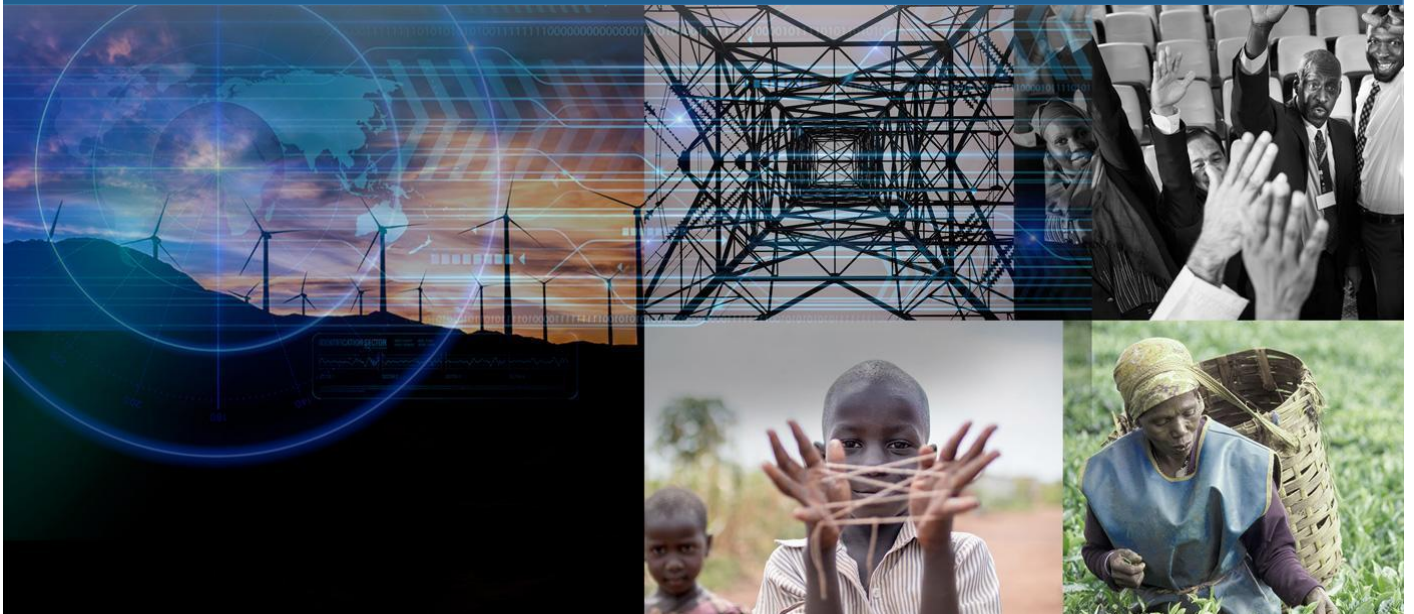


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INTRODUCTORY POLITICAL ECONOMY ANALYSIS OF THE CLIMATE PHILANTHROPY SPACE IN SENEGAL

For ClimateWorks Foundation
Prepared by Africa Practice

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1 INTRODUCTION

While Africa is not currently a significant producer of greenhouse gases (GHGs) at a global level, it has the potential to be in the future, and there is an opportunity to prevent large future emissions if the problem is addressed now. With a view to informing decision-making in this space, Africa Practice conducted a tailored, high-level political economy analysis of six countries – Kenya, Ethiopia, South Africa, Nigeria, Ghana and Senegal – to serve as an introductory resource for philanthropic organisations seeking to understand foundational climate change issues and opportunities across these countries.

The bespoke political economy analysis framework was designed to help identify and understand feasible entry points into the countries, as well as tangible opportunities for philanthropic engagement and potential partnerships. The bespoke framework developed for this analysis can be replicated and will enable philanthropy to build robust strategies for investment and engagement across the whole continent. The report below summarises our findings on Senegal.

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3 METHODOLOGY

We developed a bespoke framework of assessment, rooted in political economy analysis, but also focusing on Senegal's specificities vis-à-vis the five main structural transformations that drive emissions on the continent, namely:

- **Urbanisation**, taking into account the housing demand for 900 million more urban residents by 2050.
- **Land use changes**, with agriculture set to feed a growing population and cause up to 84% of deforestation.
- **Industrialisation**, which constitutes the backbone of many African governments' development strategies over the next decade. Across the continent, manufacturing is growing faster than anywhere else in the world.
- **Electrification**, on which industrialisation itself is heavily premised. It is estimated that 1.6 TW of power generation would be needed in Africa by 2030 and 600 million people would require access.
- **Oil and gas**, with governments balancing international pressure to adopt more rigorous environmental standards against the imperative to exploit discovered resources in order to boost energy security.

We used our consultants' deep contextual knowledge, as well as intelligence from expert sources, to inform and triangulate our **qualitative research programme**, which comprised a review of:

- **Statistics and risk indices compiled by national governments, multilateral institutions, NGOs and think tanks.** These covered: data from Senegal's national statistics office - Agence Nationale de Statistique et de la Démographie; World Bank (climate change) data and indices such as Ease of Doing Business and Governance; Yale University's Environmental Performance Index (EPI); UNEP climate change data (CDF, REDD+) and UNFCCC data; the Climate Change Performance Index (CCPI); IMF data and bilateral consultation reports; summary data from the Extractive Industries Transparency Initiative and local chapters, such as the Statistiques Hydrocarbures published by ITIE Senegal; Transparency International Corruption Perceptions Index; Mo Ibrahim Index; KPMG Africa Fiscal Guides; OECD Failed States Index; and the World Economic Forum's Global Competitiveness Report and Global Human Capital Report.
- **Other relevant grey literature.** This included, among others, recent reports by international donors, multilateral organisations, and European and North American state departments, as well as materials published by various government agencies focusing on climate change and relevant fields.
- **Media sources.** We examined open-access and subscription-based articles in English and French, related to recent and historical developments of relevance to the countries in question, both local and international.

4 EXECUTIVE SUMMARY

Historically, Senegal has been seen as a bastion of stability and democracy in a volatile region. Today, there are growing frustrations with the administration of President Macky Sall (2012-present), which pose a risk to the predictability of the country's political economy. The government's failures to address extreme poverty – and Sall's perceived sidelining of opposition figures – have fuelled an active anti-government youth movement. Tensions came to a head in March 2021 when an opposition leader's arrest sparked violent protests.

In line with recent constitutional amendments, President Sall is not permitted to run in the 2024 presidential elections. Sall is therefore directing his energy towards finding a suitable successor, while seeking to neutralise his opposition rivals. However, growing support for the opposition and succession battles among ruling party veterans pose a significant risk to Sall's legacy. These political considerations, twinned with the profound economic impact of the pandemic, may serve to distract the government from climate issues ahead of the 2024 elections.

Despite this, Senegal has a fairly robust foundation for civil society action and advocacy around climate issues. The government has worked closely with international partners to integrate climate adaptation measures in decision-making. In 2006, it became one of the first countries in Africa to launch a National Adaptation Plan. Since then, Senegal has also signed up to the Paris Agreement, and adopted a series of pioneering laws and regulations to drive sustainable development, notably in the field of renewable energy and forestry.

At the institutional level, Senegal has developed a relatively solid framework for climate action. In 1994, the government established a National Committee on Climate Change, under the supervision of the Ministry of Environment and Sustainable Development. 2012 also saw the creation of an Economic, Social and Environmental Council, sitting under the presidency. These bodies provide expert guidance to policy-makers on climate adaptation and mitigation. The government has also established multiple focal points to enhance access to international finance vehicles, such as the Green Climate Fund. However, these institutions are generally under-funded and subject to political interference, which has hampered their operational capacity.

Senegal has historically been over-reliant on external financing to drive its climate action; a key opportunity for engagement could therefore revolve around the National Climate Fund. Established in 2015, this fund aims to increase domestic financing of climate change mitigation projects by facilitating investment from the government, private sector and civil society, as well as internationally. The fund was set up with technical support from the UN, but requires additional assistance to become fully operational.

Senegal's emerging petroleum industry and President Sall's ambitious electrification agenda provide an opportunity for civil society engagement on climate issues. Sall views the exploitation of offshore gas reserves as a means to reduce Senegal's reliance on imported heavy fuel oil while boosting energy production. The government's gas-to-power strategy has the potential to reduce emissions, provided offshore projects remain on track. BP's declaration of force majeure on its Tortue LNG project amid the COVID-19 pandemic, and the resulting delays to the development of its Yakaar and Teranga gas fields, represented a major setback for Sall – a petroleum engineer and former head of the national oil company, Petrosen. However, his government is highly receptive to engagement on wind and solar projects, having committed to increasing renewables to 30% of its energy mix by 2030, as part of its strategy to achieve 100% electricity access.

5 ASSESSMENT MATRIX

METRIC	ASSESSMENT*	FINDINGS
POLITICAL		
Instability, conflict and insecurity		Despite a history of stability and respect for rule of law, growing frustrations over poverty and corruption, exacerbated by the pandemic, risk fuelling increased violent political mobilisation in the short to medium term.
Government change		Ruling party in a strong position for the forthcoming 2024 elections. Uncertainty over the current president's successor and growing instability undermining ruling party positioning.
Environmental policy and commitment		Solid foundations in place with the National Adaptation Plan, revision of Nationally Determined Contributions, and increasing prevalence of climate-friendly policies. Recent oil boom raising concerns over the government's commitment to reducing emissions.
International influence		Prominence on the international stage as a key economic and diplomatic hub in the region. President Sall's forthcoming term as African Union chair in 2022 will considerably increase his powers to convene and shape climate debates and mobilise regional stakeholders.
INSTITUTIONAL		
Governance and corruption		Performs considerably better than regional neighbours on corruption and governance. Still, corruption is prevalent within the public administration – notably in procurement – and the president's use of anti-corruption measures to silence opposition undermines his commitment to transparency.
Environmental leadership		A relatively robust institutional framework for climate action, with multiple national committees and councils dedicated to advising on climate policy. Politicisation of the environment ministry and a lack of resources are hampering progress.
Reform commitment and budgetary prioritisation		Demonstrated commitment to reforming key sectors in line with national adaptation objectives, but failed to prioritise climate action within the budget, relying heavily on international finance to implement projects.
Structural capacity		Performance among key institutions hampered by political interference at the Ministry of Environment, as well as by inadequate human and material resources. This has slowed collaboration with technical partners and inhibited access to international finance.
Donor and development partners' support		Receiving considerable support from key international donors, including AfDB, France and Germany. Support to date has focused primarily on energy efficiency, and technical assistance in implementing national adaptation plan programmes.
Dialogue with non-government actors		A vibrant civil society with multiple structures to drive dialogue between NGOs, government and the private sector, including the National Climate Change Committee and the Economic, Social and Environmental Council.
COVID-19 impact		Although Senegal was praised for its public health response to the pandemic, GDP growth has slowed. Growing fiscal pressures, and delays in the development of oil and gas projects will constrain resources available for climate change mitigation and adaptation projects.
SECTORAL		

Urbanisation		The government is seeking to adopt greener practices in the construction sector, and has pioneered a series of public transport and waste management initiatives to reduce emissions driven by urbanisation. Plans for the construction of low-carbon smart cities also provide scope for engagement.
Electrification		The government is targeting universal electricity access by 2025, and aims to increase renewables to 30% of the energy mix by 2030. Governance and corruption in the energy sector, as well as growing fiscal pressures from the pandemic, risk slowing implementation.
Industrialisation		Although industrialisation is not a key contributor to emissions, the government is keen to integrate climate-friendly practices into agriculture, SMEs and innovative industrial parks. Absence of a robust emissions monitoring capacity and framework for encouraging green industry leaves scope for advocacy.
Land use change		A series of initiatives to combat deforestation, and to introduce more sustainable practices into rice and livestock production.
Oil and gas		President Sall aims to reduce Senegal's reliance on highly-polluting heavy fuel oil and by leveraging offshore gas deposits. This represents an opportunity to reduce emissions, provided energy companies stick to their development plans. Delays and indecision provide an opportunity for advocacy around renewables.

*Assessment definitions:

1	Very strong enabling context for climate-spend impact with negligible limitations
2	Strong enabling context for climate-spend impact with some limitations
3	Moderate enabling context for climate-spend impact with several limitations
4	Weak enabling context for climate-spend impact with notable limitations
5	Challenging context for climate-spend impact with major limitations

6 SENEGAL

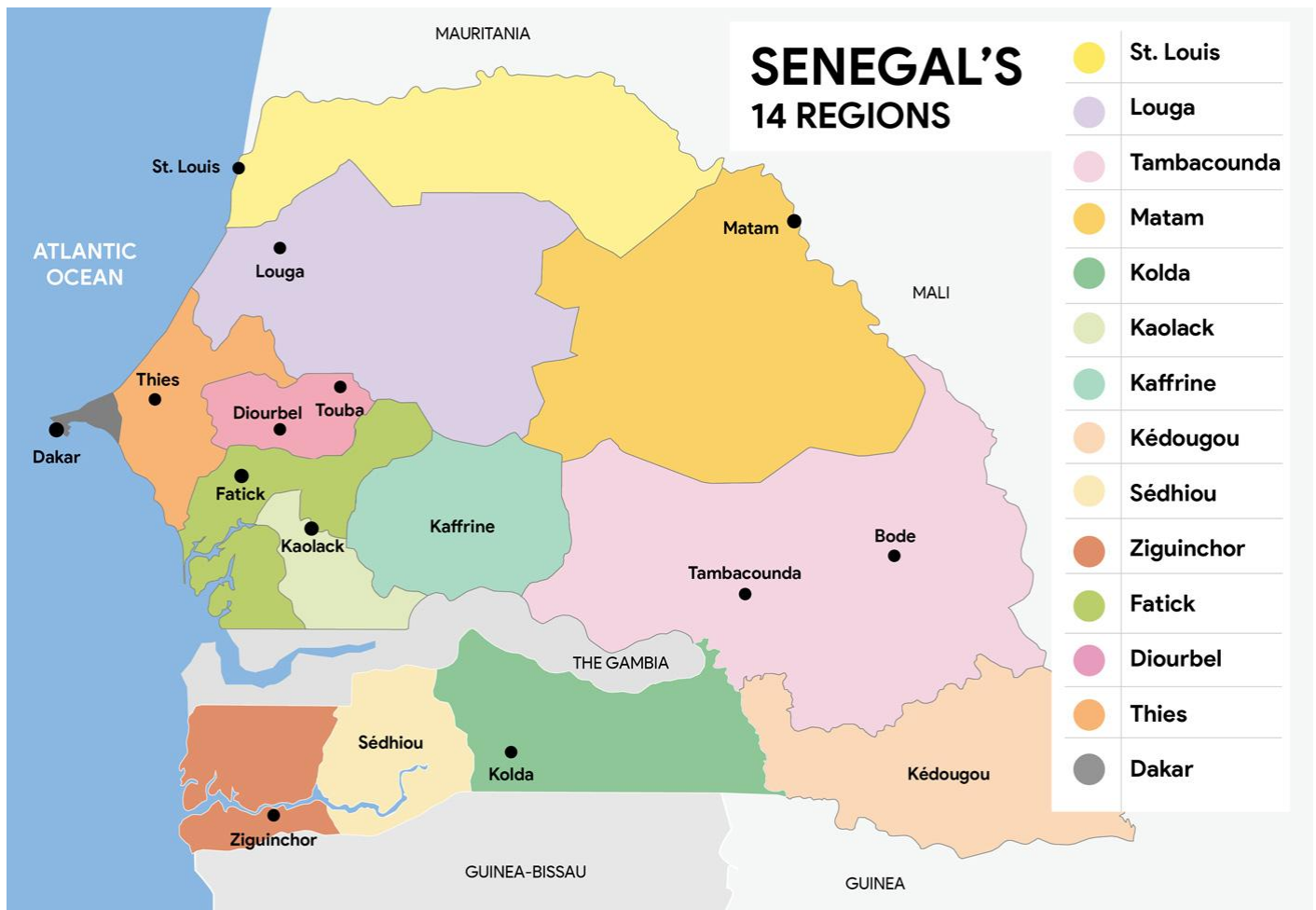
6.1 Political

6.1.1 Instability, conflict and insecurity (strong)

Senegal has long stood as a bastion of stability and democracy in West Africa. Since gaining independence in 1960, it has witnessed numerous peaceful political transitions, and is yet to experience a military coup or any widespread civil or ethnic conflict, in contrast to many of its regional neighbours. This stability has, in part, been driven by Senegal's robust economic growth in recent decades, which has seen the country emerge as a key strategic entry point into broader West Africa. Another key factor is the high levels of religious tolerance and cooperation between Muslim groups, which have prevented the spread of violent Islam.

Senegal has been spared the widespread insecurity which has characterised much of the region, especially across the Sahel. Senegal has avoided any spillover from insecurity in the Sahel region – notably in Burkina Faso, Niger and neighbouring Mali – but is exposed to some risk, given the region's porous borders.

Historically, separatists in the Casamance region fought for independence, leaving thousands dead and fuelling criminal activity. However, tensions have eased in recent years thanks to greater regional diplomatic engagement and the Sall administration's efforts to address underlying grievances. The conflict currently poses no existential threat to the state.



Senegal's strong democratic ethos has enabled multiple large-scale protest movements to mobilise citizens against government corruption and repression. Ahead of the presidential elections in 2012, incumbent President Abdoulaye Wade (2000-2012) sought to amend the constitution and to extend his rule beyond two terms. Youth groups banded together under the banner *Y'en a Marre* (Enough is Enough), launching protests for four weeks, which brought the country to a standstill and forced Wade to concede peacefully to current President Macky Sall.

Sall was re-elected in 2019, but there are now signs of growing popular frustration with his administration. While the president has been credited with overseeing strong economic performance, many young urbanites claim that growth has failed to trickle down, leaving poverty widespread. Frustration has also been mounting over Sall's apparent use of anti-corruption laws to target his political opponents; in 2013 and 2017 respectively, Sall placed Karim Wade, son of former President Abdoulaye Wade, and Mayor of Dakar Khalifa Sall under arrest on corruption and fraud charges; both men were considered political rivals to the president.

Sall's behaviour, as well as growing frustrations over COVID-19, are now fuelling a resurgence in anti-government sentiment and protests, most notably the nationwide opposition protests that took place in March 2021 (see text box below). While these protests are a sign of democratic vibrance, they do pose a risk to longer-term political stability in the country, as they call into question Sall's legitimacy.

However, it is highly unlikely that opposition mobilisation will result in President Sall being removed from office. While some demonstrators have called for his removal, Sall won over 58% of the vote in the 2019 election, and retains firm control over the security forces and other key levers of power.

March 2021 opposition protests

In March 2021, youth activists and broader civil society groups launched a series of violent demonstrations against the Sall administration. Protests were sparked by political anger at the arrest of a key opposition figure, and fuelled by deeper resentments around the management of the pandemic and unjust living costs.

In March, opposition leader Ousmane Sonko was arrested for alleged rape and stripped of his rights to run in the next presidential elections, which will be held in 2024. Sonko – who came third in the 2019 presidential election – is considered a key challenger in the 2024 election, owing to his broad support base among Senegal's youth. Opposition groups, led by the Movement to Defend Democracy, alleged Sonko's arrest was yet another move by Sall to sideline a key political rival ahead of the presidential race, and launched violent protests in the capital, Dakar.

Very quickly, Sonko was able to mobilise his vast youth following. The protests became a vector for broader frustrations against the Sall administration's failures on governance and the economy, issues which have been exacerbated by the pandemic. Protestors denounced the government's inability to tackle youth unemployment and poverty, as well as the president's tendency to politically disarm his rivals.

After interventions from religious leaders and civil society figures, Sall adopted a conciliatory approach and released Sonko on bail, restoring the latter's rights to run for office. However, Sonko, who is keen to delegitimise Sall, is calling for further protests. The COVID-19 pandemic – which is resulting in severe

welfare losses among some communities – also risks fuelling increased anti-government sentiment in the coming months.

These protests demonstrate the willingness of the country's youth to exercise their democratic rights in the face of perceived injustices; however, with Senegal now encountering a deadly third wave of COVID-19, and further restrictive measures potentially around the corner, additional protests are likely, and risk undermining Sall's authority at home and abroad.

6.1.2 Government change (moderate)

The next presidential elections in Senegal are due to take place in 2024. In accordance with constitutional amendments in 2016, Sall is not permitted to run. Under his leadership, the ruling party – Alliance pour la République – and its coalition partners – Benno Bokk Yakaar – have developed robust grassroots structures underpinned by popular local development programmes. The Sall administration's credible public financial management has also won support among the local economic elite and international development partners.

If he does step aside, which we assess as the most plausible scenario, Sall will be looking for a successor for 2024 to build on his political legacy. At present, there is no such figure within the ruling party – multiple reshuffles have seen some influential veterans removed from power.

It is highly likely that as the 2024 elections approach, infighting within the ruling party overshadows government thinking around development issues, including climate change. This disruption will be balanced out by a degree of continuity – whoever emerges as Sall's chosen successor will be strongly encouraged to align with Sall's development agenda, enshrined within the Emerging Senegal Plan (PSE), which includes the government's gas-to-power strategy.

However, a ruling party victory in 2024 is by no means a guarantee. As evidenced by the March 2021 protests, there is growing frustration that Sall's focus on macroeconomic growth and infrastructure has favoured the ruling elite and failed to translate into tangible benefits for young adults. The pandemic has served to highlight these inequalities, resulting in growing support for opposition leaders. As outlined above, Sall has sought to neutralise the opposition threat by offering high profile government positions to some rivals – including Idrissa Seck, profiled in section [6.2.2](#).

This leaves Sonko, head of the opposition Pastef party, as the biggest threat to the ruling establishment. At only 44, he provides a viable alternative for Senegal's youth compared to the "old guard" elite. He has a three-year period in which to expand his already significant support base.

6.1.3 Environmental policy and commitment (moderate)

Senegal is highly vulnerable to the impacts of climate change. The most urgent threats are:

- **Rising sea levels.** Around 67% of the population and over 90% of industrial production are based in urban coastal zones, with large communities and strategic economic projects at risk of flooding, erosion and salinisation.
- **Erratic rainfall.** In 2009 and 2012, widespread and destructive floods revealed profound inadequacies in the government's flood mitigation planning which led to a 10-year plan to combat flooding, worth

USD 1.4 billion. Despite this, Senegal's rainy seasons have brought increasingly routine flooding. In September 2020, over 3,200 socio-economically marginalised residents of Thiès were left homeless following flooding; and in August 2021, heavy rainfall in Dakar forced hundreds to abandon their homes.

- **Drought.** Senegal has a long history of droughts, with catastrophic ones taking place in the 1970s and 1980s and leaving a lasting impact on vegetation and soil quality across the country. Droughts are now occurring with greater frequency; they risk undermining strategic sectors such as agriculture and fisheries, which account for the majority of employment. Recent droughts in 2011, 2014 and 2018 left over a quarter of a million people food-insecure.

Despite the above, Senegal has not yet published a comprehensive national climate change strategy. In 2006, the government developed a National Adaptation Programme of Action (NAPA), which identifies water resources, agriculture, and coastal zones as the country's most vulnerable sectors. Since then, the government has gradually begun to identify climate change impacts, vulnerabilities, and to mainstream adaptation into development planning.

Senegal is a signatory to, and a participant in, numerous international initiatives and programmes. The country ratified the Paris Agreement in 2016, submitting a detailed Nationally Determined Contribution (NDC), which was revised ahead of COP26 in 2021. The NDC is aligned with Senegal's overall socio-economic development strategy, the PSE.¹ All climate-focused measures within the NDC are therefore aligned with the priorities of the PSE and of the Sall government. During COP26 events in November 2021, Senegal pledged its support to the Green Grids Initiative, Global Methane Pledge, Glasgow Leaders' Declaration on Forests and Land Use, Global Coal to Clean Power Transition Statement, and Africa Integrated Climate Risk Management Programme.

The updated NDC sets unconditional emissions reductions targets of 5% and 7% by 2025 and 2030 respectively, with these targets set to increase to 23% and 29% in the conditional contribution. The updated version also includes a clearer definition of conditionality, with unconditional contributions consisting of activities carried out by national means (e.g. government authorities) and conditional contributions being achieved with international support.

International support under the revised NDC will encompass additional funding, facilitation of the transfer of environmentally sound technologies, and the strengthening of national institutional and human capacities on climate action. The NDC lays out comprehensive funding requirements – for example, out of USD 8.7 billion to finance mitigation measures, USD 3.4 billion are classed as unconditional, and USD 5.3 billion as conditional.

An addendum to the national development plan, the PSE Vert (Green PSE), is focused on environmental matters, aiming to enshrine climate change mitigation and adaptation into national-level thinking. The document has a major focus on reforestation (see section [6.3.2](#)).

Beyond the PSE, Senegal has also taken steps to mainstream climate financing into its national development priorities. In 2015, the government established the National Climate Fund to drive investment in climate change mitigation projects. The fund aims to mobilise USD 60 million per annum, of which the government is expected to mobilise around USD 10 million each year, with the remaining funding coming from development

¹ See [Senegal. Revised NDC. December 2020](#).

partners such as UNDP and the Green Climate Fund. However, government ownership of the fund has been weak. Its administration remains with UNDP, which has created the basic architecture of a steering committee and an executive secretariat, responsible for liaising with domestic and international partners. Significant gaps remain before the fund can become fully operational and mobilise additional external financing.

While Senegal has demonstrated considerable commitment to the climate agenda, there have been growing concerns among international climate partners that the growth of the country's oil sector could serve as an obstacle to reducing emissions. Although the government has pledged to diversify its energy mix through an increased focus on natural gas and renewables, there remains a risk that President Sall will continue to prioritise oil projects as a means of funding the country's post-pandemic recovery, to the detriment of alternative low-carbon energy resources (see section [6.3.5](#)).

6.1.4 International influence (very strong)

Since coming to power in 2012, President Sall has successfully positioned Senegal as a major player on the global stage, both diplomatically and economically. The country's strong growth, burgeoning oil and gas sector, and relative political stability make it a key partner for global businesses and governments.

Under Sall, Senegal has also become a major contributor to international climate initiatives, including the Great Green Wall project. It is a leading global destination for the holding of climate events – the National Adaptation Programme Forum in 2019, for example, brought together key regional stakeholders to debate progress on implementation of National Adaptation Programmes of Action (NAPAs). In February 2021, Sall co-authored an article on multilateralism and climate change with Emmanuel Macron, Angela Merkel, António Guterres and other global leaders.

President Sall's international clout is set to increase in 2022, when he is expected to take over from Congolese President Felix Tshisekedi as the chairman of the African Union. Climate change is high on President Tshisekedi's AU agenda for 2021, and is expected to remain central to Sall's agenda come 2022. The role will give Sall considerable scope to influence regional debates on climate change.

Sall is likely to use his position to highlight Senegal's considerable progress on reforestation, and to push for more robust forestry policies across the continent. Sall's position will also allow him a platform to signal Senegal's continued commitment to its emissions reduction targets, but stressing Senegal's energy transition – underpinned by the shift from heavy fuel oil to natural gas in power generation and with investments in wind and solar projects.

Sall's position at the AU will provide a major opportunity for civil society organisations advocating on environmental and climate change policy to leverage their relations with the Senegalese authorities and shape continental agendas. President Sall is likely to appoint a panel of expert advisers to help shape and implement his AU agenda. Climate actors should seek to engage in the agenda-setting process as early as possible, by attending these early discussions and advocating for specific issues to be elevated in importance. At this stage it is unclear who will sit on Sall's advisory team, or what form these agenda discussions will take, leaving considerable scope for ideas to take root.

Regional trade liberalisation will also be on President Sall's agenda during this time as AU Chairman, as the body endeavours to operationalise the African Continental Free Trade Area (AfCFTA). Senegal has emerged in the last decade as a regional trade hub, and could see its real income increase by over 5% following the

implementation of trade liberalisation measures. President Sall is consequently a key supporter of the AfCFTA, and in 2019, Senegal hosted the Regional Forum on the African Continental Free Trade Area, in partnership with the Economic Commission for Africa, the African Union Commission and the European Union, providing an opportunity for regional stakeholders to discuss measures for implementing the AfCFTA.

6.2 Institutional

6.2.1 Governance and corruption (moderate)

Corruption is viewed to be lower in Senegal than its regional neighbours, with the country ranking 87th out of 180 countries on Transparency International's 2020 Corruption Perceptions Index (neighbouring Mali was 129th). This relatively positive ranking owes much to Senegal's history of respect for the rule of law and democracy, as well as the comparative openness of civil society and freedom of the press.

Senegal has the fundamental anti-corruption frameworks in place. The Penal Code criminalises extortion, bribery, corruption, illicit payments to foreign officials and money laundering. President Sall has also introduced new state bodies in line with his election promises to eradicate corruption: The National Office for Combating Fraud and Corruption (OFNAC) and the Court for the Eradication of Illicit Enrichment (CREI), a specialist court to hear cases of illicit enrichment.

However, these bodies and legal provisions have been undermined by the politicisation of the judicial system and of the anti-corruption process, which has been leveraged against Sall's rivals. The judiciary also lacks independence; there is a high level of opacity around the appointment of key judges, and around the selection of cases by the Public Prosecutor, both of which fall under the supervision of the executive.

The country's offshore oil and gas industry has become a major focus of corruption allegations. In 2019, President Sall's brother was forced to resign as director of a government investment fund following international publicity of historic bribery allegations concerning petroleum licensing. These events have only served to deepen perceptions of a privileged, impune elite within Senegal's public administration.²

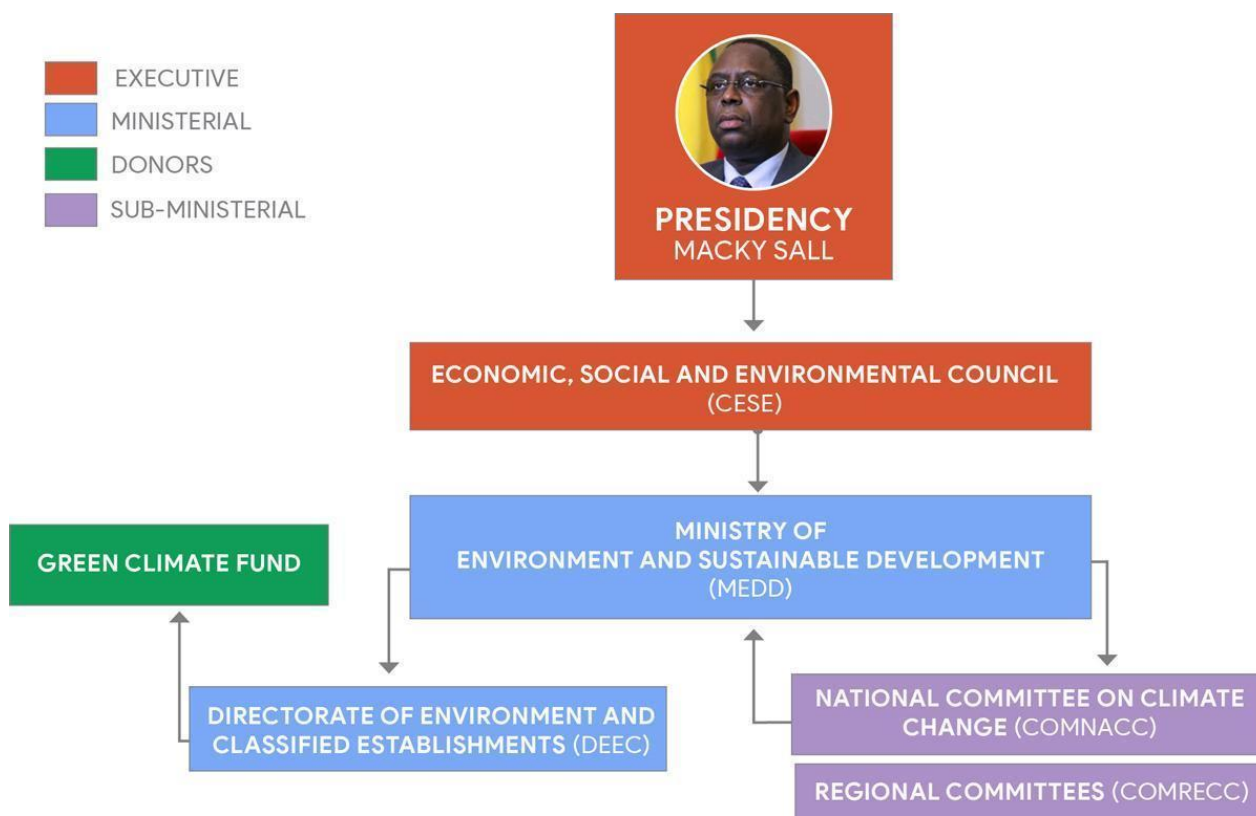
Organisations advocating on climate change in Senegal are exposed to numerous corruption risks. Public procurement was the primary locus of corrupt activity under the Wade administration, with the award of high-value infrastructure and construction contracts operating as a common pretext for embezzlement. Procurement fraud is less pervasive under Sall, largely owing to the increased capacity of the national public contracts regulatory authority. Nonetheless, corruption, bribery and favouritism in the contract-award process remain common. Those engaging in public procurement in Senegal are therefore recommended to conduct rigorous due diligence to mitigate these corruption risks.

6.2.2 Environmental leadership (moderate)

Senegal has a relatively strong institutional framework for addressing the challenges posed by climate change. The Ministry of Environment and Sustainable Development (MEDD) is responsible for overseeing all policy issues relating to climate and the environment, and leads on the development of the NAPAs. The Directorate

² Aliou Sall resigned from his post as director of the state-run Caisse des Dépôts et Consignations fund after the BBC revealed that he had secretly been paid USD 250,000 in 2014 by Pétro-Tim, an oil and gas company founded by Romanian-Australian businessman and convicted heroin dealer Frank Timis. Pétro-Tim was awarded stakes in two prospective petroleum licences soon after its incorporation, which it later sold to BP following the discovery of petroleum deposits. In January 2021, the judiciary dismissed the case against Aliou Sall, but opposition groups claimed the investigation had been terminated on the order of the president.

of Environment and Classified Establishments (DEEC) sits within the MEDD and is mandated with building awareness and knowledge among government agencies and international partners on climate change issues.



The MEDD is overseen by the National Committee on Climate Change (COMNACC), a central cooperative platform composed of experts from line ministries, the private sector and civil society. It is also guided by the Economic, Social and Environmental Council (CESE), which is another key advisory body coming under the purview of the presidency. Other line ministries with responsibility for climate change include: the Ministry of Energy; the Ministry of Agriculture and Water Resources; the Ministry of Finance and Planning.

Ministry of Environment and Sustainable Development (MEDD)

MEDD is the central government body responsible for formulating and implementing national environmental and climate change policy. It is headed by Abdou Karim Sall (no relation to the president), who was appointed minister in April 2019 – his first cabinet post. Karim Sall trained as a telecommunications engineer, and previously served as the CEO of the Telecommunications and Postal Regulatory Authority (ARTP). He serves as a community organiser for President Sall’s APR party in the Dakar suburb of Pikine.

Karim Sall has been credited with introducing multiple progressive climate policies, including expanding Senegal’s classified forests. However, he has also abused his ministerial powers to divert public resources for personal gain, moving six oryx from a state nature reserve to his farm. Despite this apparent abuse of office and the outcry it created, Karim Sall remained in post, indicating that he retained the president’s confidence.³

Senegal still has not developed a comprehensive national climate change policy, but rather has been actively engaged on climate change for a number of years through the development of plans and adaptation and

³ In July 2020, Abdou Karim Sall diverted six oryx (a breed of gazelle) from the Katané nature reserve in Ranérou, Matam region, north-east Senegal, to his private farm in Bambilor, outside of the capital Dakar, claiming that the public reserve was overpopulated. The scandal prompted questions in parliament, civil society groups to call for his dismissal, and led the mayor of Ranérou to demand the return of the oryx, two of which reportedly perished in transit to the private farm.

mitigation strategies that are aligned with international priorities. There are currently no advanced plans for the development of a national climate change policy, but once this process is launched, MEDD will play a central role in close consultation with the National Committee on Climate Change (see below).

Directorate of Environment and Classified Establishments (DEEC)

DEEC sits within MEDD and is responsible for strengthening the awareness and building knowledge of climate issues among various government agencies, as well as for engaging with external donors on climate financing. It should therefore be considered central to climate advocacy efforts.

- *Baba Dramé (Director)*. With extensive experience advising on climate issues across government and civil society, Dramé was appointed to this position in 2019, after working as a technical advisor within the directorate. He has also served as the International Labour Organisation's external collaborator overseeing the coordination of the Green Economy Partnership. He subsequently served as national coordinator of the Support Program for the Creation of Green Job Opportunities within MEDD, and as a senior officer at the Global Green Growth Institute, where he focused on waste management issues.
- *Madeleine Diouf Sarr (Head of Climate Change)*. Sarr serves as the head of the Climate Change division within DEEC, and leads the Technical Committee on Climate Change at MEDD. She also heads the COMNACC Secretariat and is the Senegalese government's focal point for the Green Climate Fund (GFC). Through her positions at DEEC and COMNACC, Sarr plays a central role in coordinating climate policy development and advocacy. As the GFC focal point, she also is an influential stakeholder in Senegal's efforts to access international climate funding, with strong connections to donors.

National Committee on Climate Change (COMNACC)

COMNACC, established in 1994, is a cross-sectoral committee on climate change composed of representatives from the public and private sectors, NGOs and civil society. It is in charge of coordination, consultation, information sharing, management and monitoring of key climate initiatives. The committee also serves as a key focal point for the United Nations Framework Convention on Climate Change (UNFCCC), and works to foster closer alignment between global and national climate priorities.

COMNACC has numerous regional branches (COMRECC) which mirror its operations at the local level. Each regional branch is composed of representatives from various de-centralised authorities, including local collectives, private sector associations, NGOs and community organisations. COMNACC is currently chaired by Professor Boubacar Fall, a geology teacher and researcher at the Cheikh Anta Diop University in Dakar. Madeleine Diouf Sarr heads the COMNACC Secretariat.

Economic, Social and Environmental Council (CESE)

Established in 2012, CESE is Senegal's second-highest constitutional assembly. It serves as a consultative forum offering expert guidance and research to the president, the National Assembly, the prime minister and other major decision-makers. CESE continually monitors progress on key social, economic and environmental issues, and recommends necessary adjustments to policies and regulations. It also aims to promote political dialogue and cooperation between local authorities and foreign entities.

In November 2020, President Sall dismissed ruling party heavyweight Aminata Touré as president of CESE and in a surprise move replaced her with opposition leader Idrissa Seck. Sall has tasked Seck with focusing CESE's efforts on youth employment, illegal immigration, as well as on key climate change issues. These issues include

several themes which have increased in political salience in recent years, most notably, flooding, coastal erosion, natural resources management and adaptation within the oil and gas sector.

These issues are becoming top government priorities due to the threat they pose to economic development. Senegal's major power plants and petroleum process facilities are situated along the Atlantic seaboard, making them highly vulnerable to flooding and coastal erosion. Further, Senegal views the hydrocarbons and power sectors as key drivers of future post-pandemic recovery, but must reassure international partners that growth will be managed in an environmentally sustainable manner.

6.2.3 Reform commitment and budgetary prioritisation (moderate)

High-profile initiatives such as the PSE Vert – which call for large-scale reforestation and the diversification of the energy mix towards renewables – demonstrate that environmentalism is becoming increasingly central to the government's thinking.

Despite this, public commitment to climate change mitigation and adaptation has often not been borne out in budgetary prioritisation. According to a January 2020 report released by the government's Environmental Monitoring Unit, the country's financing needs for climate change mitigation and adaptation, as enshrined in Senegal's NCDs, stand at USD 5 billion and USD 14.5 billion respectively (a total of around USD 20 billion). This level of investment would allow for a reduction of emissions of 21% by 2030.

These targets are still far off being met. Despite Senegal's efforts to improve access to international climate finance by setting up financing focal points, the government's own investments have continued to fall short. Between 2006 and 2019, the proportion of domestic funding allocated to climate initiatives as a percentage of overall budget spending has consistently decreased. Such slow mobilisation of funds risks prolonging the implementation of key projects enshrined within the NCDs.

There is a growing realisation among Senegalese government officials and international partners of the need for a profound paradigm shift in Senegal's approach to climate financing. Efforts are now underway within the administration to boost institutional capacity to drive more effective planning and resource mobilisation around climate change. The establishment of the National Climate Fund is expected to accelerate progress in mobilising resources from government, donors and the private sector.

6.2.4 Structural capacity (moderate)

Senegal's institutional architecture governing climate change issues is fairly robust. However, under Sall's administration, low investment has resulted in a lack of sensitivity among some stakeholders to the mechanisms of climate finance. Certain key institutions have also suffered from increasing political influence, and many are under-equipped and under-funded, limiting capacity and impact. Below we outline the main limitations of the key institutional players.

BODY	CHALLENGE	DETAILS
MEDD	High leadership turnover	Since Sall came to power, MEDD has seen a high turnover of ministers. Ali Haïdar was the first to be appointed under Sall, but was swiftly replaced by Abdoulaye Bibi Baldé, who in turn was then dismissed and succeeded by Mame Thierno Dieng. This high rate of change at the top of the ministry has

		undermined policy continuity and coordination. With the current minister, Abdou Karim Sall, the president has appointed a close ally and an influential member of the ruling party. The minister's retention in recent reshuffles, despite his implication in an environmental scandal, indicates his strategic relationship with the president.
	Politicisation under current minister	Since the minister was appointed in 2019, MEDD has encountered growing internal political tensions which risk undermining decision-making and policy cohesion. Minister Karim Sall's critics claim he is treating the ministry as a political power base, favouring those aligned with the ruling party. This has allegedly led to a series of resignations in recent years – most notably: the former head of the Centre for Environmental Education and Training and the former head of DEEC, both of whom resigned in 2019, shortly after the minister's appointment.
DEEC	Limited resources and institutional knowledge	While DEEC serves as the country's primary focal point with the UNFCCC and global climate financing mechanisms such as the GCF, a lack of resources is hindering capacity. The head of the DEEC Climate Unit, Madeleine Diouf Sarr, has limited human and material capacity within her department, which consists of only four staff, covering forestry, adaptation, mitigation and capacity building. They appear to be lacking sufficient knowledge of the GCF and climate financing issues more broadly.
COMNACC	Limited resources and institutional knowledge	Historically, COMNACC has suffered from a lack of dedicated human, financial and material resources. The body has also been slow to build its institutional knowledge around international climate financing issues and its understanding of the GCF's operational modalities, which has hindered access to finance in the past.
	Lack of resources at local level	COMNACC's regional branches are also lacking in human and financial resources, meaning the body has struggled to perform its mandate at the local level. This has resulted in a significant disparity between national-level policy formulation and local-level implementation. Continued bilateral support from partners such as JICA, GIZ and the EU has helped to support COMNACC's mandate to provide expert dialogue and advisory on climate change.
CESE	Leadership politicisation	Seck, formerly an opposition leader, came second in the 2019 presidential election, and was previously considered a key contender in the 2024 election. This has led to speculation that his appointment at the helm of Seck was motivated by President Sall's desire to remove opposition threats ahead of the next election by co-opting them. In turn, this has raised concerns over the potential politicisation of CESE, which may undermine its independent advisory position.

6.2.5 Donor and development partners' support (very strong)

Senegal has long been keen to engage with international partners on climate change issues. The country began developing its first national adaptation programme in 2006, and has since taken steps to increase alignment with global climate financing mechanisms, namely through the creation of DEEC as a financing focal point.

Senegal is working closely with numerous international development partners to drive climate resilience and reduce emissions across different sectors: the European Union (EU) has provided considerable support to the government on coastal erosion mitigation; the French development body AFD is supporting Senegal to invest in low-carbon and climate-resilient development through its USD 280 million "Transforming Financial Systems for Climate" programme (in partnership with GCF); the German development body GIZ is providing technical assistance on the implementation of the national adaptation plan, with a focus on promoting energy efficiency.

As evidence of its growing influence within the international development community, Senegal has hosted a number of major climate-focused events in recent years. In 2018, Dakar hosted a seminar on gender mainstreaming in climate change action, in partnership with the African Development Bank (AfDB). In April 2021, President Sall was one of several African heads of state in attendance at a high-level climate financing summit – the Leaders' Dialogue on the Africa COVID-Climate Emergency, hosted by the AfDB.

In September 2021, Senegal is due to host the Climate Chance Africa Summit in partnership with the UNFCCC. The summit will convene local governments, businesses, trade unions, NGOs, youth and women's groups, and researchers from across the African continent to discuss and exchange views on crucial environmental and climate issues. The annual summit, which was first held in 2018, will be held online this year owing to the pandemic. It allows grassroots actors an opportunity to showcase their progress in addressing climate issues, and to rally in advocating for change. It is therefore a key event for determining Africa's climate change agenda. The summit operates via a series of plenary sessions, workshops, focus sessions and side events, allowing attendees multiple opportunities to network and share insights.

International influencers

France has long been Senegal's closest ally and most influential trading and development partner. France operates a network of major telecom companies, banks and retail giants across Senegal, and retains a high degree of political influence. However, in the last few years, there has been a marked increase in anti-French sentiment in West Africa. France's counter-terrorism operations in the region, as well as its interference in regional politics and economic debates, has reinforced perceptions of France as a neocolonial meddler. The government's close ties with France are now becoming integrated with broader anti-government rhetoric; indeed, the March 2021 protests in Senegal had a distinctly anti-French flavour, with many protestors targeting and destroying French commercial sites to voice their frustration over France's continued influence in the country. These trends may serve to undermine France's historic dominance in the country.

As France's dominance in the region starts to wane, China is emerging as an increasingly influential partner. Across the continent, China is investing in key infrastructure and development projects to expand its diplomatic and commercial footprint. In Senegal, for example, China is set to construct a USD 700 million road from Touba to Thiès. Senegal is due to host the Forum on China-Africa Cooperation in September 2021; this forum will provide an opportunity for China to expand its commercial footprint in Senegal and across Africa. However, China too is facing increasing local resistance, namely from fishing communities, who denounce China's depletion of local fish stocks.

In terms of climate change mitigation, France is still considered the more valuable ally in Senegal, with AFD still one of the country's key climate partners. China is yet to fully establish itself as a climate partner in the country, and is even considered to be negatively impacting the country, with the majority of illegal logging in Casamance being shipped to China.

6.2.6 Dialogue with non-government actors (strong)

Senegal has a vibrant and diverse civil society landscape, hosting a large collection of NGOs and research institutes specialising in improving adaptation capacities and building adaptation networks. NGOs in Senegal broadly are able to operate independently, and are becoming increasingly coordinated. The Council of Non-Governmental Organisations for Development Support (CONGAD) serves as the main coordinating body for NGOs. It provides a solid framework for dialogue around social, economic and political issues and aims to strengthen the technical capacity and influence of civil society groups to shape policy agendas.

Senegal has established multiple platforms to facilitate dialogue with civil society actors in the climate space. COMNACC serves as the country's foremost platform for this, hosting regular conferences which convene key stakeholders from government, private sector and civil society. While CESE is also open to input from civil society and sectoral experts on environmental matters, the body does not have a pure focus on climate change, limiting its thematic convening capacity.

In 2018, the government partnered with the UN's Partnership for Action on the Green Economy (PAGE) to launch the National Platform on the Green Economy. This will serve as a multi-stakeholder platform for information sharing and coordination on issues such as green financing, green jobs and sustainable exploitation of Senegal's growing oil and gas sector.

6.2.7 Non-government influencers

ENDA

ENDA is an international NGO that forms part of the Global Network of Civil society Organisations for Disaster Reduction (GNDR). ENDA's energy wing, ENDA Energie, is responsible for overseeing all issues relating to environment and climate change, including desertification, disaster risk reduction and renewable energy. In Senegal, ENDA Energie supports CSOs by developing innovative programmes, and building the capacity of local NGOs in analysis, research and training. ENDA also supports local NGOs in their advocacy efforts with local and national governments. ENDA Energie has been directly involved in multiple high profile projects in Senegal, most notably the National Biogas Programme of Senegal, which aims to increase the adoption of biogas solutions to replace wood burning as the main source of cooking fuel.

Océanium

Océanium is a local NGO which specialises in reforestation efforts. The organisation has been working in Senegal since 2006, where it has been sensitising local communities, governments and national level decision makers to the detrimental effects of coastal erosion on mangrove trees. In turn, Océanium has stressed to decision makers the direct impact of this deforestation on national emissions targets, and on local agricultural development. Océanium has piloted the Plante Ton Arbre ('Plant Your Tree') initiative, which has become one of the largest participatory restoration projects in Senegal. Having operated in the country for almost 20 years, Océanium has a deep understanding of the local climate philanthropy landscape and of advocacy routes within government.

Centre de Suivi Ecologique (CSE)

The CSE is a non-profit organisation which comes under the indirect oversight of the MEDD, as well as key climate-oriented civil society actors. Despite being a government-operated entity, CSE operates with considerable autonomy and is viewed as straddling the public and CSO space. It is mandated with monitoring and evaluating environmental and adaptation projects within Senegal – i.e. the collection, processing and analysis of statistics – and with disseminating this information to government decision makers, CSOs, research institutions and the private sector. This is with the ultimate aim of better understanding and mitigating the impacts of climate variability on national ecosystems and populations. CSE has taken part in multiple internationally-funded projects, including the European Space Agency’s “Global Monitoring for Food Security” project, and the EU Development Fund’s African Monitoring of Environment for Sustainable Development initiative.

6.2.8 COVID-19 impact (challenging)

During the first wave of COVID-19, the Senegalese government was credited with its expeditious and coherent response to the pandemic. The public health apparatus was well prepared in comparison to regional neighbours, having already dealt with a deadly Ebola outbreak in 2014, as well as multiple outbreaks of HIV/AIDS. The government used a combination of swift and aggressive interventions to slow transmission, while deploying experienced health teams to implement frontline responses. These public health measures succeeded in keeping cases and deaths relatively low compared to the broader continent.

The situation has now changed somewhat, after the advent of the Delta variant on the continent. Senegal is experiencing a deadly third wave driven by the Delta variant, and the health system is operating at full capacity. According to medical practitioners, almost all hospital beds in the capital are now occupied, and over half of beds beyond the capital are full. Instances of serious illness and of death have increased significantly in the third wave, with ambulance and burial services reporting an unprecedented increase in respiratory illnesses and mortality. This third wave has been exacerbated by difficulties in rolling out COVID-19 vaccines, with hesitancy still high among many rural dwellers.

The pandemic has taken a severe toll on Senegal’s economy and public finances. Between 2014 and 2018, the country recorded some of the strongest economic growth in Africa, consistently over 6% per year. In 2020, the slowdown in the strategic tourism and hospitality industries, the stalling of oil and gas projects, and a fall in foreign remittances saw GDP growth of just 1.3%. Growth was expected to return to around 5.2% in 2021, assuming key sectors are able to reopen; however, the third wave may result in a slower recovery. The government’s Economic and Social Resilience Programme (ESRP) aims to shield the most vulnerable and protect informal livelihoods, but has been hampered by weak budgetary reserves and poor social security architecture.

This economic slowdown risks undermining the government’s long-term development plans. According to the IMF, Senegal’s oil and gas industry could drive a 7% increase in GDP growth in the next 20 years. Any long-term delays in oil and gas projects risk throwing the government’s debt and development planning off track, and may necessitate a shift in budget allocations away from climate mitigation towards strategic economic sectors.

6.3 Sectoral

SENEGAL

SECTOR OPPORTUNITIES & RISKS

Sector	Opportunities	Risks
 <p>Urbanisation</p>	<ul style="list-style-type: none"> • Use of clinker in cement manufacturing • Promotion of green buildings • Use of integrated transport systems • Promotion of waste management facilities • Construction of smart cities 	<ul style="list-style-type: none"> • Continued high cost of electricity • Pandemic fiscal pressures
 <p>Electrification</p>	<ul style="list-style-type: none"> • Government plans for universal access by 2025 • Government targeting 30% renewables by 2030 	<ul style="list-style-type: none"> • Poor governance within the electricity sector • Persistent inefficiencies at utility company Senelec
 <p>Industrialisation</p>	<ul style="list-style-type: none"> • Government plans to develop more efficient agriculture sector, and to promote SMEs and innovative industrial parks • Provides opportunities to engage around sustainable agriculture, and to advocate for robust framework to encourage green SMEs 	<ul style="list-style-type: none"> • Lack of robust emissions data for industrial sectors • Lack of comprehensive green industry framework
 <p>Land use change</p>	<ul style="list-style-type: none"> • Drive increased government engagement around livestock • Support sustainable rice production • Support expansion of reforestation efforts 	<ul style="list-style-type: none"> • Lack of robust government strategy around livestock • Continued prevalence of wood as key fuel for households
 <p>Oil and gas</p>	<ul style="list-style-type: none"> • Support government efforts to shift from heavy fuel to gas for energy generation 	<ul style="list-style-type: none"> • Continued focus on oil exploration to detriment of alternatives • Fiscal pressure leads government to prioritise oil over renewables

6.3.1 Urbanisation (moderate)

Urbanisation has accelerated at a rapid rate in Senegal in recent decades. In 1960, 23% of the population resided in cities; by 2030, this is expected to rise to 52%. According to recent studies by the AfDB, construction, transport and waste management will be the key GHG emitters resulting from urbanisation in Senegal. Construction and manufacturing collectively account for 5.5 MT CO₂e out of a total of 8.8MT CO₂e emitted by fuel combustion, and for 4% of total national emissions. Meanwhile, transport accounts for roughly 7% of total national emissions, and waste management for around 17%.

In its national adaptation planning, the government has laid out several solutions to mitigate against growing emissions in these sectors. In the construction sector, it aims to reduce emission by substituting CO₂ with clinker in the manufacture of cement, and to promote green, insulated buildings to reduce heat loss. It is also introducing a series of integrated, low-carbon public transport systems to reduce emissions, including the Rapid Bus Transit system in Dakar, and the Regional Express Train, which runs from the centre of Dakar to the international airport outside the capital.

Given waste management's major contribution to national emissions, the government is seeking to prioritise the sector in its long-term sustainability plans. It is thus aiming to construct three new waste recovery centres in the cities of Tivaouane, Touba and Kaolack. These will include facilities for recycling and for the capture of methane gas. The government is also planning to reinforce the purification capacity at existing waste centres, including at Camberène and Rufisque.

Senegal is also pioneering a solution to soaring urbanisation with its plans for new smart cities. Through the use of innovative technologies, artificial intelligence and cloud data storage, the aim is to ease congestion in major cities by constructing a series of smaller-scale, low-carbon developments. The USD 2 billion Diamniadio city – under construction on the outskirts of Dakar – is the government’s first attempt in this vein. However, progress at Diamniadio could be hampered by difficulties in convincing industry and government officials to relocate to the city. Persistently high electricity costs, as well as budget reallocations in light of the pandemic, could further undermine progress in the reform of key emissions sectors linked to urbanisation.

6.3.2 Electrification (strong)

Senegal’s energy sector is characterised by a split between the collection and use of biofuels to supply domestic energy, and the importation of fossil fuels to generate electricity for public and corporate use. According to the World Bank, as at 2019 almost 80% of Senegal’s 940 MW grid capacity was driven by heavy fuel oil (67%) and coal (12%), while solar and hydropower accounted for the remaining 12% and 9% respectively.

Universal access plans

As of 2021, over 60% of the Senegalese population currently has access to electricity. While this is one of the highest access rates in West Africa, over 1.1 million homes nationwide are still without power. To address this, the government aims to achieve 100% electricity access by 2025, and to expand its generation capacity to 2.5 GW by 2030. The hope is that recent large-scale offshore gas discoveries will provide feedstock to existing thermal power plants that currently rely on imported and highly polluting heavy fuel oil, thereby enabling the national utility company Senelec to lower electricity prices.

Plans for universal electricity access are a fundamental pillar of Senegal’s PSE, and as such are considered a government priority. President Sall has sought to fast-track progress by organising various donor roundtables, with a view to mobilising over USD 1.3 billion for the development of rural and peri-urban electrification projects. On top of this, the World Bank has pledged USD 300 million for electrification projects, with discussions concerning further investments.

Despite this commitment, the plan faces numerous hurdles. Only 33% of rural households currently have access to electricity, and it remains too expensive for most households to connect to a centralised grid. It is also expected to take many years to construct the required transmission infrastructure to fully cater to rural dwellers, particularly given the historical indebtedness of energy utility Senelec. An additional challenge is Senegal’s lack of robust regulation to facilitate the connection of rural regions to the national grid. The government is seeking to overcome these hurdles by adopting a multi-pronged approach utilising renewable energy and microgrids to reduce costs. Nevertheless, the 2025 deadline remains highly ambitious, and the government will require considerably more funding to accelerate electrification in rural areas.

Renewable energy plans

The government envisages an important role for renewables in its electrification plans. In 2015, renewable energy accounted for only 0.4% of Senegal’s energy mix, but by 2018, this had increased to 12%, and the government aims to reach 30% by 2030. In 2016, President Sall inaugurated the largest solar power plant in West Africa – Senergy 2. Based in the northern Dagana department, Senergy 2 has a capacity of 20 MW and aims to reach over 160,000 people. In February 2020, Sall launched the Taiba N’Diaye wind farm, the first large-scale wind farm in West Africa, which on completion will supply almost a sixth of Senegal’s power. In

November 2021, Senegal joined the Global Coal to Clean Power Transition Statement, pledging to phase out use of coal by the 2040s.

At present, the government's renewable energy goals are highly ambitious, but possible; the prices of solar PV energy, which will constitute a large proportion of the proposed energy mix, have been in constant decline in the last decade. The pandemic has seen solar energy prices continue to plummet across all markets, including residential, non-residential and utility. This is in part owing to falling hardware costs, the oversupply of modules due to ramped up production in China, and decreases in energy demand resulting from global lockdowns. The Senegalese government is poised to exploit this trend, and the government's strong track record with international donors should facilitate easy access to further financing for renewable projects.

However, the government's overall energy plans will continue to be hindered by domestic inadequacies, most notably at Senelec, the state power utility. Senelec is beleaguered by an inefficient structure, weak governance and poor creditworthiness. The utility's over-reliance on government subsidies to reduce electricity prices has resulted in a lack of proactive thought within the organisation as to how to resolve cost issues. Reserve capacity is also insufficient, resulting in frequent outages and high energy costs.

While there is ample space to advocate for renewable energy projects in Senegal, and the government is likely to be receptive to investments in this sphere, these fundamental issues will continue to hinder implementation.

Energy sector reforms and Senelec positioning

The Senegalese government is in the process of restructuring its energy sector with a view to supporting the expansion and regulation of the sector. Senelec, the state-owned utility, had a monopoly over generation, transmission and distribution dating back to 1983. The firm has been plagued by persistent structural issues, including chronic under-investment, corruption, poor governance, high debts and operational issues.

In 2021, the government passed laws to break up Senelec's monopoly and open the sector to greater private investment, with a view to promoting better accountability and governance. As part of the restructure, Senelec will be broken down into several subsidiaries, giving private firms access to transmission and distribution networks. The laws also call for the establishment of a new regulatory body for the energy sector. This agency will be tasked with formulating a new regulatory framework to facilitate the government's plans to reach universal access by 2025.

Despite losing its monopoly, Senelec is a key stakeholder in the national climate change mitigation effort. Senelec still holds a stake in the majority of energy assets in the country, including multiple coal-fired power stations, and will still have a significant say in the identification and implementation of partner projects. There are tentative signs that Senelec is adopting the green agenda; the company willingly allowed the executive to cancel a new coal power station project and is pursuing battery storage solutions to try and keep up with growing renewable energy demand. Senelec therefore remains a key advocacy target for climate actors.

6.3.3 Industrialisation (moderate)

Senegal is one of the most industrialised countries in West Africa, yet the sector accounts for only a small proportion of overall national emissions (around 5%). Government efforts to reduce emissions across industry have been limited to date, and focused on improving energy efficiency and integrating natural gas and renewable energy to serve as the primary generator of energy for industry.

Under the PSE, President Sall hopes to transform Senegal into a continental industrial hub. This is to be achieved through a four-point plan:

- Development of agropoles to promote local agricultural production and reduce reliance on imports;
- Construction of technological and industrial parks to serve as central hubs of innovation;
- Development of small and medium industries;
- Transform Senegal into the region's first reference centre for mining services.

The above industrialisation framework does provide multiple opportunities for climate philanthropy across sectors. The government will be keen to integrate climate-smart and climate-friendly practices into its agricultural production drive, for example. New industrial parks also provide an opportunity to advocate for the use of integrated transport and digital systems to reduce carbon emissions. The government is also keen to streamline sustainable practices into the development of SMEs.

There are still considerable obstacles to these ambitions, including a lack of robust data on the quantity of emissions resulting from different industrial sectors, and a weak enabling environment for the adoption of climate-friendly policies in private companies. These obstacles, however, also provide opportunities for engagement with government to drive the development of higher-quality emissions monitoring systems and for business policies that will encourage companies to go green.

6.3.4 Land use change (moderate)

The largest contributors to GHG emissions in Senegal are the agriculture and forestry sectors, which collectively account for over half of total emissions. The activities driving emissions in these sectors are:

- **Livestock.** Agriculture is by far the worst culprit, contributing to around 36% of total national emissions. The vast majority of this originates from livestock. The government still has no comprehensive strategy for addressing livestock emissions, but Senegal's NDCs, which call for a reduction of 0.19% in agricultural emissions by 2030, stipulate the need to develop more sustainable livestock farming practices.
- **Rice production.** Substandard practices in the rice sector are also a key cause of emissions. Senegal is one of the largest consumers of rice in West Africa. Local production is undermined by high domestic logistical, processing and energy costs, making Senegal one of the continent's top rice importers. Efforts are now underway to reduce the sector's contribution to emissions on two fronts: by bolstering domestic rice production to reduce reliance on imports and thus emissions associated with shipping; and by helping local farmers to integrate green practices into their rice production. To this end, as part of its "Increasing Energy Efficiency" project, The Global Green Growth Initiative (GGGI) is helping rice farmers in the River Valley to adopt more sustainable usage of compost, fertilisers and seeds to reduce emissions and land degradation, and to mainstream renewable energy in local production systems.

- **Deforestation.** High rates of wood consumption, primarily among small households, have had a detrimental impact on Senegal's forests and have become a key driver of environmental degradation and flooding. The conflict in the Casamance region historically exacerbated the situation by giving rise to a thriving illicit timber trade, undermining government efforts to control deforestation. Nonetheless, the government has placed forests high on the development agenda. Senegal's NDCs call for a reduction in deforestation of 25% by 2030. Under the current environment minister, the government has also pledged to expand the amount of classified forested areas, thus protecting them from logging. Further, in 2019 the government planted 79 million mangrove trees, to protect vital arable land, preserve aquatic habitats and absorb around 500,000 tonnes of carbon over 20 years. Senegal is also one of the leading partners in the regional Great Green Wall project, with former president Abdoulaye Wade having played a key role in formulating this initiative in 2008.

In November 2021, Senegal joined 132 other nations participating in the COP26 conference in signing the Glasgow Leaders' Declaration on Forests and Land Use, indicating continued commitment to address these issues.⁴

6.3.5 Oil and gas sector (moderate)

Senegal became a major petroleum investment destination following the discovery of the Sangomar oil field by Scottish exploration company Cairn Energy in 2014 and multiple large-scale gas discoveries by Kosmos in 2017. The development of Sangomar, which is now operated by Australian independent Woodside, and the Tortue LNG project, managed by BP, promise to transform Senegal into a major petroleum producer.

In 2019, the government overhauled its 1998 Hydrocarbons Sector Code, with a view to increasing state revenues while promoting greater industry transparency, including in offshore licensing. While appetite for Senegalese acreage remains strong, the pandemic has delayed flagship energy projects.

International climate partners fear that the oil and gas sector's growth risks undermining Senegal's promise to reduce emissions by 2030. President Sall's background as a petroleum engineer and former head of national oil company Petrosen, coupled with the state's need to capture the promised petroleum windfall, means that the sector carries greater political and economic clout than the green agenda. The government views its national climate mitigation efforts as commensurate with the development of offshore reserves, since natural gas can displace heavy fuel oil in Senegal's energy mix, reducing GHG emissions. In January 2020, the government adopted a new Gas Code, which lays out a comprehensive legal and regulatory framework for the expansion of natural gas production.

There is also growing recognition in Senegal of the need for greater collaboration between ministries on environmental and climate issues. This year, Senegal hosted the Conference on Sustainable Development, on the theme "Sustainable and Healthy Oil and Gas Development". This conference brought together key domestic and international players in the oil, gas and climate spheres, and reinforced the role of environmental regulators in framing Senegal's growing upstream oil and gas industry. Following the conference, energy minister Aissatou Sophie Gladima stressed the importance of integrating renewable technologies into the country's energy mix, providing some reassurance regarding the levels of political will in Senegal towards diversifying the energy mix.

⁴ Source: [UFCDD](#)

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