

## SECTOR STUDY

### *EDUCATION IN IVORY COAST*



*Photo: Malta Jäger – Jacobs Foundation*

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## Table of contents

<b><u>I. EXECUTIVE SUMMARY AND METHOD.....</u></b>	<b><u>5</u></b>
<b><u>II. HISTORICAL CONTEXT OF EDUCATION IN IVORY COAST.....</u></b>	<b><u>5</u></b>
A. EDUCATIONAL POLICY SINCE INDEPENDENCE.....	5
B. COMPARISON OF IVORY COAST TO SUB-REGION COUNTRIES IN THE EDUCATION SECTOR.....	7
<b><u>III. CURRENT EDUCATIONAL SYSTEM .....</u></b>	<b><u>9</u></b>
A. SEGMENTATION OF STUDENT EDUCATION BY LEVEL.....	9
B. TRAINING & DISTRIBUTION OF INSTRUCTORS.....	10
C. SIZE OF MARKET .....	11
<b><u>IV. MANAGEMENT OF EDUCATIONAL SYSTEM.....</u></b>	<b><u>13</u></b>
A. GOVERNANCE: RESPONSIBLE MINISTRIES .....	14
B. BUDGETS AND EXPENDITURES FOR EDUCATION .....	14
<b><u>V. PRESCHOOL .....</u></b>	<b><u>15</u></b>
<b><u>VI. ELEMENTARY EDUCATION .....</u></b>	<b><u>17</u></b>
<b><u>VII. GENERAL SECONDARY EDUCATION.....</u></b>	<b><u>20</u></b>
A. THE FIRST CYCLE.....	20
B. SECOND CYCLE .....	21
C. STATE SUBSIDIES TO GENERAL & TECHNICAL SECONDARY EDUCATION IN THE PRIVATE SECTOR.....	22
<b><u>VIII. TECHNICAL EDUCATION &amp; VOCATIONAL TRAINING (SECONDARY).....</u></b>	<b><u>22</u></b>
<b><u>IX. HIGHER EDUCATION .....</u></b>	<b><u>23</u></b>
<b><u>X. POST-INSTITUTIONAL PROFESSIONAL TRAINING .....</u></b>	<b><u>25</u></b>
A. THE VOCATIONAL TRAINING MARKET.....	25
B. PROFESSIONAL TRAINING PLAYERS .....	25
<b><u>XI. GENERAL POINTS AT VARIOUS LEVELS OF EDUCATION .....</u></b>	<b><u>27</u></b>
A. OUT-OF-SCHOOL CHILDREN .....	27
B. URBAN/RURAL DIFFERENCES .....	27
C. ACCESS TO EDUCATION FOR WOMEN.....	28
D. PREGNANCY IN SCHOOL AGE GIRLS.....	28
E. VIOLENCE AGAINST CHILDREN.....	28
F. INFRASTRUCTURE AND TEXTBOOKS .....	28
G. TEACHER SALARIES .....	28
<b><u>XII. LITERACY .....</u></b>	<b><u>29</u></b>
<b><u>XIII. INNOVATIONS: "EDTECH" IN IVORY COAST .....</u></b>	<b><u>30</u></b>
<b><u>XIV. OTHER PLAYERS IN THE IVOIRIAN EDUCATIONAL SYSTEM .....</u></b>	<b><u>33</u></b>
A. PUBLISHING HOUSES AND PRINTERS .....	33
B. BOOKSTORES .....	35
C. ORGANIZATIONS ADVOCATING FOR EDUCATION.....	35
<b><u>XV. REPORT ON THE EDUCATION SECTOR IN THE IVORY COAST: SWOT ANALYSIS.....</u></b>	<b><u>37</u></b>
<b><u>XVI. OPPORTUNITES FOR ACTION IN THE EDUCATION SECTOR.....</u></b>	<b><u>39</u></b>
<b><u>XVII. INVESTMENT OPPORTUNITIES FOR A PRIVATE EQUITY FUND.....</u></b>	<b><u>39</u></b>



## ABBREVIATIONS

<b>BEP</b>	Brevet d'Etudes Professionnelles [Certificate of Professional Competence]
<b>BEPC</b>	Brevet d'Etudes du Premier Cycle [First Cycle Certificate of Professional Competence]
<b>BTS</b>	Brevet de Technicien Supérieur [Senior Technician Certificate]
<b>CAFOP</b>	Leadership and Teacher Training Centers
<b>CEDEAO</b>	Economic Community of West African States
<b>CEPE</b>	Certificat d'Etudes Primaires Élémentaires [Primary School Certificate]
<b>ENS</b>	École Normale Supérieure [Advanced Teachers' Training College]
<b>INFAS</b>	Instituts Nationaux de Formation des Agents de Santé [National Institutes for Training Health Agents]
<b>INFS</b>	Institut National de Formation Sociale [National Institute for Social training]
<b>INJS</b>	Institut National de la Jeunesse et des Sports [National Institute for Youth and Sports]
<b>INSAAC</b>	Institut National des Arts et de l'Action Culturelle [National Institute of Arts and Cultural Action]
<b>IPNETP</b>	Institut Pédagogique National de l'Enseignement Technique et Professionnel [National Institute for Technical and Professional Teaching]
<b>MEN</b>	Ministère de l'Enseignement National [Ministry of National Education]
<b>MEMEASP</b>	Ministères de l'Emploi, des Affaires Sociales et de la Formation Professionnelle [Ministry of Employment, Social Affairs and Professional Training]
<b>MESRS</b>	Ministry of Higher Education and Scientific Research
<b>MENET</b>	Ministère de l'Enseignement National et de l'Enseignement Technique [National Ministry of Education and Technical Education]
<b>MENETFP</b>	Ministère de l'Enseignement National et de l'Enseignement Technique et de la Formation Professionnelle [National Ministry of Education, Technical Education and Professional Training]
<b>MPJEJSC</b>	Ministry for Youth Development, Youth Employment and Civic Service
<b>N.D. [N.A.]</b>	[Not available]
<b>PND</b>	National Development Plan

## I. EXECUTIVE SUMMARY AND METHOD

The report is a summary of the current status of the Ivory Coast Education Sector. It also covers the main areas of the country's educational sector point by point, both descriptively and analytically. In conclusion, through the various strengths and weaknesses of the sector, several opportunities for action and investments are presented from the perspective of the private sector. In fact, while the country has made considerable efforts since its recovery from the 2011 crisis, education in Ivory Coast remains behind other countries of the sub-region, and even of the sub-Saharan Africa.

This report is based both on resources available and published on Internet, and on the experience of Comoé Capital through the Education Impact Fund managed by that company. The lack of published data does however limit the depth of this sector study. Moreover, it should be noted that several of the sources used come from state sources, which may call the published data into question.

## II. HISTORICAL CONTEXT OF EDUCATION IN IVORY COAST

### A. Educational policy since independence

#### a) From independence to the 2011 economic crisis

Until the 2000's, Ivory Coast was considered one of the educational cornerstones of West Africa. Nonetheless, insecurity in several of the country's regions, along with political and social demands, severely affected the country between 2009 and 2011, driving educational quality to deteriorate, and even leading to the closure of a large number of institutions. For example, the average French and mathematics score dropped from 45% in 1996 to 30% in 2009 (World Bank, 2017).

#### b) Since the 2011 economic crisis

Significant efforts have been noted since 2010 in the desire to return Ivory Coast's educational potential to what it used to be. So the 2010 budget allocation to the education sector increased by 7.5% annually<sup>1</sup>, making it possible to build new classrooms (+ 9,000 elementary school classrooms, and 3,500 secondary ones) and to hire new teachers (+ 20,000 for elementary school and + 6,000 for secondary school). However, while the situation continues to improve, the country's overall social indicators remain meager, especially in terms of education, explaining its place as 171st out of 187 countries in terms of human development in 2017, even though the country had managed to reach 129th place in 2000. The current results, such as a 7.7 years educational experience compared to an average of 9.7 years in Africa, even though the government devoted around 5% of its GDP at education in 2015, a much greater ratio than the African average, which calls into question the effectiveness and sufficiency of the implemented reforms (World Bank, 2017).

#### c) Recent reforms in the educational sector of Ivory Coast

Since the end of the economic crisis, the government's intention to fix the problems in the Ivory Coast's educational sector has led to a series of reforms:

- In 2012, as a result of the regional context, the LMD (Licence-Master-Doctorate) system was implemented to bring higher education offerings in harmony with the international ones, rather than remaining on the sidelines of other countries. While the reform has taken place, following the 2007 UEMOA directive, implementing it in Ivory Coast dragged its heels, mainly due to the economic crisis the country underwent, which led to the closing of universities (Government of Ivory Coast, 2016).
- Since the 2012/2013 school year started, 6th level admission threshold has fallen. In fact, every year, a commission used to limit itself to passing only students who met the admission conditions established by the MENET due to a lack of admission procedures. This meant that the admission cutoff severely limited access to education beyond the last year of the elementary cycle. In other words, the guidance bar has been summer lowered for everyone to pass out of the CEPE to automatically move up to 6th level (the beginning of secondary, first cycle). Lowering this threshold has led to a significant increase in the demand for secondary. So public-private partnerships serve to remedy an excessive demand relative to available public seats (Government of Ivory Coast, 2016).

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<sup>1</sup> Constant Value

- Since the start of the 2015/2016 school year, education became mandatory for children between 6 and 16 years old, to fix the strong inequalities in the country in terms to access in school (Government of Ivory Coast, 2016).
- 2015 also brought many reforms, particularly after the education budget was increased (World Bank, 2017). The various reforms led to the implementation of:
  - An Interministerial Educational/Training Sector Coordination Committee;
  - A technical unit for coordinating and monitoring the policies and strategic planning of the education/training sector;
  - An enhanced evaluation of policies and outcomes achieved by reinforcing the General Inspection of National Education;
  - The implementing reforms within the Leadership and Teacher Training Centers (CAFOP): teacher training benchmarks and strengthened governance.

#### d) PND 2016-2020

In order to counting as one of the countries having achieved emergence by 2020, the government of Ivory Coast has, since 2012, adopted two successive "National Development Plans" (PND). The first, set up to last five years, covered 2012 to 2016. Following-up on the first one, a second PND was set up for 2016 to 2020, focusing, in particular, on the education sector. The respective goals and action plans are the following (MPD, 2016):

- *(i) All school age children & youth attend schools that provide quality teaching and satisfy national standards.*
  - School governance reinforced by medium term (3 years) development plans, respecting the sector's national priorities;
  - Early childhood education improved by enriching the curriculum and renovating existing preschool facilities;
  - Inclusive, quality, universal elementary education thanks to the application of the law that makes education compulsory for 6 to 16 year olds, and the one making school free until elementary school;
  - Teaching girls and keeping them in the education system by building 8 secondary boarding schools for girls;
  - Developing general Secondary Education and technical teaching facilities by setting up new facilities (construction of 816 lower secondary schools, 20 upper secondary schools and 8 secondary technical schools) and the renovation of the current facilities (483 institutions renovated). Some 9,000 instructors will be recruited to staff general secondary education, and 153 for technical secondary schools;
  - Civic education will be strengthened by reinforcing the content and training of the trainers;
  - Educational quality will also be buttressed by:
    - Improving the training of trainers (through studies) in order to improve the content of the training and identify optimal length;
    - Setting up a system for certifying private school teaching competencies at all levels;
    - Certifying technical competencies acquired in the informal sector.
- *(ii) Men and women have equitable access to quality professional training.*
  - The framework of professional training governance is improved through: partnerships with the private sector, organizing concessions of training leading to the Brevet de Technicien Supérieur [Senior Technician Certificate] in the private sector, and will foster a culture of quality professional training;
  - Professional training structures are reinforced (renovating 17 centers and building 10 regional branches, 4 Mining Agriculture, Transportation and Automotive centers, and 6 Implementation and Production Workshops);
  - Capabilities and human resources in the professional training sector are reinforced;
  - Innovative tools are acquired for professional training.
- *(iii) People know how to read, write and do arithmetic.*
  - Integration of informal structures into the educational system by reducing bridge classes and restructuring and modernizing of Muslim schools and community schools.
  - Reinforcing the literacy sector by creating literacy centers in rural areas, and intensifying adult education, particularly for women.
- *(iv) Access to quality higher education is strengthened.*

- Improving sector governance by revising the legal and institutional framework along with implementing with a monitoring-evaluation system for the sector;
- Strengthening of entry level capabilities, particularly in the Man, Bondoukou, Adiaké and San Pedro regions;
- Improving the employability of graduates by adapting the curricula to private sector demands and strengthening the use of teaching ICT's.
- Improving the social and environmental climate at universities and professional schools by doing consciousness raising.

It is on the basis of assorted goals and action plans that the 2016-2025 Education/Training Sector Plan (MENETFP, 2017)<sup>2</sup> was drawn up.

## **B. Comparison of Ivory Coast to sub-region countries in the education sector**

As previously mentioned, in spite of the Ivorian State's efforts in terms of the financial provisions and various reforms implemented, in its latest report, the World Bank (2017) shows that these efforts remain insufficient or inappropriate. In fact, in terms of education, Ivory Coast remains around 25 years behind *vis-a-vis* Thailand, and continues to perform below the sub-region countries.

Grades in Ivory Coast remain below those earned in most African countries. The latest PASEC (Program for the Analysis of Education Systems in CONFEMEN) survey demonstrates that while elementary school outcomes in French come close to average for Francophone African countries, the mathematics ones are still among the lowest. With a score of 476, the country stands well below Senegal, Burundi and Burkina Faso, Cameroon, Benin, Togo and the Congo. As for the outcomes of secondary examinations, they are average for Francophone countries in the region, but are still very weak relative to countries such as France.

The efficiency of Ivory Coast's educational system is still quite weak in spite of the progress that has been made: Ivory Coast only provides 1.6 years of schooling for 1 percentage point of GDP spent, in contrast to an average of 2.7 years for all of the developing countries.

The level of educational life expectancy remains low (7.7 years) compared to an average of 9.7 years in Africa (including the repeated year rate)<sup>3</sup>.

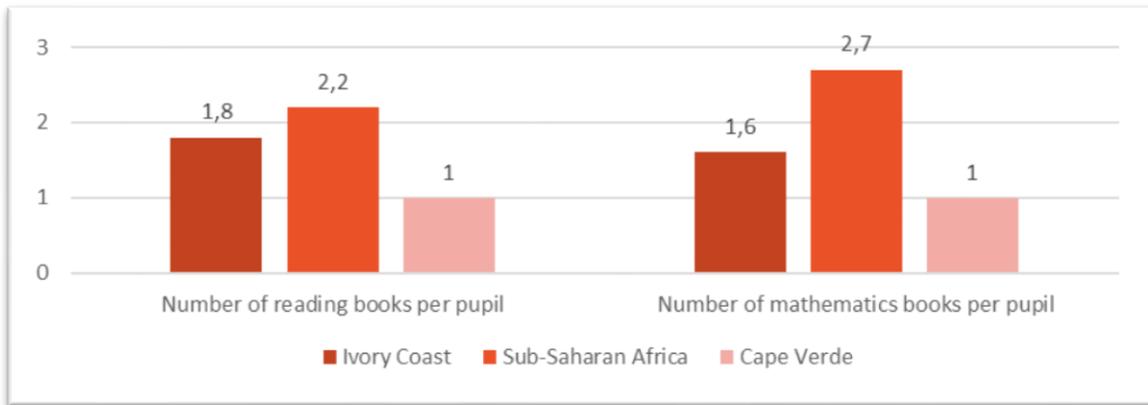
Completion rates at both elementary and secondary school levels remain lower than both middle-income countries and African averages. The elementary school completion rate is 63.1%, as opposed to 72.6% in Africa and 92.8% in middle-income countries. The secondary completion rate is 35% in the Ivory Coast while it is 45% on average in Africa and 75% in middle-income countries.

Ivory Coast schools lack infrastructure and their students lack textbooks. In fact, even though expenditures on educational goods and equipment represent around 20% in efficient countries such as Cape Verde and Thailand, this figure only amount to 5% in Ivory Coast, even though it remains above the sub-Saharan average. The following graph also shows that while Ivory Coast is above the sub-Saharan average in terms of access to electrification for primary schools, it does not apply to access to potable water or restrooms.

*Chart 1: Comparing access to reading materials across Ivory Coast, Sub-Saharan Africa and Cap Verde*

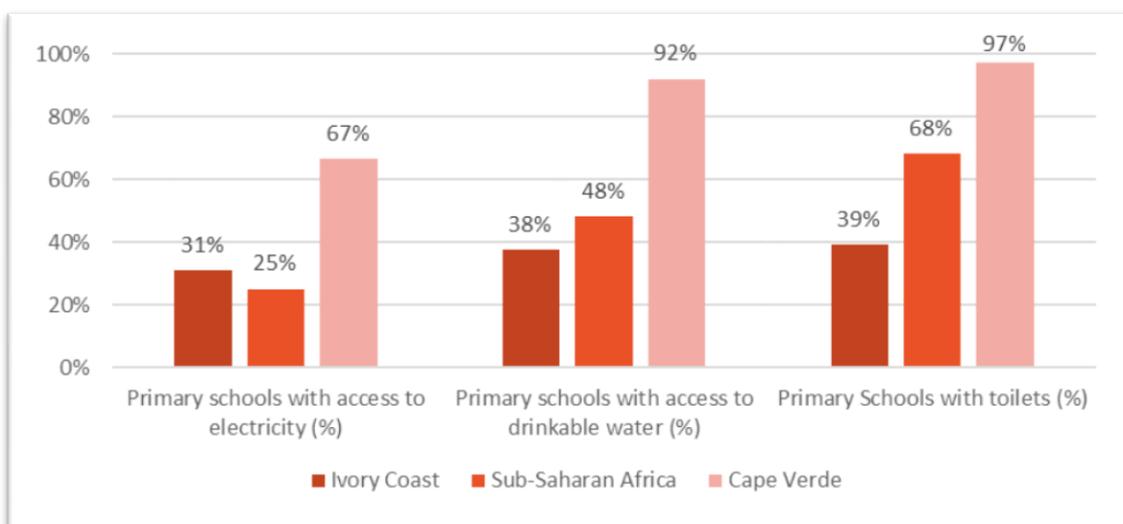
<sup>2</sup> Document available online in PDF format.

<sup>3</sup> The World Bank's report stresses nevertheless that certain factors explaining this low rate are exogenous to the educational system, such as the weak ratio between active individuals who are able to pay for their children's education and the school-age population.



Source: World Bank, 2017

Chart 2 : Comparing schools basic needs across Ivory Coast, Sub-Saharan Africa and Cap Verde



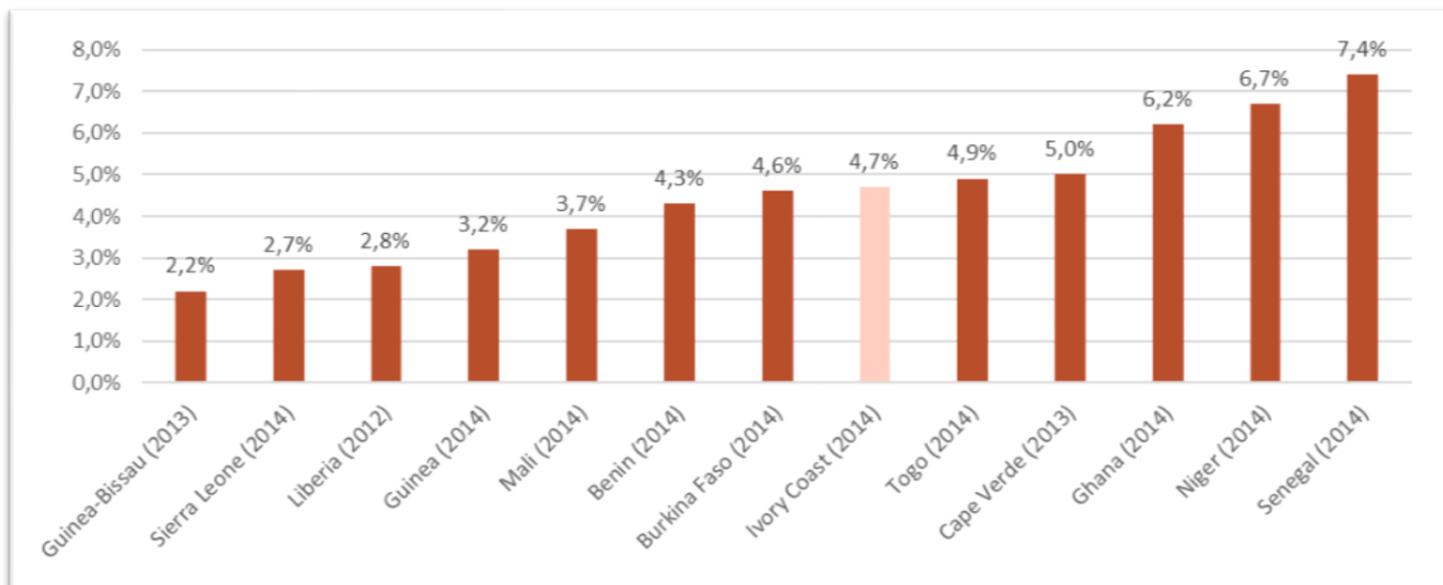
Source: World Bank, 2017

Paradoxically, in 2013, public educational expenditures (% GDP) represented 4.7%, placing Ivory Coast among sub-regional countries investing the most in their education system, compared to other CEDEAO countries. The same trend is revealed when we look at current CIV educational expenditures (29.5% in 2013) as opposed to an average of 24.5% for CEDEAO countries (World Bank, 2018; Government of Ivory Coast, 2016).

Chart 3: Part of CEDEAO government expenditures on education as a percentage from GDP (2014<sup>4</sup>)<sup>5</sup>

<sup>4</sup> 2014 or last available year, see parentheses.

<sup>5</sup> Data not available for Nigeria.



Source: World Bank, 2017

### III. CURRENT EDUCATIONAL SYSTEM

#### A. Segmentation of student education by level

See below the different levels of the Ivory Coast current educational system:

- **Preschool education** (3 to 5 year-olds):
  - o Optional
  - o Makes it possible to prepare children for the elementary cycle
  - o Three sections:
    - The Petite Section (SP) [2 to three year-olds]
    - The Moyenne Section (MS) [4 year-olds]
    - The Grande Section (GS) [5 year-olds]
- **The elementary cycle** (6 to 11 year-olds):
  - o Length: 6 years
  - o It is organized in three sub-cycles
    - Preparatory stages CP1 & CP2
    - Elementary levels CE1 & CE2
    - Intermediary levels CM1 & CM2
  - o This cycle leads to the "Certificat d'Etudes Primaires Élémentaires [Primary School Certificate]" (CEPE), to pass to the 1st secondary cycle (general or professional)
- **Secondary cycle**
  - o **First cycle of secondary & technical teaching:**
    - Length: 4 years
      - General curriculum (lower secondary school): certified by the Brevet d'Etudes du Premier Cycle [First Cycle Certificate] (BEPC) at the end of the 3rd year (last year of cycle);
      - Vocational/Technical Curriculum: by the end of the 5th year (second year of cycle), students can enroll in professional track and continue their studies in Vocational Training Centers (CFP) or in Technical Colleges (CET). The end of studies in these institutions is certified by obtaining a Certificate of Professional Competence (CAP) or a Professional Certificate (BP or BEP).
  - o **Second cycle of secondary general & technical education cycle:**
    - Length: 3 years (specialization at the end of the first year)
    - General Education:
      - Certified by the Baccalaureate
      - Specializations: (A) Literary, (C) Scientific, predominantly Mathematics & Sc. Physical and (D) Scientific predominantly Life and Earth Sciences (S.V.T.)

- Vocational & Technical Education:
  - Certified by the industrial and commercial Brevet de Technicien (BT) [Technician Certificate] and the Brevet de Technicien Supérieur [Senior Technician Certificate].
  - Commercial specializations (B), (G1), (G2,) and industrial specializations (E, F1, F2, F3, F4 and F7).
  - Preparation for these diplomas takes place in Technical Secondary Schools (LT), Vocational Secondary Schools (LP) and Work Force Development Centers (CPM).
- Art Schools
  - Train students for the H1 art baccalaureate (Plastic Arts), H2 (Music) and H3 (Theater) and the Certificate of Applied Arts (BTAA).
- **Higher Education**
  - Length: 2 to 8 years
  - Academic and professional education
    - Academic education:
      - The L-M-D (Licence-Masters-Doctorate) is an international common standard for all higher education areas so diplomas can be internationalized.
      - LMD System introduced in 2012:
        - Licence degree = Bac +3;
        - Master's degree = Bac + 5 (must have completed a licence to earn a master's degree);
        - Doctoral degree = Bac + 8 (must have completed a master to earn a doctoral degree).
    - Vocational education: mainly provided by the private sector

## **B. Training & distribution of instructors**

### a) Training of instructors in the public system

Instructor training takes place in specialized institutions (Sehi & Mian, 2015).

- **Centres d'Aptitude et de Formation Pédagogique [Leadership and Teacher Training Centers] (CAFOP)**, train teachers for public preschool and elementary school. Currently, Ivory Coast has some fifteen of CAFOP centers.
- **École Normale Supérieure [Advanced Teachers' Training College] (ENS)** of Abidjan trains teachers for general public secondary schools for all disciplines other than sports, the plastic arts and music, as well as CAFOP trainers.
- **Institut National de la Jeunesse et des Sports [National Institute for Youth and Sports] (INJS)** trains general public secondary sports teachers.
- **Institut National des Arts et de l'Action Culturelle [National Institute of Arts and Cultural Action] (INSAAC)** trains general public secondary education plastic arts and music teachers.
- **Institut Pédagogique National de l'Enseignement Technique et Professionnel [National Institute for Technical and Professional Teaching] (IPNETP)**, trains public technology education trainers.

### b) Distribution of elementary school teachers

Based on the study by the Government of Ivory Coast (2016), the degree of unforeseen events in the distribution of public elementary school teachers in the Ivory Coast remains too high, with a 43% rate, as opposed to a rate of 13% in some neighboring countries. These statistics highlight the lack of consideration vis-à-vis the needs of the different schools, as well as the number of teachers already on board relative to student numbers.

### c) Distribution of secondary teachers

As opposed to elementary school, the distribution of public secondary teachers is depending on the subjects taught and the number of hours scheduled for each educational level. However, the surveys show that lower secondary school teachers teach 14 hours a week as opposed to a planned average of 21 hours, and upper

secondary school teachers teach 12 hours per week on average, as opposed to a planned average of 18 hours (Government of Ivory Coast, 2016). Nonetheless, working in one or several private schools in addition to a public school job seems to be a common practice in the Ivory Coast teaching environment<sup>6</sup>.

d) Training instructors in the private system

In spite of a lack of documentation on how teacher training works in the private system, Comoé Capital's experience shows that private school teachers are either students with a certain level of education (in general, a master's degree), with specific competencies in the subject being taught, or else are public school teachers who teach additional classes (majority of the time). However, public school teachers cannot file returns for their private job because a public school teacher can only teach in the private system if he or she has resigned. School social practices must therefore be analyzed during the due diligence on schools.

In fact, to date, there appears to be no training program center for private system teachers.

One of the main issues arising from this system is that every year, a limited number of teachers are trained. However, the number of trained teachers only happens when there is a need for public school teachers, and therefore does not take into account the need for private school teaching.

C. Size of market

a) School-age Population

The following table lists the Ivory Coast's 2015 school-age population. The total school-age population in the Ivory Coast is estimated to be 9 million of children and youth.

Table 1: School-age population in Ivory Coast in 2015

Age & Age group	Equivalent education level	Boys	Girls	Total
Age 3	PS	348 776	324 794	673 570
<b>Total age 3 to 5</b>	<b>Preschool</b>	<b>1 023 021</b>	<b>952 676</b>	<b>1 975 697</b>
Age 6	CP1	325 815	303 412	629 227
Age 11	CM2	290 857	279 857	570 714
<b>Total age 6 to 11</b>	<b>Primary</b>	<b>1 848 429</b>	<b>1 721 329</b>	<b>3 569 758</b>
Age 12	6th	284 328	264 778	549 106
Age 15	3rd	265 610	247 347	512 957
<b>Total age 12 to 15</b>	<b>Secondary 1st Cycle</b>	<b>1 099 595</b>	<b>1 023 985</b>	<b>2 123 580</b>
Age 16	Second	259 649	241 795	501 444
Age 18	Terminal	248 124	231 063	479 187
<b>Total age 16 to 18</b>	<b>Secondary 2nd Cycle</b>	<b>761 595</b>	<b>709 227</b>	<b>1 470 822</b>
<b>Total age 3 to 18</b>	<b>all aggregated</b>	<b>4 732 640</b>	<b>4 407 217</b>	<b>9 139 857</b>

Source : MENETFP, 2017

b) School population

According to the various studies performed by the Government of Ivory Coast and the National Ministry of Education, Technical Education and Vocational Training (MENETFP) (2017), this is the number of school-age students by level:

Table 2: School population in Ivory Coast

<sup>6</sup> Source: Comoé Capital experience

	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016
PRESCHOOL	74 709	91 393	113 309	126 218	144 128	161 696
ELEMENTARY	2 704 458	2 920 791	3 021 417	3 176 964	3 370 558	3 617 219
Secondary 1st Cycle	748 520	801 019	896 152	1 005 991	1 126 919	1 237 030
Secondary 2nd Cycle	378 315	331 445	319 520	315 565	352 086	384 844
Vocational training	48 813	59 328	84 594	102 272	Not available	Not available
Higher Education	66 237	80 837	170 928	176 437	Not available	Not available

Source: Government of Ivory Coast. 2016

For more details, see appendix I.

In order to obtain a more or less realistic order of magnitude of the potential market, compared to current market, it is also interesting to look at the 2013/2014 rate of school enrollment at various academic levels. The UNESCO Institute for Statistics allows us to see changes in the Raw Rate of School Enrollment<sup>7</sup> at these various levels<sup>8</sup>:

Chart 4: Raw rate of Preschool Enrollment Rate in Ivory Coast (%)

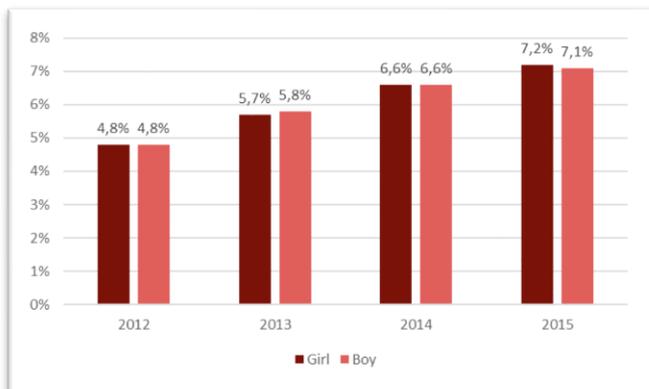


Chart 5: Raw rate of elementary Enrollment Rate in Ivory Coast (%)

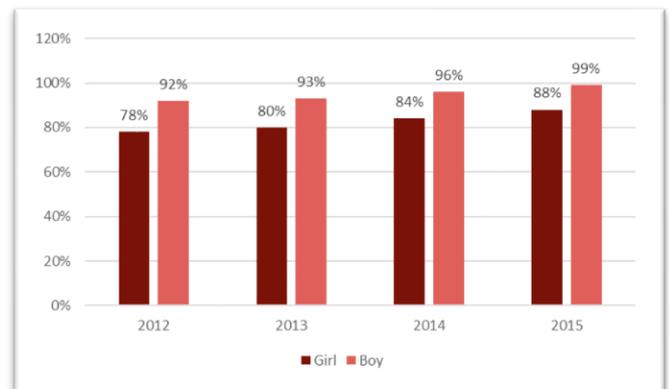
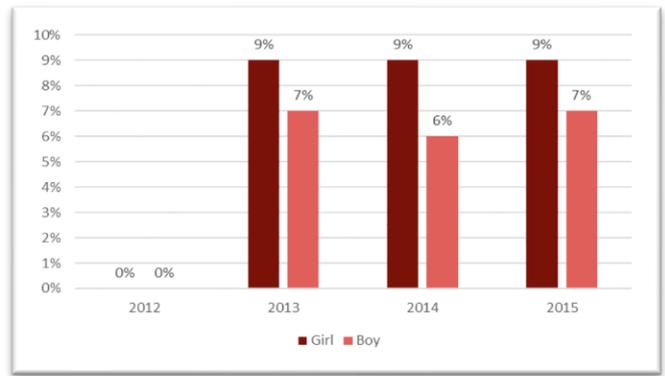
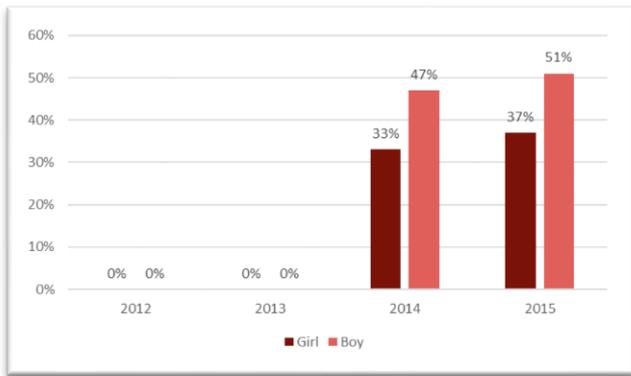


Chart 6: Raw rate of Secondary Enrollment in Ivory Coast (%)

Chart 7: Raw rate of Higher Education Enrollment in Ivory Coast (%)

<sup>7</sup> According to UNESCO, the Raw Rate of School Enrollment is defined as the “number of students in school at a given level of teaching, no matter their age, expressed as a percentage of the population in the theoretical age bracket corresponding to that teaching level. For higher education, the population used is the five consecutive years one, starting at the secondary level age of graduation”. It is important to note that this rate exceed 100% when over-age and under-age students, along with repeating students, are included.

<sup>8</sup> The net rate of school enrollment was not available.



Source: UNESCO Institute for Statistics, 2017

The various statistics highlight the very low rate of enrollment at the preschool level, as well as weaknesses at the secondary and higher education levels. In 2015, around 7% was obtained for preschool; 88% for girls and 99% for boys in elementary school; 37% for girls and 51% for boys in secondary school; And finally, 9% for girls and 7% for boys at the higher education level.

By way of comparison, in 2015, the raw school enrollment rates (done on the basis of an average between the girls' and boys' rates) in Ghana and in Cameroon were the following (UNESCO Institute for Statistics, 2015) :

Table 3: Raw rates of school enrollment in Ivory Coast, Ghana and Cameroon

	Ivory Coast	Ghana	Cameroon
Preschool	7%	120%	38%
Elementary	93%	110%	117%
Secondary	44%	61%	58%
Higher Ed	9%	16%	17%

Source : UNESCO Institute for Statistics, 2017

Moreover, there is almost no national policy for early childhood (children 0 to 3 years old). This policy also remains very rare. As mentioned below, only 30% of preschool education is provided by public schools.

#### c) Infrastructure by grade level

The following table lists the number of schools and physical classrooms during 2015-2016.

Table 4: Infrastructure of Ivory Coast's educational system in 2015-2016

	Number of schools	Number of Classrooms
Preschool	2 223	5 668
Elementary	15 547	8 473
Secondary	1 479	28 357
Total	19 249	118 755

Source : MENETFP, 2017

## IV. MANAGEMENT OF EDUCATIONAL SYSTEM

## **A. Governance: responsible ministries**

There have been several ministerial changes related to education over recent years. Between 2012 and January 2016, education budgets were principally distributed among three ministries

- The National Ministry of Education and Technical Education (MENET)
- The Ministries of Employment, Social Affairs and Vocational Training (MEMEASP)
- The Ministry of Higher Education and Scientific Research (MESRS)

Since January 2016, a ministerial reorganization distributed educational competencies over the following ministries:

- The National Ministry of Education (MEN)
- The Ministry of Technical Education and Vocational Training (METFP)
- The Ministry of Higher Education and Scientific Research (MESRS)

In January 2017, there was another ministerial change. Here are the current ministries in charge of education (Jeune Afrique, 2017):

- The National Ministry of Education, Technical Education and Vocational Training (MENETFP)
  - Minister: Ms. Kandia Kamissoko Camara
  - With Mr. Mamadou Touré, serving as Secretary of State in charge of Technical Education and Vocational Training
- The Ministry of Higher Education and Scientific Research (MESRS)
  - Minister: Ramata Ly-Bakayoko

Along with the following two ministries, whose role is less direct but nevertheless closely linked to the education of youth:

- Ministry for Women, Children and Solidarity (MFPE)
  - Minister: Mariatou Koné
  - Contributes to education parental for children not yet old enough for preschool
  - Has Early Childhood Welfare Centers (CPPE)
  - Has Training and Female Education (IFE) Institutions
- The Ministry for Youth Development, Youth Employment and Civic Service (MPJEJSC) (MPJEJSC, 2017):
  - Minister: Sidi Tiémoko Touré
  - Role: Directorate for the Protection of Youth, directly linked to the education sector
    - Design and implement education plans to continue training and developing unschooled youth and school dropouts;
    - Provide continuing teaching staff training
    - Make sure youth life is improving socially; intellectual, cultural and psychological.
    - Head Community life and Youth Empowerment
    - Head Civic Service and Volunteer Work

Apart from the ministries, there are several other departments working in the area of education and training to varying degrees:

- The Ministry of Health and Combating AIDS, with the National Institutes for Training Health Agents] (INFAS) under its supervision The Training of the Agents of Health (INFAS);
- The National Institute for Social training (INFS), a public institution, with an administrative function, but financially self-sufficient, in particular providing training for Specialized Educators or Preschool Educators;
- The Ministry of Sports and Recreation, with the National Institute for Youth and Sports] (INJS) under its supervision;
- The Ministry of Culture and Francophonie, with under its supervision the Institut National Supérieur des Arts et de l'Action Culturelle (INSAAC), the Institut National Supérieur des Arts et de l'Action Culturelle;
- The Ministry of Agriculture, with under its supervision the Private Institute of Tropical Agriculture (INPRAT);

## **B. Budgets and expenditures for education**

The following chart breaks down the budget allocated to each level of education for 2015, along with the estimates for the following years, on the basis of the Education/Training Sector Plan 2016-2025 established by the corresponding ministries (MENETFP, 2017). Note an increase within all of the categories, with the exception of the 2nd cycle of secondary education. The early childhood, literacy, elementary school sectors, along with technical education and vocational training, are identified as priorities, with budgets which should at the very least double for the period.

Table 5: Resources for current expenditures by education level (millions CFA francs)

Resources for current expenditures by education level (millions CFA francs)	2015	2017	2018	2019	2025
Early childhood	11 794	15 817	18 190	20 849	37 594
Literacy	3 354	8 307	8 744	11 900	18 200
Elementary education	341 489	516 618	533 909	557 947	702 343
Secondary Education 1st cycle	164 185	173 393	184 716	196 107	263 914
Secondary Education 2nd cycle	126 801	114 090	112 175	109 989	78 778
Technical education	13 573	18 030	20 106	22 324	36 021
Vocational training	34 360	48 103	54 891	61 612	136 190
Higher Education and Scientific Research	132 940	140 326	145 684	151 148	170 765
<b>Current sector expenditures</b>	<b>828 496</b>	<b>1 034 684</b>	<b>1 078 415</b>	<b>1 131 876</b>	<b>1 443 805</b>

Source: MENETFP, 2017

The table (below), although it dates from 2013, gives an idea about expenditures per child per one year level, as well as the breakdown of education expenditures between public education and households. In terms of household spending per child by level, note that spending increases by level taught, with a single exception, the preschool one. The reason for higher preschool prices is explained by the mainly private availability of this type of education in Ivory Coast, and also because the parents deciding to enroll their children at that level are generally better off.

In general, household expenditures on education are the following:

- **Direct expenditures**
  - **Payments in school:** registration fees, tuition, (contributions) preschool activities, administrative documents for registering children
  - **Purchases by families:** manuals and school notebooks, supplies, uniform, required sports outfits, other garments
- **Indirect expenditures**
  - **Payments to the school:** other registration fees (i.e.: examinations)
  - **Other expenditures:** tutoring, food, cafeterias, boarding, transportation, etc.
- **Other academic expenditures** (unspecified)

Next, regarding distribution of expenditures, note that the total share of household expenditures is particularly high for secondary education, compared to the other levels.

Table 6: Education sector expenditures in 2013

Education sector expenditures in 2013						
	Preschool	Elementary	Secondary 1st cycle	Secondaire 2nd cycle	EFTP	Higher Ed
Household expenditures per child (CFA francs)	81 783	39 390	104 389	155 292	235 807	386 665
Total household expenditures (millions CFA francs)	8 256	116 681	108 507	55 140	21 984	71 720
Current public education expenditures (millions CFA francs)	13 425	246 695	102 018	79 783	47 657	128 188
Total education expenditures (millions CFA francs)	21 681	363 376	210 525	134 923	69 641	199 908
Total household share of expenditures (%)	38,1%	32,1%	51,5%	40,9%	31,6%	35,9%
Public education share of current expenditures (%)	61,9%	67,9%	48,5%	59,1%	68,4%	64,1%

Source: MENET, 2016

## V. PRESCHOOL

### Staff

While the number of preschool students varies from one study to the next, there is no doubt that preschool student enrollment nonetheless remains very low, at a rate of 7%, and more or less equal between girls and boys. The numbers remain weak, with about 162,000 students for the 2015/2016 educational year, but with an increase in the school enrollment rate of children of that age range, with an annual increase of 20% between 2012 and 2014.

The low rate of enrollment can be explained by a lack of access to infrastructure, particularly in rural areas., along the failure of parents to grasp the importance of this cycle (Government of Ivory Coast, 2016).

There are 3 levels of preschool:

- The Petite Section (SP) representing 22% of students (legal age for admission: 3 years old);
- The Moyenne Section (MS), representing 35% of students (legal age for admission: 4 years old);
- The Grande Section (GS), representing 43% of students (legal age for admission: 5 years old).

### **Tuition Costs**

On average, a preschool child equals around 82,000 CFA francs annually for a family.

### **Teaching**

Overall, around 50% of preschool teachers, whether public, private or community, have the BEPC, 40% have the BAC or above, and 10% do not have anything. Nonetheless, private education statistics are more disappointing, with 23% of teachers no diploma, and only 12% with the BAC or above (MENETFP, 2017).

Public teachers are trained by the National Institute for Social training ([www.infs-ci.org](http://www.infs-ci.org)). While private school teacher qualifications (BAC plus, BAC, BEPC or none) are weaker, teachers at those schools, along with those at schools under the supervision of the Ministry for Child Welfare, would usually receive training specifically focusing on the preschool level. On the other hand, community school teachers are just volunteers, while the public schools rely on elementary school teachers (Government of Ivory Coast, 2016)<sup>9</sup>.

At the level of student-teacher ratio, which is much lower at private schools or those under the supervision of the Ministry for Child Welfare, with an average ratio of 18:1. In public schools, this ratio is 21:1, and 30:1 in community schools (Government of Ivory Coast, 2016). By way of comparison, in 2015, the average for middle-income countries in the lower range<sup>10</sup> is 20:1, and the African one is 30:1, highlighting the good ratio of Ivory Coast (UNESCO, 2018).

In terms of gender, 93% of teachers are women and 88 out of 7,045 are volunteers.

### **Rural/Urban Segmentation**

While preschool education is still rare and often equated with elites, it is also concentrated in urban environments, with only 21% of children attending preschool (and 31% of the institutions) come from rural areas (MENETFP, 2017).

### **Segmentation by institution**

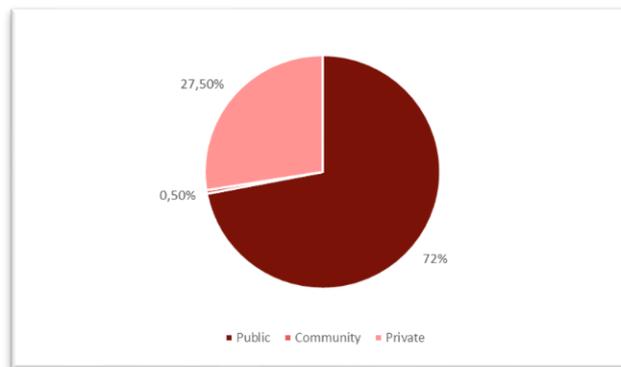
According to the statistics branch, at the start of the 2015-2016 school year preschool in Ivory Coast consisted of 2,223 facilities, with a third of the schools located in Abidjan (698 schools).

In terms of institutional segmentation, private schools play an important role, with a little under 30% of the children attending school in 2015/2016. Public schools hold 72% of the market. The apparition of community offerings since 2008, represents around 0.5% of staff, with a slight drop since 2013/2014. Community education is a type of private education generally funded by religious organizations (schools, churches etc.). The extent of private and community education, compared to elementary school, for example, where public schools represent 85% of the children in school, is justified by a lack of infrastructure, particularly in rural areas (Government of Ivory Coast, 2016).

*Diagram 1: Distribution of students by type of institution within at the Preschool level (2015/2016)*

<sup>9</sup> The statistics in the Report on School Statistics Analyses 2015-2016 show, however, that most public teachers have a teaching diploma (93%) while only 20% do for private schools. The supposition is that this difference can be explained by the fact that training received in the private sector and the schools under the supervision of the Ministry for Early Childhood are not recognized as official diplomas.

<sup>10</sup> UNESCO definition, including Ivory Coast



## Infrastructure

The study done by the ministry in charge of education notes that (MENETFP, 2017):

- 13% of preschool classes are said to be in poor repair<sup>11</sup>, and 8% are built out of temporary materials;
- 50% of the schools do not have a wash basin (36% in the private as opposed to 64% in the public);
- 40% of schools do not have any functioning latrines;
- 14% of schools have a functioning cafeteria;
- +50% of public schools, 77% of community schools and 12% of private schools do not have a water source;
- 43% still lack electricity, with a far greater lack in rural areas;
- The average number of students per classroom is 29, versus a standard of 25.

### Investing in preschool in Ivory Coast (from the perspective of a Comoé Capital type of fund)

Even though preschool is becoming a national priority, the fact remains that the efforts so far have been minimal compared to the challenges. Moreover, the School for All law, rendering school mandatory for 6 to 16 year olds, *de facto* excludes preschool.

But, given the age pyramid in Ivory Coast, it makes perfectly good sense for a fund such as Comoé Capital to invest in preschool. It would nevertheless be a good idea to ascertain a certain number of things:

- **Problems finding teachers:** the training of preschool teachers is handled by a public structure called the Institut National de Formation Sociale [National Institute for Social training.] In fact, this structure does the training for meeting the needs of public institutions, while private preschool educator training is almost entirely done by the institutions themselves. Analyzing the educators' profile is therefore a basic requirement when doing due diligence.
- **Overlooked sub-sector:** Although preschool is officially mandatory, the lack of early childhood structures means that the State very rarely mentions this type of education. Also, for a private structure to serve a significant number of students, it must communicate more frequently than an elementary or junior high school. In fact, the great majority of parents do not know what the role of a preschool institution is.
- **Approval:** During the due diligence phase, the accreditation of the school being studied needs to be ascertained. Moreover, the works used for preschool must be approved. It so happens that very few preschool schools fulfill this rule.

## VI. ELEMENTARY EDUCATION

### Staff

In 2015/2016, some 3,620,000 children were in elementary school in Ivory Coast. A net improvement has been noted since the 2000's. In fact, in 2007 the gross rate of school enrollment was near 70%, while in 2016

<sup>11</sup>Roofs in poor repair, window pulled out, etc.

this rate was estimated at 101%. These numbers improved following a long period of crisis in the country, as well as the government's resoluteness since 2011-2012, when several reforms happened, such as lowering the eligibility threshold, the creation of infrastructures and subsidies for families.

### **Cost to households**

On average, an elementary school child is equivalent to around 40.000 CFA francs annually for a family.

### **Teaching**

The ratio of students to teachers depends on the type of school and is much higher for public education. In fact, even though the average ratio is very high, with a ratio of 42:1, it is 34:1 in community schools, 37:1 in private schools and 43:1 in public schools. By way of comparison, the average ratio for Africa is of 35:1 and that of low-income Countries is 41:1 (UNESCO, 2018).

In terms of qualifications, public school teachers have needed to have at least a baccalaureate ever since 2013.

### **Outcomes**

Regarding grades, the PASEC (2014) study analyzed the grades of students at the beginning and end of their schooling in mathematics and language.

For beginning students, the average scores nationally are 484.1 in languages and 465.9 in mathematics, that is, their grades are lower than those of Burkina Faso, Burundi and Togo in languages, but also lower than those of Senegal and Cameroon in mathematics. Moreover, only 17.3% (languages) and 33.8% (mathematics) of the students achieve the "adequate competencies threshold" as defined by PASEC for admission to elementary school.

At the end of their schooling, the average national scores are 517 in languages and 458 in mathematics, like the average for the countries in the region studied in the study<sup>12</sup> with the exception of Senegal in languages, but still lower than Benin, Burkina Faso, Burundi, Togo and Senegal in mathematics. In total, only 48% (languages) and 27% (mathematics) for students reach the "adequate competencies threshold" as defined by PASEC at the end of elementary school.

However, in 2014, the success rate on the CEPE was, with rate of around 82.2%, twice the proportion of students located falling below the "adequate competencies threshold," thereby calling into question the level of difficulty of the examination, which can then subject students to encounter further difficulties when they start secondary. To remedy these very low outcomes, the 2016-2025 PNE provides for the inclusion of a seventh class at the beginning of elementary education (before the first year, without replacing the last year of nursery school) to prepare the student to start elementary school.

Also, while the student/teacher ratio for Ivory Coast was 43 in 2014, versus an average of 42 in Sub-Saharan Africa, the action plan set up by the Government aims to lower this ratio to 40.

*To get a better grasp of the problems students encounter, see the PASEC study (2014).*

### **Infrastructure**

While 85% of elementary schools are served by public service, the UNESCO Institute for Statistics (2017) nevertheless (2017) decries the lack of infrastructure in this environment, with the following statistics:

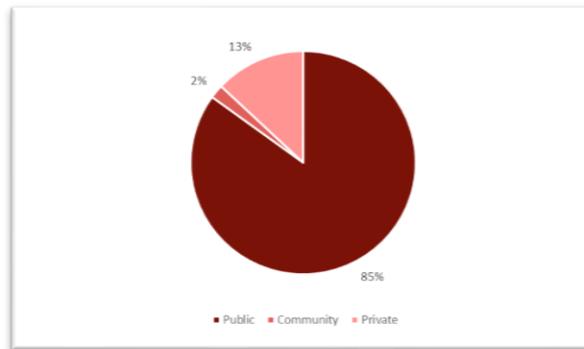
- Around 60% do not have restrooms;
- only 25% have access to electricity;
- Around 50% do not have a source of potable water;
- The average number of students per classroom is 43, versus a standard of 40. This ratio is 45 in the public schools, 36 in private schools, and 28 in community schools.

### **Private-Public-Community Segmentation**

In 2015/2016, 85% of elementary education was dispensed by public schools, 13% by private ones and 2% by community ones. Actual growth is noted at the level of the private sector.

*Diagram 2: Distribution of students by type of institution at the Elementary level (2015/2016)*

<sup>12</sup>Benin, Burkina Faso, Burundi, Cameroon, Congo



### Girl-Boy Segmentation

Regarding access to education by sex, it is estimated that in 2015/2016 47% of the student body was girls versus 53% for boys (MENETFP, 2017).

### Rural/Urban Segmentation

Around 55% of students attending elementary school are from rural areas. However, while private schools educate a quarter of this population in a rural environment, they are only serving 3% in urban areas (MENETFP, 2017).

### Several "specific" figures on Ivory Coast

- 29.6 % students in elementary school do not have a birth certificate and lack any proof of Civil Status to confirm their identity;
- 672 cases of pregnancy among elementary school students;
- 80% of elementary schools do not have an enclosure;
- 6,715 students live with a motor-handicap and 4,660 with a sensory disability and almost no facility is properly adapted to serve them;
- Out of 85,109 teachers, 3,002 are volunteers.

### Investing in elementary school in Ivory Coast (from the perspective of a Comoé Capital type of fund)

Given the low rate of school enrollment and the School for All law, there are attractive elementary education investment opportunities in Ivory Coast. In fact, whether it involves improving the quality of education (high rate of repeated years) or infrastructure (lack schools with a minimum of restrooms), the need is apparent. It would nevertheless be a good idea to ascertain a certain number of things:

- **Problems finding teachers:** elementary school teacher training is handled by a public structure called CAFOP. At the start of the 2015-2016 school year, the country had 16 CAFOP (170 classes) training 5,886 students. In fact, this organization does training to meet the needs of public institutions, while private preschool educator training almost entirely done by the institutions themselves. Analyzing teacher profiles and the contract they are subject to is therefore a fundamental aspect of due diligence.
- **Quality of instruction:** This quality is affected by both teacher quality and the fact that preschool education remains undeveloped. Moreover, a less favorable student-teacher ratio as well as the quality of the teachers (the most qualified teachers mostly teach the upper levels rather than the lower ones), and, lastly, and environment/infrastructure deemed unsuitable. A success rate on the 2015 CEPE of 82.2% is an interesting indicator for evaluating a school's level.
- **Free, high density of public schools:** The density of public schools at the elementary school level, as well as free books for elementary school students (student bodies in several public schools) makes it hard for private structures to compete. However, the general perception of parents is that the level of public instruction is dropping, so private schools stressing the educational quality have a significant competitive advantage.

During the due diligence phase, the **accreditation** of the school being studied needs to be ascertained. Moreover, the works used in elementary schools must be approved.

## VII. GENERAL SECONDARY EDUCATION

In total, in 2015/2016, nearly 1.62 million children were in school at the general secondary level. However, around 75% of these children attended the first cycle of school (lower secondary), versus only 25% for the second cycle (upper secondary).

### **Infrastructure** (UNESCO, 2018)

- Latrines: 97% of private institutions had functioning latrines, as opposed to 69% of public ones;
- Potable water sources: 12% of the private institutions and 27% of the public ones lacked access to a water source;
- Electricity: 84% of the institutions have access to electricity.

### **Student/teacher ratio**

The student/teacher ratio at the secondary level was 26.6:1 in 2015 for Ivory Coast, versus an average of 19:6 in Africa, and 23.4:1 in middle-income countries (lower range)<sup>13</sup> (UNESCO, 2018).

#### A. **The first cycle**

### **Numbers & Outcomes**

With 1.24 million students, the 2015/2016 numbers show an increase near 10% in terms of student bodies compared to the previous school year (MENETFP, 2017 (MENETFP, 2017)).

In 2015/2016, the Brevet d'Etudes du Premier Cycle [First Cycle Certificate of Vocational Competence] (BEPC) success rate was 59%, showing a very slight improvement over the previous year. The 60% success rate stands in the upper range of neighboring countries<sup>14</sup> but nevertheless remains very weak compared to the 89% earned in France in the same year.

### **Cost to households**

On average, a child in the first cycle of secondary education costs a family around 100.000 CFA francs a year.

### **Girl-Boy Segmentation**

Girls only represent 42% of the student body, opposed to 58% for boys (MENETFP, 2017).

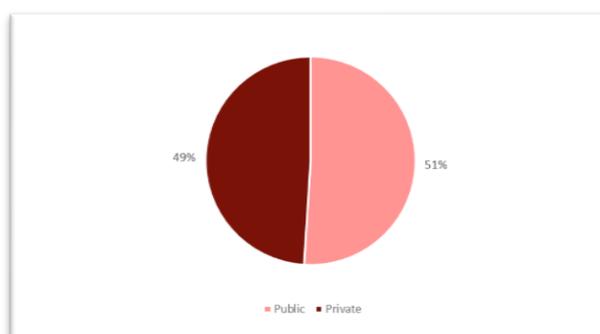
### **Urban-Rural Segmentation**

The attendance rate at urban institutions is close to 96%, versus only 4% for rural ones (MENETFP, 2017).

### **Public Private Segmentation**

In terms of segmentation by type of institution, distribution is more or less similar, with 49% for private schools versus 51% for public ones (Government of Ivory Coast, 2016).

*Diagram 3: Distribution of students by type of institution at the First Cycle of General Secondary level (2015/2016)*



<sup>13</sup> UNESCO definition, including Ivory Coast

<sup>14</sup> Togo: 60%; Senegal 50%; Cameroon 51.5%; Congo 56%

## B. Second cycle

### Numbers & Outcomes

With a growth rate of 9.6% relative to the previous year, a little less than 400.000 students were counted in this cycle. However, less than half of the student body is the age they should be in these classes (between 16 and 18 years old). In fact, while certain students are under age 16 (8.1%), 44.3% of students are 19 or older (MENETFP, 2017).

For the distribution of students by level, see below:

6th	5th	4th	3rd	2 <sup>nd</sup>	1st	Term
23%	19%	16%	18%	9%	7%	8%

In terms of outcomes, the Baccalaureate success rate was 42.39% in 2015/2016, showing a slight advance relative to 40% the previous year, and a significant advance relative to 34% in 2013. This rate is average for Francophone countries in the region but remains very low compared to rates in France<sup>15</sup>.

### Cost to households

On average, a child in the first cycle of secondary education costs a family around 150.000 CFA francs a year (See section 4.8).

### Girl-Boy Segmentation

In the second cycle of General Secondary Education, around 60% of the student body is boys (MENETFP, 2017).

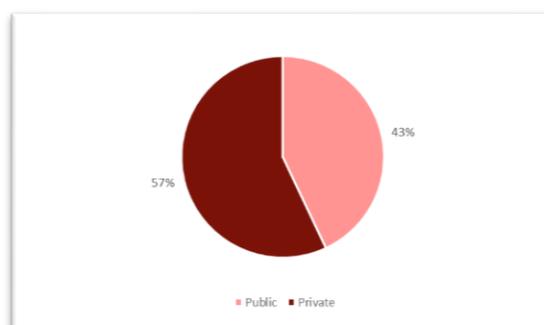
### Urban-Rural Segmentation

As the continuation of the first cycle, only 1% of students in the second cycle of general secondary education live in a rural environment (MENETFP, 2017).

### Public Private Segmentation

In the second cycle, distribution in terms of type of institution remains more or less the same as that of the first cycle, with nonetheless a slightly larger share than the private sector (55%) compared to the public one (45%) (Government of Ivory Coast, 2016%) (Government of Ivory Coast, 2016).

Diagram 4: Distribution of students by type of institutions at the Second Cycle of General Secondary level (2015/2016)



<sup>15</sup> Congo: 22%; Togo 44%; Senegal 37%; Cameroon 53%; France 88%

### **C. State subsidies to general & technical secondary education in the private sector**

Due to a lack of seats in the public sector, the Ivorian State subsidizes secondary private schools in order to respond to current demand. In fact, every year, students and parents of students entering the secondary cycle submit their applications for their child's admission to possible schools in the region. Because the public sector is facing excessive demand, the State grants subsidies to the private schools where children are enrolled. To be selected as a school serving "those Assigned by the State," a school must have been in operation for at least two years and submit an application to the ministry (Government of Ivory Coast, 2016).

This situation is all the more significant in Technical Education, given that in 2014, the State only had three Technical Education public institutions (Global Partnership for Education, 2016).

In total, the amount of subsidies granted to private schools was estimated to be 90 billion CFA francs in 2015 (World Bank, 2017). Amounts of subsidies are set by level:

- 120,000 CFA Francs in the first cycle of secondary education;
- 140,000 CFA Francs in the second cycle of general secondary education;
- 175,000 CFA Francs for technical education.

#### **Challenges identified due to the subsidy process:**

- Subsidies are often too low, compared to the amounts required from parents, because some parents do not have the means to make up the difference (World Bank, 2017).
- The amounts are paid without considering school performance, depriving schools of any incentive to improve their performance (World Bank, 2017).
- The Government's payment lead times often vary between 1 and 2 years<sup>16</sup>.

## **VIII. TECHNICAL EDUCATION & VOCATIONAL TRAINING (SECONDARY)**

### **Numbers & Outcomes**

In 2014, around 100,000 technical secondary education and vocational training students were counted, versus some 38,000 students in 2005 (Government of Ivory Coast, 2016).

One of the major causes of the lack of access to the ETEFP is the lack of infrastructure due to the very high infrastructure and maintenance costs.

Placement of graduates also remains very low, with rates ranging from 17% for holders of a Brevet d'Etudes Professionnelles [Certificate of Vocational Competence] (BEP) to 49.5% for those holding a Brevet de Technicien Supérieur [Senior Technician Certificate] (BTS) (MENETFP, 2017).

### **Cost to households**

On average, a child with technical education or vocational training is worth around 230,000 CFA francs a year for a family.

### **Teaching**

Available training technical education shows that among existing sectors, in spite of the significance agriculture has to the country, only 0.2% of existing branches are in agrarian sectors, versus 73% of service and 27% of commercial sectors.

### **Girl-Boy Segmentation**

In 2014/2015, there was more or less equitable distribution, with 51% of boys and 49% of girls (MENET, 2015).

### **Public Private Segmentation**

In 2014/2015: 97% private education buildings versus 3% public sector ones (MENET, 2015).

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<sup>16</sup> Source: Comoé Capital experience

### **Investing in secondary education in Ivory Coast (for a Comoé Capital type fund)**

The principal aspects to be analyzed when considering whether to invest in secondary education in Ivory Coast are:

- **State's share of student funding:** State-funded students generally represent a significant share of secondary school income. This provision amounts to investing in an entity where the State is the principle client, with 1 to 2 year lead times. International schools are the only ones that do not admit State assignees, and therefore are not subject to the same provisions (for example, the French lycée or Enko).
- **Collection Issues:** Certain schools charge additional tuition to those assigned by the State, even though this practice is prohibited. Client debts need to be analyzed in detail, because, based on what we understand, the tuition supplements of those assigned by the State, as well as the tuition of other students, are rather substantial, and the schools have trouble recovering them. Between this debt, the one for Master's students, and the State one, school balance sheets show a high level of debt.
- **Educational quality:** The analysis of student outcomes, student-instructor ratio and instructor profiles is essential when doing due diligence. The overall level of students is hard to assess in intermediate classes. Regarding the examination level classes (3rd and Term), the analysis is easier (comparing the above mentioned examination outcomes). Teachers are expected to have completed the ENS, and generally teach in both private and public schools. Certain schools make use of students. An analysis of teacher profiles, as well as the number of "resident" teachers, is essential in doing the analysis.
- **Other subjects:** Secondary education schools must be accredited to operate.

## **IX. HIGHER EDUCATION**

The share of higher budget education in the National Budget represents 19%, as a percentage of the budget of the education sector and 1% as a percentage of the GDP.

### **Numbers & Outcomes and Infrastructure**

In 2015, over 192,842 were registered at higher education institutions, marking an increase of 13% relative to 2013 (MENETFP, 2017).

Given the significant increase in the level of students, higher education lacks both the infrastructure and human resources needed to respond to this growth. In fact, in 2015, at the level of university and public vocational school research, the student-researcher ratio averages 20:1, but in certain fields, such as law, the ratio is 69:1. More generally, there seems to be a deficit of over 4500 instructors, all levels taken together (MENETFP, 2017).

One of the major causes of the lack of access to higher education is the lack of infrastructure due to very high infrastructure and maintenance costs.

In 2017, BTS eligibility rate was 70.5% at the national level (Fratmat.info, 2017).

The admission rate for graduates is also still low, in spite of constant improvement, with unemployment rates ranging from 28% to 43%, depending on which careers are pursued (MENETFP, 2017).

### **Cost to households**

On average, paying for a child in higher education comes close to 400,000 CFA francs a year for a family.

### **Girl-Boy Segmentation**

In terms of girl-boy segmentation, the number of girls in universities is slightly above 30% at universities, and nearly 40% at the Vocational Schools (MESRS, 2014).

### **Urban-Rural Segmentation**

Higher education is exclusively located in urban areas. In fact, in 2013-2014, over 70% of the institutions were located in Abidjan. Moreover, taken together, Abidjan, Bouaké, Daloa, Korhogo, San Pédro and Yamoussoukro cover 100% of the country's universities and over 95% of the vocational schools (MESRS, 2014 (MESRS, 2014).

### **Public Private Segmentation**

In 2013-2014, there were 216 higher education institutions. Around 85% of those institutions are Professional Schools, while some 15% are Universities. In terms of public/private segmentation, both types show a strong predominance of private schools, with over 80% of their buildings belonging to private institutions (MESRS, 2014).

See Appendix II: Higher education institutions 2013-2014.

### **State subsidies to the private sector, in general & technical secondary education**

Just as in secondary education, the State grants subsidies to the schools per student admitted to the first cycle (BTS and licence). Amounts of subsidies are set by level:

- 300,000 CFA francs per student in the service sector for the BTS, up to a limit of three years (in case of repeats);
- 450,000 CFA francs per student for the licence or technical sectors.

The gap between tuition and the subsidy is financed by the student (even though it is prohibited)<sup>17</sup>.

### **Several players<sup>18</sup>**

#### **→ Several public players:**

Even though there is no official classification, public schools such as the INPHB ([www.inphb.edu.ci](http://www.inphb.edu.ci)) or the ENSEA ([www.ensea.ed.ci](http://www.ensea.ed.ci)) have a solid reputation in terms of quality as well as integrating young people professionally.

#### **→ A few private players:**

**The largest private school** is the Loko group, with more than 10,000 students, covering almost all the technical and service sectors. The school has several locations in Abidjan and in the country's interior. Available vocational programs are the BTS (around 400,000 CFAF), the licence (starting at 650,000 CFAF) and the master's or engineering degree, starting at 1.1 MFCFA). [www.grouneloko.com](http://www.grouneloko.com)



**The historical school** is the PIGIER group, which basically does the training for the service sector. The school has been in existence for over 50 years and has a solid alumni network. Tuition is 650,000 CFAF for the BAC + 2 and 1 M CFAF for the licence. The school is affiliated with the French group with the same name. [www.pigierci.com](http://www.pigierci.com)



Schools with a solid reputation for high quality even though there is no official, credible classification:

- **FUPA** ([www.fupa-edu.com](http://www.fupa-edu.com)) is a private university founded by the university's instructors. It expects to create a several hectare campus with student residences.
- **IUGB** ([www.iugb.edu.ci](http://www.iugb.edu.ci)) located in Grand-Bassam, partnering with American universities. Tuition is 1.4 MCFAF.
- **Em Lyon** ([www.emlyon.blearn.net](http://www.emlyon.blearn.net)) has developed a Master's program in finance in partnership with the FHB university of Abidjan.



### **Investing in higher education in Ivory Coast (for a Comoé Capital type fund)**

The principal aspects to be analyzed when considering whether to invest in upper education in Ivory Coast are:

- **State's share of student funding:** Most of the time, State-funded students represent a significant share of Superior quality school income. This provision amounts to investing in an entity where the

<sup>17</sup> Source: Comoé Capital experience

<sup>18</sup> Source: Comoé Capital

State is the principle client, with 1 to 2 year lead times. This provision is valid for the first two post-BAC (BTS) years. Beyond that, the cost of tuition is falls to the students.

- **Collection Issues:** Certain schools charge additional tuition to those assigned by the State, even though this practice is prohibited. Client debts need to be analyzed in detail, because, based on what we understand, the tuition supplements of those assigned by the State, as well as the tuition of other students, are rather substantial, and the schools have trouble recovering them. Between this debt, the one for Master's students, and the State one, school balance sheets show a high level of debt.
- **Educational quality:** The analysis of student outcomes, student-instructor ratio and instructor profiles is essential when doing due diligence. At the BTS level, the analysis can be done on the basis of eligibility rates.
- **Other subjects:** Universities and professional schools must be accredited to operate.
- **Employability & social integration:** The schools have only a few statistics on job placement for their graduates. They only have a limited connection to their alumni network and few schools are committed to programs leading to seals of quality (EMBA, EQUIS etc.).

## X. POST-INSTITUTIONAL PROFESSIONAL TRAINING

The professional training market can be divided into three categories<sup>19</sup>:

- (A) **Face-to-face training:** learners must go to facilities to receive in-person training from an instructor;
- (B) **Video conference training:** learners receive their training through videos transmitted live to their digital tool. During a videoconference, learners can participate and communicate with the remote interlocutor;
- (C) **Online training:** learners can access the training available on their PC/smartphone/tablet whenever they want.

### A. The vocational training market

In 2016, the post-secondary professional training market, that is, not covering any professional training taught in junior or senior high school, was allocated a budget of 33.4 Billion CFA francs by the State (Ministry under the Prime Minister in charge of the Budget, 2015). The 33.4 B CFA francs represent the amount spent by the institutions, but it should be noted that it does not represent the total share of Post-secondary professional training expenditures in the Ivorian economy.

According to UNESCO, the portion of public administration expenditures in 2014 represented just 64.9% of total education expenditures (UNESCO Institute for Statistics, 2016). On the basis of this figure, we can estimate that the total Ivory Coast education related-market comes to almost 51 Billion CFA francs.

Moreover, we know that State revenue for the FDFP (Vocational Training Development Fund), through total payroll taxes, represented an amount of 16 Billion CFA francs in 2016. This amount has been constantly on the rise since 2012, with an increase of 28% (Ministry under the Prime Minister in charge of the Budget, 2015). However, we cannot confirm a direct link between expenditures on the Vocational Training mentioned below and the revenue generated for the FDFP.

In terms of household spending, in 2015 spending on education represented 3% of household consumer spending was in sixth place, following food, housing, apparel, transportation, and communications (National Institute for Statistics, 2015). This makes clear the relative importance education holds for households.

### B. Professional training players

#### a) The Vocational Training Development Fund (FDFP) – [www.fdfp.ci](http://www.fdfp.ci)

The FDFP was established in 1991 by the Ivory Coast government to consolidate its vocational training system.

It receives revenues from the learning tax (0.4% of total payroll) and an additional Tax for Continuing Vocational Training (1.2%), along with any other available funding dedicated to professional training.

<sup>19</sup> By "professional training" we are excluding academic training.

The companies contributing to the taxes listed below receive subsidies to train their employees up to a level equivalent to the amount of their taxes. Depending on the type of training, the subsidies can cover all, or some, of the training requested by the employer. Due to its financial nature, the FDFP is under the supervision of the Ministry of State, the Ministry of the Economy, Finance, and the Budget.

The FDFP's key mission is financing:

- Continuous training actions for salaried company employees (promotion),
- Studies regarding general planning of the continuous professional training,
- Entry level vocational training (entry in the job market),
- Studies related to general planning of technical vocational training.

The FDFP refers companies to various training consultants through an accreditation system. This accreditation is also available to companies doing online training. In fact, Educatel used to be part of it (they have closed) to some FDFP partners.

#### b) MENETFP

See section 4.A.

#### c) Face-to-face training centers in Ivory Coast

While there is no specific figure showing market distribution across these three categories in Ivory Coast, the various discussions<sup>20</sup> held under the auspices of the Education Impact Fund have confirmed that the great majority, around 99%, of Vocational Training offered occurs face-to-face.

According to the FDFP, the Ivory Coast has some 800 face-to-face accredited training consultants, leading to broad indirect competition and highlighting the demand for training in Ivory Coast (FDFP, 2017).

In spite of many variable factors (hours of training dispensed, quality, etc.), coming out of Comoé Capital's market analysis, the average price for face-to-face training is around 150.000 CFA Francs.

Based on the market study performed by Comoé Capital, the main professional training firms are: Maison Chefs d'Entreprise – MCE ([www.mce-afrique.net](http://www.mce-afrique.net)), CIFIP ([www.cifip-ci.com](http://www.cifip-ci.com)) et RMO ([www.rmo-jobcenter.com](http://www.rmo-jobcenter.com)). Most of the professional training firms are also recruiting firms.

Only 002 ([www.oo2.fr](http://www.oo2.fr)), a French business with a subsidiary in Ivory Coast, works entirely in the training sector.

After the market analysis (carried out with 1500 users contacted by Etudesk), the conclusion was reached that:

- Demand for training by face-to-face companies has been growing, particularly for the past 2-3 years.
- There is a strong trend towards training in the following fields: management, English, accounting and office automation (particularly Excel).
- The majority of businesses still have not realized they need to train their employees.
- Many businesses are not aware of the accessible FDFP resources for which they contribute.

Please note that FDFP accreditation is the main driver in the professional training sector. In fact, companies generally only work with FDFP accredited consultants so they can be reimbursed. The process for procuring FDFP accreditation can be long but seems to be transparent, given the number of accredited consultants. See the list of recruitment agencies on the following link: [www.fdfp.ci/directory](http://www.fdfp.ci/directory).

#### **Programs launched with businesses**

Several customized programs launched in Ivory Coast:

- **Data Science Institute launched by Orange Côte d'Ivoire, INPHB Yamoussoukro and École Polytechnique:** this customized program makes it possible to develop training programs for Big Data engineers, analysis statisticians, Data Mining, Data Analyst or Data Scientist, etc. (Abidjan Net, 2017).

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<sup>20</sup>Educarrière [career education], FDFP

- **HEC Paris Certificates** in Abidjan: HEC Paris has developed programs tailored to government officials in Ivory Coast. Moreover, short programs (certificates) were developed for the general public (HEC, 2018).
- **Seedstars joint program – Youth Employment Agency:** This joint program aims to train first off 100 young people in ICT and agribusiness (Agence Emploi Jeunes, 2017).

Several similar initiatives have been launched jointly between businesses and schools or training centers. For example, the Yamoussoukro École des Mines et Pétrole (ESMG) has a Schlumberger support program, etc.

#### d) Centers & platforms offering online training

While video conference training is used a lot in universities, it is definitely used less in the context of short-term vocational training. In fact, among the 800 professional training consultants, the market analysis done by Comoé Capital showed that the video conference training portion is minimal.

Moreover, Ivory Coast inhabitants do not go to online training platforms (i.e.: Coursera, edX, Udemy, etc.)<sup>21</sup>.

To date, the only Ivory Coast player doing 100% online training is Etudesk (with local content).

## XI. GENERAL POINTS AT VARIOUS LEVELS OF EDUCATION

### A. Out-of-school Children

According to a study of Out-of-School Children (OOSC) in Ivory Coast, two very important points are still needed to increase the school enrollment rate for children in Ivory Coast: the rate by gender, as well as access to education in rural areas, which were over 70% of 6-16 year old OOSC children reside (MENETFP, 2017).

The main reasons for a lack of access and dropouts are the following (MENETFP, 2017):

- Reasons for lack of access: Financial constraints, household duties, disability, illness, no birth certificate, child labor, death of parents and intentional dropout.
- Reasons for dropping out: Too many repeated years, disruptions in education, lack of school supplies and textbooks, limited educational support by teachers, lack of support for children at risk, as well as a lack of dialogue between parents and teachers.

### B. Urban/rural differences

As an extension of the preceding points about the lack of access to education in rural areas, the following chart shows where children attending school are located.

Table 7: Location of children attending school

	Rural	Urban
Preschool	21%	79%
Elementary	55%	45%
Secondary 1st cycle	4%	96%
Secondary 2nd cycle	1%	99%

Source : MENETFP, 2017

While this information does not focus on education needs, it should be noted that although 45% of children attend school in rural areas at the elementary school level, the rate drops to 4% and 1% in secondary education, stressing how few children have access to secondary education in rural areas. Similarly, even

<sup>21</sup>Main reasons: unknown platforms, overly expensive training, inappropriate means of payment.

though 65% of elementary school institutions are located in rural areas, only 28% of secondary schools are located in rural areas (MENETFP, 2017).

Comoé Capital's on-the-ground experience shows that it is also important to note that this lack of access to preschool and secondary education is paradoxically especially strong in the country's cocoa-producing region, in spite of the economic importance of this area (MENETFP, 2017).

The difference between urban and rural areas is not limited to access to education. In fact, the PASEC study done in 2014 (2016) shows that student outcomes in an urban environment are better than those in a rural one<sup>22</sup>, for both reading and mathematics.

### **C. Access to education for women**

In spite of the significant progress made by Ivory Coast in terms of education, there are considerable gaps in girls' access to education. In fact, while the girl-boy ratio is more or less steady in elementary school, this ratio drops significantly once they reach secondary school (see the above different ratios at various academic levels). In 2015 at the secondary level, there were 16% points of difference between girls and boys in terms of enrollments in 2015 (World Bank, 2017).

### **D. Pregnancy in school age girls**

Pregnancies remain a reality for girls in Ivory Coast, mentioned as "a true social problem in the Ivory Coast" (RFI, 2017). In fact, the government study shows that 600 cases of pregnancy were recorded in primary education during the 2014/2015 school year, over 3000 cases in the first cycle of secondary education, and nearly 1000 cases in the second cycle of secondary education. In spite of a very slight drop at the elementary school level, the pregnancy rate grew to around 3% relative to 2011/2012 (MENETFP, 2017). These girls are frequently identified as living in at risk environments and impregnated by their teachers, often in exchange for favors. Some other students are also identified as players in the pregnancies.

### **E. Violence against children**

Violence against children also remains a real issue in Ivory Coast's education sector. Nowadays, the country remains among the 12 West African countries where physical violence has still not been prohibited in schools, in spite of flyers discouraging it. UNICEF publishes the following statistics for Ivory Coast (2016, quoted in AllAfrica, 2016):

- Nearly 4/5 students are subject to verbal violence in the school environment;
- Nearly 2/5 of students are subject to physical violence in the school environment;
- Nearly one out of three students is the victim of physical humiliations in the school environment;
- 38% of students, both girls and boys, are victims of sexual harassment in school;
- Nearly 1/10 students have been subject to sexual touching.

### **F. Infrastructure and textbooks**

#### **Textbooks**

As shown in the chart above comparing between Ivory Coast's equipment & textbooks and the average for sub-Saharan Africa and Cape Verde, the number of students in Ivory Coast per reading or mathematics book is, respectively, 1.8 and 1.6, versus 212 and 217 on average for Sub-Saharan Africa.

#### **Cafeterias**

As the MENETFP report explains (2017), hunger was one of the main reasons in 2012 for dropping out of school. Currently, 35% of the country's primary schools have cafeterias in operation<sup>23</sup>.

### **G. Teacher salaries**

In spite of limited outcomes in terms of educational success, Ivory Coast's teacher salaries are relatively high compared to the country's stage of development in terms of both primary and secondary education. In May 2017, the President of Ivory Coast asserted that the country's teachers "have the highest salaries in the sub-region," with a salary of 390.000 CFA Francs for elementary school teachers and 511.000 CFA francs for

<sup>22</sup>Educational and teaching resources are equivalent at the socioeconomic level.

<sup>23</sup> However, that figure appears to be overestimated. State source.

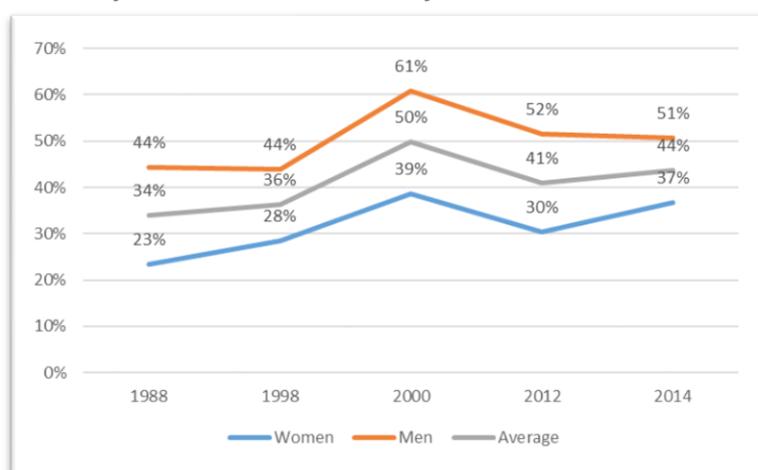
secondary education ones in 2016 (Connection Ivoirienne, 2017). In fact, according to the World Bank's report, average elementary school salaries are 33.4% higher, compared to the average for selected comparator countries. In secondary education, while the difference is less significant, it nonetheless exists. The wage gap comes to an average salary nearly 9 times the GDP per Ivory Coast inhabitant, as opposed to a maximum of 6.6 for the most efficient countries (World Bank, 2017).

## XII. LITERACY

In 2014, Ivory Coast still had over 7.100.000 illiterates, 2,100,000 of whom were between 15 and 24 years old.

In spite of an overall improvement since 2012, with an average of 44% in 2014, the literacy rate nonetheless remains below levels prior to the 2000 economic crisis. Moreover, the situation for men has even slightly deteriorated since 2012. For 15-24 year old youth, the situation is positive, showing progress for both women and men, with an average going from 48% in 2012 to 53% in 2015 (UNESCO Institute for Statistics, 2017) (MENET, 2016).

Chart 9: Literacy rate for individuals 15 years old and above in Ivory Coast



Source: UNESCO Institute for Statistics, 2017

There are three kinds of literacy: traditional literacy, functional literacy, and consciousness raising literacy (MENET, 2016).

- **Traditional literacy** is based on formal education, and makes it possible to learn how to read, write, and do arithmetic through books available in school;
- **Functional literacy** is understood as beyond 1st, and is integrated into a business's projects or operations, for example;
- **Consciousness raising literacy** makes it possible to learn/of make the illiterate aware of their rights and to raise their consciousness about their living conditions through civic education modules (values, legal aspects, etc.). This third approach is used a great deal in Ivory Coast.
  - 9 to 13 year old children follow traditional literacy training, as provided in school.
  - Children over 13 and adults generally receive functional literacy training and informal education at literacy centers.
  - Some 6 to 11 year old children also attend literacy centers when traditional literacy is not available to them.

In 2014-2015, nearly 70,000 people attended literacy centers, 60% of whom were women and over 50% were individuals 19 to 44 years old.

The training centers are frequently managed by volunteers or recruited people, who are supposed to have reached at least 3rd (i.e., end of first cycle of secondary education). Reality, however, is different, with nearly 30% of those leaders having only completed elementary school, and only 27% having done upper level studies (MENET, 2016).

It is estimated that currently, 87% of the literacy centers are private initiatives. These centers do not generally have a separate physical location, and instead use the buildings of associations, private or public schools,

etc. While only 10% of the centers are approved by the Department of Literacy and Non-Formal Education (DAENF), the majority (97%) of the centers were headed by Elementary Education Inspection Counselors in charge of Literacy (CIEPA)) (MENET, 2016).

**Investing in literacy education in Ivory Coast (for a Comoé Capital type fund)**

- Training centers trainers should be focused on, due to the number of volunteers and the tendency of very few of them to have any qualifications.
- Literacy is mainly subsidized by UNESCO and the ministry.
- Investment opportunities remain limited because the profile of the target groups (often low purchasing power, women who find it hard to find free time, due to their marital and cultural status (prior authorization of husbands) or classes that meet outside of conventional times (evening classes).
- Several start-ups are trying to develop solutions and NGO's are providing massive support to this vulnerable population.
- Aside from these start-ups and publishers, we have not seen any "for profit" business models focusing on literacy.

**XIII. INNOVATIONS: "EDTECH" IN IVORY COAST**

In response to Comoé Capital's experience, through the Education Impact Fund, and concurrently with an article by one of the principal start-up players in Ivory Coast, Seedstars (Seedstars, 2017), we can conclude that advances in computerization in Ivory Coast's educational sector remain extremely limited, not to say nonexistent.

Seedstars explains that a lack of "EdTech" opportunities is due, in part, to a lack of talents in the country due to the still too low rate of any schooling, or poor quality education, along with a lack of cooperation from public authorities.

However, rapid progress in the rate of Internet penetration and the development of support facilities (incubators, accelerators, start-ups studios) provides a glimpse into some interesting possibilities for "Edtech" in Ivory Coast. The following recent statistics show Internet penetration.

*Table 8: Quarterly evaluation of the mobile Internet subscriber based in Ivory Coast*

	March 2017	June 2017	September 2017	Rate of change (Sept/June)
ORANGE	3 644 748	3 449 491	4 392 431	27,34%
MTN	6 289 108	7 433 489	8 245 620	10,93%
MOOV	3 680 628	3 396 237	4 297 743	3,33%
TOTAL	13 614 484	14 850 217	16 935 794	14,04%

*Source : ARTCI, 2017.*

There has been a significant increase in the number of incubators in Ivory Coast in terms of support for young "EdTech" sector developers<sup>24</sup>. More specifically, two very well-represented players in the ICT field are Seedstars and the Digital Youth Foundation.

The development of ICT's represents an opportunity to develop learning solutions that include digital solutions. "EdTech" is embryonic in Ivory Coast, but several start-ups offer some innovative solutions:

- Etudesk ([www.etudesk.com](http://www.etudesk.com)) is a platform offering courses designed in partnership with businesses. The company defines itself as a business university. The company designs courses in partnership with

<sup>24</sup> OrangeLab, JokkoLabs, 5K, CoLab, ProdiJe, Inovis, IncubIvoire, Digital Youth Foundation, Seedstars

businesses and provides access to students and professionals. The company wants to bridge the gap between theoretical training and business needs.

- Actinobis ([www.actinobis.com](http://www.actinobis.com)) is a coaching center doing a mix between online and face-to-face training on office automation modules and in-company good practices. It is aimed at students holding a BTS or master's and with little or no in-company experience.
- International Platforms such as Udemy, OpenClassrooms and Edacy also have a presence in Ivory Coast.

Comoé Capital has found several developers offering "EdTech" projects. Due to the lack of documentation in the sector, a list of projects found is presented below.

Table 9: "EdTech" projects encountered through the experience of the Education Impact Fund

Field	Description	Name of business project	Launched/Proj. stage
School administration	Mobile money payment for school & follow-up expenses	JFR Systems	Project Stage
School administration	School administration management platform	Global Link	Project Stage
Literacy	Literacy Projects via digital platforms	LUCIE, AmBC	Project Stage
Educational Tablet	Education at preschool level	Qelasy	Launched
Search for work/training	Site showing various work and training opportunities in Ivory Coast	Educarrière	Launched
Online training	Online professional training site	Etudesk EIF (investment)	Launched
Online training	Online professional training site	Xyria, Oniveau	Project Stage
Online training	Online education makeup/support courses	Fortitude, BACPrep	Project Stage
Work/training opportunities	Site showing employment/training opportunities	Educarrière	Launched
Work/training opportunities	Site showing employment/training opportunities	Djazi	Project Stage
Audio books	Audio books	ZoomVocal	Project Stage
Publishers/Readers	Web platform allowing publishers and readers, on the one hand, to discover new authors, and allowing writers to share their work, gain recognition, and connect with their public on the other hand	225nouvelles	Project Stage

## XIV. OTHER PLAYERS IN THE IVOIRIAN EDUCATIONAL SYSTEM

### A. Publishing Houses and Printers

#### a) Publishing Houses<sup>25</sup>

##### (i) Publishing House market

The publishing house market is estimated at around 17 Billion CFA Francs<sup>26</sup> (source: professionals sector, Comoé Capital analyses), the Ivory Coast publishing market includes two main segments: (e) the educational market (80% of market) and (ii) the non-educational market.

The non-educational market only represents around 20% of the market and consists of literature (children, youth, specialized and general).

The educational market consists of the following:

- **Preschool:**
  - This is a relatively new market occupied by players such as PUCI, NEI-CEDA, the Collections ivoiriennes (centering on Catholic teaching, significant preschool player) and Vallesse Editions. The works are written and distributed by the ministry before being accredited (no calls for tender). However, publishers can propose works to be recommended by the ministry (no school obligations). As for preschool, the schools have more flexibility in selecting the works to be presented to their students.
- **Elementary school:**
  - Elementary school manuals require accreditation through calls for tender every 5 years. At the beginning of the 2015-2016 school year, the ministry counted 3.6 million students enrolled in the elementary cycle.
  - The distinctive characteristic of primary schools is that works in public schools are free. Thus, for this segment, publishers have a choice between:
    - Focusing on private schools that choose to use a book from a list of recommended books.
    - Publishing and printing Ministry works (Collection Ecole & Développement), which could expose the State to a risk of debt when distributing them to public institutions and paying later. The various authors we met find this segment a bit delicate, because of the strong constraints imposed by the Government through its reference terms (short procurement time, large numbers of books, long State payment periods, and prices set by the Government).
  - For a work to be approved (elementary or secondary), it must be drafted in collaboration with Ministry methodologists specializing in each subject matter, to make sure that they meet student needs/difficulties. The average time frame between a decision to create a workbook and the moment it goes on sale is at least one year.
- **Secondary school:**
  - These works must also be accredited through call for tender. Educational (non-textbook) publishing is also highly developed in this segment. It consists of activity manuals and booklets. Activity or integration workbooks are often written and approved by or in conjunction with Ministry agents. JD Edition is very much in evidence in this still nascent sector. Yearbooks and other review workbooks are produced by local publishers. These fungibles must be approved in order to be recommended.
- **Higher Education:**
  - It is not subject to any particular regulations. This segment is dominated by foreign publishers.
- **Technical Education:**
  - CIDFOR has granted publication of technical education works to the association of publishers. That is, all members of this association will be allowed to publish manuals for the coming year.
- **On literacy:**
  - At the start of the 2015-2016 school year, Ivory Coast had 2,828 literacy centers for 75,275 students spread over levels 1 (64%), 2 (26 %) and post alpha (10%).

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<sup>25</sup> Source: *Etude de marché Comoé Capital*

<sup>26</sup> Source: *Comoé Capital market study (professional sector)*

Unlike mature markets, the switchover to digital is embryonic.

## (ii) Main players

The main publishing houses are:

- **NEI-CEDA:** since their creation in 1961 and 1972, respectively, CEDA and NEA (later Binea then NEI) had a monopoly on elementary school textbooks until 2002. As of that date, the sector underwent a revolution with (i) the end of the textbook monopoly and (ii) free elementary education textbooks. After their merger in 2011 (first merger in 2005), the State, which still held 12.5% of the group's capital, transferred its shares to Hachette Livre. NEI - CEDA is the uncontested leader in publishing in Ivory Coast, with over 600 titles and 37% of market share (according to estimates by sector professionals). NEI - CEDA is listed on the BRVM and in 2016 earned 4 B CFA Francs (as opposed to 5 B CFA Francs in 2015) for a negative EBITDA of -1442 MFRANCS CFA in 2016 (as opposed to 699 M CFA Francs in 2015). According to information received, the losses were due to governance problems (choice of printing houses linked to shareholders without necessarily having the best financial offer) and on positioning (focus on manuals that have weaker margins).
- **Eburnie:** with nearly 300 titles and 25% of market share, Eburnie is No. 2 in Ivory Coast publishing. Created by its CEO, AMOIKON-FAUQUEMBERGUE MARY AGATHE, Eburnie has been able to expand by winning a call for tender when it was created in 2002 (initial call for tender post-liberalization of sector).
- **FratMat Editions:** with 18% of market share, this print media leader (SNPECI), has transformed its publishing center into a unit in its own right (2005). FratMat publishing activity is based both on other group entities (print, accounting, broadcasting, marketing) and on foreign partners for textbook publishing).
- **Les Classiques Ivoiriens:** this publishing house was created in 2004 and distributes the African Classics' production to the entire sub-region, along with Belin and Heinemann, and other local publishers. Its market share is estimated to be 12%.
- **The PUCI:** born in 1998, the PUCI essentially publish academic works, are developing their operations in the educational sector, particularly in preschool, and circulate and distribute foreign publishers as well.
- **Neter:** created in 1992, Neter has published some 30 titles in two large collections: the political Politique and the collection Universités d'Afrique. It also publishes a cultural review (Racines) and non-textbook works.
- **JD Edition:** JD Editions is a recent arrival (2014) in the publishing sector. It specializes almost exclusively in producing activity workbooks. Comoé Capital approached JD Editions' teams to learn a little more about the company. The promoter has a military background and wound up in publishing thanks to friendships in the ministry. Volumes: JD Editions sells between 10,000 and 50,000 workbooks per subject per year. Its best sales are in mathematics workbooks (all classes).
- **Vallesse Editions:** created in 2005, Vallesse is a publishing house that publishes some seventy works, 33 of which are approved for the 1st cycle educational program, approved non-textbook works, and children's literature works.

The publishing house market has other players. Among them, there are the computer graphics designers (internally, for the largest houses, or externally, for the smaller ones), authors, bookstores, and printers (main cost).

### b) Printers

Among the printing houses, the most significant players are:

- **Hooda Graphics** ([www.hoodagraphics.com](http://www.hoodagraphics.com)): the company is headed by M. Diabaté Daouda and has cutting edge equipment. Thanks to its quality services, the company has been able to establish itself in just a few years as one of the top paper print shops (1.4 M CFA Francs in sales in 2013).
- **Imprisud** ([www.imprisud.ci](http://www.imprisud.ci)): with 1.2 Md CFA Francs in sales (2013), Imprisud works with the main publishers in the market.

Publishers frequently call on foreign players for printing jobs with shorter or longer lead times. In fact, the lead time for delivery of works printed in India is 2 months and in the United Arab Emirates, 1 month.

**Investing in publishing house (from the point of view of a typical investor like Comoé Capital):**

- The business does not require any particular accreditation at the literary novel level. Approvals are required for textbooks, even if they are not always granted according to the rules.
- The informal market is fairly strong and a price war can flare up. However, the informal market often goes ahead and markets works at higher prices with lower quality (lack of access to the works).
- Although prohibited, publishers market their works directly to schools, becoming competitors to the booksellers. This situation can be explained by the weakness of the bookseller network.
- If a publishing house is engaged in publishing textbooks, its activity will be strongly cyclical (start of school year).
- Generally, publishing house activity is dominated by textbooks, particularly at the level of the first cycle of secondary education. This leads to the marginalization of literary novels.

**B. Bookstores**

The biggest bookstore in the country (Librairie de France) has only 7 shops in the country. The two top bookstores in the country are:

**Librairie de France**



As the main bookstore player, the company has 7 stores, in Abidjan (4), San Pedro, Yamoussoukro and Bouaké. The group has had several governance issues (conflict among shareholders), [www.librairiedefrance.net](http://www.librairiedefrance.net). [www.librairiedefrance.net](http://www.librairiedefrance.net)

**Librairie Carrefour Siloe**



With mainly Catholic clergy stock holders, Carrefour Siloe has managed to become a challenger to Librairie de France. Along with its Cocody store, the company has 2 mini-stores called kiosks in Adjamé and le Plateau. [www.librairiecarrefoursiloe.com](http://www.librairiecarrefoursiloe.com)

Other bookstores like Aleph, art'Elettres, Delon etc. have the same strategy, but are a smaller in size.

The other players are:

- **Mass distribution:** players such as Prosuma or FNAC market works on the same basis as booksellers.
- **Informal bookstores:** they have a reputation of marketing counterfeit works. A recently established association of second hand booksellers aims to defend their interests.

**Investing in bookstores (from the point of view of a typical investor like Comoé Capital):**

- The activity does not require any special accreditation. For example, a bookseller can be a publisher (such as Librairie de France, which has a publishing house).
- The informal market is fairly strong and price wars can flare up. Besides being informal (no taxes), second hand booksellers use counterfeit networks to market works, which make it hard to compete with them. During a market study, some thirty bookstores were analyzed, very few of which had the right profile from the promoter-vision-size point of view to make it attractive to Comoé Capital.
- Although prohibited, publishers market their works directly to schools, becoming competitors to the booksellers.
- Their activity is cyclical and 80% of sales take place during the final quarter (start of school year). This situation explains why the bookstore network is so weak. Certain bookstores create temporary sites in schools during the start of the school year, to make them easily accessible to their customers. Another strategy adopted by the sector is to develop stationery and leather goods shops by aiming those businesses at that non-cyclical sub-sector.

**C. Organizations advocating for education**

### **Save the Children**

Save The Children is an international NGO that defends the rights of the child through several countries around the world. For its 2016-2018 programme, the NGO focuses on four different pillars: (i) support for Community initiatives, (ii) improving the quality of the learning environment, (iii) improving the quality of learning outcomes, and special attention to (iv) inclusion, equity and gender.

### **International Rescue Committee (IRC)**

The IRC is focusing their efforts in Ivory Coast by making sure children can enroll in school through construction of new school building and economic empowerment of parents, supporting community businesses and creating jobs for youths, empowering women to make personal and economic decisions. IRC works to ensure that school-aged children can access basic education and have age-appropriate literacy, numeracy, and social and emotional skills.

### **International Cocoa Initiative (ICI)**

ICI promotes child protection in Cocoa-growing communities. They work to ensure a better future for children and their families and advances the elimination of child labour. ICI works with its partners to ensure that cocoa-growing communities are more protective of children and their rights, that the cocoa supply chain manages the risk of child labour responsibly and that knowledge and information are promoted openly and transparently. ICI aims to improve child protection for one million children by 2020. Examples for education actions taken by ICI are : construction/renovation of classrooms, construction/rehabilitation of school kitchens, supply of school desks, creation of school management committees etc.

### **Institut Européen de Coopération et de Développement (IECD)**

IECD supports human and economic development in Ivory Coast by education, vocational training, youth employability and support to small enterprises. The main objectives of IECD is to allow children and teenagers to access to good quality education and to favor their personal development, to offer young people the chance to access a decent and sustainable job, to allow entrepreneurs to acquire the skills needed to launch and/or ensure the performance of their activity and to create an ecosystem that favors the development of the activity of enterprises.

### **Aflatoun International**

Aflatoun International is a dynamic network of partner organisations, teachers, supporters and staff, delivering high-quality education. Aflatoun International provides support and tools to the partner organisation to deliver social, financial and entrepreneurial skills to children and young people.

### **Inades-Formation**

Inades-Formation is a network of pan-African Associations governed by Ivorian law which works for equitable and sustainable development in Africa. Inades-Formation in Côte d'Ivoire leads several projects aimed at integrating young people into agriculture and valuing the food resources of Côte d'Ivoire. They are known to be very present in rural areas.

### **Global Partnership for Education (GPE)**

The Global Partnership for Education<sup>27</sup> is a partnership among several players and a platform for funding education in developing countries. In 2017, the organization raised around USD 200,000 for building a new education program. *In toto*, between 2012 and 2017, the organization brought in over 40 million USD to implement the 2016-2025 Education/Training Sector Plan. The project is co-managed by the National Ministry of Education, Technical Education and Vocational Training and the World Bank. The AFD also plays a role as agency coordinator (Global Partnership for Education, N.D.).

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<sup>27</sup> French translation of *Global Partnership for Education*

## **Local NGOs**

Mouvement pour l'Education, la Santé et le Développement (MESAD) [Movement for Health and Development Education]:

The MESAD is an Ivorian NGO created in 2001 that works with children and youth in Ivory Coast. Its fields of expertise are education, health and development (MESAD, N.D.).

### **Ecole pour tous**

Ecole pour tous is a local NGO created in 2003 which promotes education for all in urban and rural areas. They offer a remediation system to fight against illiteracy and contribute to the integration of children and adults. They organize conferences debates on the issues of compulsory education, meetings to raise awareness of parents and children trainers on the importance of schooling and literacy.

### **Soleil Levant Education**

Soleil Levant Education is an NGO militating for human rights, particularly those of women and children, through education, consciousness raising and protection. The NGO is very active in particular in the renovation and construction of schools.

## **Associations**

### **Transforming Education in Cocoa Producing Communities (TRECC)**

The association TRECC aspires to improve the living conditions of all children and youth in ivory Coast through quality education. Its goal is to allow children and youth to live healthy and fulfilling lives, meet local and global challenges, pursue their dreams and fulfill their potential. TRECC firmly believes in the power of public-private partnerships to transform education. Its activities reinforce the links between public policies, business strategies, the aspirations of civil society and scientific research.

## **Multilateral organizations**

### **UNESCO**

UNESCO stands for United Nations Educational, Scientific and Cultural Organization. The UNESCO office in Abidjan opened in 2013. The organization mainly works on implementing the National Development Plan, and has a close relationship with the National Ministry of Education, Technical Education and Vocational Training. More specifically, since 2016, UNESCO has been actively working on a major literacy project through the ICT's. In particular, the organization supports start-ups in this field.

### **UNICEF**

UNICEF stands for the United Nations International Children's Emergency Fund. In Ivory Coast, UNICEF focuses on the two following areas: quality basic education in a school environment and providing basic education in an informal setting.

## **Bilateral organizations**

### **Agence Française de Développement (AFD)**

The AFD is very active in the area of education in Ivory Coast. In fact, one of its six pillars of action in the country is to "promote youth employment." This occurs in the following areas: improving basic education, bringing professional training programs and the private sector together, drawing young people onto the job market, modernizing higher education and scientific research, along with supporting marginalized people to promote their access to education and employment.

## **XV. REPORT ON THE EDUCATION SECTOR IN THE IVORY COAST: SWOT ANALYSIS**

### **Strengths**

- The government's determination to seek to improve the country's education through its budget and its reforms is noteworthy:
  - The budget allocated to the education sector has increased significantly since 2010. In 2015, the budget allocated to education in Ivory Coast in terms of percentage of national GDP is higher than the African average.
  - Since 2011, many reforms have been undertaken since the end of the political crisis affecting the country, such as the requirement to educate all primary school age children, lowering the eligibility threshold and reforming higher education, and putting the LMD system in place to bring it into closer harmony internationally.
  - A multi-year development plan was established in partnership with the World Bank.
- Ivory Coast is seen to be a flourishing environment for entrepreneurship, particularly "EdTech," with a remarkable growth in the number of incubators over the two past several years.
- There is a strong network of well-known NGO's and foundations, with significant important financial means in Ivory Coast working to support the country's educational cause.

## **Weaknesses**

- Overall outcomes remain unsatisfactory
  - Academic outcomes are below average for African countries;
  - The efficiency of the educational sector in Ivory Coast is significantly lower than other countries in the region and other emerging countries;
  - Education life expectancy is below the African average;
  - Grade level rates of completion are below the African average;
  - School enrollment is below par for sub-region countries.
- On average, schools do not have an infrastructure adapted to the learning experiences of children: lack of latrines, no electricity, shortage of textbooks.
- physical, sexual and mental violence against children and youth is present in both girls and boys academic institutions. In addition, there continue to be a large number of cases of pregnancy.
- The allocation and training of elementary and secondary teachers do not take the country's realities into account, highlighting a lack of cooperation and/or harmonization between the private and public sectors.
- There is a serious lack of schools in rural areas.
- Statistics show that the rate of enrollment for girls drops as soon as they enter secondary school.
- The ratio of the number of students to teachers, aside from preschool, is too high, with averages higher than those of neighboring countries and those with a similar economic status.
- Professional placement of technical, vocational and higher education graduates is also low.
- In spite of the growing presence of incubators in Ivory Coast, few entrepreneurs manage to stand out at the present time.
- In terms of textbooks and literary works, the informal market remains very strong, leaving an opening for poorer quality works at less competitive prices than those in the formal market.
- The bookstore network is still thin in the interior of the country, making access to textbooks and literary works harder.

## **Threats**

Improving the Ivory Coast's educational sector could be disrupted by country's political instability and/or an economic downturn. In fact, in spite of a recovery from the 2011 crisis, the country's political situation remains tense, raising the fear of an escalation in events. The country, like the other countries in the region, has also had to confront an increase in terrorism for several years. Finally, climate catastrophes may also impact the education of children and youth by destroying infrastructures, or conditions harming the country's agricultural production, impacting parents' incomes. It should be noted that two-thirds of Ivory Coast's active population is agricultural.

## **Opportunities**

The country's economic situation has been growing strongly for the past several years, increasing its GDP by 8.8% in 2016, supporting the government's active engagement in national education. Moreover, the potential growth of technology (wired and wireless Internet, along with the continuous growth of mobile Internet) connected with education gives a glimpse of some attractive prospects.

## XVI. OPPORTUNITIES FOR ACTION IN THE EDUCATION SECTOR

As follow-up to this report, in terms of the private sector, there are several opportunities in the education sector in Ivory Coast, some of which are:

- Favor cooperation between the public and private sectors to consolidate the allocation and systems for training teachers;
- Remedy the lack of infrastructure, physical assets and children's textbooks;
- Foster access to education in rural areas;
- Foster preschool education;
- Foster quality teaching;
- Foster education free of physical and mental violence, whether against girls or boys;
- Review professional training opportunities in Ivory Coast to make access to employment opportunities easier;
- Foster the publishing market;
- Foster the bookstore market to make it easier for them to access academic and literary resources in the interior of the country;
- Support EdTech in Ivory Coast;
- Work cooperatively with the various key players (public, foundations, NGO's, businesses) in the educational sector.

## XVII. INVESTMENT OPPORTUNITIES FOR A PRIVATE EQUITY FUND

For a Comoé Capital type of investment fund, several investment opportunities exist in the education sector, combining financial performance and social impact. These business models are:

- **Training linked to business needs:** One of the main problems in the Ivory Coast education sector is that there can be a gap between theoretical training and business needs. The *Vocational Education and Training (VET)* and *Career and Technical Education (CTE)* business models based on technology (Etudesk, Edacy, Udemy) or not (RMO, 002, continuous training, etc.) answer a market need and can create a strong impact. In this case, from the point of view of a fund, solutions combining (scalable) technology and face-to-face instruction (local market demand) should be focused on. Agreements with businesses are also a favorable approach, as is obtaining FDFP accreditation.
- **Educational quality:** Business models fostering an improvement in educational quality can be attractive to an investor, given the fairly low level of training in Ivory Coast. There are, for example, some new learning methods, such as the Enko Education model or the Educas start-ups.
- **Building schools:** the low density and poor quality of school facilities make it attractive to invest in basic school equipment. Preschool weakness underscores a pressing need, even if the need for infrastructure is felt at all levels. Nevertheless, putting up walls means covering the risk linked to the Ivory Coast's real estate market. Most schools opt for renting.
- **Services to schools:**
  - Facilities: few schools will have cafeterias or other conveniences (latrines, water sources, residences, etc.). Businesses offering services such as cafeterias or school management services can be attractive.
  - Management: in fact, the schools are suffering from management problems, and have problems covering their fixed costs due to poorly calculated tuition and collection problems.
  - Funding: a school management entity or a company making loans can be attractive because they answer a significant need. However, granting loans to students requires first being aware of the "value" of a diploma, as well as the job placement rate and the average salary upon graduation. Few schools have this kind of statistics and their link to their graduates is almost-nonexistent.

- **Bookstores:** the low density of bookstores can create investment opportunities in this field. This involves finding the right balance between the cyclical nature of operations and logistics (presence in sparsely populated rural settings with low-income, poorly educated populations - for online bookstore models).

## XVIII. CONCLUSION

In conclusion, this study focuses on the Ivory Coast's government's encouraging determination, while noting that the efforts made do not appear to be adequate, or may be inappropriate, to meet country's the educational needs. With an annual 2.4% growth rate in its population, where over 40% of the population is under 14, there are considerable opportunities for supporting Ivory Coast in its duty to educate.

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## APPENDIX I: SEGMENTATION OF STUDENTS BY TYPE OF INSTITUTION AND BY LEVEL IN IVORY COAST

		2004/2005	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016
Preschool	Public (#students)	20 693	28 036	33 112	41 138	41 223	44 225	58 202	72 689	84 149	Not available	Not available
	Community (#students)	ND	ND	ND	ND	ND	824	1 311	3 287	3 000	Not available	Not available
	Private (#students)	20 863	24 236	19 513	22 998	26 942	29 660	31 880	37 333	39 069	Not available	Not available
	<b>Total</b>	<b>41 556</b>	<b>52 272</b>	<b>52 625</b>	<b>64 136</b>	<b>68 165</b>	<b>74 709</b>	<b>91 393</b>	<b>113 309</b>	<b>126 218</b>	<b>144 128</b>	<b>161 696</b>
Elementary	Public (#students)	1 451 312	1 924 550	2 128 622	2 129 119	2 201 741	2 369 471	2 550 742	2 585 881	2 696 397	Not available	Not available
	Community (#students)	ND	ND	ND	4 333	10 336	19 641	12 064	41 454	51 240	Not available	Not available
	Private (#students)	210 589	255 251	227 618	249 907	264 583	315 346	357 985	394 082	429 327	Not available	Not available
	<b>Total</b>	<b>1 661 901</b>	<b>2 179 801</b>	<b>2 356 240</b>	<b>2 383 359</b>	<b>2 476 660</b>	<b>2 704 458</b>	<b>2 920 791</b>	<b>3 021 417</b>	<b>3 176 964</b>	<b>3 370 558</b>	<b>3 617 219</b>
Secondary 1st cycle	Public (#students)	288 393	384 955	423 880	418 835	425 024	412 621	454 378	467 301	517 715	Not available	Not available
	Private (#students)	194 997	216 208	211 721	233 204	275 255	335 899	346 641	428 851	488 276	Not available	Not available
	<b>Total</b>	<b>483 390</b>	<b>601 163</b>	<b>635 601</b>	<b>652 039</b>	<b>700 279</b>	<b>748 520</b>	<b>801 019</b>	<b>896 152</b>	<b>1 005 991</b>	<b>1 126 919</b>	<b>1 237 030</b>
Secondary 2nd Cycle	Public (#students)	94 733	111 730	151 191	282 629	329 431	210 571	183 156	160 997	143 503	Not available	Not available
	Private (#students)	82 029	104 648	70 541	90 686	136 475	167 744	148 289	158 523	172 062	Not available	Not available
	<b>Total</b>	<b>176 762</b>	<b>216 378</b>	<b>221 732</b>	<b>373 315</b>	<b>465 906</b>	<b>378 315</b>	<b>331 445</b>	<b>319 520</b>	<b>315 565</b>	<b>352 086</b>	<b>384 844</b>
Vocational training	Public (#students)	22 317	22 789	25 683	28 032	32 509	26 586	28 077	34 755	46 782	Not available	Not available
	Private (#students)	15 517	21 258	20 048	19 494	27 680	22 227	31 251	49 839	55 490	Not available	Not available
	<b>Total</b>	<b>37 834</b>	<b>44 047</b>	<b>45 731</b>	<b>47 526</b>	<b>60 189</b>	<b>48 813</b>	<b>59 328</b>	<b>84 594</b>	<b>102 272</b>	<b>Not available</b>	<b>Not available</b>
Higher Education	Public (#students)	94 771	99 865	99 909	97 185	89 733	15 264	15 856	88 738	98 003	Not available	Not available
	Universities Pub.	69 436	74 560	76 300	74 192	66 057	3 633	774	72 510	84 001	Not available	Not available
	Vocational Schools Pub.	25 335	25 305	23 609	22 993	23 676	11 631	15 082	16 228	14 002	Not available	Not available
	Private (#students)	51 819	56 907	52 007	55 711	54 540	50 973	64 981	82 190	78 434	Not available	Not available
	Universities Priv.	2 209	4 332	4 434	4 919	5 407	2 551	8 024	7 813	9 232	Not available	Not available
	Vocational Schools Priv.	49 610	52 575	47 573	50 792	49 133	48 422	56 957	74 377	69 202	Not available	Not available
<b>Total</b>	<b>146 590</b>	<b>156 772</b>	<b>151 916</b>	<b>152 896</b>	<b>144 273</b>	<b>66 237</b>	<b>80 837</b>	<b>170 928</b>	<b>176 437</b>	<b>Not available</b>	<b>Not available</b>	

Source: Government of Ivory Coast, 2016, MINEFTEP, 2016

**APPENDIX II: HIGHER EDUCATION INSTITUTIONS 2013-2014**

Location	University			Vocational School		
	Public	Private	Total	Public	Private	Total
Abidjan	2	26	28	13	119	132
Bouaké	1	1	2	3	10	13
Daloa	1	0	1	3	4	7
Korhogo	1	0	1	1	4	5
San Pédro	0	0	0	1	0	1
Yamoussoukro	0	0	0	2	8	10
<b>Others</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>8</b>	<b>16</b>
Abengourou	0	0	0	1	2	3
Aboisso	0	0	0	0	1	1
Adzope	0	0	0	0	1	1
Agboville	0	0	0	0	1	1
Dabou	0	0	0	1	0	1
Dimbokro	0	0	0	0	1	1
Gagnoa	0	0	0	2	0	2
Grand-Bassam	0	0	0	0	1	1
Jacqueville	0	0	0	1	0	1
Katiola	0	0	0	1	0	1
Man	0	0	0	1	0	1
Odienne	0	0	0	1	0	1
Toumodi	0	0	0	0	1	1
<b>TOTAL GENERAL</b>	<b>5</b>	<b>27</b>	<b>32</b>	<b>31</b>	<b>153</b>	<b>184</b>
<b>% By type of institution (public,private)</b>	<b>16%</b>	<b>84%</b>	<b>100%</b>	<b>17%</b>	<b>83%</b>	<b>100%</b>
<b>% By type of institution (University/Vocational School)</b>			<b>17%</b>		<b>83%</b>	

Source: MFSRS, 2014