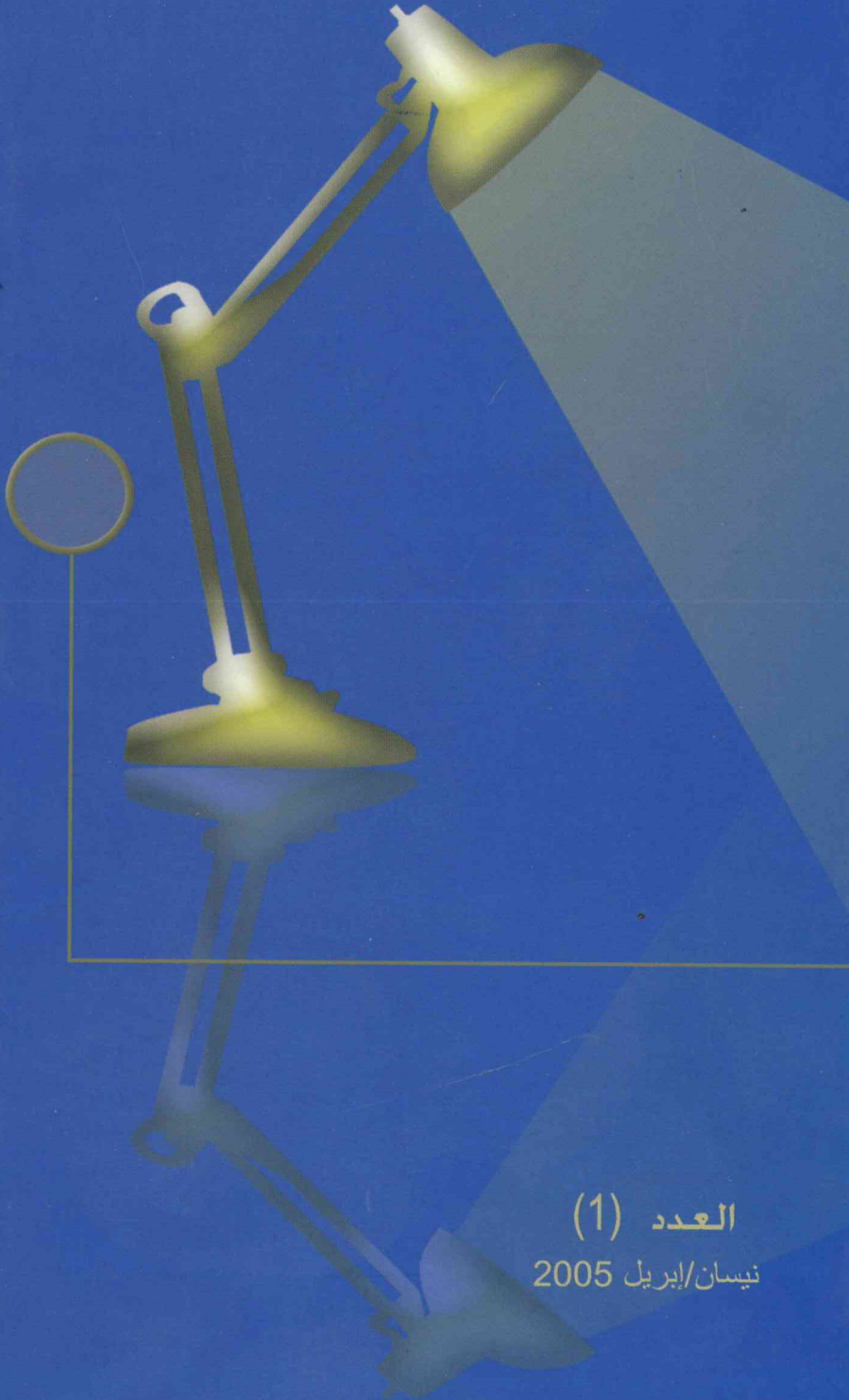




معهد أبحاث السياسات الاقتصادية الفلسطينية
(ماس)

الإقتصادي والإجتماعي

الربع الأول 2005



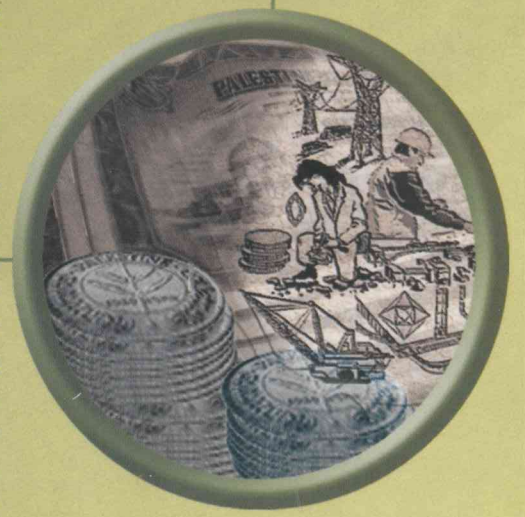
العدد (1)

نيسان/إبريل 2005



الجهاز المركزي للإحصاء الفلسطيني

المراقب



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1997

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1	-1
3	-2
3	1-2
4	2-2
4	-3
4	1-3
6	2-3
7	3-3
8	4-3
9	-4
9	1-4
10	2-4
10	3-4
10	4-4
11	5-4
11	6-4
11	7-4
12	-5
13	1-5
13	-6
14	1-6
14	2-6
15	3-6
16	-7
17	-8
18	1-8
19	-9
19	1-9
20	2-9
20	3-9

22	-10
23	-11
23	1-11
26	2-11
27	-12
29	-13
29	1-13
30	2-13
32	-14
33	1-14
<i>33</i>	
<i>33</i>	
<i>33</i>	
<i>34</i>	
35	
37	

8	(2004)	:1
12	2005	:2
18	2004	:3
	2004	:4
21		
31		:5
32	2005	:6

1	2004	:1
2	2004-1997/	:2
2	2004-1997	:3
5	2003	:4
12	2005/2004	:5
14	2004	:6
15	2004	:7
16	2004	:8
16	2004	:9
		:10
17	2004	
18	2004	:11
19	2004	:12
22	2004	:13
23	2004	:14
23	2004	:15
24	2004	:16
24	2004	:17
		:18
25		2004
25	2004	:19
25	2004	:20
26	2004	:21
		:22
26		2004
		:23
27		2004
27	2004	:24
28	2004	:26
28		2004
		:27
28	2004	:28

.1967

15

1,000

(

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15

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.(64-15

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65

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1000

1000

2004	2003	2002	2001	2000	1999	1995	
		4169.3	4325.7	4619.2	4883.4	3490.4	) - (
		1203.4	1311.2	1466.4	1617.2	1405.6	- ()
		4284.8	4371.8	4574	4786.6	3645.9	()
		727.2	1186.2	1507.7	2162.4	1086.2	()
		1222.9	1326.1	1162.2	1062.2	651.9	()
		-2050.1	-2550.3	-2624.7	-3127.9	-1893.6	()
		2615.1	3155.5	3513.9	4081.7	2560.7	
		565	605.2	889.1	953.8	667.1	
		401.4	491.7	807.3	959.3	608.9	() +
		334.3	389.4	766.4	917.8	516.8	()
		67.1	102.3	40.9	41.4	92.1	()
		4570.7	4817.4	5426.5	5842.6	4099.3	) - = (
		1319.3	1460.3	1722.7	1934.8	1650.8	- ()
577	590.7	487.1	508.1	597	588.3	417	- -
528	533.4	436.9	438.5	480	453.6	349.4	-
49	57.3	50.2	69.6	117	134.7	67.6	-
40.4	40.4	38.1	38.7	41.5	41.6	39	(%)
26.8	25.6	31.3	25.5	14.1	11.8	18.2	(%)
	32.1	34.1	33	35.2	33	.	(%) (34-25)
3	4.4	5.7	1.23	2.8	5.54	10.8	(%)
141.86	137.73	131.92	124.79	123.28	119.93		
		60	44	32	21		(%)
² 947.3	676.24	392.34	1092	1363.9	1136.2	750	¹ ()
346.34	248.96	230.82	287.1	963.9	901.2	425	()
616.6	427.28	161.52	-	-	-	-	()
1511.59	1156.86	1082.7	1254	1386.15	1215.81	715.3	()
1485.84	1131.06	1021.51	1031.2	970.95	972.6	525.3	()
25.75	25.8	⁴ 61.2	222.8	415.2	243.21	190	) ³ (

(2004-2002)

(2001-95)

1

" "

15.65

2

(2001-95)

3

37.4

4

2004	2003	2002	2001	2000	1999	1995	
(564.29)	(480.62)	(690.63)	(966.9)	(422.25)	(314.61)	(290.3)	) () (
-	⁷ 727.91	⁶ 518.7	⁵ 804.9	400	235	325	()
(22.01)	42.8	(171.66)	(162)	(22.25)	(79.61)	34.7+	) () (
	1045.5	966.1	1045.8	559.2	523.9		()
1257	914.07	887.24	839.72	391.85	286.62	44.12	()
3869.52	3558.87	3275.5	3349.94	3470.13	2832	.	() - -
1383.8	1072	957.12	1220	1346.25	991.9	.	- - ()
57.5	54.2	54.4	52.7	56.8	53.5	.	(%)
44.7	44.3	43.6	44.4	38.3	44	.	(%)
35.8	30.1	29.2	36.4	38.8	35	.	(%)

39 5
48.36 6
205 7

2004 3.4% 3.7% .

1306 552 388 7.5% .

20% 39% 61% .

61% 22% .

2004 41% 2004 26.7% 25.6% 49 58 .

2004 12.9% 14.6% .

28% 76% .

80%) (

73%) : .

1.5% 45% .

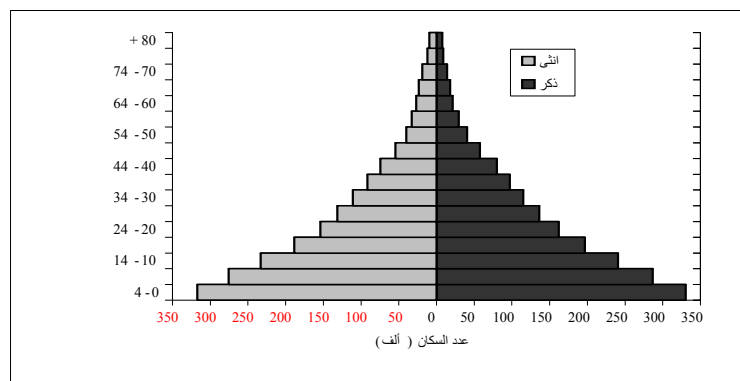
.%9 %14
 .%0.6
 .%1.5 :
 4.4 6.22 .%66
 .%3.6 %3.4 .
 %3.3 2004 :
 431 . %28
 %58 . %19.5
 90
 . 1249 . 80 :
 . 24365 3644
 . 135 22 :
 3876 %7.3
 %33 . %24 %15 %58
 .%36 . 1394.4
 :
 2003 %69 2004
 .%54 %383
 %11 :
 .(% %30) .2004
 11 17 2004
 .
 :
 .2004 274 .
 4566 1163 . 118.5 1180
 .
 %16

-1

2004 3.7
 %42.6 . %37 %63
 %65.5 %29.4
 .(9.8) %37.8
 2004 4.8
 .
 %14)
 %10.6 .(%13) ()
 (%1.1) .
 .(1)
 2004 %46.1 15 .
 .(1) %3.1 65

:1

2004



.2005 :

(%44.3 %49.2) 15
 .(%3.3 %2.6) (65)

8

.(15.2 17.6) 16.6

2

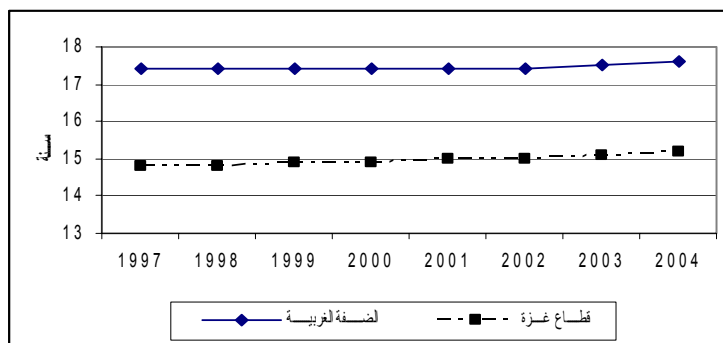
.2004-1997

16.6

16.4

:2

2004-1997 /



:(2005)

:

.2004

(

%3.9

%3.1)

%3.4

%3.6

.2004-1997

3

.2004-1997

(2003

5.6

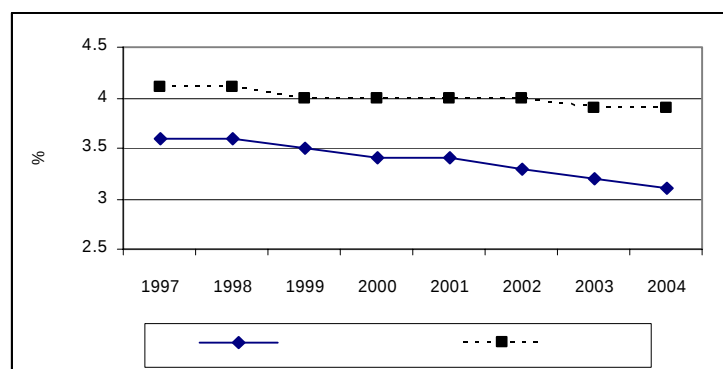
1997

6

.2000

:3

2004-1997



:(2005)

:

2004
 72.9 (71.2 71.6) 71.4
 .(72.2 73.3)

-2

1-2

.(2002 %64)

(
 .⁹ 5008
 2004
 %4.3
 %57 2003

%7.5 2004
 743
 1306
 234 (%87) 262 (%3.8)

552.2
 131 421
 %56 %2
 314.2 367.7
 53.5
2-2

.2004
 .
 .
 .
 .2003
 388 %20
 %61
 .2004 %39
 .(%4.1) (%27.5)
-3

2004
 .
 .
1-3
 %52) 2004 %61
 (%77
 %20) 2001
 .(1998

1500 2500
 1000 1700 1600 3000) 2004
 .(.
 %58 .
 %54 %60) 2004
 .
 %83 %97
 .(5)

2003

10

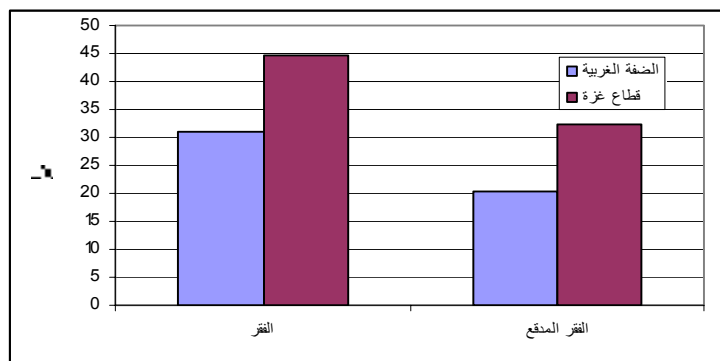
2003

(%36)

.(4)

:4

2003



- .2003

.2004

:

6

(%51)

.(%17)

%32)

.

.(6) ()

607) %16 ¹¹

.¹² 205 (

.

.

.

.(%22)

.

.

2-3

%81

(%67) 2004

(%52)

%21

%19 %27 %60

%17

.

()

.

.

.

.2003 ¹¹

() ¹²

. 77 128

6

(%15)

(%27) 12

. 12 %22.2 .

(%33)

. %17 12

.

3-3

18

%52.8 1.9 2004

%17.7 (3.7)

. 14-10 %13 9-5 %15.4

24.2 1999-1995 1000 25.5

.2003-1999 1000

%45.9 %33.7

.2003

%55.2 %38.6

.2003

2004/2003

%49.6 1,017,443

%51.6 %49.4

. %47.9

%29.3 (17-10) %37.0

. %10.3 %11.8 .

%42 2003

%29.4 . %48.5 %51.6

%49.9 %50.1) 18

.(

2004

%3.8 (17-5 %3.1) 40,139

. %1.9

. %0.7 %5.3

. (749) 2005
.1948 419 328
. 2472

310
. 8 2005

(2004)		:1
%9.9	(5)	
%4.9	(5)	
%2.8	(5)	
%11.0	(15-17)	
%10.8	(15-17)	
%8.4	(15-17)	
%7.1	(15-17)	
%6.3	(15-17)	

4-3

()
.2004 %22
. (%15)
%68 .(%14 %37)
(%27) (%56)
(%25) .()
. 300 (%32) 2004 100
. 22
. 67
(%42)
(%15) (%23)
. (%1) (%11)
67 ()
)
. 11 (33
22) (33) (45)

(%82) .(
 .(%69) (%91)
 (%49) .
 (%36 %57)
 . (%16) (%18)

-4

1-4

2004
 .%40.4 %40.3 2003
 .%36.4 %37.5 %42.5 %41.8
 .2004 %26.8 2003 %25.6
 .2003 %2.4
 .%3.4 %12.3
 .2004 2003 %5.7
 2004
 . %41 %40.3
 .%36.6 %36 %43.4 %42.6
 %48.9 . %31 %69
 %33.4 .
 .
 . %25.6 %26.7
 .
 2004
 .
 . %73.3 74.4%

%57.3

%58.9

.1999

%38.1

%26

.(

%0.7

%4.7)

%3.9

%25.9

2-4

2004

%20.2

%15.2

%30-19

%10.9 %9.4

%.%36.3

%38.1

3-4

49

48

.(

%9.3

)

%8.1

%15

%37.2

%.%22.5

%.%18

%8.3

%.%3.3

4-4

%26.7

%25.6

2004

%35.2)

%57.4

209

()

.(%21.3

%23.3

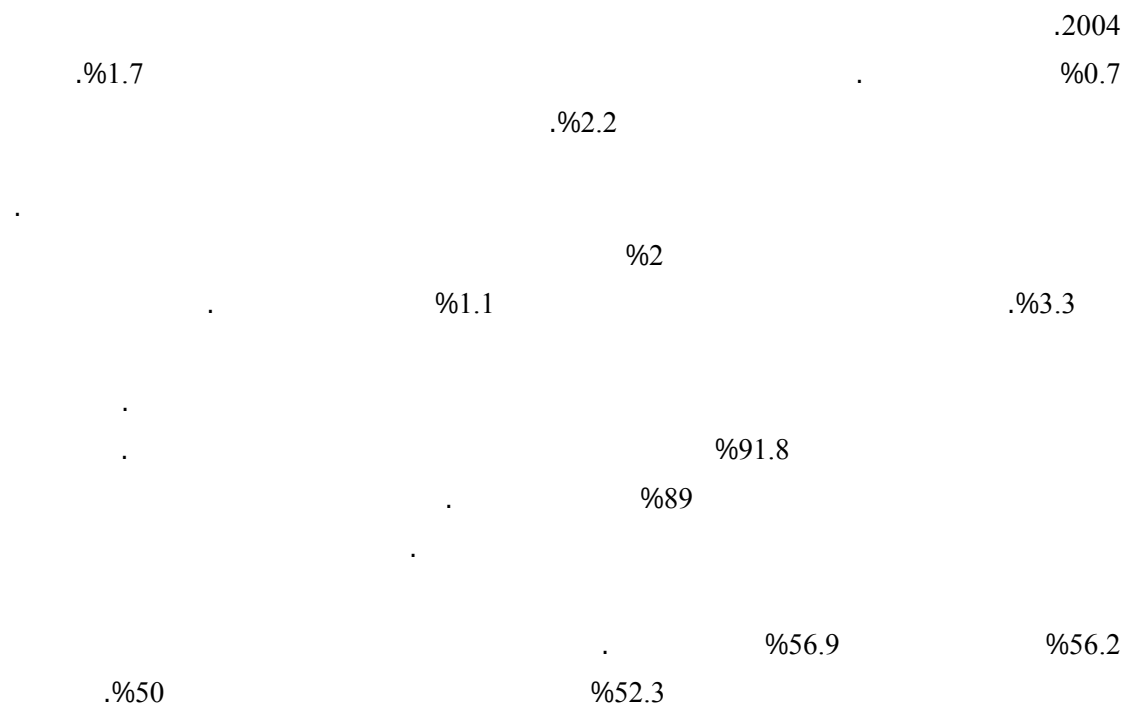
%42.6

%27.4

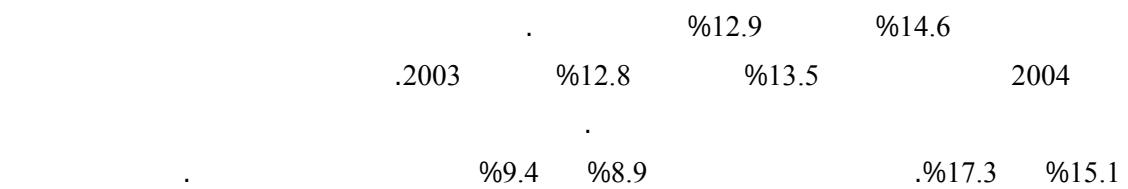
%.%19.5

%27.4

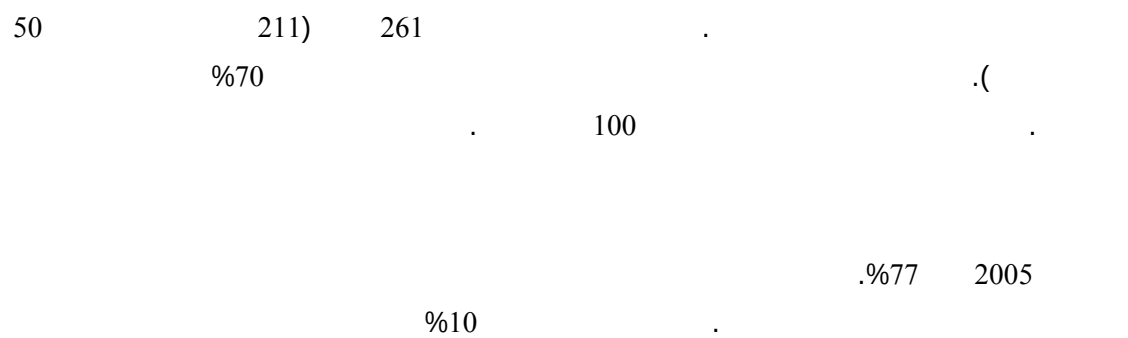
5-4



6-4



7-4



11%

2:

2005			
88,9	74,4	77,2	
88,0	52,7	59,8	
97,2	73,0	77,7	

-5

2005-2004

1,050,327) 2005/2004

28% .(

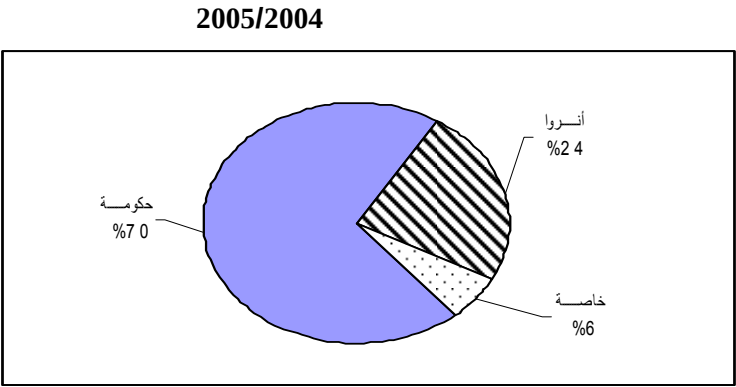
.(5)

2.5%

11.7%

(2004) .

5:



2004 :
2005/2004 -

34.5 .(42.7)

23.9
22.6
2005/2004
2004
1-5

318.6
2004
(257) %80
%88 ()
2004

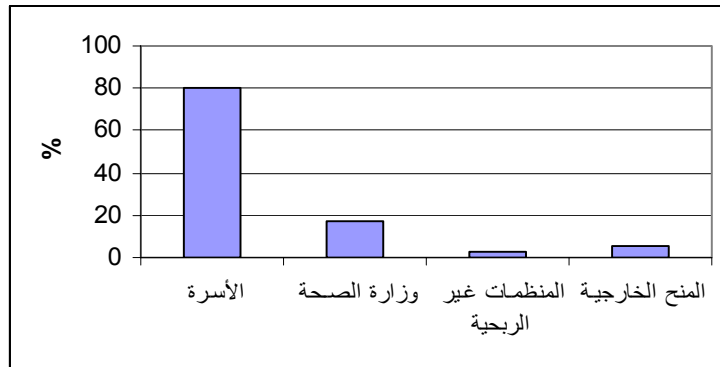
-6

2004/9/4-8/3
%13 2003 503
6 138
498) 399
(200
.2003 98.5
%13 %18 %55 :
126.2 %14
()
.2003 13.5

232.6
1031 44 49.4 (222.9)
(2005/3/20)

:6

2004



-2004

.2004

:

2003

)

.(

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1-6

2004

%76

.(

%66

%94

%52

%33

()

%4

%6

)

.¹⁴(

%2

%2

.(

)

2-6

()

(

%37)

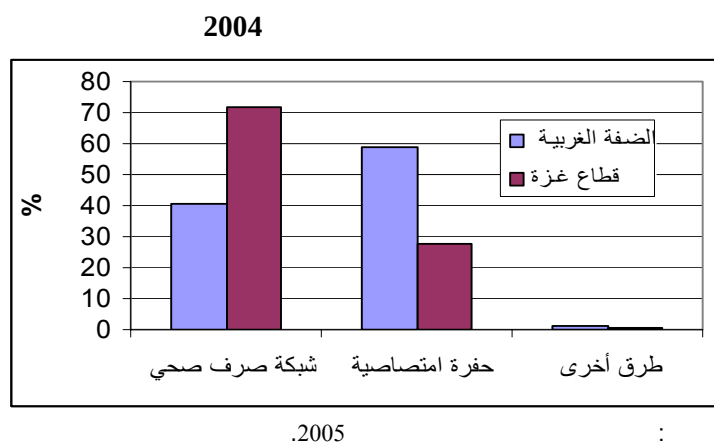
.(%43)

(%55)

%100

14

:8

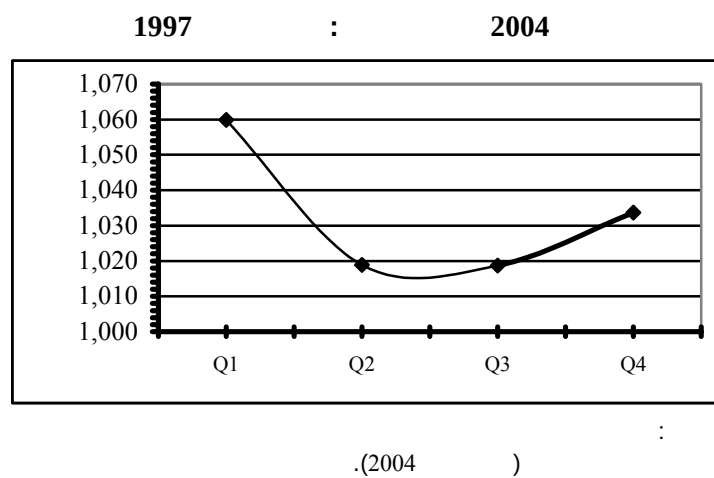


-7

1033 .2004 %1.5
 .%45
 %9 %14

2004
 (%4.4 %5) (%9 %7.6)

:9

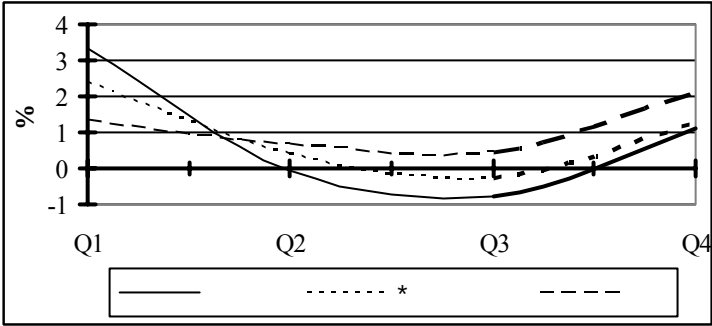


%22
 %6

.%1.11
(%2.38) %94.19

:11

.2004



2004

1-8

%2.29 %2.16

2004

4.4

6.22

%3.58

%3.44

%3.58 %3.27

%3.58

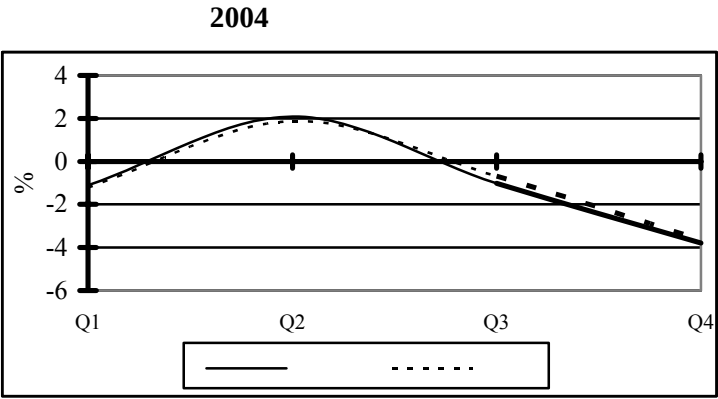
%3.44

:3

.2004

		2004
6.28	4.46	Q1
6.40	4.55	Q2
6.35	4.50	Q3
6.22	4.40	Q4

:12



-9

2004

2003

2004-1-15

12/1

2004

2003

2002

2001

2004

2004

2004

2004

2004

1-9

208

947.3

2004

%17.5

6.5
 .
 %11.5
 .
 %28.3
 .
 .
 2004
 .%17.5

2-9

361) 1444 2004
 . %2.9 1486 .(
 70 . 431
 (34) :
 .(23)¹⁵ .

15.6
 .
 2.4
 11 .2003
 46.1

250
 . 62.5
 .
 .2004 26

3-9

650
 2004 .(162.5)
 . %58
 2004 69
 2004
 .
 . 325

15
 () .

29.3

20

15.4

)

45

(

45.5

.2004

90.5

.(

%62

)

111.6

14.5

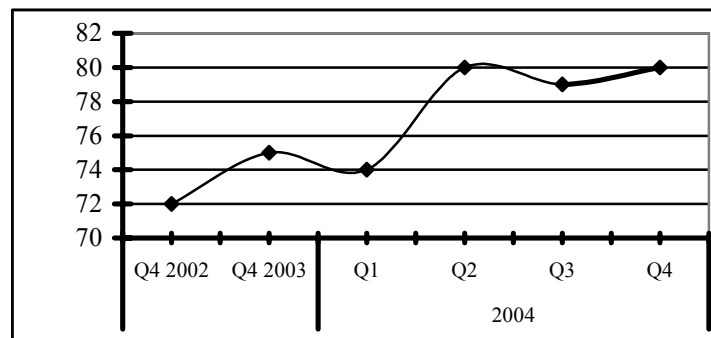
%68

:4

2004

(%)	2004 ()	2004 ()	
3.3	¹⁶ 208.1	201.5	
28.3	95.6	74.5	
(%11.5)	112.5	127	
3.2	437	423.5	
19.4	431	361	
7.5	222.6	207	-
(19.2)	46.07	57	-
54.2	96.4	62.5	-
191.1	13.1	4.5	-
76.3	52.9	30	-
-	¹⁷ 6	62.5	
(57.7)	68.7	162.5	
-	-	62.5	
101.1	90.5	45	
(67.8)	(14.5)	(45)	
-	-	(3)	

2004
2003
2004 :13



2004

) 23 . 80
14 () 43 (

2004

. %13 %87 . 1249 %2.7 2003
551 %6.8 362
. 336 %15.5 .%6

%19.4

%12 923 . 3644
%14 %25 2158
. 563

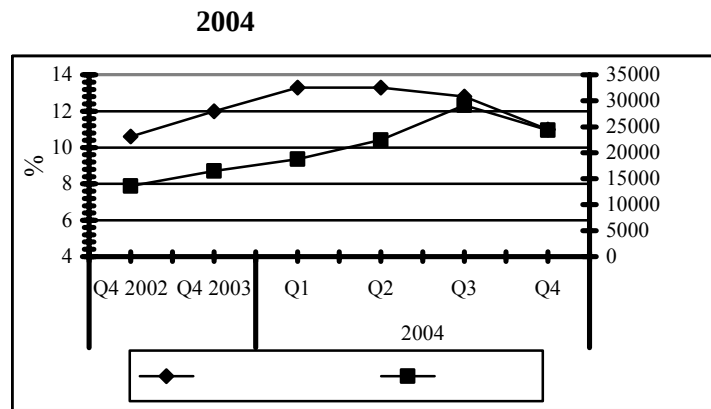
24365 2003

10657 (%40) 10560
. 3148 (%125) %41

%11 %12) 2004 2003

.(

:14



-11

(22) 2004

10 . 2003 133 135 .
72 11 62

1-11

2004

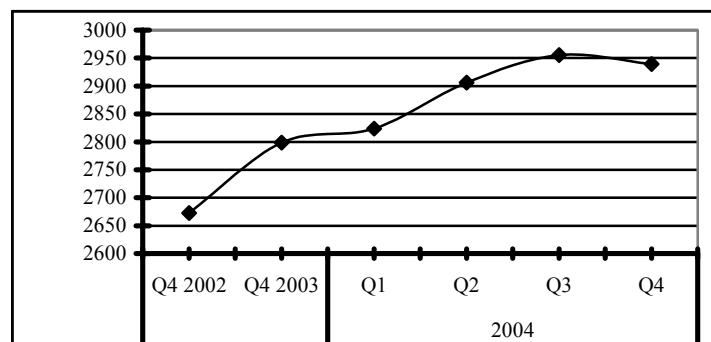
3876.2 2003 %7.3
%24 %76

2003

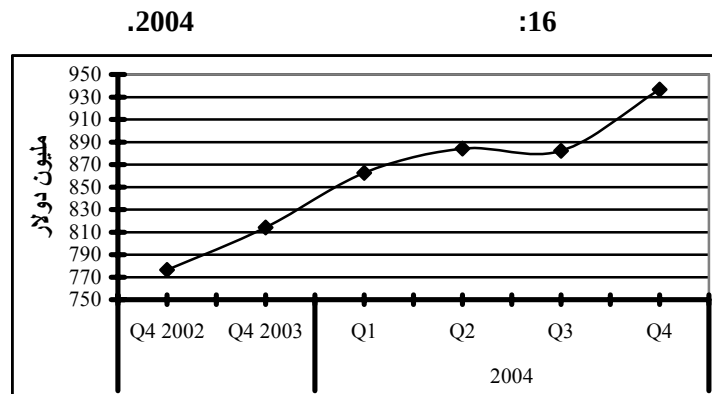
2939.5 (15) %5.1
.2004

.2004

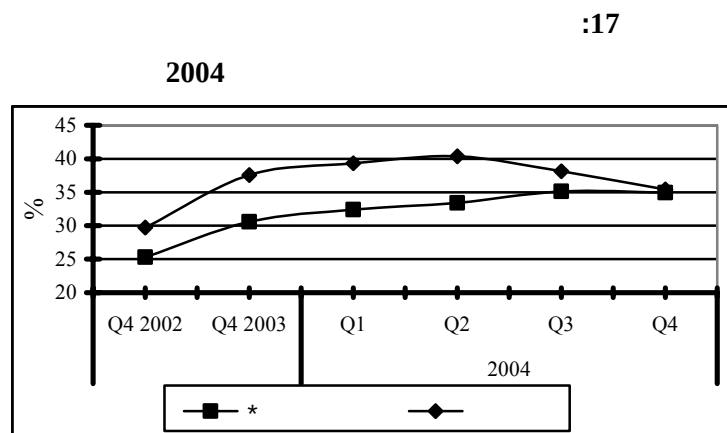
:15



2004 15.1% 936.8 (16) 2003



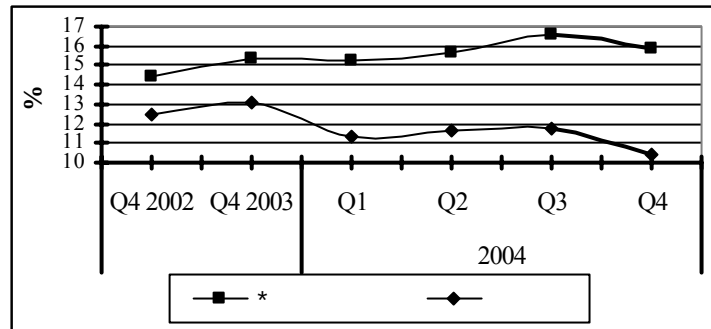
2004 34.9% 37.6% 35.4% 2003 (17) 2003 2004



2003 15.9% 2004 10.4% 15.3% 11.8% 13.1% 2003 (18)

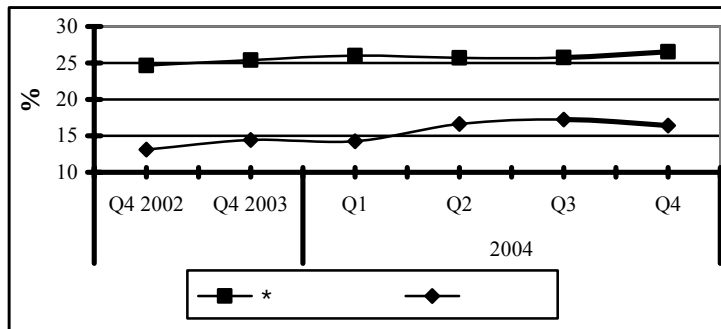
:18

.2004



:19

.2004



%25.4
%16.4

%26.5

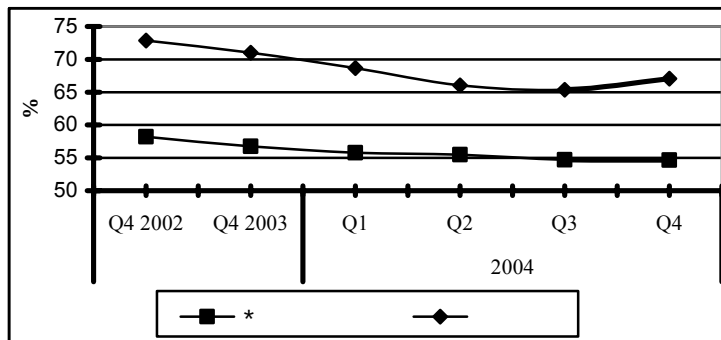
.2003

.2003

%14.4

:20

.2004



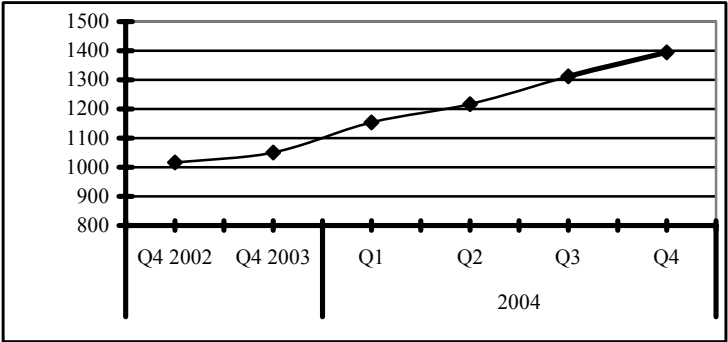
%71 %57 .2004 %67 %55

2-11

2004
%33 %6 1394.4 2003

:21

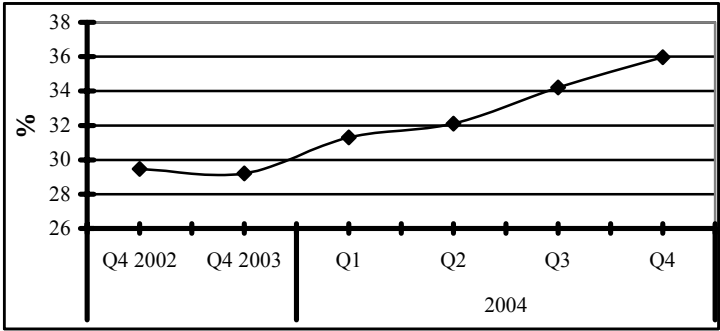
.2004



2004 .%29 .%36

:22

.2004



(Overdraft)

%52.8

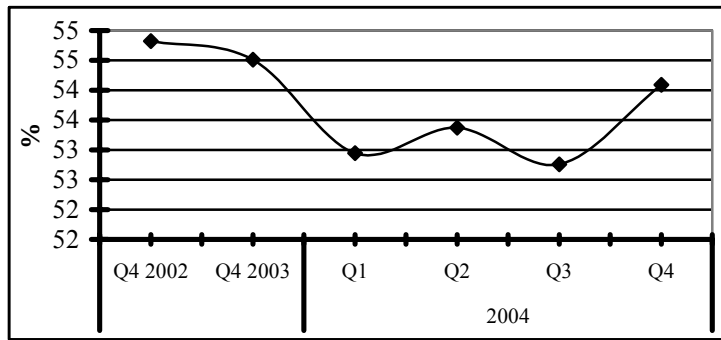
%54.1

2004

(22) .(%54.5)
.2004

:23

.2004



-12

2004

2004

%69

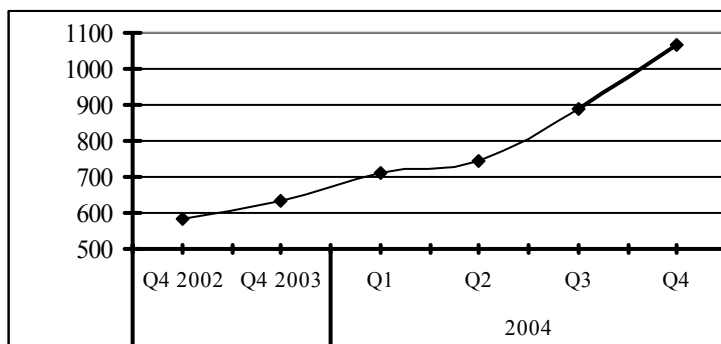
1064

.2004

2003

:24

2004



%383

(

60)

12.4

.2004

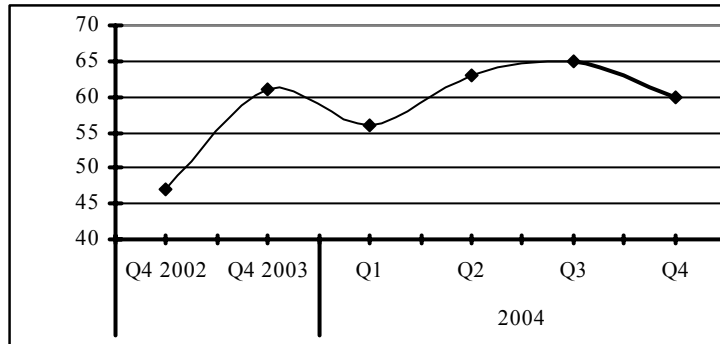
2003

42

208

:25

2004



277.56

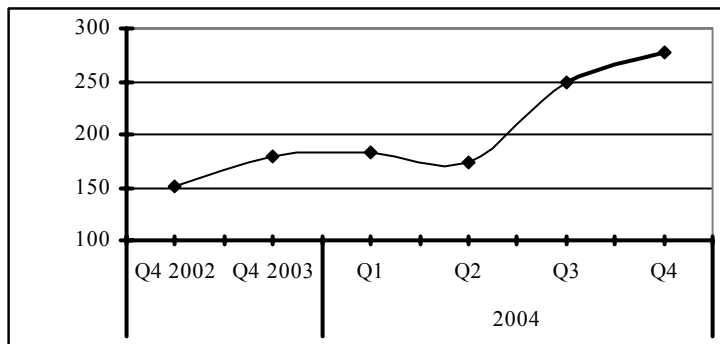
.2004 2003

%54

.2004

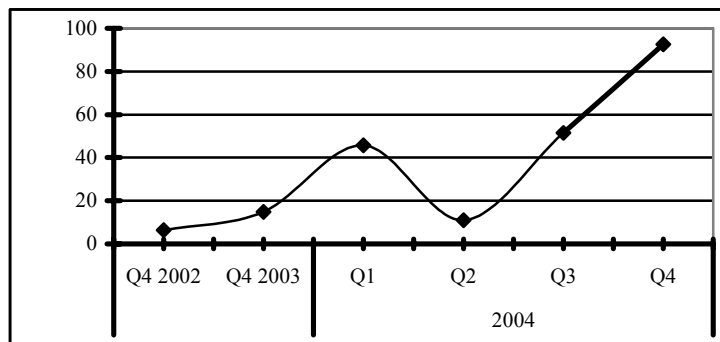
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<i>I</i>	<i>I</i>
2004/4/1	
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2004/4/1	
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 754 558 1312
 118,514 4,566 .
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72.2	33.1	40.8	
11.1	15.5	14.7	
-	5.4	4.3	
25.0	41.2	38.0	
41.7	32.4	34.2	
13.9	39.9	34.8	

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41	2004	:1
42	(2004-1997)	:2
43	2005/2004	:3
44	2004 1999 1996	:4
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2004

		/
100.0	3,699,767	
63.1	2,336,254	
6.8	250,452	
1.2	45,906	
4.5	165,405	
2.5	92,585	
1.7	61,129	
8.7	322,102	
7.4	275,593	
10.6	393,998	
1.1	41,589	
4.6	171,922	
13.9	515,573	
36.9	1,363,513	
7.0	260,013	
13.0	479,254	
5.3	197,380	
7.2	264,621	
4.4	162,245	

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(2004 - 1997)

2004	2003	2002	2001	2000	1999	1998	1997	
102.6	102.5	102.4	102.3	102.2	102.1	102.0	101.9	
97.6	98.6	99.5	100.0	100.6	101.0	101.3	101.3	
16.6	16.6	16.5	16.5	16.4	16.4	16.4	16.4	
38.1	838.	639.	240.	40.9	41.4	42.1	42.7	
4.1	4.2	4.3	4.4	4.5	4.6	4.8	4.9	
3.4	3.4	3.5	3.6	3.6	3.7	3.7	3.8	
—	5.6	—	—	—	5.9	-	6.0	
71.4	71.2	71.1	70.9	70.7	70.6	70.4	70.2	
72.9	72.7	72.6	72.4	72.2	72.1	71.9	71.7	
102.7	102.6	102.5	102.5	102.2	102.2	102.0	102.1	
91.7	92.6	93.4	93.9	94.3	94.6	94.7	94.7	
17.6	17.5	17.4	17.4	17.4	17.4	17.4	17.4	
35.4	36.3	37.3	38.0	38.8	39.6	40.4	41.2	
4.2	4.3	4.4	4.5	4.6	4.8	4.9	5.1	
3.1	3.2	3.3	3.4	3.4	3.5	3.6	3.6	
—	5.1	—	—	—	5.5	—	5.6	
71.6	71.4	71.3	71.1	71	70.8	70.6	70.4	
73.3	73.1	73.0	72.8	72.6	72.5	72.3	72.2	
4102.	102.4	102.3	101.8	101.7	101.6	101.5	101.5	
108.6	109.9	111.1	111.9	112.8	113.6	114.1	114.5	
15.2	15.1	15.0	15.0	14.9	14.9	14.8	14.8	
42.8	43.3	43.8	44.1	544.	44.7	45.1	45.4	
3.9	4.0	4.1	4.2	4.3	4.4	4.6	4.7	
3.9	3.9	4.0	4.0	4.0	4.0	4.1	4.1	
—	6.6	—	—	—	6.8	—	6.9	
71.1	70.9	70.8	70.6	70.4	70.2	70.1	69.9	
72.2	72.0	71.9	71.7	71.5	71.3	71.2	71	

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2005/2004

21292	33398	733735	1656	
5960	8075	254582	273	
2592	4945	62010	258	
29844	46417	1050327	2190	

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2004 1999 1996

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2004	1999	1996	
11.3	5.1	5.6	) (
1.2	1.2	1.6	()
1.1	1.9	1.8	
0.4	0.5	-	
1.5	0.2	1.3	
0.6	0.4	1.3	) (
1.5	0.4	1.2	
7.1	1.3	-	
0.3	-	-	
19.5	55.2	**54.2	/
10.9	18	18.8	
8.2	4.4	16.1	
56.6	-	-	
4.8			
29.5	43.2	40.2	
29.3	51.7	-	
30	10.7	-	/
20.7	10.7	-	
78.6	88.7	85.8	

. - .2004 .2005 :

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2004

98.3	97.1	97.5	
98.9	94.0	95.6	
97.9	93.4	94.9	
83.8	86.0	85.3	
83.3	83.3	83.3	

.2005

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:6

2003

57.9	30.9	
42.1	44.7	
50.8	32.0	
31.7	38.5	
17.5	41.2	
1.5	13.6	1
9.5	24.4	3-2
13.3	25.0	5-4
25.2	32.8	7-6
15.5	44.7	9-8
25.3	51.6	+10
90.6	36.2	
9.4	29.8	
44.6	36.6	
55.4	34.7	
37.0	43.3	
24.8	39.3	
20.0	36.6	
11.5	29.6	
3.7	22.0	
3.1	12.4	
70.3	34.5	
29.7	38.3	

- .2003 .2004 :



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Economic & Social

First Quarter 2005

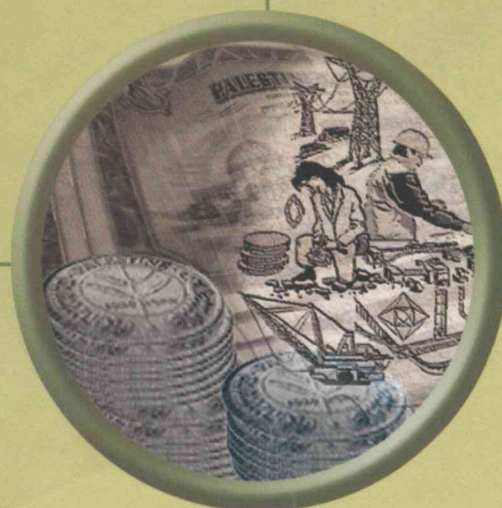


Volume (1)
April/2005



Palestinian Central Bureau of Statistics
(PCBS)

Monitor



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This issue of the *Economic & Social Monitor* was funded by
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April, 2005

FOREWORD

The Palestine Economic Policy Research Institute (MAS) and the Palestinian Central Bureau of Statistics (PCBS) are pleased to introduce the first quarterly issue of the combined Economic & Social Monitor. Since 1997 the two organisations have worked in partnership to assemble and analyse key socio-economic data for the benefit of policy makers, researchers and other interested parties. The Economic and Social Monitors have become a trusted reference guide for decision makers throughout Palestine, as they strive to formulate appropriate economic and social policies under changing and often difficult circumstances.

The ever-changing nature of the economic and social environment, and an improvement in capacity in data gathering and analysis, made the introduction of the quarterly monitors not only possible but necessary. As needs shift, trends develop, situations deteriorate or opportunities present themselves, it is vital that the public, private and NGO sectors are presented with the most up-to-date appraisal of events. As usual, this involves not only the collation of accurate statistics but their digestion and analysis by our team of experts. It is our intention not only to inform but to illuminate.

We hope this new Monitor succeeds in its mission, and we very much welcome any comments, suggestions or criticisms from its readers. We extend our appreciation to all those who have worked so hard to put it together, particularly the researchers from our two organisations for their cooperation and dedication. Finally, our sincere thanks go to the Ford Foundation and the Core Funding Group whose support of MAS and the PCBS (respectively) has made this issue possible.

Samir Abdullah
Director General- MAS

Luay Shabaneh
Chairman - PCBS

EXECUTIVE SUMMARY

The population of the West Bank and Gaza Strip increased in 2004 by 3.4%, reaching an estimated 3.7 million people by the end of the year. The data shows that the fertility rate is still high, and Palestinian society is still extremely young.

The number of building licenses issued in the fourth quarter of 2004 reached 1,306, an increase of 7.5% over the previous quarter. These licensed 552,000 m² of new buildings. However, the amount of cement imported to the Palestinian territory decreased by 20% to 388,000 tons. 61% of the imported cement was for the West Bank and 39% was for the Gaza Strip.

Despite slight improvements in some economic indicators the fourth quarter of 2004, poverty was widespread and is likely to remain so. 61% of households in the West Bank and Gaza Strip were below the poverty line, and half reported they had lost more than half their pre-*Intifada* income. 22% of Palestinian households received emergency assistance during the fourth quarter of 2004, mostly in the form of food.

The overall labour-force participation rate in the Palestinian territory increased in the fourth quarter to 41.0%, with female participation up to 14.6% from 12.9% in the previous quarter. The unemployment rate declined to reach 25.6% from 26.8% in the previous quarter, despite a decrease in the number of workers in Israel from 58,000 to 49,000. The number of paid employees in economic establishments decreased, showing a growth in the family character of these establishments. Employment in the agricultural sector increased because of the good olive season of 2004.

28% of the whole population are in schools, most of them run by the government.

The data show that 76% of the Palestinians have health insurance, and household expenditure accounts for 80% of the total spent on health.

73% of Palestinian households have access to the public water network, but only around half are connected to the sewerage system. The quality of water is worsening in Gaza, with salinity levels rising. One third of families there rely on purchasing water from tankers for drinking.

Gross Domestic Product was estimated to have increased in the West Bank and Gaza Strip by 1.5% in the fourth quarter of 2004. Services contributed 45% of GDP, Industry 14% and Agriculture and Fishing 9%. GDP per capita increased by 0.6% in the same period.

The inflation rate in the Palestinian territory was 1.5%, 66% of this increase accounted for by food prices. Both the Jordanian Dinar and the US Dollar depreciated against the Israeli Shekel, reaching 6.2 and 4.4 NIS respectively. The purchasing power of the Dinar declined by 3.4% and the Dollar by 3.6%.

Government revenues increased by 3.3% in the fourth quarter compared with the budget, due to a 28% increase in domestic revenues. Current and capital expenditure reached \$431 million, an increase of 19.5% compared with the estimated value in the budget. Israel transferred \$90 million of clearance revenues, some of which was owed from previous years. However, donor assistance amounted to 58% less than what was expected.

The number of operating hotels in the Palestinian territory increased to reach 80, with 1,249 workers, 3644 available rooms and 24,365 guests.

There were 22 banks operating in the Palestinian market with 135 branches. Total deposits increased by 7.3% to reach US\$3,876 million, 58% of it in US Dollars, 15% in Israeli Shekels and 24% in Jordanian Dinars. Credit facilities increased by 33% to reach \$1,394.4 million.

The market value of registered companies on the Palestine stock exchange increased by 69% in the fourth quarter of 2004 compared with the same quarter of 2003. The number of deals increased by 383% and the price of stocks increased by 54%.

11% of Palestinian households in the West Bank and Gaza Strip were victims of crime during the fourth quarter of 2004.

17 economic and financial laws were published during 2004 and 11 laws are in progress in the Palestinian Legislative Council.

Israeli policies and actions caused major humanitarian losses and much damage to infrastructure. 274 people were killed in the fourth quarter of 2004, 1,180 houses were destroyed by Israeli military forces and 1163 establishments were damaged. Israeli military machines felled 118,500 trees and destroyed 4,566,000 m² of land in the same period.

The annexation and expansion wall continued to have negative effects on the Palestinian people. 16% of those near its path moved homes because of the wall and half of households had difficulty reaching health services. Many students were prevented from reaching school and had to find alternative ways to reach their educational institutions.