



아프리카지역 불어권 5 개국
(알제리, 튀니지, 모로코, 세네갈, 코트디부아르)
협력방안 연구 : 세네갈

Abstract



Senegal is a gateway to West Africa that stretches over 190,000km² and borders five countries, including Mauritania and Mali. Renowned for its unique culture and sociopolitical stability, Senegal has a population of 1.3 million, which is multi-ethnic and predominantly Islam.

Senegal has strengthened economic and diplomatic ties with Korea through 2009 and 2015 summits, from which it extended development cooperation in agriculture/fisheries, water and sanitation, education, and public administration. Further to this effort, Senegal has been newly selected as one of Korea's priority partner countries for official development assistance. KOICA has thus pursued this research project in order to reinforce bilateral relations through a systematic implementation of grant aid projects.

In pursuit of setting the course for KOICA's future development cooperation with Senegal, the research project reviewed Senegal's development environment and national development strategy along with the international community's assistance trends. In order to establish an overarching strategic framework and specific action plans, the research team utilized a variety of measures, such as quantitative analysis, literature review, interviews and meetings with experts, and field study. The research project holds great significance as a comprehensive analysis on local demands that weaved in results from a field study and quantitative analysis. Senegal's development needs and Korea's capacity for ODA assistance were drawn from gaps between Senegal and benchmarking countries, as measured by key indicators in relevant sectors.

Through an in-depth analysis on Senegal's socioeconomic and political environment as well as on sectoral development conditions, the research team has identified Senegal's national development challenges as follows:

- Chronic twin deficits
- Services-oriented industrial structure
- Labor supply and demand mismatch
- Regional disparity in basic human needs (i.e. water, education, health)
- Unmet potential as an ICT-Education-Medical Hub in West Africa

Senegal has persistently run a current account deficit and fiscal deficit on account of the primary industry-centered export structure (groundnuts and marine products being the main commodities) as well as high public investment and government wage bills. As a result, GDP growth rate during 2006-2013 remained considerably below the regional average at 3.3%. In addition, developing skills and building infrastructure in the service sector have been a part of the national agenda, as the tertiary sector's share of GDP remains high at 62%. Moreover, the need to improve agricultural productivity and transfer agricultural workforce into other industries has widened due to the labor supply and demand mismatch, whereby 77.5% of the total labor force works in the agricultural sector, which only contributes 13.7% to the GDP.

Regional disparity in population distribution, economic activity, social and economic infrastructure is another feature of Senegal. The regional disparity in food security and poverty worsened as most economic activity became centralized in Dakar and the central and western regions of Senegal. Moreover, gender inequality persists across the social sphere, such as health, human capacity development, and economic participation. In particular, regions outside urban cities and river basins like the Senegal River Valley and Lake Guiers (i.e. central, eastern and southern inland regions) have been marginalized with respect to access to water supplies, basic education and health services. Notwithstanding these issues, Senegal has built a strong ICT infrastructure whilst taking advantage of its advanced communications environment. Senegal has also positioned itself as an education and medical hub in the region, which it can

further develop and leverage by advancing the ICT technology. The government is currently constructing a high-tech digital education and medical complex in Diamniadio, which is in the outskirts of Dakar, and near the new airport site, Diass.

In order to tackle the aforementioned challenges, the government of Senegal announced the 'Emerging Senegal Plan (Plan Sénégal Emergent; PSE)' in February 2014 and laid out blueprints for socioeconomic development during 2014-2035. PSE aims to raise the annual growth rate from the current level of 4.6% to 7-8% within the next four years, and lower the budget deficit from 5.4% to 3.9% until 2018. Senegal founded PSE upon the following strategic axis in order to take-off as an emerging economy by 2035.

Pillar I: Structural transformation of the economy and growth

Pillar II: Human capital, social protection and sustainable development

Pillar III: Governance, institutions, peace and security

The government of Senegal also devised a 'Priority Actions Plan (Plan d'Action Prioritaire; PAP)' for the first phase of PSE, which stems from 2014 to 2018. The public component of PAP comprises of six main sectors, including ① infrastructure and transport services, ②energy, ③agriculture, ④education and training, ⑤water and sanitation, ⑥health, and pivots on 27 flagship projects and 17 reforms. These projects and reforms are also tied to the following objectives: ①macroeconomic stability, ②economic growth, ③social protection, ④accessibility to social services, ⑤public administration reform, ⑥good governance, ⑦local development, peace and security, decentralization, and regional integration. In an effort to secure finances for the PAP, Senegal has raised a total of 7.8 billion USD (372.9 billion CFA), above the initial goal of 6.2 billion USD.

Furthermore, Senegal has shaped sectoral strategies in education, agriculture, health, water and sanitation. Senegal has formulated a Program for Improving Quality, Equity and Transparency in Education and Training for 2013-2025 (Programme d'Amélioration de la Qualité, de l'Équité et de la Transparence du Secteur de l'Éducation et de la Formation; PAQUET) in order to boost the primary enrolment rate to 98% and the completion rate to 96% by 2018. It has also reformulated the national agricultural development policy by establishing an Accelerated Program for Agriculture in Senegal for 2014-2017 (Programme d'Accélération de la Cadence de l'Agriculture Sénégalaise; PRACAS). The overall goal of PRACAS is to promote self-sufficiency and to increase exports of rice, onions, groundnuts and vegetables. Pursuant to this goal, the main objectives are ①modernization of family farming through training farmers, improving access to finance and mechanization, ②promotion of agricultural entrepreneurship and environmentally-friendly agro-business, ③promotion of job creation and participation of women and youth in agriculture through improving technology and equipment, ④building resilience of vulnerable groups. The 2009-2018 National Health Plan (Plan National de Développement Sanitaire; PNDS) aims to achieve 80% infant immunization rate, reduce maternal, infant and juvenile mortality, reduce HIV/AIDS rates, improve governance in the health sector, and introduce a universal healthcare system for the underprivileged. Lastly, the Millennium Water and Sanitation Program (Programme d'Eau Potable et d'Assainissement du Millénaire; PEPAM) was drafted in 2005 as a cooperation framework in the water and sanitation sector in order to improve accessibility to safe water and sanitation facilities in both urban and rural areas.

International community has joined Senegal's efforts towards achieving the development plan. The total ODA amount in the past ten years averaged 1 billion USD, and Senegal has also benefited from a debt relief of 3.2 billion USD in 2006. Further breakdown of Senegal's ODA by sector shows that social infrastructure and service (i.e. education, health, water and sanitation) accounts

for 44% of the total ODA, followed by economic infrastructure and service (16%), program support (13%), production (12%), cross-cutting issues (9%), and humanitarian assistance (3%). In terms of types of ODA, budget support amounted to 18.32%, while projects amounted to 65.41% of the total ODA. Of the donors, France, Spain, EU and AfDB provided general budget support, while Canada, Netherlands, World Bank and EU provided sectoral budget support. 34.56% of the total budget support came from France while 26.79% of project support came from the U.S.

France, United States and Japan are among the major donors, while the World Bank (IDA), EU, AfDB stand out from the multilateral agencies. Meanwhile, Korea ranked 8th among bilateral partners, with respect to the average amount of aid during 2011-2013. AFD is the largest donor agency which has been supporting Senegal since 1946. It is mainly focused on sustainable development (agriculture, environment, water and sanitation), democratic governance, and human development (education and health), under the Partnership Framework Document (DCP). USAID supports 500 million USD for health, economic growth, education, democratization and governance, based on the Country Development Cooperation Strategy (CDCS, 2012-2016). JICA Senegal Office is the oldest office in francophone Africa and therefore has ample experience and capacity. It aims to promote economic and sustainable growth and basic social services centered on education, health, agriculture, fisheries, and infrastructure. CTB focuses on health, water and sanitation to improve the living conditions of the rural population in extreme poverty.

World Bank supports strengthening governance, acceleration of growth and job creation, improvement of education·health·water and sanitation services in compliance with the Country Assistance Strategy (CAS, 2013-2017). EU pledged 347 million Euros under the 11th National Indicative Programme (NIP, 2014-2020) in order to support democratic governance, sustainable agriculture and food

security, water and sanitation. AfDB follows the Country Strategy Papers (CSP, 2010-2015) and mainly supports infrastructure, governance, water and sanitation, and rural development. UNDP focuses on improving governance to achieve MDGs, combating poverty by creating economic development opportunities, adapting to climate change for sustainable development, under the Country Programme Document (CPD, 2012-2016). FAO operates under the Country Programming Framework (CPP, 2013-2017), which supports governance for food security, enhancement of agricultural products' productivity and competitiveness, management and restoration of natural resources and the environment, and building resilience through establishing a prevention and management system for food and nutrition crises.

KOICA Senegal Office concentrated its efforts on invitational training and volunteer program upon opening in 2008, and has henceforth implemented two projects during 2010-2013 and two agricultural projects in 2014. KOICA plans on establishing a vocational training center and implementing the water and sanitation project in 2015. Areas of cooperation include agriculture and rural development, education, health (water and sanitation) and fisheries. Furthermore, KOICA plans to launch phase II projects of the irrigation project and water and sanitation project as well as a new project in higher education, a field where there has been a high demand from the recipient country. Aside from KOICA, EDCF has provided assistance through Government ICT Infrastructure Establishment Project and Marine Infrastructure Establishment Project (MIEP), while the Ministry of Agriculture, Food and Rural Affairs operated through KOPIA and KAFACI. The Ministry of Oceans and Fisheries has been cooperating with Senegal by exchanging information and experts, building partnership in research, establishing sea surveillance system, and forging a public-private partnership in the fisheries sector.

The research further laid out KOICA's cooperation framework for Senegal based on the analyses on Senegal's development environment and policy, trends and traits of international communities' assistance, and Korea's ODA outcomes.

A new direction of KOICA's cooperation strategy in Senegal should be ①to establish the basis for economic development and ②to reduce regional disparity. It is thereby strongly recommended that the first strategic priority be to build a basis for agricultural and industrial growth, while the second strategic priority should be to solve the socioeconomic gap between rural and urban areas.

Despite President Macky Sall's strong leadership, growth has remained at 3-4% in recent years and the twin deficit condition has exacerbated, while regional disparity worsened. As PSE puts forward agriculture and food, housing, resource development and tourism as key growth engines, it is advisable that KOICA supports enhancing productivity in the traditional industry (i.e. agriculture and fisheries) and training professionals in the service industry (i.e. tourism, ICT, medicine), as these could contribute for solidifying the base for economic development. Strong emphasis should be placed on increasing productivity in the agriculture and fisheries sector that has considerable labor force as well as on raising more professionals in the service sector, which accounts for 60% of GDP. Furthermore, greater attention should be drawn upon the eastern and southern areas that fall behind on key measures of basic human needs (water and sanitation, education, health) and show extremely severe poverty rates. Taking this into account, KOICA should provide assistance to solve regional disparity in basic services and to realize inclusive and pro-poor development.

Education, agriculture/fisheries and health have been identified as the priority sectors after a careful synthesis of quantitative and qualitative analyses. Education is not only KOICA's top priority sector, but also the nation's priority, especially as there has been a growing emphasis on higher education as a

means to tackle youth employment. Moreover, Senegal has a strong initiative to absorb demands for training a professional workforce in the region. The order of priority also stems from the fact that multiple projects (such as the vocational training center, Cyber University and digital open space) are placed in KOICA's pipeline and can be successfully implemented with strong support from the Ministry of Higher Education.

Agriculture has also been selected as a top priority for KOICA along with education, due to its importance in national development and Korea-Senegal bilateral relations. The sector takes up the largest share in the economy and national development strategy yet poses vulnerability, especially in terms of climate change in the Sahel region. KOICA's success in the projects on irrigation development and agricultural productivity in Grande-Digue Tellel and Podor has been catalyzed by the Ministry of Agriculture and Rural Equipment's activeness and high willingness to cooperate. Future projects, such as the project for strengthening sustainability of the rice value chain, will likely benefit from these settings.

Greater need of assistance has risen in the health sector in recent years, especially due to increasing demands to address water scarcity, which has been aggravating with climate change and salinization, and building capacity in the sector in order to combat challenges like the Ebola crisis. High-level officials at line ministries, such as the Ministry of Health and the Ministry of Water and Sanitation, have been keen on improving accessibility to health services as well as to water and sanitation, especially for the rural area. Such agenda can be complemented by a second phase of KOICA's water and sanitation project, which has received positive feedback from local stakeholders.

The sectoral cooperation program and plans are as follows.

With regards to education, the main goal is to improve accessibility in education and training human resources. Projects that may fulfill these goals are ①project for vocational training, ②project for improving e-education, ③project for strengthening secondary education in STEM, ④project for promoting participation of women and underprivileged in education. These projects may benefit from partnering with multilateral or bilateral agencies that possess ample experience and capacity. In the mid- to long-term, KOICA could promote trilateral cooperation in vocational training.

In case of agriculture, the overarching goal should be to achieve integrated agricultural and rural development in the Senegal River Valley. Along with existing projects (project for developing irrigation to secure agricultural land and the project for increasing productivity of rice and onions and training farmers), KOICA should pursue a new project in the northern region that applies an agro-business growth model to strengthen value chain and marketing in order to promote private investment for agricultural development. For the fisheries sector, KOICA should build capacity for human resources and planning & evaluation functions to support EDCF and Ministry of Oceans and Fisheries projects in the short term. In the mid- to long-term, it is advisable to pursue a project for transferring mariculture technology, depending on the level of relevant infrastructure and technology.

As for the health sector, the main goal is to improve access to health, water and sanitation, especially in the rural area. As such, the following projects are recommended: ①community-driven water and sanitation project and ②training maternal and child healthcare professionals. Phase II project of the water and sanitation project may be pursued as a stand-alone project, while it may be preferable to implement the experts' training project in partnership with a donor agency or NGOs.

Senegal has urgent needs for widening accessibility to health, water and sanitation as well as securing national food security through producing rice and vegetables that may lead directly to survival of the rural population in the short term. In the mid- to long-term, KOICA should help widen the sector's contribution to the economy through providing water sources to increase rural households' income and export potential of agricultural products. Moreover, KOICA should alleviate youth unemployment through establishing a regional higher education and vocational training center in the short term. KOICA should also support Senegal in its efforts to build an education hub in the knowledge city and raise professional labor force in the West African region in the mid- to long-term.

The following policy recommendations were made in support of KOICA's cooperation strategy for Senegal and in hopes to strengthen KOICA's cooperation with francophone Africa.

First and foremost, KOICA should establish a representative office for francophone Africa in order to address conflict and insecurity in the region as well as the challenges that stem from linguistic and cultural differences. It is appropriate that KOICA Senegal Office takes up on that role in Sub-Saharan Africa. The representative office is designed to support newly-established office in francophone Africa in the long term. In order to strengthen the role of the office, KOICA should place a wide range of field experts and raise local staffs to the managerial levels. For instance, local staffs at the World Bank Côte d'Ivoire Country Office carry out key functions as Portfolio Manager or Country Economist. JICA Senegal Office has been assisting neighboring and newly-established offices in francophone Africa as the oldest office. Furthermore, KOICA Senegal Office could also play the role as a model office for testing innovative modalities, such as trilateral cooperation and budget support. Upon considering the Senegalese government's readiness and activeness in using its

own financial and procurement system with other donors, KOICA should contemplate introducing budget support to certain sectors and/or make direct reimbursement to government agencies.

Secondly, KOICA should strengthen ties with the central government agency that oversees ODA in order to deepen development cooperation with Senegal as a priority partner country. It is highly desirable that KOICA expands existing quarterly meetings with the Ministry of Economy, Finance and Planning (Ministère de l'Economie, des Finances et du Plan; MEFP), the central government agency in charge of ODA projects, and hold quarterly project progress meetings, where, as in the case of other donor agencies, main stakeholders from government agencies come together to review projects. In addition, KOICA should hold annual evaluation workshop with MEFP. It is also advisable for KOICA to hold regular progress meetings and strengthen partnership with the agency in charge of technical cooperation, Direction of Technical Cooperation (Direction de la Coopération Technique; DCT), to share main outcomes with volunteers, experts, trainees and stakeholders at line ministries. Such meetings will be beneficial for sharing information at the higher ministerial level as well as for improving publicity to the general public.

Thirdly, KOICA should regularly participate in the thematic working groups on key sectors of cooperation (education, agriculture/fisheries and health) in order to expand multi/bi cooperation. While the donor coordination framework (PTF) is actively set in Senegal, the thematic working group for higher education has not yet been founded, despite high demands. KOICA could thus spearhead the sector by establishing the higher education working group in cooperation with the World Bank, AfDB, AFD, and other partners.

Lastly, KOICA should strengthen the capacity of Korean experts and project implementation agencies (such as the development consultancy, etc.) in order to

enhance aid effectiveness in francophone Africa. KOICA should make reference to JICA's program on providing French and local language classes, pairing French speaking junior and senior consultants, obliging cooperation with local experts and specialized agencies. It is worth noting that over half of the experts and staffs involved in JICA's Senegal projects are former volunteers in Senegal.