rivers. Road construction and maintenance is expensive, yet all-weather links are a precondition for agricultural development; most produce is quickly perishable and needs, if not fast, at least uninterrupted transport services. Because of the pronounced gradients, clayish soils and rains averaging 2.5 m per year, virtually only bitumen paved roads provide year-round communications.

183. Although the Government's basic policy objectives in the transport sector are clear, with top priority being given to constructing an international port at Mutsamudu and to completing the main network of paved roads, a detailed transport plan does not exist, nor does the Government have the staff to prepare one. The timing of investments and the priorities between modes have yet to be clarified. Technical assistance to strengthen the Government's professional staff for both transport planning and project implementation is an urgent requirement.

Sea Transport

184. Maritime transport remains the main transport mode for both exports and imports, but is hindered by the poor port infrastructure. Two of the islands -- Anjouan and Grande Comore -- have small artificial harbors, which allow berthing of one vessel ^{1/} at a time, but limited to ships of 3,000 and 500 tons, respectively. Lighterage, where required, is undertaken by dhows (boutres), but is often impossible during the cyclone season, when calls by ocean-going ships are reduced to a minimum. The commercial operation of port facilities has been delegated to a new organization, the National Office of Commerce (NOC), established in April 1976 to replace the private Chamber of Commerce. The other tasks of NOC range over a great variety of fields, from the promotion of industry, tourism and trade to vocational training. At the end of 1976, however, NOC was hardly operational.

^{1/} Two small vessels can berth at Anjouan at one time.

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185. ²¹¹³ The Government is aware of the importance of maritime traffic and has endeavored to reorganize it, mainly by taking a minority participation in a private company, Societe Comorienne de Navigation (SCN), which owns a 500-ton coaster (El Mabruk) used for transport to and from neighboring countries' ports. Moreover, at the end of 1976 the Government bought a 400-ton cargo ship (Moinantsi) which will also be operated by SCN. In addition, the Comorian State owns a 60-ton ship (Tritonis) equipped to transport petroleum products from Tamatave to the archipelago. As about 40 percent of its loading capacity can be used for cargo, it also serves as the main interisland link. In early 1977 the Government bought a second-hand 400-ton ship with beaching facilities (LCT) which will be used by SCN mainly for interisland transport, both for passengers and cargo. Dhows are operated by Compagnie Maritime Comorienne, a parastatal company. 1/ A Malagasy ship regularly transports cement from Mombasa to the Archipelago.

186. Four international shipping companies (two French, one Norwegian and one German) have established links with the Comoros, but the service is intermittent. Most cargo is delivered either to Majunga or to an East African harbor, from where it is transshipped to the Comoros with significant delays and losses from breakage, pilferage and mishandling of the cargo. To alleviate these problems the Government proposes to develop one port with a berth capable of accommodating ocean-going ships. The port chosen by the Government for this purpose is that of Mutsamudu, situated on the northwestern coast of Anjouan, the central island of the archipelago, 500 km from Majunga and 800 km from Dar es Salaam. Between 1965 and 1967 the jetty was extended to its present length of 170 m and, according to preliminary studies, it could be further extended by approximately 120 m at a cost of about US\$15 million in order to enable the 12-16,000 ton ships commonly in use in the Indian Ocean to berth alongside. The improvement of port facilities in Grande Comore and Moheli to facilitate transshipment to and from these islands once Mutsamudu has become the international harbor for the whole archipelago is also envisaged.

187. At present on average less than one ship per day is handled at either Moroni or Mutsamudu, and the unloading/loading operation takes no more than a day. Moreover, lighterage does not compete with quay operations for quay space or handling equipment. About one third of the traffic is petroleum products which are unloaded through marine terminals. The present port utilization rate at both Mutsamudu and Moroni is under 50 percent and ships are rarely delayed because of queuing. Fomboni in Moheli handles only 4,000 tons of cargo a year, transported mainly by dhows which are unloaded/loaded across the beach. The low volume of traffic, rather than the inadequacy of the ports is the main reason why large ships rarely call at the Comoros. On none of the three islands does it appear that the port itself is a critical bottleneck and major investments in port improvements will be hard to justify on economic grounds until traffic has grown considerably.

1/ After April 23, 1977 during the period of government reorganization, the Popular Army has taken control of the LCT and Moinantsi, and also the management of the ports.

Civil Aviation

188. Air transport offers an effective, if high cost, means of overcoming sea transport delays both interisland and abroad. The high value/weight ratio of many export items permits a large proportion by value of Comoros' export trade to be shipped abroad by air. Also meat and vegetables are predominantly imported by air cargo, as this is the only means of supplying fresh merchandise. However, in all, only one to 2 percent of total foreign trade by volume is transported by air.

189. Interisland air services are especially important for the transport of passengers. Despite tariffs being double those of ship transport, about 85 percent of passenger traffic is carried by air, which indicates the inadequacy of present ship services. In contrast only 5 percent of interisland cargo traffic is carried by air, which is not surprising since air freight costs are approximately 15 times the cost by sea.

190. Each island has a small airport with tarred airstrips suitable for the DC4 operated by Air Comores, which provides interisland connections two or three times a week. 1/ The Iconi airport near Moroni is also used by Air Madagascar's Boeing 737 jets, but its 1,500 m runway does not allow these aircraft to take off with full load. In addition, an international airport with a runway 2,800 m long accommodating jumbo jet aircraft has recently been built at Hahaia on Grande Comore. However, as investments were interrupted at independence and some essential services are still missing, the airfield has not yet been officially opened. After its completion, the runway started settling along its center portion; although repairs have been carried out, it is as yet unclear whether further major works will be required because of the instability of the underlying rock structures. At present, the Hahaia airport is only used occasionally by Air Madagascar and for technical stopovers by Air-Gabonais cargo aircraft. The Government hopes to have the missing aeronautical aids installed during 1977, thus enabling the airport to be opened officially to international traffic.

191. The completion of the Hahaia airport is important as it would allow Grande Comore air traffic to operate out of one airport only, thereby reducing overhead costs and putting less pressure on the scarce technical personnel. The departure of 15 French civil aviation specialists in December 1975 created grave staffing problems to which were added severe financial difficulties, as the civil aviation budget had been previously met directly by France. Other investments needed at Hahaia include freight and aircraft hangars 2/ and a radar cyclone forecasting system 3/ as the one existing in Madagascar does not entirely cover the Comoros. The Government will also need expert legal and commercial advice to assist it in negotiating traffic rights with international air companies, with a view to deriving maximum financial advantage from this important infrastructure investment.

1/ Anjouan airport now needs to be resurfaced at an estimated cost of CFAF 222 million.

2/ Estimated at CFAF 400 million or US\$1.6 million (in 1976 prices).

3/ Estimated at CFAF 200 million or US\$0.8 million (in 1976 prices).

192. Air Comores was started as a private company at the beginning of the 1960s. After March 1975 it was 51 percent owned by Air France; the remaining shares were held by the Comorian State. In April, 1977 Air France's shares were transferred to the Comorian State, thereby converting it into a parastatal company. Besides interisland flights (including Mayotte), Air Comores operates flights to Madagascar, Kenya and Tanzania. The company is predominantly run by expatriates and was still profitable in 1975, when it managed to produce a small profit despite reduced traffic after independence. However, preliminary figures for 1976 indicate that the cash-flow decreased by about one third and that the company incurred a loss. In 1976 Air Comores' two DC4s were operated at about 50 percent of their potential.

Road Communications

193. Because export crops are produced mainly along the coastal strip, priority has been given in the past to a coastal ring road on each of the islands, while feeder roads penetrating the hinterland are to a large extent missing. The interior areas produce almost exclusively foodstuffs, which, although mostly consumed locally, are also exchanged against imported goods and foodstuffs produced in the coastal areas, such as fruits and fish. This regional specialization gives rise to a substantial demand for transport of merchandise. If the Government's policies for agricultural development are successful and, as a consequence, the volume of imported foodstuffs is reduced, this traffic is bound to grow considerably. To reach some villages goods must be carried along narrow paths or transported over rudimentary tracks only suitable for four-wheel drive vehicles.

194. There has been a steady increase in new registrations of vehicles since the beginning of the 1960s, averaging 10 percent between 1961 and 1975. If new registrations are divided among the islands, however, it appears that the growth is largely attributable to Grande Comore, particularly after the transfer of the capital. In this island, the number of vehicles per 10,000 inhabitants is about 4 times higher than in Anjouan and Moheli. The commonest form of vehicle is the light utility car (such as the Peugeot stationwagon) used for the transport of both passengers and merchandise. The number of new registrations of four-wheel drive vehicles has declined sharply in recent years as roads have been improved.

Table 36: NEW REGISTRATIONS OF VEHICLES AND CUMULATIVE TOTAL

	<u>1961</u>	<u>1975</u>
Light vehicles, new registration	69	282
Industrial vehicles, new registration	25	31
Cumulative registrations	815	3,998

Source: Bureau d'Etudes Statistiques et Economiques and, since 1973, Bureau SECMO.

195. Construction of a comprehensive network of all weather main roads was started only in the late 1960s. By 1970 one stretch of main road had been opened in Grande Comore: that along the northwestern coast. In Anjouan,

a road completed in 1964 linked the port of Mutsamudu to Domoni, passing through the Societe Bambao plantations. The main roads under construction at independence, when French financing was interrupted, included the completion of a large portion of the coastal ring road and the main transversal link in Grande Comore, and the extension of the coastal road from Simia to Pomoni in Anjouan. After a period of uncertainty, the Government secured a loan from the Kuwait Fund permitting the resumption of construction in 1976. The present phase of construction should be completed by the end of 1977. Feeder road construction is being undertaken with assistance from the World Food Program, which is providing food for 1,000 workers in Grande Comore and 500 in Anjouan. There is indeed a long tradition of village self-help road construction, but nothing on the present scale had previously been attempted.

Table 37: ROAD NETWORK, April 1977

	<u>EARTH</u>	<u>PAVED</u>	
		<u>Completed</u>	<u>Under Construction</u>
Grande Comore	199	143	67
Anjouan	87	79	21
Mayotte	109	30	n.a.
Moheli	88	30	-
Archipelago	483	282	n.a.

Source: Ministry of Works.

196. Paved roads are generally in good condition since most have been constructed only recently and, with low traffic volumes, little need for maintenance works has yet arisen. Earth roads require constant maintenance and are generally in poor condition. Current budget allocations for road maintenance bear no relation to needs. In accordance with its overall decentralization policy, the Government proposes to devolve to local entities its roads maintenance operations. To ensure that the new arrangements are effective, specialists need to be engaged to help establish an optimal organization. It is vital that the new maintenance arrangements are made with the minimum of delay as, in the absence of maintenance, the roads will deteriorate rapidly.

197. After the present construction program has been implemented, a further phase is planned to complete the basic network of paved main roads. This includes construction of an inland circular road in the Nioumakele peninsula of Anjouan to serve several large villages which are now almost totally cut off from the rest of the island; the extension of Moheli's northern coastal road; the completion of the coastal road on Grande Comore; and the paving of the road around the southern side of the Khartala. This program, which appears to be economically justified, merits the support of external aid agencies.

198. Preliminary engineering design has been completed for this next phase, but detailed engineering has yet to be done. However, there is no implementation plan nor any staff capacity to prepare one and carry it out. It will therefore be necessary to engage consultants to prepare projects for external financing and to supervise their implementation.

Since the volume of construction is low, it will be difficult to find sufficient contractors to make tendering competitive and, in any event, work by contractors will be costly owing to the Comoros' circumstances. The Government is therefore considering establishing force account units. For maximum efficiency, these units should be permitted a large measure of operational flexibility; external technical assistance will be required to assist in their establishment.

Telecommunications and Postal Services

199. Existing telecommunications installations are insufficient to meet the demand for services. All existing equipment is used to capacity and 600 requests for connections remain unmet. Latent demand is estimated to amount to at least another 300 connections. Grande Comore's central exchange at Moroni has at present 800 lines, while an exchange at Mitsamiouli has 50 lines; Fombouni is linked to Moroni by VHF radio. On Anjouan, the facilities are even fewer; there are three exchanges with a total capacity of only 150 lines (100 in Mutsamudu and 25 each in Ouani and Domoni), which are fully used. Mayotte and Moheli have 50 and 60 lines, respectively. The present interisland and international radio-telephone links are also inadequate. Interisland communications pass by radio and by telegraph, but the quality is poor. Communications with the rest of the world depend on a one-way radio link with Antananarivo and a two-way radio link with Paris; both operate for only a limited number of hours daily.

200. To better meet the demand for telecommunications services, a number of investments are envisaged. The European Development Fund has earmarked some CFAF 550 million to assist these developments. The Government proposes to expand the Moroni exchange to a capacity of 1,000 lines 1/; this, however, would leave unsatisfied a demand for at least 150 lines in the other four main urban centers of Grande Comore. The total present demand on Anjouan is estimated at about 375 lines; technical studies have been completed for the installation of a new automatic switchboard of 400 lines 2/. Technical studies have also been carried out for the installation of a VHF network for interisland communications; the investment needed would be considerable 3/ since a number of high pylones would have to be constructed. To improve international communications, the Government has plans to open links with Dar es Salaam and with one Asian capital.

201. There are presently only 9 post offices in the archipelago, 4 of which are on Grande Comore, 2 each on Anjouan and Mayotte and one on Moheli. New post offices are eventually to be opened in each moudiria. For the moment the post office functions are limited to mail and money order services, but its responsibilities are to be expanded to include the management of a new savings bank which the Government wishes to establish. The

1/ At a cost of CFAF 13.7 million in 1974 prices.

2/ Costing about CFAF 44 million in current prices.

3/ About CFAF 700 million in 1974 prices.

operation of the savings banks would be greatly facilitated by having post offices in each moudiria.

202. The postal and telecommunications services are currently being reorganized as a parastatal organization. Since the departure of the French, the services have been run by Comorians with little external assistance. However, to ensure an optimum new organization is established, expert advice is needed, particularly on the financial aspects; a review of tariffs may be necessary to ensure viability. Also, the present arrangements for the printing and sale of stamps deserves review. The stamps are printed by a foreign company which apparently retains the right to sell the stamps to philatelists, whereas this could be a significant source of government revenue.

Power Supplies

203. Public power supplies are provided by Electricite des Comores (EDC), a government-owned statutory corporation, which operates thermo-electric power stations on Grande Comore and Anjouan; before independence EDC also operated a power station on Mayotte. In addition, a private company (Societe Bambao) owns and operates three hydroelectric plants in Anjouan, mainly generating power for its own industrial use. A 450 KW central generating station is being established on Moheli, but is not yet operational.

204. The largest investments in electric power production have been made on Grande Comore: EDC's installed capacity there was increased five-fold between 1966 and 1976, bringing it to 1,500 kw, while on Anjouan it was enlarged only twofold over the same period to the present 320 kw. At independence Mayotte had 190 kw of generating plant. Societe Bambao's total installed capacity on Anjouan amounts to 560 kw. Small generators are installed in airports, hospitals, and for use by the telecommunications service on Grande Comore, Mayotte and Moheli, but not on Anjouan. The same imbalance among the islands is to be found in the extension of the EDC network. While Grande Comore's total network ^{1/} extends over 104 km, covering most of the western and southern coast and reaching to some settlements in the interior, Anjouan's network, is only 22 km long, being concentrated in the two main towns, Mutsamudu and Domoni.

205. EDC's production is predominantly used for lighting, reflecting the low level of manufacturing activities and the comparative advantage of wood as a source of heat for the distilleries. Therefore, although the 1976 price of electricity for industrial use was 13 percent lower than for domestic use, only 18 percent of total EDC's production was utilized by industries. The industrial price of power (CFAF 35.65 or 14.6 US cents per kwh) is, however, high by international standards.

^{1/} Including low- and medium-tension lines departing from thermoelectric stations and self-generating groups.

Table 38: ELECTRICITY PRODUCTION BY EDC
(in '000 kwh)

	<u>1966</u>	<u>1971</u>	<u>1976^e</u>
Moroni (GC)	836	2,428	3,273
Mutsamudu (Anjouan)	300	484	661
Domoni (Anjouan)	-	65	173
Total	1,136	2,977	4,107

e = estimated

Source: Electricite des Comores.

206. Since there are no perennial rivers on Grande Comore, the island has no hydroelectric potential and therefore depends on diesel generators. The construction of a second 2,400 kw thermoelectric station in Grande Comore, located at Voidjou, is now underway and is expected to be completed by mid-1978. This is likely to be sufficient to meet demand for power on Grande Comore for several years to come. In contrast, Anjouan has a hydroelectric potential estimated at 10 MW and the Government now proposes to construct a 3 MW station on the Tatinga River at a cost approaching CFAF 2 billion (US\$8 million). In view of the low present demand and the likelihood that demand will rise slowly, alternative small schemes merit investigation. Moheli has a modest hydroelectric potential estimated at 460 kw; as a first stage a 240-kw station might be established on the M'ro Duambimbini River. In order to provide each moudiria with electricity for lighting and for the operation of its refrigeration plant, those not connected to the main distribution systems will be equipped with small generators. At the end of 1976, twenty such generators had been ordered, each costing CFAF 6 million (US\$24,000). This equipment will have a high operating cost and will give rise to maintenance problems.

Water Supplies

207. While the whole archipelago enjoys plentiful, if irregular, rainfall, only Anjouan, Mayotte and Moheli possess perennial streams which assure the population of adequate water supplies. The rocks and soil cover on Grande Comore are too porous to support any permanent water course and, consequently, the provision of adequate water supplies is problematic. Settlements depend either on rainwater storage tanks or on wells which tap an underground reservoir of fresh water floating over salt water which seeps in from the sea.

208. The rainwater storage tanks give rise to two difficulties. First, many of them, being old and poorly maintained, present a serious health hazard; contaminated water is a major cause of the widespread incidence

of gastroenteritis and similar illnesses. Second, the amount of storage is insufficient to meet the needs of the rapidly expanding population, and water shortages are increasingly frequent during the dry season which may last from May through October. In some areas in the interior of Grande Comore the lack of water explains the low population concentration and the failure to fully exploit the land.

209. None of the urban areas has a comprehensive water reticulation system and few houses are connected to a public water supply. Moroni is mainly supplied by a few large public reservoirs and some private ones. The charge for privately supplied water is relatively high during the dry season. A FED-financed project completed in 1976 now enables water to be pumped into the public reservoirs from a well sunk 2 km inland, thus assuring the capital of a year round water supply.

210. With FAO assistance a variety of techniques have been elaborated for improving the existing storage tanks and for constructing new reservoirs using plastic or rubber liners. A flexible lining capable of being produced locally has been devised, consisting of bitumen and sand applied to coconut fibre. However, the results of this research have yet to be applied. What is now needed is a practical program to assist the moudirias to improve communal water reservoirs. In the larger villages and towns on all the islands investment is required to install basic water distribution systems. Over the longer term, the possibility of using an extinct crater for water storage deserves study.

5. EDUCATION

Background

211 For several centuries a traditional system of universal education has provided the Comorian population with a grounding in the basic tenets and practices of Islam. All children attend the Koranic schools for two or three years, usually starting when they reach 4 years of age. The schools have the simplest of facilities and the teacher's only remuneration is one day's labor a week contributed by each child to assist the teacher to cultivate his land. This "basic" educational system survived throughout the colonial period, imbuing each generation with the traditional Comorian cultural values, thereby playing a key role in creating a culturally homogenous and unified society. The colonial authorities instituted, side-by-side with the Koranic schools, a typical modern system of formal education, strictly modeled on that of metropolitan France. Virtually no attempt was made either to expand the scope of the Koranic schools or to integrate them into the modern system of primary education.

212. At independence the Comoros inherited a formal educational system that was both internally and externally inefficient. Only half the children received any modern schooling and only one in five entered a secondary school. The high failure rate reflected both the poor teaching and the inadequacy of the facilities. Neither the primary nor the secondary school curriculum was adapted to the Comorian situation; consequently, the children emerging from the system at the different levels were ill-prepared

to make a contribution to the development of their country and generally lacked the skills required for adult life. The new Government, recognizing the critical role of education in the development of the archipelago, has embarked on an ambitious reform with the objective of ensuring that the schools are well integrated into the life and needs of the local communities they serve.

The Colonial Heritage

213. In 1975 the Comoros possessed some 142 primary schools, 5 junior secondary schools, two senior secondary schools (lycees) and a teacher training institute. For higher education students were sent abroad. Facilities for technical and vocational training were virtually non-existent. The curriculum was essentially the same as that provided in France, especially at the secondary level where the vast majority of the teachers were French. The teaching, dispensed in a foreign language (French), had a strongly academic bias. The six-year primary cycle was essentially aimed at preparing pupils for entry into the secondary cycle while the secondary school curriculum was geared to the final baccalaureat examination taken after seven years of study. The hope of most pupils was to gain access to an institute of higher learning in France. Few of those fortunate enough to win scholarships to study overseas have returned to work in the Comoros. Thus at every level the educational system effectively alienated the student from his home environment, and from the realities and needs of his community.

214. Starting from a very low level, school enrollments have risen sharply in recent years. In 1960-61 only 3,604 pupils were enrolled at the primary level, while the corresponding figure in 1976-77 was over 42,000. Despite this rapid rate of growth, still only 51 percent of the primary school-aged population 1/ were attending school at the beginning of 1975 compared to 9 percent in 1960. This implies that a very high proportion of the population are functionally illiterate, although many can read the Koran (without necessarily understanding it). Enrollment ratios vary markedly among the islands, being over 60 percent in Moheli, but only about 25 percent in Anjouan, in Mayotte and Grande Comore the ratios are close to the mean. Another notable trend has been the increase in the proportion of girls attending school; whereas in the early sixties only one pupil in 10 was a girl, the proportion now is approximately one in 3.

1/ Defined here as those aged 8 through 14.

Table 39: SCHOOL ENROLLMENTS

	<u>1970-71</u>	<u>1974-75</u>
Primary School	15,125	28,898
of which girls	4,780	10,158
Secondary School	1,274	4,004
of which girls	322	1,048

Source: Ministry of National Education.

215. Although the number of teachers and classrooms have also greatly increased recently, the Government has not managed fully to keep pace with expanding enrollments. In 1975 there were 366 classrooms, or 264 fewer classrooms than teachers. Consequently many schools have adopted a double shift system; though this has some economic advantages the number of hours teaching each pupil receives daily is practically halved. Thus, while there are only 46 pupils per teacher, there are 76 pupils per classroom. This pupil/teacher ratio is only achieved by employing a substantial proportion of untrained teachers. Only a quarter of teachers in 1975 were fully trained; 40 percent had not even completed the first cycle of secondary education.

216. To date teacher training has been provided at an institute, opened in 1969, which is attached to the Moroni lycee. Originally planned with a teaching capacity for 60, owing to a shortage of boarding facilities, it has in fact so far produced only an average of 21 graduates per year. This is insufficient even to replace the normal annual attrition of the existing teaching force, not to mention providing for the continued rapid expansion of primary enrollments.

217. The rapid expansion of secondary education began very recently, but has been no less dramatic. Enrollments more than doubled in the last two years of the colonial administration from 1,466 in 1971-72 to 3,779 in 1974-75. Approximately 30 percent of the students enrolling for the 1975-76 school were in their first year. Just prior to independence 193 pupils attended the junior secondary school located on Mayotte and 211 attended private schools which have subsequently closed. The disequilibrium between sexes noted at the primary level is even more marked in the secondary schools; only a quarter of those enrolled are girls.

Table 40: QUALIFICATIONS OF PRIMARY SCHOOL TEACHERS 1974-75

	<u>Number</u>
<u>Professionally trained</u>	208
of whom:	
- hold a baccalaureat	23
- have had four years of secondary education or more	145
- have had in-service training only	40
<u>Untrained</u>	422
of whom:	
- hold a baccalaureat	4
- have had four years of secondary education or more	172

1/ Source: Ministry of National Education.

218. The junior secondary cycle lasts four years (i.e. grades 7 through 10), and the senior cycle consists of a further three years of study. The secondary school system is characterized by a shortage of specialized facilities and equipment of all types, a curriculum totally unadapted to the Comorian situation, a lack of any provision for technical training and an almost total dependance on expatriate teachers. Before independence secondary education was administered directly by France and 88 percent of the cost estimated at approximately CFAF 1 billion was born by the metropolitan budget. Only 10 of the 210 teachers engaged in 1975 were Comorians; almost all the remainder were French. The Government has since drawn on the small group of Comorian teachers to staff the Ministry of Education.

219. The withdrawal of French technical assistance in the second half of 1975 forced the closure of all secondary schools except for the one on Mayotte. In response to an international appeal, the francophone Agency for Technical and Cultural Cooperation (ATCC) arranged for 43 teachers, mainly Belgians, Tunisians and Senegalese, to be sent to the Comoros. This assistance enabled classes to be resumed in May 1976 for all children in grades 10 through 13. 1/ The Government made special arrangements to establish a new examining committee recognized by all francophone universities; these

1/ 3eme, 2eme, 1ere and terminale.

were achieved in time for the students to sit the baccalaureat examination in November 1976. Students in grades 7 through 9 1/ hoped to recommence their studies in early 1977 after a lapse of 15 months. This will only be possible if the ATCC renews its technical assistance and if funds requested from the Arab League are provided to enable the Government to recruit sufficient additional expatriate teachers.

220. At independence the greatest lacuna of all in the educational field was the lack of facilities for vocational and technical training. From time to time over the past decade various minor initiatives have been taken, but most have been marked by failure. Two small trade training centers were started in 1972 - one at Mutsamiouli on Grande Comore for building trades and the other at Ouani on Anjouan for motor mechanics, plumbers and electricians. The first batch of 20 trainees were of such a low standard that, despite the shortage of skilled labor, employers were reluctant to hire them after the completion of their training and the centers were subsequently closed. The Chamber of Commerce 2/ has occasionally mounted evening classes for secretaries, but the actual training achieved has been very limited. In the absence of local vocational training facilities, funds were provided by France to send 86 trainee craftsmen overseas between 1968 and 1972. The two largest groups were dressmakers (16) and tailors (10). No post-evaluation of the scholarship program has been made, but it is reported that trainees have had difficulty in establishing themselves on their return in the absence of credit arrangements for the purchase of tools and equipment.

221. A UNDP-ILO project for vocational training initiated in 1974 is now well established. For the moment, trade training is being concentrated at the Ouani Training Center, while a variety of commercial and secretarial subjects are being taught in Moroni. A new service has been established within the Prime Minister's office with responsibility not only for all aspects of vocational training, but also for promoting the establishment of small scale industries. The Ouani Training Center accommodated 64 trainees in 1976 with training in the construction trades, auto-mechanics, refrigeration and electrical work. An expanded and strengthened program is planned for 1977, provided competent instructors can be recruited.

222. The number of students studying on scholarships overseas increased sixfold between 1970 and 1975. Despite a policy of bonding students to return to Comoros to work for the Government for ten years (or perhaps because of the policy), very few students have returned. There have been no manpower planning projections made to determine the country's needs for high and middle level manpower and little has been done to ensure that the number enrolling in different disciplines correspond to the numbers likely

1/ 6eme to 4eme.

2/ Now the Office National du Commerce (see para. 184).

to be required by the economy. Consequently, over the next three years, only 5 students are expected to graduate in agricultural sciences, although agriculture is by far the largest sector of the economy, whereas 40 doctors, dentists and pharmacists are presently being trained, probably more than the Comoros can reasonably afford to employ.

Table 41: NUMBER OF STUDENTS OVERSEAS IN 1976
BY YEAR OF COMPLETION OF STUDIES

<u>Course</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>
Humanities	2	2	18	-
Law	4	-	18	-
Economics & accounting	23	36	14	-
Agricultural sciences	-	5	-	3
Other sciences	4	6	24	-
Doctors, dentists & pharmacists	20	8	12	-
Engineers	18	5	9	-
Public administration	22	-	-	-
Other subjects	30	20	7	3

Source: Ministry of National Education.

Educational Reform

223. The Government has decided to introduce a system of basic education which is to be integrated into the life of each local community. The community will bear the main responsibility for the schools, aided by the central Government within the limits of its budgetary resources. As before, all children will start their studies at the Koranic schools, which will now be formally integrated into the official educational system. The schools will be assisted to expand their curriculum and modernize their methods. The pupils are to learn over a two-year period to read, not only the Koran, but also Comorian written in Arabic script. After the second year, the child will be introduced to Latin script which will be henceforth used for Comorian in all official publications. The schools are also to provide the children with training in basic manipulative skills in preparation for the formal program of basic education. The latter will cover 6 years. The content will be highly practical in orientation and as relevant as possible to local needs and conditions. Since most schools are located in rural areas, particular stress will be placed on agricultural studies accompanied by practical work. Emphasis will also be given to courses on nutrition, home economics and hygiene.

224. At present the formal primary cycle remains a six-year course, excluding the two preliminary years of Koranic training. The expectation is that in 1977 enrollments in this first cycle will reach 40,000 (excluding Mayotte and the refugees from Majunga), or nearly 80 percent of those aged 8 to 14, requiring some 900 teachers. Entry to the second cycle remains explicitly dependent on a satisfactory performance on the examination held at the end of the first cycle. Nonetheless, the problems currently confronting secondary education have been compounded by a government decision to lower the pass mark and, hence, to greatly increase admissions to the 7th grade 1/ in 1977. As a result over half the enrollments at the secondary level (some 3,000 pupils in all) will be in their first year. The majority of these are to be accommodated in single classroom schools (to be called "rural colleges") one of which is to be established in each moudiria. To overcome the shortage of teachers, the students who took the baccalaureat examination in 1976 have been required to teach in the rural colleges during 1977 at salaries equivalent to those of primary school teachers. This system of national service is likely to be repeated and possibly expanded in future years.

225. Over the next two years, the rural colleges are to be systematically expanded by adding an 8th 2/ grade in 1978 and an 9th 3/ grade in 1979. The full nine-year program of basic education will then be in place for a limited number of pupils. Education beyond the 9th grade is to be essentially vocational in character, with the numbers being trained strictly determined by the projected requirements for skilled manpower. At present the Government envisages mounting a four-year secondary program (i.e. 10th to the 13th grade) 4/ to be divided into two cycles, each of two years with five different branches of specialization: management and accounting, technical subjects, agriculture, teacher training and health. These programs will be provided at the existing secondary schools and teacher training centers. For post-secondary education selected students will be awarded scholarships to attend universities and specialized training institutions overseas, preferably in neighboring developing countries.

226. The physical means required to implement this ambitious plan, its phasing and the financial implications have not yet been studied by any detail. During 1976 an inter-ministerial committee on basic education was established together with a permanent secretariat. The latter is to be transformed eventually into the National Education Institute under the Ministry of Education to be responsible for the elaboration of curricula and the training of teachers. Considerable assistance has already been provided by UNICEF in devising a program of agricultural studies, accompanied by practical work. Suitable manuals have been prepared and a Rural Teacher

1/ 6eme.

2/ 5eme.

3/ 4eme.

4/ 3eme to terminale.

Training Center has been opened at Mvouni on Grande Comore. At present the center is providing a 9-month course for 40 first cycle teachers who will specialize in teaching agricultural and practical subjects. In addition groups of teachers are being given a one-month in-service course on basic education; the center can accommodate 20 teachers per session.

227. The financial requirements for the implementation of the Government's education sector plan depends critically on its phasing, but those elements already introduced are clearly beyond its budgetary means. Even in 1975, at a time when France was financing most post-primary education, the Comorian State was spending 35 percent of its budget on education. In 1977 the planned educational program will cost more than total domestic revenue and clearly the successful implementation of the reform depends on securing long-term external budgetary assistance.

228. The rapidly expanding teaching force alone will give rise to a salary bill beyond the Government's financial capacity, even though salaries were reduced in 1977. Up to the end of 1976 teachers were paid between CFAF 145,000 and 880,000 annually depending on their qualifications and seniority. The most junior and inexperienced teachers now receive a salary little above the basic minimum wage which gives no scope for further reduction.

229. If enrollments in the first cycle of formal basic education expand at the same rate as primary school enrollments have in recent years and assuming no repetition by 1980, all those aged 8 to 14 (numbering some 62,000, excluding Mayotte) would be enrolled. If enrollments were to reach this level and if the 1975/76 teacher/pupil ratio (46:1) were to be maintained and classrooms provided for each class, Comores would need to train at least 700 teachers and build an equivalent number of classrooms, neither of which appears feasible. With the opening of a second rural teacher training center as planned in 1979, the total annual output of trained teachers will reach 100, provided training is limited to nine months, rather than the two years originally envisaged. 1/ These would be sufficient to enable enrollments to be increased by some 4,000 annually. Any faster expansion of enrollments could only be managed either by reducing the pupil/teacher ratio or by employing more untrained teachers, either of which would result in a deterioration in the quality of education.

230. The second cycle of basic education, to be provided in the rural colleges, will be dependent at least initially on young totally untrained secondary school graduates with minimal supervision from experienced teachers. By 1980, however, it is envisaged that each rural college will have three classes, each requiring a teacher. If one of these were properly trained, he could closely supervise the two untrained teachers. The Government plans to train teachers for the rural colleges at the Moroni Teacher Training Institute. The course would last two years and trainees would have to have completed a minimum of two years of secondary education.

1/ Request to UNICEF dated January 1976.

231. There is little question that a major reform of the educational system inherited at independence was necessary. The proposed system of basic education is rightly concerned to make schooling relevant to the needs of young Comorians and to provide the country with the skilled manpower it needs for development. Unfortunately the Government has the means to finance only very limited expenditures on education. It is therefore important that the planning of the implementation of the reform be based on a realistic estimate of external assistance. Beyond that, much will depend on the willingness and capacity of each community to contribute labor for classroom construction and funds to meet the recurrent costs of the schools.

232. With such a tight resource constraint, it is imperative that the implementation of the educational reform be carefully planned. Assuming limited external assistance, the most rational approach would be to give first priority to achieving the full enrollment of the 8 to 14 year age group in the first cycle of basic education and to strictly limit entry to the second cycle to the projected demand for skilled manpower. Economies may also be achieved in the immediate future by eliminating repetition and by expanding the double shift-system. With stress placed on the relevance of the training, it will be particularly important that a manpower plan be prepared to guide the educational planners in determining the numbers of students to be enrolled in each discipline at the secondary and higher levels, and in establishing target involvements in all the various branches of vocational training. Manpower planning should be one of the priority tasks of the Economic Planning Office 1/.

6. HEALTH SERVICES

233. Comoros has only the most rudimentary medical facilities and, consequently, the population's state of health is poor. The most serious disease is malaria which affects a very large number of people and is a major cause of death. For example, in 1974 alone, a quarter of the entire population was treated for malaria by the health services. Other serious illnesses include tuberculosis, leprosy, venereal disease, gastroenteritis and parasitic diseases. Among the children kwashiorkor is widespread, a symptom of general malnutrition; in particular, the diet is deficient in animal protein. Contaminated water supplies, owing to the dilapidated condition and poor maintenance of public water cisterns, is a major cause of intestinal troubles.

234. Before independence the health services were split in two. The Comorian Government was responsible (with French technical assistance) for running hospitals, clinics and health posts, while the French Government financed directly a basic health service (Service de Sante de Base et des

1/ Commisariat du Plan.

Grandes Endemies - SSBGE) operating mobile units which undertook public health work and ran mass vaccination campaigns. At the end of 1975 France withdrew all its medical personnel, leaving the country's facilities virtually unmanned. In all (excluding Mayotte) the country is served by eight full-time doctors, two of whom are surgeons; three of the doctors are Comorians. Thus, there is approximately one doctor per 40,000 persons, and no dentist. Worse still, there are only 14 fully-trained nurses and nurse-midwives.

235. Each island has a small hospital with a maternity wing and simple equipment, though the facility on Moheli is more accurately described as a health center as it lacks a qualified resident doctor. In addition, Grande Comore has three health centers 1/ and Anjouan, one. In all (excluding Mayotte), there are 555 hospital beds distributed between the three islands as follows:

	<u>Total</u>	<u>No. of Hospital Beds Per '000 of Population</u>
Grande Comore	324	2.0
Anjouan	179	1.5
Moheli	<u>52</u>	<u>4.0</u>
	<u>555</u>	<u>1.9</u>

The rural areas are covered by 45 health posts, each manned by an auxiliary nurse or medical aide.

236. The virtual collapse of the health services is evident from the decline in budgetary allocations. Including French assistance, approximately CFAF 1.5 billion were spent on the health services in 1975, whereas only CFAF 100 million was made available in 1976. As a consequence, the number of patients admitted to hospital has been sharply reduced; buildings, vehicles and equipment are not being properly maintained; and practically no public health services are being provided. WHO has helped to meet the cost of local staff, estimated at CFAF 140 million, and considerable quantities of medicines have been donated by external agencies.

237. The Government recognizes that, given the paucity of budget finance, the few funds that can be made available must be concentrated on preventive health measures and that much lower priority should be accorded to the curative services. With this objective in mind, the medical delivery services are being reorganized with the assistance of a WHO team. Major emphasis is rightly to be placed on the role of the rural health post, which will be

1/ Two of the health centers on Grande Comoros have never opened. After 1977, only the hospitals were operational, but with greatly reduced services.

required to give special attention to maternal and child health care, and will be used as a base for vaccination campaigns and other public health programs. The training of medical personnel will give priority to the training of public health officers, and nurses/medical aides to man the health posts. A training center for paramedical staff has been established at the Moroni Hospital with the object of training 240 staff over a five-year period. WHO scholarships have been provided for the training of sister-tutors and sanitary technicians. To achieve economies in the use of drugs, the government pharmacy has been centralized and prescriptions for specific treatments standardized.

238. To cater to the shortage of doctors, for several years scholarships have been awarded. Some 40 students are currently overseas studying medicine, dentistry and pharmacy, twenty of whom are expected to complete their courses in 1977. It is to be hoped that at least some of these will be persuaded to return to the Comoros, provided funds can be secured to meet the cost of their salaries. A key problem will be to reorient these young doctors trained in French hospitals to adopt attitudes and practices appropriate to Comorian conditions.

239. The running of the health services have largely fallen on the shoulders of the WHO team attached to the Ministry of Health. The team includes two doctors, a public health specialist, a nursing advisor and a sister-tutor. There is an immediate and urgent need for additional external technical assistance and for a continued supply of drugs, as well as for vehicles and new medical equipment. Negotiations are proceeding with the Italian and Canadian Governments for the provision of both medical personnel and drugs.

PART D: PROSPECTS AND EXTERNAL AID NEEDS

1. OUTLOOK FOR DEVELOPMENT

240. The structures and policies existing prior to independence were not conducive to rapid economic and social development, despite being buttressed by considerable aid provided by France. Most important of all, during the past decade practically no progress was made in improving the productivity of the key economic agent--the small farmer. A radical revision of both structures and policies was required to dispel the inertia of the Government and the apathy of the governed. Independence and the subsequent overthrow of the previous regime provided the opportunity for a new initiative. But the Comoros entered independence ill-prepared and ill-equipped. Moreover, the new Government's immediate problems are complicated by the unresolved dispute concerning the status of Mayotte. Also the abrupt withdrawal of French financial and technical aid has had near catastrophic consequences for the economy, only partially and temporarily mitigated by aid obtained from other sources.

241. Despite the formidable financial and manpower crisis which confronted the country's leaders after the unilateral declaration of independence, the Government immediately started to tackle the fundamental issues. The major reorganization of the Administration which is now in full swing was essential in order to tailor the core of government operations to available domestic resources. The decentralization of the Administration was necessary to encourage local initiative and to mobilize the rural population for the improvement of village life through self-help. With a growing body of virtually landless peasants, the breakup of the company estates was inevitable and since company land is mainly planted with tree crops, productivity may actually increase with the land under smallholder management, provided the trees are not uprooted and replaced by food crops. A complete reorientation of the educational system was required if young people were to be provided with knowledge and skills relevant to the development of the country. The new approach to health care which has been adopted, with priority being given to preventive medicine, is the only way to ensure that the limited budgetary resources available for health services are optimally deployed.

242. The present poverty of the Comoros, the disruption caused by the French withdrawal and the drastic nature of the current administrative reforms may easily create an excessively pessimistic impression of the islands' development prospects. It is true that the GDP per capita fell sharply in 1976 and will decline further during 1977, but recent events have had only a marginal impact on the standard of living of the vast majority of the population--that is, the rural peasants. Once completed, the reforms should provide a sounder basis for sustained development than existed previously, with benefits being more widely distributed than in the past.

243. Although the archipelago is poorly endowed with natural resources, there is nevertheless significant scope for the expansion of both cash and food crop production, for the development of fisheries and small livestock, and for the establishment of small processing industries. Provided particular attention is given to skilled manpower training and if the Government succeeds in securing a level of aid from the outside world at least comparable to that provided by France alone prior to independence, the present downward trends in the economy should be quickly reversed and a steady improvement in GDP should then be possible. Yet, despite this optimistic assessment of the country's prospects for the medium-term, there are some troublesome shadows on the horizon.

244. Such is the magnitude of the immediate budgetary and administrative problems and the preoccupation of the Government with institutional reform that it has not been possible for the leadership to give adequate attention to solving certain long-term key development issues. Yet confrontation of these issues should not be long delayed, since trends are already evident which, if left unchecked, will lead to calamity. The underlying phenomenon giving rise to this concern is the growing population pressure on the land and the consequential degradation of the islands' agricultural and forestry resources--the islands' only resources--exacerbating rural poverty and giving rise to fast growing unemployment. The need to elaborate policies and programs to tackle these issues is examined below.

2. SOME KEY DEVELOPMENT ISSUES

Explosive Population Growth: Need for a Population Policy

245. The islands are already overcrowded relative to their natural resource endowment. The population problem has become increasingly acute over the past decade as the rate of growth has accelerated. How fast then is the population likely to grow in future? The answer to this question depends partly on the policies adopted by the Government and partly on the present age and sex structure of the population. Even if fertility rates were to decline, the crude birth rate could well remain high owing to the fact that the absolute number of fertile women is rapidly increasing, reflecting the relatively high proportion of young people in the population. If fertility rates remain high and mortality rates continue their long-term downward trend, the situation could become explosive.

246. The 1966 census report indicates that whereas the average fertility rate for the archipelago was 148 per thousand for women aged 15 to 49, this rate varied between islands as follows:

	<u>Births per 1000</u>
Grande Comore	126
Anjouan	157
Mayotte	205
Moheli	157

The high average fertility is a result of two factors. First, it is a feature of Comorian society that an exceptional large proportion of women are married. Second, there is no organized program of family planning. The high fertility evident in Mayotte is mainly explained by a tendency towards earlier marriage on that island; as a consequence the fertility rate of women aged 15 to 19 is 209 per thousand on Mayotte compared to 60 per thousand on Grande Comore and 72 per thousand on Anjouan.

247. Another social factor influencing fertility is the widespread existence of polygamy. Not surprisingly the older the age of the husband, the more wives he has; the ratio declines only for men over 70. Whereas only 6 percent of husbands under 30 years of age are polygamous, approximately 30 percent of those over 40 have more than one wife. It has been observed that women married polygamously are generally less fertile than women who contract monogamous marriages, though it is not well established to what extent this phenomenon may be due to the different age structure of the two groups.

248. Looking to the future, various opposing trends may be expected. On the one hand, fertility may tend to decline as the expansion of educational opportunities encourages later marriage, although this effect is likely to be most marked in Mayotte. With the gradual emancipation of women, the percentage of polygamous marriages will probably fall and fertility may tend to rise. Higher fertility may also be expected to result from better nutrition and health care. However, all these factors are likely to be relatively minor in comparison to the impact which could come from a well-organized official program of family planning. If fertility remains at the present high rate and mortality continues to decline gradually in response to improving public health programs, the population of the archipelago is projected to exceed 400,000 in 1980, to grow to 560,000 by 1990 and to reach 800,000 by the year 2000.

249. The Government has no declared population policy and Comoros has no program to facilitate family planning. Recent experience in Mauritius provides a good example of what can be achieved with a determined population policy. Twenty years ago, Mauritius was faced with a similarly critical problem. By establishing a country-wide network of maternal and child health clinics providing pre- and post-natal care, combined with family planning services, the population's health has been markedly improved and the birth rate has fallen from nearly 50 per thousand in 1950 to 25 per thousand in 1975. As a result the Government is now able to plan for full employment by the early 1980s and may concentrate financial resources on improving educational and other services, rather than continually expanding expenditure in order to maintain minimal services. It cannot be expected that the impact of a family planning program will be as dramatic in the Comoros as it has been in Mauritius, since the social situation is different. While Mauritius had a highly literate population with incomes derived almost entirely from within the monetized economy, the bulk of Comorians are subsistence farmers who perceive a large family as providing

very real economic benefits. Nonetheless, there is undoubtedly a proportion of the population who would choose to have smaller families and space their children, if only the means were made available.

Rural Development

250. The population mostly live in villages, and the annual increment must be largely absorbed by the rural areas. The present Government places great stress on rural development. Indeed, the reform of the administrative structure may be seen as laying the institutional foundations for the implementation of a set of comprehensive measures to improve living standards in the villages. The approach adopted towards the agriculture sector is two-pronged. First, every effort is to be made to reduce dependence on food imports by expanding the production of food crops, fish and meat obtained from small stock such as rabbits and poultry. A number of specific measures have been identified. Second, it is recognized that cash crops provide the only source of foreign exchange and that there are no alternative sources immediately in sight. Therefore, urgent steps should be taken to improve the productivity of cash crop cultivation. Among these are the schemes mentioned earlier for subsidized distribution of seedlings, the eradication of rodents and the provision of seasonal credit for inputs.

251. The Government is already planning the implementation of some of these measures. A large number of simple tools have been bought using a credit recently negotiated with People's Republic of China. A proposal has been elaborated to establish local markets and refrigerators have been ordered to facilitate local storage of fish and agricultural products. The construction of small fishing boats has been commissioned. Agriculture is being introduced as a major subject in the school curriculum. The need now is to coordinate and focus these and other initiatives to ensure that each reinforces the other.

252. Consideration should be given to planning a major program for the integrated development of certain selected areas, combining an agricultural extension effort with labor-intensive feeder road construction (using voluntary labor encouraged by food aid) and properly organized arrangements for the supply of agricultural inputs, marketing and credit. At the same time steps should be taken to develop alternative sources of revenue such as craft industries, and to provide basic health services with an accent on preventive measures, simple nutrition training, maternal and child care, and family planning. The relevant elements of the proposed forestry and fisheries projects would be integrated into the program. Since staff and finance are limited, it would be wise to start with a pilot project. Initially, it might be reasonable to concentrate the Government's efforts in the Nioumakele peninsula of Anjouan, which is the most disadvantaged area

in the whole archipelago, especially as many studies already exist 1/ on which to base project preparation.

Diversification

253. While it is true that many opportunities exist for expanding agricultural production, it is not plausible to suppose that the agricultural sector can provide full employment for the rapidly expanding labor force. Since the possibilities for tourism development are also limited, consideration must be given to job creation in export manufacturing. The few projects which have so far been identified are sufficient to enable a start to be made in expanding industrial activities in the immediate future, but much more work is required to elaborate a long-term program for industrial development. A possible model here is, once again, Mauritius which over the past five years established a successful export processing zone. This has not depended on the availability of large numbers of trained artisans; on the contrary, most of the new jobs are unskilled and semi-skilled, with the bulk of the training being acquired on the job. The essence of the scheme has been to provide a secure tax haven for footloose industries in a place where there is a good supply of labor at internationally competitive wages and the minimum of bureaucratic constraints. Although Comoros' poor transport links are a handicap, advantage could be taken of the new international airport for air freight. This means concentrating on the production of low weight, high value products such as garments. The first step would be to undertake a feasibility study to identify more clearly the possibilities for such a scheme.

3. THE ROLE OF EXTERNAL ASSISTANCE

254. The dismantling of the unviable structures inherited from the colonial regime must be regarded as a prerequisite for the accelerated development of the Comoros, but the Government's bold program of reform entails major risks. The greater the changes, the more urgent it becomes to achieve swift results to convince the ordinary citizen that the inevitable initial sacrifices and disruption are justified. Because the Government lacks financial and manpower resources to implement the reforms, the risks are magnified. Hence, the urgent need is for substantial external aid--for budget grants, project-tied loans and technical assistance.

1/ See, for example, (1) Etude de l'Amenagement de la Presqu'ile de Nioumakélé, BDPA (1971).

(2) Etude de Identification du Projet de Developpement Economique Integre du Nioumakélé, D. Dumont (1974).

(3) Anjouan: Inventaire des Terres Cultivables et de leurs Aptitudes Culturelles, M. Brouwers (1975).

(4) Etude des Besoins en Matiere de Formation Exprime par les Femmes de Nioumakélé, S. Ramanonjisoa (1976).

255. Domestic government revenue is projected to fall to CFAF 1.2 billion in 1977; it is estimated that at least another CFAF 2.5 billion (US\$10 million) is required in budgetary aid to run minimum services and provide an administrative and planning capacity to formulate and implement a modest investment program. In addition technical assistance will be required, including some 200 secondary school teachers and at least 150 other professional and technical personnel. The exact needs for technical assistance have not been assessed, but specialists are required in almost every field--engineers, agronomists, planners, economists, doctors, nurses, vocational training instructors, architects, mechanics, electricians, draughtsmen, and so on. This level of budgetary and technical assistance will need to be maintained over a number of years and should only be gradually phased out. A reasonable target might be to achieve budgetary self-sufficiency over a 10- to 15-year period. It is vital that Comoros obtains not simply immediate emergency assistance, but also a reliable commitment from donors for the long-term.

256. Since Comoros is unable to balance its recurrent budget at a level permitting the mounting of an investment program which would ensure that real GDP grows faster than population, no domestic public savings can be expected. Thus, development projects must be fully funded by external agencies. A very high proportion of investment expenditure is foreign costs, and salary earners have a high propensity to import. For this reason, the resource gap is likely to grow in step with investment.

257. In the last five years of colonial rule, public investment averaged about US\$4 million annually, equivalent to approximately US\$13 per capita as compared, for example, to US\$20 per capita in Malawi and Tanzania. It is suggested that a reasonable target for the Comoros, taking into account its poverty, smallness and lack of resources, is to seek a level of external aid which would enable about US\$10 million to be invested in 1978, rising to US\$16 million in 1980. This would be equivalent to about US\$23 per capita in 1978 and US\$29 million in 1980, or approximately 20 percent of GDP, a level which is estimated to be necessary if the Comoros is to grow by 5 percent per annum ^{1/}. Prior to independence the bulk of external finance was in the form of grants. As at end of 1976 disbursed public debt amounted to only US\$17 millions; another US\$15 million remained undisbursed. Debt service amounted to 5 percent of export earnings in 1976. Despite this low level of debt, external assistance should be largely in the form of grants or highly concessional loans; if not, Comoros public debt would rapidly become an intolerable burden, which could only be serviced through external budgetary grants.

258. The investment program should give highest priority to projects which contribute directly to increasing production and foreign exchange earnings. This implies, for the immediate future, a concentrated effort to raise agricultural output, promoting small livestock production as well

^{1/} This assumes an ICOR of 6 and private investment growing from US\$2 million in 1978 to US\$7 million in 1980.

as both food and export crops. As already emphasized above, considerable scope exists for increasing the productivity of farming activities. Close attention must also be paid to the need to protect the land with measures limiting erosion and encouraging reforestation. Investment in improving road communications embraces not only the completion of a basic network of paved main roads, but the construction of simple feeder roads should also be considered as an integral part of the proposed program of rural development. Another program closely related to the central objective of increasing production is the reorientation of the educational system to give much greater emphasis to practical and vocational training. Lastly, mention should be made of projects for processing agricultural produce, such as the extraction of coconut oil, the preparation of vanilla essence and the improved distillation of essential oils.

ANNEX I

THE DEVELOPMENT

OF TRANSPORT

THE DEVELOPMENT OF TRANSPORT

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THE TRANSPORT SYSTEM 1/

A. Ports and Sea Transport

Ship Fleet

1. About 10-12 coasters 2/ of 300-500 ton capacity work for Comoros at any time. In addition, 50-60 dhows 3/ of 5-3 ton capacity operate for lighterage and interisland traffic; a 60-ton LCT (Tritonis 4/) carries a large proportion of Moheli's traffic. Two small tankers supply petroleum products from Madagascar. Only occasionally do larger ships call at Comoros, mainly to bring goods such as cement from Kenya or rice from the Far East.

2. The Government owns the Tritonis, a 400-ton ship (Moinantsi), and a number of dhows. It has recently bought a 400-ton LCT, to replace one that went out of use in 1976, and 15 small fishing boats, probably to be operated by fishermen's cooperatives which are to be set up. The Government also has a 20 percent participation in the Societe Comorienne de Navigation (a subsidiary of Compagnie la Havraise of France) that owns the 500-ton El Mabruk operating between La Reunion, Mombasa and Majunga. This company also operates the Moinantsi. The dhows are in general owned privately by Comorians. Other ships serving the Comoros are foreign owned: five 250-400-ton ships of the Compagnie Malgache de Cabotage ensure transshipment between Majunga-Comoros and a 450-ton ship, privately owned by a Malagasy, supplies cement from Mombasa.

Existing Port Facilities

Grande Comore

3. The Port of Moroni originally consisted of a small quay (100 m x 15 m) located in a natural cove on the shoreline. The quay provided some protection from the weather, and was designed to accommodate only small dhows of 5-20 ton capacity. With an annual tidal range of from 2.5 to 4.0 mm, this original port area is above water at low tide. A second and now principal quay (150 m x 15 m) was later constructed nearby in deeper water in a less sheltered location. The landward side of this quay has a maximum depth at low tide of 3.5 m and can accommodate small coasters of 300-400 tons, 60-80 length and 2-3.5 draft. Any larger vessel must anchor offshore and be loaded

1/ This annex does not cover Mayotte.

2/ Caboteurs.

3/ Boutres.

4/ Which has side tanks to carry petroleum and a ramped central cargo compartment which can accommodate vehicles.

or unloaded using dhows. During calm weather dhows can be worked on the offshore side. Some vessels exceeding 3.5 m draft are berthed at high tide and rest on the bottom during low tide. This quay is not protected on the seaward side, and is subject to overtopping during some periods of high tide in conjunction with strong off-shore winds. There is a loading ramp within the harbor for use of craft with bow ramps. The anchorage for ships worked by dhows is in deep water about 400 meters from the quay.

4. Other facilities in the port area include a total of about 3,342 m² of warehouse capacity, 683 m² for open storage, and 2,911 m³ for petroleum products storage 1/. Equipment in the port area includes 2 mobile cranes (10/15 tons), 3 tractors, 4 trailers (10/15 tons) and 1 small (45 hp) tug. Petroleum products are discharged through a portable floating pipeline.

Anjouan

5. The port of Mutsumudu was built about 30 years ago with a jetty 80 m long by 8 m wide, perpendicular to the shoreline. In 1965-67 this jetty was extended 170 m, with a 60-degree change in direction, utilizing 25-30 ton concrete blocks, protected on the seaward side by 6-ton terrapods. Depths on the inshore side at low tide range from 7 m at the end of the extension to 4 m at the outer end of the original jetty. During low tide the bottom at the shoreward end of the original jetty is above water. The outer quay can berth simultaneously a coaster of approximately 600 tons and another of 300-400 tons, as well as dhows at the old quay. Larger ships must anchor and be loaded and unloaded using dhows.

6. Other facilities in the port area include about 1,883 m² of warehouse capacity, a 2,464 m² transit shed and 917 m² of open storage. Equipment in the port area includes 2 mobile cranes (10/15 tons), one fork lift, 2 tractors and 3 trailers. 1,593 m³ storage for petroleum products are available outside the port area. 1/

Moheli

7. The "Port" of Fomboni is a misnomer. There is a jetty (70 m x 4.5 m) situated perpendicular to the shoreline at the center of the village; however, it is not used. The berth is high and dry at low tide, and is too exposed to weather for mooring during high tides, in conjunction with any appreciable winds, when the depth is a maximum of 2 meters. Accordingly, all traffic for Moheli passes over the beach, an operation which is facilitated by the shallow gradient. Craft are beached at high tide, unloaded and loaded at low tide, and depart at high tide. All cargo handling equipment, warehousing, and the pipeline connection to a 13 m³ petroleum storage tank are privately owned.

<u>1/</u>	Autogas	-	275 m ³ .
	Kerosene	-	320 m ³ .
	Diesel	-	1,000 m ³ .

Organization for Port Activities

8. There is no central authority; responsibilities are divided among several ministries and agencies as follows:

Port Captain <u>1/</u>	-	Ministry of Public Works
Police	-	Ministry of Interior
Customs	-	Ministry of Finance
Stevedoring and Cargo Handling Equipment & Operations	-	Societe Maritime <u>2/</u>
Storage Warehousing	-	National Office of Commerce
Cargo Handling Charges	-	Assessed by Societe Maritime
Quay Usage Charges	-	Assessed by Customs
Maintenance of Navi- gation Aids	-	Port Captain
Pilotage	-	None
Tug Operation	-	None
Assignment of Berthing	-	Port Captain
Policing of Shipping and Licensing	-	Ministry of Transport & Maritime Affairs

Although the system operates quite informally, it is adequate to handle existing traffic volumes.

1/ For Moroni, and Mutsamudu as a sub-port. There is no Port Captain for Moheli.

2/ Formerly a privately enterprise, but now nationalized and under the National Office of Commerce. There is some question as to the degree of autonomy of this latter office. It may be controlled by the Ministry of Finance.

Cargo Handling

9. Working hours at Moroni and Mutsamudu ports are from 07.00 to 17.00 hours, seven days per week, as required. In lighterage operations utilizing dhows, stevedores would handle 500 tons of bagged cargo, or 250 tons of general cargo, per day, assuming a four hold ship is being worked. At quayside, about 400 tons of bagged cargo, or 200 tons of general cargo, can be handled per day, considering the coasters usually have 2 holds, each worked by a stevedore gang. Cargo unloaded at quayside is placed directly on trailers or trucks for movement to the customs area. Cargo handling is labor-intensive as such a method costs less than one tenth that of using cranes. Cargo handling and port fares average about 3 percent of import, cif prices, but are as much as 100 percent of the value fob of some exports (e.g. vanilla). Unit tariffs are shown in the Statistical Annex, Table 8. At Fomboni cargo is handled by shippers and/or receivers.

Port Capacity

10. Moroni port handles an average of 230 ships per year, 45-50 percent of which are engaged in interisland traffic. Mutsamudu port is the most important, having handled up to 360 ships in one year; 75 percent of the traffic represents interisland movements. 1975 and 1976 show a reduction in traffic of almost 30 percent.

11. The number of calls means that, on average, not more than one ship needs to be handled per day. The unloading/loading operation does not exceed one day for international ships (averaging 300 tons), and is only 2-3 hours for a dhow. Moroni can handle only one ship at a time at quayside, but Mutsamudu has sufficient capacity for two. In addition, the lighterage operation is independent and does not compete with quay operations for quay space, stevedores and handling equipment. About one third of the traffic is petroleum products which are handled through marine terminals. Considering only the present 10 working hours per day and traffic volume, the port utilization rate is about 35 percent. ^{1/} And in fact, ships rarely queue because the berth is occupied by another. Waiting time is due rather to adverse weather, the hours the port is non-operational, and limitations imposed by tides.

12. It would be possible to double the amount of cargo handled within the present system, and to further increase capacity when required, by resorting to a second shift in port operations. This leads to the conclusion that costly investment in expanding the quay capacity at either Moroni or Mutsamudu is not warranted at present. In Fomboni about 200 dhows call, handling around 4,000 tons per year. This small amount of traffic does not seem to justify the construction of a port.

^{1/} If the posts were operated 24 hours a day, the utilization rate would drop to 20 percent. This may, however, not be possible because of tide limitations.

Traffic Patterns

13. The annual volume of Comoros' international trade is in the order of 50,000 tons of imports and 10,000 tons of exports handled at Moroni and Mutsamudu. 1/ In addition, 15-20 percent of the exports and imports are transshipped interisland. As long carriers cannot call at the Comoros, about 40 percent of all imports/exports, or about 25,000 tons per year, are transshipped through Majunga, which is about 500 km from Mutsamudu. Aside from its proximity, its use as the principal trans-shipment port is a carryover from the days when both Madagascar and the Comoros were French colonies. As a consequence of this long standing arrangement, shipping to support the Comoros is still largely operated by interests in Madagascar. Majunga is a lighterage port for deep draft ships, and four international shipping companies 2/ have established regular lines to it. Coasters serving the Comoros load and unload at Majunga's quayside.

14. Petroleum products are transshipped at Tamatave and carried by two small tankers owned by Shell; recently, such products, which account for 20 percent of the traffic, are also being brought from Mombasa, about 900 km away. Some traffic is transshipped at Dar es Salaam (650 km from Comoros); Nacala, only about 500 km away, is not used because historically Comorians have not had any commercial relations with Mozambique.

15. About half the freight comes in bags, 20 percent is liquid (petroleum products) and 30 percent is general cargo. 3/ There are no scheduled connections. Some representative sea freight rates are shown in Table 8.4 of the Statistical Appendix; on average they are only 6 percent of corresponding air fares.

16. Passengers are also carried by the cargo vessels at half the air fares. But only about 3,000 persons per year travel by ship (or 15 percent of passenger movements) as the inconvenience of having no schedules and no passenger facilities deter traveling. Apparently Government intends to buy a passenger vessel to satisfy interisland needs, which are estimated to be much higher than present effective demand. This would reduce costs and enable the DC4 air craft to serve other purposes or routes.

B. Airports and Civil Aviation

Airport facilities

17. The Grande Comore has two airfields. Iconi, the oldest one, located at the southern end of Moroni, has a 1,500 m paved runway that can handle

1/ For further details on external trade, see Chapter 3 of Part B of the main report.

2/ The 4 international lines are: Compagnie La Havraise (French), Compagnie des Messageries Maritimes (French), Scandinavian Lines (Norway), and Hansa Lines (Germany).

3/ See Statistical Appendix, Table 8.3.

Boeing 737 aircraft, although the runway is too short to allow them to take off fully loaded. It has satisfactory terminal buildings. By mid 1975, an international airport with a 2,800 m runway accommodating Boeing 747s had almost been completed at Hahaia about 18 km north of Moroni. The installation of equipment was interrupted when the French left Comoros, and the airfield has not yet been officially opened. Even so, it handles a weekly Air France flight. After its completion, the runway started settling along 300 m in the center; although repairs have been carried out, it is not yet clear whether further major works will be required because of the instability of the underlying rock structure. Since the contractors went bankrupt, it has not been possible for the Comorian Government to have the repairs made under the terms of the contractors' guarantee. Although a terminal building has been constructed, more equipment is still needed. The Government hopes that the high frequency radio required will be provided by ASECNA 1/, and other missing safety and electrical aeronautical aids, by ICAO. 2/ When this equipment is installed, the airport can be opened officially to international traffic. It could handle all of Grande Comore's air traffic and the Iconi airport could then be closed to avoid duplicate overhead costs and technical personnel.

18. Anjouan has an airport at Ouani near Mutsamudu, comprising a 1,400 m long, 25 m wide, paved runway that can handle Boeing 737 aircraft and a terminal building with a control tower. At Moheli, a 1,200 m long, 25 m wide paved runway is located south of Fomboni, but it has no terminal facilities.

19. The airports are operated and maintained by staff of the Ministry of Air Transport, Telecommunications and Maritime Affairs. Shortage of staff has, however, become a problem since the departure of 15 French civil aviation specialists in December 1975, and additional staff is definitely needed if the Hahaya airport is to be operated fully. Passengers leaving for international travel pay an airport tax of CFAF 1,500.

Air Comores

20. Air Comores was a private company formed at the beginning of the 1960s. Since March 1975 it has been owned 51 percent by Air France, and 49 percent by the Comorian State. It operates two DC4s, one fully owned and one leased from Air France; a third DC4 has recently been bought.

21. Before independence Air Comores was a profitable enterprise. Even in 1975, with reduced traffic after independence, it produced a small profit. In 1976, however, receipts decreased by about one third and the company registered a loss. At present, the company is just breaking even, as fares have not been fully adjusted to take account of rising costs. The Government intends to merge Air Comores and the Societe Comorienne de Navigation, in order to coordinate better interisland air and boat traffic.

1/ West African Civil Aviation Organization.

2/ International Civil Aviation Organization.

Air Traffic Patterns

22. Interisland air services are especially important for the transport of passengers. Despite tariffs being double the shipping tariffs, 1/ about 85 percent of passenger traffic is carried by air, which indicates the inadequacy of available shipping services. In 1975, 15,964 passengers were carried between the islands by air. On the contrary, interisland air cargo is less than 5 percent of the total, amounting to only 181 tons in 1975. 2/ This reflects the high air freight costs, which are about 15 times those by ship. Air traffic is handled by the two DC4 aircraft owned by Air Comores. In addition, a few smaller, privately-owned planes are operated.

23. Air Comores' DC4 aircraft make regular weekly flights to Tananarive, Mombasa and Dar es Salaam. Other international air services include two weekly Air Madagascar Boeing 737 flights from Tananarive to Dar es Salaam and a weekly Air France Boeing 707 flight to and from Paris. In 1974, 720 tons were imported (1.3 percent of total imports) and 1,369 tons were exported (30 percent of total exports) by air, but since independence air freight traffic has declined. Meat and vegetables are the main imports by air, which is the only means of receiving perishable products. Also high value, low weight exports, such as perfume essences and vanilla, can bear air fares. No statistics are available on international passengers, but in any event past trends would no longer be meaningful.

C. Roads and Road Transport

Road Network

24. The rugged topography makes road development difficult and costly. The first bitumen roads were constructed in the early 1960s, and by 1970 Comoros possessed 105 km of paved road; 62 km of the western coastal road on Grande Comore; 40 km in Anjouan, linking the port of Mutsamudu to Domoni; and 3 km in Moheli. The length of paved road was doubled between 1970 to 1972, when construction of a comprehensive network of all-weather main roads began. At independence, the French administration road program was interrupted as financing was stopped; after a period of uncertainty, the new Comorian Government secured a loan from the Kuwait Fund which permitted resumption of works in 1976. By the end of 1977, 112 km of new paved roads will have been completed: 76.5 km on Grande Comore, extending the coastal road on the eastern side and providing a link across the middle of the island; 22 km on Anjouan, following the southwest coast; and 13.5 km on

1/ For instance, one-way fare between Moroni and Anjouan is CFAF 2,600 by ship or CFAF 5,200 by air.

2/ See Statistical Appendix, Tables 8.5 and 8.6.

Moheli, continuing the coastal road in the southwest. Total network (excluding Mayotte) will then comprise 351 km of paved roads and 286 km of mainly dry weather, earth roads. 1/ Road density is 347 m/km², which compares with 54 in Madagascar, or 90 in Lesotho. Taking population into account, on average one km of road directly serves 420 inhabitants in Comoros, 260 in Madagascar and 404 in Lesotho.

25. Road standards are low. Paved roads mostly followed a previously existing earth road, with no geometric improvement. Gradients higher than 10° and more than 10 curves per km are common; roadway width is less than 8 m including shoulders, the pavement width varying between 3.5 m and 5.0 m. The paved roads can take up to a 5.5 ton axle-load, which is adequate for the vehicle types used in Comoros. In addition to the network mentioned, there are a number of unclassified tracks built by self-help labor. The World Food Program is assisting the construction of such tracks, by providing food for 1,000 workers in Grande Comore and for 500 in Anjouan.

Road Administration 2/

26. The Department of Public Works (Direction de l'Aménagement du Territoire, DAT) of the Ministry of Public Works and Energy, is responsible for main road construction and maintenance, with one subdivision on each island. The DAT is also responsible for public building construction and hydraulic works. The moudirias (communes) are responsible for opening up and maintaining feeder roads.

27. DAT's staff is very limited both in number and qualifications, and has to work on all types of DAT activities. Most of the staff are assigned to work on public buildings. Executive staff consists of technicians, or high school graduates with 2-year training in engineering at university level. DAT's headquarters has one Chief Engineer, one Technical Assistant, 2 Accountants and 10 Technicians; in the 2 subdivisions are 3 Directors, 3 Assistants, 2 work supervisors and 20 gang leaders. The organization chart calls for considerably more technical staff; vacancies left by the departed French technical assistance have not been filled and staff shortages are a severe constraint to DAT activities.

1/ If Mayotte is included, the network length is 776 km. See Statistical Annex, Table 8.7.

2/ The situation described in this section is that existing in March 1977; it is not known to what extent the governmental reorganization initiated in April has affected the DAT.

28. The DAT has no planning capacity. Road priorities are determined by an Infrastructure Committee, which decides on all modes (see para. 50). For road design DAT relies on consultants. Over the last 5 years BCEOM and SECMO, both French consultants, have undertaken all road designs; SECMO still has an office in Comoros. The main design objective is maximum economy; alignments follow established tracks to take advantage of the existing earthworks and structures. Structures are limited to concrete pipes and box culverts, though for the more important crossing typical concrete bridges are used, with spans ranging from 4 to 7 m. Pavements normally consist of double surface treatment on a 10-15 cm penetration granular base.

29. The DAT has no capacity to undertake road construction or even road improvements, not only because of staff problems, but also because of lack of equipment. The subdivisions have practically only scrap machinery, only a few of which are repairable. There is no materials/soil laboratory. Construction is, therefore, carried out by contractors and supervised by DAT with technical assistance from consultants. There are no established procedures for the award of contracts except for those of the colonial administration which are still in practice.

30. Paved roads are generally in good condition; little need for maintenance works has arisen because of low traffic volumes, comprising mostly light vehicles, good soil-bearing capacity and good drainage on volcanic soils. Maintenance of paved roads is virtually limited to the use of a special sprayer truck which carries aggregate and hot bitumen, supported by a truck carrying materials and laborers. There is only one sprayer, frequently under repair, in Grande Comore, and another one has been ordered for Anjouan. For the aggregates, the DAT has a 10 m³/hr crushing plant near Moroni, which is not working as required spare parts ordered almost a year ago have still not arrived. Two other plants of 15 m³/hr were recently delivered and will be put in operation, one in Grande Comore and one in Anjouan. In the meantime, aggregate is bought as required from contractors.

31. Earth roads, which require constant maintenance, are generally in poor condition. Maintenance is done by hand. Villagers are recruited to form a gang under the directions of a leader ("animateur"), sent by DAT or appointed locally. Works consist of patching uneven or rocky surfaces with soil or gravel; as soon as it rains, however, the benefits of this maintenance effort are lost. Laborers have almost no tools (they may even use pieces of coconut trees), and only recently was a supply of shovels, picks, wheelbarrows and other tools received, some of which are being distributed to the moudirias. In addition, the Kuwait Fund has approved a list of maintenance equipment, which is being procured. Current expenditures on maintenance bear no relation to needs.

Contractors

32. French companies, through their Malagasy branches, have undertaken the construction of the existing paved roads; there are no local contractors. Over the last ten years, three groups have been engaged in Comores: Compagnie Francaise d'Entreprise, which went bankrupt and left after completion of the Hahaia airport; Grands Travaux de l'Est (GTE), which is still working on Grande Comore; and Societe Nationale de Travaux Publics, which is completing a road in Anjouan, in a joint venture with SPI-Batignolles. GTE is expected to complete its contract by November 1977. Contracts are based on unit prices and include a price escalation formula for revisions. There are no limitations on remittances abroad. The foreign exchange component in road construction costs is high, as all equipment and materials (except wood) and all personnel (except unskilled labor) have to come from abroad. Delivery delays are considerable, and not even basic materials such as fuel, lubricants, cement and iron are always available. Equipment is imported free of duty on a temporary basis. Lastly, the small size of contracts give rise to relatively high mobilization costs. Average paved road construction costs at 1977 prices, according to ongoing works, are about 30 million CFAF/km (US\$120,000) on rolling terrain, and 40-50 million CFAF/km (US\$160,000-200,000) on mountainous terrain.

Vehicle Fleet

33. The size of the vehicle fleet is not known, but adequate records are kept of new registrations. Until 1970 less than 200 new vehicles were imported annually; the number reached a maximum of 388 in 1973. Most vehicles are French; but recently, both following independence and because of considerably lower prices, Japanese vehicles are in increasing demand. About 30 percent of the vehicles are Renault 4s, 60 percent are medium-size cars and one-ton pick-ups (especially Peugeot), and only 10 percent are trucks, mostly in the 3.5-5 ton range, but with a few larger units. There are no buses.

34. Based on new registrations and assuming an average vehicle life of five years, it is estimated that the fleet consisted of about 1,550 vehicles in 1975. More than 80 percent of the fleet is used in Grande Comore, 15 percent in Anjouan, and only 2 percent in Moheli. This distribution results in about 120 persons per vehicle in Grande Comore, but at least 500 in the other islands. On average, the motorization rate is about 200 persons/vehicle (compared to 135 in Madagascar or 200 in Lesotho).

35. The fleet appears to have been increasing by about 10 percent annually since 1970. This estimate is corroborated by gasoline consumption figures, which average an 11 percent growth per annum. Vehicle statistics are shown in the Statistical Annex, Table 8.8. All vehicles are sold by two dealers established in Moroni.

Regulations, Fares and Services

36. There is no quantitative restrictions on the importation of vehicles or spares, but a minimum of 32 percent is charged in the form of various taxes and duties. Thereafter, annual vehicle licenses are required. 1/ Vehicles for hire have to undergo an examination every 3 months, to determine their road worthiness. Duties and taxes are shown in the Statistical Annex, Table 8.9.

37. Passenger fares are prescribed per itinerary by the Ministry of Works, in collaboration with the various regional administrations, and vary from island to island. The 1974 rates still apply, since 1974 applications for an increase made by transporters have been denied in an attempt to hold down prices. Rate fixing is based on the length and type of road on the section, general expenses, and on occupancy: 17 passengers per vehicle is assumed in the case of a medium-sized vehicle. This means that as soon as a road is improved, transport savings are passed on to users. However, if the rates are not adjusted for inflation, the supply of services will soon decrease, as transporters will not be able or willing to replace worn-out vehicles. Some tariffs are shown in the Statistical Annex, Table 8.10. There is no official tariff for freight.

38. The Comoros road transport services are similar to those in Madagascar. In the cities, Renault 4s are operated as group taxis carrying up to 4 passengers. The fare is CFAF 50 per trip. For longer trips on the main routes one-ton pick-up vehicles carry either passengers, up to 17 at the time, or freight; only a few larger trucks are operated for hire. Fares are different on each island, partly reflecting differences in road conditions. Passenger/km rates average CFAF 3 and 5 on paved roads in Grande Comore and Anjouan, respectively, and CFAF 5 and 10 on earth roads. For small loads, 20 kgs are generally charged as equivalent to one passenger, and larger loads, at the rate of CFAF 60 per ton/km on paved roads and CFAF 150 on earth roads. Despite the tariff freeze, as of 1977 fares still appear to cover estimated vehicle operating costs and have a small margin for profit.

39. Transport services are provided on a regular basis on all-weather roads only, and traffic on them has grown fast. On the paved roads nearing Moroni about 250 vehicles per day circulate, while on sections which are further away the flows are lower. The larger vehicles are generally owned by the Government, or by contractors and traders for their own use.

40. Gasoline stations exist only in the capitals of the islands. Repair facilities are poor, except those of one of the vehicle dealers in Moroni, which is somewhat better organized, has a stock of spare parts, and employs trained mechanics.

1/ The licenses data are not statistically compiled, but this would give a better fleet estimate.

3. GOVERNMENT TRANSPORT POLICY AND IMPLEMENTATION

A. Policy

41. Since the Comoros has been independent for less than two years and has few qualified staff, it is not surprising that no transport policy documents are available. Nonetheless basic policy and objectives have been outlined and all officials agree on the approach. The objectives, however, are mainly in the form of goals rather than practical short-term possibilities. The situation could scarcely be otherwise, since the economic implications of alternative plans have not been studied, planning capacity is lacking domestic resources are very limited and possible foreign financial assistance is unknown. Ideas are also unclear concerning timing and priorities between modes: for instance port development is seen as satisfying the needs for international transport, while road development is to meet internal needs, yet both needs are seen as independent. Although completing the road network is important, it can be developed gradually and partly with local resources. However, the construction of a port requires the full financing at one time, and because of its size, the funds must come from an external source.

42. Transport is recognized by Government as a priority sector, vital because of the international traffic on which the Comores is so dependent; vital for the development of the rural areas where most of the population live. As far as possible, the Government aims at the parallel development of all the islands. As far as ports are concerned, priority is given to the construction of a deep berth for the port of Anjouan, to provide the archipelago with more dependable international shipping links; also a small port is planned for Moheli. The development of the road network is of equal priority, but less importance is attached to completing existing airports. Where sub-sectors overlap as, for example, in the case of interisland sea and air traffic, coordinated action is already taken or proposed. To optimize benefits from the Mahaia international airport, the Government is currently seeking expert legal and commercial advice to help negotiate the best terms and highest number of contracts for traffic rights with international air companies.

Future Port Development

43. Government's main objectives for port development are the provision of a deep draft berth at Mutsamudu (Anjouan) and a berth for 300-4000 ton coasters at Fomboni (Moheli), following proposals made by consultants. 1/

43. The justification for the proposed port developments is based on a number of important considerations. Transshipment results in delays, inconvenience and in serious loss from pilfering and mishandling. Moreover, being tied to Majunga for transshipments restricts Comoros commercially to Madagascar's trading partners and to dependence on the shipping links established between Madagascar and the rest of the world. The Government believes that if they obtained transshipment facilities at other alternative ports, such as Mombasa or Dar es Salam, the Comoros would still suffer from many of the problems encountered with Majunga.

44. The construction of a deep berth in Anjouan to handle large ships, which cannot now call at Comoros due to lack of facilities, is considered a prerequisite for general development. Such port facilities would eliminate the problems encountered with transshipment. Also they would enable ships to call even during adverse weather, while now they are cut-off for much of the cyclone season, necessitating the holding of considerable stocks. Overall costs would be reduced to the extent that transport costs and insurance premia could be lowered and fewer funds tied up in stocks. Improved

1/ French consultants, BCEOM, have completed feasibility studies for the extension of the Mutsamudu port and for construction of a port at Fomboni; SECMO, as a French consultancy firm, is currently undertaking a study on probable improvements for the Moroni port. Completed studies propose:

Mutsamudu. Extend the existing jetty/quay 120 m (x 30 m wide) utilizing massive concrete blocks; extend the existing tetrapod protection on the offshore side of the jetty; and dredge the harbor alongside the quay extension to -9.0 m at low water. Mention is also made of the probable necessity to relocate the mouth of the river at Mutsamudu to eliminate the debris now carried into the harbor. Not including relocating the rivermouth, the estimated cost by BCEOM (October 1973) was given as approximately US\$5.7 million. Actual cost estimate, including detailed engineering, cargo handling equipment and a 1,000-1,500 hp tug to operate in the deep berth, is now about US\$15 million.

Fomboni. Provide a new quay (60 m x 30 m) at a new location 2.0 km from the town, the quay to be of large concrete block construction protected on the weather side by tetrapods; construct a 200 m access road; dredge along the new quay to a depth of -5.0 m at low water. The Fomboni project, at end 1973 prices, was estimated to cost US\$3.0 million, now about US\$6.25 million.

ship transport might encourage potential investors, and import origins could be diversified. Some of the traffic that now has to be airborne could be shifted to cheaper sea transport. However, the lowering of costs to the economy depends also on the amortization and interest charges associated with the capital cost of the port improvements. The latter would be considerable in relation to the present traffic and would, initially at least, more than offset the measurable economic advantages.

45. The Government wishes to proceed as fast as possible for fear that any construction delay would only add to the financial burden owing to price escalation. For instance, cost estimates have more than doubled in 4 years; had works started in 1973, the value of the ensuing debt would now be less than half of the debt that would arise should they start now at 1977 prices. The fact that the Government would obtain credit at an interest rate lower than the opportunity cost of capital means that the results of a financial analysis differ from those that would be obtained on a strictly economic basis. As was noted above (p. 5-6), the Matsumudu port operates at less than half its present capacity; whilst the system is rudimentary, it is nonetheless cost effective and does not result in delays. There is no good evidence that the major shipping companies would increase services if the port were improved; indeed the low volume of traffic suggests the contrary. The amount of finance required is extremely large relative to the volume of traffic and, if available, would benefit the economy more if invested in agricultural or industrial development.

Future Road Development

46. The Ministry of Public Works (MOW) staff have prepared a list of road sections to be improved or constructed, totaling some 450 km, in order to establish the main network. One of the objectives is to complete the coastal circular road on each island. For some of the proposed road sections, preliminary engineering designs were undertaken under the French administration. 1/ But there is no implementation plan nor program; nor is there any planning capacity to prepare one. The Government is, however, concerned to coordinate road and agricultural development.

1/ Available studies cover:

in Grande Comore:	Bandamadji - Itsijoudi (25.6 km)
	Dembeni-Nioumadzaka (17.7 km)
	Route du Karthala (20.9 km)
in Anjouan:	Route circulaire de Nioumakele (30.3 km)
	Pomoni-Moya (6 km)
	Moya-M'Remani (16.5 km)
in Moheli:	Fomboni-Hoani (7 km)
	Hoani-miringoni (20 km)

An economic analysis of the justification of construction has also been undertaken, but methodology employed is not satisfactory.

47. In order to implement the main road construction program, the Government plans to establish several force account units. At present, only private foreign contractors carry out road construction, and for short sections force account units should be more economic. The MOW organization will be decentralized, with only a reduced core of technical staff remaining at the central level. The Government intends each district (Bayou) to have its own force account unit (6 in all) with the necessary capacity for both construction and main road maintenance, but no analysis has been done to determine the optimal level of decentralization in relation to the amount of work (which has not been determined either) and to the availability of qualified staff. The Government also aims to create vehicle repair shops at each district. The need for technical assistance to carry out the reorganization is recognized; expatriate specialists are required even for the present simple system.

48. It is intended that the newly created moudirias will both construct and maintain feeder roads with self-help labor-intensive methods. The moudirias are to plan development within their areas, and are to coordinate action in the various sectors as required, with only minimum assistance from district headquarters. The Ouam Vocational Training Centre is training mechanics, draftsmen, topographers, electricians, and carpenters who will be assigned to the moudirias. There will be no sectoral division of jobs, but rather technicians will have to assist in any type of project that requires their skill. Equipment and tools will also be pooled. Although people are expected to assist on a voluntary basis for the tasks requiring unskilled labor (such as road maintenance), any voluntary worker will be paid a minimum wage to assure his livelihood and encourage participation.

Future Airport Development

49. The Government considers the number and type of airports to be adequate for present and foreseeable needs. However, some improvements in buildings and equipment are proposed: first, the completion of Hahaia airport (as mentioned on p. 7); second, freight and aircraft hangers 1/; third, a radar cyclone forecasting system 2/ as the one existing in Madagascar does not cover entirely the Comorian area. In addition, more qualified staff need to be trained to provide efficient services.

Modal Coordination

50. As mentioned, only interisland traffic is considered to require intermodal coordination, and in order to improve services, the Government is in the process of merging Air Comores and the Societe de Navigation. An Infrastructure Committee composed of the Commissioner of Planning,

1/ Estimated at CFAF 400 million.
2/ Estimated at CFAF 200 million.

Secretary General of the Ministry of Finance, the four senior officials of the Ministry of Works and the Presidential Advisers has been established to decide on priorities and relate infrastructure needs to development in other sectors.

B. Expenditures and Financing

51. Prior to independence more than half the expenditures for transport infrastructure were financed by foreign sources, mainly France and the European Development Fund. Even so, total expenditure per year averaged only about CFAF 215 million (US\$0.9 million) since 1970, excluding the construction of Hahaia airport, which was directly financed by France. FIDES was the main source of funds for infrastructure, committing from 1970 to 1974, CFAF 528 million (US\$2.2 million) for new road construction, CFAF 158 million (US\$0.65 million) for airfields and CFAF 59 million (US\$0.24 million) for ports. The Ministry of Works local budget provided an average each year CFAF 12 million for new road construction and CFAF 40 million for maintenance (i.e. a total of US\$0.25 million pa).

52. When French funds were withdrawn in mid-1975, ongoing road construction on each island was interrupted. The Kuwait Fund provided CFAF 1,300 million (US\$5.3 million) in early 1976 to complete those works which had been started 1/, and to finance some road maintenance equipment, the procurement list of which was approved in March 1977. This is the only major foreign assistance to the sector since independence.

53. The general budget provides for some infrastructure construction as well as maintenance, and in addition, a Road Fund is earmarked for new road construction. The Road Fund was established in 1959; it is credited annually with the revenues from the tax on gasoline, and can only be used for road improvement and for payment of principal and interest of loans for new roads. Any surplus is carried over to the following year. The Government is considering including this fund in the general budget, but without otherwise changing it. The Ministry of Public Works is responsible for reporting on executed works during the previous fiscal year, and on the financial balance. In 1976, the Road Fund amounted to CFAF 100 million (US\$0.4 million) including CFAF 58 million carried over from 1975.

54. The Government is proceeding in 1977 with quarterly budgets, as revenue receipts are uncertain. Faced with a budgetary crisis the figures included in the first quarter's budget for recurrent expenditure is only CFAF 3 million for the Ministry of Public Works; CFAF 15 million for the Ministry of Transport and CFAF 10 million for airport maintenance. There is no allocation for new investments in the sector. In order to reduce costs, all officials' salaries have been halved, but even so the allocated amounts

1/ Sima-Pomoni in Anjouan; Fomboni-Nioumachoua in Moheli; and Mitsamiouli-M'Beni-Koumbani and Fomboni-Bandamadji in Grande Comore.

are less than half the real values of previous years. Moreover, expenditure actually authorized is less than the official allocations. In April the Government embarked on a major restructuring of the Administration, the outcome of which is not yet known.

4. CONCLUSION

55. Whereas Comoros' civil aviation facilities are relatively well developed, the roads and ports are poor. However, harbor construction is costly and the volume of sea traffic is too low at this juncture to justify any major investments in new ports. The best measure to improve the transport of imports would be to establish better procedures for the procurement of goods. The upgrading and extension of the road network, on the other hand, is urgently needed and fully justified. Indeed investment in better roads is a prerequisite for almost all other developments. If the objective of improving road transport is to be achieved, not only must new roads be constructed, but also the capacity for road maintenance must be expanded. It is therefore concluded that high priority should be given, both (i) to planning a comprehensive road construction program and (ii) to carrying out a study of the road maintenance organization. Meanwhile, the next phase of construction of the main road network (which has already been prepaved) should be undertaken as soon as the works now being constructed have been completed. At the same time, the Government should proceed with feeder road construction using self-help labor and World Food Program assistance.

ANNEX II

NOTE ON THE CONSTITUTION OF APRIL 23, 1977

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General

1. The new Constitution (Loi Fondamentale) was adopted by the National People's Council on April 23, 1977. In its transitional provisions the new Constitution nominated the actual Head of State (President Ali Soilih) to be responsible for establishing the new institutions over a period of six months. There was also provision for a referendum to ratify the Constitution to be held after control over Mayotte had been achieved. On May 13, 1977 President Soilih enacted Decree No. 77-03/CE determining the organization of the new government administration. According to the two basic texts (i.e. the Loi Fondamentale and Decree No. 77-03/CE) the new Comorian State will rest on four separate structures, namely representative political institutions, a government administration, the People's Army and the Judiciary.

2. The constitution defines that the State include all the islands of the Comoros Archipelago. No part of the territory of the State may be alienated under any circumstances. The autonomy of the local authorities in matters affecting only the local communities is guaranteed, and the activities of the Central Government are limited to questions of national concern. The State is described as the instrument of the workers for the improvement of their living standards.

3. The Constitution proclaims Comoros as a secular republic, but nonetheless stresses that the State should be guided by the authentic values of Islam. In this context mention is made of the need to struggle against idleness and the exploitation of ignorance. The Constitution enshrines the principles set out in Declaration of Human Rights adopted by the United Nations on December 10, 1948 and provides equal rights for men and women. The territory's natural resources are to be exploited in the general interest.

Political Institutions

4. The new political system is based on a combination of direct and indirect elections. At the grassroots level -that is the village or town ward (quartier), People's Committees (Comité Populaire de Base) will be elected; everyone above the age of 14 will be entitled to participate in the election. These committees will in turn elect cantonal (moudiria), district (bavou), island (wilaya) and national committees. The power and functions of these committees are not fully defined in the constitution; it is simply stated that they are to be "associated" with the preparation and formulation of major political decisions and legislation. Each wilaya will come under the authority of an elected Mouhafidh (or Governor). Until Comoros regains sovereignty over Mayotte, no elections will take place at the national level and state officials will be appointed by the President on the advice of the Council of State. Elections of the People's Committees at the lower levels will take place during the transitional period. The highest political organ is the National Congress comprised of all the

elected members of the moudirias' People's Committees. The National Congress nominates the Presidential and Vice-Presidential candidates and, until sovereignty over Mayotte is regained, it constitutes an electoral college, which directly chooses the President and Vice-President.

Government Administration

5. As far as possible, the new Administration will be decentralized down to the moudiria, which is to be administered by a Moudir. Moudirias are expected to be grouped into bavous. The bavou is to be the principal unit of local Government; the bavou is to be administered by a Liwali and is to be administratively autonomous. The Central Government will consist of a Council of State composed of the President, a Vice-President (both to be ultimately elected through general elections) and a maximum of nine members to be appointed by the President in consultation with the National People's Committee.

6. Three main departments of Government will be established, namely:

- (i) A National Center for Planning, Finances and Methods, attached directly to the Presidency, to be headed by a Coordinateur who will be a member of the Council of State and to be subdivided into five sections dealing with production, infrastructure, statistics, finance and studies;
- (ii) A Central Committee for Internal Affairs which will, among other things, be responsible for education, health and which will exercise direct supervision over the Liwalis; and
- (iii) A Central Committee for external affairs that will be responsible, among other things, for aid coordination and the negotiation and administration of cooperation agreements.

People's Army

7. Pursuant to Decree No. 77-03/CE, a National Defense Council is to be established under the direct control of the President, which will consist of the various national and regional army commanders.

Judiciary

8. The President is responsible for ensuring the independence of the Judiciary. Primary courts will be established in each moudiria, a court of appeal (or high court) in each bavou and there will be a national supreme court. All judicial officers are to be appointed by the President.

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Table/Tableau 1.1

POPULATION ESTIMATES AND PROJECTIONS^{3/} 1958-2000
 ESTIMATIONS ET PROJECTIONS DE LA POPULATION 1958-2000
 (as at July 1/au 1er juillet)

1958 ^{1/}	192,000	1980	411,465
1966 ^{2/}	246,144	1981	424,931
1970	281,993	1982	438,310
1971	291,537	1983	452,129
1972	301,356	1984	466,454
1973	311,491	1985	481,335
1974	321,992	1986	496,808
1975	332,917	1987	512,901
1976	344,326	1988	529,640
1977	370,000	1989	547,056
1978	384,717	1990	565,192
1979	397,958	2000	798,208

1/ Based on 1958 census increased by 5 percent to allow for undercount.

Basé sur le recensement de 1958 augmenté de 5% afin de tenir compte de la sous-estimation.

2/ Based on 1966 census.

Basé sur le recensement de 1966.

3/ Projections have assumed constant fertility and gradually declining mortality with 1500 net immigrants annually between 1966 and 1976, 18,000 in 1977, 1,500 in 1978, 1,000 in 1979 and 1,000 in 1980, but zero net immigration thereafter.

Les projections se fondent sur l'hypothèse d'une fertilité constante et d'une mortalité en déclin, accompagnées d'un solde migratoire net de 1.500 immigrants par an entre 1966 et 1976, 18.000 en 1977, 1.500 en 1978, 1.000 en 1979 et 1.000 en 1980; par la suite le solde migratoire tomberait à zéro.

Source: IBRD estimates/estimations de la BIRD.

Table/Tableau 1.2

POPULATION ESTIMATED BY SEX AND AGE GROUP--1966, 1976 and 1986
 ESTIMATIONS DE LA POPULATION PAR SEXE ET GROUPE D'AGE--1966, 1976 et 1986
 (as at January 1/au 1er janvier)

Age Group Groupe d' age	TOTAL	1966		TOTAL	1976		TOTAL	1986	
		MALE HOMMES	FEMALE FEMMES		MALE HOMMES	FEMALE FEMMES		MALE HOMMES	FEMALE FEMMES
0-4	40353	20506	19847	62255	31251	31004	91287	45817	45470
5-9	41025	21249	19776	50853	25515	25338	72834	36464	36370
10-14	26606	14531	12075	36880	18820	18060	57825	29105	28720
15-19	22293	10675	11618	39726	20700	19026	49807	25150	24657
20-24	16279	7053	9226	26256	14463	11793	36356	18688	17668
25-29	18499	7984	10515	22381	10979	11402	39246	20612	18634
30-34	14643	6324	8319	16901	7755	9146	27051	15195	11856
35-39	11512	5180	6332	18906	8627	10279	23509	12048	11461
40-44	10930	5085	5845	15100	6969	8131	18259	8995	9264
45-49	7403	3638	3765	11878	5693	6185	19664	9503	10161
50-54	8653	4147	4506	10840	5259	5581	15580	7598	7982
55-59	4544	2300	2244	7186	3653	3533	11820	5903	5917
60-64	6516	3333	3183	7722	3774	3948	9995	4963	5032
65-69	3354	1761	1593	3785	1951	1834	6377	3342	3035
70-74	3888	2092	1796	4183	2078	2105	5514	2692	2822
75+	5318	3009	2309	3644	1879	1765	3796	1828	1968

Source: 1966 Census and IBRD estimates.
 Recensement de 1966 et estimations de la BIRD.

Table/Tableau 1.3

BALANCE OF MIGRATION BETWEEN ISLANDS, MID-1966

SOLDE MIGRATOIRE INTER-ILES, MI-1966

<u>Origin of migrants</u> <u>Origine des migrants</u>	<u>Islands receiving migrants</u> <u>Iles recevant les migrants</u>			
	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>
Grande Comore	-	-332	279	648
Anjouan	332	-	2,113	1,615
Mayotte	-279	-2,113	-	80
Mohéli	-648	-1,615	-80	-
Total	-595	-4,060	2,312	2,343

Source: Bureau des Etudes et des Enquêtes Statistiques, Moroni.

Table/Tableau 1.4

BIRTH PLACES OF PERSONS ENUMERATED, 1966

LIEU DE NAISSANCE DES PERSONNES RECENSEES, 1966

<u>Birth Place</u>	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Total</u>	<u>Lieu de naissance</u>
On the same island	115,582	82,682	29,100	6,816	234,180	Dans l'île même
On another Comorian island	1,094	432	3,118	2,627	7,271	Dans une autre île comorienne
Abroad	2,448	715	389	102	3,654	Ailleurs
<u>Total</u>	<u>119,124</u>	<u>83,829</u>	<u>32,607</u>	<u>9,545</u>	<u>245,105</u> ^{1/}	<u>Total</u>

^{1/} This figure does not include 19,039 persons whose birth place was not recorded/
Ce chiffre ne comprend pas 19.039 personnes dont le lieu de naissance n'a pas
été enregistré.

Source: Bureau des Etudes et des Enquêtes Statistiques, Moroni.

Table/Tableau 1.5

DISTRIBUTION OF SETTLEMENTS BY SIZE, 1966

DISTRIBUTION DES AGGLOMERATIONS PAR CLASSE DE TAILLE, 1966

<u>Number of Inhabitants in a settlement</u>	<u>Grande Comore</u>		<u>Anjouan</u>		<u>Mayotte</u>		<u>Mohéli</u>		<u>Nombre d'habitants par agglomération</u>
	<u>Number</u> <u>Nombre</u>	<u>Percent</u> <u>Pourcent</u>	<u>Number</u> <u>Nombre</u>	<u>Percent</u> <u>Pourcent</u>	<u>Number</u> <u>Nombre</u>	<u>Percent</u> <u>Pourcent</u>	<u>Number</u> <u>Nombre</u>	<u>Percent</u> <u>Pourcent</u>	
Under 500	108	57.8	31	37.8	47	69.1	17	73.9	En-dessous de 500
500 to 1,000	52	27.8	25	30.5	12	17.7	5	21.7	de 500 à 1.000
over 1,000	27	14.4	26	31.7	9	13.2	1	4.4	Au-dessus de 1.000
Total	187	100.0	82	100.0	68	100.0	23	100.0	Total

Source: Bureau des Etudes et des Enquêtes Statistiques, Moroni.

Table/Tableau 1.6

SELECTED POPULATION DATA
STATISTIQUES CHOISIES DE LA POPULATION

	<u>1966</u>	<u>1976</u>	<u>1986</u>	<u>1996</u>	
Crude Birth Rate (per 1000 population)	50.2	46.1	45.2	45.9	Taux de Naissance Brut (pour 1000 habitants)
Crude Death Rate (per 1000 population)	21.1	16.6	13.4	10.9	Taux de Mortalité Brut (pour 1000 habitants)
Life Expectancy					Espérance de Vie
Male	44	48	52	56	Hommes
Female	48	52	57	61	Femmes

Source: IBRD Estimates based on the 1966 Census data.
Estimations de la BIRD basées sur les données recueillies lors
du recensement de 1966.

Table/Tableau 1.7

REGISTERED SALARIED EMPLOYMENT BY SECTOR 1970-75
 ENREGISTREMENTS DES SALARIES PAR BRANCHE D'ACTIVITE 1970-75
 (end of year/fin de l'année)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975^e</u>	
Agriculture and processing	6,933	5,928	6,192	5,931	4,310	3,239	Agriculture et transformation
Industry	278	330	403	483	535	637	Industrie
Construction	1,392	1,420	1,675	2,063	1,869	1,021	Construction
Trade and banking	666	822	1,095	1,151	1,233	1,137	Commerce et banques
Transport	483	328	373	707	644	325	Transport
Hotels & tourism	106	110	114	171	120	140	Hotels et tourisme
Public services ^{1/}	2,264	2,319	2,699	2,611	5,103	2,146	Services publics ^{1/}
Other services	587	838	626	389	380	250	Autres services
Total	12,709	12,295	13,310	13,506	14,194	8,895	Total

^{1/} Excluding permanent civil servants who numbered 2,113 in 1973.
 Non compris les fonctionnaires, décisionnaires et auxiliaires, au nombre de 2113 en 1973.

e = estimation

Source: Department of Labor/Direction du Travail.

Table/Tableau 1.8

REGISTERED SALARIED EMPLOYMENT BY SECTOR AND ISLAND, 1974
ENREGISTREMENTS DES SALARIES PAR BRANCHE D'ACTIVITE ET PAR ILE, 1974

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	
Agriculture and processing	842	2,098	1,024	346	4,310	Agriculture et transformation
Industry	367	168	..	..	535	Industry
Construction	1,285	367	217	..	1,869	Construction
Trade and banking	708	267	250	8	1,233	Commerce et banques
Transport	449	159	23	13	644	Transport
Hotels and Tourism	90	26	..	4	120	Hotels et tourisme
Public services ^{1/}	2,999	1,297	475	332	5,103	Services publics
Other services	197	108	49	26	380	Autres services
Total	6,937	4,490	2,038	729	14,194	Total

.. not recorded/non-enregistré

^{1/} Excludes permanent civil servants
Non compris les fonctionnaires, décisionnaires et auxiliaires.

Source: Department of Labor/Direction du Travail.

' Table/Tableau 2.1

GROSS DOMESTIC PRODUCT BY INDUSTRIAL ORIGIN, 1968-1975
 PRODUIT INTERIEUR BRUT PAR BRANCHE D'ACTIVITE ECONOMIQUE, 1968-1975
 (in current market prices; in millions of CFAF)
 (aux prix courants du marché; en millions de FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	
Agriculture	2,890	3,151	3,275	3,560	3,671	3,649	5,619	5,718	Agriculture
Industry	388	439	492	626	694	633	1,037	1,105	Industrie
Construction	778	711	1,152	1,515	1,783	2,483	2,986	2,001	Bâtiment et travaux publics
Electricity	11	13	17	29	31	33	53	65	Electricité
Wholesale and retail trade	1,511	1,780	1,929	2,301	2,353	2,522	4,558	3,847	Commerce de gros et au détail
Transport	69	75	93	106	145	149	325	230	Transports
Rent	330	359	379	451	469	556	751	854	Loyers
Other Services	38	36	42	54	60	49	55	50	Services Divers
Public Services	590	619	664	790	810	1,008	1,397	1,141	Services Publics
<u>Gross domestic product, in market prices</u>	<u>6,605</u>	<u>7,183</u>	<u>8,043</u>	<u>9,432</u>	<u>10,016</u>	<u>11,082</u>	<u>16,781</u>	<u>15,011</u>	<u>Produit intérieur brut, aux prix du marché</u>
Indirect taxes and subsidies	514	597	696	827	856	886	1,376	1,289	Impôts indirects et subventions
<u>Gross domestic product at factor cost</u>	<u>6,091</u>	<u>6,586</u>	<u>7,347</u>	<u>8,605</u>	<u>9,160</u>	<u>10,196</u>	<u>15,405</u>	<u>13,722</u>	<u>Produit intérieur brut, au coût des facteurs</u>

Source: INSEE, Etude sur les Comptes Economiques du Territoire des Comores, 1964-1968, and mission estimates/ et estimations de la mission

Table/Tableau 2.2

GROSS DOMESTIC PRODUCT BY INDUSTRIAL ORIGIN, 1968-1975
 PRODUIT INTERIEUR BRUT PAR BRANCHE D'ACTIVITE ECONOMIQUE, 1968-1975
 (in constant market prices of 1975; in millions of CFAP)
 (aux prix constants du marché de 1975; en millions de FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	
Agriculture	4,822	5,050	5,127	5,392	5,463	5,322	5,660	5,718	Agriculture
Industry	798	871	933	993	1,101	1,027	1,122	1,105	Industrie
Construction	1,686	1,461	2,305	2,628	3,058	3,709	3,397	2,001	Bâtiment et travaux publics
Electricity	27	32	37	50	51	56	60	65	Electricité
Commerce	2,623	2,760	3,048	3,693	3,706	3,476	4,325	3,847	Commerce
Transport	150	161	188	192	247	275	327	30	Transports
Rent	715	737	759	783	804	830	854	854	Loyers
Other Services	83	81	86	94	93	70	62	50	Services divers
Public Services	1,171	1,195	1,282	1,323	1,115	1,008	1,397	1,141	Services publics
<u>Gross domestic product, in market prices</u>	<u>12,076</u>	<u>12,348</u>	<u>13,766</u>	<u>15,148</u>	<u>15,638</u>	<u>15,773</u>	<u>17,204</u>	<u>15,011</u>	<u>Produit intérieur brut, aux prix du marché</u>
Indirect taxes and subsidies	940	1,014	1,182	1,326	1,338	1,261	1,411	1,289	Impôts indirects et subventions
<u>Gross domestic product at factor cost</u>	<u>11,136</u>	<u>11,334</u>	<u>12,584</u>	<u>13,822</u>	<u>14,300</u>	<u>14,512</u>	<u>15,793</u>	<u>13,722</u>	<u>Produit intérieur brut, au coût des facteurs</u>

Source: INSEE, Etude sur les Comptes Economiques du Territoire des Comores, 1964-1968, and mission estimates/et estimations de la mission

Table/Tableau 2.3

PUBLIC AND PRIVATE INVESTMENT, 1968-1975
 INVESTISSEMENTS PUBLICS ET PRIVÉS, 1968-1975
 (in millions of CFAF/en millions de FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	
Total investment in current prices	1,329	1,479	2,148	2,487	3,063	3,958	5,139	3,559	Investissements aux prix courants
as percent of GDP	20	20	27	26	31	36	31	24	en pourcentage du PIB
Total investment in constant 1975 prices	2,916	3,028	4,098	4,250	4,948	5,152	6,158	3,559	Investissements aux prix constants de 1975
as percent of GDP	24	25	30	28	32	33	36	24	en pourcentage du PIB

Source: Mission estimates/estimations de la mission

Table/Tableau 3.1

FINANCIAL FLOWS FROM AND TO DAC MEMBER COUNTRIES AND MULTILATERAL ORGANIZATIONS, 1969-1975
 FLUX FINANCIERS EN PROVENANCE ET VERS LES PAYS MEMBRES DU CAD ET LES ORGANISMES D'AIDE MULTILATERALE, 1969-1975
 (in millions of U.S. dollars)
 (en millions de dollars E.U.)

	1969	1970	1971	1972	1973	1974	1975	
A. Official flows								A. Aides officielles
1. <u>Bilateral</u>								1. <u>Aides bilatérales</u>
<u>Official Development Assistance (ODA)</u>								<u>Aides officielles pour le développement</u>
Technical assistance grants	4.50	4.80	6.40	6.60	8.49	13.31	6.56	Dons au titre de l'assistance technique
Other grants	2.00	2.00	1.50	3.07	7.89	12.48	10.37	Autres dons
Grant-like flows	-	-	-	-	-	-	-	Flux de nature comparable à des dons
Loans	0.10	0.20	0.40	0.47	1.00	1.41	0.89	Prêts
Other Official Flows	-	-	-	-	-	0.20	-	Autres aides officielles
<u>Total Bilateral Official Flows (gross)</u>	6.60	7.00	8.30	10.14	17.38	27.40	17.82	<u>Total des aides officielles bilatérales (brut)</u>
Debt service payments	0.30	0.20	0.20	0.35	0.40	0.10	0.35	Palements du service de la dette
<u>Total Bilateral Official Flows (net)</u>	6.30	6.80	8.10	9.79	16.98	27.30	17.47	<u>Total des aides officielles bilatérales (net)</u>
(of which France)	(6.30)	(6.80)	(7.90)	(9.79)	(16.98)	(27.30)	(17.47)	(dont France)
2. <u>Multilateral</u>								2. <u>Aides multilatérales</u>
<u>Official Development Assistance (ODA)</u>								<u>Aides officielles pour le développement</u>
Technical assistance grants ^{2/}	0.04	0.01	0.06	0.13	0.10	0.22	0.13	Dons au titre de l'assistance technique ^{2/}
Other grants ^{3/}	0.02	1.08	0.66	0.05	0.54	0.11	3.53	Autres dons ^{3/}
Loans	-	-	-	-	-	-	-	Prêts
Other Official Flows	-	-	-	-	-	-	-	Autres aides officielles
<u>Total Multilateral Official Flows (gross)</u>	0.06	1.09	0.72	0.18	0.64	0.33	3.66	<u>Total des aides officielles multilatérales (brut)</u>
Debt service payments	-	-	-	-	-	-	-	Palements du service de la dette
<u>Total Multilateral Official Flows (net)</u>	0.06	1.09	0.72	0.18	0.64	0.33	3.66	<u>Total des aides officielles multilatérales (net)</u>
(contributions to multilateral organizations)	-	-	-	-	-	-	-	(contributions aux organismes multilatéraux)
B. Private flows ^{1/}								B. Flux financiers privés ^{1/}
C. Summary								C. Récapitulation
Official Flows (gross)	6.66	8.09	9.02	10.32	18.02	27.73	21.48	Aides officielles (brut)
Official Flows (net)	6.36	7.89	8.82	9.97	17.62	27.63	21.13	Aides officielles (net)

^{1/} Private flows to Comoros were not recorded by DAC/Les flux financiers privés vers les Comores n'ont pas été enregistrés par le CAD
^{2/} Mainly UN/Principalement NU
^{3/} Mainly EIF/Principalement FED

Table/Tableau 1.2
 COMMODITY EXPORTS, FOB VALUE, 1968 - 1976
 EXPORTATIONS DE MARCHANDISES, EN VALEUR FOB, 1968 - 1976
 (in millions of CFAF)
 (en millions de FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	
<i>Essences of ylang-ylang</i>										<i>Essences d'ylang-ylang</i>
Extra	213.8	202.8	181.6	200.7	261.2	316.3	359.5	236.7	299.1	Extra
First quality	28.1	13.0	16.4	28.6	41.3	51.8	70.7	57.0	40.3	Première qualité
Second quality	21.3	14.9	22.8	15.1	33.2	42.8	64.2	20.2	28.2	Deuxième qualité
Third quality	106.5	106.5	112.1	104.9	159.3	149.0	278.6	189.2	246.4	Troisième qualité
Condensed	0.3	2.9	2.7	3.0	5.9	9.5	12.2	11.2	4.0	Concrète
Essence of jasmine	25.6	29.4	18.0	16.7	15.8	12.4	16.7	26.3	5.5	Essence de jasmin
Essence of basil	12.0	5.5	19.7	48.8	14.5	4.7	16.0	20.3	14.5	Essence de basilic
Essence of palmarosa	3.9	3.8	5.4	4.8	4.3	5.4	6.3	3.0	3.5	Essence de palmarosa
Other essences	7.7	8.1	6.6	10.1	12.0	25.6	31.2	2.8	14.7	Autres essences
Vanilla	349.3	577.9	403.1	605.9	613.8	100.1	472.9	689.0	464.9	Vanille
Copra	176.4	211.6	197.6	206.5	90.4	229.6	495.9	92.6	122.7	Coprah
Cloves	25.0	58.6	222.7	268.4	165.1	87.7	242.3	585.9	812.0	Girofle
Sisal	9.8	7.6	6.3	2.9	-	-	-	-	-	Sisal
Cocoa	8.6	11.3	8.6	2.2	5.7	3.0	14.0	6.0	5.1	Cacao
Coffee	6.4	7.7	22.6	15.4	21.6	9.1	9.3	14.0	17.4	Café
Cinnamon	3.6	14.6	18.5	26.1	52.6	45.0	24.8	2.1	0.4	Cannelle
Construction mat. (lava gravel)	6.8	6.0	6.2	6.7	8.0	2.4	-	-	-	Pouzzolane
Wood	-	-	-	-	-	-	-	-	11.6	Bois
Furniture and wood products	0.2	0.3	0.5	0.1	-	0.4	0.1	0.6	0.9	Meubles et ouvrages de menuiserie
Other	2.7	6.2	6.1	5.2	5.3	11.0	6.7	7.7	6.8	Divers
<u>Total domestica exports</u>	<u>1,008.0</u>	<u>1,288.7</u>	<u>1,277.5</u>	<u>1,572.1</u>	<u>1,510.0</u>	<u>1,105.8</u>	<u>2,121.4</u>	<u>1,964.6</u>	<u>2,098.0</u>	<u>Total exportations domestiques</u>
Re-exports	0.2	0.4	0.6	-	3.2	0.5	16.5	71.8	126.0	Réexportation
of which petroleum products	(-)	(-)	(.)	(-)	(0.3)	(0.3)	(14.9)	(71.3)	(125.3)	dont produits pétroliers
<u>Total exports</u>	<u>1,008.2</u>	<u>1,289.1</u>	<u>1,278.1</u>	<u>1,572.1</u>	<u>1,511.2</u>	<u>1,106.3</u>	<u>2,137.9</u>	<u>2,036.4</u>	<u>2,224.0</u>	<u>Total exportations</u>

. Too small to be expressed/valeur insignifiante

Source: Service des Douanes, Ministère des Finances

Table/ Tableau 3.3

COMMODITY EXPORTS, VOLUME, 1968-1976
 EXPORTATIONS DE MARCHANDISES, EN VOLUME, 1968-1976
 (in Kg./en Kg.)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^{1/}	
Essences of ylang-ylang										Essences d'ylang-ylang
Extra	22,994	22,971	20,535	22,085	28,119	31,930	27,138	16,485	19,610	Extra
First quality	4,582	2,154	2,741	4,679	6,918	7,241	7,512	5,219	4,135	Première qualité
Second quality	6,024	4,167	6,302	3,898	8,550	10,213	9,429	2,806	3,687	Deuxième qualité
Third quality	39,386	38,095	40,882	36,406	55,080	49,633	54,446	34,865	45,498	Troisième qualité
Condensed	29	275	274	272	538	863	769	650	226	Concrète
Essence of jasmine	298	355	257	239	232	176	204	134	27	Essence de jasmin
Essence of basil	2,356	1,111	2,995	6,497	2,156	903	1,760	1,389	1,119	Essence de basilic
Essence of palmarosa	886	810	1,080	1,015	978	1,547	1,201	408	735	Essence de palmarosa
Other essences	757	874	428	661	770	1,339	812	232	414	Autres essences
Vanilla	138,418	207,105	143,718	206,658	207,007	34,335	160,473	210,901	124,055	Vanille
Copra	4,152,902	5,265,520	4,371,034	3,988,401	2,423,521	4,890,285	4,178,069	1,259,633	2,322,557	Coprah
Cloves	88,588	87,378	277,356	373,023	202,567	120,628	248,545	561,865	880,152	Girolfle
Sisal	355,444	217,600	194,500	86,875	-	-	-	-	-	Sisal
Cocoa	42,030	50,875	48,105	15,980	49,715	19,260	38,462	21,010	10,700	Cacao
Coffee	39,126	42,814	102,727	72,996	101,532	42,424	38,160	60,864	31,712	Café
Cinnamon	34,143	68,075	119,310	163,596	298,893	209,171	105,451	9,531	1,500	Cannelle
Construction material (lava gravel)	7,808,000	6,888,000	7,044,500	7,640,200	8,215,600	1,900,000	-	-	-	Pouzzelane
Wood	-	-	-	-	-	-	275	-	225,577	Bois
Furniture	518	405	991	586	-	370	56	922	3,800	Meubles et ouvrages de menuiserie
Other	198,659	225,680	99,750	131,908	172,081	85,291	28,233	120,131	13,587	Divers
Re-exports	923	1,182	2,940	-	12,757	26,109	499,355	1,956,186	2,614,663	Réexportation
of which petroleum products	(-)	(-)	(1,681)	(-)	(11,018)	(24,295)	(495,990)	(1,955,783)	(2,604,939)	dont produits pétroliers

. Too small to be expressed/valeur insignifiante

1/ Excludes Mayotte/A l'exclusion de Mayotte

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.4

MERCHANDISE IMPORTS BY END-USE, C.I.F. VALUE, 1968-1975
 IMPORTATIONS PAR GROUPEMENT D'UTILISATION, VALEUR C.A.F., 1968-1975
 (in millions of CFAF)
 (en millions de FCFA)

	1968	1969	1970	1971	1972	1973	1974	1975	
<u>Food</u>	<u>686.9</u>	<u>714.1</u>	<u>856.6</u>	<u>1,070.6</u>	<u>1,065.3</u>	<u>1,145.7</u>	<u>2,749.4</u>	<u>1,439.4</u>	<u>Alimentation</u>
Meat	5.0	7.0	14.0	11.0	35.0	76.6	153.4	130.8	Viandes et abats
Rice	415.0	420.1	455.2	630.0	455.0	576.7	1,860.8	738.4	Riz
Wheat flour	38.3	28.2	39.3	70.0	41.3	52.5	96.8	92.2	Farine
Sugar	49.0	54.1	72.4	66.0	73.0	96.0	128.6	84.1	Sucre
Other	179.6	204.7	275.7	293.6	461.0	343.9	509.8	393.9	Divers
<u>Other consumer goods</u>	<u>548.3</u>	<u>680.2</u>	<u>869.6</u>	<u>964.8</u>	<u>1,007.8</u>	<u>1,194.6</u>	<u>1,537.1</u>	<u>1,588.9</u>	<u>Produits finis</u>
Cigarettes	21.0	25.0	28.0	33.0	33.0	47.0	62.0	47.0	Cigarettes
Pharmaceuticals	..	39.3	38.3	64.6	82.1	83.0	92.3	147.9	Produits pharmaceutiques
Cotton textiles	69.8	96.0	134.1	158.8	148.3	173.5	276.8	283.2	Textiles
Passenger cars	30.0	42.0	60.5	107.2	80.4	87.2	106.4	97.7	Voitures
Other	..	477.9	608.7	601.2	664.0	803.9	999.6	1,013.1	Divers
<u>Petroleum products</u>	<u>85.1</u>	<u>87.8</u>	<u>104.1</u>	<u>131.9</u>	<u>155.4</u>	<u>140.2</u>	<u>378.0</u>	<u>448.7</u>	<u>Produits pétroliers</u>
Aviation fuel	..	21.9	7.1	6.7	13.3	22.3	79.8	127.5	Essence d'aviation
Gasoline	..	21.4	25.4	29.3	43.4	39.8	117.2	120.5	Essence voitures
Heavy oil	29.0	34.2	42.9	43.6	59.9	59.9	154.8	115.7	Gas-oil
Other	..	10.3	28.7	52.3	38.8	18.2	26.2	85.0	Divers
<u>Intermediate goods</u>	<u>228.1</u>	<u>247.9</u>	<u>298.6</u>	<u>356.8</u>	<u>389.5</u>	<u>449.5</u>	<u>883.3</u>	<u>886.0</u>	<u>Matières premières et demi-produits</u>
Products of animal or vegetal origin	9.2	5.3	6.2	12.2	10.4	10.6	20.7	8.4	Produits d'origine animale ou végétale
Mineral products	13.2	8.5	10.3	11.4	1.4	1.5	2.6	13.0	Produits minéraux
Cement	46.3	59.0	73.4	81.0	109.2	63.7	288.3	251.3	Ciment
Corrugated iron	30.7	35.2	37.4	48.6	46.2	40.7	126.1	101.7	Tôles galvanisées
Iron bars	28.0	23.0	40.0	33.0	29.0	52.0	92.0	83.0	Barres de fer
Other	100.7	116.9	131.3	170.6	193.3	281.0	353.6	428.6	Divers
<u>Capital goods</u>	<u>214.6</u>	<u>361.7</u>	<u>244.4</u>	<u>310.6</u>	<u>314.4</u>	<u>438.9</u>	<u>655.1</u>	<u>611.5</u>	<u>Biens d'investissement</u>
Agricultural machinery	21.2	14.4	33.7	35.1	28.3	24.8	27.5	38.6	Equipement agricole
Industrial equipment of which: vehicles	193.4 (47.0)	347.3 (34.0)	210.7 (58.0)	275.5 (85.0)	286.1 (54.0)	414.1 (54.0)	627.6 (106.0)	573.0 (98.0)	Equipement industriel dont: véhicules industriels
<u>Total imports</u>	<u>1,763.0</u>	<u>2,091.7</u>	<u>2,373.3</u>	<u>2,834.7</u>	<u>2,932.4</u>	<u>3,368.9</u>	<u>6,202.9</u>	<u>4,974.5</u>	<u>Importations totales</u>

.. not available/non disponible

Table/Tableau 3.5

DIRECTION OF TRADE: EXPORTS BY COUNTRY OF DESTINATION, F.O.B. VALUE, 1968-1976
 REPARTITION DU COMMERCE EXTERIEUR: EXPORTATIONS PAR PAYS DESTINATAIRE, VALEUR F.O.B., 1968-1976
 (in millions of CFAF)
 (en millions de FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	
<u>E.E.C.</u>	<u>641.2</u>	<u>607.7</u>	<u>737.8</u>	<u>902.4</u>	<u>985.1</u>	<u>935.1</u>	<u>1,652.2</u>	<u>1,329.6</u>	<u>1,595.1</u>	<u>C.E.E.</u>
France	609.0	560.0	621.1	712.1	856.7	847.1	1,422.3	1,059.8	1,152.4	France
Reunion	1.1	1.3	2.1	0.5	2.4	1.3	2.0	5.3	13.6	Réunion
Belgium-Luxembourg	7.3	10.2	7.9	5.5	3.9	1.9	30.7	45.4	43.1	Belgique Luxembourg
Netherlands	0.8	5.1	23.5	56.7	30.8	29.7	63.9	82.6	125.7	Pays-Bas
Germany, Fed. Rep. of	22.6	31.1	69.6	118.4	91.0	46.5	98.3	128.5	228.8	République Fédérale d'Allemagne
Italy	-	-	5.0	3.4	0.3	6.0	35.0	3.0	6.3	Italie
United Kingdom	0.4	-	8.6	5.8	-	2.6	-	5.0	25.0	Royaume Uni
Danemark	-	-	-	-	-	-	-	-	0.2	Danemark
<u>E.F.T.A.</u>	<u>-</u>	<u>-</u>	<u>0.3</u>	<u>-</u>	<u>-</u>	<u>0.4</u>	<u>4.2</u>	<u>-</u>	<u>26.2</u>	<u>A.E.L.E.</u>
Sweden	-	-	0.3	-	-	0.4	1.8	-	20.9	Suède
Switzerland	-	-	-	-	-	-	1.1	-	4.9	Suisse
Austria	-	-	-	-	-	-	1.4	-	0.4	Autriche
<u>REST OF EUROPE</u>	<u>-</u>	<u>-</u>	<u>4.7</u>	<u>4.8</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>RESTE DE L'EUROPE</u>
<u>AFRICA</u>	<u>124.1</u>	<u>170.9</u>	<u>118.0</u>	<u>211.2</u>	<u>104.4</u>	<u>149.6</u>	<u>143.4</u>	<u>109.8</u>	<u>136.6</u>	<u>AFRIQUE</u>
Morocco	-	-	-	-	-	1.6	-	11.3	9.7	Maroc
Fr. Terr. of Afars & Issas	-	-	-	-	1.3	2.2	1.9	-	3.7	T.F.A.I.
Madagascar	123.6	167.7	114.3	209.1	101.5	107.8	127.6	98.5	79.6	Madagascar
Mauritius	0.1	0.1	-	-	-	37.6	14.0	-	20.1	Ile Maurice
South Africa	-	0.1	1.2	0.9	1.6	0.4	-	-	-	Afrique du Sud
Other	0.5	3.1	2.5	1.2	-	-	-	-	23.5	Divers
<u>AMERICA</u>	<u>242.9</u>	<u>507.4</u>	<u>347.3</u>	<u>452.8</u>	<u>420.7</u>	<u>20.8</u>	<u>321.9</u>	<u>525.0</u>	<u>338.5</u>	<u>AMERIQUE</u>
U.S.A.	240.4	507.4	347.3	452.8	417.7	20.8	321.9	525.0	338.5	Etats-Unis
Canada	2.5	-	-	-	3.0	-	-	-	-	Canada
<u>ASIA</u>	<u>-</u>	<u>2.6</u>	<u>69.2</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>0.2</u>	<u>2.3</u>	<u>ASIE</u>
Japan	-	-	-	-	-	-	-	0.2	1.8	Japon
Other	-	2.6	69.2	-	-	-	-	-	0.5	Divers
<u>RE-EXPORTS</u>	<u>0.2</u>	<u>0.5</u>	<u>0.8</u>	<u>1.0</u>	<u>1.1</u>	<u>0.5</u>	<u>16.5</u>	<u>71.8</u>	<u>125.3</u>	<u>RAVITAILLEMENT NAVIRES</u>
<u>TOTAL EXPORTS</u>	<u>1,008.2</u>	<u>1,289.1</u>	<u>1,278.1</u>	<u>1,572.1</u>	<u>1,511.2</u>	<u>1,106.3</u>	<u>2,137.9</u>	<u>2,036.4</u>	<u>2,224.0</u>	<u>EXPORTATIONS TOTALES</u>

1/ Excludes Mayotte
 A l'exclusion de Mayotte

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.6

DIRECTION OF TRADE: EXPORTS BY COUNTRY OF DESTINATION, F.O.B. VALUE, 1968-1976
 REPARTITION DU COMMERCE EXTERIEUR: EXPORTATIONS PAR PAYS DESTINATAIRE, VALEUR F.O.B., 1968-1976
 (in percent)
 (en pourcentage)

	1968	1969	1970	1971	1972	1973	1974	1975	1976 ^{1/}	
<u>E.E.C.</u>	<u>63.6</u>	<u>47.1</u>	<u>57.7</u>	<u>57.4</u>	<u>65.2</u>	<u>84.5</u>	<u>77.3</u>	<u>65.3</u>	<u>71.7</u>	<u>C.E.E.</u>
France	60.4	43.4	48.6	45.3	56.7	76.6	66.5	52.0	51.8	France
Reunion	0.1	0.1	0.2	.	0.2	0.1	0.1	0.3	0.6	Réunion
Belgium-Luxembourg	0.7	0.8	0.6	0.3	0.3	0.2	1.4	2.2	1.9	Belgique-Luxembourg
Netherlands	0.1	0.4	1.8	3.6	2.0	2.7	3.0	4.1	5.7	Pays-Bas
Germany, Fed. Rep. of	2.2	2.4	5.4	7.5	6.0	4.2	4.6	6.3	10.3	République Fédérale d'Allemagne
Italy	.	.	0.4	0.2	.	0.5	1.6	0.1	0.3	Italie
United Kingdom	.	.	0.7	0.4	.	0.2	.	0.2	1.1	Royaume Uni
<u>E.F.T.A. AND REST OF EUROPE</u>	<u>-</u>	<u>-</u>	<u>0.4</u>	<u>0.3</u>	<u>-</u>	<u>.</u>	<u>0.2</u>	<u>-</u>	<u>1.2</u>	<u>A.E.L.E. ET RESTE DE L'EUROPE</u>
<u>AFRICA</u>	<u>12.3</u>	<u>13.3</u>	<u>9.2</u>	<u>13.4</u>	<u>6.9</u>	<u>13.5</u>	<u>6.7</u>	<u>5.4</u>	<u>6.2</u>	<u>AFRIQUE</u>
Madagascar	12.3	13.0	8.9	13.3	6.7	9.7	6.0	4.8	3.6	Madagascar
Mauritius	.	.	.	.	.	3.4	0.6	.	0.9	Ile Maurice
Other	.	0.2	0.3	0.1	0.1	0.3	0.1	0.6	1.7	Divers
<u>AMERICA</u>	<u>24.1</u>	<u>39.4</u>	<u>27.2</u>	<u>28.8</u>	<u>27.8</u>	<u>1.9</u>	<u>15.1</u>	<u>25.8</u>	<u>15.2</u>	<u>AMERIQUE</u>
U.S.A.	23.8	39.4	27.2	28.8	27.6	1.9	15.1	25.8	15.2	Etats-Unis
Canada	0.3	.	.	.	0.2	.	.	.	.	Canada
<u>ASIA</u>	<u>-</u>	<u>0.2</u>	<u>5.4</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>.</u>	<u>0.1</u>	<u>ASTE</u>
<u>RE-EXPORTS</u>	<u>.</u>	<u>.</u>	<u>0.1</u>	<u>0.1</u>	<u>0.1</u>	<u>.</u>	<u>0.8</u>	<u>3.5</u>	<u>5.7</u>	<u>RAVITAILLEMENT NAVIRES</u>
<u>TOTAL EXPORTS</u> *****	100.0 *****	100.0 *****	100.0 *****	100.0 *****	100.0 *****	100.0 *****	100.0 *****	100.0 *****	<u>100.0</u> *****	<u>EXPORTATIONS TOTALES</u> *****

. Too small to be expressed/valeur insignifiante

^{1/} Excludes Mayotte
 A l'exclusion de Mayotte

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.7

DIRECTION OF TRADE: IMPORTS BY COUNTRY OF ORIGIN, C.I.F. VALUE, 1968-1976
 REPARTITION DU COMMERCE EXTERIEUR: IMPORTATIONS PAR PAYS D'ORIGINE, VALEUR C.A.F., 1968-1976
 (in millions of CFAF)
 (en millions de FCFA)

	1968	1969	1970	1971	1972	1973	1974	1975	1976 1/	
<u>E.E.C.</u>	863.8	1,091.3	1,326.2	1,663.4	1,441.7	1,696.1	2,651.5	2,811.1	1,050.4	<u>C.E.E.</u>
France	789.6	1,007.1	1,233.7	1,405.0	1,276.2	1,540.5	2,310.3	2,538.5	899.8	France
Reunion	4.4	5.3	2.6	9.8	12.4	20.0	27.3	92.9	59.2	Réunion
Belgium-Luxembourg	12.5	7.3	10.3	12.1	9.7	9.8	23.2	13.9	6.0	Belgique-Luxembourg
Netherlands	14.4	36.0	30.6	35.1	47.5	33.9	65.7	56.8	48.5	Pays-Bas
Germany, Federal Republic of	12.1	14.9	24.1	14.0	25.0	28.1	113.7	40.0	15.3	République Fédérale d'Allemagne
Italy	12.1	11.4	15.8	14.2	50.4	27.9	72.1	43.1	6.2	Italie
United Kingdom	16.8	6.8	5.4	33.9	13.0	23.6	21.2	13.0	9.2	Royaume-Uni
Denmark	1.9	2.5	4.4	4.3	7.5	12.3	17.9	12.8	6.2	Danemark
<u>E.F.T.A.</u>	7.7	9.2	6.4	5.9	56.0	8.1	7.1	13.5	32.0	<u>A.E.L.E.</u>
Norway	0.2	0.3	-	0.2	46.9	0.5	-	0.4	0.5	Norvège
Sweden	4.1	6.9	5.2	4.6	8.0	6.4	5.6	5.6	3.9	Suède
Switzerland	2.8	1.7	0.9	0.9	0.7	1.1	0.9	7.5	27.6	Suisse
Other	0.6	0.3	0.3	0.2	0.4	-	0.5	-	-	Divers
<u>REST OF EUROPE</u>	5.7	3.6	6.1	8.3	8.7	18.6	13.9	14.8	0.4	<u>RESTE DE L'EUROPE</u>
Spain	3.4	3.3	5.1	7.3	7.7	15.0	8.5	4.0	-	Espagne
Czechoslovakia	0.8	0.3	0.3	0.3	0.4	1.8	1.4	4.6	0.4	Tchécoslovaquie
Hungary	1.1	-	-	-	0.6	1.3	-	2.6	-	Hongrie
Bulgaria	-	-	-	-	-	0.5	3.0	3.6	-	Bulgarie
Other	0.4	-	0.7	0.7	-	-	-	-	-	Divers
<u>AFRICA</u>	836.7	931.3	960.6	772.1	943.1	974.7	1,597.9	1,215.6	1,247.3	<u>AFRIQUE</u>
Fr. Terr. of Afars & Issas	1.5	-	1.7	1.1	3.0	21.2	20.5	9.9	1.0	T.F.A.I.
Kenya	77.2	66.2	82.5	87.7	108.6	118.1	392.5	379.9	387.7	Kenya
Tanzania	9.2	13.0	18.2	11.3	4.4	0.9	8.4	30.2	20.7	Tanzanie
Madagascar	741.0	837.3	837.6	619.0	778.8	743.5	1,089.4	706.2	703.4	Madagascar
Mauritius	0.1	0.4	1.1	8.2	6.0	9.8	28.5	20.9	77.8	Ile Maurice
South Africa	-	7.4	11.3	36.7	26.5	64.1	44.4	56.7	49.5	Afrique du Sud
Morocco	2.4	5.4	6.3	7.4	14.7	14.1	11.0	10.0	5.9	Maroc
Algeria	0.4	0.8	1.2	0.3	0.4	1.0	2.6	1.8	0.3	Algérie
Gabon	0.4	0.2	0.6	0.1	-	1.2	-	-	-	Gabon
Other	4.5	0.6	0.1	0.3	2.7	0.8	0.6	-	1.0	Divers
<u>AMERICA</u>	0.5	0.4	0.8	5.5	11.8	3.7	4.5	2.5	1.2	<u>AMERIQUE</u>
U.S.A.	0.5	0.4	0.8	5.5	11.8	3.7	4.5	2.5	1.2	Etats-Unis
<u>ASIA</u>	48.0	52.6	71.2	379.0	387.2	667.0	1,928.9	916.3	713.6	<u>ASIE</u>
Kuwait	-	-	-	-	0.7	4.7	-	12.0	353.2	Koweït
Iran	0.3	-	-	-	-	-	-	-	-	Iran
Pakistan	1.8	1.3	2.0	-	-	574.3	388.3	428.8	340.4	Pakistan
India	3.4	3.1	2.8	2.4	1.4	0.8	5.8	2.9	-	Inde
Thailand	-	-	-	309.6	277.3	0.3	491.5	309.2	-	Thaïlande
Macao	-	-	-	-	-	1.0	0.3	-	-	Macao
Singapore	-	-	-	-	-	2.8	-	-	-	Singapour
China	11.3	13.9	13.8	33.9	68.2	49.1	997.5	111.0	2.8	Chine
Japan	19.4	18.2	34.1	18.9	30.7	24.1	39.7	37.4	14.1	Japon
Thailand	2.4	2.2	7.8	2.3	1.7	0.7	-	0.5	-	Formose
Hong-Kong	4.9	8.0	7.7	10.6	8.0	4.0	3.5	12.9	0.6	Hong-Kong
Other	4.5	10.9	3.7	1.3	2.9	5.2	2.3	1.6	2.5	Divers
<u>AUSTRALIA</u>	0.6	0.2	0.6	0.5	-	0.6	-	0.6	0.6	<u>AUSTRALIE</u>
UNALLOCATED	-	-	-	-	81.1	-	-	-	-	NON-ALLOUÉS
TOTAL IMPORTS	1,761.0	2,091.7	2,373.3	2,834.7	2,932.3	3,367.9	6,202.9	4,974.5	3,045.5	IMPORTATIONS TOTALES
1/ Excludes Mayotte										
À l'exclusion de Mayotte										

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.8

DIRECTION OF TRADE: IMPORTS BY COUNTRY OF ORIGIN, C.I.F. VALUE, 1968-1976
 REPARTITION DU COMMERCE EXTERIEUR: IMPORTATIONS PAR PAYS D'ORIGINE, VALEUR C.A.F., 1968-1976
 (in percent)
 (en pourcentage)

	1968	1969	1970	1971	1972	1973	1974	1975	1976 1/	
<u>E.E.C.</u>	<u>49.0</u>	<u>52.2</u>	<u>55.9</u>	<u>58.7</u>	<u>49.2</u>	<u>50.3</u>	<u>42.7</u>	<u>56.5</u>	<u>34.5</u>	<u>C.E.E.</u>
France	44.8	48.1	52.0	49.6	43.5	45.7	37.2	51.0	29.5	France
Netherlands	0.8	1.7	1.3	1.2	1.6	1.0	1.1	1.1	1.6	Pays-Bas
Germany, Fed. Rep. of	0.7	0.7	1.0	0.5	0.9	0.8	1.8	0.8	0.5	République Fédérale d'Allemagne
Italy	0.7	0.5	0.7	5.3	1.7	0.8	1.2	0.9	0.2	Italie
United Kingdom	1.0	0.3	0.2	1.2	0.4	0.7	0.3	0.3	0.3	Royaume-Uni
Other	1.0	0.9	0.7	0.9	1.0	1.3	1.1	2.4	2.4	Divers
<u>E.F.T.A. AND REST OF EUROPE</u>	<u>0.8</u>	<u>0.6</u>	<u>0.6</u>	<u>0.5</u>	<u>2.2</u>	<u>0.8</u>	<u>0.3</u>	<u>0.6</u>	<u>1.1</u>	<u>A.E.L.E. ET RESTE DE L'EUROPE</u>
<u>AFRICA</u>	<u>47.5</u>	<u>44.5</u>	<u>40.5</u>	<u>27.2</u>	<u>32.2</u>	<u>28.9</u>	<u>25.8</u>	<u>24.4</u>	<u>41.0</u>	<u>AFRIQUE</u>
Kenya	4.4	3.2	3.5	3.1	3.6	3.5	6.3	7.6	12.7	Kenya
Madagascar	42.0	40.0	35.3	21.8	26.6	22.1	17.6	14.2	23.1	Madagascar
Mauritius	.	.	.	0.3	0.2	0.3	0.5	0.4	2.6	Ile Maurice
South Africa	.	0.4	0.5	1.3	0.9	1.9	0.7	1.1	1.6	Afrique du Sud
Tanzania	0.5	0.6	0.8	0.4	0.2	.	0.1	0.6	0.7	Tanzanie
Other	0.6	0.3	0.4	0.3	0.7	.	0.6	0.5	0.3	Divers
<u>AMERICA</u>	<u>.</u>	<u>.</u>	<u>.</u>	<u>0.2</u>	<u>0.4</u>	<u>0.1</u>	<u>0.1</u>	<u>0.1</u>	<u>.</u>	<u>AMERIQUE</u>
<u>ASIA</u>	<u>2.7</u>	<u>2.7</u>	<u>3.0</u>	<u>13.4</u>	<u>13.2</u>	<u>19.8</u>	<u>31.1</u>	<u>18.4</u>	<u>23.4</u>	<u>ASIE</u>
Kuwait	.	.	.	.	.	.	.	.	11.6	Kuwait
Japan	1.1	0.9	1.4	0.7	1.0	0.7	0.6	0.8	0.4	Japan
Pakistan	0.1	0.1	0.1	.	.	17.0	6.3	8.6	11.2	Pakistan
China	0.6	0.7	0.6	1.2	2.9	1.5	16.1	.	0.1	China
Thailand	0.2	.	.	10.9	9.5	.	7.9	6.2	.	Thaïlande
Other	0.7	1.0	0.9	0.6	0.4	0.6	0.2	0.6	0.1	Divers
UNALLOCATED	.	.	.	.	2.8	.	.	.	.	NON-ALLOUES
TOTAL IMPORTS	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	IMPORTATIONS TOTALES

. too small to be expressed/valeur insignifiante

1/ Excludes Mayotte
 A l'exclusion de Mayotte

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.9

COMMODITY EXPORTS, FOB UNIT PRICE PER KG., 1968-1976
 EXPORTATIONS DE MARCHANDISES, COURS UNITAIRE FOB PER KG., 1968-1976
 (in CFAF/en FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	
Essences of ylang-ylang										Essences d'ylang-ylang
Extra	9,298	8,829	8,843	9,088	9,289	9,906	13,247	14,359	15,252	Extra
First quality	6,133	6,035	5,983	6,112	5,970	7,154	9,412	10,922	9,746	Première qualité
Second quality	3,536	3,576	3,618	3,874	3,883	4,191	6,809	7,199	7,648	Deuxième qualité
Third quality	2,704	2,796	2,742	2,881	2,892	3,002	5,117	5,427	5,416	Troisième qualité
Condensed	10,345	10,546	9,854	11,029	10,967	11,008	15,865	17,231	17,699	Concrète
Essence of jasmine	85,906	82,817	70,039	69,874	68,103	70,455	81,863	196,269	203,704	Essence de jasmin
Essence of basil	5,093	4,950	6,578	7,511	6,725	5,205	9,091	14,615	12,958	Essence de basilic
Essence of palmarosa	4,402	4,691	5,000	4,729	4,397	3,491	5,246	7,353	4,762	Essence de palmarosa
Vanilla	2,524	2,790	2,805	2,932	2,965	2,915	2,947	3,267	3,748	Vanille
Copra	42	40	45	52	37	47	119	74	53	Coprah
Gloves	282	671	803	720	815	727	975	1,043	923	Girofle
Sisal	28	35	32	33	-	-	-	-	-	Sisal
Cocoa	205	222	179	138	115	156	364	286	477	Cacao
Coffee	164	180	220	211	213	215	244	230	549	Café
Cinnamon	105	214	155	160	176	215	235	220	267	Gannelle
Lava gravel (per metric ton)	871	871	880	877	974	1,263	-	-	-	Pouzzolane (par tonne)

Source: Service des Douanes, Ministère des Finances

Table/Tableau 3.10
EXPORT PRICE INDICES FOR SELECTED COMMODITIES, 1968-1976
INDICES DES PRIX A L'EXPORTATION DES PRINCIPAUX PRODUITS, 1968-1976
 (1970=100; based on export prices f.o.b. in CFAF/
 basés sur les prix f.o.b. en FCFA)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^{1/}	
Essences of ylang-ylang										Essences d'ylang-ylang
Extra	105.1	99.8	100.0	102.8	105.0	112.0	149.8	162.4	172.5	Extra
First quality	102.5	100.9	100.0	102.2	99.8	119.6	157.3	182.5	162.9	Première qualité
Second quality	97.7	98.8	100.0	107.1	107.3	115.8	188.2	199.0	211.4	Deuxième qualité
Third quality	98.6	102.0	100.0	105.1	105.5	109.5	186.8	197.9	197.5	Troisième qualité
Condensed	105.0	107.0	100.0	111.9	111.3	111.7	161.0	174.9	179.6	Concrète
Essence of jasmine	122.7	118.2	100.0	99.8	97.2	100.6	116.9	280.1	290.8	Essence de jasmin
Essence of basil	77.6	75.3	100.0	114.3	102.3	79.1	138.2	222.3	197.0	Essence de basilic
Essence of palmarosa	88.0	93.8	100.0	94.6	87.9	69.8	104.9	147.1	95.2	Essence de palmarosa
Vanilla	89.9	99.4	100.0	104.4	105.7	103.8	105.1	116.4	133.6	Vanille
Copra	93.3	88.9	100.0	115.6	82.4	104.4	264.4	164.4	117.8	Coprah
Cloves	35.2	83.5	100.0	89.6	101.6	90.5	121.4	129.9	114.9	Girofle
Sisal	87.5	109.4	100.0 ¹	103.2	-	-	-	-	-	Sisal
Cocoa	114.5	124.0	100.0	77.1	64.2	87.2	203.4	159.8	266.5	Cacao
Coffee	74.5	82.0	100.0	95.8	96.8	97.7	110.9	104.6	249.5	Café
Cinnamon	67.7	138.1	100.0	103.1	113.5	138.8	151.6	141.9	172.2	Cannelle
Construction material (lava gravel)	99.0	99.0 ^c	100.0	99.7	110.7	143.5	-	-	-	Pouzzolane
<u>Total exports</u>	<u>89.6</u>	<u>98.4</u>	<u>100.0</u>	<u>104.8</u>	<u>103.3</u>	<u>98.1</u>	<u>148.6</u>	<u>144.9</u>	<u>146.2</u>	<u>Exportations Totales</u>

^{1/} Excludes Mayotte/A l'exclusion de Mayotte

Source: Service des Douanes, Ministère des Finances and mission calculations/et calculs de la mission

Table/Tableau 3.11

INDICES OF QUANTITIES EXPORTED, 1968-1975
INDICES DES QUANTITES EXPORTEES, 1968-1975
(1970 = 100)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	
Essences of ylang-ylang										Essence d'ylang-ylang
Extra	112.0	111.9	100.0	107.6	136.9	155.5	132.2	80.3	95.5	Extra
First quality	167.2	78.6	100.0	170.7	252.4	264.2	274.1	190.4	150.9	Première qualité
Second quality	95.6	66.1	100.0	61.9	135.7	162.1	149.6	44.5	58.5	Deuxième qualité
Third quality	96.3	93.2	100.0	89.1	134.7	121.4	133.2	85.3	111.3	Troisième qualité
Condensed	10.6	100.4	100.0	99.3	196.4	315.0	280.7	237.2	82.5	Concrète
Essence of jasmine	116.0	138.1	100.0	93.0	90.3	68.5	79.4	52.1	10.5	Essence de jasmin
Essence of basil	78.7	37.1	100.0	216.9	72.0	30.2	58.8	46.4	37.4	Essence de basilic
Essence of palmarosa	82.0	75.0	100.0	94.0	90.6	143.2	111.2	37.8	68.1	Essence de palmarosa
Other essences	176.9	204.2	100.0	154.4	179.9	312.9	189.7	54.2	96.7	Autres essences
Vanilla	96.3	144.1	100.0	143.8	144.1	23.9	111.7	146.8	86.1	Vanille
Copra	95.0	120.5	100.0	91.3	55.5	111.9	95.6	28.8	53.1	Coprah
Cloves	32.0	31.5	100.0	134.5	73.0	43.5	89.6	202.6	317.3	Girofle
Sisal	182.8	111.9	100.0	44.7	-	-	-	-	-	Sisal
Cocoa	87.4	105.8	100.0	33.2	103.4	40.0	80.0	43.7	22.2	Cacao
Coffee	38.1	41.7	100.0	71.1	98.8	41.3	37.2	59.3	30.9	Café
Cinnamon	28.6	57.1	100.0	137.1	250.5	175.3	88.4	8.0	1.3	Cannelle
Construction material (lava gravel)	110.9	97.8	100.0	108.5	116.6	26.9	-	-	-	Pouzzolane
<u>Total Exports</u>	<u>88.2</u>	<u>102.6</u>	<u>100.0</u>	<u>117.5</u>	<u>114.5</u>	<u>88.3</u>	<u>112.7</u>	<u>110.0</u>	<u>119.1</u>	<u>Exportations totales</u>

Table/Tableau 3.12

PRICE AND QUANTUM INDICES FOR SELECTED IMPORT ITEMS, 1968-1976
INDICES DES PRIX ET QUANTITES DE CERTAINS PRODUITS IMPORTES, 1968-1976
(1970 = 100)

	1968	1969	1970	1971	1972	1973	1974	1975	1976 ^{1/2/}	Jan.-Aug. 1976 ^{1/2/}	
<u>Food</u>											<u>Alimentation</u>
Rice in constant 1975 prices (mill.CFAF)	762.0	781.2	887.2	1,424.3	1,019.4	857.0	1,177.1	739.0	462.2	78.2	Riz aux prix constants de 1975 (millions FCFA)
Quantum index	85.9	88.1	100.0	160.5	114.9	98.6	132.7	83.3	78.2	78.2	Indice des quantités
Price index	106.2	104.9	100.0	86.2	86.9	131.2	308.0	194.9	143.9	143.9	Indice des prix
Wheat flour in constant 1975 prices (mill.CFAF)	90.1	72.2	98.8	165.8	93.8	105.8	105.2	92.0	36.9	56.0	Farine aux prix constants de 1975 (millions FCFA)
Quantum index	91.2	73.0	100.0	167.8	94.9	107.1	106.5	93.1	56.0	56.0	Indice des quantités
Price index	106.8	98.2	100.0	106.8	110.6	124.3	233.4	253.2	247.1	247.1	Indice des prix
Condensed milk in constant 1975 prices (mill.CFAF)	51.8	75.8	88.4	85.6	87.7	81.9	109.1	92.0	28.6	48.6	Lait condensé aux prix constants de 1975 (millions FCFA)
Quantum index	58.6	85.7	100.0	96.8	99.2	92.6	123.4	104.1	48.6	48.6	Indice des quantités
Price index	98.6	90.8	100.0	101.0	114.3	124.8	153.0	196.5	206.1	206.1	Indice des prix
<u>Textiles</u>											<u>Textiles</u>
Textiles and clothing in constant 1975 prices (mill.CFAF)	361.0	443.7	523.6	487.8	457.5	554.0	613.2	452.0	272.9	78.2	Textiles et vêtements aux prix constants de 1975 (millions FCFA)
Quantum index	68.9	81.7	100.0	93.2	87.4	105.8	117.1	86.3	78.2	78.2	Indice des quantités
Price index	81.9	91.3	100.0	112.4	109.7	109.2	144.6	198.4	144.1	144.1	Indice des prix
<u>Petroleum products</u>											<u>Produits pétroliers</u>
Gasoline in constant 1975 prices (mill.CFAF)	88.2	80.2	82.1	94.4	123.3	126.7	247.9	155.7	90.6	165.6	Essence aux prix constants de 1975 (millions FCFA)
Quantum index	107.5	97.7	100.0	115.0	150.2	154.4	301.9	189.6	165.6	165.6	Indice des quantités
Price index	96.2	92.3	100.0	98.6	117.8	108.2	217.8	274.0	317.5	317.5	Indice des prix
Heavy oil in constant 1975 prices (mill.CFAF)	80.9	96.1	117.9	118.5	153.6	137.0	183.0	116.0	95.9	122.0	Gas-oil aux prix constants de 1975 (millions FCFA)
Quantum index	68.6	81.5	100.0	100.5	130.3	116.2	155.2	98.4	122.0	122.0	Indice des quantités
Price index	98.1	97.0	100.0	101.6	107.1	120.0	232.1	274.0	283.3	283.3	Indice des prix
<u>Intermediate goods</u>											<u>Matières premières et demi-produits</u>
Cement in constant 1975 prices (mill.CFAF)	101.8	115.6	128.7	132.1	161.4	101.5	354.0	250.1	58.6	68.3	Ciment aux prix constants de 1975 (millions FCFA)
Quantum index	79.1	89.8	100.0	102.6	125.4	78.9	275.1	194.3	68.3	68.3	Indice des quantités
Price index	79.7	89.9	100.0	108.1	119.0	111.3	143.6	176.4	222.8	222.8	Indice des prix
Iron bars in constant 1975 prices (mill.CFAF)	64.9	52.3	62.7	56.3	50.2	83.3	97.3	83.0	12.8	30.6	Barres de fer aux prix constants de 1975 (millions FCFA)
Quantum index	103.5	83.4	100.0	89.8	80.1	132.9	155.2	132.4	30.6	30.6	Indice des quantités
Price index	67.6	69.0	100.0	91.9	90.6	97.8	148.3	156.7	159.3	159.3	Indice des prix
<u>Capital goods</u>											<u>Biens d'investissement</u>
Industrial vehicles in constant 1975 prices	51.7	36.3	59.4	81.7	53.1	47.2	78.5	98.0	20.4	51.5	Véhicules industriels aux prix constants de 1975 (millions FCFA)
Quantum index	87.0	61.1	100.0	137.5	89.4	79.5	132.2	165.0	51.5	51.5	Indice des quantités
Price index	93.1	96.0	100.0	106.6	104.2	117.2	138.3	102.5	135.7	135.7	Indice des prix
Total imports in constant 1975 prices (mill.CFAF)	1,081.6	1,164.5	1,698.8	4,616.8	4,649.0	4,411.9	5,657.9	4,273.6	2,248.2	91.1	Importations totales aux prix constants de 1975 (millions FCFA)
Quantum index	83.3	85.6	100.0	123.8	124.8	119.3	153.0	134.5	91.1	91.1	Indice des quantités
Price index	89.2	103.0	100.0	95.7	98.3	119.0	170.9	155.8	117.5	117.5	Indice des prix
<u>Terms of Trade</u>	100.5	95.5	100.0	109.5	105.1	82.4	87.0	93.0	116.6	116.6	<u>Termes de l'échange</u>

1/ Excludes Mayotte
A l'exclusion de Mayotte

2/ Quantum indices of 1976 adjusted on a yearly basis
Les indices des quantités de 1976 ont été ajustés sur une base annuelle

Source: Service des Douanes, Ministère des Finances, and mission calculations/et calculs de la mission

Table/Tableau 4.1

SERVICE PAYMENTS ON PUBLIC DEBT OUTSTANDING DECEMBER 31, 1976
 SERVICE DE LA DETTE PUBLIQUE EXTERIEURE PAR RAPPORT A L'ENCOURS
 DE LA DETTE AU 31 DECEMBRE 1976

(in millions of US dollars / en millions de dollars EU)

<u>Debt outstanding at beginning of period</u>		<u>Transactions during period</u>				
<u>Encours de la dette au début de la période</u>		<u>Transactions au cours de la période</u>				
<u>Disbursed only</u>	<u>Including undisbursed</u>	<u>Disbursements</u>	<u>Repayment of principal</u>	<u>Interest payments</u>	<u>Total debt service</u>	
<u>Versements effectués</u>	<u>Y compris solde non-prélevé</u>	<u>Prélèvements</u>	<u>Amortissements</u>	<u>Paiements d'intérêts</u>	<u>Total du service de la dette</u>	
1977	17.4	32.2	6.4	0.4	0.1	0.6
1978	23.4	31.8	2.6	0.6	0.2	0.8
1979	25.5	31.2	2.4	0.6	0.2	0.8
1980	27.3	30.6	2.3	0.5	0.2	0.7
1981	29.0	30.1	1.0	0.5	0.2	0.7
1982	29.5	29.5	-	0.5	0.2	0.7
1983	29.0	29.0	-	0.5	0.1	0.6
1984	28.5	28.5	-	0.5	0.1	0.6
1985	28.0	28.0	-	0.3	0.1	0.4
1986	27.7	27.7	-	2.1	0.1	2.1
1987	25.6	25.6	-	2.1	0.1	2.1
1988	23.6	23.6	-	2.0	0.1	2.1
1989	21.5	21.5	-	2.0	.	2.0
1990	19.5	19.5	-	1.9	.	2.0

. less than US\$ 50,000/ moins de 50.000\$E.U.

Source: Mission estimates and IBRD debt reporting system.

Estimations de la mission et système d'enregistrement de la dette extérieure (BIRD)

Table/Tableau 5.1

CENTRAL GOVERNMENT REVENUE AND EXPENDITURE 1970-75

RECETTES ET DEPENSES DE L'ETAT 1970-75

(in millions of CFA Francs/en millions de Francs CFA)

	1970	1971	1972	1973	1974	1975 ^{6/}	
A. Current Revenues							A. Recettes Courantes
Tax revenues	833.3	1012.4	1030.9	1112.9	1699.2	1543.9	Recettes des impôts
Direct taxes ^{1/}	137.8	185.1	175.3	227.3	322.9	255.2	Impôts directs
Indirect taxes	695.5	827.3	855.6	885.6	1,376.3	1,288.7	Impôts indirects
Import duties	420.4	489.4	495.9	588.5	767.3	693.5	Droits à l'importation
Excise duties	-	-	-	-	-	4.8	Droits intérieurs de consommation
Import & Export taxes	87.6	106.8	102.6	111.9	316.9	283.1	Droits sur les transactions extérieurs
Export duties	130.8	168.4	170.2	102.5	208.0	213.0	Droits à l'exportation
Other indirect taxes and duties	11.9	11.2	31.4	20.5	13.5	16.3	Autres droits et taxes
Registration and Stamp duties	28.0	31.9	34.0	33.1	39.0	50.8	Droits d'enregistrement et de timbres
Land taxes	-	-	-	5.4	6.5	2.6	Impôts fonciers
Licences and Permits	16.8	19.6	21.5	23.7	25.1	24.6	Patentes et licences
Non-tax revenues	158.3	216.1	244.6	288.8	321.9	171.3	Recettes non-fiscales
Property revenue	18.1	14.6	16.3	15.3	42.4	18.7	Revenus du domaine
Posts and Telecommunications	56.7	74.2	74.8	82.3	101.2	57.8	Service des Postes et Télécommunications
Public works ^{2/}	68.0	87.7	110.8	178.5	104.5	51.4	Travaux publics ^{2/}
Other services ^{3/}	6.8	5.9	5.1	4.2	4.9	2.8	Recettes diverses des services ^{3/}
Other revenue	8.7	11.7	32.6	8.5	60.9	40.6	Produits divers et accidentels
Repayment of loans and advances	-	22.0	5.0	-	8.0	-	Remboursement des prêts et avances
Total Current Revenues	991.6	1,228.5	1,275.5	1,401.7	2,021.1	1,715.2	Total des Recettes Courantes
B. Current Expenditure ^{4/}							B. Dépenses Courantes
Wages & Salaries	664.1	790.0	810.2	1,007.9	1,397.0	1,141.4	Salaires
Goods & Services	415.0	471.1	562.1	583.6	739.1	781.7	Biens et services
Transfers & Subsidies	83.9	154.7	171.9	147.4	197.7	489.2	Transferts et subventions
Public debt service	31.9	29.0	27.0	12.7	64.3	61.5	Service de la dette publique
Total Current Expenditure	1,194.9	1,444.8	1,571.2	1,751.6	2,398.1	2,473.8	Total des Dépenses Courantes
C. Current Deficit	203.3	216.3	295.7	349.9	377.0	758.6	C. Déficit du Compte Courant
D. Capital Account Revenues ^{5/}	60.6	82.5	185.4	163.1	256.8	95.5	D. Recettes du Compte en Capital
E. Capital Expenditures ^{5/}							E. Dépenses en Capital
Public works and buildings	255.5	289.9	435.3	579.0	962.6	528.1	Travaux publics et bâtiments
Other	10.0	10.0	-	50.0	100.0	74.7	Autres
F. Overall Budget Deficit	408.2	433.7	545.6	815.8	1,182.8	1,265.9	F. Déficit Budgétaire Global

^{1/} Personal progressive income tax receipts, including all recoveries of direct taxes outstanding from earlier years.
Impôts personnels et progressifs sur le revenu y compris recouvrements des impôts directs des exercices antérieurs.

^{2/} From the annexed public works budget (maintenance works miscellaneous receipts and payments from previous years).
Tirés du Budget annexe des travaux publics (seulement travaux d'entretien, recettes diverses, prestations et recettes des exercices antérieurs).

^{3/} Including 0.9 million CFAF for visa fees.
Y inclus 0.9 million CFAF de taxes sur les visas.

^{4/} Including the annexed public works budget (maintenance works only)
Y compris Budget annexe des travaux publics (travaux d'entretien seulement)

^{5/} Including the annexed public works budget (new works)
Y compris Budget annexe des travaux publics (travaux neufs).

^{6/} Excludes Mayotte after July 3, 1975.
Y exclus Mayotte après le 3 juillet 1975.

Source: Ministry of Finance/Ministère des Finances.

Table/Tableau 5.2

1/
 RECURRENT GOVERNMENT EXPENDITURE BY FUNCTION 1970-75
 DEPENSES COURANTES DE L'ETAT 1/ PAR SERVICE 1970-75

(in millions of CFA Francs/en millions de Francs CFA)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	
Agriculture	44.8	52.5	54.6	55.0	62.1	64.1	Agriculture
Education	198.7	249.8	318.4	370.6	515.3	503.7	Education
Health	189.8	231.4	226.5	237.7	273.5	248.0	Santé
Industry and Commerce	1.0	6.1	4.8	4.9	6.2	7.0	Industrie et commerce ^e
Public works	153.5	134.2	174.6	232.1	331.1	355.3	Travaux publics
Administrative and other services	542.5	654.4	703.2	809.6	1,106.5	914.7	Services administratifs et autres
Public debt service	31.9	29.0	27.0	12.7	64.3	61.5	Service de la dette publique
Unallocated	32.7	87.4	62.1	29.0	39.1	319.5	Non-allouées
<u>Total</u>	<u>1,194.9</u>	<u>1,444.8</u>	<u>1,571.2</u>	<u>1,751.6</u>	<u>2,398.1</u>	<u>2,473.8</u>	

e = estimated/estimation

1/ Excluding intra budgetary transfers and new public works of the annexed public works budget; excludes Mayotte after July 3, 1975.
 Non compris les transferts intra-budgétaires et les travaux neufs du budget annexe des travaux publics; y exclus Mayotte après le 3 juillet 1975.

Source: Ministry of Finance/Ministère des Finances

Table/Tableau 5.3

GOVERNMENT BUDGET SUMMARY, 1970-1976 ^{5/}

RESUME DE LA SITUATION DU BUDGET DE L'ETAT, 1970-1976 ^{5/}

(in millions of CFAF/en millions de Francs CFA)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u> ^P	
<u>Domestic Receipts</u>								<u>Recettes Internes</u>
Ordinary Budget	923.6	1,140.8	1,164.7	1,223.2	1,916.6	1,663.8	2,400 ^{4/}	Budget de fonctionnement
Public Works Annexed Budget	128.6	170.2	296.2	341.6	361.3	146.9	-	Budget annexe des travaux publics
Total Domestic Receipts ^{1/}	1,052.2	1,311.0	1,460.9	1,564.8	2,277.9	1,810.7	2,400	Total des Recettes Internes ^{1/}
<u>Expenditure</u>								<u>Dépenses</u>
Ordinary Budget	1,124.1	1,400.8	1,492.9	1,623.2	2,194.8	2,246.3	3,400	Budget de fonctionnement
Public Works Annexed Budget	226.6	192.5	323.1	419.8	708.4	655.4	-	Budget annexe des travaux publics
Investment Budget	109.7	151.4	190.5	337.6	557.5	174.9	1,500	Budget d'Equipement et d'investissement
Total Expenditure ^{2/}	1,460.4	1,744.7	2,006.5	2,380.6	3,460.7	3,076.6	4,900	Total des dépenses ^{2/}
Budget Deficit	408.2	433.7	545.6	815.8	1,182.8	1,265.9	2,500	Déficit budgétaire
<u>Financing</u>								<u>Financement</u>
French Budgetary Aid	395.2	461.8	387.8	503.9	751.0	397.1	-	Aide budgétaire française
CCCE, CDC & CAECL Loans ^{3/}	-	-	13.6	55.0	144.7	6.7	-	Prêts des CCCE, CDC et CAECL ^{3/}
Reserve Fund	83.3	83.7	181.8	119.7	13.1	-	-	Caisse de réserve
Other Foreign Borrowing & Grants	-	-	-	-	-	-	2,500	Autres prêts et dons de l'extérieur
Use of Treasury Resources	- 70.3	- 111.8	- 37.6	137.2	274.0	862.1	-	Utilisation des disponibilités du Trésor

P = Provisional/Provisoire

^{1/} Excludes external aid receipts, intra-budget transfers, drawings from the reserve fund and funds carried forward from previous years.
Non-compris les recettes des aides extérieures, transferts intra-budgétaires, fonds de la caisse de réserve et report des exercices antérieurs.

^{2/} Excludes all expenditure met directly by France and intra-budget transfers.
Non-compris toutes dépenses financées directement par l'Etat français et les transferts intra-budgétaires.

^{3/} Caisse Centrale de Coopération Economique, Caisse de Dépôts et des Consignations, Caisse d'Aide à l'Equipement des Collectivités Locales.

^{4/} Including the recovery of 600 million CFAF in loans and advances, mainly to parastatal organizations.
Y inclus le recouvrement de 600 millions FCFA au titre de prêts et avances dont la plupart accordés aux organisations para-étatiques.

^{5/} Excludes Mayotte after July 6, 1975
A l'exclusion de Mayotte après le 6 juillet 1975

Source: Ministry of Finance/Ministère des Finances.

Table/Tableau 5.4

REVENUE AND EXPENDITURE FOR EXTRA-BUDGETARY ACCOUNTS, 1975

RECETTES ET DEPENSES DES COMPTES HORS BUDGET, 1975

(in millions of CFAF; en millions de Francs CFA)

	<u>Revenue</u> <u>Recettes</u>	<u>Expenditure</u> <u>Dépenses</u>	<u>Surplus</u> <u>Excédent</u>	
Communes	19.2	16.1	3.1	Communes
Municipalities	40.8	32.4	8.4	Circonscriptions
Chamber of Commerce	94.7	59.2	35.5	Chambre de Commerce
Road Fund	95.3	37.1	58.2	Fonds Routiers
Total	250.0	144.8	105.2	Total

Source: Ministry of Finance
Ministère des Finances

Table/Tableau 5.5

EXTERNAL AID DISBURSEMENTS 1970-76

VERSEMENTS DE L'AIDE EXTERIEURE 1970-76

(in million of CFA Francs; en millions de Francs CFA)

	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u> ^{4/}	<u>1976</u> ^{4/}	
A. France								A. France
Grant-in-aid Ordinary Budget	395	462	388	504	751	397	-	Subvention: Budget de fonctionnement
Grant-in-aid Investment Budget	21	40	17	70	124	6	-	Subvention: Budget d'équipement
Expenditures met directly by France	1,506	1,758	2,477	3,336	4,058	4,385	-	Dépenses financées directement par la France
Rice Subsidy	-	-	-	-	695	7	535 ^{3/}	Subvention: riz
FIDES grants	23	521	693	893	182	542	-	Dons de FIDES
CCCE ^{1/} loans to Government	-	-	14	36	133	37	-	Prêts de CCCE ^{1/}
CDC/CAECL loans ^{2/}	-	-	-	55	12	-	-	Prêts de CDC/CAECL ^{2/}
B. European Development Fund	300	170	10	125	25	705	..	B. Fonds Européens de Développement
C. China: Supplies Credit	-	-	-	-	-	-	315	C. Chine: Crédit fournisseurs
D. Special Arab Aid Fund for Africa	-	-	-	-	-	-	2,505	D. Fonds Spécial Arabe d'Aide à l'Afrique
E. Kuwait Fund	-	-	-	-	-	-	<u>500</u> ^e	E. Fonds Koweït
Total	2,245	2,951	3,599	5,019	5,980	6,072	3,855	Total

g/ = Estimation .. = not available/non disponible

^{1/} Caisse Centrale de Coopération Economique

^{2/} Caisse des Dépôts et des Consignations, Caisse d'Aide à l'Equipement des Collectivités Locales

^{3/} Figure relates to subsidy provided in 1975; ce chiffre se réfère à la subvention du prix du riz en 1975.

^{4/} Excludes Mayotte after July 3, 1975

A l'exclusion de Mayotte apres le 3 juillet 1975

Source: Ministère des Départements et Territoires d'Outre-Mer (Paris), Institut d'Emission et Ministère des Finances (Moroni)

These data differ from the data on financial flows published by OECD (DAG).

Ces chiffres ne correspondent pas exactement à ceux des flux financiers publiés par l'OCDE (CAD).

Table/Tableau 5.6

INVESTMENT EXPENDITURE COMMITMENTS APPROVED BY FIDES ^{1/} 1970-1974

PROGRAMMES D'INVESTISSEMENT AUTORISES PAR LE FIDES 1970-1974

(in millions of CFAF/en millions de Francs CFA)

<u>Sector</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1970-74</u>	<u>Branche</u>
Agriculture	112	139	150	148	115	664	Agriculture
Livestock	8	10	7	10	14	49	Elevage
Forestry and Water Development	15	10	7	10	17	59	Eaux et Forêts
Fishing	-	-	-	-	5	5	Pêche
Tourism	-	-	-	5	-	5	Tourisme
Power	-	15	14	31	31	91	Electricité
Roads	44	88	207	155	34	528	Routes et Ponts
Ports	-	-	-	24	35	59	Ports
Air Fields	40	68	18	32	-	158	Aérodromes
Telecommunications	14	8	6	88	-	116	Transmissions
Health	49	54	49	59	30	241	Santé
Education	60	15	89	106	96	366	Enseignement
Other	33	36	82	83	120	354	Autres
Total	375	443	629	751	497	2,695	Total

1/ Fonds d'investissements pour le développement économique et social (France)

Source: Annuaire Statistique 1974; Bureau d'Etudes Economiques et Statistiques

Table/Tableau 6.1

DISTRIBUTION OF SHORT-TERM CREDIT BY BANQUE COMMERCIALE DES COMORES TO THE PRIVATE SECTOR
 VENTILATION DU CREDIT A COURT TERME ACCORDE PAR LA BANQUE COMMERCIALE DES COMORES AU SECTEUR PRIVE
 (outstanding end of period in millions of CFPA
 encours en fin de période, en millions de FCFA)

	1975		1976										1977	
	June	December	January	February	March	April	May	June	July	August	December	April		
Agriculture	54.4	188.9	123.9	114.1	113.0	74.7	51.2	57.4	292.5	417.9	302.5	240.2	Agriculture	
Trade	977.9	1,768.3	1,698.9	1,038.9	869.1	670.0	543.0	662.3	565.5	467.4	656.9	686.3	Commerce	
of which:													dont:	
- Vanilla export credit	(207.3)	(184.3)	(..)	(170.2)	(101.3)	(16.3)	(18.7)	(5.4)	(5.5)	(..)	(99.2)	(-)	- Exportations vanille	
- Rice import credit	(596.6)	(493.1)	(..)	(19.8)	(4.0)	(34.6)	(1.1)	(155.1)	(35.0)	(..)	(12.2)	(207.8)	- Importations riz	
Public Works and Construction	201.8	88.5	88.5	100.3	81.9	66.3	15.6	15.9	16.1	7.1	97.0	29.5	Travaux Publics et Bâtiments	
Hotels and Restaurants	7.5	15.3	14.4	14.1	12.6	13.2	12.5	13.4	11.9	2.2	2.5	3.4	Hôtellerie	
Transport	77.8	29.2	11.1	12.7	20.0	16.2	19.9	18.0	16.3	13.0	13.5	10.9	Transports	
Services	1.5	9.8	11.5	11.5	8.8	7.6	6.7	6.0	5.8	5.5	8.9	3.8	Services	
Industry	563.5	3.0	3.8	4.1	1.6	3.6	3.0	5.7	5.5	3.5	15.7	27.5	Industrie	
Other	43.2	15.3	14.7	13.3	10.2	8.8	7.8	7.3	7.2	7.2	21.9	10.5	Divers	
Total	1,927.7	2,118.3	1,966.8	1,309.0	1,117.1	860.4	659.7	786.0	920.8	923.8	1,118.9	1,012.1	Total	

.. not available/non disponible

Source: Banque Commerciale des Comores

Table/Tableau 6.2 1/
 DISTRIBUTION OF CREDIT BY CREDICOM 1/
 VENTILATION DU CREDIT ACCORDE PAR CREDICOM
 (outstanding, end of period; in millions of CFAF)
 (encours en fin de période; en millions de FCFA)

	December 1974	December 1975	September 1976	April 1977	
<u>Short-term credit</u>	<u>49.1</u>	<u>47.9</u>	<u>61.2</u>	<u>43.1</u>	<u>Crédits à court-terme</u>
Agriculture	-	-	-	9.6	Agriculture
Fishing	2.0	2.5	1.0	2.3	Pêche
Industry	-	0.3	29.0	4.3	Industrie
Trade & Transport	-	2.6	1.7	0.9	Commerce et Transports
Hotels & Restaurants	0.3	0.1	.	-	Hôtellerie
Craftsmen	0.8	2.1	1.4	1.4	Artisanat
Construction	5.1	7.0	2.1	1.6	Habitat
Building materials	7.7	8.2	9.6	8.2	Matériaux de construction
Vehicles	31.2	23.1	14.9	13.5	Automobiles
Small plant	2.0	2.0	1.4	1.3	Petit équipement
<u>Medium-term credit</u>	<u>152.3</u>	<u>277.3</u>	<u>283.3</u>	<u>312.2</u>	<u>Crédits à moyen-terme</u>
Agriculture	12.3	11.5	9.4	9.5	Agriculture
Fishing	0.7	1.7	1.3	1.0	Pêche
Industry	-	37.0	59.4	94.6	Industrie
Trade & Transport	9.2	15.9	13.3	10.9	Commerce et Transports
Hotels & Restaurants	-	-	-	-	Hôtellerie
Craftsmen	2.5	4.6	5.3	5.2	Artisanat
Construction	72.0	86.8	73.7	73.1	Habitat
Building materials	55.6	119.8	120.3	117.4	Matériaux de construction
Vehicles	-	-	-	-	Automobiles
Small plant	-	-	0.6	0.6	Petit équipement
<u>Long-term credit</u>	<u>182.2</u>	<u>243.9</u>	<u>276.1</u>	<u>262.3</u>	<u>Crédits à long-terme</u>
Agriculture	27.9	32.4	25.3	17.9	Agriculture
Fishing	-	-	-	-	Pêche
Industry	50.3	55.4	71.6	75.3	Industrie
Trade & Transport	-	-	-	-	Commerce et Transports
Hotels & Restaurants	55.9	62.9	60.0	39.8	Hôtellerie
Craftsmen	-	-	-	-	Artisanat
Construction	45.2	90.1	116.8	127.0	Habitat
Building materials	2.9	3.1	2.4	2.3	Matériaux de construction
Vehicles	-	-	-	-	Automobiles
Small plant	-	-	-	-	Petit équipement
<u>Current Accounts</u>	-	-	-	17.9	<u>Prêts en Compte Courant</u>
<u>Not Specified 2/</u>	<u>4.6</u>	<u>4.6</u>	<u>8.4</u>		
Craftsmen	0.1	0.1	0.2	..	Artisanat
Construction	2.4	2.4	3.6	..	
Building materials	2.1	2.1	3.5	..	
Vehicles	-	-	1.1	..	Automobiles
Total	388.2	573.7	629.0	635.5	Total
=====	=====	=====	=====	=====	=====

1/ CREDICOM : Société de Crédit pour le Développement des Comores

2/ Bad credits not specified by term/ Créances douteuses non allouées selon le terme

.. Too small to be expressed/Valeur insignifiante
 .. not available/non disponible

Source: CREDICOM

Table/Tableau 6.3

NUMBER AND AMOUNT OF LOANS MADE BY CREDICOM

NOMBRE ET MONTANT DES PRETS ACCORDES PAR CREDICOM

(in millions CFAF ; en millions de francs CFA)

	1974		1975		1976		
	Number Montant	Amount Montant	Number Nombre	Amount Montant	Number Nombre	Amount Montant	
Agriculture	7	12.2	1	3.0	-	-	Agriculture
Fisheries ^{1/}	11	5.7	3	2.1	-	-	Pêche
Hotels	1	0.3	2	57.4	-	-	Hôtels
Commerce ^{2/}	6	275.2	1	7.0	2	43.7	Commerce
Industry	6	2.1	16	80.0	11	24.3	Industrie
Housing	85	99.0	66	82.3	78	56.6	Habit
Construction materials	274	59.9	312	94.4	-	-	Materiaux de construction
Vehicles	81	44.3	54	23.8	17	5.8	Automobiles
Small plant	12	2.5	16	3.3	8	2.4	Petit équipement
Total	483	501.2	471	353.3	116	132.9	Total
Short-term	138	68.1	126	..	49	75.4	Court-terme
Medium-term	321	159.6	318	..	60	39.4	Moyen-terme
Long-term	24	273.4	27	..	7	18.1	Long-terme

^{1/} Including marine transport/Y inclus transport maritime

^{2/} Including air transport/Y inclus transport aérien

.. Not available/non disponible

Source: CREDICOM

Table/Tableau 6.4

CREDIT TO THE PUBLIC SECTOR BY CCCE
 CREDITS ACCORDES AU SECTEUR PUBLIC PAR LA CCCE
 (outstanding, end of period, in millions CFAF)
 (encours en fin de période, en millions de FCFA)

	<u>December 1974</u>	<u>December 1975</u>	<u>October 1976</u>	
Power	69.1	63.4	58.8	Energie
Plant	37.9	84.2	75.9	Equipement
Education	14.2	13.2	12.0	Enseignement
Health	83.0	99.2	93.8	Santé
Other	345.1	333.3	319.7	Divers
<u>Total</u>	<u>549.3</u>	<u>593.3</u>	<u>560.2</u>	<u>Total</u>
Memorandum item:				Pour mémoire
Replenishment of CREDICOM	(50.2)	(546.5)	(659.7)	Avances au CREDICOM

Source: Caisse Centrale de Coopération Economique (CCCE)

Table/Tableau 7.1

DISTRIBUTION OF LAND BY USE, 1965

REPARTITION DES TERRES PAR UTILISATION, 1965

	<u>Grande Comore</u>		<u>Anjouan</u>		<u>Mayotte</u>		<u>Mohéli</u>		<u>Archipelago</u>	
	Ha	%	Ha	%	Ha	%	Ha	%	Ha	%
Cultivated land Terres cultivées	40,000	34.8	27,000	63.7	24,000	64.2	13,000	58.6	104,000	48.3
Pasture Pâturages	10,800	9.4	-	-	2,400	6.4	1,500	6.9	14,700	6.8
Forest Forêts	12,500	10.9	10,400	24.5	7,000	18.7	4,600	20.7	34,500	16.1
Land not in economic use Terres non utilisées	51,500	44.9	5,000	11.8	4,000	10.7	3,000	13.8	63,500	28.8
Total	114,800	100.0	42,400	100.0	37,400	100.0	22,100	100.0	216,700	100.0

Source: Ministry of Production and IRAT's estimates.
Ministère de la Production et estimations de l'IRAT.

Table/Tableau 7.2

DISTRIBUTION OF LAND OWNERSHIP, 1965

DISTRIBUTION DES TERRES PAR CLASSES DE PROPRIETAIRES, 1965

	Grande Comore		Anjouan		Mayotte		Mohéli		
	Ha	%	Ha	%	Ha	%	Ha	%	
State land	32,300	28.1	13,500	32.0	21,200	56.7	14,000	63.3	Domaine de l'Etat
Village Reserves and Comorian owners	66,400	57.9	21,000	49.4	7,500	20.0	1,300	5.9	Reserves villageoises et propriétaires comoriens
Colonial Company Estates	16,100	14.0	7,900	18.6	8,700	23.3	6,800	30.8	Domaine de colonisation
Total	114,800	100.0	42,400	100.0	37,400	100.0	22,100	100.0	Total

Source: Ministry of Production and IRAT's estimates
Ministère de la Production et estimations de l'IRAT.

Table/Tableau 7.3

PRODUCTION OF FOOD 1965 and 1971

PRODUCTION DE PRODUITS VIVRIERS 1965 et 1971

(in tons ; en tonnes)

	1965		Total	1971 Total	
	Marketed Commercialisée	Not Marketed Non-commercialisée			
<u>Cereals</u>					
Rice	792	2,052	2,844	3,700	Riz
Maize	325	830	1,155	1,400	Maïs
<u>Starches</u>					
Cassava	5,010	12,920	17,930	20,000	Manioc
Taros	285	735	1,020	1,200	Taros
Yams	345	881	1,226	1,400	Ignames
Sweet potatoes	610	2,002	2,612	2,900	Patates
<u>Fruits</u>					
Bananas	6,400	16,600	23,000	26,000	Bananes
Coconuts ('000 nuts)	8,200	21,200	29,400	30,000	Noix de coco (Nb. en milliers)
Other	301	776	1,077	..	Autres
<u>Vegetables</u>					
Lady fingers	595	1,527	2,122	2,400	Ambrevades
Amberiques	76	194	270	310	Ambériques
Tomatoes	87	224	311	..	Tomates
Other	91	232	323	..	Autres
<u>Meat & Fish</u>					
Beef	268	685	953	1,000	Boeuf
Other meat	87	230	317	..	Autres viandes
Fresh fish	814	2,110	2,924	3,000	Poissons frais
Dried fish	106	268	374	..	Poissons séchés
<u>Other</u>					
Sugar	2,250	5,750	8,000	..	Sucre
Milk	520	1,330	1,850	..	Lait
Eggs (number in '000)	120	315	435	..	Oeufs (Nb. en milliers)

Source: 1. Survey of Comorian household consumption and food production 1965/66
Enquête sur la consommation des ménages comoriens et la production
vivrière 1965/66; Bureau d'Enquêtes et d'Etudes Statistiques, Moroni.

2. Ministry of Production; Ministère de la Production.

.. not available/non disponible

Table/Tableau 7.4

CURRENT PRODUCTION DATA FOR YLANG

DONNEES COURANTES RELATIVES A LA PRODUCTION D'YLANG

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	
Hectares planted	1,500	1,250	650	150	Hectares cultivés
Number of trees ('000)	600	500	260	60	Nombre d'arbres
Average production of flowers per tree (kg)	2.5	5.0	5.0	2.5	Production moyenne de fleurs par arbre
Average quantity of flowers produced (tons)	1,200	2,700	1,300	1,400	Quantité moyenne de fleurs produite (tonnes)
Average quantity of essence extracted (tons)	22.0	50.0	24.0	2.5	Quantité moyenne d'essence extraite (tonn

Source: Ministry of Production/Ministère de la Production, 1975.

Table/Tableau 7.5

NUMBERS OF LIVESTOCK BY TYPE AND BY ISLAND, 1974

NOMBRE D'ANIMAUX DOMESTIQUES PAR TYPE ET PAR ILE, 1974

<u>Type</u>	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	<u>Espèce</u>
Cattle	22,500	7,750	7,750	5,000	43,000	Bovins
Sheep	3,800	1,600	700	600	6,700	Ovins
Goats	21,500	10,000	10,000	4,000	45,500	Caprins
Donkeys	..	153	117	325	596	Anes
Pigs	45	..	9	4	58	Porcins
Rabbits	640	420	180	75	1,315	Lapins
Poultry	12,500	15,000	15,000	8,000	50,500	Poules

Source: Ministry of Production.

Ministère de la Production.

Table/Tableau 7.6

AREAS UNDER FOREST BY TYPE AND BY ISLAND, 1974

LES SURFACES DES FORETS PAR TYPE ET PAR ILE, 1974

(in hectares ; en hectares)

<u>Type of Forest</u>	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	<u>Type de Forêt</u>
Primary forest	5,600	1,000	2,000	4,000	12,600	Forêt dense
Secondary forest	7,000	1,500	3,500	-	12,000	Forêt secondaire
Planted forest	335	450	63	32	880	Forêt artificielle
Total	12,935	2,950	5,563	4,032	25,480	Total

Source: Service Forestier, Ministère de la Production.

Table/Tableau 7.7

WOOD CONSUMPTION BY TYPE OF WOOD, 1974

CONSOMMATION DE BOIS PAR TYPE DE BOIS, 1974

(in cubic metres : en m3)

<u>Type of Wood</u>	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	<u>Type de Bois</u>
Firewood	296,370	177,320	156,700	43,800	674,190	Bois de feu
Domestic	295,000	160,000	150,000	42,000	647,000	Familial
Distilleries	1,000	14,000	4,500	350	19,850	Distilleries
Chalk	150	2,000	50	580	2,780	Chaux
Charcoal	-	120	150	-	270	Charbon de bois
Bakers	220	1,200	2,000	870	4,290	Boulangeries
Poles	6,330	11,090	1,115	155	18,690	Bois ronds
Fencing	-	240	-	-	240	Piquets
Traditional housing	6,200	10,200	1,100	150	17,650	Habitations en bois
Modern housing	130	650	15	5	800	Habitations en dur
Commercial timber	4,500	250	200	50	5,000	Bois d'oeuvre
Total	307,200	188,660	158,015	44,005	697,880	Total

Source: Service Forestier, Ministère de la Production.

Table/Tableau 7.8

PAST AND PROJECTED PRICES FOR COCONUT PRODUCTS
PRIX DES PRODUITS DERIVES DES NOIX DE COCO: HISTORIQUE ET PROJECTIONS
(in 1975 US dollars, per metric ton)
(en dollars E.U. de 1975, par tonne)

	<u>1970</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1985</u>	
Coconut Oil ^{1/}	752	393	412	619	541	458	513	576	Huile de coco ^{1/}
Coconut pellet ^{2/}	91	145	155	190	195	204	220	380	Tourteaux ^{2/}
Copra ^{3/}	426	256	271	417	360	321	332	394	Coprah ^{3/}

1/ Philippine/Indonesian, bulk/en vrac c.i.f. Rotterdam

2/ Philippine, 26%, c.i.f. Hamburg

3/ Philippine/Indonesian, bulk, c.i.f. N.W. European Ports/en vrac c.i.f. Ports européens du Nord-Ouest

Source: IBRD, Commodity Division
BIRD Division des Matières premières

Table 8.1: PORTS TARIFFS, 1977

		<u>Quay</u>	<u>Lighterage</u>
<u>By Société Maritime</u>			
<u>Load/unload/ship</u>	CF/ton or m ³	250 (min. 100 units)	350 (minim. 140 units)
<u>Use of dhow</u>	CF/ton		700-900
<u>Handling (load/unload)</u> ^{1/}			
Vehicles	CF	3,500/each	1,600/ton or m ³
Barrels	CF/each, full	150	300
	" empty	60	100
Vanilla	CF/ton	1,500	4,000
Bagged goods and iron	CF/ton	750	1,800
Other	CF/ton		1,800
<u>Use of Crane</u>			
Per heavy lift	CF	500	
Per hour	CF	4,500	
<u>Use of truck</u>			
On quay	CF/ton	300	
Transport to town	CF/trip	1,500	
<u>Use of Trailer</u>	CF/ton	30	

<u>1/ Cost to SM</u>	<u>CF/ton</u>
Stevedore gang wages	267.00
1/16 of wages for leave payment	16.68
Social Security	31.20
Meals (each stevedore gets CF70/day for one meal)	22.00
	<u>336.88</u>

Table 8.1: PORT TARIFFS, 1977By Customs:"Droits de quai" (quayside right)

Rice, copra, cement	CF/ton	300
Petroleum products	CF/ton	250
Pouzzolane	CF/ton	50
Cattle	CF/head	500
Other	CF/ton	500

By National Office of Commerce

"Droits de Magasinage" (warehouse right) CF/ton 1,000^{2/}

<u>2/</u> Warehouse labor cost:	CF/ton
Wages	150.00
Leave	9.37
Social Security	<u>17.53</u>
	176.90

Source: Société Maritime, Customs, 1977.

~~Tableau 2.2~~
MARITIME TRAFFIC BY PORT, 1968-1975
TRAFFIC MARITIME PAR PORT, 1968-1975

		1968	1969	1970	1971	1972	1973	1974	1975	
MORONI PORT										
Number of calls	a	134	141	145	132	132	127	126	83	Nombre de touchés
	b	115	118	97	94	100	101	102	83	
Net tonnage of crafts ('000 t.)	a	61.5	66.9	59.0	70.4	80.0	68.7	73.0	46.0	Jauge nette ('000 t.)
	b	2.9	2.8	2.6	4.3	4.2	3.7	4.0	3.5	
Goods delivered ('000 m.t.)	a	19.9	27.5	27.2	32.6	40.9	32.7	37.6	32.6	Entrées marchandises ('000 t.)
	b	0.6	0.5	0.8	0.7	1.0	0.8	0.8	1.2	
Goods shipped ('000 m.t.)	a	20.6	10.3	8.8	8.7	8.8	4.8	2.6	1.1	Sorties marchandises ('000 t.)
	b	2.6	1.8	2.3	3.1	3.3	2.6	2.7	2.6	
Passenger arrivals (no.)	a	1,359	1,444	1,692	1,539	2,110	1,644	1,172	1,263	Entrées passagers (nbre.)
	b	208	615	764	614	680	658	650	527	
Passenger departures (no.)	a	1,052	1,372	1,607	1,362	1,695	777	308	831	Sorties passagers (nbre.)
	b	197	651	744	673	770	610	615	440	
MITSAMU PORT										
Number of calls	a	108	133	135	100	101	83	92	50	Nombre de touchés
	b	197	220	182	190	185	248	276	203	
Net tonnage of crafts ('000 t.)	a	65.4	52.7	66.8	43.8	30.7	32.2	43.0	40.2	Jauge nette ('000 t.)
	b	4.4	4.7	4.8	7.6	6.8	7.5	8.6	6.6	
Goods delivered ('000 m.t.)	a	10.9	11.3	15.9	20.1	20.5	19.4	24.8	18.2	Entrées marchandises ('000 t.)
	b	0.6	0.8	1.0	1.0	1.5	1.8	3.3	1.1	
Goods shipped ('000 m.t.)	a	1.1	1.4	1.4	1.3	0.8	0.8	4.5	1.3	Sorties marchandises ('000 t.)
	b	1.2	2.3	3.0	3.7	4.2	4.8	3.5	3.9	
Passenger arrivals (no.)	a	606	629	482	377	364	194	143	115	Entrées passagers (nbre.)
	b	286	517	710	352	458	703	936	1,239	
Passenger departures (no.)	a	428	484	538	429	362	177	157	68	Sorties passagers (nbre.)
	b	220	473	422	408	307	370	761	644	
DZAOUZI PORT										
Number of calls	a	68	75	79	63	61	52	48	13	Nombre de touchés
	b	62	81	75	73	77	79	73	27	
Net tonnage of crafts ('000 t.)	a	10.2	9.4	11.6	10.4	9.2	8.0	7.6	1.9	Jauge nette ('000 t.)
	b	1.8	2.4	2.7	3.1	3.6	3.1	2.8	1.3	
Goods delivered ('000 m.t.)	a	2.8	2.6	3.5	2.5	3.2	2.3	3.4	1.3	Entrées marchandises ('000 t.)
	b	1.1	1.6	3.4	3.1	3.0	2.9	3.5	2.0	
Goods shipped ('000 m.t.)	a	0.9	1.1	1.1	1.7	0.9	1.7	1.0	-	Sorties marchandises ('000 t.)
	b	0.2	0.2	0.4	1.1	0.2	0.4	0.1	0.1	
Passenger arrivals (no.)	a	60	35	69	89	74	74	51	17	Entrées passagers (nbre.)
	b	68	202	195	258	96	161	284	59	
Passenger departures (no.)	a	34	68	69	77	53	18	13	-	Sorties passagers (nbre.)
	b	91	206	315	282	245	222	251	60	
POMBONI PORT										
Number of calls	a	30	26	18	22	20	13	5	5	Nombre de touchés
	b	207	214	178	174	184	240	254	208	
Net tonnage of crafts ('000 t.)	a	3.5	2.9	2.2	2.9	2.5	2.4	0.8	0.8	Jauge nette ('000 t.)
	b	3.8	3.4	3.2	4.8	4.5	5.0	5.8	4.5	
Goods delivered ('000 m.t.)	a	0.3	0.2	0.2	0.2	1.1	-	-	0.5	Entrées marchandises ('000 t.)
	b	1.1	1.3	1.2	2.4	2.3	2.9	2.4	2.1	
Goods shipped ('000 m.t.)	a	1.2	1.5	0.9	1.4	0.9	1.5	0.2	0.2	Sorties marchandises ('000 t.)
	b	0.2	0.2	0.4	0.3	0.3	0.9	1.5	0.6	
Passenger arrivals (no.)	a	8	7	5	-	1	-	-	-	Entrées passagers (nbre.)
	b	591	1,209	996	804	719	664	1,050	1,205	
Passenger departures (no.)	a	6	12	13	23	16	2	-	-	Sorties passagers (nbre.)
	b	649	1,373	1,100	855	824	1,134	1,295	1,477	

. Too small to be expressed/valeur insignifiante
a: International shipping/navigation internationale
b: Coastal shipping/cabotage

1/ Dzaoudzi, 1975: January-June/Janvier-juin

Source: Service des Douanes, Ministère des Finances.

Table 8.3: CARGO PACKAGING - PRINCIPAL IMPORTS

(tons)

	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>Three Year Average</u>	
<u>Bagged</u>					<u>En sacs</u>
Rice	12,036	16,532	10,369	12,979	Riz
Flour	1,525	1,516	1,325	1,455	Farine
Cement	<u>7,748</u>	<u>27,023</u>	<u>19,087</u>	<u>17,886</u>	Ciment
Sub-total	21,309	45,071	30,781	32,387	Sous-total
<u>Liquid Bulk</u>					<u>Liquides</u>
Gasoline	3,362	6,576	4,129	4,689	Essence
Kerosene	1,307	937	1,053	1,099	Kerosene
Heavy Oil	<u>4,962</u>	<u>6,629</u>	<u>4,202</u>	<u>5,264</u>	Huile lourd
Sub-total	9,631	14,142	9,384	11,052	Sous-total
<u>Total Imports</u>	45,975	75,115	55,425	58,838	<u>Importa- tions tot.</u>
% Bagged	46.3	60.0	55.5	53.9	% en sacs
% Liquid	20.9	18.8	16.9	18.9	% liquides
% Other	32.8	21.2	27.6	27.2	% divers

Source: 1975 Annual Report, Customs Service, Ministry of Finance

April 1977

Table 8.4: REPRESENTATIVE SEA FREIGHT RATES, 1977

(CF/ton)

	<u>Interisland</u>	<u>Majunga to Comoros</u>	<u>Mombasa, Dar es Salaam to Comoros (Moroni) <u>1/</u></u>
Cement	2,500	3,795	7,105
Petroleum (barrels)	800	1,825	430
Rice	2,600	3,945	14,445
General	3,500	8,270	Not available
Steel, 8-12 m	3,500	12,445	Not available
Vehicle, 1-2 tons	13,000	26,560	23,030
Salt	2,600	4,325	10,290
Sugar	2,600	6,520	16,415
Flour	2,600	5,310	16,415

1/ Direct or with trans-shipment.

Source: Soci t  Comorienne de Navigation (Shipping Agents), 1977

Table 8.5: INTERISLAND AIR TRAFFIC, 1975-76

From	To	(March-December) 1975			1976				
		Adults	Children	Freight (tons)	Adults	Children	Freight (tons)		
Iconi	Fomboni	1,435	251	10.1	1,198	180	7.9		
	Ouani	2,271	377	54.0	2,060	315	36.4		
	Dzaoudzi	1,299	292	49.3	702	150	37.2		
Fomboni	Iconi	1,356	278	2.1	1,009	181	1.3		
	Ouani	522	182	0.4	439	90	1.2		
	Dzaoudzi	196	77	1.4	33	8	0.2		
Ouani	Iconi	2,259	438	27.5	2,149	359	41.5		
	Fomboni	380	137	1.6	422	87	0.7		
	Dzaoudzi	783	139	5.4	306	96	7.0		
Dzaoudzi	Ouani	993	398	2.8	332	117	0.2		
	Fomboni	225	67	0.7	48	26	0.3		
	Iconi	1,349	260	25.4	685	161	16.9		
<u>Totals</u>									
		<u>Passengers</u>		<u>Freight (tn.)</u>		<u>Passengers</u>		<u>Freight (tn.)</u>	
		<u>In</u>	<u>Out</u>	<u>In</u>	<u>Out</u>	<u>In</u>	<u>Out</u>	<u>In</u>	<u>Out</u>
Iconi		5,940	5,925	55.0	113.4	4,544	4,605	59.7	81.5
Ouani		4,743	4,136	57.2	34.5	3,353	3,419	37.8	49.2
Fomboni		2,495	2,611	12.4	3.9	1,961	1,760	8.9	2.7
Dzaoudzi		2,786	3,292	56.1	28.9	1,295	1,369	44.4	17.4
		15,964		180.7		11,153		150.8	

Source: Air Comores, 1977; own elaboration.

Table 8.6: REPRESENTATIVE AIR FREIGHT RATES, 1977

(CF)

	<u>Fare</u> ^{1/}	<u>Tax</u>	<u>Stamp</u>	<u>Trucking/kg</u>	<u>Total/kg</u>
<u>Interisland:</u>					
Moroni - Mutsamudu	min.306	200	5 ^o /oo		
	kg 53	45	5 ^o /oo		98
Moroni - Fomboni	min.306	200	5 ^o /oo		
	kg 40	45	5 ^o /oo		85
<u>International</u>					
France	min.4,250				
	up to 45 kg/kg 815	45	5 ^o /oo		894(US\$3.7)
	more than 45 kg/kg 620	300	5 ^o /oo	10	933(US\$3.8)
U.S.A	min.8,500				
	up to 45 kg/kg 1,630	45	5 ^o /oo		1,683(US\$7)
	more than 45 kg/kg 1,240	300	5 ^o /oo	10	1,556(US\$6.4)

1/ Non-accompanied luggage costs half the fares shown.

Source: Air Comores, 1977.

Table 8.7: ROAD NETWORK, 1972/76

(km)

<u>Island</u>	<u>1972</u>			<u>1977</u>			
	<u>Paved</u>	<u>Earth</u>	<u>Total</u>	<u>Paved</u>	<u>Being Paved</u>	<u>Earth</u>	<u>Total</u>
Grande Comore	125	136	261	143	67	199	409
Anjouan	79	55	134	79	21	87	187
Moheli	3	85	88	30	-	88	118
Sub-Total	207	276	483	252	88	374	714
Mayotte	30	82	112	30	n.a.	109	139
Total	237	358	595	282		483	853

Source: Ministry of Works and Energy, 1977.

Table 8.8: MOTOR VEHICLES STATISTICS, 1964-75

Year	Grande Comore			Anjouan			Moheli			Mayotte			Total		
	Cars & pick-ups	Light trucks	Total	Cars & pick-ups	Light trucks	Total	Cars & pick-ups	Light trucks	Total	Cars & pick-ups	Light trucks	Total	Cars & pick-ups	Light trucks	Total
<u>New Vehicle Registrations</u>															
1964			132			45			7			16			200
1965			99			29			3			16			147
1966			153			35			4			4			196
1967			144			31			6			16			197
1968			110			33			1			4			148
1969			150			28			2			7			187
1970	185	16	201	30	8	38	1	-	1	11	6	17	227	30	257
1971	249	32	281	36	5	41	2	1	3	13	-	13	300	38	338
1972	181	41	222	13	6	19	3	1	4	11	1	12	208	49	257
1973	274	37	311	49	5	54	6	-	6	16	1	17	345	43	388
1974	237	17	254	51	4	55	9	1	10	23	3	26	320	25	345
1975	211	24	235	46	11	57	6	-	6	16	1	17	279	36	315

Estimated Fleet^{1/}

1970	758	165	14	48	985
1971	886	171	13	57	1,127
1972	964	159	11	53	1,187
1973	1,165	180	16	66	1,427
1974	1,269	207	24	85	1,585
1975	1,303	226	29	85	1,643
Average growth % p.a.	11.5	6.5	16	12	11

^{1/} Assuming 5 years average vehicle life.

Source: Ministry of Public Works and Energy, and own elaboration, 1977.

Table 8.10: REPRESENTATIVE ROAD TRANSPORT FARES, 1977

	<u>1/</u> <u>km</u>	<u>Passenger Tariff (CF)</u>
<u>Grande Comore</u>		
between Moroni and:		
M'beni	38p+26e	250
Chomoni	12p+15e	200
Fomboni	48p	200
Mitsamioule	38p	150
Mitsoudje	13p	50
Itsandra	4p	50
<u>Anjouan</u>		
between Mutsamudu and:		
Domoni	40p	200
Sima	19p	150
between Sima and Pomoni	21e	200

1/ p: paved, e: earth

Source: Ministry of Works and Energy, 1977.

Table 8.11: VEHICLE OPERATING COSTS (MOUNTAINOUS TERRAIN)

(FC/km at March 1977 prices)

	<u>Economic</u>		<u>Financial</u>	
	<u>Bitumen</u>	<u>Earth</u>	<u>Bitumen</u>	<u>Earth</u>
Small car	23.88	45.14	36.14	67.82
Medium car and pick-up	35.73	67.06	51.01 ^{1/}	95.03 ^{1/}
3.5-ton truck	77.02	144.76	109.78	204.35

^{1/} Considering an average of 15 passengers, at CF3.05 and 5.61 per km of earth and paved road respectively, the revenue per km results in CF 45.75 and 84.15 (in Grande Comore). In Anjouan, revenues would be CF 75 and CF 150 per km.

Source: Bank mission, 1977.

Table/Tableau 8.12

PRIMARY EDUCATION SITUATION 1975-76

ENSEIGNEMENT PRIMAIRE : SITUATION 1975-76

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	
Number of schools	85	40	23	13	161	Nombre d'écoles
Number of classrooms	216	121	30	58	425	Nombre de salles de classe
Number of girls enrolled	7,014	3,014	..	822	..	Nombre de filles inscrites
Number of boys enrolled	10,806	7,173	..	1,328	..	Nombre de garçons inscrits
Number of pupils enrolled	17,820	10,187	5,202	2,150	35,359	Nombre d'élèves
Number of teachers	391	226	89	50	756	Nombre de maîtres
(of whom trained)	(90)	(98)	(..)	(12)	(..)	(dont titulaires)

.. not available/non disponible

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.13

PRIMARY EDUCATION: NUMBER OF SCHOOLS, CLASS ROOMS AND TEACHERS

ENSEIGNMENT PRIMAIRE: NOMBRE D'ECOLE, DE SALLES DE CLASSE ET DU PERSONNEL ENSEIGNANT

	<u>Schools</u> <u>Ecoles</u>	<u>Classrooms</u> <u>Salles de Classe</u>	<u>Teachers</u> <u>Maîtres</u>
1970-71	100	..	356
1971-72	123	..	405
1972-73	129	..	479
1973-74	141	..	520
1974-75	143	366	630
1975-76	161	425	756
1976-77	192	485	683

.. Not available
Non-disponible

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.14

PRIMARY SCHOOL ENROLMENTS 1971-77

NOMBRE D'ELEVES: ENSEIGNMENT PRIMAIRE 1971-77

	<u>Grade/Classe</u>							
	CP1	CP2	CE1	CE2	CM1	CM2	CEPE	TOTAL
1976-77	14,081	8,216	7,092	4,563	3,563	4,823	-	42,338 ^{1/}
1975-76	10,833	6,848	6,063	4,075	3,270	4,270	459	35,818
1974-75	9,350	5,250	4,700	3,211	3,042	3,345	817	29,715
1973-74	7,600	4,370	3,725	2,965	2,019	2,515	602	23,796
1972-73	4,946	3,440	2,720	2,090	1,503	2,084	429	17,212
<u>1971-72</u>	4,939	3,431	2,711	1,967	1,952	1,670	289	16,959

1/ Does not include over 200 enrolments of refugees' children from Madagascar/
n'inclut pas environ 200 élèves provenant de Madagascar.

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.15

PUBLIC SECONDARY EDUCATION : ENROLMENTS BY CLASS

ENSEIGNEMENT SECONDAIRE PUBLIC : NOMBRE D'ELEVES PAR CLASSE

	<u>6ème</u>	<u>5ème</u>	<u>4ème</u>	<u>3ème</u>	<u>2nd</u>	<u>1ère</u>	<u>Terminale</u>	<u>Total</u>
1970-71	299	238	250	195	114	81	71	1,248
1972-73	743	479	291	233	183	112	109	2,150
1974-75	1,113	1,006	630	464	262	166	138	3,779
1976-77 ^{1/}	2,772 ^{2/}	863	840	100	379	212	125	5,291

1/ Enrolments in classes 6ème - 4ème are held over from the previous year when teaching was suspended.
Les élèves inscrits en 6ème - 4ème étaient reconduits de l'année précédente à la suite de la fermeture des écoles.

2/ Includes 1,031 entrants held over from 1975-76 and 1,741 new entrants.
Y inclus 1,031 élèves reconduits de 1975-76 et 1,741 nouveaux élèves.

Note: In 1974-75, 225 pupils were enrolled in private secondary schools (Free Catholic Mission School, Moroni, and Royal Collège, Mutsamudu).
En 1974-75, 225 élèves étaient dans les écoles secondaires privées (Ecole Libre de la Mission Catholique, Moroni et Collège Royal, Mutsamudu).

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.16

PUBLIC SECONDARY EDUCATION: SITUATION IN 1974-75

EDUCATION SECONDAIRE PUBLIQUE: SITUATION EN 1974-75

	<u>Moroni Lycee</u>	<u>Mutsamudu Lycee</u>	<u>Mitsamiouli College</u>	<u>Foumbouni College</u>	<u>Domoni College</u>	<u>Mohéli College</u>	<u>Mayotte College</u>	<u>Total</u>	
Enrolled	1714	814	285	53	279	221	393	3759	^{1/} Effectifs
Boys	1263	627	220	41	207	168	290	2816	Garçons
Girls	451	187	65	12	72	53	103	943	Filles
Boarders	385	133	40	-	-	-	87	645	Internes
Teachers	64	33	10	3	10	8	..	128 ^{2/}	Professeurs
Total Cost (In millions de francs CFA)	588	228	60	17	67	56	..	1016	Côut Total (en millions de francs CFA)

^{1/} This figure is 20 less than the total given in Table 8.16: the reason for the difference is not known/
ce chiffre est inférieur de 20 unités à celui reproduit dans le Tableau 8.16; la raison n'en est pas connue.

^{2/} 10 of whom were Comorians
Dont 10 étaient Comoriens

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.17

EXAMINATION PASSES
REUSSITE AUX EXAMENS

	<u>CEPE</u> ^{1/}	<u>BE</u> ^{2/}	<u>BEPC</u> ^{3/}	<u>BAC</u> ^{4/}
1970	297	16	128	23
1971	289	4	140	46
1972	300	4	..	65
1973	320	5	162	68
1974	396	..	244	67
1975	602	14	245	67
1976 ^{5/}	457	16	412	68

1/ Certificat d'Etudes Primaire

2/ Brevet Elementaire

3/ Brevet des Etudes de Premier Cycle

4/ Baccalauréat

5/ Excludes Mayotte
Mayotte non compris

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.18

NUMBER OF STUDENTS STUDYING OVERSEAS 1/

NOMBRE D'ETUDIANTS POURSUIVANT DES ETUDES SUPERIEURES A L'ETRANGER 1/

<u>Course</u>	<u>1970-71</u>	<u>1971-72</u>	<u>1972-73</u>	<u>1973-74</u>	<u>1974-75</u>	<u>1975-76</u>	<u>Etudes</u>
Humanities	5	31	10	55	75	63	Lettres et sciences humaines
Sciences	5	20	5	41	40	6	Sciences
Law	18	17	5	20	30	17	Droit
Economics and Business Administration	1	5	7	23	21	43	Sciences économiques et gestion
Medicine, dentistry Pharmacy	8	20	8	25	51	41	Médecins, dentistes pharmaciens
Engineering	7	12	5	17	31	31	Ingénieurs
Public Administration	2	6	4	15	44	35	Administration publique
Other	11	13	15	30	73	84	Autres
Total	57	124	59	226	365	320	Total

1/ For the period 1970-74 the figures refer only to students in France and excludes State scholars.
Pour la période 1970-74 les chiffres se réfèrent aux étudiants poursuivant des études en France
à l'exclusion de ceux bénéficiant d'une bourse d'Etat.

Source: Ministry of National Education
Ministère de l'Education Nationale

Table/Tableau 8.19

MEDICAL CASES BY MAIN ILLNESS OFFICIALLY REPORTED IN 1974
MALADIES PRINCIPALES A DECLARATION OBLIGATOIRE EN 1974

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	
Malaria	55,309	9,652	8,339	2,419	75,719	Paludisme
Helminthiasis	14,222	8,795	3,297	1,014	27,328	Helminthiases
Syphillis	319	7	4	1	331	Syphillis
Infect. Gonoc.	9,232	1,816	1,361	875	13,284	Infect. Gonoc.
Pulmonary Tuberculosis	128	17	16	24	185	Tuberc. Pulmo.
Leprosy	5	106	18	-	129	Lèpre
Measles	2,296	15	1	-	2,312	Rougeole

Source: Basic Health Service
Service de Santé de Base et des Grandes Epidémies

Table/Tableau 8.20

SELECTED DATA ON HEALTH CARE, 1972
SERVICES DE SANTE: DONNEES CHOISIES, 1972

	<u>Grande Comore</u>	<u>Anjouan</u>	<u>Mayotte</u>	<u>Mohéli</u>	<u>Archipelago Archipel</u>	
Main hospitals	1	1	1	-	3	Hôpitaux principaux
Rural hospitals	2	1	1	1	5	Hôpitaux ruraux
Health clinics	1	1	-	-	2	Centres médicaux
Rural maternity centers	2	-	-	-	2	Maternités rurales
Rural health posts	20	10	10	10	50	Postes médicaux ruraux
Hospital beds	296	150	120	46	612	Lits d'hôpital
Hospital patients	6,987	3,527	1,965	1,634	14,113	Malades hospitalisés

Source: Statistics Yearbook, 1974
Annuaire Statistique, 1974

Table/Tableau 9.1

COST-OF-LIVING INDEX IN MORONI, 1972-1975
INDICE DU COUT DE LA VIE A MORONI, 1972-1975
(annual averages, 1975 = 100)
(moyennes annuelles, 1975 = 100)

		<u>1972</u>	<u>1973</u>	<u>1974</u>	
	Weights Pondération				
Food	67.8	65.7	66.4	92.5	Alimentation
Clothing	11.6	51.2	57.6	66.4	Habillement
Housing	6.1	47.1	51.7	78.5	Logement
Services	5.6	64.5	82.8	88.7	Services
Entertainment	6.6	55.3	62.0	69.5	Loisirs
Transport	2.3	62.7	65.4	77.6	Transports
<u>General index</u>	<u>100.0</u>	<u>63.4</u>	<u>66.9</u>	<u>87.9</u>	<u>Index général</u>

Source:- Bureau d'Etudes Economiques et Statistiques, Service des Douanes;
- Etude sur la consommation des ménages, 1973;
- Mission calculations/Calculs de la mission.

Table/Tableau 9.2

PRICE INDICES FOR SELECTED PRODUCTS: MORONI MARKET, 1972-1974
 INDICES DES PRIX DE CERTAINS PRODUITS SUR LE MARCHE DE MORONI, 1972-1974
 (Monthly averages)
 (Moyennes mensuelles)

Product 1972	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Produits 1972
Fresh meat	100	117	109	112	112	112	106	161	156	164	240	228	Viande fraiche
Fresh fish	100	112	132	145	195	178	240	272	250	267	187	192	Poisson frais
Green bananas	100	71	92	74	72	87	67	79	88	103	90	80	Bananes plantains
Ripe bananas	100	66	63	64	49	35	31	40	46	52	45	51	Bananes mures
Cassava	100	118	98	100	106	118	105	112	114	115	115	106	Manioc
Fresh coconut	100	116	215	315	180	153	129	90	104	124	145	170	Noix de coco
Tomatoes	100	116	215	315	180	153	129	90	104	124	145	170	Tomates
Other fruits	100	95	86	61	52	49	60	67	64	70	62	59	Autres fruits
<u>1973</u>													<u>1973</u>
Fresh meat	296	243	241	235	225	241	230	216	225	234	210	217	Viande fraiche
Fresh fish	252	232	180	142	172	180	180	210	215	292	190	80	Poisson frais
Green bananas	71	65	55	67	61	64	64	69	68	87	73	36	Bananes plantains
Ripe bananas	59	49	36	32	32	32	35	38	37	42	56	153	Bananes mures
Cassava	68	73	76	104	112	108	99	108	123	143	140	110	Manioc
Fresh coconut	79	73	69	70	76	79	77	79	76	73	92	111	Noix de coco
Tomatoes	187	230	65	331	328	208	141	123	118	126	113	78	Tomates
Other fruits	67	68	49	46	51	58	60	68	77	67	116	.	Autres fruits
<u>1974</u>													<u>1974</u>
Fresh meat	238	227	238	229	235	233	232	226	256	223	275	273	Viande fraiche
Fresh fish	184	293	276	286	233	189	234	272	215	298	218	202	Poisson frais
Green bananas	108	128	116	120	148	208	156	140	64	70	104	124	Bananes plantains
Ripe bananas	76	57	44	36	67	57	60	71	38	48	40	42	Bananes mures
Cassava	147	167	207	220	260	200	240	167	113	115	153	153	Manioc
Fresh coconut	110	111	120	129	124	95	93	63	24	24	24	24	Noix de coco
Tomatoes	113	116	220	261	229	102	286	134	117	126	126	180	Tomates
Other fruits	86	88	84	114	128	111	132	138	..	..	..	..	Autres fruits

.. not available/non-disponible

Source: Bureau d'Etudes Statistiques et Economiques.

Table/Tableau 10.1

SELECTED METEOROLOGICAL DATA, AVERAGES 1970-1974
 STATISTIQUES CHOISIES SUR LE CLIMAT, MOYENNES 1970-1974

	January Janvier	February Février	March Mars	April Avril	May Mai	June Juin	July Juillet	August Août	September Septembre	October Octobre	November Novembre	December Décembre
MYRONI (Grande Comore)												
Temperature/Température												
Maximum (°C)	32.6	32.8	32.8	32.3	31.9	30.8	30.4	29.9	30.1	31.6	32.8	32.3
Minimum (°C)	21.4	21.7	21.4	20.7	19.2	17.1	16.1	15.5	16.9	18.5	19.7	21.1
Rainfall/Précipitation												
Millimeters/mm	399	321	227	260	287	238	134	83	67	145	58	199
Number of days/ Nombre de jours	16	14	16	16	9	9	8	9	7	10	7	14
Average Humidity (%) Humidité moyenne (%)	82	83	83	87	88	76	77	79	79	82	79	77
Insolation hours heures	165	162	215	192	246	228	236	218	205	200	243	227
OUANI (Anjouan)												
Temperature/Température												
Maximum (°C)	32.1	32.0	32.1	32.2	32.0	31.0	30.7	29.7	29.5	30.1	31.6	32.1
Minimum (°C)	21.3	22.1	21.9	20.9	19.3	16.7	17.0	16.8	16.7	19.2	20.1	20.8
Rainfall/Précipitation												
Millimeters/mm	405	255	399	184	33	66	13	26	50	40	84	207
Number of days/ Nombre de jours	17	13	20	13	6	4	2	5	7	13	10	12
Average Humidity (%) Humidité moyenne (%)	84	84	83	65	78	74	74	76	77	84	79	80
Isolation hours heures	154	156	210	219	205	234	254	238	220	201	230	209

Source: Service de la Météorologie, Direction de l'Aviation civile