

BTI 2016 | Senegal Country Report

Status Index	1-10	6.11	# 51 of 129	
Political Transformation	1-10	7.15	# 34 of 129	➔
Economic Transformation	1-10	5.07	# 79 of 129	➔
Management Index	1-10	6.65	# 16 of 129	
	scale	score	rank	trend

This report is part of the Bertelsmann Stiftung's Transformation Index (BTI) 2016. It covers the period from 1 February 2013 to 31 January 2015. The BTI assesses the transformation toward democracy and a market economy as well as the quality of political management in 129 countries. More on the BTI at <http://www.bti-project.org>.

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Key Indicators

Population	M	14.7	HDI	0.485	GDP p.c., PPP \$	2292.3
Pop. growth ¹	% p.a.	3.1	HDI rank of 187	163	Gini Index	40.3
Life expectancy	years	63.4	UN Education Index	0.368	Poverty ³	% 66.3
Urban population	%	43.4	Gender inequality ²	0.537	Aid per capita \$	69.1

Sources (as of October 2015): The World Bank, World Development Indicators 2015 | UNDP, Human Development Report 2014. Footnotes: (1) Average annual growth rate. (2) Gender Inequality Index (GII). (3) Percentage of population living on less than \$3.10 a day at 2011 international prices.

Executive Summary

President Sall has initiated a phase of political, economic and social transformation since his election in 2012. Currently, his government enjoys high political and financial support internationally, especially from France and the United States. In February 2014, Sall presented his development program, the Plan Sénégal Emergent (PSE), at the donor countries' Advisory Group in Paris and received considerably more financial support than required.

A central campaign promise had been to bring an end to the conflict in the southern province of Casamance. The government accepted mediation by the Italian Sant'Egidio association in Rome, a catholic laymen's organization. The talks are supported by the Vatican and several European countries. The association, however, has so far only reached one of the four rebel factions. Other Senegalese organizations, some of which have a mandate from the government, are undertaking efforts to reach out to the rebels. The leader of the military arm of the MFDC (Mouvement des Forces Démocratiques de la Casamance), Salif Sadio, announced a unilateral ceasefire in April 2014. In this unclear situation between war and peace, the government has begun to build up the infrastructure of Casamance, the agricultural potential of which has so far been underdeveloped.

Legislation to reform the regulation of the media, the Code de la Presse, has been blocked since 2010 in the National Assembly, largely because of skepticism concerning the planned decriminalization of journalists' activities. The strict media laws that exist have at times led media sources to be extremely cautious when covering issues involving major officeholders and religious leaders. Although this might to some degree foster self-censorship, there are no systematic limitations on reporting, and the media are outspoken and critical when it comes to unveiling major political scandals.

The local elections in June 2014 were a highly anticipated first test of the governing coalition's popularity. It suffered heavy losses in parts of the country. Aminata Touré, the prime minister, lost her race and was replaced by the technocrat and long-time associate of President Sall, Mahammed

Dionne. The losses incurred by the parties supporting the government can in part be explained by a proliferation of competing lists. Occasionally, candidates from the governing coalitions competed against each other as part of different lists. Dakar's popular mayor, Khalifa Sall (Socialist Party, PS), was re-elected and is therefore considered one of the main contenders of Macky Sall in the next presidential election, most likely in 2017.

The 2010 law providing for gender-balanced electoral slates was not implemented in Touba, because the leader of the Mourides Muslim brotherhood, the Khalif, did not accept it. There was little protest and no legal consequence resulting from this defiance. The fact that Touba ignored the law without any consequences shows the continued power of the Mourides brotherhood.

Former President Wade's son Karim has been imprisoned since March 2013. The trial against him began in summer 2014. He was first accused of embezzling one billion euro during his tenure as "super minister," now the charges concern €178 million. Karim Wade considers himself a political martyr who is subject to a political show trial. While the trial is an important symbol in the fight against government corruption, the reversal of the burden of proof – Karim Wade has to demonstrate the legality of his wealth – has rendered inoperative a fundamental principle of the rule of law.

The Ebola crisis that severely affected several West African countries beginning in the spring of 2014 was very well managed by the Senegalese government. The government implemented a very effective information campaign through the media and text messages. There was a single case of illness caused by a Guinean student who had entered the country illegally. Senegal was declared Ebola-free on October 17, 2014.

History and Characteristics of Transformation

Since its independence in 1960, Senegal has figured as a politically exemplary country in West Africa despite a relatively short period of one-party rule. The party of the country's first president, Leopold Senghor, which was renamed Parti Socialiste (Socialist Party or PS) in the 1970s, ruled the country for over 40 years. The beginning of the country's political transformation dates back to 1976, when the one-party state authorized the existence of three political parties. The PS won the first free election in 1978 with more than 80% of the vote. The Parti Démocratique Sénégalais (Democratic Senegalese Party, PDS) became the main opposition party for the next 20 years. Senghor stepped down voluntarily in 1980. The Senegalese party system was fully liberalized in 1981, which led to numerous subsequent party foundings and regroupings. In the late 1990s, debates about necessary economic reforms and personal rivalries over the control of increasingly scarce resources led to increasing fragmentation within the PS.

The macroeconomic situation deteriorated in the early 1990s. After a 50% devaluation of the regional currency, the CFA franc, in 1994, the macroeconomic situation improved, but the living conditions of the average Senegalese worsened. Between 2000 and 2008, annual growth rates were

around 5%, but this was not enough to meet the needs of a growing and increasingly urban population in terms of income, food security, health and education. In 2001, Senegal was hence reclassified as a least developed country (LDC). Since 2009, economic growth has gone down significantly, averaging approximately 3%. Life for many Senegalese has become particularly difficult in times of high oil and food prices, as Senegal is highly dependent on energy and other imports. Still, according to the World Bank, the rate of poverty sank from 55.2% to 46.7% between 2001 and 2011.

Long-time opposition leader Abdoulaye Wade (PDS) won the presidential election of March 2000, in part because of the support of former PS faction leaders. Wade went through six prime ministers during his twelve years as president. His potentially dangerous challenger Seck was replaced by Macky Sall, who in turn was replaced three years later. Sall was publicly humiliated, dismissed as president of the National Assembly and as the PDS's deputy secretary-general and narrowly escaped judicial accusations of corruption. In 2008, he founded his own political party, the Alliance pour la République (Alliance for the Republic, APR), which then became part of a vast alliance, the "Benno Siggil Senegal," organized in opposition to the PDS and Wade's intentions of setting up his son, Karim Wade, as his successor. Following Wade's re-election in 2007, the political climate in Senegal soured and political conflict became more pronounced. In 2009, after heavy losses in the municipal elections, President Wade announced his candidacy for the 2012 presidential elections, defying a constitutional limit of two terms (the Constitutional Council, however, validated his candidacy in a controversial judgement). In 2011, the various opposition forces unified. Following a particularly tense electoral run-up to the first round of elections, which featured violent riots, Macky Sall and Abdoulaye Wade reached the second ballot. The twelve opposition candidates from the first round supported Macky Sall against Wade in the runoff election. Sall won the elections by a vast majority and Wade immediately accepted his defeat.

Macky Sall came into office at the beginning of April 2012. He formed his first government, taking into consideration all relevant forces of the vast alliance against Wade, including citizen movements and groups. Since this peaceful change of power, Senegal has restored its reputation as a model case for democracy and the respect of a constitutional framework. The elections for the National Assembly in 2012 resulted in an even clearer defeat of Wade's party, the PDS.

Currently, Macky Sall's government enjoys international political and financial support. In February 2014, Sall presented his development program, the Plan Sénégal Emergent (PSE), at the donor countries' Advisory Group in Paris and received considerably more financial support than required. Senegal's current positive international reputation and position notwithstanding, the real test for Sall's presidency is the capacity of his government to solve the country's economic and social problems, namely unemployment and the high cost of living. In the face of mounting public dissatisfaction over the rising cost of housing, in the spring of 2014 the government intervened to implement an across-the-board reduction of rents. Many other reforms, including those of the country's political structures, are underway. However, much remains far from completion.

The local elections in June 2014 were a highly anticipated first test of the governing coalition's popularity. It suffered heavy losses in parts of the country. Aminata Touré, the prime minister, lost her race and was replaced by the technocrat and long-time associate of President Sall, Mahammed Dionne.

The governing coalition is fractured and there is discussion among the parties collaborating with Macky Sall's APR about running candidates of their own in the next presidential election.

The BTI combines text analysis and numerical assessments. The score for each question is provided below its respective title. The scale ranges from 1 (worst) to 10 (best).

Transformation Status

I. Political Transformation

1 | Stateness

Question
Score

The Senegalese state largely maintains its monopoly on the use of force. However, in the southern province of Casamance – located south of the neighboring English-speaking country of Gambia – the separatist Mouvement des Forces Démocratiques de la Casamance (MFDC) has been fighting for independence since 1982. For many years, the region has suffered from violent clashes and very poor public and private infrastructure. Villagers in some areas have left their homes and relocated to Dakar and other urban areas as well as to Guinea-Bissau in the south due to fighting and harassment on both sides of the conflict.

Monopoly on the
use of force

7

An armistice agreed to in 2004 has never really been respected and violence has increased again since 2010, along with a spillover of banditry and drug trafficking. Senegal's neighbors Gambia and Guinea-Bissau have always played a role by offering safe haven for retreat. In addition, the Gambian dictator Yaya Djammeh is considered to have rearmed the separatist guerillas. In 2012, a new round of mediation began. The government accepted mediation by the Italian Sant'Egidio association in Rome, a catholic laymen's organization. The talks are supported by the Vatican and several European countries. The association, however, has so far only reached one of the four rebel factions. Other Senegalese organizations, some of which have a mandate from the government, are undertaking efforts to reach out to the rebels. The leader of the military arm of the MFDC, Salif Sadio, announced a unilateral ceasefire in April of 2014. In this unclear situation between war and peace, the government has begun to build up the infrastructure of Casamance, the agricultural potential of which has so far been underdeveloped.

State control has been traditionally limited in Touba, the seat of the Mourides, one of the two major Muslim brotherhoods. Brotherhoods and the marabouts who created them constitute a link between Islam and older traditions and practices. Touba has its own militias to secure the peace and enjoys an (informal) autonomous status. Recently, the reach of the Senegalese state has diminished further: there are no longer

French-speaking schools and private Shariah police are now active. The 2010 law providing for gender-balanced electoral slates was not implemented in Touba, because the leader of the Mourides, the Khalif, did not accept it. There was little protest and the election lists were not cancelled even though they were illegal. Cities of importance for other brotherhoods, such as Kaolack, Ndiassane and Tivaoune for the Tidjane brotherhood, have not requested a similar status.

Senegal's state structures are modeled on the French colonial experience which dates back to the mid-nineteenth century. The country is proud of its status as the former seat of government of French West Africa and of the long-term political linkages of the "four communes" (i.e., Dakar, Rufisque, St. Louis and Gorée) to France. These entities were considered integral parts of France and, under certain conditions, its citizens were eligible to vote for and be elected to the French National Assembly. Among the French-speaking countries in West Africa, Senegal was most influenced by France. Only the southern region of Casamance came relatively late under French colonial rule, after a period under Portuguese control. Senegal's first President Senghor successfully laid the foundation for a Senegalese identity which extended to most of the former colonial territory. Senghor was a member of both a religious and ethnic minority (a Catholic Serer), which assuaged the fears of smaller groups that they would be dominated by the largest group, the predominantly Muslim Wolof, who account for more than 40% of the Senegalese population. Interethnic tensions are not completely absent, but these tensions are unrelated to the question of who qualifies as a Senegalese citizen.

State identity

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Senegal is 95% Muslim. Clerics, whether Muslim or Catholic, are accorded high moral authority. Moral convictions and political decisions – for instance, on homosexuality or abortion – are closely related to religious faith and tradition; it would be a "political suicide" to contradict these dogmas.

No interference of religious dogmas

6

While former President Senghor, a Catholic, successfully limited the role of religious faith in politics and enforced the principle of "laïcité," the notion of a secular state, Senegalese politics has always had very close links to religious leaders. For instance, they have always relied on the various Muslim brotherhoods when reaching out to the rural areas. In order to maintain these links and to obtain the support of the marabouts during electoral campaigns, the Senegalese state offers privileges and financial aid to the brotherhoods, especially to the Mourides. Thus, despite the constitutional separation of religion and state, the brotherhoods exert political influence that, to some extent, limits the legal provisions of "laïcité."

The major brotherhoods today largely refrain from giving open endorsements, in contrast to the first decades of the Senegalese republic. Still, politicians openly demonstrate their links to the brotherhoods and their leaders. For example, President Wade, rhetorically a strong defender of laicism, did not hesitate to show his

submission to the leader of the Mourides. President Sall also belongs to the Mourides, although there is no hard evidence that this has been politically relevant.

The influence of conservative Muslim groups has become stronger in recent years, partially because of external influence from Wahabite preachers whose religious thinking hails from Saudi Arabia and other Arab countries. For example, the movement Ibadou Rahmane, which has many followers among youth, criticizes the brotherhoods and especially the intermediary role of their marabouts. During Wade's presidency, reform legislation on family and matrimony did not succeed due to the resistance of conservative religious groups. At the same time, however, the most conservative groups did not succeed in introducing a new Shariah-based family law for the Muslim part of the population, which confirms the still quite secular character of the state.

State administration extends to the whole country, with the exception of Touba, although less so in rural areas far from the capital. Health and education facilities (as well as other public services such as access to drinking water) are quite dense in the coastal areas and become scarce the further east one goes. The functioning of the administration is at times deficient due to a lack of adequate (human) resources and increasingly poor infrastructure. Officeholders' lack of accountability has created additional problems.

Basic
administration
6

During the past years, decentralization efforts have advanced. The decentralization process, which began in 1996, and the transfer of certain responsibilities to the local authorities have, however, not improved the delivery of services to the population in rural areas. In general, the transfer of responsibilities has not entailed the transfer of the necessary budgets to implement effective policies. Also, there is still a lack of competence and training at the local level. A December 2013 reform law, "Acte III," was designed to further decentralize public administration and strengthen local authorities and departments, but has met with increasing criticism and is in the process of being redesigned. Currently, several cities including the capital of Dakar are refusing to pass their annual budgets.

Social services are still very limited. In addition, their delivery has not been guaranteed countrywide and to all segments of the population. In recent years, educational and health care services have suffered heavily from neglect, poor administration and a lack of financial resources, despite promises from the government that these services would be improved.

2 | Political Participation

Elections in Senegal have long been considered largely free and fair. After a period of concern because of President Wade's apparent dynastic aspirations, Senegal's democratic prospects were again confirmed in 2012. In March 2012, voters elected Macky Sall president for a seven-year term in an election deemed largely free and fair by domestic and international observers. According to the U.S. State Department, there were isolated reports of minor irregularities, such as insufficient equipment or late openings at some polling stations. In July 2012, Sall's Benno Bokk Yakaar coalition also won the majority of seats in National Assembly elections. These elections were also considered free and fair by international observers. According to U.S. sources, the 150 political parties registered at that time generally operated without restriction and outside interference. In early 2012, however, the Constitutional Council had barred three candidates from running in the presidential election for not collecting the 10,000 signatures legally required.

Free and fair
elections

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Allegations against the correctness of the electoral register were frequent. Since 2005, Senegal has had a permanent electoral commission, CENA, the members of which are nominated by the president. While there are occasional protests against his nominations, other countries in the region are trying to emulate Senegal's example by establishing their own permanent electoral institutions.

Since 2009, Senegalese politics have been dominated by a quasi-continuous electoral campaign. Presidential and parliamentary elections followed in 2012 and local elections in 2014, the latter also largely considered free and fair. Singular instances of violence did occur in the run-up and some irregularities had to be resolved in court. In his presidential campaign, Macky Sall had promised to shorten the term of the president from seven to five years and has finally announced a 2016 referendum on this question. If the measure passes, the permanent campaign will continue until the next presidential election in 2017.

The political system of Senegal, which is based on the French model, concentrates a great deal of power in the presidency. There are no strong veto powers, neither in the National Assembly nor in the courts. Officeholders are highly subordinate to the president, and prime ministers and ministers have frequently been replaced. Due to the president's dominant role, issues beyond his focus cannot be expected to be carried out in a timely manner and according to appropriate processes. Administrative capacities are also limited when it comes to implementing legal rules.

Effective power to
govern

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In February 2014, CNRI, a commission expressly established by the president, presented its proposals for institutional reform. Since then, the proposed strengthening of the prime minister and of parliament has received much public discussion. These fundamental changes would, however, require a new constitution

and there is no political support for this so far. Incremental change is thus more likely. As a first measure of institutional reform, Macky Sall abolished the second chamber of the National Assembly – the Senate (Sénat) – in 2012.

The army is apolitical, and army officers are well-trained, well-paid and loyal to the civilian command. The Senegalese government also accepts offers to engage the military in international peacekeeping missions throughout Africa, which brings attractive revenue.

Religious groups come nearest to having veto powers. They are especially listened to when it comes to matters of public morality. Today, however, the main Muslim brotherhoods refrain from intervening directly in politics and from issuing endorsements. Small groups attempt to intervene but their support in political elections does not determine political outcomes. As described above, the “holy city” of Touba constitutes a special case, but the most recent khalifs have been rather discreet on national political matters, preferring to focus on moral questions. President Sall even gave a strong signal that the times of impunity for religious leaders were over after his election in 2012. Authorities started investigating popular Mouride leader Cheikh Bethio Thioune for his alleged involvement in a murder and his detention continued even after his followers staged violent protests. However, the fact that Touba ignored the law proscribing gender-balanced electoral slates without any consequences shows the continued power of the Mourides brotherhood. This power might even be growing, as politicians and the media are careful not to voice criticism of the brotherhoods and the marabouts. After Moustapha Cissé Lô, a vice-president of parliament, criticized the khalif in private in the summer of 2014, several of his houses were burnt down and his family was threatened, without any consequences for the perpetrators.

Corruption among state administrators and high-level military officers became widespread under Wade, but the Sall government has taken some strong symbolic action against corruption and bad governance, and the situation has slightly improved.

The right to assemble and to organize peaceful demonstrations is constitutionally guaranteed. During Wade’s last years in power, these rights were frequently abridged, especially during the presidential campaign of 2012, when the opposition movement M23 was demonstrating on a daily basis. Practices of arbitrary arrests, detaining peaceful activists and using excessive force have largely come to an end with the new government. Senegalese civil society covers a wide range of interests and groups. Political parties can form freely, even though some face a long waiting period in terms of their registration. The plethora of civil society groups is often linked to funding opportunities provided by political alliances, migrant networks and international donors. Nevertheless, some of the Senegalese NGOs, including human rights networks and citizens groups defending civil rights and good governance, are among

Association /
assembly rights

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the most vocal and active in West Africa. For the most part, they can assemble freely, with the notable exception of LGBT groups and HIV/AIDS support groups active in the gay community.

Freedom of expression is traditionally guaranteed and respected. Print media and radio stations are numerous and represent diverse interests and opinions. After the opposition boycotted the parliamentary elections in 2007 and the National Assembly no longer offered a platform for criticism of the government, political magazines and some of the daily newspapers stepped in. The National Assembly has not recovered its role as a forum for debate. Since the first transfer of power to President Wade in 2000, private media (newspapers, radio and TV stations, and digital media) have freely covered the electoral process and have played a significant role in communicating polling station results. However, an increasing number of media belong to, or are very close to, individual politicians, clearly impeding their neutrality.

Members of the media have in some cases been prosecuted for allegedly spreading misinformation and engaging in defamation. Yet thanks to broad support by leading forces in civil society, press institutions continue to function as a platform for information on the corruption of officeholders and reporting on government mistakes and weaknesses. The overall situation of the media improved considerably since Sall's election in 2012 and, consequently, Freedom House upgraded Senegal's rating considerably. In the Global Press Freedom Index of 2014, Senegal is now considered "partly free."

Yet, while legal protections for journalists are better enforced and there are fewer legal cases against the press, legislation to reform the regulation of the media, the Code de la Presse, has been blocked in the National Assembly since 2010, largely because of skepticism concerning the planned decriminalization of journalists' activities. The strict media laws that exist have at times led media sources to be extremely cautious when covering issues involving major officeholders and religious leaders. Although this might to some degree foster self-censorship, there are no systematic limitations on reporting, and the media are outspoken and critical when it comes to unveiling major political scandals, though critiques of religious leaders are much less common.

The terrorist attacks on the office of the French journal Charlie Hebdo in January 2015 and the subsequent debate regarding freedom of expression, namely caricatures involving Islam and the prophet Mohammed, showed the possibilities and limitations of Senegalese reporting and political participation. The debate also showed the perception gap that exists between secular Western countries and countries, such as Senegal, where a majority of the population is deeply religious. Public demonstrations organized by various civil society and religious groups remained largely peaceful, only some involved instances of violence and the destruction of

Freedom of
expression
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property. In the media, President Sall was both attacked and defended for his participation in the Paris solidarity march. His defenders highlighted his condemnation of terrorist violence and downplayed the role of freedom of expression. In Senegal, the distribution of the magazine Charlie Hebdo was outlawed and the government announced it would open international mail to prevent its importation.

3 | Rule of Law

While incoming President Sall widely abolished Wade's parallel structure of ministerial decision-making under the control of the president and his entourage, giving more power to the prime minister, on the basis of the French model, the balance of power remains in favor of the president and his office. The legislative branch continues to be weak, as does the opposition, led by a fractured PDS. Thus, although a system of checks and balances is constitutionally provided for, it does not function properly. A political willingness of the executive to encourage the separation of powers exists, but in practice, neither the National Assembly nor the judiciary balances the executive.

Separation of
powers

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The Senegalese judiciary is also built on the French model. Its professional reputation is relatively good. It does not, however, function completely independently, particularly in cases investigating the political system or involving large economic interests. The independence of the judiciary has been questioned, as the government makes appointments (e.g., the members of the Supreme Court). Often, pretrial detentions are extended arbitrarily. Corruption remains a problem. In addition, complicated, long and expensive procedures often lead the courts to defer decisions to traditional means of conflict resolution, particularly – but not exclusively – in more remote rural areas. Especially poor Senegalese often revert to traditional forms of settling civilian disputes because of deficiencies in the legal system as well as for cultural reasons.

Independent
judiciary

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The new government has reactivated a special court, CREI (Cour de répression contre l'enrichissement illicite), designed to fight illegal enrichment and corruption in government. Corrupt officeholders at the lower levels of administration rarely attract public attention and petty corruption is a fact of daily life. Until 2012, charges of corruption were often filed against political rivals, which led the public to strongly suspect that political motives were at play. Since 2012, leading personalities of Wade's administration have been investigated for corruption and illegal enrichment (fewer, however, than the special state attorney had wanted; he was dismissed after trying to extend his probe to the PDS leadership).

Prosecution of
office abuse

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The investigations and trials are meant to fulfill the public's desire to see the previous government's widespread corruption punished, but they have been controversial. Most prominently, former President Wade's son Karim has been imprisoned since

March 2013. The trial against him began in late 2014. He was first accused of embezzling one billion euro during his tenure as “super minister,” now the charges are concerning €178 million. Karim Wade considers himself a political martyr who is subject to a political show trial. While the trial is an important symbol in the fight against government corruption, the reversal of the burden of proof – Karim Wade has to demonstrate the legality of his wealth – has rendered inoperative principles of the rule of law. Only time will tell if these efforts will deter further embezzlement of government funds.

The Sall government, with the support of the African Union, also established a special court – the Extraordinary African Chambers – formed by judges from Senegal and other African nations, to deal specifically with the human rights abuse accusations against the former dictator of Chad, Hissène Habré, who has lived in Dakar for over twenty years. In June 2013, Habré was imprisoned and in July 2013, he was formally indicted.

Civil rights are generally respected in Senegal. The violation of civil rights is legally subject to criminal punishment, including practices such as female circumcision, which remains especially widespread in rural areas. Moreover, reported abuses by state agents are frequently not investigated and remain unpunished, as was the case for past human rights violations in the conflict-ridden region of Casamance. In the context of violent clashes in the summer of 2014 between university students in Dakar and the police, one student was killed by the police. Two officers were subsequently arrested. Equality before the law, equal access to justice and due process under the rule of law are enshrined in national legislation. In practice, however, these rights suffer from social, economic and cultural restrictions, for example, the perception that homosexuality is “un-Islamic” or “against god’s will” (as the Catholic minority shares the prejudice). Homosexuals’ civil rights are limited; they are denied the right to officially organize and may be subjected to legal prosecution.

Senegal has ratified the United Nations Convention on the Rights of the Child, but child labor is still common and there are more than 50,000 children begging as so-called “talibés” (Koran learners) in the streets according to a 2010 estimation by Human Rights Watch. Traditionally, boys are frequently put into the custody of a Koran teacher where they are often exposed to violence and misery.

Civil rights

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4 | Stability of Democratic Institutions

Democratic institutions have existed in Senegal for a long time, but there are several obstacles to their good performance. First, at least since the opposition's boycott of the 2007 parliamentary elections, the National Assembly has stopped serving as the key forum for political debate. While reform proposals have been under discussion, it still has to regain its institutional role. Fortunately, the media and civil society associations play an active role in spurring public debate. Second, while decentralized government institutions, from the regional to the community level (conseils départementaux, communalisation universelle/intégrale), have been strengthened recently, they still lack competence as well as sufficient financial resources. Third, on the level of the nation state, fiscal mismanagement limits the government's effectiveness when it comes to planning and implementing activities. Opposition parties, civil society and interest groups criticize the deteriorating functioning of democratic institutions.

Performance of democratic institutions

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In general, the country's democratic institutions are respected by all relevant actors. The last national elections in 2012 confirmed the credibility of Senegal's democratic institutions and enhanced the overall commitment to the democratic process. There is no substantial exercise of political power by actors other than elected leaders. Religious leaders generally respect the predominance of state institutions and the democratic process, as do the military and civic associations. When former President Wade returned to Senegal from France in 2014, he claimed in an interview with *Jeune Afrique* that he could overthrow Macky Sall with a simple call to his followers to take to the streets; this, however, has been considered an empty threat.

Commitment to democratic institutions

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5 | Political and Social Integration

Since President Wade came into power in 2000, the Senegalese party system has been characterized by high fragmentation and volatility at the fringes. There are no profound ideological differences between parties, hence, disputes about party platforms are not the focus of political debate. Rather, personal disputes often lead parties to break apart. Splits from the ruling Socialist Party (PS), for example, were to a certain degree responsible for the political changes in Senegal in the 1990s.

Party system

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Since its electoral defeat in 2012, Wade's Parti Démocratique Sénégalais (Democratic Senegalese Party, PDS) has suffered from similar splits and a lack of political leadership. Some of the former PDS leaders dismissed by Wade, such as Macky Sall and Idrissa Seck, have formed new political parties under their personal leadership.

Apart from the PDS and its spin-off, the Convergence Démocratique Bokk Guiss Guiss, there is no significant opposition at the moment, as all the main opposition parties to former President Wade have built an alliance around Macky Sall. There is a tendency to flock to the center of power, the presidency, but so far, only Idrissa Seck, former prime minister and former leading PDS member, has taken his newly formed Rewmi party out of the governing coalition. Given this situation, the PDS is currently not able to offer a strong opposition. However, new leadership might change this. There is some discussion of an alliance among various liberal parties (i.e., the PDS and the various splinter parties) – of course with the exception of Sall's Alliance for the Republic (APR), which attracted many former followers of the PDS.

In most cases, political parties do not have specific social roots within society. Senegal has a multitude of political parties (currently 256) most of which are insignificant, have almost no programmatic foundation and are nothing more than electoral movements around a leading personality. The plethora of new parties is exacerbated by an electoral system which allows for coalitions of parties to compete for 60 of the 150 seats in the National Assembly. At the level of national politics, there are at the moment only three political parties with a nationwide organizational infrastructure: the PDS of former President Wade, the PS and the APR of President Sall. Other political parties do not play any significant role and their existence contributes to the weakening and discrediting of political parties within the political system of Senegal. While there is a constitutional ban on religious parties, small de facto-Islamic parties (who circumvent the ban) are represented in the National Assembly (holding nine out of the 150 seats). This might be an augury of rising religious influence in national politics.

After losses in the local elections of June 2014, President Sall used the opportunity to reshuffle the cabinet – the prime minister and six ministers who had lost their local races (as in France, multiple offices are common, however, ministers cannot be members of the National Assembly) were replaced. The losses suffered by the parties supporting the government can partly be explained by a proliferation of competing lists. Occasionally, candidates from the governing coalitions competed against each other as part of different lists. Dakar's popular mayor, Khalifa Sall (PS), was re-elected and is therefore considered one of main challengers of Macky Sall in 2017 (or 2019). Secretary General of the PS, however, remains Ousmane Tanor Dieng.

The network of interest groups is relatively small and concentrated in urban areas (where more than 40% of the population resides), and these networks are especially concentrated in greater Dakar. Rural representation has been more difficult to achieve and often rely on personal connections with political leaders. However, as decentralization efforts have recently strengthened the position of administrations and local politicians in rural areas, this might change.

Interest groups

5

As it is generally difficult to organize activity around issues rather than personalities in Senegal, interest groups generally do not play the role of mediator between private and public interests. In contrast, international interests have been able to use their leverage to pressure decision-makers. In general, associational life is rich by the standards of sub-Saharan Africa, for example, there are many very active NGOs.

The Senegalese trade unions are organized along the lines of the French model, which has led to substantial political and organizational fragmentation. Yet though they are quite active, their real impact remains rather insignificant as they organize only a fraction of the working population. One reason for this is that the formal sector of the Senegalese economy, where unions are traditionally strong, is very small. The Senegalese unions have only just begun to be active in the large informal sector (which accounts for 97% of the economy). Trade union leaders have occasionally played an important role in moments of national crisis, such as during the electoral campaign against Wade in 2012. There is some discussion of greater organizational unity among trade unions, which would increase their influence.

The outcome of the 2012 elections and the peaceful handover of power to newly elected President Macky Sall has considerably reinforced the acceptance of democratic procedures. The last round of Afrobarometer surveys in 2013 showed strong support for democratic institutions and a high degree of consent to democratic norms and procedures (87%). In addition, 89% of all respondents agreed that voting in elections is entirely free, almost three quarters (73%) believed that one can express opinions freely, 87% preferred democracy to any other kind of form of government and 67% thought that Senegal is a proper democracy or a democracy with minor flaws. Another 24% saw major flaws, but only 3% responded that Senegal is no democracy at all.

Approval of
democracy
9

Generally, there is a fairly high level of trust among the Senegalese, although this may not always cut evenly across ethnic and other identity lines. Self-organizations, such as savings groups (“tontines”), hometown associations and religious groups centered on a religious leader (marabout) are numerous and important for matters of self-help and solidarity within Senegalese communities. Civilian leaders not affiliated with political parties have gained support among the better-educated urban youth.

Social capital
7

II. Economic Transformation

6 | Level of Socioeconomic Development

Question
Score

Socioeconomic
barriers
2

In 2001, the UN reclassified Senegal as a least-developed country. The Human Development Index of 2013 ranks Senegal as 163rd out of 187 countries, with a HDI score that was three points lower than in 2012. Economic growth rates over the last decade hovered below 4%, averaging only 3% in the five years between 2009 and 2013 according to World Bank figures. Clearly, Senegal's socioeconomic and human development is at a very low level and recently has even slightly deteriorated. In 2014, economic growth increased to 4.5%, but there has been little visible success in terms of creating employment.

High population growth has exacerbated poverty and social inequality. Urbanization, at a rate of 47.5%, continues to be a major trend. Migration from rural areas to the capital city of Dakar, where nearly a quarter of the country's population is concentrated, and to foreign countries has drastically increased. This migration is due to the increasing difficulty of peanut farming and to the general neglect of state infrastructure in rural areas, in particular educational and health care facilities. Poverty is endemic in rural areas. In addition, the mostly arid Sahelian area of Senegal is extremely exposed to the effects of climate change and soil deterioration, which is accelerating migration into urban centers.

Population centers are almost all located in the densely populated coastal areas, particularly in the urban conglomeration of Dakar. Yet urban centers offer little opportunity for those who migrate there. While slums and shantytowns do not exist to the extent known in other African countries, social exclusion and marginalization due to poverty are strikingly visible in urban areas. Despite some limited success stories in the service, banking, building and telecommunications sector, the formal economy is far from providing sufficient employment. In addition, the crisis within the educational system has continued. In 2014, there were strikes at schools and universities and violent clashes erupted between students and the police as a reaction to proposed reforms. The government has begun to realize that investments in vocational training are necessary, as the universities are overburdened and graduates are often not equipped to meet the demands of the economy. Nearly 50% of the adult population remains illiterate, with rates far worse among women (more than 60%).

While Senegal outperforms countries in West- and Central Africa on the gender inequality index, the low value of 0.537 (2013) indicates that gender remains a critical factor when it comes to determining access to education and life prospects.

Economic indicators		2005	2010	2013	2014
GDP	\$ M	8707.0	12932.4	14791.7	15578.9
GDP growth	%	5.6	4.3	3.5	3.9
Inflation (CPI)	%	1.7	1.2	0.7	-1.1
Unemployment	%	10.1	10.2	10.3	-
Foreign direct investment	% of GDP	1.9	2.1	2.0	-
Export growth	%	2.0	2.6	14.6	1.4
Import growth	%	11.1	-5.9	23.0	-0.1
Current account balance	\$ M	-675.9	-589.1	-	-
Public debt	% of GDP	45.7	35.5	46.6	53.1
External debt	\$ M	3861.7	3908.4	5222.8	-
Total debt service	\$ M	203.5	304.7	400.7	-
Cash surplus or deficit	% of GDP	-	-5.2	-	-
Tax revenue	% of GDP	-	18.7	-	-
Government consumption	% of GDP	13.3	14.7	15.5	15.6
Public expnd. on education	% of GDP	5.1	5.6	-	-
Public expnd. on health	% of GDP	3.0	2.4	2.2	-
R&D expenditure	% of GDP	-	0.54	-	-
Military expenditure	% of GDP	1.4	1.5	1.6	1.5

Sources (as of October 2015): The World Bank, World Development Indicators 2015 | International Monetary Fund (IMF), World Economic Outlook, October 2015 | Stockholm International Peace Research Institute (SIPRI), Military Expenditure Database 2015.

7 | Organization of the Market and Competition

While the institutional framework for a market economy is quite rudimentary in Senegal, economic freedom is largely guaranteed. The freedom to set up a business is legally provided for, but hampered by poorly functioning public institutions and corruption, which is one of the reasons why the informal sector creates far more jobs than the formal economy and has become key to the survival of most Senegalese. Rules are not uniformly applied, which creates insecurity for market actors. In the Heritage Foundation's Index of Economic Freedom 2014, Senegal ranks 125th out

Market-based
competition
4

of 179 countries and 23rd out of 46 countries in sub-Saharan Africa, losing some ground. The new government has started a number of initiatives to improve public procurement processes and budget transparency as well as to reduce corruption (e.g., by pushing for disclosure of the personal economic situation of anyone in government responsible for more than one billion CFA franc).

Given the small size of the formal Senegalese economy, monopolies and quasi-monopolies are easily established, though they are not actively fostered by the state. A large number of state monopolies (e.g., peanut marketing) have been broken up over the last decade. This has not necessarily resulted in improvements for producers or consumers though, as market regulation and oversight remain insufficient. Reforms are underway but problems persist, in part because of difficulties in finding investors in some sectors, especially in the case of the notoriously loss-making electricity company and the energy sector in general. In order to help the problematic energy sector recover, Macky Sall's economic development plan PSE (Plan Sénégal Emergent) envisions reductions in energy production costs, increases in capacity, improved stability of supply and lower prices, but currently customers complain about arbitrary invoicing.

Anti-monopoly
policy

6

The opening of Senegal to external trade is relatively advanced. A number of decisions (e.g., those regarding tariff reductions) are made by the West African Economic and Monetary Union (WAEMU) and are increasingly discussed within the larger Economic Community of West African States (ECOWAS) region. During the negotiations of a regional economic partnership agreement (EPA, a free trade and development agreement) between ECOWAS and the European Union, Senegal, as a Sahelian country without natural resources, strongly opposed EU conditions. It is strongly feared that market openings will result in a moderate loss of state revenue and damage the vulnerable agricultural sector, since domestic agricultural products will not be competitive against the highly subsidized European products. Still, the EPA was concluded in July 2014, providing for a phase-in period of 20 years for the 75% reduction in tariffs. The EU has signed the EPA, which now awaits ratification in at least ten of the ECOWAS countries. In the face of growing public and civil society skepticism, the Senegalese National Assembly has not yet scheduled a vote.

Liberalization of
foreign trade

6

Senegal is trying to diversify its economic and trade partnerships. The country recently concluded trade agreements with China, for example. China has risen to be the country's second most important commercial partner. On the micro level, small businesses continue to suffer from administrative impediments and corruption.

The banking sector is diversified and operates stably under the auspices of a strong supranational regional bank (i.e., the Central Bank of West African States, BCEAO). Foreign banks dominate the banking system. As the sector is largely detached from global financial flows, the global financial crisis has not had significant direct effect on the Senegalese market. Access to small loans remains a problem, particularly for small entrepreneurs. The microfinance sector has developed during the past decade. According to the World Development Indicators, non-performing loans comprised 20.6% of debt in 2013, while 18.4% of all loans were non-performing in 2012.

Banking system
6

8 | Currency and Price Stability

Currency policy is determined by the supranational BCEAO and characterized by prudent policies. The West African CFA franc is guaranteed by the French treasury and thus pegged to the euro. Inflation rates have traditionally been very moderate, and they have usually met euro stability pact criteria. Inflation increased to 3.4% in 2011 due to steep increases in energy and food costs, but recently Senegal, an oil importing country, has profited from lower energy costs and inflation in 2013 was down to 0.7%. In order to defend itself against social unrest, the Wade government began to subsidize food and other basic commodity prices at the end of 2010 and also heavily subsidized the electricity supply. These ongoing subsidies put additional stress on the tight national budget, despite foreign financial support. In the spring of 2014, the Sall government legislatively lowered rents across the board and later lowered hydrocarbon prices in December 2014.

Anti-inflation /
forex policy
8

The public debt fell from 3.6% in 2012 to 2.7% in 2013. By and large, public debt has not risen for a long period. The Senegalese state has made real efforts to settle internal debts and this enabled the country to avert an acute financial crisis. The extra-budgetary spending of the Senegalese government under President Wade has come to an end and the Sall government has enjoyed goodwill from international donors because of its reform agenda. External debt has risen constantly over the years. As Senegal is heavily dependent on aid, international monitoring institutions maintain their control in order to ensure that Senegal complies with international rules.

Macrostability
7

9 | Private Property

Property rights are guaranteed and usually respected in urban areas. Recently, Senegal has made it easier to transfer property by eliminating the required authorization from the tax authority. In rural areas, however, property rights quite often are not protected. Here, land registration procedures are unsecure and slow. The administration of property title and land registration procedures is uneven outside of urban areas, as land titles in rural areas are still based on traditional rules, and the legal defense of property rights is unsatisfactory due to shortcomings in the judiciary.

Property rights
7

Since Senegal lacks commercial courts staffed by trained judges, decisions can be arbitrary and inconsistent. Regarding intellectual property rights, enforcement is weak to nonexistent despite an adequate legal and regulatory framework.

Private small enterprises in the informal subsistence economy and in peanut farming are the backbone of the economy. Agricultural property in rural areas is still dominated by the inherited traditional and colonial systems leading to a prevalence of small individual farms, which has hindered the modernization of agriculture (although there are also positive aspects to this, such as a diversification of agricultural production). Under these conditions, the partial dissolution and neglect of the state's peanut-marketing mechanisms have heavily contributed to the disintegration of Senegal's key agricultural sector and the loss of livelihoods for many in rural communities.

In theory, the state tries to encourage private enterprise through its strategy for accelerated growth (SCA), but its output has been rather poor. The official commitment to develop private enterprise is high, but in practice, Senegal's macroeconomic reality does not encourage significant private investment, with the exception of the real estate and construction sectors. This is partly due to infrastructural problems (electricity, water, roads), but also to the slowness of public administration and corruption, which discourages many private investors. It remains to be seen whether the new PSE (Plan Sénégal Emergent) can significantly improve the situation. In the World Bank's Doing Business Report for 2015, Senegal was explicitly commended for current reforms and reform projects and, ranking 161st out of 185 countries, was listed as one of ten countries which improved the most.

Former public companies such as Sonatel have been mostly privatized during the last decade and larger companies are now open to foreign investment. Still, the scarcity of capital in Senegal leads to a high dependency on very limited foreign direct investment (FDI). The resulting problems, most notably regarding electricity and water infrastructure, negatively affect many small businesses even though improvements in the energy supply through the state's emergency intervention have been made.

10 | Welfare Regime

The welfare regime is basic and covers only employees in the formal sector, thus the vast majority of Senegalese are not covered. As a result, most people have no health care or pension coverage. In 2013, the government introduced basic health care protection for employees in the informal sector, the Couverture Maladie Universelle (CMU), which is designed to cover up to 95% of the Senegalese population by 2017. The program is modeled after the Brazilian Bolsa Familia program and includes conditions (the registration, schooling, and vaccination of children). The program is

Private enterprise
7

Social safety nets
4

still being developed and suffers from funding problems. The same is true of a program for a minimum pension for people without any other old age protection, Minimum Vieillesse.

In the absence of social welfare programs, extended family networks serve as the only viable safety nets. In this context, international migration is widespread and remittances are a livelihood strategy for many families. At the same time, the massive social pressure on more financially successful family members creates difficult conditions for individual economic advancement and personal development. Family social networks suffer from this stress and, therefore, their traditional supporting role is threatened.

The absence of a state welfare system leaves space for a religiously funded welfare substitute, either by the traditional Senegalese Muslim brotherhoods or funded by Wahhabi movements in the Arabic peninsula. These are often combined with religious influence and therefore slowly altering the face of traditional open-minded and tolerant Senegalese Islam.

Women are de jure equal to men, with a few exceptions in family legislation (e.g., no authority over children without written consent from the husband). In urban areas, gender equality has improved considerably in recent years. A provision on gender equality was introduced into the constitution in December 2007 but very controversially discussed in public sphere. While so far largely symbolic, the rate of female police officers, for example, has increased. In 2010, the low rate of women in parliament and assemblies triggered a 50% quota system concerning party slates for elections that was successfully tested during the 2012 elections for the National Assembly and the 2014 local elections, except for in Touba, where the khalif of the Mourides brotherhood resisted implementation. Traditional and cultural restraints on women's options persist, though, and illiteracy among women remains high at 66.3%, versus less than 40.4% among men.

Religious and ethnic groups are not treated in a systematically different manner. Muslim brotherhoods like the Mourides offer social and economic promotion through their widespread networks. With homosexuality being illegal, homosexuals have to hide their sexual orientation in public.

Equal opportunity

5

11 | Economic Performance

Since 2009, economic growth rates have averaged 3%. While they decreased considerably compared to the early 2000s because of high oil prices, difficulties in agricultural production, high food prices and the effects of the political crisis, recent annual growth rates have profited from lower energy costs and were at 3% in 2012 and 4% in 2013. The poverty rate has decreased from 55.2% of the population in 2001 to 46.7% in 2011.

Normally, prices are relatively stable, except for price increases in crude oil and food prices which, of course, heavily impacts the poorest fringes of the population. The rate of inflation was at a low 0.7% in 2013. Electricity prices are heavily subsidized by the state and contribute to the fiscal deficit. However, the government hopes to bring down the deficit to 4.7% in 2015, in part because of lower energy costs. Data on employment and unemployment are not reliable because of the large informal sector, but estimates assume very high levels of unemployment and underemployment (the ILO estimates unemployment for 2013 at 10.3%).

As already noted, the Senegalese government runs persistent budget deficits. According to the IMF, the budget deficit in 2014 was 5.1%. The trade balance is continuously negative and volatile due to fluctuations in energy prices (imports) and in harvests (exports). In 2012, the trade deficit was at 18.3%.

High population growth and the effects of the struggle between separatists and the military in the fertile province of Casamance have created a dependency on imported rice and other basic food products for many years. The new government plans to create employment in agriculture and wants to increase the production of rice to achieve an independence from rice imports by 2017. Another problem are subsidized agricultural products from the European Union that float the local markets, make local products expensive (e.g., onions) and the development of local value chains difficult (e.g., milk). The government sometimes reacts with seasonal import stops (e.g., onions).

Output strength
5

12 | Sustainability

In 2012, the new government strengthened the position and capacities of the minister of environment and since then to some extent considers environmental concerns in policy-making. The country's environmental regulations are better than those of neighboring countries but their implementation remains poor. Senegal, ranking 124th out of 178 countries on the Environmental Performance Index in 2014, with a score improved by 4.91 percentage points, outperforms many other West African countries. Yet, the ministry has been unable to play a transforming role due to a lack of an adequate financial resources and the poor performance of its services.

Environmental
policy
5

International agreements have been signed providing for a national legal framework for environmental protection. The fragile environmental balance in Sahelian Senegal ensures a comparatively high level of public awareness of environmental issues, though this is still confined to a relatively small urban elite. However, there is no deeply engrained awareness among the Senegalese public for the environment or the conservation of nature. Uncontrolled garbage disposal and burning is widespread, air pollution in urban areas is a big issue, and coastal erosion as well as a drastic diminution of marine biodiversity constitute major problems. Forecasts predict longer droughts due to climate change. Given the high level of poverty in Senegal and weak economic growth, environmental concerns are often secondary to concerns about the economy. There is little governmental concern about how to raise environmental awareness in the population or provide environmental education in schools.

The government wants to promote renewable energy and is working on a national legal framework to do so, but there has not been sufficient political will to overcome entrenched interests. The main reason for developing renewable energies has not been environmental concern but rather the desire to lower Senegal's dependency on fuel imports. As such, plans for constructing a coal-fired plant were widely welcomed.

The education sector, which is based on the French system, has long been neglected. Grossly inadequate resources and administrative neglect caused deterioration, and Senegal fell below the average for sub-Saharan countries. Almost none of the ambitious goals outlined in the Dakar Action Framework of the 2000 World Education Forum have been achieved. Only the primary school enrollment rate has improved significantly to 84% in 2012. Still, the dropout rate in recent years remains high, especially for girls. Generally, huge gender disparities persist. The literacy rate for men (66.3%) is significantly higher than for women (40.4%).

Education policy /
R&D
3

The current situation is a major source of public dissatisfaction and continues to draw fire from critics in civil society, as Senegal has been traditionally renowned for its relatively good educational infrastructure and high standards. Investment in the education sector has modestly increased and is just above 5% of GNI. R&D, however,

is largely underfunded (0.54% GNI in 2010), despite a handful of centers of excellence in research, mostly in Dakar. The public school system suffers from widespread neglect. Teachers' salaries are low and payment of salaries, even in urban centers, is very often delayed. During recent years, university teachers have complained about the negative impact of conservative religious students' associations on campuses.

Strikes at schools and universities are frequent and often threaten the validation of the academic year. In general, academic years are validated at the last minute but, as the academic programs have been taught under high time pressures, student's performances can nothing but be poor. As a reaction to proposed reforms, violent clashes erupted between students and the police in 2014, resulting in the death of one student. The government has begun to realize that investments in vocational training are necessary, as the universities are overburdened and graduates are often not equipped to meet the demands of the economy.

Mack Sall had promised in his presidential campaign to make education a priority issue but so far, there have not been any results.

Transformation Management

I. Level of Difficulty

Senegal faces a large number of structural challenges. It faces very high levels of poverty with a relatively high population growth rate. With the exception of a coastal strip facing the Atlantic Ocean and the southern province Casamance, with its subtropical climate, the country is situated in the Sahel and comprised of largely arid or semi-arid climate zones. It has suffered from heavy soil deterioration and already been negatively impacted by climate change. The country has few natural resources other than phosphate and rich fishing grounds which have also seen significant deterioration over the last decades. Despite some efforts by the EU and US to contain “illegal, unreported and unregulated (IUU) fishing,” the latter are often exploited by foreign fishing vessels in disregard of international law. As a consequence, the traditional fishing fleet of Senegal has suffered tremendously and fish has become an expensive product.

Structural
constraints

7

Energy is another structural constraint. Despite recent possible offshore oil finds and the availability of sustainable energy resources (e.g., wind and solar energy), Senegal will remain dependent on oil imports for the foreseeable future. Exploiting energy resources, traditional or sustainable, requires investment, a reliable legal framework and relatively high levels of formal training, all of which Senegal lacks at the moment. In addition, Senegalese infrastructure remains largely insufficient, not only in the area of energy supply. Some efforts have been made to improve transportation infrastructure, but such capital-intensive activities face strong constraints. Efforts to take advantage of Dakar’s favorable geographic position and transform it into a regional service center have advanced, but the construction of new roads, new international airport facilities, and new container port infrastructure are not yet complete. It remains to be seen whether the Plan Sénégal Emergent (PSE) speeds up completion.

On a positive note, HIV/AIDS has only had a limited negative impact on the Senegalese population due to early education policies. The country has also so far been able to escape any negative public health effects of the current Ebola epidemic in West Africa.

By African standards, Senegalese civil society has a relatively rich tradition and history. Social engagement in urban communities has been valued since colonial times and in rural areas, community activities have likewise been highly valued in the Muslim brotherhood system. The significant NGO scene, however, remains highly focused on urban areas and is weakened by a lack of resources. As NGOs often rely substantially on international donor funding, as in all other poor Sahelian countries, their credibility in the eyes of the government and parts of the population may be undermined. Some of the civil society organizations which played a vital role in defeating President Wade in 2012 and in the subsequent peaceful change of power have been co-opted into the government of President Sall, but others have by now re-assumed the role of critic.

Civil society traditions

5

In general, there are no pronounced ethnic or religious conflicts in Senegal; however, concerns over a predominance of the Wolof ethnic group have been nurtured by some in the Dioula (Jola) group dominant in the southern region of Casamance. The Casamance problem remains difficult to resolve because it is directly linked to the neighboring countries, Guinea-Bissau and the Gambia (e.g., drugs and arms trafficking and failed or failing states). Rebel forces have acquired armaments, financed in large part by international drug trafficking, and receive support from anti-Senegalese interests in Gambia. A new initiative to find a negotiated solution was started by President Sall in 2012, involving mediation by the Italian Catholic Sant'Egidio laymen's association. While so far only one of the four factions of rebel forces has accepted the invitation to negotiate, a unilateral ceasefire by its armed wing has for now stopped the fighting, with the exception of individual incidents. The Sall government has begun to invest in Casamance infrastructure to make use of its agricultural potential. While the Gambian dictator Yaya Djammeh continues to support the rebel leader Salif Sadio, the new president of Guinea-Bissau, José Mario Vaz, has signaled a willingness to help settle the conflict.

Conflict intensity

4

While social conflicts have calmed down considerably in urban areas since the peaceful change of government in April 2012, they may start again if the government does not succeed in its reform efforts. In 2014, violent clashes between students and the police demonstrated the potential for conflict in the face of a serious crisis in the education system. The situation is exacerbated by high youth unemployment and a sense of marginalization among some groups. The spontaneous character of these protests means that they will be much harder to settle than social conflicts in the past, which were channeled by interest groups (e.g., Muslim networks in the rural areas and trade unions in urban centers).

Religious tensions between the Muslim majority and the Christian minority grew slightly under President Wade, partly because of his outspoken reliance on the Mouride brotherhood but also because of some blundering statements about

Christians. Tensions diminished though since and overall religious coexistence in Senegal is exemplary.

Demonstrations against the Charly Hebdo cover showing a caricature of the Prophet Muhammad stayed peaceful, in contrast to many other Muslim countries.

II. Management Performance

14 | Steering Capability

Senegal's political leadership is largely committed to the constitutional order and the democratic system. The government also sets strategic priorities. Poverty reduction is the central objective of Senegal's policy measures. After the political change in 2012, the national strategy for economic and social development 2013-2017 (SNDES) replaced Senegal's first poverty reduction strategy (Document de Stratégie et de Réduction de la Pauvreté) from 2002. As Senegal proved itself to be a stable country within a region riddled with deep political crises, foreign governments, donors and donor agencies have recently improved their funding commitments for the development plan PSE (Plan Sénégal Emergent).

While Sall's government is receiving goodwill for its efforts to reduce poverty levels over the long term, implementation deficits are as obvious in Senegal as elsewhere in Africa. Plans are announced, but schedules are hardly ever kept. Structural changes require determination over the long term and in a fragmented political landscape such as Senegal's, coalition-building skills are necessary to garner national support for reforms with long-term effects. Additionally, they need strong external political and financial support. In a highly aid-dependent country like Senegal, the government must shoulder the additional burden of managing expectations and sustaining support from external donors. The Sall government has improved Senegal's cooperation with donors, but its capacity for implementing reforms and policies remains weak. The government was, however, able to successfully contain the Ebola crisis.

The constitutional focus on the presidency limits institutional settings and incentives for consensus-building and compromise. The burden of policy learning is almost exclusively on one person, the president. Institutional changes have been proposed that would strengthen the National Assembly and the prime minister, but have not been carried out (with the exception of the dissolution of the Senate). However, while President Sall re-shuffled his government after losses in the local elections of 2014, this has not changed the orientation of the governing coalition toward reform. Many ministries have a Medium-Term Expenditure Framework nowadays and make efforts to evaluate their performance.

Question
Score

Prioritization
6

Implementation
7

Policy learning
6

15 | Resource Efficiency

Despite a 2014 cabinet reshuffle after the governing coalition incurred losses in local elections, the Sall government has not been hampered by personal rivalries between the president and prime minister, as had been the case in the previous government. Use of assets appears to be more efficient. Macky Sall also fulfilled his electoral promise to reduce the size of government, abolishing a multitude of parallel state structures, and also abolishing the Senate. The government is still very large, in part because of the numerous politicians of his coalition who need to be co-opted.

Efficient use of assets

6

Decentralization policy efforts have advanced in recent years. The regions as regional authorities have been abolished with the reform called “acte 3”. In principle, acte 3 has tried to speed up the decentralization process, but the regions were abolished before the new departmental bodies were implemented which caused a lot of floating and uncertainty. The future of certain institutions is uncertain (agences régionales de développement, ARD) and new institutions are implemented (economic poles of development) before their mandate is really clear.

Regarding the overall budget, resources are insufficiently monitored and are not managed as effectively and efficiently as they could be, even though some sectors already dispose of a medium-term expenditure framework. The abolition of parallel government structures, established by Wade within the president’s office, and the strengthening of the role and power of the regular portfolio ministries, should lead to more effectiveness and efficiency. The final decision in key political questions remains with the president. While his government has displayed the capacity to create a more coordinated system and to find solutions for conflicting objectives, the traditional centralization of power in the presidency hampers the resolution of basic problems.

Policy coordination

7

In recent years, audits revealed the government’s poor performance in tracking funds within the system, which raised a red flag among the donor community. Some went so far as to threaten to withhold funds and to block budget aid. Macky Sall has delivered on campaign promises regarding efforts to curb corruption and to investigate corrupt politicians from Wade’s government. A former journalist and critic of illegal enrichment and political corruption is now the Minister for Good Governance. Anti-corruption policies have been enforced. A special court has been reinvigorated to deal with illegal enrichment and corruption and is, for example, investigating Wade’s son and ex-“super minister” Karim. Recently, the political position and popularity of President Sall has suffered, in part because of reports that members of his family have been nominated to attractive posts within the government. Also, opposition politicians and critics have been accusing the government of political revenge after the reversal of the burden of proof regarding Karim Wade’s and other former government members’ or allies’ financial situation.

Anti-corruption policy

6

At the same time, Sall has disclosed his own personal financial situation, as has the president of the National Assembly, and is pushing a law that requires such disclosure from everyone in government responsible for more than one billion FCFA.

The media have proven their capability to investigate and report on these developments, and the public is watching closely. Illegal enrichment and corruption continue to be extremely unpopular among the Senegalese public. However, Senegalese public opinion, like in other African countries (but maybe to a lesser extent) tends to accept corruption and abuse of power as something “normal” among those in power.

Despite modest reforms of public procurement procedures, accountability and audit mechanisms remain weak and have raised many concerns. There are still many direct awards of tenders in spite of the existing regulation.

16 | Consensus-Building

All relevant actors in Senegal are committed to the principles of democracy and to the goal of building a successful market-based economy. In general, ideology plays less of a role in political disputes than personality. In fact, the actions of political parties often run counter to their supposed ideological platforms.

Consensus on goals
9

The general support for a market democracy is pragmatic rather than ideological. For example, when the Socialist Party was still in power, it carried out a privatization and liberalization policy under pressure from the Bretton Woods institutions. Likewise, President Wade’s nominally liberal party did not shy away from state intervention when it was deemed to be politically advantageous or necessary (as in the case of the failed privatization of the electricity company). Macky Sall’s APR, nominally a liberal party as well, is pursuing policies that could be characterized as social-democratic.

The government is clearly committed to democracy and (to a lesser extent perhaps) a market-based economy. Anti-democratic veto players do not pose a threat at present. Senegal has never experienced a military coup d’état, and the military, potentially an anti-democratic actor, continues to be firmly under civilian control. At the same time, the Muslim brotherhoods and other more conservative religious forces, while not necessarily forces for democracy, have been successfully held in check, in part by legal action. As the government struggles to provide credible solutions to the country’s major socioeconomic problems, however, the possibility remains that the military and/or Muslim forces could try to present themselves as better equipped to govern the country. While this danger is not pronounced at the moment, the ongoing crisis in neighboring Mali and the spread of extremist Islam are a threat to the stability of the whole region. New conservative Muslim organizations sponsored by gulf states are growing and might be harder to marginalize in Senegalese politics than traditional groups.

Anti-democratic
actors
8

For the most part, Senegal's political leadership prevents cleavages from widening. Senegal has a long tradition of co-opting opposition figures into the government, which has prevented the alienation of many politicians. This is, however, also a tool to keep opponents at bay and ultimately from political power – within the legal limits of an electoral democracy. In keeping with this tradition, Macky Sall's government is trying to formulate and follow an inclusive and participatory policy toward political opponents and potential challengers. So far, the governing coalition largely holds, only Idrissa Seck has formally left it. If presidential elections are held in 2017 (in case a 2016 constitutional referendum shortens the president's term to five years), it is likely that other parties of the coalition will run candidates against Macky Sall (i.e., the Parti Socialiste).

Cleavage /
conflict
management
8

In contrast to Wade, whose injudicious remarks regarding the Christian religion triggered violent youth protests in Dakar in 2009 and led to a slight deterioration of relations between Muslims (95% of the population) and Christians (4%), Sall is following a more inclusive and peaceful path. Generally, the two main religious groups peacefully coexist.

The intensity of the conflict in the Casamance region has been reduced by efforts of the Sall government to initiate preliminary peace talks.

Although the participation of civil society is still somewhat limited, since the 2012 election, the role of civil society organizations in Senegal has been strengthened. President Macky Sall has a more inclusive governance style than his predecessor and maintains strong political and personal relations with civil society leaders and representatives of the media. He is generally supportive of their activities and integrates civil society organizations and their leaders into his political framework.

Civil society
participation
7

Some serious human rights abuses have been reported during periods of the conflict in Casamance. Despite new cautious initiatives of mediation, the government has not yet taken decisive or very convincing action to reappraise the past and to clear up the crimes committed by the rebels as well as the Senegalese army. A reconciliation effort has to be undertaken as part of a future peace agreement.

Reconciliation
6

17 | International Cooperation

Senegal continues to be a reliable partner within the international community. President Sall advocates partnerships with industrialized countries in the Americas, Asia and Europe and with countries across the African continent. In November 2014, the Senegalese government successfully organized the international summit of Francophone countries. Relations with the IMF and other international donors have at times been strained due to differences in political priorities and to Senegal's questionable auditing and public procurement procedures. Under the presidency of

Effective use of
support
9

Macky Sall, these tensions have largely diminished, however. An obstacle to the success of foreign aid remains the multitude of intervening actors and the lack of coordination between them. Sall has been able to generate more international donor support for his Plan Sénégal Emergent than anticipated. Senegal's support of the French and international intervention in neighboring Mali, and generally better relations with France since Sall's inauguration, have certainly contributed to improved donor confidence. Additional funds from the EU in the field of energy have been approved but necessary reforms in Senegal have stalled. While Macky Sall was not able to secure additional funding from Germany during his state visit in 2014, his visit to the US resulted in hopes the country would benefit from the program "Power Africa," supporting energy production. His visit to China has generated substantial investment commitments from Senegal's second most important economic partner behind the EU. Senegal continues to be regarded as a regional actor that is politically important to Chinese interests in the West African region. In contrast, financial support from Arab countries, which was developed by the Wade government, faded considerably as Sall has politically moved closer to the West.

Although Senegal is generally considered a reliable partner in international politics, questions have been raised about the reliability and credibility of its economic strategy. Infrastructure projects sometimes do not proceed past the planning phase or experience long delays. While a toll-funded highway from central Dakar to Diamniadio has been opened, the completion of a new international airport on the outskirts of Dakar has been delayed for years (now projected for 2016). A new international seaport has been stalled due to problems in mobilizing foreign funds on time. President Sall has worked to improve the relationship with foreign partners. Traditionally, international links are particularly strong with France and the EU, occasional harsh political rhetoric, for example, in terms of the regional economic partnerships or French military bases in Senegal, notwithstanding (France continues to maintain one military base in Senegal). Senegal's foreign policy since 2012 has been characterized by the intensification and improvement of relations with France and the United States in the context of the political crisis in Mali and the western Sahel region. Consequently, Sall has been able to generate more than sufficient funds for his Plan Sénégal Emergent (PSE). Nonetheless, international trust in Senegal's public finances has been undermined by audit results. The reports of an audit court have so far not resulted in sufficient action.

Senegal is member of the most important regional organizations, such as the monetary union of West African states.

The instability and weaknesses in the West African region are of permanent concern in Dakar, and Senegal has maintained and even improved its position as an important anchor of stability in the region, intervening diplomatically and militarily to stabilize weak neighboring countries. When, in 2009, Guinea-Bissau's president and the head of the armed forces were killed, Senegal provided initial support. In addition,

Credibility
8

Regional
cooperation
9

Senegalese troops, who are ranked well compared to other African military forces, have regularly participated in U.N. peacekeeping missions throughout Africa and beyond. In West Africa, Macky Sall has increasingly assumed a leading role. In 2013, Senegal provided political, military and logistical support for the international military intervention in Mali. In 2014, ECOWAS named Macky Sall as head of a contact group for talks with the transition government of Burkina Faso, after President Blaise Compaoré was toppled. While Senegal does not directly participate in the mission to help countries affected by the Ebola epidemic, Dakar serves as one of the logistical centers and has opened a humanitarian air corridor toward the affected countries. Relations with Guinea have suffered somewhat after Senegal's decision to close its border after the outbreak of the epidemic in 2014. The border reopened in January 2015. Overall, Senegal claims a leadership role as one of the drivers of regional integration, for example, organizing a high-level conference on regional security in late 2014.

Strategic Outlook

Senegal is currently at a decisive point in history. After Wade's vote out of power in 2012 and the peaceful change of government, President Sall is confronted with high expectations. He promised fundamental reforms during his campaign and has initiated a phase of political, economic and social transformation. The consolidation of Senegalese democracy is, however, still incomplete. The upcoming elections, most likely in 2017, will show if this transformation is sustainable and if Senegalese democracy is sufficiently anchored.

Senegal's current positive international reputation and position notwithstanding, the real test for Sall's presidency – and thus his re-election – is the capacity of his government to solve the country's economic and social problems, namely (youth) unemployment, the high cost of living, a sustainable energy supply and the agrarian crisis. Last but not least, Senegal faces severe ecological challenges, many of which have global origins and cannot be solved on a local level. In the face of mounting public dissatisfaction over the rising cost of housing, in the spring of 2014 the government intervened to implement an across-the-board reduction of rents. Many other reforms, including those of the country's political structures, are underway. However, much is far from completion.

Observers remark that even if only a small fraction of the ambitious Plan Sénégal Emergent (PSE) can be completed, Senegal will have made considerable progress. However, the government needs to address the high expectations of the population regarding socioeconomic development in a more realistic manner.

The central challenge for the government is to find a solution to the high rate of youth unemployment. Apart from the need for higher economic growth, the educational sector requires broad structural reforms. All levels of education require attention, but special focus needs to be given to vocational training programs as university graduates have high difficulties finding work and are not trained for the economic needs of Senegal.

International partners will likely prioritize cooperation with Senegal, to reward the efforts undertaken and to demonstrate their willingness to further assist a country which is in a decisive transformative phase.

The governing coalition has begun to fracture somewhat and there is discussion among the parties partnering with President Sall's APR about running candidates of their own in the next presidential election. The local elections in the summer of 2014 showed the difficulties of the governing coalition regarding its popularity as well as their own crumbling unity. Unofficially, the electoral campaign for the presidential election, most likely in 2017, has already begun. The future will show whether the coalition will be able to continue until the end of Sall's term.

Finally, President Sall needs to reach a peace agreement with the different factions of the rebel movement in Casamance. He made the end of the conflict in Senegal's southern province a priority during his campaign in 2012. In 2017, he will need to have some proof of success.