




The Green Economy Barometer 2018

Senegal

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Senegal

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About the organisations

This report has been produced by **IED Afrique** and **IUCN Senegal**, both members of the Green Economy Coalition.

The **International Union for Conservation of Nature (IUCN)** was founded in 1948 in order to influence, encourage and assist societies throughout the world to conserve the integrity and diversity of nature and to ensure that any use of natural resources is equitable and ecologically sustainable. The IUCN's Senegal Office is based in Dakar.

Innovation, Environnement et Développement en Afrique (IED Afrique) is a Senegalese non-profit organisation working in francophone West Africa. Its work centres around sustainable development, emphasizing community resilience building, social accountability for effective delivery of public services, natural governance with a focus on equitable access to water, land and forest resources. IED achieves this through research, policy advocacy and network building.

Together, they lead the Green Economy Coalition Senegal hub, an ongoing initiative to accelerate a national transition to a green economy. For more information, please see our respective websites.

The **Green Economy Coalition (GEC)** is the world's largest civil society movement for green and fair economies. Our 50+ members represent poor people, workers, environmental organisations, faith groups and small businesses as well as international institutions. Together, we are inspiring a movement for change from the ground. www.greeneconomycoalition.org

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Senegal's green economy

Making the transition to a fairer future

The **Senegal Green Economy Barometer 2018** provides a snapshot of the transition to a fair, green economy. It is drawn from evidence of policy progress as well as the insights of civil society organisations who are tracking the transition on the ground.

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In the last few years questions about the green economy and green growth have featured more frequently in national discussions about environmental protection, poverty reduction and sustainable development.

A decade of crises in the climate, biodiversity, energy, foodstuffs, water – and more specifically, the 2008 crisis in the global financial and economic system – has raised awareness of the impact that the misallocation of capital has had on renewable resources.

Economic growth at the global level has come at the cost of severely depleted and degraded natural capital: 60% of the major global environmental goods and services on which livelihoods depend are now degraded or have been used in unsustainable ways.

There is no doubt that Senegal is currently predisposed to move towards a green economy, although this is still quite a new concept to the country and is not fully understood by all those working on various aspects of the environment and sustainable development.

Nevertheless, the existence of planning and legal frameworks and related projects/programmes shows that there is the political will to make the green economy a key link in the policy on sustainable development and poverty reduction, and commitment by other actors to support the government in this.

Doing so will entail identifying, supporting and exploiting opportunities in the most promising sectors for job creation and environmental protection – energy (especially renewable energies), building and construction, transport, basic industries, agriculture and forestry.

The target indicators are: (i) the number of rural youth (girls/boys) working on farms, and (ii) the number of mechanisms for creating green job opportunities.

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Background & context



“ Senegal is currently making steady progress with its national development objectives, with the economy growing at +6.5% every year since 2015.

Senegal is currently making steady progress with its national development objectives. Its economy grew by over 6.5% in the three consecutive years since 2015, with estimated growth rates of 6.9% in 2017, 6.7% in 2016 and a projected rate of 7% for 2018 and 2019. The main drivers of this

growth are dynamic agriculture and tourism sectors, and public investment in energy, agriculture and infrastructures through the Emerging Senegal Plan (PSE), which will run until 2035

However, economic growth has been out of step with demographic

growth in recent years. Although the proportion of the population living below the poverty line has fallen by 1.6%, from 48.3% to 46.7%, the number of Senegalese people regarded as ‘poor’ has risen from 5.7 to 6.3 million. A large proportion of the rural population is affected by food insecurity, especially in periods of drought, and rising unemployment is particularly prevalent among the young and in urban areas. Inadequate infrastructures and the high cost of electricity have also taken their toll on the private sector, which no longer creates sufficient jobs.

The country is also hampered by its limited sources of growth and low resilience to external shocks. The main constraints to economic growth are the low productivity and high cost of production factors, underdeveloped human capital and the difficulties that SMEs face in accessing finance. The economy is also adversely affected by quantitative and qualitative deficiencies in the infrastructure, the weakness of the industrial fabric and low level of private investment in production sectors.

Although the external conditions remain unconducive to growth, the economic prospects for the coming period are encouraging – for the time being at least. The main drivers

of growth are in Senegal’s primary and secondary sectors. Together they account for 85% of GDP, which is mainly generated in the following sub-sectors: construction and public works, fish and meat production, processing groundnuts, transport and tourism. In addition to this, remittances from Senegalese nationals living abroad play a key role in stimulating private consumption, several major infrastructure and mining projects are helping revitalise the wider economy, and the State is rolling out measures to attract the investment it needs to promote solid, sustainable and inclusive growth.

Some 75% of the Senegalese population is highly dependent on rainfed agriculture, which is increasingly threatened by climate change, unstable weather patterns, a growing number of extreme weather events (particularly droughts) and drier soils. While these problems certainly need to be tackled at the global and regional levels, the government also needs to take measures to improve land management, consolidate agricultural outreach services and facilitate producers’ access to markets and essential inputs. It has accordingly launched an intensive reforestation and water resource management project in the context of its national adaption programme.

The secondary sector grew by a remarkable rate of 6.7% in 2016 and 7.7% in 2017, when it accounted for 23.8% of GDP. This was largely due to the performance of small-

“ The number of Senegalese people regarded as ‘poor’ has risen from 5.7 to 6.3 million.

“ Senegal needs to make structural changes to foster a more productive economy, and has made considerable progress in recent years.



scale industries (13.2% of GDP) that process and preserve meat and fish, process cereals and manufacture food products.

A vigorous construction sub-sector (6% of GDP) also contributed to the strong performance of the secondary sector in 2017, as did the consolidation of mining activities. The secondary sector should be able to achieve a growth rate of 8.6% in 2018, thanks to the combined effects of a dynamic agriculture sector on agri-food production, PSE-driven construction and equipment on building and public works, and the commissioning of several solar power plants and a coal-fired power plant in Sendou.

The World Bank report Doing Business 2018 ranked Senegal 140th

out of 190 countries. More specific analysis looked at its progress in terms of business creation (63rd), connection to an electricity supply (118th), property transfers (121st) and execution of contracts (142nd). Phase II of the three-year sliding programme to reform the business environment and competitiveness (PREAC – 2016-2018) did result in some improvements in 2017, as electricity prices fell by 10% and the cost of property transfers dropped from 22% to 8% of the value of the assets concerned.

This paper describes the progress that Senegal has made in moving towards a green economy and the main challenges it faces in making this transition.

Valuing nature



These efforts helped Senegal retain much of its biodiversity until the 1970s, when its biodiversity and natural resource base were significantly altered by two powerful factors: drought and strong demographic growth. Both had major repercussions on virtually all the traditional logics that had previously shaped access to and control over natural resources.

Recognising the role and importance of biological diversity at every level, and the many threats to its constituent elements, Senegal signed and ratified the Convention on Biological Diversity (CBD) in 1994. Having made this solemn pledge to help achieve the objectives set by the Convention, the government developed a National Biodiversity Strategy and Action Plan (SPNAB, 1988) structured around four major strategic objectives:

- conserving biodiversity in high density sites,
- incorporating biodiversity conservation into production programmes and activities,
- ensuring that the roles, responsibilities and benefits of biodiversity management are distributed equitably,
- informing and raising all actors' awareness of the importance of biodiversity and the need to protect and maintain it.

Located on the western edge of mainland Africa, Senegal includes about 700km of coastline and spans three climate zones (Sahelian to the north, Soudanien in the centre and sub-Guinean to the south).

This is a country with varied ecosystems and rich flora and fauna, whose diversity and potential underpin the main sectors of socio-economic development (agriculture, livestock, fisheries, etc.). Natural resources play a key role in the nation's food, economy, health, education, aesthetics, recreation, society, culture and, above all, its ecology.

Mindful of the fundamental role that nature plays in local livelihoods and various development sectors, the Government of Senegal and its partners have invested considerable effort in protecting and developing its natural resources.

Official measures to do this include creating protected areas (reserves, classified forests, parks, etc.) and adopting texts and regulations to reinforce traditional conservation practices based on empirical knowledge (cemeteries and places of worship, sacred forests and woods, agro-forestry parks, totems, etc.).

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Green must be fair

There is a negative correlation between the rate of growth and economic inequalities in Senegal. In other words, poverty becomes more visible as the growth rate increases.

Indeed, economic growth has been out of step with demographic growth in recent years. Although the proportion of the population living below the poverty line has fallen by 1.6%, from 48.3% to 46.7%, the number of Senegalese people regarded as 'poor' has risen from 5.7 to 6.3 million.

A large proportion of the rural population is affected by food insecurity, especially in periods of drought, and rising unemployment is particularly prevalent among the young and in urban areas. Inadequate infrastructures and the high cost of electricity have also taken their toll on the private sector, which no longer creates sufficient jobs.

Despite the progress it has made, Senegal is still categorised as a country with low human development. In 2016, it ranked 162nd out of the 188 countries on the United Nations Development Programme (UNDP) Human Development Index. The most recent household survey on poverty, which was conducted in 2011, showed that 46.7% of indi-



viduals lived below the poverty line compared with 48.3% in 2006.

In 2016, the UNDP's Multidimensional Poverty index found that about 53% of the population lived in multi-dimensional poverty, with about 31% of these individuals experiencing severe deprivation. The figures for education (43.6%), health (23.1%) and living standards

(33.4%) are a good indication of the challenges people face in accessing basic social services.

A 10% rise in the reported number of poor people in Senegal between 2009 and 2015 is not simply the result of strong demographic growth and higher levels of poverty in rural areas, but also due to more targeted poverty indicators.

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“ The government has launched a joint \$5 million programme with UNDP in 2016, to create green employment opportunities in the agriculture, industry and service sectors.

It is also worth noting that poor people without access to alternative sources of income are often forced into behaviours that damage their natural capital (such as using timber for firewood rather than construction), and that actions taken on behalf of poor people are not always in line with green investments.

The national strategy for Economic and Social Development (SNDES) seeks to address inequalities and reduce the impact of shocks that

directly threaten people's lives and livelihoods.

The government also launched a joint \$5 million programme with UNDP in 2016, to create green employment opportunities (Pacev) in the agriculture, industry and service sectors.

Its ultimate aim is to create 100,000 jobs in the green economy (4,000 direct and 6,000 indirect), thereby helping reduce unemployment and under-employ-

ment among youth and women, creating wealth and protecting the environment.

The agricultural sector (which includes fishing, forestry and live-stock) accounts for about an eighth of Senegal's GDP but employs three-fifths of the working population.

Producers in northern Senegal have to contend with advancing desertification, which has already claimed the equivalent of 5% of agricultural production due to losses of fertile land. Reduced access to natural resources and uncertain food production will make poor people even more vulnerable as yields are predicted to fall by between 5% and 25% in the coming decades.

Greening economic sectors

Economic growth in Senegal is currently driven by the intensive use of natural capital and by carbon-consuming technologies, and is largely maintained by behaviours that generate huge amounts of waste. Therefore, priority actions on the green economy should also focus on agriculture, increased use of renewable energies, and SMEs.

Agriculture

The agricultural sector (which includes fishing, forestry and livestock) accounts for about an eighth of Senegal's GDP but employs three-fifths of the working population. Overall productivity is low and most families in rural areas grow millet and other basic foodstuffs for their own consumption.

Rice is the main staple food in Senegal, which currently imports 700,000 metric tons of rice a year (and produced 375,000 metric tons in 2016). These rice imports cost the country \$135 million, leaving it exposed to



the risk of sudden price increases on international markets.

Climate change and desertification have made agricultural activities increasingly difficult due to drier soils, coastal erosion and the growing incidence of extreme weather events, especially droughts. Only 2%

“ Having replaced diesel for less contaminant natural gas vehicles reduced the transport sector impact during the last decade.





“We believe that solar power will play an important role as production costs become more competitive.



of agricultural land is irrigated, which means that the vast majority of farmers are reliant on rainfall. Producers in northern Senegal have to contend with advancing desertification, which has already claimed the equivalent of 5% of agricultural production due to losses of fertile land.

Reduced access to natural resources and uncertain food production will make poor people even more vulnerable as yields are predicted to fall by between 5% and 25% in the coming decades.

To address this situation, the government is determined to revitalise the agricultural sector through a series of complementary strategies to stimulate productivity and increase adaptive capacities.

Now more than ever, the country needs to adopt environmentally friendly land and water management practices, develop irrigation on a large scale (particularly through surface water and potential runoff) and broaden access to markets and essential inputs. Doing this will entail

“Reduced access to natural resources and uncertain food production will make poor people even more vulnerable as yields are predicted to fall by between 5% and 25% in the coming decades.

strengthening national and regional agricultural institutions so that they can contribute to agricultural research and outreach services and maintain quality levels.

Energy

Replacing investments in high carbon-emitting energies with investments in clean energy would increase the penetration of renewable energies in electricity production by 30%; while green investments in the forestry sector would help reduce deforestation and increase reforestation. The transition to a green economy would help increase forest cover (which currently stands at 8,200 hectares) by a little over 6% in 2025 and by nearly 28% in 2035.

“Having replaced diesel for less contaminant natural gas vehicles reduced the transport sector impact during the last decade.

Senegal has also invested a lot of effort in green energies. On 22 October 2017, Senergy 2 opened a large solar power plant in Malicounda with 75,000 photovoltaic panels capable of producing 20 megawatts (MW), and a new plant in the west of the country with 11,000 additional panels producing 22 MW of solar energy.

In January 2018, a new 30 MW solar voltaic plant was inaugurated in Santhiou Mékhé in the region of Thiès (70 km west of Dakar). Costing €36 million (a little over 24 billion francs CFA) and covering 64 hectares of

land, this is regarded as the biggest plant of its kind in West Africa.

Senegal has chosen to develop an energy mix that includes the option of generating clean energy, which should soon enable it to reduce the cost per kilowatt/hour (kWh) and provide the power its population needs (...) We believe that solar power will play an important role as production costs become more competitive.

SMEs

Senegalese SMEs/SMIs are a driving force in the national economy, particularly in terms of job and wealth creation and mobilizing economic and social resources.

In 2013 there were 1,271 enterprises in Senegal, many of them in the food industry (49.8%). The secondary sector's contribution to GDP fell from 32% in the period 1990-1994 to 19% in the period 2006-2012.

Most Senegalese businesses are SMEs. They play an important role in

“SMEs are a driving force in the national economy, particularly in terms of job and wealth creation and mobilizing economic and social resources.

poverty reduction, economic growth and as a stepping stone to economic emergence. Much of the secondary sector's contribution to GDP comes from agri-food industries (4.7%), followed by construction (4.2%) and then extractive industries (2%).

According to ANSD data cited by the Industry Observatory, the country's manufacturing sector is dominated (in terms of added value) by food industries (29.9%), building materials industries (19.3%), chemicals (16.6%) and the water-energy sector (15.7%). Over the last decade the industrial sector as a whole has been affected by a number of problems caused by:

- The high cost of production factors (especially energy);
- Low level of capitalisation;
- The small scale of the local market and modest level of exports in the sub-region (ECOWAS, common market) due to lack of competitiveness;
- The slow pace of reforms relating to the business climate;
- High concentration of the industrial fabric in the region of Dakar (90%);
- Access to and the cost of finance, and access to land;
- Weak management and governance;
- Poorly coordinated support and technical assistance for SMEs.



Reforming Finance



The transition to a green economy will only happen if there is an attractive investment climate and policies in place that offer financial incentives. The State plays a key role in designing and enforcing such policies and their implementing instruments, working in close cooperation with the private sector.

To sustain this dynamic of green industrial development, it needs to ensure that there is a sufficiently attractive investment climate and financial mechanisms, and genuine incentives for a change of paradigm

Putting in place instruments such as the Priority Investments Guarantee Fund (FONGIP), the Sovereign Strategic Investment Fund (FONSIS) and the National Economic Development Bank (BNDE) constitutes a first step in facilitating

access to capital and guarantees for entrepreneurs, and also offers new investment opportunities for Senegalese SME/SMIs. However, the current funding criteria need to be amended to include references to the green economy.

One good practice that the Government of Senegal currently supports is the investment facility promoted by the SUNREF project (Sustainable Use of Natural Resources and Energy Finance), which was set up to encourage green investment projects. SUNREF is financed by AFD in partnership with SGBS banks (Senegal programme) and ORABANK (regional programme), and implemented by enterprises that wish to promote energy efficiency and renewable energies in their production processes.

The government acknowledges that much more needs to be done in this domain, and has made improving and aligning public policies one of its priorities. Thanks to its Programme to Reform the Business Climate and Competitiveness (PREAC), Senegal does seem to be reaching a turning point with its economic policies, especially those designed to improve the business climate.

Senegal needs to make structural changes to foster a more productive economy, and has made considerable progress in recent years with the creation of an ambitious portfolio of public-private partnerships.

In this respect it has led the way for other low-income countries, using dedicated development funds to mobilize private investment and launch a series of major projects, such as the Dakar-Diamniadio toll motorway, the modernisation of Blaise-Diagne international airport, and two large power plants in Kounoune and Sendou.

These projects are supported by an agency responsible for the promotion of investments and major projects (APIX), and a soft infrastructure of regulatory measures designed to create favourable conditions for such investments. This model of private-public partnerships is already attracting interest in other African countries.

Photo credit: John O. Nolan / Unsplash

Measuring what matters

The government has invested considerable effort in the transition towards a green economy, helping define a strategic framework on the green economy, putting in place tools to aid decision making, and promoting green industrialisation and the development of green jobs and businesses.

Since 2012 it has also sought to harmonise legislative and regulatory texts and international and regional instruments with the green economy and get them ratified by the State, to provide a more favourable environment for the promotion of the green economy. This process has accelerated over the last year with:

- The finalisation of decrees on tax incentives aimed at reducing the high cost of electricity in rural areas, notwithstanding the weak economic capacities of rural populations;
- The signing of decrees on biofuel blends and uses;
- Validation of the national strategy for job promotion (SNEV);
- The consolidation of national initiatives on the green economy;



- The creation of a space for stakeholder consultation and dialogue.
- The new government is determined to achieve a good level of sustained, sustainable and inclusive growth, using the Emerging Senegal Plan (PSE) 2035 as the framework for its medium- and long-term economic and social policies. The strategic guidelines for initiatives to translate this framework into concrete actions and tangible outcomes for the country's population focus on three main areas.

- Structural transformation of the economy by consolidating current drivers of growth, developing new sectors that generate wealth, jobs and social inclusion, and strong capacity to export and attract investments. The aim here is to achieve more balanced development and promote economically viable areas and hubs in order to stimulate development across the whole territory;
- Make significant improvements in people's living standards and more sustained efforts to combat social inequalities, while protecting the resource base and fostering the emergence of viable territories;

“The government has invested considerable effort in the transition towards a green economy.”

“The private sector needs to be brought into the discussion to convince them of the benefits of the green economy.



advisors, relevant ministerial departments, the private sector and different development structures.

Actors from the private sector to need to be brought into the discussion to convince them of the benefits of engaging with the green economy in Senegal, as some regard it as very expensive and feel that current financial provisions would not make such a transition beneficial for them.

Various initiatives are currently under way to support the drive towards sustainable development. These include evaluating implementation of the national strategy for the conservation of biodiversity, identifying scheduled national contributions (CPDN) to adaptation and mitigation, formulating the National Strategy for Sustainable Development (SNDD), and starting to implement the medium- and long-term national Adaptation Plans (PAN).

As Senegal is committed to promoting mechanisms for sustainable consumption and production (SCP), the international community could use these crosscutting mechanisms as one of the main strategic levers to start the greening of its industrial sector.

Civil society organisations are also working on other initiatives, such as the CSR Initiative. This started promoting corporate social responsibility (CSR) in Senegalese enterprises and West African countries in 2008, and seeks to support models for business, public organisation and economic development that include a CSR element.

- Strengthen security, stability and governance, protect rights and freedoms and consolidate the rule of law in order to create the best conditions for social peace and facilitate the full development of the country's potential.

In order to promote inclusive and sustainable development, Senegal is in the process of developing a strategic framework for the green economy and industrial policies and laws that comply with environmental norms and standards. Its development trajectory is shifting as a result of:

- the desire to strengthen investments and create an incentive framework to stimulate action by the private sector;

- defining new, innovative forms of intervention that combine voluntary processes with appropriate regulations and fiscal measures;
- promoting a collaborative setup that will foster complementarity between the private and public sectors;
- establishing a multi-stakeholder framework for consultation in order to develop instruments to harmonize, share and optimise the available resources by building on expertise and national investments.

The national platform on the green economy was set up to establish a framework for governance of the green economy that includes elected local officials, parliamentarians,

Where next for Senegal?

Policymakers need to promote new behaviours and development models to address growing concerns about the impacts of climate change, the challenges of an open global economy and the need to be highly competitive and innovative.

In broad practical terms, the green economy is favourable to human wellbeing, balanced biodiversity and the development of equitable ecosystem services for current and future generations. At another level, using the green economy as a new model of strategic deployment calls for planning policies, strategies and programmes based on knowledge and understanding of sustainable development, in order to improve living conditions at the regional, national and local levels.

In view of Senegal's level of development and natural resource base, the greening of its economy will require a framework of action to put in place incentives and institutions that increase wellbeing by improving resource management and stimulating productivity; encouraging economic activity in domains where it will generate more benefits for society in the long term; and finding new ways of achieving these two first objectives.

“At the moment, national plans are focused on economic growth rather than social development.



“The green economy is favourable to human wellbeing, balanced biodiversity and the development of equitable ecosystem services.

This will mainly be done through regulatory policies that influence the direction of growth, market-based instruments, the capacity to find the finance needed to put in place infrastructures that are resilient to climate change, and the institutional capacity and governance to implement reforms in the field of public action.

In addition to current capacity-building actions to enable actors to appropriate new methodological tools and other mechanisms (analytical tables, environmental impact assessments, strategic

analysis, etc.), the structural reforms needed to meet the requirements for development in Africa will also entail envisaging new political choices and ecologically viable technologies.

In choosing to work on the theme of 'the green economy in Senegal, IUCN and IED Afrique are contributing to the definition of new strategic guidelines for the development of fruitful policy dialogue in Senegal in a way that takes account of current and prospective technological, financial and institutional opportunities.

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The next frontier

The Green Economy Coalition Senegal hub is part of a network of 50 international organisations championing the role of civil society in the shift to green and fair economies. The Green Economy Coalition is committed to ensuring that the transition leaves no one behind and restores the natural world.

Together, its members champion the voices of marginalised communities, particularly poor groups, small enterprises and informal workers, in national economic policy development.

Our vision of green, fair economies offers a positive agenda for cooperation. It offers hope to communities and sectors that have been left behind by globalisation. The green transition is already happening around the world, but we must ensure it is rooted in local economies, brings real investment to the ground, and is owned and shaped by the people.

The **Green Economy Coalition's** global response to the state of the green economy agenda:

- ✓ **We have launched a 7 year programme - Economics for Nature – to ensure economic policymaking recognises natural capital.**
- ✓ **We are driving new research into natural capital and valuing our ecosystems.**
- ✓ **We are tracking the ongoing transition towards fairer, greener economies, across governments, industries and societies.**
- ✓ **We're looking to expand our base of 7 GEC national hubs across the world, pioneering community action.**
- ✓ **We are stepping up our focus on small and informal green economies.**
- ✓ **We are championing the voices of civil society and communities in the development of green economy national plans.**

