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IN-DEPTH EVALUATION OF UNIDO'S INDUSTRIAL  
HUMAN RESOURCE DEVELOPMENT ACTIVITIES

US/GLO/91/159

Country case study: Sénégal\*

Prepared by the  
Evaluation Staff  
Office of the Director-General

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\* This document has not been edited.

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**ABBREVIATIONS**

<b>AFORG</b>	<b>Association pour la Formation au Sénégal</b>
<b>CNQP</b>	<b>Centre national de Qualification professionnelle</b>
<b>MEFP</b>	<b>Ministère de l'Économie, de la Finance et du Plan</b>
<b>MICA</b>	<b>Ministère de l'Industrie, du Commerce et de l'Artisanat</b>
<b>MTFP</b>	<b>Ministère du Travail et de la Formation professionnelle</b>
<b>ODA</b>	<b>Official Development Assistance</b>
<b>ONFP</b>	<b>Office national de Formation professionnelle</b>
<b>PDRH</b>	<b>Programme pour le Développement des Ressources humaines (IDA/World Bank)</b>
<b>PME/PMI</b>	<b>Petites et moyennes entreprises/industries</b>
<b>SME/SMI</b>	<b>Small and medium-sized enterprises/industries</b>
<b>SONEPI</b>	<b>Société nationale d'Étude et de Promotion industrielle</b>
<b>VT</b>	<b>Vocational training</b>

## **1. SOCIAL, ECONOMIC AND INDUSTRIAL CONTEXT**

### **General**

1. The demographic census of 1988 indicates that in the previous twelve years the resident population in Sénégal had grown at an average rate of 2.7% per year. A high fertility rate which has remained basically stable over the intercensal period and a steady decrease in mortality rate suggest that the natural rate of demographic growth is not likely to decrease in the near future and may in fact be increasing.<sup>1</sup> The population is ethnically diversified with one dominant group, Wolof, representing 43.7% of the total population while Poular (Peulh and Toucouleur) make up 23.2%, Serere 14.8%, Diola 5.5%, and Mandingue 4.6%. Although French is the official language and is widely used in cities, Wolof is a sort of lingua franca for most of the population. The usage of French decreases in rural areas and a share of the population is known as not speaking or understanding the language.
2. The net impact of immigration from neighbouring states and of emigration toward these states and increasingly toward industrialized countries on the resident population is unknown but it is estimated that between 600,000 and 750,000 Senegalese live outside the nation borders.
3. Urban population represented 32% of the total resident population in 1960 and 38% in 1990. This slow increase in the relative share of urban dwellers may be surprising to observers who have seen the increasing urbanization of the region of Dakar with 22% of the country population. Since data from the census indicates that over the last intercensal period, urban population has grown at a rate 50% higher than rural population, Sénégal may be on the edge of its demographic transition from a rural to an urban society.
4. According to the UN Human Development Report 1992 (UNHDR 92), the adult literacy rate in 1990 was 38.3% while it was only 12% in 1970. Notable differences exist between the levels of literacy of adult males (52%) and adult females (25%): females represented 1.5 million of the 2.5 million individuals who could neither read or write. Illiterate adults are probably concentrated in the older age groups which account for the low number of average years of schooling for both for adult males (1.3) and adult females (0.4).

### **Economic Structure**

5. At the time of independence, Sénégal was the industrial centre of West Africa. Since then, its economic performance has been disappointing: its economic growth has been the slowest of any African country untouched by war or civil strife. Annual GDP growth averaged 2.3% during 1965-80 and slightly less than 3.0% during 1980-90.<sup>2</sup> Despite this modest economic growth, the structure of the Senegalese economy suggests an economy in a state of long term stasis.
6. Sénégal has been extremely successful in attracting foreign aid for geographical (strategic position and specific conditions of the Sahel), political and religious reasons: with 1.5% of the total Subsaharan population, it attracted 4.8% of total official net assistance to the region in 1987 and between 1980 and 1987 aid commitments grew by 18% a year, more than twice as fast as total ODA.

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<sup>1</sup> The ratio of the demographic growth rate for the period 1985-90 over the period 1960-65 is 111, indicating a slow but steady acceleration of demographic growth.

<sup>2</sup> Data from World Development Report 1992, The World Bank. Nevertheless, there are reasons to be sceptical about these figures. The World Bank in March-April 1990 sent a statistician to examine the Senegalese national accounts and the resulting report pointed out to the existence of two sets of official data, one produced by the Direction de la Statistique and the other by the Direction de la Prévision Économique, each yielding different pictures of the economic situation.

7. Agriculture is still an important element of the Senegalese economy and occupies the majority of the population. But its low productivity and the low value added of its output limits its contribution to GDP to 21% only, down from 25% in 1965. The industrial sector share of GDP has remained stable between 1965 and 1990 at 18% while the share of manufacturing has regressed from 14% to 13% over the same period. The largest contribution to GDP originates in the services sector which has increased its share from 56% to 61% of GDP, an importance in the national economy largely resulting from the role of public administration.

8. The Senegalese state has traditionally played a major role in controlling the production and distribution of the output of some subsectors. Public utilities are still state-owned enterprises. Basic commodities were either subject to price controls or, as in the case of rice, the responsibility of a commercialization board. The state also controlled the sectoral allocation of credit through a system of government-controlled banks.

9. In the mid-seventies, the Senegalese state benefitting from an improvement of fiscal receipts due to improved prices in the markets for groundnut and phosphates increased its direct participation in industrial productive activities to accelerate the rate of industrialization. The majority of the capital of the four largest French-owned peanut-oil producers was acquired and consolidated within a holding company, the SONACOS. Other capital participations were made in the phosphate sector where 50% of the capital of two mining companies (CSPT and SSPT) was acquired, in a marine salt company (Salines du Siné-Saloum), in a slaughter house (SERAS), and in cotton processing (SODEFITEX). At the same time, the Senegalese state undertook an important role in the financing of large projects in iron ore exploitation (MIFERSO), in marine construction (Dakar Marine), fertilizers (ICS), textile and apparel (SOTEXKA).

**Table 1: State Capital Share: 1985**

CSP Taiba	50.0%
CSP Thiès	50.0%
I.C.S.	23.3%
SONACOS	43.8% (CPSB and BNDS: 47.4%)
Dakar Marine	90.5%
SOTEXKA	41.3% (28.1% after 1985)
Others	N.A.

10. With its sluggish economy and increasing dependence on imports, it is not surprising that Sénégal has a long record of formal effort in policy reform aimed at structural adjustment: its 1980 structural adjustment loan (SAL) was one of the first granted by the World Bank and in 1992 the process of reform has yet to be completed.

11. In 1986, after having suspended its participation in the structural adjustment program for a few years, the Government of Sénégal resumed negotiations with the IMF and the World Bank and undertook a certain number of stabilization measures, with the peculiarity that the exchange rate could not be one of the policy instruments because of an extra-national agreement. Nevertheless, the deficit in the balance of payments was reduced, fiscal deficits began to be tackled and inflation was brought under control. A New Economic Policy with sectoral components in agriculture and industry was launched, aimed at redressing the fundamental distortions which impeded the development of the different sectors of the economy.

12. The New Agricultural Policy had the following objectives:

- ◆ the liberalization of agricultural input and output prices to set the right incentives for production;
- ◆ the gradual withdrawal of direct state controls on agricultural activities;

- ◆ the attainment of 80% self-sufficiency in food production by the year 2000.

It is widely considered that many key elements of this announced agricultural strategy were not implemented<sup>3</sup>. In particular real producer prices were not raised to incentive levels: the price of rice<sup>4</sup> was not raised, and rice remained more attractive to consumers than millet or maize, and the politically controlled groundnut price remained more remunerative than local cereals.

13. The New Industrial Policy aimed at stimulating cost-reducing responses by removing the overprotection and by shrinking the public enterprise sector and improving its efficiency. Tariffs were lowered, quantity restrictions were ended, price controls were by and large lifted, a new investment code was adopted and administrative procedures for investment were simplified (guichet unique), the export subsidy scheme was revised. However, by late 1989, the industrial sector was giving clear signs of not responding to the new environment. Institutional measures to support the new strategy were not forthcoming (notably in regard to reform of the Labour Code). The privatization of public enterprises was proceeding exceedingly slowly. In this precarious situation, a positive response by the industrial sector was further hobbled by high factor costs, notably for energy and labour.<sup>5</sup> Effective lobbying by the employers' associations and concerns of public officials over the increase in unemployment from plant closures led to a rescinding of the trade liberalization (by way of "mercuriales"<sup>6</sup>) and the consequent result that, at least in some subsectors, effective tariffs were only marginally lower than before the reforms began.<sup>7</sup> However, many industrial enterprises never recovered from the liberalization shock on their financial balance sheet, no longer had recourse to easy credit and were either closed or on the brink of bankruptcy. In mid-1992, the situation is basically the same and the perspective on industrial growth is extremely pessimistic.

14. The economic contraction increased the inability of the labour market to absorb new entrants as well as those workers who had lost their position either in the public sector or in industry. To respond to this situation, the government of Sénégal with the assistance of a number of international agencies is now promoting self-employment, often referred to as entrepreneurship<sup>8</sup>, in particular in the informal sector. While in the current circumstances such a concern is understandable, it certainly does not constitute a development strategy but rather the admission that all previous schemes have failed and new ones are not forthcoming. This policy has inherent limitations. For one, the informal sector does not have an infinite absorption capacity and its health depends in some way on the levels of activity in the modern sector. This

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<sup>3</sup> See: "Adjustment Postponed: Economic Policy Reform in Senegal in the 1980's", Eliot Berg Associates, Report to USAID/Dakar, October 1990.

<sup>4</sup> Sénégal only produces a small fraction of rice for its own consumption at a cost substantially higher than the world price. However, social concerns have led the authorities to control the price of rice which acts as a disincentive to domestic rice producers while encouraging the increased consumption.

<sup>5</sup> It has been estimated recently that in some subsectors, at equal productivity, the cost of Senegalese labour is four to six times the cost of Thai labour. (See the documents of the Symposium National sur l'Emploi, Commissariat Général à l'Emploi, July 1991).

<sup>6</sup> "Mercuriales" are reference prices on which the import duty is being calculated instead of the prices stated on receipts and bills of lading. This method of calculating tariff was initially intended to fight alleged dumping but its extension to a wide range of products suggests a covert way to reinstate a higher level of protection without adjusting the import duty rates set at the time of the liberalization.

<sup>7</sup> E. Berg Associates, *ibid.*

<sup>8</sup> While self-employment may lead to entrepreneurship, the two concepts should not be confused and their linkage is uncertain. If for nothing else, self-employment refers to a particular employment status whereas entrepreneurship refers to a particular set of qualities and an attitude toward risk.

policy also gives short shrift to the fact that imports of food, oil and other inputs are essential to economic and social life in Sénégal and that the country has had and most probably will continue to have serious balance of payments problems. It is highly unlikely that in the medium term this major constraint on the country can be relieved by an expansion of self-employment and/or of informal sector activities.

### Industry

15. The poor quality of industrial data in Sénégal makes it difficult to make an exact diagnosis of the situation. Some differences in available information may be due to unexplained differences in definition of what constitutes industrial activities. Timeliness of information is impeded by the lack of regular surveys and methodological problems in the design of surveys and the treatment of data<sup>9</sup> make the resulting information necessarily suspect. Instead of a diagnosis based on quantitative information, one can only rely on an impressionistic picture of the situation corroborated as much as possible by statistical data.

16. There seem to be a general agreement amongst experts in international organizations that the total employment in food processing, textiles, chemicals, metal working and other similar activities which constitute the private modern industrial sector does not exceed 30,000 on payroll at this time, an obviously tiny percentage of the active population.

17. There seems to be no doubt that the modern industrial sector has difficulties. Although hard data is unavailable, anecdotal information suggests that large segments of the sector is functioning at capacity rates below 50%, notably in textiles and groundnut processing. In addition some companies have recently gone out or appear to be on the point of going out of business while perspectives for growth are completely absent in other activities.

18. The industrial sector in Sénégal has two main components: the processing of traditional commodities for exports toward Europe and the production of goods for local consumption based on imported inputs. The agro-industrial sub-sector includes both aspects. It contributed 54% of total industrial value added in the second half of the eighties and 16% of the value of total exports in 1987 although this share is thought to be decreasing. Two-thirds of its capital was foreign-owned. Its activities can be classified in three distinct areas:

- ◆ Exploitation of natural resources either for exports (fisheries, salt, groundnut) or for local consumption (sugar, tomato concentrate, mineral water);
- ◆ Transformation of imported inputs for local consumption (flour, milk, vinegar, tobacco...);
- ◆ Final consumption products (cookies, candy...).

19. The textile industry was the second largest industrial sub-sector and used to be the third in importance in the region after Côte d'Ivoire and Cameroon. It contributed 13% of industrial value added in 1987. Its activities range from the production of cotton fibre, weaving (tissage), manutention and bonneterie. To allow its development, this sector benefitted from fiscal subsidies (notably on cotton fibre and dyes) and from a very elaborate system of protection. Nevertheless, it suffered from very stiff competition from European and Asian imports. The weaknesses of the sector included antiquated productive capital, low productivity of the labour force and the high cost of energy. With these inherent disadvantages, the sector was hit particularly hard by the

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<sup>9</sup> See for example the following reports of UNDTCD project SEN/87/010: (a) "Étude Préliminaire des Statistiques CUCI pour les Projections de l'Emploi Moderne", Report #51, October 1990; (b) "Méthode d'Analyse Prévisionnelle de l'Emploi à partir des Statistiques CUCI: Première Approche" Report # 85, March 1992.



liberalization of international trade in 1986 and several firms are said to have closed while the remaining ones are in a very weak financial situation.

20. In 1987, the chemical sub-sector contributed 38% of industrial value added and was made up of 40 enterprises mostly of small size. It produced fertilizers, soaps, cosmetics and pharmaceuticals, cleaning products, batteries, plastic products, paints and varnishes etc. for local consumption. The age of its equipment was extremely varied, being modern in fertilizers and pharmaceuticals and antiquated in soap-making and cleaning products while in the transformation of plastic products a great variety of equipment exists. This industry has also been severely affected by the competition from imports since 1986.

21. The metal-working industry was made up of some 44 enterprises mostly of small size. Its production consisted in non-durable consumption goods (enamelled pots and pans, aluminum products), durable consumption goods (bicycles and mopeds) and intermediary goods (cans, barrels, metal roofing materials, and reinforcing iron rods for concrete construction). There are also five small enterprises in general mechanical works and metallic construction and one enterprise for marine maintenance and repair (Dakar Marine, 96% publicly owned and currently in the process of privatization). The crisis which affects the country has had an impact on the demand for the goods and services provided by this sector while the marine repair activities have never been really financially self-sustaining.

#### The Labour Force

22. Although the employment survey of April-May 1991 was limited to the region of Dakar<sup>10</sup>, the information on the labour force resulting from it is directly relevant to the purpose of this report since a large percentage of the industrial base of Sénégal is concentrated in that region and relies on its manpower. In Spring 1992, 24.4% of the active population of Dakar was unemployed. A breakdown of the unemployed population into new entrants to the labour force and experienced workers reveal no substantial differences between the two groups: individuals out of a job (49.7%) are only slightly less numerous than new job seekers (50.3%). These figures indicate not only the extent of the economic recession in Sénégal at the time but also the major challenge of absorption of a growing young population.

23. Almost half of the Dakar labour force (45.2%) was classified as having no education<sup>11</sup>, while 29.3% had completed primary school, 21.6% secondary school, 2.7% general superior studies, and 1.2% technical superior studies. These rates are substantially lower among women than among men.

24. The relation between educational attainment and employment status is particularly revealing if one considers the ratio of the relative share of educational groups with their share in the ranks of the unemployed.

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<sup>10</sup> See "Enquête Emploi, Sous-Emploi, Chômage en Milieu Urbain: Avril-Mai 1991", DPS/MEFP and Commissariat Général à l'Emploi, Projet PNUD/BIT SEN/87/013, Novembre 1991.

<sup>11</sup> Although impossible to clarify from the information given in the survey document, this category is thought to include all individuals who have never attended school as well as those who attended a fraction of primary school.

**Table 2**

<b>Educational Levels</b>	<b>Total Unemployed</b>	<b>Experienced</b>	<b>New entrants</b>
None	0.684	0.873	0.489
Primary	1.191	1.092	1.293
Secondary	1.449	1.194	1.708
General higher	0.500	0.580	0.417
Technical higher	0.684	0.873	0.489

A ratio greater than one indicates a higher share of the group among the unemployed than in the population at large and therefore is a sort of proxy variable of the relative probability of unemployment for that particular group.

25. From the above table, it is clear that primary education provides no advantage in securing a position after the cycle of studies compared to no education. The gap is even more pronounced as regards secondary school students. For these categories, the higher value for new entrants to the labour force than for experienced workers is an indication of an increasingly tight labour market. The fact that unschooled workers appear to have an edge over their experienced equivalents suggest that employers may be willing to cut costs by hiring inexperienced young workers who may have lower wage demands based on their qualification and fewer family support requirements.

26. The data for higher education has to be considered with great caution. While it may reflect a significant demand for higher skill levels, it also reflects a certain scarcity of highly trained workers. However the low number of individuals in these categories also heightens the impact of slight changes between categories and the resulting figures may be somewhat distorted.

27. A relatively recent study of the informal sector<sup>12</sup> clearly indicates the challenge in transforming this sector into a seedbed for future modern industrial activity. While the vast majority of informal businessmen were between the ages of 25 and 44, only one third of them had a minimum of fluency in the official language, French, and 22% were wholly illiterate. Among those who could read and write, 60% had been schooled in Koranic schools instead of public schools.

<sup>12</sup> "Étude du Secteur Informel de Dakar et de ses Environs: Phase III", Charbel Zarour, USAID/Dakar, August 1989.

## **2. THE WORKING ENVIRONMENT OF INDUSTRIAL ENTERPRISES**

### **Government**

28. Over the last few years the government of Sénégal has been in an almost constant administrative, functional and spatial reorganization. These constant shifts in the structure of public administration are a symptom of the difficulties that the government is encountering in trying to come to grips with the challenge of managing a deteriorating social and economic situation. But the shifting of some functions from one ministry to another also reflects the temporary political ascendancy of some minister and its consequent ability to "raid" the functions of another one. Losers in such situations are not likely to collaborate with winners and interviews with either one of them yield widely contrasting points of view.

29. The acute financial problems faced by the government of Sénégal has contributed to increasing the power of a ministry which already was the "*primus inter pares*", the Ministère de L'Économie, des Finances et du Plan (MEFP). At the end of the 1980s, the Ministère du Plan first passed under the aegis of what was then the Ministère de l'Économie et des Finances (MEF) under the responsibility of its own minister without portfolio, before becoming simply another department within the MEFP. Obviously, its prerogatives and powers were substantially reduced, as was the ability to introduce a longer term view in economic management. Holding the purse strings of the state, the MEFP has seen its influence grow with the intensification of the fiscal crisis and wields enormous powers: delays in implementing policies are commonly attributed to the MEFP concerned with the cost impact.

30. The Ministry of Industry, Commerce and Artisanat (MICA) is extremely weak. Despite the much publicized New Industrial Policy, it is clear that this ministry has at this point no significant influence on economic decisions. Located in an infirm building way out of the centre of town, the Direction de l'Industrie (DI/MICA) deals with a sector which is in a severe crisis and does not appear as a pragmatic solution to the pressing employment problem the country faces. In addition, despite recent UNIDO assistance to establish its capability to implement a Strategic Management approach to Industrial Development and to improve the dialogue with industrialists, its relations with the private sector are only marginal. The Direction des Ressources Humaines (DRH/MICA) by and large appear mainly as an organ of transmission of offers for study tours and training seminars from international agencies. Despite its presence *ex officio* in the different commissions regarding HRD, its contribution to the debate appears only minimal.

31. The current status of MICA is not surprising. Its staff does not seem to have really grasped the intended new economic policy framework in its substance. In this mission and in previous ones, it has become increasingly obvious that once one can see through the liberal veneer of the discourse, the old controlling, centralist viewpoint is still present. This persistence of the old attitudes is not limited to MICA but is particularly harmful in an institution which is supposed to promote private industry. Initiatives in favour of "industrial"<sup>13</sup> investment promotion are not run on sound financial principles which should form the business calculations of investment agencies<sup>14</sup>. The Société du Domaine Industriel de Dakar (SODIDA), for example, promotes the creation of small enterprises on its grounds through an elaborate system of subsidies (on rental of space and of equipment) and special fiscal exemptions which were supposed to be limited in time but are in fact permanent: as a result either the firms created enjoy substantial profit situations or they are not viable outside this sheltered environment. In the same way, industrial HRD is not

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<sup>13</sup> Industry in many cases has to be understood in a very broad sense, and includes enterprises at the limit of what would normally be considered informality.

<sup>14</sup> The mission was told that the Fonds de Promotion Économique which guarantees bank credit to SME/SMI has been known to lead to an entrepreneur the minimum 10% of capital which is supposed to be provided from one's own funds. Not only would this practice, if it exists, normally lead a bank to reject a demand for credit for insufficiency of the personal contribution, but it also increase the risk to the PPE.

seen an investment for which the entrepreneur should bear the cost, but as dependent on grants, preferably from international agencies.

32. The Ministry of Labour recently absorbed the responsibilities of vocational training from the Ministry of Education and became the Ministry of Labour and Vocational Training (MTFP). This elevation of vocational training to the ministerial level results both from increased concerns about employment and the problems which graduates encounter in finding jobs and from an initiative of the World Bank, the Programme de Développement des Ressources Humaines (PDRH), which in its second phase will focus on education and vocational training after having identified a number of inadequacies in the current system. (see Chapter 3) The Office National de Formation Professionnelle (ONFP) is the agency under the aegis of the MTFP which deals most directly with vocational training. With a board of directors made up of representatives of employers' associations, unions and government officials, it is supposed to be autonomous. However, the extent of its autonomy may be questioned since its funding depends almost entirely on the public budget, and therefore the MEFP. At this time, its functions seem to be mostly that of an advisory bureau in matters of vocational training, mainly for the MTFP<sup>15</sup> but also apparently for other organizations. Beyond its functions of diagnosis, design of curricula, assistance in identification of funding sources for vocational training courses, it aims at having a more active role, first by coordinating international assistance in HRD and second by becoming the focal point for vocational training once the intended systemic reforms in this area are implemented. However, there are dissonant notes in the vision of the future role of the ONFP: while the ONFP explicitly describes its mission as a central information resource and a quality control agency for a very decentralized structure in matters of vocational training, there is an implicit, but never the less clear, underlying current of central control and management of the system.

33. The Ministry of National Education (MEN) was until recently responsible for all educational centres in the country, from pre-school to universities, including vocational training centres. In 1990, these responsibilities were somewhat curtailed by the shifting of the responsibility for vocational training to the MTFP. As could be expected, this loss was bitterly felt. While there may be some worth in the argument advanced by the Direction de l'Enseignement Secondaire Technique (DEST/MEN) that there is only a fine line between technical education and professional training, the reaction of that department to the problems encountered by holders of a technical baccalauréat in finding jobs<sup>16</sup> suggests that its ability to understand the requirements of the labour market may be limited. Although it was not possible to get an appointment with the Direction de la Planification in the MEN, one gets the distinct impression that the negotiations for the design of the PDRH2 were restricted to that department and that other departments of the MEN had only marginal inputs in the process.

34. Among other responsibilities, the Ministère de la Santé et de l'Action Sociale (MSAS) promotes the role of women as does the Ministère de la Femme, de l'Enfant et de la Famille. As such, they supervise a number of centres for women. These centres tend to provide training in very traditional female occupations (sewing is a standard course) and very often do not seem to go beyond the basics of household management.

35. The Commissariat Général à l'Emploi (CGE) is responsible to the Prime Minister and results from the reorganization of the Direction à l'Insertion, la Réinsertion et l'Emploi (DIRE). Like its predecessor, its mandate is to promote job creation for new entrants to the labour market

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<sup>15</sup> The ONFP was reported to have participated actively in diagnostic studies for the design of the PDRH2.

<sup>16</sup> Graduates from classes F1 (mechanical technician) and F2 (electrical technician) were found to have only limited success in finding jobs. The curriculum of these classes shifted away from practical training toward more theoretical education to allow them to enter university level education. Not only this dilutes the specific character of the technical education, but one may also wonder if these graduates would be able to follow effectively university courses generally designed for graduates from classes C (mathematics and physics). See also Chapter 3.

and for workers who have lost their position as a result of the structural adjustment. Although its staff participate in the different commissions concerning HRD, its preoccupations are of a much more short term nature.

### Industry Organizations

36. The Conseil National du Patronat (CNP) constitutes a kind of apex private sector organization, where all trade associations and their members are represented. Despite its name, it also includes representation from some state-owned enterprises such as the SONACOS (groundnut processing), the SENELEC (electrical power) and the different phosphate extracting and processing companies. Another association, the Syndicat Professionnel des Industries du Sénégal (SPIDS), was started as an association for small and medium industries but has grown in importance and now also includes representation from large companies including some of the parastatals. There exists also a Conseil National des Employeurs Sénégalais (CNES) as well as several others which represent small enterprises and artisans. The Chambre du Commerce, de l'Industrie et de l'Agriculture is not thought to represent effectively the private sector because it is not fully autonomous and its head is nominated by the government.

37. The existence of a variety of private sector organizations may be an effective means to promote a diversity of points of view. But in the case of Sénégal, the respective differences in opinions and even more so the respective scopes of these organizations are far from clear. The simultaneous participation of a number of companies in the activities of several associations may be the result of a strategy to maximize information gathering and possibly lobbying. One thing is nevertheless clear: despite the vacuum in industrial policy-making on the part of the government at this time, the private sector organizations appear to be mainly instruments of reaction, for example against a new fiscal rule, rather than organs for articulating and proposing a new policy framework. Even the regular meetings between representatives from these associations and either the President or the Prime Minister seem to concentrate on narrow points of tariffs and taxes. It may very well be that the tight financial situation of a number of industrial enterprises precludes over-burdened industrialists from taking on the unusual task of formulating policy proposals but in the current circumstances they are likely to become the immediate casualties of the lack of a workable policy framework.

38. Representatives of private sector associations recognize the necessity for investing in industrial HRD to increase productivity and competitiveness but stated that many industrialists are still far from sharing the same point of view; an attitude reinforced by the current gloomy perspectives for industry and the tightness of their financial situation. In addition, it was stated that many entrepreneurs were not even aware of needs and unable to diagnose the industrial HRD needs of their company. But their opinion on the supply side of industrial HRD were particularly scornful. The domestic industrial HRD system, mostly public, is considered completely unresponsive to the needs of industry, as much in the type of training provided as in its quality. Particularly severe criticisms were placed on the activities of international agencies in this area which were described as wrong-headed and self-serving. A large amount of training is offered by these agencies free of charge which downgrades its value. Individuals selected for study tours and training abroad by the firms are not necessarily the most appropriate but those who can use their connections to benefit from a trip and associated per diem expenses: employees particularly useful to a company tend to remain because their position is essential to operations. The quality of the training provided by these means is not thought to enhance one's ability to be promoted. Also, very few international agencies are thought to have coherent industrial HRD programmes based on a diagnosis of the actual needs of the industrial sector or of particular subsector: the offers of training grants are considered to be made without relation to specific local circumstances but on the basis of general ideas of what the needs are in the countries where an agency is active.

39. Finally, a number of in-country activities take the form of two to three day seminars or "journées de discussion" which remain at levels of generalization on the topic. The translation of whatever was learned during these seminars to practical application is often difficult.

Consequently the impact of these initiatives is limited and a certain lassitude toward these activities is becoming increasingly evident.

### Unions

40. There are two main unions, the Confédération Nationale des Travailleurs du Sénégal (CNTS) and the Union des Travailleurs Libres du Sénégal (UTLS). The unions are well represented in some industrial sub-sectors and public administration. They have been a major element of resistance in the attempts to reduce public administration employment and in the intended reform of the Labour Code. They share a common tradition with the French union movement and are overtly political, with some of their leaders being in positions of prominence in political parties.

### Advisory Services

41. A number of international consulting firms (such as Arthur Andersen) have associate offices in Dakar. But their competencies, generally limited to accounting practices, audit and general management consulting, may not answer all the needs of the industrial sector. The Société Nationale d'Études et de Promotion Industrielle (SONEPI) was set up in the early seventies with public funds and benefitted from UNIDO assistance: its mission was to prepare feasibility studies for small and medium industrial projects and also to provide financial guarantees. It is currently undergoing a partial privatization and will restrict its activities to feasibility studies and management support to small and medium enterprises.

42. The mission has heard on several occasions that a number of consulting firms have appeared on the market recently, maybe as a consequence of the general tight conditions of the labour market which push individuals toward self-employment. Many of these appear to be *ad hoc* undertakings and the quality of the services they provide may be very uneven.

### Finances

43. The disastrous balance sheets of a number of banks, of which a number were either fully or partially state-owned, led to their closure a few years ago. Lending based on political connections was eliminated and general sound banking practices were imposed. The capital of remaining banks was strengthened by injection of foreign investment. Foreign exchange can be purchased freely. Despite the often-repeated claims of shortages of credit, several sources indicated that banks may have excess liquidity and that the low lending activity may be a reflection both of the low investment demand and the scarcity of financially sound projects.

44. As regards encouragement for foreign investment, the situation is gloomy. The Investment Code was revised in the mid-eighties and procedures were simplified but subregional considerations may act as a disincentive. Sénégal is active in promoting subregional integration<sup>17</sup> and is a member of both the Communauté Économique de l'Afrique de l'Ouest (CEAO) and of the Economic Community of West African States (ECOWAS). As such it is trying to promote subregional trade. However, the trade liberalization scheme of ECOWAS imposes strict conditions of majority African-owned capital for companies benefitting from the incentives. This requirement may act as a *de facto* disincentive for industrial investment in the country.

45. The mission was informed that the banking system is not much trusted by the general public and does not attract savings. Its procedures, such as for money transfer, are said to be very inefficient. The long queues at all counters in the bank used by the mission lend support to this view.

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<sup>17</sup> Recently, a new ministry for African Economic Integration was created.

**Suppliers and Customers**

46. Since 1986, industrial enterprises can negotiate freely with foreign and domestic suppliers and customers as import licenses and other restrictions have been lifted. Purchase of foreign exchange is unrestricted and the local currency has a fixed rate of exchange with the French franc, giving it welcome (although controversial) stability.

### 3. INDUSTRIAL MANPOWER DEVELOPMENT IN SÉNÉGAL

#### Introduction

47. With a gross primary school enrolment ratio of 56.4% (1988/89) and adult literacy at 38% (1990) the education system in Sénégal by no means meets the basic needs of the people of the country. At the higher end of the system a grossly excessive number of students is enrolled in the general faculties of Dakar University, which consequently absorbs an equally excessive proportion of the national education budget. These striking features of an unsatisfactory situation are well documented and understood, and a reform programme awaits implementation.

48. One of the effects on industrial manpower is a high level of illiteracy amongst industrial employees. It is further stated, although not with unanimity, that technical education is not geared to industrial employment requirements. Similar views are expressed regarding institutional vocational training. These questions are explored further in this chapter, but it must always be remembered how small the industrial sector is and how small its needs are for new employees, especially in the precarious conditions which have prevailed in the sector for the last five years or so.

#### The Education System

49. The structure of the education system in 1988/89 is shown in figure 1. This is the most recent officially published and has not been substantially changed as regards general education. Vocational training, shown on the chart, was however removed from the care of the Ministry of National Education in 1991 and placed under the Ministry of Labour and Vocational Training.

50. In the academic year 1988/89, 658,000 pupils were enrolled in primary schools, representing 56.4% of the population aged 7-12. In urban areas the gross enrolment ratio was 93.2%, but in rural areas only 34.4%. Some 41% of the total number enrolled were girls. 9% of primary pupils attended private schools<sup>18</sup>. The average annual increase in the number enrolled between 1982/83 and 1988/89 was 4.8%. Those who complete primary schooling successfully are awarded a "Certificate of Elementary Primary Studies" (CEPE).

51. In the same year middle schools had 123,000 pupils. Entry is subject to competition. The proportion of girls is now lower than in primary schools, 33.9%, and the proportion at private schools substantially higher at 28.4%. Total enrolments have been growing at an average rate of 6% during the period 1982/83 to 1988/89. As can be seen in figure 1 pupils may change after one year at a general school to practical schools for a three year course leading to the "Certificate of Vocational Aptitude" (CAP); in the year 1988/89 298 pupils were in this stream in public institutions, the figure in private centres not being available. Those who complete the general education courses successfully are awarded a "Certificate of Completion of Intermediate Studies" (BFEM).

52. When it comes to secondary schools the numbers take a sharp fall. Again in 1988/89 there were 33,359 students in 49 general education schools and 4,769 in 16 technical schools. In both cases just over 30% of the students were girls. ("Technical" in this case includes "commercial".) Around 18% of the total attended private schools (a lower proportion than at private middle schools). Those who achieve their baccalauréat (4,660 in 1989) have the right to enter the university without further competition or examination, although there are limits and prerequisites for certain subjects. There are advantages in university enrolment, although enhanced job opportunities upon graduation in non-technical subjects are not among them, and it is this automatic right of "bacheliers" to enrol which has permitted the inflation of student numbers. In the case of holders of the technical baccalauréat, the mission understands that this is not

<sup>18</sup>The term "private" comprises all non-governmental schools including those run by charities, missions and other NGOs.



considered a useful qualification by potential employers, being neither adequately practical nor at a sufficiently advanced theoretical level, so that holders consider it absolutely necessary to continue to university. This is an area where reform has been initiated. (see also paras.64, 66-64, 66)

53. The teaching staff employed by the Ministry of National Education numbered 16,130 in 1989/90. Of these 11,395 were in primary, 2,657 in middle and 2,078 in secondary schools. The rates of "feminisation", to use the ministry's word, were: primary 26.5%, middle 15.3% and secondary 12.7%. As reported to the UNDP (see Chapter 4) over 500 teachers were provided under French aid and 33 under Belgian aid in 1990. A good number of the French teachers are thought to be "co-opérants" who undertake this work for two years as an alternative to compulsory military service.

54. The principal university in Sénégal is the Cheikh Anta Diop University of Dakar. A second university has recently opened at Saint-Louis, in premises built for the purpose some twenty years ago. The universities are complemented by six University Institutes and six other higher education establishments. In addition the École Polytechnique at Thiès, which was for many years under the control of the Ministry of the Armed Forces, became part of the University of Dakar in June 1992. In the year 1988/89 the University of Dakar had 13,568 students, of which 91% were Senegalese, and 2,960 were in the Science and Technology faculty. Saint-Louis had not yet opened.

55. The six University Institutes and their respective Senegalese enrolments were as follows:

École Nationale Supérieure Universitaire de Technologie (ENSUT)	182
École Normale Supérieure (ENS) (Teacher training)	307
École des Bibliothécaires, Archivistes et Documentalistes (EBAD)	45
Centre d'Études Supérieures de Techniques d'Information (CESTI)	15
École inter-état de Sciences et Médecine Vétérinaires (EISMV)	83
Institut de Français pour Étudiants étrangers (IFE)	45

56. The other six higher education establishments and their Senegalese enrolments were:

Centre de Formation et Perfectionnement Administratif (CFPA)	68
École Nationale d'Éducateurs et Assistants Sociaux (ENEAS)	86
École Nationale d'Administration et de Magistrature (ENAM)	69
École Nationale des Cadres Ruraux (ENCR)	45
École Nationale d'Économie Appliquée (ENEA)	67
Institut National du Développement Rural (INDR)*	32

\* The name and perhaps function of this institute has been changed. It is mentioned in the 1990 Development Cooperation Report (UNDP) as receiving a French loan of \$2,901,000 over the period 1980-91.

57. The university came in for severe and vivid criticism in a report commissioned by the French Ministry of Cooperation and the World Bank and issued in September 1990 as part of a series of studies on higher education in Sénégal<sup>19</sup>. It first points out that the university absorbs 21.6% of the national education budget, with real growth between 1987 and 1989 at +13.5%, compared with -1.4% for the primary education budget in the same period. There were 16,744 students. Total employment in the modern sector amounted to 2,000 at senior levels and 3,500 at middle management and higher technician levels - and replacement demand would require some 150 new recruits. (This does not apparently include the requirements of the government or of the

<sup>19</sup> 'Rapport sur l'enseignement supérieur au Sénégal'. Plus de diplômés, des diplômés plus adaptés, moins d'étudiants, des coûts de fonctionnement stabilisés. Rapport cofinancé par le Ministère français de la Coopération et la Banque Mondiale dans le cadre d'une expertise à frais partagés. Septembre 1990.

education service.) Nearly three-quarters of the students are in the first cycle (a two-year period of study), which it is apparently possible to repeat up to five times, although there are moves to reduce this facility.

### Management Education and Training

58. The highest level management training institution in Sénégal is the Centre Africain d'Études Supérieures en Gestion (CESAG), sponsored by the seven member states of the CESAG. CESAG's flagship programme is the two-year Higher Diploma in Business Management, equivalent to an American MBA. There is also a fourteen-month programme in International Audit and Control and an eighteen-month programme in Health Service Management. The health management course is complemented by seven specialised seminars lasting two or three weeks. CESAG also offers lower-level general management training courses, one of fourteen weeks and the other of 32 weeks. The courses include human resource management as one subject, although this seems to take a fairly restricted view of its scope. (Personnel management and industrial relations). CESAG, it should also be noted, has a Département Femmes responsible for inputs on the employment of women, but not running courses specially for women participants. CESAG arranges short seminars on request but has no published or regular programme for the local market. It is also retained for research and consultancy assignments (notably in 1990/91 by the ONFP and the World Bank for a study on employment and training, mentioned below).

59. CESAG has fine premises, highly qualified international staff, and advanced facilities (including linkage enabling interactive sessions to be led by lecturers in Canada). However it is suffering an acute financial crisis brought about through lack of basic funding by the sponsoring states and by the small market for its long high-fee courses even though they are open to participants from any francophone country. As a high-level international institution it may not be a suitable locus for entry-level or middle management training for Senegalese industry.

60. The Association de Formation au Sénégal (AFORS) offers a menu of 23 short courses varying from 8 hours to 140 hours in duration, some full time and others on one half-day a week. Most of them are intended for senior and middle managers, but others for supervisors and a few for "employés et ouvriers". Subjects, with duration in hours, include: ABC of Financial Management (32), Communication in the Enterprise (16), Quality Circles (16), How to run a Meeting (24), Health and Safety (12), PERT (32), Training Management (24), Management of Human Resources (8), etc. The 140-hour course, run over 35 weeks spread over two years, is for "Techniciens d'Animation", i.e. supervisors. The first year is devoted to human relations (personality, participative management, leadership, and the art of instruction<sup>20</sup>); the second year deals with the organization of work (enterprise structure, production or service organization, simplification of work, health and safety, and management). AFORS also organises and runs tailor-made courses and seminars, and has been engaged to do so by the ONFP on one or two occasions. It has also been running literacy courses for employees of members companies.

61. The Association was founded in 1958 and turned to Senegalese hands in 1974. It received regular French aid until 1984, but now has only occasional fellowships for updating teaching staff. Its membership consists of some 40 enterprises including big state-owned ones such as SENELEC. Annual subscriptions are paid in advance but can then be set against training fees. Some 60 non-member enterprises also send participants to courses. The association aims to balance its books annually but not to make a profit. Owing to the present economic situation it is in some difficulty, but not in crisis.

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<sup>20</sup> The original French for the last two of these is: "Fonction animateur (bon chef)" and "L'art d'instruire". The objective of the latter is to make participants capable of teaching a task ("une tâche") by the "méthode T.W.I.", presumably the Training Within Industry familiar to British trainers.

62. The permanent teaching staff numbers only four. Other trainers are brought in from member companies (and if necessary given a short course in training techniques). External trainers are also hired from time to time.

63. The Chamber of Commerce has a training centre understood to run fairly low level courses in such subjects as accounting, computer operation and commercial procedures, but not apparently anything at a management level.

#### Engineer and Technician Education and Training

64. This kind of education is rooted in the education system. Even though some technician-level training now takes place outside the Ministry of Education's system, the length and style of programmes and the certification system are still educational in style. It is notable that the majority of all subjects offered are in traditional subject areas and do not reflect latest technologies, neither in terms of course content nor in teaching approach.

65. A series of technical baccalauréats are in surprisingly specialised and "vocational" fields considering that they are school subjects and intended to lead to university entrance. Despite their titles they may in fact require substantial theoretical grounding. Two of the fields have in fact had their theoretical components reinforced in order to encourage university entrance and to facilitate study at university level. This is one part of a reform of the technical baccalauréat system. Another part of this reform was to convert three fields of study from baccalauréat courses to "Brevet de Technicien Supérieur" courses. These have a higher practical content, and principally intended to produce immediately employable technicians. Holders of the BTS may compete for entry to ENSUT but are not qualified for the university itself. The three subjects in this group are: mécanique automobile, chaudronnerie et tuyauterie industrielle (boiler-making and industrial pipefitting), and construction métallique. It is not necessary to attend a Ministry of Education lycée technique to study for a technical baccalauréat. This is also the exit standard of the Centre de Formation Professionnelle et Technique Sénégal-Japon and there may be other institutions. A lower-level certificate, the "Brevet de Technicien", may be obtained after three years' appropriate vocational training.

66. Engineers follow courses in the Science and Technology faculty of the university or at ENSUT, the University School of Technology. It is understood that there is an adequate job market for graduates.

#### Vocational Training

67. The vocational training system in Sénégal is rather complex and appears to involve 14 ministries, a number of private-enterprise training organizations and non-profit NGOs. The ONFP has published directory of VT organizations<sup>21</sup>. It gives details of the 59 institutions which replied to the questionnaire and lists a further 56 "non repertoriées", which from their names seem to be in all sectors, not only secondary. From the point of view of industry three of the most interesting listings are those of the in-company training centres operated by SENELEC, the state electricity company, Dakar-Marine, a parastatal shipyard, and by the phosphate company CSPT. These alone make considerable inroads into the total requirement of modern-sector industry.

68. Some twenty of the other fully described institutions offer skill training possibly relevant to industry, including not only mechanical, electrical and similar skills, but also accounting, computer operation, electronics and such courses, and dressmaking. Eight of these twenty are private, i.e. non-governmental in one way or another, (including three Don Bosco schools) and one is parastatal (the Centre National de Qualification Professionnelle). Two of the public institutions are in fact technical lycées. Four are regional VT centres operated by the MTFP; there is very

<sup>21</sup> Repertoire des Structures de Formation Professionnelle au Sénégal, ONFP, Avril 1990

little by way of industrial employment in the regions where these centres are located. A group of VT institutions was transferred from the Ministry of National Education to the Ministry of Labour and VT in 1991.

#### Centre National de Qualification Professionnelle

69. The CNQP is an interesting training centre which provides a possible model for state/employer collaboration as well as an example of the need for change and renewal. The board of the centre is tripartite, the government being represented by the MTFP. It is apparently ineffective in setting policy or in fund-raising, but the opening is there for industry participation.

70. The centre offers (1) basic three-year pre-employment programmes leading to the centre's own certificate; (2) further training for employed workers and technicians (limited by the age of centre equipment); and (3) special programmes on demand. The state pays a fixed financial contribution which does not even cover staff salaries; all other income has to be earned and comprises fees paid by foreign participants in the basic programmes and by or on behalf of all participants in other programmes.

71. The basic programmes are in general mechanics, automobile mechanics, electricity, metalwork, hydraulics, woodwork and "informatique", with third-year modules in electronics and industrial refrigeration. The first year's training is all at the centre, but the second and third years consist of alternating six-week periods at the centre and with enterprises. These placements have become difficult to arrange. The centre can accept 72 entrants a year, and received 825 candidatures last year. Four or five a year are dismissed but there are no dropouts.

72. Amongst the special programmes have been a number for the "informal sector" sponsored by donors, not always in main-line subjects, e.g. a course for butchers was sponsored by the German Friedrich-Ebert-Stiftung.

73. Follow-up of the basic-programme students is weak and their fate in terms of employment or self-employment is not adequately known. According to the Zarour report mentioned earlier some employment difficulties are experienced. The centre does receive informal, unsystematic information from employers indicating demand trends and there is known scope for expansion in certain fields, e.g. maintenance of office equipment and air-conditioners.

74. The centre was supported by UNDP/ILO in its early days but now (by its own account) needs re-equipment and instructor training. A project proposal has been submitted to donors. However the CNQP is on the ministry list for PDRH assistance and this is likely to delay the renewal programme. Meanwhile the French provide a number of instructors, whose view, so the mission has been indirectly given to understand, is that the centre quite urgently needs renovation and revitalisation.

#### Report on Thirteen Training Centres

75. An extremely thorough report on the training needs of the informal sector by the late Charbel Zarour<sup>22</sup> gives a rich picture of the thirteen establishments from which enquiries were made. The report mostly comprises demand analysis based on responses from 396 entrepreneurs and 112 apprentices. Two of the institutions are operated or supervised by the Ministry of Industrial Development and Handicraft (now the MICA), two by the Ministry of Justice, four by the Ministry of Social Development, four by the Ministry of National Education (at the time) and one by the MTFP (once again the Centre national de Qualification professionnelle.) The Ministry of National Education shares supervision of one institution with the Ministry of Health; this trains hospital maintenance technicians and is thus not relevant either to the informal sector or to

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<sup>22</sup> Étude des besoins en formation du secteur informel. ONFP, Avril 1990.

industry. Those under the Ministry of Justice do not, as one might expect, train young delinquents, but "enfants déshérités en milieu urbain" aged from 2 to 21 in one case, and "jeunes enfants et jeunes femmes adultes" aged 11 to 25 in the other. (Enrolment respectively 1085 and 980, but the size of the other schools is very much smaller, and some are considerably under-utilised.) Entry levels and exit standards cover a wide range, from a simple institutional completion certificate to the technical baccalauréat. It is interesting to note that the institution offering this latter course, the Centre de Formation Professionnelle et Technique Sénégal-Japon, does not succeed in attracting a full complement of students. M. Zarour also notes a considerable range of quality in course design, teaching and equipment.

76. All these schools except the hospital technician school offer skills possibly employable in industry, or which might make a basis for self-employment, but hope rather than labour market information seems to be the general basis for course selection both by institutions and trainees. M. Zarour reports in every case but one, the higher-level Japan-supported school, that graduating students do not easily find employment.

#### "Appréciation du Système Formation-Emploi"

77. In a report entitled "Appréciation du Système Formation-Emploi par les Entreprises"<sup>23</sup> some unexpected conclusions are reached:

"The results of this study cast doubt on some commonly held notions:

Not only do enterprise managers consider in general that training is appropriate to employment and that the labour market supplies their personnel needs, but also local training centres are well thought of.

Market expectations are fairly optimistic in terms of production, investment and employment, even if some sectors under-utilise their productive capacity."

Regarding training, some enterprises think that it should be more practical, while others consider it their own responsibility to give specific job training to individuals who have had general training. Almost all consider that collaboration between training centres and enterprises should be improved and that training centre equipment should be compatible with that actually used by companies. Trainees should also have better training in leadership and in oral and written expression.

78. On the employment side the optimism is tempered by gloomy expectations in the chemical industry and in commerce; also by the refusal of parastatal enterprises to hire new employees, despite favourable expectations, by reason of "contract-plans" signed with the Senegalese government. In summary, "the problems of industry must be sought elsewhere than in an inappropriate relationship between the jobs thought necessary by decision makers and available training."

79. Another volume in this series, "Appréciation du Système Formation-Emploi par les Centres de Formation et les Syndicats", adds to these views. The principal conclusions include:

- ◆ Employers regard the practical level of trainees inadequate.
- ◆ Employers cooperate very little with practical "stages", especially when expected to pay the trainees. They would in fact expect to be given incentives, for example through fiscal means.

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<sup>23</sup> ONFP, Mai 1991. Part of a report on employment and training questions commissioned by the ONFP and the World Bank.

- ◆ Government or parastatal control in general constitutes a hindrance to the development of training institutions. It normally causes shortage of resources, heavy administrative and budgetary procedures, and slow decision-making.
- ◆ Teaching staff in public institutions are generally sufficient in number but have very little motivation.
- ◆ Training within an enterprise, when focused and directed to a specific job, is appreciated.
- ◆ Training centres often lack modern equipment which is not obsolete in relation to the reality of enterprises. There is a kind of technological slippage.
- ◆ Employers' organizations consider that technicians lack ability in analysis, synthesis and report-writing.

In summary, the report concludes, the poor match between training and employment results from stifling control, inadequate resources, technological backwardness, and weakness in the involvement of enterprises in training and in the definition of curricula.

#### Finance of Vocational Training

80. The government is in a steady state of financial crisis and cannot adequately fund any of its activities. Education and training suffer accordingly. A payroll tax raised from the formal sector and intended to be spent on training in fact goes into central funds. Employers are naturally disinclined to make other contributions to the cost of pre-employment training and in any case have little or no spare money for such purposes.

#### Conclusion Concerning Vocational Training

81. The country's VT provision certainly appears very extensive and highly varied and seems to meet the needs, or at least expectations, of industry. It is probably to some extent wasteful of scarce public resources, even though these are inadequate. While some modernisation of curricula might be desirable this should not go beyond market demand, and while coordination could be improved in certain respects, especially skill standard-setting and testing, there seems to be no imperative need for more centralised control. The state could also assist by improving labour market information and should allow and encourage employers to take a more active role. Capital investment is required - and may become available under PDRH2. Complementary teacher retraining would be entailed, and would help to raise morale.

#### Educational Reform

82. The inadequacy of the national education system was realised more than a decade ago. In 1981 a national conference called Les États Généraux (States General) was convened with representatives from all local communities. As an outcome a number of commissions were created to work out proposals and present them to the government. This process took four or five years. Some of the proposals, such as the abolition of private education, were rejected; others remain controversial, such as the question of primary education in vernacular languages. Up to now (1992) little has been put into practice. However, at least in the field of technical training changes have been made in technician training as mentioned above and vocational training has moved ministries. A "Loi d'Orientation" was passed in February 1991 but the activating decrees have not been drafted and promulgated. Neither the will nor the resources have been available for the tremendous, and no doubt very unsettling, effort needed to bring about the major reforms required. All attention and hopes are now fixed on PDRH2.

### HRD in the Industrial Policy Proposed by the MICA

83. A 24-page paper entitled "Politique industrielle" was issued by the Industry Directorate of the Ministry of Industry, Trade and Handicrafts in June 1992. The status of the paper is not clear, nor, it must be added, is the influence which the ministry has on central government policy or on the activities of industry itself. The mission has rightly or wrongly formed the impression that this influence is slight.

84. The paper pays little attention to the human-resource aspect of industry. Under one of the five strategic objectives, namely "Employment Creation", the policy of moderation in salary increases "should be continued and accompanied by training activities better targeted in relation to needs." Under the strategic approach the weakness of management is pointed out. "The structural and organizational weaknesses of the productive sectors in Sénégal may be summarised as follows:

- ◆ The levels of management and organization ... are weak and inadequate;
- ◆ Some enterprises have little interest in developing their management and organization, because their efforts have not been profitable, and other non-rational methods have been more effective;
- ◆ Enterprises have particular difficulty in improving and rationalising management in a turbulent and unstable environment which makes their efforts very onerous;
- ◆ Enterprises have to develop a great number of functions for themselves which cannot be bought in at acceptable cost or quality."

85. However, HRD (valorisation des ressources humaines) only reappears as one of a set of "complementary policies", and then only briefly. HRD is seen as "activities permitting the increase of qualifications in management, technology, organization etc ... Priority actions will be:

- a. Management training and reinforcement in:
  - ◆ Management techniques for entrepreneurs and middle management;
  - ◆ Further training of graduates and future graduates to meet the needs of the private sector;
  - ◆ Promotion of projects for future entrepreneurs (formal and informal sectors).
- b. The creation of a collaborative structure to coordinate and execute HRD activities decided upon by the various partners responsible for developing the private sector..."

86. While these activities are comparatively far-reaching, they do not constitute a comprehensive programme of HRD for industry and are not given anything like the prominence, or equality of importance with other major strategic inputs, which HRD merits. Furthermore, at least by implication, the activities are to be led by the Ministry rather than by industry. This seems to apply particularly to the "collaborative structure".

### A National Vocational Training Policy Proposed by the MTFP

87. The MTFP issued a document entitled "Politique Nationale de Formation Professionnelle" in June 1992. The missions understands that it has the status of a discussion paper. The Ministry of Education, to its annoyance, was not consulted. As will be seen below, the proposals will be articulated with PDRH2 in the first phase, called "transitional", from 1993 to 1997, but certain complementary programmes proposed for the same period will lie outside PDRH2. The Ministry's

interest extends beyond the training requirements of industry to those of other sectors and groups, and special attention is intended to be given to women, young people, the disabled and "producteurs de base"<sup>24</sup>.

88. The MTFP foresees a highly centralised, controlling and directing role for itself in this policy, even though part of the proposed system is intended to take an objective view of the requirements of the labour market, to which training will be adapted, and various good intentions as regards decentralisation are expressed. There is in fact an enormous gap between this dirigiste viewpoint and the World Bank's policy of minimising government participation or intervention in the training system. It is of course this latter policy which the Bank will press to be implemented through PDRH2 and the policy paper might represent the ministry's first attempt to challenge the Bank's position. Whatever its intention the paper is of high quality and shows a thorough understanding of the needs and components of a training system.

89. After discussing aims, objectives and directing principles the document sets out "a strategic approach based on some essential elements amongst which:

- i. Establishment of a frame of reference.
- ii. Creation of a VT observatory.
- iii. Restructuring and renovation of the training apparatus.
- iv. Reinforcement of VT planning.
- v. Vocational guidance and selection.
- vi. Training of trainers.
- vii. Adaptation of syllabuses and curricula.
- viii. Creation of a special fund for VT.
- ix. Development of inter-institutional relations."

90. It is under iv., vii. and ix. that despite references such as "indicative curricula" and "administrative and financial autonomy" an intention to retain central control can be sensed. Under ix., for example, the MTFP intends to exercise pedagogical control over training centres operated by other ministries and by public and private organizations. This control will comprise responsibility for the certification system and approval of qualification and participation in the definition of objectives, assessments, and basic skills required to improve the profitability and performance of public and private enterprises. While some coordination in these areas is admittedly necessary it certainly appears intended to be government-directed rather than user-directed.

91. This section goes on to propose consultative councils at the national and regional levels on which ministerial departments and interested partners will sit. They would give advice on studies and proposals especially those of the MTFP, and pronounce on priorities related to the demands of economic and social development.

92. At the level of training centres the board of governors (conseil d'administration) would include members of all social partners in the locality. "True and effective decentralisation will be that which give powers to the board of governors to direct and control all the activity of the establishment and to take all measures to improve its operation and efficiency". It has to be said that the mission does not see such decentralisation as inherent in the ministry's other proposals.

93. There is no apparent appreciation that a non-ministerial or even non-governmental council or authority might have a better chance of attracting the willing collaboration of employers' organizations, training organizations, trainees and all ministries and others concerned in the coordinating functions indispensable to a respected and equitable training system.

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<sup>24</sup> Also referred to in the paper as "producteurs à la base", defined as "peasants, fishermen, foresters, rural artisans (including apprentices), cattle farmers etc". If "la base" is defined as above it lies outside UNIDO's frame of reference, but it could presumably be extended to include micro-agro-industries (mango-drying for example) or even micro-woodworking or micro-metal-working "industrial" enterprises.



94. The Plan of Action includes three elements under PDRH2 (estimated to cost \$28 million) and seven complementary programmes. The PDRH2 elements are:

- i. Institutional reinforcement.
- ii. Renovation of training centres.
- iii. Functional literacy within enterprises.

95. "Institutional reinforcement" refers to three government units: the Directorate of Vocational Training, the ONFP, and the Academic and Vocational Guidance Centre in the Ministry of Education; and to a "regional coordination organization". These will take care of: planning and statistics; training/employment linkage (the "observatory"); pedagogical support to training centres (organization, curricula, methodology); training of trainers (87 to be retrained and 47 to have initial training); decentralisation; guidance and selection. Notably absent: any reinforcement of employers' or other user organizations.

96. Renovation of training centres refers only to MTFP centres. Eleven in Dakar are to be reorganised as a coherent group of seven, to be rebuilt and re-equipped accordingly. One further centre will be renovated at Saint-Louis. Four of the seven centres in Dakar will offer industrial training in the normal sense, however, the limited size of the industrial sector should be considered in this context. In addition, there are a number of private training centres and in-company training centres outside the direct control of the MTFP and these will not presumably benefit from PDRH2 funding. Considering this demand and supply situation and in absence of any other evidence, it is not clear whether the renovation of training centres corresponds to an actual needs assessment.

97. The functional literacy element of PDRH2 will target 10,000 workers in the hope that three-quarters of the them will reach the desired standard.

98. The seven complementary programmes to be associated with PDRH2 will cover:

- i. Retraining facilities;
- ii. Preparation for self-employment;
- iii. Organization of apprenticeship;
- iv. Training of "producteurs à la base";
- v. A plan for trainer training (covering 1700 trainers);
- vi. Training of training managers and specialists;
- vii. A programme of four studies.

99. After the end of PDRH2 (c. 1997-8) the Ministry proposes to pursue reform along the following medium and long-term perspectives:

- i. Definition of a new VT organization chart;
- ii. Numbers to be trained to be pyramidal (the higher the fewer);
- iii. A new conception of management and coordination of VT;
- iv. Information education and training;
- v. Reinforcement of financial resources for VT;
- vi. More effective training of trainers;
- vii. Organization of further training (formation continue), comprising: institutionalisation of training within enterprises, and institutionalisation of requalification facilities.

100. The first three of these are expanded in the policy document. The proposed organization chart is attached to this report as figure 2. The "pyramid" results from the intention to concentrate on lower-level skills, thus reversing the current practice and trend. 62% of a given number (perhaps 1,000) in training would be in Level 1, 20% in Level 2, 12% in Level 3 and 6% in Level 4. As regards management and coordination "all VT organizations, formal and informal, from the top to the base of the pyramid, would have to come under unified supervision and thus constitute a true system of VT." Furthermore "There is a close relationship between training, work and

**employment. Effective discussion mechanisms must be set up between the various ministerial departments responsible for their management on the one hand, and between these ministerial departments and the partners on the other hand."**

#### 4. INTERNATIONAL ASSISTANCE TO HRD IN SÉNÉGAL

##### General

101. The situation of international assistance to HRD, and particularly as it concerns industry, in Sénégal is rather confused. There is a general perception of existing needs but no systematic assessment of these needs, at least on a sectoral scale. As far as this mission could determine, the preparatory studies for the design of the PDRH2 constitute the first attempt at a serious diagnosis of the occupational training situation in the country. But meanwhile efforts from the international community and from individual agencies are scattered and seemingly determined in a large part by the latest trend without regard for the longer term implications for the country: these days, for example, assistance to the informal sector seems to be particularly popular.

102. The modern private industrial sector has learned to regard this situation with a certain amount of cynicism. The public sector, while decrying the lack of coordination, seems a lot less preoccupied by the situation and is adept at formulating its requests to satisfy the evolving parameters of industrial HRD assistance. As an example, all training seminars, notwithstanding their nature or content, are described as "training of trainers", thus instantly fulfilling the wishes of international assistance agents to promote an autonomous local capacity for further training. Although institutional strengthening has lost some currency, it has been replaced by capacity building which is often to be understood as assistance to public bodies which may or may not transfer efficiently know-how to end users.

103. To avoid any misunderstanding, a distinction must be made between what may be called extended industrial HRD and immediate industrial HRD. Extended industrial HRD includes both the "input" and "output" aspects referred to by Messrs. Manton and Hurley in the Sri Lanka report of this series of evaluations, while immediate industrial HRD includes only the input aspect. An extended industrial HRD programme aims at building the local capacity for an autonomous and permanent transfer of knowledge, i.e. people trained must be able to teach others the skills which they do not normally use at their level of qualification. Immediate industrial HRD aims simply at transferring knowledge and know-how to the individuals who will use it. One type of industrial HRD is not superior to the other but each fulfil different functions and has different requirements. Extended industrial HRD should have a multiplier aspect and a social impact while immediate industrial HRD has only an individual or institutional impact. Given the differences in impact, a coherent development strategy for a country should put the emphasis on extended industrial HRD.

##### UNDP Fifth Country Programme ("Programme-Cadre")

104. A joint UNIDO/ILO mission has recently been in Sénégal to draft a component of the UNDP fifth cycle programme on 'Employment and the Private Sector'. The present evaluation mission understands that the draft is under revision, and has seen only some parts of it, including a draft ILO proposal on vocational training (P. Martin, 2 June 1992).<sup>25</sup> This paper points out that PDRH2 will provide an excellent opportunity to redress an unsatisfactory system and that current weaknesses indicate specific lines of complementary action by UNDP.

105. The present training system is seen as offer-driven, too academic and essentially directed towards the modern wage economy. It is thus ill adapted to the national context and does not address the need of the most numerous and the most disadvantaged to acquire remunerative skills. Furthermore the system is concerned almost entirely with initial training; and it leaves apprenticeship (which is informal in Sénégal) to fend for itself. The paper also lists internal inefficiencies. It is to be noted that the analysis deals with vocational training in general, not only

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<sup>25</sup> The draft is understood to include background information and analysis which would usefully complement the information in this report.

the training for industry which interests UNIDO.

106. The paper then proposes a vocational component for the fifth cycle programme, divided into four elements. It must be emphasised that this is a draft proposal and the mission does not know what its fate will be. The four elements are entitled:

1. VT policy and its legal framework;
2. Training/employment links and coordination:
  - ◆ Employment and VT observatory;
  - ◆ Evaluation of vocational qualifications by sub-sector;
  - ◆ Improvement of the apprenticeship system;
3. Cooperation between the social partners (listed as the administration, the private sector and the direct beneficiaries);
4. Further training (formation continue).

107. UNIDO will have a contingent interest in a programme of this sort, to the extent that industry (i.e. employers and employees) will have great interest in its successful and economic operation. Here again support for employers' organizations or professional associations is not foreseen.

#### UNIDO's Contribution

108. UNIDO's formal counterpart is MICA, although all project proposals and fellowship and study tour candidatures have to be approved by MEFP. In practice relationships are fairly informal and the UNIDO office, as well as visiting officials and consultants, are free to have non-binding discussions as and when they wish. It is understood that the UNIDO office enjoys friendly and productive relations with UNDP and ILO.

109. UNIDO's portfolio of projects currently under execution, including regional projects, totalled US\$4.3 million as of March 1992. Projects currently being considered reached a total of US\$3.6 million while projects under formulation are currently estimated at US\$1.1 million (see Annex 1).

110. A review of UNIDO projects currently under execution in Sénégal indicates a certain amount of training in a great variety of projects but overall this training comes under the category of immediate industrial HRD. Most projects, whether they aim to train officials in the new industrial policy framework, or simply in the drying of fruits, seem to limit their training to the institution which they are assisting or to its immediate environment. The type of training foreseen in the documents also suggests a certain equation of industrial HRD with technical training without much consideration for the managerial aspects. For example, there does not seem to have been an attempt on the part of UNIDO to transfer the experiences in successful industrial restructuring and the management decisions to which firms were confronted which have occurred in other countries.<sup>26</sup>

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<sup>26</sup> A staff member from a private sector organization revealed having made such a request to UNDP, which responded by suggesting that it be done in the context of a South-South program under TCDC. There apparently was no follow-up from the organization because, as the mission was told, the experiences of successful restructuring in developing countries are quite rare and not very well known.

111. However, UNIDO has had some experience with projects which seem to embody a high content of industrial HRD. For example, in the early seventies, UNIDO participated in the creation of a foundry development centre at Thiès which aimed at organizing the transfer of new technology, establish new products, assist in the expansion of the existing foundry centre through research, training and demonstration etc. The foundry centre was to serve as a nucleus developing new techniques and disseminating them to other foundries with proper training. Unfortunately, this centre no longer exists.

112. One recently started project, at the SONEPI, appears to include elements of extended industrial HRD. With the objective to attend to the development of investment promotion system for SMI, the project intends to train individuals in techniques of feasibility and market studies, who will then assist and train others in relevant institutions (banks, small consulting firms etc.) as well as SMI organizations. Another project which aims at establishing a technical assistance unit for the development of industrial fisheries also seem to have the potential to embody elements of extended industrial HRD. However, the exact extent of this industrial HRD component in these projects cannot be determined at this time.

113. One of the constraints UNIDO may have faced and, for that matter, will continue to face in Sénégal is the lack of Industrial Research and Service Institutes (IRSIs), natural focal points of extended industrial HRD, which would be able to benefit from UNIDO assistance and have the means to disseminate effectively its outputs. The Institut de Technologie Alimentaire (ITA) is the closest to an IRSI and, in fact, received assistance from UNIDO in the past for the set-up of a training centre which appears to be completely inactive, if not inexistent. Although ITA provides some training through two- to three-week courses, it seems to regard this function as secondary to its research functions. Since the institute is supported by a number of donors, no clear distinction seems to be made between them and no memory existed of the 1985 project.

114. In summary, it appears that UNIDO, in the context of Sénégal, does not have a clear policy on the subject of industrial HRD and that industrial HRD components are included in projects in an *ad hoc* manner. However, it is to be recognized that the institutional framework in the country and in particular the vacuum in the matter of industrial HRD policy does not help clarify the options. In addition, at this time, without being unduly pessimistic, given the lack of dynamism of the industrial sector and its current severe condition, one may very well wonder what the needs for extended industrial HRD are going to be in the near future. There is a growing sentiment within the international community that Sénégal at mid-1992 is a terrain where one should tread lightly, and this cautionary note is even more valid in regard to the industrial sector. Already suffering from a somewhat battered image in the country, UNIDO should exercise great care before launching new initiatives in the country.

#### Other International Assistance to HRD in Sénégal

115. According to the UNDP report "Coopération au Développement: 1990", assistance to HRD amounted to \$74,665,000, representing 11.7% of total reported assistance in 1990, divided into 51% for secondary education, 28% for commercial and technical education and training and 21% for the category "others" which includes sectoral policies, as well as primary and university education. No breakdown between expenses on physical infrastructure and expenses on development of a human teaching and training capacity for each of these categories was available, although some information can be derived from the "Inventory of projects".

116. The principal donors to the HRD sector, accounting for over 94%, were:

**Table 3**

France	39,199 (\$ x 000)	52.50%
Italy	23,405	31.37%
Canada	4,133	5.54%
EC	1,691	2.26%
IDA	1,300	1.74%
Belgium	993	1.33%

The other donors were IAEA, World Bank, UNFPA, UNICEF, African Development Bank, OPEC, Japan, Switzerland, USA and USSR. It is to be noted that neither UNDP nor UNIDO are listed.

117. Most of the French contribution comprised over 500 teachers and 24 teacher trainers; out of these 151 were engaged in vocational and technical training, and 40 in technical and industrial training (the difference not being explained). The Belgian contribution all went on 33 technical teachers. The EC contribution mostly went to support regional VT centres. Almost all the Italian contribution went on the provision of scientific equipment and consumables for Dakar and Saint-Louis universities as mentioned elsewhere in this report. Out of the Canadian contribution \$2,306,000 went on the fifth phase of their support for the Polytechnique de Thiès (which has been going on for about twenty years), and \$1,101,000 on a project known as PFPS for promoting informal sector enterprises, mentioned again below.

118. As reported to the UNDP, the industry sector received aid to the value of \$18,351,000 in 1990, about 3% of the year's total. This was provided by the following donors:

**Table 4**

IDA	124 (\$ x 000)	0.66%
UNDP	614	3.35%
France	10,964	59.75%
Germany	882	4.81%
Italy	1,439	7.84%
Japan	4,328	23.58%

119. Out of the French contribution over \$10 million was in fact a loan for the expansion of a chemical plant, and the Japanese contribution was all non-project support for the purchase of Japanese products. All the UNDP aid was executed by UNIDO through two projects. Most of the German funds went on the promotion of small industries at belonging to SODIDA (mentioned elsewhere in this report) and on small enterprises elsewhere in Dakar.

120. As regards industrial HRD, the most interesting item is the Italian contribution of \$868,000 to Dakar-Marine training centre, part of a total commitment of \$3,686,000.

121. The mission visited the agencies or offices of three bilateral donors.

- ◆ It was confirmed at USAID that they have no programme specifically for industry or industrial HRD, nor for education, technical or otherwise. As mentioned below they have a programme for supporting micro-enterprises, which may or may not be "industrial" in nature.
- ◆ In regard to French aid the Caisse Centrale de Coopération Économique provides financial and infrastructural support, and is supporting Dakar-Marine in this way in preparation for privatization. The training centre comes in for its share, and is expected to be floated separately. The Ministère de la Coopération is responsible

for the teacher support mentioned above but has no specific programme for industrial HRD.

- ◆ As mentioned above CIDA supports the Polytechnique de Thiès and has done so for many years. Support goes on basic costs, technical assistance and on fees for non-Senegalese students. CIDA also has its programme for promoting informal sector enterprises.

### Assistance to Education and Training

122. There have been four IDA education sector loans over the years, and continuous French support has been provided principally in the form of "co-opérants" as teachers but also by means of financial assistance and training and advisory inputs. Many other donors have contributed in various ways and NGOs have provided parallel facilities. The current World Bank/IDA programme, PDRH, covers more than education and comprises population and health components. However, the second phase is virtually a fifth education sector loan with some accretions.

123. PDRH2 aims at root-and-branch reform of the education and training systems. It will give particular attention to primary education. The intention here is a conceptual and psychological revolution which will place "ownership" of schools firmly in the communities which they serve. No longer will they be formal and centrally directed by a distant ministry, but rather managed locally and free to offer formal or informal classes to adults (especially illiterate) as well as to children. Clearly there will still be a need for standard-setting, quality control and other aspects of coordination as in a training system, but the basic premise is that the state should provide a service rather than exercise control.

124. The reforms under PDRH2 are intended to reach into secondary and higher education. *Inter alia*, it is proposed to eliminate the separate level of middle schools and separate technical lycées. Technical qualifications will be reorganised and their respective theoretical and practical content will be defined. Exits into vocational training.

125. A separate component of PDRH2 will target the vocational training system with the aim to making it more user-driven and user-friendly, as in accordance with current World Bank policies. The system is also supposed to be user-financed; state control and intervention will be minimised. However, the MTFP does not yet share the basic point of view, which will affect actual implementation. It must also be remembered that a good deal of training takes place outside the MTFP system, either offered by NGOs, or organised by large employers in their own training centres, or under the control of other ministries. It is not yet clear to what extent these will be affected by or will benefit from PDRH2 inputs.

126. As far as the mission understands it PDRH2 will support commercial and industrial skill training, together with training in the tertiary sector such as for hotel and catering skills, but will not concern itself with management training. Nor will it cover primary (agricultural, fishery, forestry) skills, or the health sector (the focus of PDRH1). However formulation of the programme is by no means complete.

127. There is still a long way to go before PDRH2 is crystallised into specific projects and it seems likely that it will in effect be separated into several programmes, as the various components take shape. The VT component seems likely to be one of the last mainly because of the very wide conceptual difference between World Bank policy and government policy but also because so much work still has to be done on such fundamentals as the interface between the education system and vocational training, and between the training system and employers and individual beneficiaries.

### Support for Small and Micro-enterprises

128. A useful report by the Cellule d'Appui à l'Environnement des Entreprises<sup>27</sup> lists and comments on thirteen projects intended to promote small and micro-enterprises. The volume of aid was smaller than expected. ("Policies remain timid and marginal".) Projects were placed in three groups: credit, training and mixed.

#### Credit projects

1. Agence de crédit pour l'entreprise privée (USAID)
2. Programmes d'insertion et de réinsertion (Commissariat Général à l'Emploi funded by the African Development Bank and World Bank and supported by UNDP and ILO technical assistance)
3. Programmes des activités économiques (GTZ)
4. Programme de micro-intervention (Coopération Belge)
5. Projet d'assistance technique aux opérations bancaires multilatérales (World Bank and CIDA)

#### Training projects

6. Projet pour la promotion de l'artisanat (Ebert Foundation)
7. Projet promotion artisanale (European Development Fund)
8. Programme de formation et de perfectionnement au Sénégal (PFPS) (CIDA)
9. Association-Conseil pour l'Action (in collaboration with ACEP-USAID above)

#### Mixed projects

10. Projets d'appui à la création de petites et moyennes entreprises (European Development Fund and [French] Caisse Centrale de Coopération Économique)
11. Projet de pêche artisanale maritime de la région de Ziguinchor (EDF and CCCE as above)
12. Groupe opérationnelle d'étude et de coordination (GOPEC) (Commissariat Général à l'Emploi with government's own funds; started in 1978)
13. Projet d'appui aux micro-entreprises d'un quartier de Dakar (CCCE).

This is not the place to go into the variable success of these activities, but only to stress that aid is provided by the World Bank, the African Development Bank, UNDP, ILO, and U.S., Canadian, French, German, Belgian and European Community donors. Even if "timid and marginal" and only tangentially related to industrial development the varied origin and nature of the aid is well illustrated.

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<sup>27</sup> Projets de Soutien et de Création de petites et micro-entreprises - Aide bilatérale-multilatérale (hors ONG). Juillet 1991. (The "Cellule" received French aid to the value of \$640,000 in 1990 according to the UNDP Development Cooperation report.)



## 5. UNIDO'S POTENTIAL CONTRIBUTION TO HRD IN SÉNÉGAL

### General Considerations

129. The current and proposed programme of activities and various discussions in Sénégal indicate that UNIDO's contribution to industrial HRD could be strengthened and widened. However, in present circumstances little or no demand is likely to be expressed by industrial enterprises or associations: their main concern is day-to-day survival in an unstable and unfavourable commercial and fiscal environment. It must further be recalled that the industrial sector is small, probably employing some 30,000 persons in a wide scatter of sub-sectors, and that a significant number of important enterprises are foreign-owned and directly managed by their parent enterprises. Not only is the sector small but at least in terms of employment and the number of enterprises it has been declining since the New Industrial Policy was introduced in 1986. (Some 10,000 jobs seem to have been lost.) Even if the operating environment and world trading conditions look up, contrary to the prevailing pessimism, advisory assistance from an international agency would not be needed on a large scale. Such assistance would, in any case, be welcome only if well targeted and highly practical, since there is felt to be a surfeit of general and theoretical advice pouring in from many quarters. Industrial organizations and enterprises might have a tendency to view UNIDO's services with some suspicion in this respect.

130. Similarly the other potential client, namely the government, is well supplied with advice. Sénégal is in fact awash with donors, leaders, consultants, advisers, projects, studies, reports and seminars on general and particular aspects of education and training (as well as on population, health, environment, forests, women, refugees, food and any other subject on which the country is thought to need assistance). By far the most important - and to a great extent the originating and unifying - component of all the activities in the area of education and training is the World Bank programme known as PDRH, described in Chapter 3, and this virtually monopolises government attention in HRD matters; preparations for PDRH2 may also be holding up execution of some bilateral assistance in this area. The programme does cover technical and vocational training in the national context, but as we have seen the industrial component of the national context is very small.

131. Neither the government nor the extensive donor community give priority to existing "modern-sector" industry in their development programmes, although much hope and effort are devoted to the promotion of the informal sector and of small and medium-sized enterprises and industry, without any clear frontier between informal and presumably formal enterprises. Development assistance concentrates on the provision of credit facilities, supported by just enough training in the relevant procedures to make an enterprise creditworthy; the entrepreneurs are otherwise considered to know their business, even if they have not been in business before. It is unlikely that advice or assistance in human resource management or development would be seen, either by external promoters (donors and intermediate agencies) or by the beneficiary enterprises, as anything but irrelevant or over-sophisticated.<sup>28</sup>

132. The immediate prospect of demand for UNIDO's support in the area of industrial HRD in Sénégal is thus negligible. Nonetheless it is possible, and in the context of this evaluation useful, to discern potential points of contact and corresponding subjects in which UNIDO might do well to have high-quality, professional, francophone industrial HRD capacity ready to deliver services. This capacity might in due course acquire greater productivity in a wider francophone audience or market. Programmes or programme components which contribute to an understanding of the nature and importance of human resource management and development for industry and within industry should indeed complement investment promotion and technology transfer

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<sup>28</sup> The UNIDO project located in SONEPI and just getting started (see paragraph 143) is directed towards small-scale industry. Another project is under formulation: DP/SEN/91/003 - Development and financing of small-scale enterprises and industry. This project will support the government "Economic Promotion Fund", a guarantee fund financed through an African Development Bank loan. The draft report of a UNIDO/ILO programme formulation mission takes the view that training requirements are neglected in this latter kind of project and in similar projects of other donors and agencies, but these requirements are likely to be in basic operational matters such as book-keeping.

programmes in the much needed effort to rescue industry in the sub-region from its present condition of decline and depression. Under UNDP successor arrangements UNIDO might also prepare itself to provide consultancy or other services, for payment, as isolated components of programmes or projects designed and managed by other agencies or by national organizations or enterprises, but this consideration is not of course confined to the area of industrial HRD. A useful step towards identification of possible activities would be to assemble comprehensive information on industry in Sénégal and its development.

### Possible Fields of Action for UNIDO not Related to Current or Proposed Projects

#### Data collection and analysis: support to industry

133. Under PDRH the government has more than sufficient assistance with data collection and analysis even if it will be some time before the assistance bears fruit in the form of good basic statistics. One problem to be overcome here is the suspicion and disdain which private industry feels for the government and its consequent reluctance to answer questionnaires or otherwise provide reliable figures; fiscal considerations may of course contribute to this reluctance, as in many other countries.

134. UNIDO cannot intervene in these strictly internal relationships, however, it would be a step forward if industry could be persuaded that the collection of basic employment and other labour statistics is actually in its own interests and that their own policy formulation will be greatly assisted. This is one area in which UNIDO ought to be able to work together with the Conseil National du Patronat (the principal organization of private-sector employers) and with SPIDS (the organization of industrial employers which is a member of the CNP). However, these organizations do not have a good impression of the donor community in large, and UNIDO in particular, hence UNIDO would have to overcome an image barrier. There may be scope for outflanking activities, through the government itself or through non-industrial but related organizations such as training or consultancy services (AFORS for example). The Association Nationale de Gestion du Personnel might also turn out to be a responsive point of contact, although its principal members are senior managers in commerce and industry. At the centre self-promotion of UNIDO's high-quality industrial HRD capability, perhaps directly through a regular and substantial programme of publications<sup>29</sup> and indirectly as an adjunct to other UNIDO activities, would assist the slow process of rehabilitation.

135. The need for such a preliminary effort is regrettable because UNIDO ought to be able to make a practical and well-received contribution to human resource management and development. The need for good human resource management is coming to be recognised, together with the specific need for improved practices. However it is doubtful that HRD is seen as more than a bundle of personnel management and training rather than as a concept of continuous development also involving production organization, lines of authority, employees' responsibility, physical conditions of work, remuneration packages and probably other matters, with profound effects on productivity, profitability, employee satisfaction and public image, thus deserving as much and as senior attention as technology and finance (at least in non-emergency conditions). Here again publications in the form of practical manuals (but not long books on the theories of management or any such work which would require prolonged study), consultancy services and perhaps short, sharp training courses or seminars would be the means of delivery.

#### Training policy formulation: the industrial viewpoint

136. Despite the state's policy of disengagement, supported by World Bank policy, industry in Sénégal will continue to have, and to require, a relationship with the government on the question of technical education and vocational training. The nature of this relationship has by no means been decided and this is another area in which UNIDO ought to be able to offer at least a kind of menu of workable options for an agreement, and perhaps even to have a presence in

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<sup>29</sup> which would have to be in French if they are to have any impact in Sénégal.

discussions. In the context of PDRH2 it may be too late for UNIDO to contribute, but in the longer term there may still be a role.

137. On the question of the finance of pre-employment training, for example, industry in general is quite certain that the state is fully responsible for the immediately practical reason that industry has virtually no money for any purpose, not least because of high taxes and duties, and because a tax supposed to be spent on training has not been spent in this way. In these conditions the proposed "Special Fund" on which users of training facilities will be able to draw, and to which industry is to contribute, has little or no chance of acceptance. This is at present too delicate a subject for outside intervention but UNIDO should be fully informed about the schemes in use in various countries and conditions and should be available to provide information to all concerned. The fact that the proposed scheme is or is seen to be a brainchild of the World Bank will not make it more popular and a neutral opinion as to its advantages would assist objective assessment.

138. UNIDO should similarly be in a position to assist industry to decide what it can most profitably and effectively do or provide for itself, i.e. without government assistance, by way of initial training, retraining and further training at craft, technician, professional and managerial levels, either by means of in-company facilities or co-operative schemes, or simply by purchase. It should be on the basis of such analysis that industry should then be able to present clear and coherent requirements to the government.

#### Industry and PDRH2

139. As explained to the mission it is the intention of PDRH2 as understood by the World Bank to put the entire training system into an open market in which individual training centres will succeed or fail according to demand. A true free-for-all seems to be envisaged in which any centre can offer any subject or skill or combination as required by the customer; they will manage themselves and hire and fire their own teaching staff; they will similarly be free to form groups or consortia; they will be responsible for their own capital re-equipment programmes. Some institutions, such as the CNQP, are already approaching these conditions. The need for some form of coordination is recognised but its nature is still under discussion. The need is seen for registration of the content and standard of each course, as is the need for some widely (if not necessarily nationally, still less regionally) recognised and fairly measured exit standards. Since PDRH2 is mainly concerned with the education sector UNESCO is closely involved but does not necessarily have specialised experience in the design of national training systems, and it is not in fact decided which, if any, components of PDRH2 UNESCO will be executing. Although the reformed Senegalese system (if "system" is the right word) will of course cover areas of skill and knowledge other than industrial, UNIDO should surely have a contribution to make as far as training for industry is concerned, if possible in collaboration with industrial employers and trade unions, and in alliance with ILO as regards the system as a whole.

140. The government, on the other hand, has a much more centralist viewpoint, as expressed in the "Politique Nationale de Formation Professionnelle", which still has the status of a discussion document. Here the system is to be government-driven and despite all the words concerning partnership with employers and others the Ministry of Labour sees its essential functions as "planning, organization, coordination, understanding the mechanisms of the labour market, efficient regulation of training of all kinds, motivation of all the actors who participate in training and in all sectors: workers, teachers, professionals, NGOs etc".

141. As far as the mission can see a great deal more work is going to be necessary before the training component of PDRH2 is finalised in 1993 on other aspects of the training system such as curriculum reform, standards and testing, and especially finance. For instance one quarter of the proposed budget of \$28 million for this component is to go on recurrent expenditure over five years. Very careful thought must obviously be given to the continued financing of these costs from the sixth year onwards. If on nothing else, the centralist view of the government will have to be reconciled with the vision of the World Bank. Industrial users of the system are obviously going to be very interested in this aspect.

### Collaboration with ILO

142. There is plenty of scope for collaboration between UNIDO and ILO and the recent joint programming mission is an excellent example. It must be remembered that ILO has a direct relationship with employers' organizations as part of their tripartite structure, and much longer experience of working with them; furthermore the Ministry of Labour is the ILO's government counterpart. UNIDO's industry-focused activities can well complement the ILO's more general activities within the inter-organization agreement.

### Possible Reinforcement of the HRD Components of UNIDO Projects

143. SONEPI. The project just beginning entitled 'Assistance à la mise en place d'un dispositif de promotion des investissements et d'appui industriel' (DP/SEN/90/007) aims primarily, as far as the mission understands it, to reinforce the ability of small industrial enterprises or by would-be entrepreneurs to submit "bankable" investment proposals and of commercial banks to appraise them; also to reinforce the general capability of private local consultancy firms which offer advisory services to small industrial enterprises not only on investment matters but on other organizational matters and general and specialised management subjects. This is to be done through SONEPI, a para-statal organization first assisted by UNIDO over 20 years ago, and now being reorganised and partially privatised. The mission has not fully understood to what extent it is the professional capability of SONEPI'S own staff which is the object of attention, or whether the project's professional inputs are to be routed through SONEPI and dispersed in private consultancies, but it does appear that this organization is, or might be, a channel through which expertise on industrial human resource management and development could be offered.

144. Quality control of biological products. The proposed centre will, according to its title, have a training function and will thus require professional inputs in this area. Since the centre will presumably be intended to be permanent it will also need the professional (as well as financial) capacity to manage and develop its own human resources after the termination of the project.

145. Fishing industry. A project entitled "Assistance à l'établissement d'une facilité d'assistance technique pour le développement du système industriel de pêche au Sénégal" might also have the opportunity to consider the training and organizational requirements of the fishing industry. However it is not clear what the "technical assistance facility" will comprise nor whether it will be a permanent institution. The mission understands that great hopes are placed on the fishing industry as a source of export earnings, and international assistance will be plentiful. Canadian inputs have already contributed markedly to improved catches by individual fishermen. The mission does not know whether the renewable level of exploitation has been assessed, but the fish themselves will obviously impose limits on the development of this industry.

146. Other operational projects. The other nine country and regional projects listed in Part A of Annex 1 do not immediately suggest opportunities for specific HRD components, although the project design of each one of them could at least cursorily indicate what its repercussions might be. For example, "Intégration de la femme au développement agro-industriel: séchage solaire fruits légumes", which appears at present to comprise a research project at ITA, will subsequently need some component to deal with the organization of the women who are to exploit the research results. Similarly "Services consultatifs en vue d'envisager l'utilisation des phosphates naturels en engrais" might well look not only at the technical, agricultural and economic aspects of the use of phosphates as fertilisers, but also at the human-resource requirements of the hypothetical enterprise which will produce, pack, sell and distribute the fertilisers, and perhaps even the downstream requirements for retailer and user training, especially in any safety or environmental aspects. It should be emphasised that the mission has not had the opportunity to read these or other project documents and hence is not aware whether these aspects are in fact covered.

147. Projects "en cours d'examen", "en cours de formulation" and "assistance au secteur privé". None of the projects listed are self-evidently centred on HRD matters although here again they may have, or could well have, components which deal with continuing training needs in the technical field concerned, and sometimes the internal ability of the organization being created or

reinforced to manage its own human resources.

148. Input HRD. Annex 1 (as provided by the UNIDO office in Dakar) lists a number of Group Training Programmes in Section F. The mission has heard the usual criticisms of these programmes ("offer-driven") but Senegalese nominations are submitted all the same. The total francophone market is of course relatively small but if Group Training Programmes are to be pursued at all a greater proportion of francophone programmes might turn out to be quite welcome.

#### Women in Industry

149. As noted above women are targeted as beneficiaries of one current UNIDO project. This is a rural project and there may turn out to be other similar developments in which women could play the leading role. (The ILO also has a current project for the promotion of economic activities of rural women's groups.) As in other countries women are strongly represented in the world of scientific research and will thus be well involved in the operational phase of the biomedical research and development project if it attracts the necessary finance. In regard to modern sector urban industry, while there is no theoretical objection to the employment of women, specific emphasis on the encouragement or promotion of women's employment does not seem appropriate during the current phase of difficulty.

150. The mission has noted a paper presented to the National Symposium on Employment in July 1991.<sup>30</sup> This lays emphasis on the general conditions of women's lives especially in rural areas. Improved equipment for grain-milling and improved water supply have given women much more time to themselves, and this is sometimes devoted to business enterprises, usually in fishing, forestry or trade. However family planning and literacy, and a change in the socio-cultural and religious environment, need priority attention.

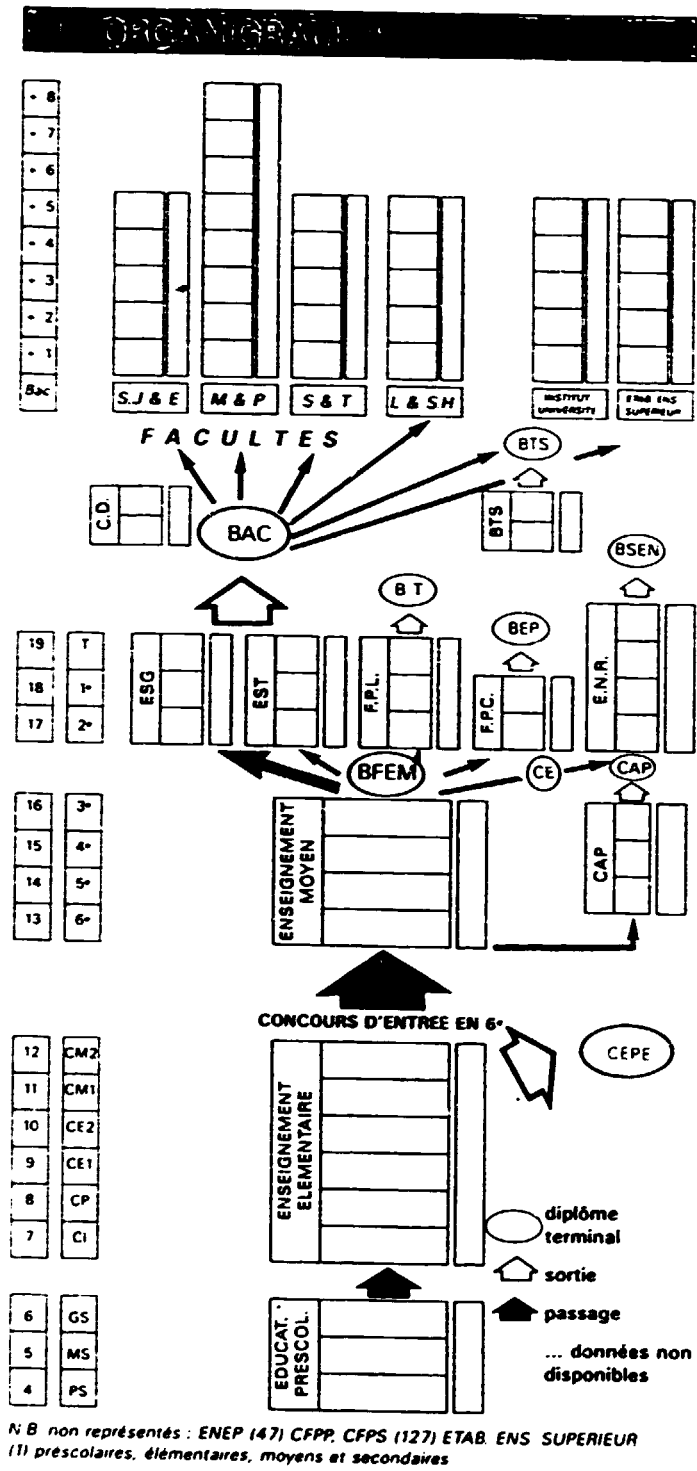
#### Possible Finance of UNIDO Activities in the Field of HRD

151. After the many references to PDRH2 in this report it hardly needs restating that this will be the principal source of finance in coming years. If it wishes to participate, UNIDO should clearly keep itself fully informed on the progress of negotiations and preparations and be ready to make specific proposals. It is not clear to the mission that any UNIDO activity under PDRH2 must necessarily become part of the UNDP country programme.

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<sup>30</sup> Promotion feminine et création d'emplois by Ousmane Ndiaye.

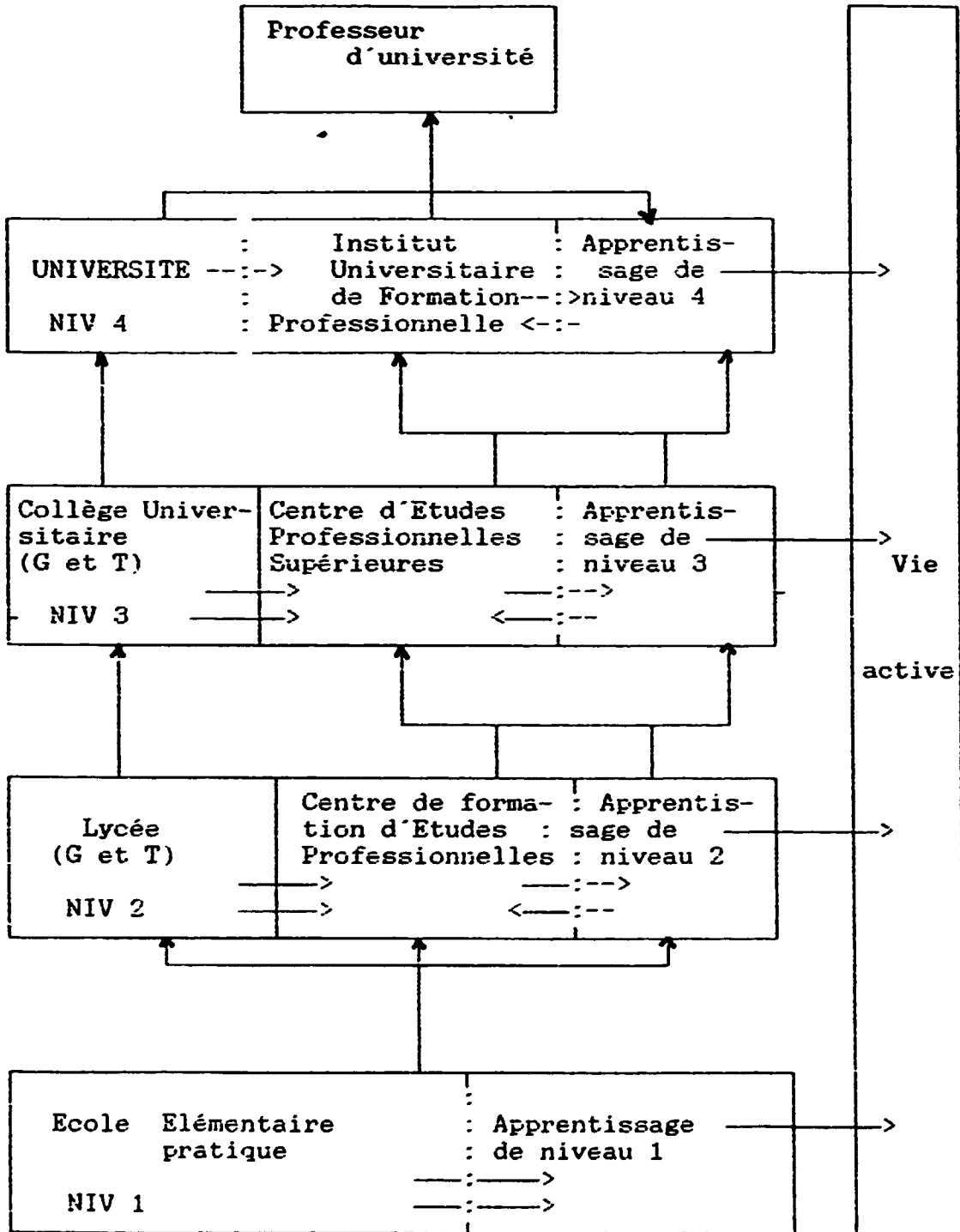
Figure 1



Sénégal, Ministère de l'Education Nationale, September 1990  
 (see paragraph 49)

Figure 2

L'ORGANIGRAMME DU SYSTEME DE FORMATION PROFESSIONNELLE



**Notes:**

1. Proposal by MTFP. See paragraph 117.
2. No return arrows from 'Vie active' to the training system, but the policy document foresees 'formation continue'.
3. It is not explained why 'Professeur d'Université' is at the pinnacle of the system and outside the 'Vie active'.

**Tables**



Senegal: Population 1990  
(000)

	UNDP (a)			
	Total	Share % (e)	Urban %	Growth %
Total Population	7,270	100.0%		2.7%
Urban (e)	2,953	40.6%		3.8%
Rural (e)	4,317	59.4%		
By regions (e)				
Dakar	1,612	22.2%	96.0%	4.0%
Ziguinchor	416	5.7%	38.0%	2.6%
Kolda	639	8.8%	10.0%	2.5%
Diourbel	660	9.1%	42.0%	3.2%
Louga	503	6.9%	15.0%	1.3%
Saint Louis	707	9.7%	27.0%	2.0%
Tambacounda	386	5.3%	16.0%	2.2%
Kaolack	857	11.8%	22.0%	2.5%
Fatick	491	6.8%	10.0%	1.6%
Thies	1,002	13.8%	34.0%	2.8%
By sex				
Males		49%		
Females		51%		
By age				

## Sources

(a) UNDP, "Senegal: Cooperation au Developpement, 1990"  
on 1988 Census data

(e) Mission estimates on 1988 Census data

Senegal: Population and Employment, 1988  
(14+ years of age)

	Total	Urban	Rural	Total	Urban	Rural
Active Population	1,841,058	638,334	1,202,724	100.0%	34.7%	65.3%
Dakar	386,059	372,938	13,121	21.0%	20.3%	0.7%
Autres Regions	1,454,999	265,396	1,189,603	79.0%	14.4%	64.6%
Working Population	1,686,544	515,910	1,170,634	91.6%	28.0%	63.6%
Dakar	296,919	286,119	10,800	16.1%	15.5%	0.6%
Autres Regions	1,389,625	229,791	1,159,834	75.5%	12.5%	63.0%

Senegal: Working population by professional Status  
and sexe, Dakar region, 1988 (10+ years of age)

Status	Total	Males	Females	Total	Males	Females
Modern Sector	191,211	132,137	59,074	43.3%	29.9%	13.4%
Non-Modern Sector	250,846	154,890	95,956	56.7%	35.0%	21.7%
Total	442,057	287,027	155,030	100.0%	64.9%	35.1%

Source: Programme cadre

Senegal: Structure of Industrial Production, 1989

Millions US\$

	(a) Current			(b) Constant base 1980			(c) Constant base 1985		
	(1) Value	%	Employment	(2) Value	%	Employment	(2) Value	%	Employment
GDP	3843	cn	100.0%						
Manufacturing						41,000			44,030
Value Added	530	cn	13.8%						
	(a)			(c)					
Gross Production	1024	e							
Value Added	294	e	100.0%	209.6	100.0%				
311 Food	118	e	40.1%	110.8	52.9%				26,138
313 Beverages	12	e	4.1%	(311)					(311)
314 Tobacco	11	e	3.7%	(311)					(311)
321 Textiles	26	e	8.8%	28.6	13.6%				5,231
322 Apparel	10	e	3.4%	(321)					(321)
323 Leather and Fur	4	e	1.4%	(321)					(321)
324 Shoes	1	e	0.3%						
331 Wood Products	1	e	0.3%	0.8	0.4%				211
332 Furniture	1	e	0.3%						
341 Paper products	3	e	1.0%	8	3.8%				869
342 Printing, Publishing	7	e	2.4%	(341)					(341)
351 Chemicals	13	e	4.4%	(353)					(353)
352 Other Chemicals	5	e	1.7%	(353)					(353)
353 Refining	15	e	5.1%	25.4	12.1%				5,363
354 Oil and Coal Products	e			(353)					(353)
355 Rubber	e			(353)					(353)
356 Plastics	e			(353)					(353)
361 Chinaware et al.	e			0					583
362 Glass	e			(361)					(361)
369 Other Non-metal. Min. Prod.	23	e	7.8%	(361)					(361)
371 Steel	e			0					92
372 Non-Ferrous Metals	e			(371)					(371)
381 Metal Works	23	e	7.8%	35.9	17.1%				5,543
382 Non-electrical Machinery	8	e	2.7%	(381)					(381)
383 Electrical Machinery	2	e	0.7%	(381)					(381)
384 Transport Equipment	11	e	3.7%	(381)					(381)
385 Prof. and Scient. Equip.	e			(381)					(381)
390 Others	e								

Notes: cn, data from National Accounts

e, UNIDO estimates, Industry and World Development, 1991/92  
(code), Included in specified branch

Source: UNIDO

(1) UNIDO, Industry and World Development, 1991/92

(2) UNIDO Global Economic Database

Senegal: Distribution of industrial companies by size and sectors, 1985

Total Sales Million FCFA	Agro Industry	Textiles	Chemicals	Metal Working	Construct. Materials	Leather Skins
More than 15,000	n.a.	1			n.a.	n.a.
15,000 > 10,000	n.a.	1			n.a.	n.a.
10,000 > 5,000	n.a.				n.a.	n.a.
5,000 > 1,000	n.a.	3			n.a.	n.a.
More than 3,000	n.a.		2	3	n.a.	n.a.
2,000 > 3,000	n.a.		2		n.a.	n.a.
1,000 > 2,000	n.a.		8	7	n.a.	n.a.
1,000 > 500	n.a.	2	1	3	n.a.	n.a.
500 >	n.a.	9	26	31	n.a.	n.a.

Dakar, Senegal: Aspects démographiques, 1991

Age	Population	Active Pop.	Activity Rate	Working Pop.	Unemployed Pop.	Unemployment Rate
0-4 (1)	239,275					
M	124,093					
F	115,182					
5-9 (1)	230,539					
M	120,182					
F	110,357					
10-14	180,431	18,262	10.1%	13,439	4,823	26.4%
H	90,518	10,978	12.1%	7,926	3,052	27.8%
F	89,913	7,284	8.1%	5,513	1,771	24.3%
15-19	177,292	72,195	40.7%	53,365	18,830	26.1%
M	88,501	47,167	53.3%	36,616	10,551	22.4%
F	88,791	25,028	28.2%	16,749	8,279	33.1%
20-24	157,508	86,184	54.7%	53,376	32,808	38.1%
M	79,810	56,197	70.4%	36,675	19,522	34.7%
F	77,698	29,987	38.6%	16,701	13,286	44.3%
25-29	137,652	94,872	68.9%	62,900	31,972	33.7%
M	67,561	60,994	90.3%	41,151	19,843	32.5%
F	70,091	33,878	48.3%	21,749	12,129	35.8%
30-34	106,175	81,322	76.6%	59,942	21,380	26.3%
M	50,866	49,158	96.6%	38,147	11,011	22.4%
F	55,309	32,164	58.2%	21,795	10,369	32.2%
35-39	91,710	73,456	80.1%	61,297	12,159	16.6%
M	47,628	46,989	98.7%	39,632	7,357	15.7%
F	44,082	26,467	60.0%	21,665	4,802	18.1%
40-44	64,867	52,774	81.4%	45,449	7,325	13.9%
M	36,308	35,872	98.8%	31,072	4,800	13.4%
F	28,559	16,902	59.2%	14,377	2,525	14.9%

45-49		44,322	35,710	80.6%	31,672	4,038	11.3%
	M	23,985	23,197	96.7%	20,359	2,838	12.2%
	F	20,337	12,513	61.5%	11,313	1,200	9.6%
50-54		37,925	29,237	77.1%	25,774	3,463	11.8%
	M	19,678	18,661	94.8%	16,023	2,638	14.1%
	F	18,247	10,576	58.0%	9,751	825	7.8%
55-59		31,699	19,633	61.9%	16,214	3,419	17.4%
	M	17,294	12,632	73.0%	9,856	2,776	22.0%
	F	14,405	7,001	48.6%	6,358	643	9.2%
60-64		23,538	11,398	48.4%	9,431	1,967	17.3%
	M	11,690	6,257	53.5%	4,631	1,626	26.0%
	F	11,848	5,141	43.4%	4,800	341	6.6%
65-69		14,902	5,466	36.7%	4,821	645	11.8%
	M	7,694	3,082	40.1%	2,437	645	20.9%
	F	7,208	2,384	33.1%	2,384	0	0.0%
70+		24,612	4,699	19.1%	4,450	249	5.3%
	M	13,093	2,718	20.8%	2,576	142	5.2%
	F	11,519	1,981	17.2%	1,874	107	5.4%
Work Age		1,092,633	585,208	53.6%	442,130	143,078	24.4%
Pop.	M	554,626	373,902	67.4%	287,101	86,801	23.2%
	F	538,007	211,306	39.3%	155,029	56,277	26.6%
Total		1,562,447	585,208	37.5%	442,130	143,078	24.4%
	M	798,901	373,902	46.8%	287,101	86,801	23.2%
	F	763,546	211,306	27.7%	155,029	56,277	26.6%

Note: (1) Children less than 10 years old are not part of the working age population

Source: Enquete Emploi, sous-emploi, chomage en milieu urbain  
Avril-Mai 1991, region de Dakar  
Projet PNUD/BIT SEN/87/013  
MEFP/DPS and CGE

Dakar, Senegal: Activity Status by Gender, Education, 1991

Level	TOTAL			WORKING			UNEMPLOYED			Having Worked			Never Worked		
	All	M	F	All	M	F	Total	M	F	All	M	F	All	M	F
Primary	169,024	116,238	52,786	119,885	87,463	32,422	49,139	28,775	20,364	22,811	15,153	7,458	26,528	13,822	12,906
Secondary	124,618	85,239	39,379	80,516	57,077	23,439	44,102	28,182	15,940	18,261	12,450	5,811	25,841	15,712	10,129
Sup. General	15,681	11,975	3,706	12,464	9,553	2,911	3,217	2,422	795	1,407	1,004	403	1,810	1,418	392
Sup. Tech.	6,650	5,582	1,068	5,807	4,958	849	843	624	219	503	435	68	340	189	151
None	260,433	147,971	112,462	217,008	122,810	94,198	43,425	25,181	18,264	27,963	17,995	9,968	15,462	7,166	8,296
Undetermined	8,816	6,909	1,907	6,452	5,241	1,211	2,364	1,868	696	820	720	100	1,544	948	596
Total (det.)	576,406	367,005	209,401	435,680	281,861	153,819	140,726	85,144	55,582	70,745	47,037	23,708	69,981	38,107	31,874
as percentage of total by columns															
Primary	29.3%	31.7%	25.2%	27.5%	31.0%	21.1%	34.9%	33.8%	36.6%	32.0%	32.2%	31.5%	37.9%	35.7%	40.5%
Secondary	21.6%	23.2%	18.8%	18.5%	20.3%	15.2%	31.3%	33.1%	28.7%	25.8%	28.5%	24.5%	36.9%	41.2%	31.8%
Sup. General	2.7%	3.3%	1.8%	2.9%	3.4%	1.9%	2.3%	2.8%	1.4%	2.0%	2.1%	1.7%	2.6%	3.7%	1.2%
Sup. Tech.	1.2%	1.5%	0.5%	1.3%	1.8%	0.6%	0.6%	0.7%	0.4%	0.7%	0.9%	0.3%	0.5%	0.5%	0.5%
None	45.2%	40.3%	53.7%	49.8%	43.6%	61.2%	30.9%	29.6%	32.9%	39.5%	38.3%	42.0%	22.1%	18.8%	26.0%
Undetermined															
Total (det.)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
as percentage of total general by row															
Primary	100.0%	68.8%	31.2%	70.9%	51.7%	19.2%	29.1%	17.0%	12.0%	13.4%	9.0%	4.4%	15.7%	8.1%	7.6%
Secondary	100.0%	68.4%	31.6%	64.6%	45.8%	18.8%	35.4%	22.6%	12.8%	14.7%	10.0%	4.7%	20.7%	12.6%	8.1%
Sup. General	100.0%	76.4%	23.6%	79.5%	60.9%	18.6%	20.5%	15.4%	5.1%	9.0%	6.4%	2.6%	11.5%	9.0%	2.5%
Sup. Tech.	100.0%	83.9%	16.1%	87.3%	74.6%	12.8%	12.7%	9.4%	3.3%	7.6%	6.5%	1.0%	5.1%	2.8%	2.3%
None	100.0%	56.8%	43.2%	83.3%	47.2%	36.2%	16.7%	9.7%	7.0%	10.7%	6.9%	3.8%	5.9%	2.8%	3.2%
Undetermined															
Total (det.)	100.0%	63.7%	36.3%	75.6%	48.9%	26.7%	24.4%	14.8%	9.6%	12.3%	8.2%	4.1%	12.1%	6.6%	5.5%

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ACTIVITES DE L'ONUUDI (au Sénégal)

(mars 1992)

A. PROJETS EN COURS D'EXECUTION

- |     |   |             |
|-----|---|-------------|
| 1.  | <u>DP/SEN/87/001</u> - Nouvelle politique industrielle  | 1.498.923\$ |
| 2.  | <u>DP/SEN/87/012</u> - Assistance à la formulation d'un programme de recherche-développement dans les domaines bio-médical et agro-industriel.                                  | 194.900\$   |
| 3.  | <u>DP/SEN/90/007</u> - Assistance à la mise en place d'un dispositif de promotion des investissements et d'appui industriel (PMI)   | 698.500     |
| 4.  | <u>TF/GLO/89/015</u> - Intégration de la femme au développement agro-industriel : séchage solaire fruits légumes  | 700.000\$   |
| 5.  | <u>SI/SEN/90/801</u> - Services consultatifs en vue d'envisager l'utilisation des phosphates naturels en engrais  | 67.000\$    |
| 6.  | <u>US/RAF/89/242</u> - Assistance préparatoire pour l'établissement à Dakar d'un Centre Régional de contrôle de qualité et de formation des produits biologiques pour l'Afrique | 142.832\$   |
| 7.  | <u>US/RAF/91/057</u> - Assistance à l'Industrie du cuir   | 430.530\$   |
| 8.  | <u>US/RAF/90/090</u> - Programme régional pour pour l'aménagement de petites centrales hydroélectriques en Afrique  | 162.100     |
| 9.  | <u>TF/RAF/89/902</u> - Promotion de l'industrie des textiles traditionnels dans les pays moins avancés de l'Afrique de l'Ouest  | 283.630\$   |
| 10. | <u>UC/SEN/91/064</u> - Assistance à l'établissement d'une facilité d'assistance technique pour le développement du système industriel de pêche au Sénégal                       | 106.000\$   |
| 11. | <u>DU/RAF//89/850</u> - Fabrication d'équipement pour le transport routier, maritime et ferroviaire en Afrique  |             |
| 12. | <u>US/INT/90/007</u> - Recyclage des huiles usées   |             |

**B. PROJETS FORMULES EN COURS D'EXAMEN**

- |   |             |
|---|-------------|
| 1. <u>UF/SEN/90/235 - Programme pilote de gestion de l'environnement</u>                      | 2.500.000\$ |
| 2. <u>Appui à l'Institut Sénégalais de Normalisation</u>                                      | 300.380\$   |
| 3. <u>Unité Industrielle de tranformation de riz (SISMAR)</u>                                 | 175.000\$   |
| 4. <u>Assistance dans le domaine de la négociation en matière de transfert de technologie</u> |             |
| 5. <u>Création d'une unité de reconditionnement de pièces de rechange (Dakar Marine)</u>      | 630.000\$   |

**C. PROJETS EN COURS DE FORMULATION**

- |  |           |
|--|-----------|
| 1. <u>US/SEN/91 - Valorisation agro-industrielle des fruits et légumes au Sénégal</u>  | 853.000\$ |
| 2. <u>US/SEN/91/124 - Installation industrielle de démonstration pour la production de biométhane</u>  | 263.000\$ |
| 3. Unité pilote de fabrication de produits agro-alimentaires par cuisson-extrusion   |           |
| 4. <u>DP/SEN/91/003 - Développement et financement des PME/PMI - Le document du projet est en cours de formulation. Ce projet portera un appui au "Fonds de promotion économique" crée par le Gouvernement (fonds de garantie)</u> |           |

**D. ASSISTANCE AU SECTEUR PRIVE**

1. Fabrication de véhicules de transport public (M. Marchand)

**E. PROGRAMME DE FORMATION**

1. Séminaires et stages de formation proposés

**F. AUTRES PROGRAMMES PROPOSES AU GOUVERNEMENT**

1. Consultation régionale sur l'industrie pétrochimique dans le paysarabes - Innsbruck Autriche, 22-25 juin.



ACTIVITES DE L'ONU DI

(mars 1992)

**A. Projets en cours d'exécution****1. DP/SEN/87/001 - Nouvelle Politique industrielle (NPI)**a) Budget: révision J (octobre 91) : 1.496.923 \$b) Etat d'avancement :

- . Les travaux du dispositif "sympa" continuent bien que les ressources permanentes pour son fonctionnement ne soient pas encore assurées.
- . Le Bureau retenu pour l'étude "Design mode" est attendu
- . Les groupes stratégiques initialement prévus n'ont pas été mis en place.
- . Le séminaire sur la GSDI est prévu pour fin Mai.

**2. DP/SEN/87/0012 - Assistance à la formulation d'un programme recherche-développement dans le domaine bio-médical et agro-industriel**a) Budget : révision G (Oct 91) 194.900 \$b) Etat d'avancement :

- . La revue tripartite tenue le 18 février a adopté le projet de programme de recherche-développement sans modifications majeures.
- . La cellule de suivi dont la mise en place a été recommandée par la revue tripartite doit dans un premier temps reprendre la formulation du programme pour présentation aux bailleurs de fonds et assurer son "marketing".

3. DP/SEN/90/007 Assistance à la mise en place d'un dispositif de promotion des investissements et d'appui industriel (PMI)

a) Budget : révision C ( Nov 91 ) 698.500 \$

b) Etat d'avancement :

L'expert national en système de promotion industrielle en poste depuis mi-janvier vient d'être rejoint par l'expert international; les contacts pris avec les différentes structures concernées doivent leur permettre de proposer à la fin de la phase préparatoire prévue fin avril, un dispositif de promotion des investissements.

Des dispositions sont en cours pour l'organisation de voyages d'études pour les cadres de la Zone Franche Industrielle de Dakar dans certains pays ayant mis en place des points francs.

4. TF/GLO/89/015 Intégration de la Femme dans le développement agro-industriel : séchage solaire des fruits et légumes:

a) Budget : révision F (Juillet 90 ) : 700.000 \$

b) Etat d'avancement :

La deuxième phase du projet va commencer avec le recrutement d'un nouveau chef de projet qui installera un nouveau séchoir solaire d'un autre type et entreprendra une étude comparative afin de recommander le séchoir qui devra être installé dans les groupements féminins.

5. SI/SEN/90/801 Services consultatifs en vue d'envisager l'utilisation des phosphates naturels en engrais.

a) Budget : 67.000 \$

b) Etat d'avancement :

Le Gouvernement a approuvée les recommandations relatives à la mise en place d'une installation pilote dont il faut rechercher le financement.

Le voyage d'étude prévu pour deux hauts fonctionnaires dchargés du projet sera organisé courant avril.

5. US/RAF/89/242 Assistance préparatoire pour l'établissement à Dakar d'un Centre Régional de contrôle de qualité des produits biologiques pour l'Afriques

a) Budget : 142.832 \$

b) Etat d'avancement :

. Le coordinateur régional et le consultant chargé de la mise en oeuvre du projet ont effectué des missions au Mali, Nigéria et Côte d'Ivoire pour demander la participation de leurs institutions aux activités du projet.

. L'aménagement des locaux devra être entrepris par le Gouvernement. En attendant certains laboratoires de la PNA et du LCCM pourront temporairement être utilisés.

7. US/RAF/91/057 Assistance à l'industrie du cuir.

a) Budget : 430.530 \$

b) Etat d'avancement

. Le contrat pour la mise en oeuvre du projet a été signé avec le Centre technique du cuir et la Société SODI (France). Courant 1992 sera effectuée la collecte d'informations statistiques, économiques, l'analyse des entreprises de la filière et le diagnostic des tanneries.

. Un modèle de simulations économiques multi-variées sera mis au point et des scénarios de relance de la filière seront proposés.

. Les autres activités dont le programme de formation sont prévues pour 1993.

8. US/RAF/90/090 Programme régional pour l'aménagement de petites centrales hydroélectriques en Afrique

a) Budget : 162.100 \$

b) Etat d'avancement

Les candidatures des experts pour l'étude de faisabilité sont toujours attendues.

9. TF/RAF/89/902 Promotion de l'industrie des textiles traditionnels dans les PMA d'Afrique

a) Budget : 283.630 \$

b) Etat d'avancement

Un séminaire régional est en cours de préparation pour le mois de Mars 1992 à Ségou (Mali)

10. UC/SEN/91/064 Assistance à l'établissement d'une facilité d'assistance technique pour le développement du système industriel de pêche au Sénégal.

a) Budget : 106.000 \$ (financement conjoint ONUDI/Banque Mondiale)

b) Etat d'avancement

Après l'accord de la Banque Mondiale il reste les formalités de mise à disposition de l'ONUDI des fonds alloués pour permettre le démarrage du projet.

11. DU/RAF/89/850 Fabrication d'équipements pour le transport routier, maritime et ferroviaire en Afrique

On attend le rapport de la mission d'identification effectuée en Mars 1991.

12. US/INT/90/007 Recyclage des huiles usées

a) Objectif :

préparer une étude d'opportunité de recyclage des huiles usées

b) Etat d'avancement :

Le rapport de la mission de consultants sur les quantités et qualités d'huiles usées récupérables est disponibles.

Le séminaire régional est prévu pour la fin de l'année..

## B. Projets formulés en cours d'examen

### 1. UF/SEN/90/235 Programme pilote de gestion de l'environnement

On attend toujours la décision des donateurs.

### 2. Appui à l'Institut Sénégalais de Normalisation

Le projet de document élaboré par l'ONUDI et soumis par le Gouvernement au PNUD sera examiné dans le cadre du 5ème programme du PNUD.

### 3. Unité industrielle de transformation du riz (SISMAR)

### 4. Assistance dans le domaine de la négociation en matière de transfert de technologie.

### 5. Création d'une unité de reconditionnement de pièces de rechange (Dakar Marine)

## C. Projets en cours de formulation

### 1. US/SEN/91.. Valorisation agro-industrielle des fruits et légumes au Sénégal

### 2. US/SEN/91/124 Installation industrielle de démonstration pour la production de biométhane

### 3. Unité pilote de fabrication de produits agro-alimentaires par cuisson-extrusion

### 4. DP/SEN/91/003. Développement et financement des PME/PMI. Le document du projet est en cours de formulation. Ce projet portera un appui au "Fonds de promotion économique" créé par le Gouvernement (fonds de garantie...)

## E. Assistance au secteur privé

### 1. Fabrication de véhicules de transport public ( Marchand )

Le projet est en cours de formulation et de recherche de financement à l'ONUDI.

### 2. Aucune évolution pour les projets suivants :

- Fabrique de carreaux
- Coentreprise dans le domaine de la pêche avec une société soviétique
- Fabrication de spirales antimoustiques
- Exploitation industrielle des marbres du Sénégal
- Fabrication industrielle de matériel didactique

## F. PROGRAMME DE FORMATION

### Séminaires et stages de formation proposés

1. Séminaire de perfectionnement dans le domaine de l'entretien et la réparation du matériel roulant ferroviaire. Belgique, Cameroun du 22 janvier au 10 mars 1992
2. Séminaire sur l'évaluation des projets industriels du 03 au 28 février 1992, Ahmedabad (Inde)
3. Séminaire sur les industries textiles traditionnels, Ségou, Mali du 9 au 16 avril 1992
4. Programme régional de formation à la maintenance, entretien et réparation des équipements portuaires 15 juin- 3 juillet 1992
5. Workshop on quality and hygiene regulations in fisherie industry Shetland Islands 6-10 juillet 1992
6. Stage formation dans domaine transformation fruits et légumes Gebze - Turquie - 29 août - 11 octobre 1992

7. Stage de formation dans domaine industrie sucre - Ankara, Turquie du 14 septembre au 6 novembre 1992
8. Voyage d'étude dans le domaine industrie ciment du 28 septembre 1992. Ankara Turquie

F. Autres programmes proposés par le Gouvernement

1. Réunions de consultation

Consultation régionale sur l'industrie pétrochimique dans les pays arabes - Innsbruck Autriche, 22-25 juin 1992.

**PERSONS CONSULTED****Primature<sup>31</sup>****Commissariat Général à l'Emploi**

M. Massar Touré Niass  
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M. Manamba Mbengue  
Démographe-Planificateur

**DP/DTCDD/87/010 - Renforcement du Système National de Planification**

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**M. Moussa Faye**  
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**M. Fara Mbodj**  
Conseiller Technique

**DP/SEN/87/001 - Mise en oeuvre et approfondissement de la Nouvelle Politique Industrielle**

**M. Djibril Ndiaye**  
Conseiller Technique Principal

**Ministère de la Modernisation de l'État et de la Technologie**

**Bureau Biotechnologie/Environnement à la Délégation des Affaires Scientifiques et Techniques**

**DP/SEN/87/012 - Assistance à la Formulation d'un Programme recherche-développement dans les domaines biomédical et agro-industriel**

**M. Prosper Guy Howeto**  
Project coordinator

**Ministère du Travail et de la Formation Professionnelle**

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**Société Nationale d'Étude et de Promotion Industrielle (SONEPI)**

**M. Ibrahima Cissé**  
Chef du Département Promotion Information Industrielle et Formation

**DP/SEN/90/007 - Assistance à la Mise en Place d'un Dispositif de Promotion des Investissements et d'Appui Industriel (PMI)**

**M. Ali Sow**  
Project Coordinator

**Société de Gestion du Domaine Industriel de Dakar (SODIDA)**

**M. El-Hadji Sylla**  
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**M. Diallo Diop**  
Chef de la Division Information

**Ambassade de France**

**M. M. Pourret**  
Mission de Coopération

**Ambassade du Canada**

**M. Edouard Louli**  
Premier Secrétaire, Contrôleur et Conseiller Financier

**USAID**

**M. Amadou Ly**  
Responsable du Projet, Projet de Développement des Collectivités Locales et l'Entreprise Privée en Milieu Rural

**M. Ousmane Ndao**  
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**ONUDI**

**M. Moriké Konaré**  
Directeur de l'ONUDI pour le Cap-Vert, la Gambie, la Mauritanie et le Sénégal

**Mme. J. Beye**

**Members of the mission to Sénégal**

**Mr Charles Manton  
UNIDO Consultant**

**Mr Alain S. Théry  
UNIDO Consultant**

**Dates of the mission**

**28th June to 17th July 1992**