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FINANCE MECHANISMS OF VOCATIONAL TRAINING IN 5 SUB-SAHARAN AFRICAN COUNTRIES

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The analyses and comments developed only concern their authors and do not represent an official position.

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The appraisals and recommendations contained in this report only concern their authors however.

Report Summary

The field survey on vocational training funds follows on from the study on the impact and financing of training funds carried out in 2005 on behalf of the French Ministry for Foreign Affairs[1]. It reports on the analysis of the variations existing in the countries surveyed (South Africa, Benin, Burkina Faso, Mali and Tunisia) between the statutory view of the funds and their actual operation and situates this analysis in relation to the typological classification of the funds and to the parameters of success and efficiency identified during the first study.

Survey methodology

It is the result of five missions which enabled members to meet the strategic and decision-making players of each country in the field of vocational training, but also those in charge of funds and their users.

The survey questionnaire, which was the same for all countries, focused particularly on the following points:

- the institutional situation and the strategic and operational role of each fund in relation to the economic and social situation of the country and the vocational training policies implemented,
- the actual role of different vocational training players and especially of social partners, in the selection, implementation and assessment of training actions financed by the funds,
- the long or short-term nature of resource-collection methods and the way in which allocation of resources fulfils training needs in both the formal and informal sectors,
- the adaptation of procedures for application, selection and assessment of the actions financed to the skills of beneficiaries targeted and service-providers called upon to respond to these in a qualitative and efficient manner,
- the assessment of each fund's strengths and weaknesses and the proposals for improvement and development that emerge.

Survey structure

The first part describes the specific identities of the funds surveyed according to a presentation grid that is common to all. The survey addresses the "National Skills Fund" (NSF) and the "Sectoral Skills and Training Authorities" (SETAs) of South Africa, the Fund for the Development of Vocational Training and Apprenticeship (FODEFCA) of Benin, the Support Fund for Vocational Training and Apprenticeship (FAFPA) of Burkina Faso and Mali and the various financial instruments of Tunisia such as: a rebate for the Vocational Training Tax (TFP), the National Continuous Training Programme (PRONAFOC) and the Vocational Training and Apprenticeship Promotion Fund (FOPROFA). All these funds are presented according to the context of their creation, their institutional identity, their level of decision-making and financial autonomy, the type of social partnership established within the consultation and decision-making bodies, the methods for gathering and allocating resources devoted to financing training, the processes for application, assessment and selection of proposals for projects implemented, the main results achieved (actions carried out, audiences trained, impact assessed) as well as current, planned or desired changes, in order to better optimise the financial instruments.

The second part examines the five funds surveyed in a cross-spanning nature, based on reading parameters that lead to better comprehension of the common characteristics as well as the specificities that bring them closer or separate them in terms of objectives, operation, the intervention and financing process and results. Among these parameters feature the differences in the development levels of the countries surveyed, the relationship that each fund establishes at basic training level (substitution or complementarity approach), real allocation or not of taxes collected to finance training, the way in which the financial instruments in place favour current reforms or not, the

[1] Richard Walther, Study on the Impact and Financing of Training Funds, MAE, 2005

levels of coherence or variation between the collection practices established and the re-allocation of funds, the nature of public/private partnerships and the social partnership (tripartite versus a “user” approach), the ways beneficiaries access finance funds, the inclusion or not of training financed by the fund in the national qualification systems or even the methods of moving from an approach of simply providing training offerings to an approach of structuring training offerings according to demand.

The third part is based on the large trends identified from the reading parameters, in order to propose a model design and a typology of the funds based on the priority role given to the acquisition of skills and qualifications through the economic and employment policies of the countries concerned, on the importance given to the various economic players of the formal and informal sectors, on the level of participation of social partners and the various professional organisations in the definition and implementation of instruments and finance methods, on the importance given to the professional simulation exercise in the training mechanisms and actions used and finally, on the methods for assessing and optimising the results obtained.

As a conclusion the study puts forward some useful recommendations for more efficient and relevant use of resources available. It insists on the need to specify the funds’ objectives and their connection with the financing of basic vocational training and the importance of ensuring real autonomy of financial resources in relation to the State, in accordance with the strategies implemented. It underlines the obligation for the funds to be pro-active in relation to small and medium-sized businesses if they want to prevent taxes and levies from being swallowed up by businesses that are better equipped at all levels. It insists on the need to finance the expertise required to structure the training as much as the training itself. Lastly, it shows how the networking of African funds, especially at partner level, could be productive for comparing experiences, mobilising players and promoting social dialogue at continent level.

The main results

These are linked to the following main observations:

- The objectives and intervention methods of the funds differ according to the country's economic level. Thus, in the Sub-Saharan African countries where "informal” employment represents between 80% and 90% of employment and where the educational level is low, training of craftsmen is predominant, whereas in the semi-industrialised countries such as Tunisia or South Africa, where the industrial sector represents 25% and 30% of employment respectively, with, in both cases an important modern services sector, applications to the funds come more from the "modern” sectors.
- The funds intervene as a support for structuring vocational training systems. Their intervention method depends greatly on the extent of the basic training field, and especially on the inclusion or exclusion of vocational training in this field. In this respect, Sub-Saharan African countries who integrate technical education into basic training, differentiate themselves from both Tunisia, who has turned technical and vocational education into an alternance vocational training mechanism, as well as South Africa, who has set up a training mechanism for employees and young people seeking vocational integration based on the acquisition of skills in a working situation.
- All countries created or already had a vocational training tax, but none of them allocates the totality of this tax to continuing vocational education and apprenticeships. In Sub-Saharan Africa, part of the funds collected by the State are not paid out, while the part given to training is shared between the informal and formal sectors. In Tunisia, a significant part of the tax is used to finance the running of basic training whereas South Africa devotes one fifth of its tax to social development and finding work for the unemployed.
- The role of social partners (employers’ and workers’ organisations) in the management of funds for financing vocational training is confirmed everywhere, but it often remains consultative. Their legitimacy as the privileged discussion partners of the State is, in addition, weakened by the fact that most management boards include a representation of activity sectors among their members (commercial organisations and/or various categories of training users). This situation does not prevent the fact that in all the countries surveyed, there exists a demand for stepped-up social dialogue which is appearing, inter alia, through the signing of agreements between employers’ (and craftsmen's) and workers’ organisations on the

importance of making vocational training dynamic and allowing the maximum number of beneficiaries access to it.

- Even though the various countries are implementing differentiated application, assessment and selection procedures, they all have common requirements: the need to simplify the existing administrative and financial procedures with a view to shortening response periods and facilitating access for everyone and, above all micro and small businesses to available finance, the importance of creating a more quality-based than competition-based training market, the need to target finance mechanisms implementing national training strategies and policies and to give the funds the means to be autonomous and responsible in the allocation of resources.
- All the funds are looking for experts as close as possible to the professional sectors, which would allow them to both structure the training needs of economic players and to select the best training responses for the needs identified. But at the moment few financial means are planned or available to attract and stabilise the desired expertise and, in this way, help the countries to leave behind a supply-based approach and to implement mechanisms, methodologies and engineering that are likely to promote a demand-based approach.
- Lastly, all the funds are provided technical assistance by bilateral or multilateral fund providers. But whereas their intervention is part of national training policies in the more developed countries such as Tunisia and South Africa, in the Sub-Saharan developing countries it is subjected to conditional aid which is often dispersed thus affecting the effectiveness of its action.

The differentiated typology of the funds

Based on the optimal operating model of the funds, proposed in the documentary study in 2005 on the impact and the financing of thirteen African funds, the study then carries out a typological analysis of the funds, which first of all highlights the strategic and operational approach taken in each fund and then describes the functional optimisation diagram. In this way, the study describes three main types of funds:

- The “integrated development” fund of South Africa
- The “dual development” fund of Tunisia
- The “established and multi-objective” fund of Sub-Saharan African countries.

For each of the three types, the study takes note of what exists and indicates the functional optimisation possibilities that will allow the funds to function with maximum efficiency and impact. The whole typological exercise leads to the definition of an ideal type that is common to the five countries surveyed. This is summarised in a new modelised diagram comprising the following common elements:

- the definition of a structured national policy on basic training, apprenticeships and continuing education,
- the focussing of the funds’ missions on continuing education and apprenticeships,
- the development of a strategy by the funds (definition of actions, beneficiaries and procedures) in relation to the objectives to be reached,
- the stabilisation and sustainability of resources through direct allocation of the vocational training tax to the funds,
- the integration of international aid into the objectives and means of the national policy,
- the most tripartite and autonomous management possible for allocating resources,
- assistance to social partners to acquire the necessary skills to carry out their responsibilities in the field of vocational training,
- support for the creation and setting-up of expertise close to companies and branches or professional organisations,
- support for a training market that favours a demand-based response over a supply-based one,
- simplified application procedures making competition conditional upon the structuring of quality training offerings,
- an allocation of resources based on solidarity between the modern and informal sectors and between small, medium and large-sized businesses,

- support for the setting-up of a system of qualifications and quality that integrate the specificities of training in the informal sector,

- finally, the quantitative and qualitative assessment of the results, the identification of good practices and their enhancement through networking at national and inter-African levels.

Strategic and operational recommendations

Recommendations are made as a result of the modelisation work on the funds' optimal operation. Through conclusive reflection, these recommendations develop the most urgent or the most structuring transformation lines of action, which seem necessary to us to be implemented by the funds surveyed. They are based on five lines of action.

The first recommendation is for the funds and it sets the need to clarify their objectives, especially in the relationship that they establish between basic training and continuing education. It develops the idea that basic vocational training must not be mainly supported by businesses and beneficiaries, but that it should first and foremost be part of the State's responsibility and means. If this is not the case, the funds are diverted from their initial mission of developing the vocational training of workers (both young and adult). It is also a requirement of equity in response to almost free secondary and higher education.

The second recommendation highlights the fact that the autonomy of the funds' resources constitutes an objective whose fulfilment would more often than not be in contradiction to the State's financial constraints. For this reason it remains essential. Without their control of resources, the funds' managers would not be able to define a veritable training strategy in their own fields.

The third recommendation highlights the importance for the funds to adapt their financial instruments to the requirements of micro, small and medium-sized businesses. For Tunisia and South Africa it recommends a pro-active effort from the funds in order to encourage training applications from the businesses that have the most difficulty in accessing finance. For the Sub-Saharan countries it proposes that the funds envisage allocation procedures, which, while maintaining co-payment by beneficiaries, would be in relation to the real contribution capabilities of players who need financial support the most in order to move away from the survival mentality and enter the realm of development.

The fourth recommendation suggests that the funds take the appropriate means to ease the actual move from a supply-based to a demand-based approach, which implies moving away from financing for pre-formatted training courses towards building appropriate responses for applicants' needs. It is therefore desirable that they plan to devote part of their resources to the setting-up of expertise that would make it possible and easy for businesses and workers to structure their training needs according to demand.

The last recommendation is for promoters of cooperation and public aid so that they encourage exchanges between the training funds in Africa in order to promote social dialogue in and between countries and so that they help to develop, through the funds' irreplaceable experience, African centres of expertise in the field of vocational training and apprenticeship.

1. Introduction

The field survey on vocational training funds in five African countries follows on from the study on the impact and financing of training funds carried out in 2005 on behalf of the French Ministry for Foreign Affairs[2] Its objective is to report on the analysis of the variations existing in the countries surveyed (South Africa, Benin, Burkina Faso, Mali and Tunisia) between the statutory view of the funds and their actual operation and to situate this analysis in relation to the typological classification of the funds and to the parameters of success and efficiency identified during the first study.

This current study is the result of field missions carried out in five somewhat contrasting countries: agrarian and small-scale economies and semi-industrial economies, developing countries and emerging economies, a Francophone country in northern Africa, the Anglophone country of South Africa and the Francophone Sub-Saharan countries in a Priority Solidarity Zone.

These missions enabled members to meet the strategic and decision-making players of each country in the field of vocational training, but also those in charge of funds and their users. The following people were interviewed in particular: representatives of public authorities, social partners and professional organisations who were members of management boards, the funds' executive and management personnel, various categories of financers and fund providers, operators, persons in charge and training experts as well as various categories of beneficiaries of the funds. The list of all the people surveyed is published as a complement to the study.

The survey questionnaire was the same for all countries. It is featured in the annex in the form of an interview guide. Based on the assumptions of optimal fund operation identified during the previous work, it focused more particularly on the following points:

- the institutional situation and the strategic and operational role of each fund in relation to the economic and social situation of the country and the vocational training policies implemented,

- the actual role of different vocational training players and especially of social partners in the selection, implementation and assessment of training actions financed by the funds,

- the long or short-term nature of resource-collection methods and the way in which allocation of resources fulfils training needs in both the formal and informal sectors,

- the adaptation of procedures for applications, selection and assessment of the actions financed to the skills of beneficiaries targeted and service-providers called upon to respond to these in a qualitative and efficient manner,

- the assessment of each fund's strengths and weaknesses and the proposals for improvement and development that emerge.

The discussion partners who were met all accepted to reply frankly and in a well-argued manner to the questions asked. The information and reading they gave and the observations they made of the reality of the funds in their countries are related and analysed in the country reports annexed to the current study. The reading of these reports however, brings to light the fact that the initial questions were mainly based on the institutional and functional model of Sub-Saharan African funds and that they had to be adapted or even reformulated in relation to the specificities of the Tunisian and South African funds.

The results of field surveys were completed by documentation available in each country. This documentation is more or less developed depending on the countries and is at times published and widely circulated, and at times reserved for a limited audience. In general, selective reading of the information received had to be carried out in order to differentiate what directly concerned the funds' operation from the financing of vocational training.

[2] Richard Walther, Study on the Impact and Financing of Training Funds, MAE, 2005

All these observations and analyses were structured in relation to the initial questions and presented in three main parts.

The first part describes the specific identities of the funds surveyed according to a presentation grid that is common to all. The survey addresses the "National Skills Fund" (NSF) and the "Sectoral Skills and Training Authorities" (SETAs) of South Africa, the Fund for the Development of Vocational Training and Apprenticeship (FODEFCA) of Benin, the Support Fund for Vocational Training and Apprenticeship (FAFPA) of Burkina Faso and Mali and the various financial instruments of Tunisia such as: a rebate for the Vocational Training Tax (TFP), the National Continuous Training Programme (PRONAFOC) and the Vocational Training and Apprenticeship Promotion Fund (FOPROFA).

All these funds are presented according to the context of their creation, their institutional identity, their level of decision-making and financial autonomy, the type of social partnership established within the consultation and decision-making bodies, the methods for gathering and allocating resources devoted to financing training, the processes for applications, assessment and selection implemented, the main results achieved (actions carried out, audiences trained, impact assessed) as well as current, planned or desired changes, in order to better optimise the financial instruments.

The second part examines the five funds surveyed in a cross-spanning nature, based on reading parameters that lead to better comprehension of the common characteristics as well as the specificities that bring them closer or separate them in terms of objectives, operation, the intervention and financing process and results. Among these parameters feature the differences in development level of the countries surveyed, the relationship that each fund establishes at the basic training (substitution or complementarity approach), real allocation or not of taxes collected to finance training, the way in which the financial instruments in place favour current reforms or not, the levels of coherence or variation between the collection practices established and the re-allocation of funds, the nature of public/private partnerships and the social partnership (tripartite versus a "user" approach), the access methods for beneficiaries of the finance funds, the inclusion or not of training financed by the fund in the national qualification systems or even the methods of moving from an approach of simply providing training offerings to an approach of structuring training offerings according to demand.

The third part is based on the large trends identified from the reading parameters, in order to propose a model design and a typology of the funds based on the priority role given to the acquisition of skills and qualifications through the economic and employment policies of the countries concerned, on the importance given to the various economic players of the formal and informal sectors, on the level of participation of social partners and the various professional organisations in the definition and implementation of instruments and finance methods, on the importance given to the professional simulation exercise in the training mechanisms and actions used and finally, on the methods for assessing and optimising the results obtained.

As a conclusion the study puts forward some useful recommendations for more efficient and relevant use of resources available.

2. The specific identities of the funds surveyed

The choice of the five countries surveyed was made with the concern of covering the diversity of the training funds implemented in Africa. There was no question of reducing this analysis to the domain of West African countries, and even less so of restricting it to the Francophone domain. There was no question either of exclusively selecting funds that already had significant operational experience or funds in a successful situation both from a strategic and operational point of view. On the contrary, it was important to create a sample expressing the plurality of economic, social and geographic situations in Africa while at the same time aiming to analyse the way in which the funds participate in both economic development and poverty eradication through the promotion of continuing education and apprenticeship.

The presentation of the five funds surveyed according to common analysis criteria enables us to learn about the institutional and operational situation of each one, while at the same time making a comparison between their common points and their particular specificities possible.

2.1. Training funds in South Africa

In South Africa there is no training fund identified in the form of an institution in charge of the overall management of vocational training financing. In these terms, one can identify a whole legal and institutional framework that determines the methods for collecting and allocating resources, the contents and conditions for implementing training and finally, the strategic guidelines and the assessment of the entire system.

2.1.1. The overall steering of the financing system

The policy of vocational training, which is identified in South Africa under the terms of skills development policy, is steered by the Ministry of Labour in conjunction with the National Skills Authority (NSA).

The NSA is a body that represents public authorities, social partners, regional authorities and various public interest associations. It is responsible for advising the Minister for Labour both in the field of skills development strategy and policy and in the field of regulation and allocation of resources. Furthermore, the NSA is in charge of relations with the SETAs (Sector Education and Training Authorities) as regards their way of implementing the national strategic plan from a sectoral point of view. Finally, it is responsible for assessing the implementation of the national strategic plan in order to debrief the Minister.

According to the social partners, the NSA plays an exclusive role of advisor. It is impossible to talk about tripartism insofar as the public authorities control the entire decision-making process and attenuate consultation with both employers and trade unions into a dialogue that is open to all civil society players.

2.1.2. Payment of the 1% levy on the total payroll

Financing of vocational training, excluding basic training, is based on the creation of a “skills development levy-grant scheme.”

This mechanism was established by a 1999 bill and constitutes a permanent system of resources for financing all training actions targeted by the skills development scheme. This mechanism, which began in the form of compulsory payments by employers of 0.5% of the total payroll in April 2000, was increased to its current level of 1% in April 2001.

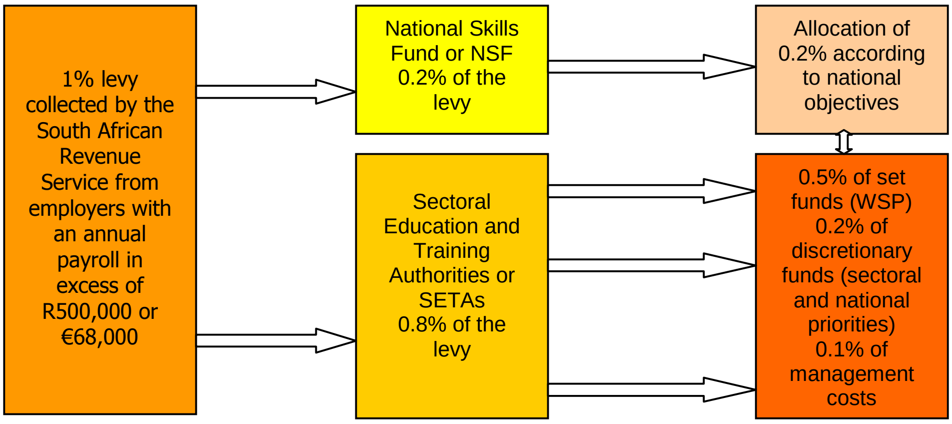
Employers with an annual payroll in excess of R500,000 or €68,000 per year are subjected to this levy.
Public-service employers in the national or provincial sphere of government, religious and charitable institutions, and national or provincial public entities whose expenditure is paid directly or indirectly from public funds voted by Parliament are exempt from this levy. Non-governmental organisations (NGOs), community-based organisations (CBOs) and community-based cooperatives are also exempt from the levy.

The National Skills Development Strategy 2005-2010 however, obliges national and provincial government departments to devote 1% of the payroll budget to training actions as of March 2010.

The levy is paid monthly as part of tax contributions to the South African Revenue Service. The annual amount of the levy amounts to R3.4 billion or €463 million.

2.1.3. Distribution of the levy between a national fund and sectoral funds

The bill sets forth that the 1% levy on payroll is distributed in the following manner: 0.2% goes to the National Skills Fund (NSF) and 0.8% goes to the Sector Education and Training Authorities (SETAs). The SETAs allocate these funds partly to set objectives and partly to discretionary objectives that comply with the sectoral and national priorities reaching 0.5% and 0.2% respectively of payroll.



Distribution channels of the levy, Training Funds, SOUTH AFRICA, MAE

2.1.3.1. The NSF

The objective of the NSF is to finance social development and especially the qualification of job seekers, informal sector training as well as the different types of action in order to respond to the lack of skills in certain fields or sectors of activity. The funds collected go through the employment administration channels and are distributed in relation to the objectives determined for training by a five-year National Skills Development Strategy. The first strategy covered the 2001-2005 period. The second one came into force in April 2005 and continues until March 2010. One third of the fund's resources goes through the channels of provincial social development plans, one third is allocated to the development of strategic skills and the rest could either finance training research projects, student grants or companies employing workers as part of their new investments.

Overall, the NSF is at the service of a national employment and training strategy that integrates the equity requirements of South African society, i.e. priority access for black people, women and people with disabilities to qualifications and employment from which they are widely excluded at present.

2.1.3.2. The SETAS

Set up in 1998, the SETAs are sectoral organisations present within 23 professional branches (finance, banking, textile industry, chemistry, agriculture, etc.). They are run by a management board made up of employers' representatives and workers' representatives on a 50/50 basis. The board is responsible for defining the strategic approach of the sector, controlling its activities, informing its members of the activities implemented and making all the decisions in the interest of developing priority skills for the sector. The SETAs must draw up an annual development plan for their sector.

They receive 0.8% of the total levy. The grants allocated to them are distributed as follows:

- 0.5% of grants, known as "Workplace Skills Grants" (0.6% up to early 2005), are reassigned to the businesses that apply for them. For this they are obliged to establish a training plan structured mainly on the implementation of learnerships or work-based education and training programmes and to then justify the actions carried out. The SETAs have no freedom of decision in this field and simply check the conformity of applications and justifications presented by the businesses.

- 0.2% of the grants, called discretionary grants, are assigned after decision by the SETA's management board. The SETAs reallocate this amount de facto as part of the responsibilities that are determined for them in the implementation of the National Skills Development Strategy. For the 2005-2010 period it mainly concerns identifying the critical skills of the sector, training specialists in sectoral training, integrating job seekers into new jobs, raising the level of skills among adults with little or no training in qualifications that are little developed, or helping the informal sector to better structure its own needs in skills. The SETAs could have access to complementary financial resources from the NSF in order to develop these different actions.
- 0.1% of the grants are used to finance SETAs' personnel and internal running.

The SETAs' action has been assessed following the finalisation of the first National Skills Development Strategy 2001-2005. The evaluations given to their action vary according to the players, but it would seem that all the sectoral funds need to increase the quality of their interventions through better qualification of their policy-makers and managers and that the 2005-2010 strategy should allow them to improve the efficiency of their interventions.

2.1.4. The dual role of the funds in a national qualifications and multi-annual planning strategy

The funds' interventions are in keeping with an overall architecture of the skills development system based on a national qualifications system and a National Skills Development Strategy.

2.1.4.1. Qualification objectives

The objective of the training courses carried out by the NSF or the SETAs is to become part of the national qualification or certification system which is steered by the "South African Qualifications Authority" (SAQA). In very concrete terms, this means that the training courses financed by the funds must correspond to the skills that the beneficiaries need to acquire so as to be assessed in regard to the skills units and frames of reference defined in the national plan.

All the learnerships financed by the SETAs, but also Adult Basic Education and Training (ABET) or the acquisition of priority skills are therefore directed towards the certification of qualifications acquired and as a result are structured according to the units and types of skills whose results can be measured and therefore validated. It was thus planned that at least 70% of all workers participating in training courses financed by the funds would reach level 1 of the national qualification system by March 2005. The actual results achieved are in the process of being published.

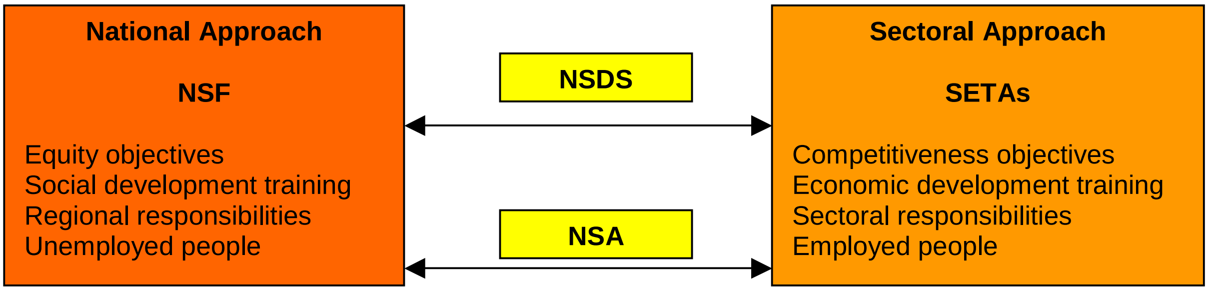
2.1.4.2. Strategic development objectives

Financing of both the NSF and the SETAs is in keeping with the National Skills Development Strategy (NSDS). An initial strategy for 2001-2005 had set the objectives of training a minimum of 15% of workers and giving 75% of large businesses and 40% of medium-sized businesses access to the 0.5% rebate of the levy.

A new 2005-2010 strategy retains the same objectives but sets new ceilings: 80% of large businesses, 60% of medium-sized businesses and 40% of small businesses should be able to receive finance and 70% of the 450,000 job seekers in need of training should in fact be able to obtain work. It states at the same time that the training programmes to be implemented should be based on an equity policy in the field of employment and for this it should aim to include 85% of black people, 54% of women and 4% of people with disabilities among its participants.

2.1.4. Conclusion: the dual approach of the funds

To conclude, it seems that the financing of vocational training in South Africa implements strategic and operational processes that constantly drift between approaches that may not be contradictory but are at least different to what could be represented in the following diagram:



Training funds, SOUTH AFRICA, MAE 2006

Due to their dual targeting of both national and sectoral approaches, the funds represent steering instruments of a policy of vocational training development or skills development that made the choice of integrating the need for competitiveness at company level with that of equitable access to employment and the qualification of the entire workforce.

2.2. Training Funds in Tunisia

In Tunisia there is no State-run fund of special or autonomous status, managed by a tripartite management board (public authorities and social partners) and in charge of collecting and allocating resources according to application, selection and assessment processes implemented or decided by the fund itself.

The finance system for vocational training that can be defined as the equivalent of a fund, is essentially but not exclusively based on the implementation of three instruments for collecting and allocating resources and one budgetary management instrument called the Vocational Training and Apprenticeship Promotion Fund (FOPROFA). The Ministry of Finance supervises this fund in conjunction with the Ministry of Education and Vocational Training.

2.2.1 Collection and redistribution of the vocational training tax (TPF)

The TFP is the oldest continuing education instrument and its origins date back to the beginning of Tunisian independence in 1956. This instrument introduced in Tunisia a quantitative standard for training expenditure, based on a percentage of payroll. It concerns compulsory payment of 2%, proportional to wages and salaries paid out by the company, for all sectors except exporting companies, farming companies and companies paying a fixed occupational tax who are exempt from the levy and companies in the manufacturing industry who are subjected to this tax at a rate of 1%.

The tax is collected by the State services (approximately TND 75 million in 2004, i.e. €46.4 million) and is then redistributed through three resource allocation instruments:

- a rebate of the vocational training tax (TFP) on request for businesses who train their employees,
- the National Continuous Training Programme established to encourage training in small and medium-sized businesses,
- Article 39 established to finance training required due to technological investments.

The amount of the tax that is not reallocated through these three instruments is assigned to financing the operation costs of sectoral training centres under the supervision of the Tunisian Vocational Training Agency (ATFP).

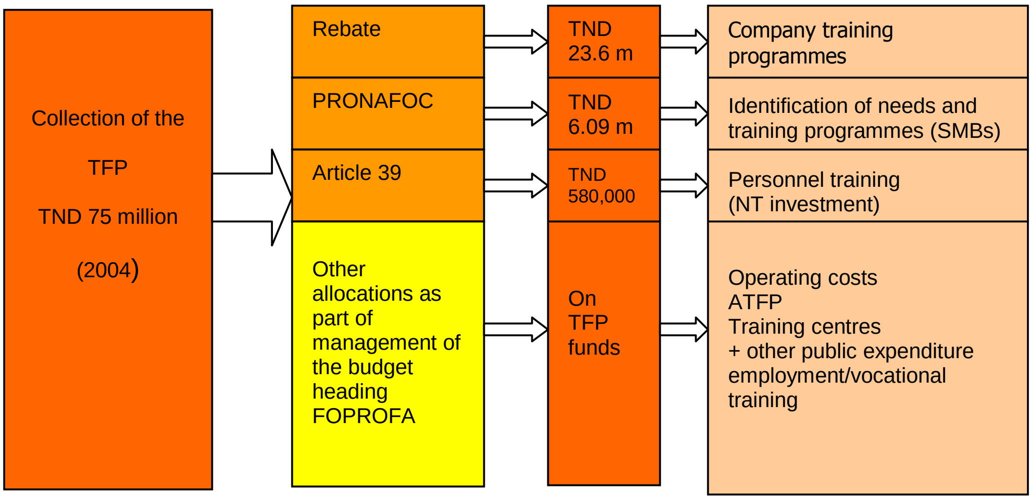


Table of TFP fund distribution in Tunisia (2004 figures), MAE 2006

2.2.1.1 . Rebate of the tax

Businesses investing in training for their personnel can request a rebate of the tax paid. The conditions for obtaining this rebate are defined by the current legislation in force. (Decree no. 2372 of 21 November 1994 setting the level for granting rebates on TFP and Decree no. 93-696 of 5 April 1993 setting the criteria for granting rebates on TFP).

Rebates on TFP are important in relation to the diversity of their field of intervention. The training expenditure that they cover concerns the following:

- the identification of training needs and the drafting of annual or multi-annual training plans,
- continuing education for further training and occupational retraining of company personnel according to different methods.

Certain company expenditure could be immediately deducted from the total amount of the tax on a declaration basis: apprenticeship contracts and compulsory training placements of the company.

The other types of expenditure (continuing education, diagnostic/analysis, company representation in commissions, expenditure for the centre integrated, etc.) must undergo an annual assessment by the National Centre of Continuous Training and Professional Promotion (CNFCPP) in order to be eligible for the rebate.

2.2.1.2. The National Continuous Training Programme (PRONAFOC)

The objective of the PRONAFOC, which was created in 1995, was to look after all the training costs of small and medium-sized businesses (SMBs) with over 100 permanent employees and whose amount of TFP was insufficient to finance training actions. The SMBs who are subjected to fixed occupational taxes are also eligible to finance from this programme.

This programme was totally overhauled in 2001 (Decree 2001-1993 of 27 August 2001) as part of a new approach aiming to carry out steering of the continuous training finance system on a demand basis and no longer on a supply basis.

The new procedures introduced within this framework state the following in particular:

- The advantages of this instrument would be extended to all private companies without exception.
- The State would look after expenditure related to the following training activities:
  - identification of training needs,

- drafting of training plans,
- realisation of training actions,
- assessment of training actions.

Although the PRONAFOC budget is taken out of the TFP funds collected, it is negotiated annually with the Ministry of Education and Vocational Training.

2.2.1.3. ARTICLE 39

The provisions of Article 39 of the code of investment incentives (Act 93-120 of 5 April 1993) stipulate in particular that businesses making technological investments can benefit from a subsidy covering 50% of personnel training expenditure. The maximum amount of this subsidy is TND125,000 and could reach TND250,000 under certain conditions.

This instrument for promoting continuous training has been subjected to modifications according to the same procedures applied to the PRONAFOC (Decree 2001-1992 of 27 August 2001), but it is important to state that it has not worked very well.

2.2.2. The Vocational Training and Apprenticeship Promotion Fund (FOPROFA)

Up until the end of 1999 vocational training funds were managed as part of the budgetary rules of the Public Treasury. As a result, the resources not used for vocational training during the year were lost due to the fact that they were integrated into the State budget and were therefore disposed of as part of their entry in the finance act.

The creation of the Vocational Training and Apprenticeship Promotion Fund or FOPROFA meant that the funds were entered under a special budgetary heading. The consequences are that these funds are specifically allocated to vocational training and can be reallocated to it continuously.

Apart from the fact that it allocates the funds exclusively to their specific purpose, the FOPROFA is a budgetary management tool that allows the Ministry of Finance, in conjunction with the Ministry of Education and Vocational Training, to modify the initial allocation of credits for each component in the course of the year. It is therefore a means to add flexibility to budgetary allocations (excluding the TFP rebate which follows strict allocation rules) and to guide them in relation to a policy and strategy-based steering of the reform.

2.2.3. The consultative role of social partners in steering the funds

The financing of training is in principle a responsibility that is shared between public authorities and social partners. In reality, this responsibility is mainly assumed by the Ministry concerned in conjunction with the CNFCPP to whom some of its responsibilities have been delegated.

2.2.3.1. Concerning the rebate

The National Training Board, presided by the Minister in charge of vocational training or his representative and which is comprised of different representatives of the Ministries concerned by vocational training, representatives from the UTICA (Tunisian Union for Industry, Commerce and Handicrafts), the UGTT (Tunisian General Labour Union), the UTAP (Tunisian Union for Agriculture and Fishing) and the UNFT (National Union of Tunisian Women), has the mission of examining rebate requests and more generally all issues related to the vocational training tax that are submitted to it by the Minister in charge of vocational training. But the social partners consulted all expressed the view that they did not really participate in the decisions made in this area.

2.2.3.2. Concerning the PRONAFOC

The adoption of decentralised management led to the creation of a continuing education commission at regional level. The said commission is in charge of examining individual company applications whose provisional cost is less than TND 50,000 as well as draft agreements related to collective applications from partners and whose provisional cost is less than TND100,000. A central commission examines the requests surpassing the aforementioned ceilings.

Both the regional and central commissions are presided over by a representative from the Ministry of Education and Vocational Training, one from the Ministry of Finance, one from the CNFCPP who is a rapporteur, one from the Ministry of Industry, one from the UGTT, one from the UTICA and one from the UTAP.

According to social partners' representatives, their powers of intervention are null or weak at central level, whereas they are real at regional level.

2.2.3.3. Concerning the FOPROFA

As the FOPROFA is a means for budgetary adjustment of funds appropriated to training, it is managed exclusively by the Ministry of Education and Vocational Training. But insofar as it intervenes as a a policy and strategy-based steering tool in the vocational training reform, the social partners request a more active role in this area.

2.2.4. Unequal access to the funds' resources

The overall resource allocation results show that, out of the TND40 million (€24.6 million) allocated to vocational training in 2004 (excluding basic training), the very large majority of funds go to a minority of businesses and, mainly to large public enterprises, contrary to the resource allocation practices in South Africa. In this way, out of 120,000 businesses contributing to the TFP, only 1,700 of them benefit from the rebate, 115 of which are public enterprises that monopolise about 60% of it. Seven public enterprises alone receive between 25% and 30% of the rebate.

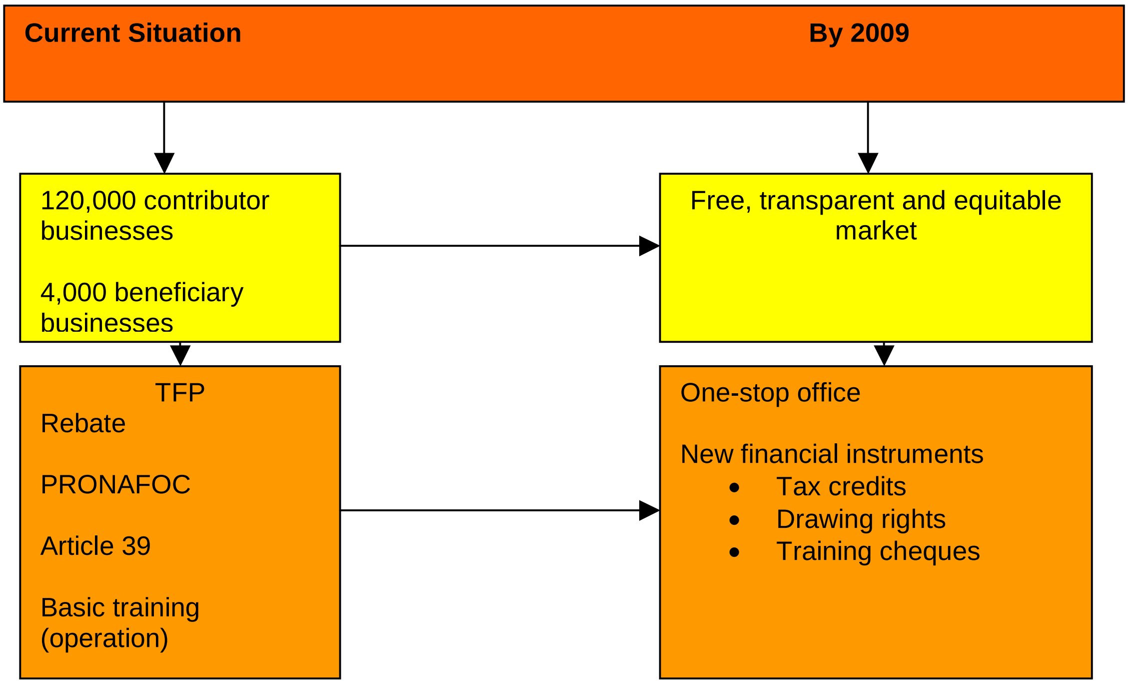
The presence of 40% of SMBs among the PRONAFOC beneficiaries does not significantly change the inequality of access to the funds' resources insofar as the programme only represents 10% of annual allocations and part of the finance that it grants comes as a complement to the rebate.

2.2.5. Conclusion: towards a strategic redefinition of finance instruments

A careful reading of the operating approach of Tunisian funds leads to the observation that the implementation of these funds leads on the one hand to the monopolisation of means available by a minority of businesses and, on the other, to finance distribution criteria that favour large businesses, to the detriment of all those, small and medium-sized ones that need to enter into the training momentum introduced by the programme to upgrade vocational training and employment, called MANFORME[3].

It emerges from this reading that all training players wish for a reform of the funds, going towards a one-stop office, towards financing that is more accessible, more equitable, more transparent and more in accordance with the objectives of the ongoing reform.

[3] Started in 1996, MANFORME is mainly based on increasing the participation of professional branches in defining skills needs in companies, on structuring the vocational training offerings based on this definition of needs, on implementing a quality approach in each phase of the training supply and demand process and on implementing active management of the employment and continuing education market.



Training Funds, TUNISIA, MAE, 2006

The presidential programme for 2005-2009 aims to establish a more efficient system of finance for vocational training through new and simplified measures aiming to help businesses and individuals take advantage of encouragements and incentives for financing training activities. For this, it proposes establishing three new financial instruments:

- The tax credit system which will mean that business expenditure in the area of vocational training can be considered as advances that are deductible from the vocational training tax.
- The drawing rights system that will give businesses participating in apprenticeships and in alternance training the possibility to benefit from the right to finance continuing education programmes for their employees.
- The “Chèque Formation professionnelle” (vocational training cheque) that will grant finance for training directly to beneficiaries through the implementation of a “Chèque Formation” (training cheque), thus leaving free the choice of training centre.

2.3. Funds for financing vocational training in Sub-Saharan Africa

Funds for financing vocational training in Sub-Saharan Africa appeared in the different texts reforming vocational training that were adopted by the national authorities at the end of the 1990s. The creation of the Support Fund for Vocational Training and Apprenticeship (FAFPA) of Burkina Faso dates back to the Act of March 1997 on the promotion of employment and vocational training, the FAFPA of Mali dates back to the Act of April 1997 and the Fund for the Development of Vocational Training and Apprenticeship (FODEFCA) of Benin appears in the national policy on continuing vocational training of February 1999.

However, whereas in Mali and Benin the implementation of the funds closely follows the texts laying down their principle – Decrees of 2 June 1997 in Mali and of 12 February 1999 in Benin – this did not happen in Burkina Faso until the publication of the Decree of 10 July 2003, over six years later.

2.3.1 The contexts of the funds' creation

Two funds benefited from World Bank support when they were created: the FAFPA in Mali and the FODEFCA in Benin. This support came through two projects: in Mali, a Vocational Training Consolidation Project (PCFP) signed in 1996 for six years and in Benin a Support Project for the Development of Continuing Vocational Training (PADFPC) signed in 2000 for four years, but extended to June 2005. These two projects were for the amounts of US $22.9 million and US $6.2 million respectively. The difference in the amounts is due to the fact that in Benin, the Bank's support was limited to the funds, whereas in Mali it included an important section on support for basic training and the creation of the Observatory for Employment and Training (which always accompanies the creation of a fund). This mainly financial support allowed the actions of these two funds to commence and ensured their finance for the first years of operation.

Furthermore, they benefited from technical support from French Cooperation also through two projects, which, without being centred exclusively on the establishment of funds, encompassed them as part of their approach: the Support Project for Vocational and Job Training (PAFPE) in Mali and the Support Project for Technical and Vocational Training (PAFTP) in Benin. The funds allocated by French Cooperation are much lower (€7.3 million and €2.1 million, including technical assistance). However, French Cooperation differentiates itself through the importance of its technical assistance and through the actions of skills development that it encouraged for executives and people in charge of training. The actions of the World Bank and French Cooperation were therefore complementary: the first one financed actions of continuing education and the second one reinforced the expertise and skills of those implementing these actions.

In Burkina Faso, the World Bank did not intervene in the area of vocational training and support from different Cooperations was based on the drafting, validation and distribution of frames of reference for apprenticeship training with the Vocational Training Support Unit (CAFP) financed by Austrian and Swiss Cooperation and support from the GTZ and French Cooperation. The only support that the FAFPA received dates back to the Support Project for Vocational Training and Craftsmen's Professions from French Cooperation (2001) who placed its technical assistance at the disposal of the Fund to draw up technical and accounting procedures.

2.3.2 Public establishments with tripartite management

The funds are public administrative establishments, empowered with legal and financial autonomy. They are managed either by a management committee (Benin, Burkina Faso) or by a management board (Mali). The composition of this body is generally "tripartite" but this term has very different meanings from one country to another: sometimes tripartism refers to the State and the social partners in the sense of the ILO (employers and employees) sometimes it refers to the State, the Fund's managers and its "users."

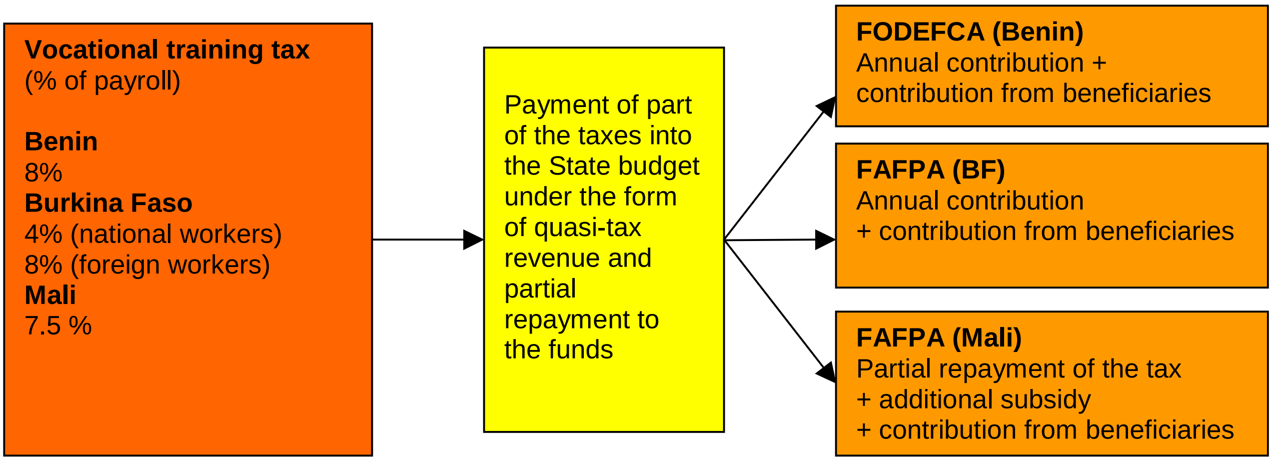
- In Benin, the management committee has 12 members: 4 representatives from employers' and independent organisations (National Employers' Council, Chamber of Commerce, Chamber of Agriculture and National Federation of Craftsmen), 4 representatives from private workers' trade unions and 4 State representatives (Finance, Plan and Development, METFP and MFPTRA). The chair of the management committee is appointed by the Council of Ministers. The management committee meets four times a year:

- In Mali, the management board is made up of 7 "user representatives," 1 representative from FAFPA personnel and 4 public authorities' representatives. The "user" representatives cover different sectors of activity: industry (National Council of Malian Employers), commerce (Chamber of Commerce and Industry), handicrafts (permanent assembly of the Chambers of Trade), agriculture (permanent assembly of the Chambers of Agriculture), construction industry and public works (National Union of Construction and Public Works Contractors) and two representatives from assemblies regrouping the support structures for SMBs/SMIs and the handicrafts industry (two NGOs: Guamina and Swisscontact). The Fund's president is elected by the council from among the users' representatives.

- In Burkina Faso, the management committee has 9 members: 4 State representatives from various Ministries (Vocational Training, Finance, Vocational and Tradespeople's Education), 5 representatives from the private sector, two of which are employers' representatives (the National Council of Burkinabe Employers and the Chamber of Commerce, Industry and Handicrafts), a representative from Employees' Trade Union Organisations, a representative from the National Federation of Craftsmen of Burkina Faso and a representative from the National Federation of Farmers' Organisations. Added to this are two technical partners (Swiss Cooperation and French Cooperation). The council is presided over by the director of monetary and financial affairs, appointed by the council of ministers.

2.3.3. Financing of the funds and their financial needs

In theory, financing of FAFPAs and of the FODEFCA comes from the reallocation of part of the vocational training tax received by the State up to a certain percentage of payroll and the contribution of training beneficiaries (between 10% and 25% of the cost of training).



Financing process for Sub-Saharan African Funds, MAE, 2006

In practice, the governments substituted the repayment of part of the tax due to the funds, with a State subsidy of a lower amount than that which should have been paid. Furthermore, financial support from the World Bank allowed a progressive increase in the use of national resources from 314 million CFA Francs in 2000, to 963 million CFA Francs in Mali and from 162 million CFA Francs to 457 CFA Francs in Benin. This support does not exist in Burkina Faso.

FAFPA ressources (Mali) 2000-2004

In millions of CFA Francs

	2000	2001	2002	2003	2004
National contribution :					
- as part of the tax	314.1	404.6	448.7	550.0	610.0
- additional subsidy	-	-	-	400.0	353.0
World Bank	1 079.7	1 149.6	771.7	-	-
Other	416.9	319.1	89.9	107.6	90.9
Total	**1 810.7**	**1 873.3**	**1 310.3**	**1 057.6**	**1 053.9**

Source : FAFPA

FODEFCA ressources 2000-2005

in millions of CFA francs

	2000-01	2002	2003	2004	2005	TOTAL
Internal ressources	162.4	63.5	112.6	378.9	456.7	1 174.1
of wich :						
National Budget	150.0	37.5	75.0	265.6	393.8	921.9
Contribution from bebeficiaries	12.4	26.0	37.6	37.6	63.0	252.2
World Bank – IDA contribution	130.0	213.9	461.2	937.8	733.9	2 467.8
TOTAL	**292.4**	**277.4**	**573.8**	**1 316.7**	**1 190.6**	**3 650.9**

Sources FODEFCA

Although it was created in 2003, the Burkinabe FAFPA did not really begin its activities until 2005 with a budgetary provision of 170 million CFA Francs.

The Malian government, responding to a request from employers and the craftsmen's federation, decided to increase the amount repaid from 0.5% to 1% of payroll. While waiting for its implementation, it granted an additional subsidy to the FAFPA. The latter hopes that the entry into force of the measure in the 2006 budget will not lead to removal of the subsidy.

The end of World Bank support meant a significant reduction in resources for both the FAFPA (Mali) and the FODEFCA. The funds' real needs, beyond applications formulated by partners, remain difficult to assess. Available data show that during the 2000 – 2005 period, the totality of resources was not used: in Benin for example, the usage rate was less than 85% for the entire period and it was lower than 80% in 2005.

In addition to the problems of long waiting periods linked to application procedures and invitations to tender on the one hand, and the difficulties sometimes encountered by beneficiaries (who may have taken out credit) in paying their contribution on the other hand, the usage rate also reflects the limits of training availability, especially in the branches that imply the existence of a minimum amount of equipment. While tensions may exist over the funds' treasury, as was the case in Mali, these are not so much the result of insufficient resources but rather delays on the Public Treasury's side in reallocating the income collected to the funds.

2.3.4 A one-stop office with transparent procedures intended to promote a vocational training market

Sub-Saharan African Funds are a one-stop office for financing vocational training. Their mission is to:

- receive and manage resources intended to finance and promote continuing vocational training and apprenticeship (FPCA),
- finance vocational training and further training actions for the currently employed workforce, alternance or apprenticeship training, carried out with the status of work and aimed at vocational integration and collective interest projects aimed at vocational integration or improving productivity,
- contribute to financing studies aimed at defining and directing a coherent policy of continuing vocational training and apprenticeship in relation to the needs of the economy,
- promote, through information and the necessary support, the development of continuing vocational training and apprenticeship,
- support businesses, craftsmen and economic operators in modern and informal sectors, whether or not they are regrouped within professional organisations, with a view to helping them define their training and further training needs and draft their training plans and programmes,
- support vocational training operators as part of the implementation of their programmes of investment in human and material resources and upgrade the skills of instructors and training bodies.

In other terms, in response to technical education that is considered to be too academic and whose contents are disconnected from economic realities, the creation of the funds is in keeping with a double break from the previous situation: on the one hand, moving from a supply-based approach dominated by technical education to a demand-based approach driven by professionals' needs, and on the other hand, promoting a vocational training market through the implementation of transparent procedures for invitations to tender and if need be, by prohibiting public establishments from responding under the pretext that their State finance distorts competition. The creation of an Observatory for Employment and Training (OEF) accompanying the creation of a fund was intended to provide precise information on craftsmen's and companies' needs, and therefore training applications.

The facts have only partly fulfilled the expectations of the funds' promoters: the OEFs have either been joined to the ANPE - National Employment Agency (Benin, Mali) or to the Chamber of Commerce, Industry and Handicrafts (Burkina Faso) and do not operate in compliance with the initial projects or those being launched. The training market has not really developed, except in some tertiary professions that need very little in the way of equipment and permanent instructors. The demand for training, which is formulated with great difficulty, is sometimes held up by application procedures defined by the World Bank in exchange for its support. It remains however, that the central objective that aims to promote the idea of vocational training has been affected. In this regard, the funds play an important role by pooling finances and by making demand effective.

2.3.5 Apprentices and craftsmen are the first beneficiaries of training

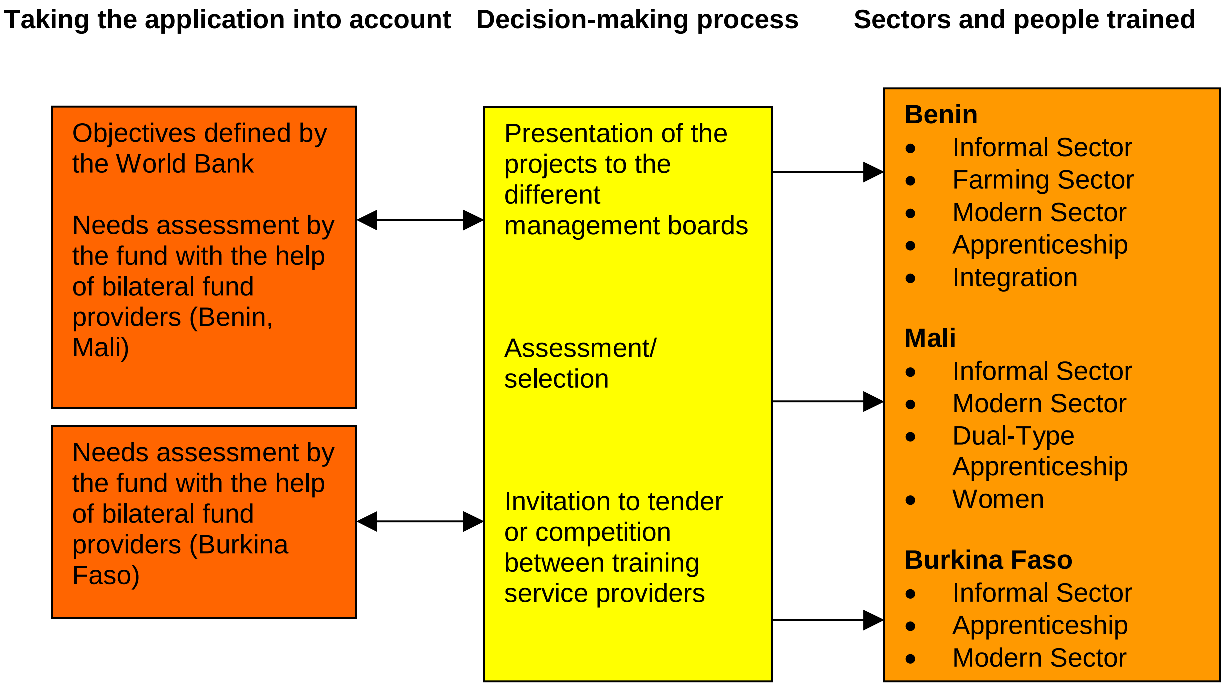
In exchange for its financial support, the World Bank asked both the FAFPA (Mali) and the FODEFCA to give priority to training actions for the informal sector, young people who have left school early and people in difficulty. For its part, Swisscontact (Benin and Mali) or Swisscontact in conjunction with Austrian Cooperation (Burkina Faso) promoted training within the funds, intended for apprentices and craftsmen in the form of dual-type apprenticeships (practical and theoretical). This approach continued beyond the Bank's involvement in the countries where it intervened. Overall, the training action mainly benefited the craftsmen's sector and more so apprentices than craftsmen employers.

In Mali, during the period of the Bank's intervention, between 1997 and 30 December 2002, 614 apprenticeship training courses were financed in 18 professions. Some 20,959 people benefited from these, 6,167 of which were women, for a total cost of 1.57 billion CFA Francs, over three years, in other terms an average cost of apprenticeship training of 130,228 CFA Francs. The modern sector, for its part, benefited from 478 actions for 215 businesses and 5,193 people, only 339 of which were women. 52 spheres of competence were listed. The cost of training came to 1.78 billion CFA Francs for an average cost of 342,400 CFA Francs, in other terms, a little more than two and a half times that of apprenticeship training.

In 2004, when the Bank no longer intervened, on an initial forecast of 3,310 beneficiaries, the actions carried out concerned 2,752 people with a total cost of 585.5 million CFA Francs. The informal sector remained the main beneficiary of FAFPA actions with 2,229 people trained for a forecasted 2,130, 22% of whom were women, and a cost of 224.9 million CFA Francs for the FAFPA (i.e. an average cost of 132,538 CFA Francs). Dual-type apprenticeship was favoured with 112 training sessions as opposed to just 42 for further training of master craftsmen.

The modern sector benefited from 54 actions for 523 people and a cost of 209.8 million CFA Francs for the FAFPA, i.e. an average cost of 554,575 CFA Francs or 3.5 times that of the cost of training for craftsmen. This difference is the result of the individual nature of the training financed by companies for one or a few employees (preference given to training courses grouping together several companies, which was badly viewed by the FAFPA).

In Benin, the World Bank had set the objective of 25,000 beneficiaries for the FODEFCA over 4 years. This was reduced to 20,000 half way through. The beneficiaries were broken down as follows: 3,200 for the modern sector, 5,600 for the non-agricultural informal sector, 6,400 for the agricultural sector, 4,000 for apprenticeships and 800 for integration into the working environment.



The main beneficiaries of the Sub-Saharan training funds, MAE, 2006

On 30 June 2005, date on which the World Bank ended its support, 22,354 people had been trained, in other terms slightly more than the revised objective. The informal sector was the main beneficiary of financing and the planned objectives were largely surpassed with 10,811 people trained in the agricultural sector, 6,591 in the non-agricultural sector, and 1,516 apprentices. However, the actions intended for integration into the working environment only benefited 561 unemployed people. Finally, 2,875 people were trained in the modern sector and therefore its objective was reached by 90%. Nonetheless, this sector is not sufficiently documented to voice an opinion on the businesses concerned (it concerns anything from a modern bakery with one or two employees to large businesses) and the nature of the training given. The obligation for companies to establish a training plan, included in the law being drafted on continuing education, could lead them to call on the funds more in the future. However, the objective of 60% of training actions in favour of women was not reached; the percentage of female beneficiaries being only 29.7%. In retrospect, the objective was deemed to be too ambitious, which it was, but a better result could have been reached if it had been accompanied by specific actions to raise awareness among this public.

In Burkina Faso in 2005, the first actions were financed in favour of craftsmen's and apprentices' training, with amounts representing 50% of available funds. 2006 should be the first year of full operation for the funds and thus this should allow the full budget available to be allocated.

3. Common parameters for analysing and comparing the funds

The survey missions in the five countries chosen gave rise to country reports, whose most significant parts feature in the annex. These reports are all structured according to a common questioning of the institutional reality of the funds, the role that public and social players have in them, the methods for gathering and allocating resources, the assessment, selection and finance processes of training actions and the capacity of these actions to fulfil economic and employment demand. A cross-spanning examination of the funds led to the identification of a certain number of relevant parameters or analysis criteria in relation to those which differed from or were similar to the strategic and operational objectives of the funds, their modi operandi as well as the relevance of the results targeted and those achieved.

3.1. Differences of economic level greatly structured the funds' objectives

If one just considers the funds' objective which was to finance continuing vocational education and apprenticeship training, then there is no difference between them. All the funds fulfil this first objective in their own way. But if one wishes to understand the nature of the training thus financed, then the economic context is a major factor of differentiation. Given the fact that the funds are supposed to fulfil the needs of the economy, it is not surprising that in the Sub-Saharan African countries where "informal"[4] employment represents between 80% and 90% of employment and where the educational level is low, the training of craftsmen is predominant, whereas in the semi-industrialised countries such as Tunisia or South Africa, where the industrial sector represents 25% and 30% of employment respectively, with, in both cases an important modern services sector, applications submitted to the funds come more from the "modern" sectors. De facto, the funds must respond to different skills needs.

In Sub-Saharan Africa, the idea that reigned on the creation of the funds was not however, in this frame of mind. In the 1990s, fund providers were persuaded that the privatisation programmes and the structural adjustment plans would stimulate the development of a private modern sector. It therefore concerned supporting the creation of private businesses by allowing them to find trained employees on the work market. We know that the effect of this policy, on the contrary, led to a contraction of the modern sector at the same time as the public sector and boosted the development of the handicraft sector.

The World Bank had to adapt to this situation by reintegrating de facto the funds into the Strategic Frameworks for Poverty Reduction (CSLP) that it had encouraged in order to fulfil the Millenium Development Goals. In exchange for its support for the FAFPA in Mali and the FODEFCA in Benin, the Bank in this way imposed that a major share of finances granted would benefit young early school leavers, people in difficulty and craftsmen from the informal sector.

On the contrary, the Tunisian and South African funds are part of a framework of increasing integration of these countries' economies into the world market and aim to satisfy the demand for intermediary qualifications and to reduce little qualified jobs that remain the majority in these countries (60% of Tunisian jobs). The funds are directly engaged in the development of the industry, or even, as in Tunisia, in the of "Article 39 provision," through technological investments, or as in South Africa, in the development of essential or high priority skills in the strategic sectors, under the joint impetus of employees' and employers' organisations.

3.2. The funds' structuring relationships with basic training

Because of the way they were designed, the funds for financing vocational training position themselves as tools to finance training for life-long training. Their relationship with basic training is just as strong. Their intervention method depends greatly on the extent of the basic training field, and especially on the inclusion or exclusion of vocational training in this field. In this regard, Sub-Saharan African countries that integrate technical education into basic training differentiate themselves both from Tunisia and South Africa. Tunisia has transformed technical and vocational education into an alternance vocational training mechanism, based on the needs of various economic players, especially sectoral, for skills and qualifications, whereas South Africa, as part of its implementation of

[4] Although this term is often used in literature, it needs to be explained. Informal touches on both activities that are little organised and possibly undeclared work. This is not the case. The "informal" sector covers handicraft production or service activities that come under a certain form of organisation in the countries surveyed. Some of the businesses are legally declared and pay a "synthetic" fixed tax in the sense that it represents the different taxes determined for large businesses. It would be more precise to talk about a "traditional" sector or micro and small business sector, which, for want of being able to pre-determine the possible evolution of the demand it will receive beyond one week or one month, is unable to invest in expensive capital assets or to invest either in permanent employees or equipment.
In statistical terms, the informal sector is defined as all production units devoid of an administrative registration number and/or formal book-keeping (INSEE/AFRISTAT).

sectoral funds (Sector Education and Training Authorities or SETAs) has designed a training mechanism for employees and young people seeking vocational integration based on the acquisition of skills in a working situation. This mechanism is gaining ground in the educational system's Colleges of Further Education and Training.

3.2.1. The funds and the financing of dual-type apprenticeships

This relationship that the funds have with basic training is reinforced by the vocational training reforms that gave rise to their creation. In almost all the countries studied, vocational training appears either as a means in a working situation to acquire knowledge and professional skills that are not (or are badly) taught in an academic structure, or as a tool used both by individuals and companies to help them adapt to professional evolutions.

In the Sub-Saharan African countries, the importance of training needs for the handicraft sector has led the funds to finance both apprentices' and craftsmen's training courses, in varying proportions. The former are explicitly part of basic vocational training whereas the latter are very much a part of continuing education. The fact that in dual-type apprenticeship, which developed at the end of the 1990s in this part of Africa, placing young people into apprenticeships is subject to prior training of master craftsmen, means that basic training and continuing education are closely intertwined. However, the situation differs from a finance point of view, depending on whether or not the country has promoted a national policy on dual-type apprenticeship as an integral part of basic training.

There is another type of link between the funds and basic training which comes from the fact that not all types of vocational training are available to everyone. A minimum level of knowledge is necessary to take full advantage of a vocational training course. It is a mistake to oppose general training and vocational training, as is done too often. The first makes the second possible. In Sub-Saharan Africa, where the national languages are little instrumented in technical terms or even in written terms, a command of French is an entry condition for dual-type apprenticeship training. Furthermore, a minimum school level is required to ensure that the apprentice masters basic operations, that he can carry out measurements, understand what a geometric figure is (square, triangle, right perpendicular, etc.).

In this regard, the case of Benin is exemplary. The Beninese authorities' implementation of a complete institutional and legal framework in favour of dual-type apprenticeship, has led the Ministry of Technical and Vocational Education and Training to take charge of financing the training of apprentices and "endogenous" instructors (instructor craftsmen). While the mechanism benefited from financial support from French and German Cooperation in its early years, since 2006 the Ministry has entered the necessary credit into its own budget which leads to the hope that there will be continued and structural development of apprenticeship and the progressive move of Technical and Vocational Education and Training (TVET) towards the real needs of economic players. Up until now the FODEFCA has not yet fully drawn conclusions, and it finances both craftsmen's training courses (continuing education) and apprenticeship training courses (basic training), especially in the framework of projects developed by Swisscontact. FODEFCA's specialisation in continuing education of craftsmen would however be part of the logic of distributing roles between the Ministry in charge of apprentices and that in charge of continuing education (of craftsmen or not).

The cases of Mali and Burkina Faso are different. There is in fact, no national policy in favour of dual-type apprenticeship linking theory and practice. This is developed at the initiative of craftsmen's associations supported by certain fund providers such as GTZ, Swisscontact and French Cooperation. Even when the theoretical training of apprentices is carried out within public or private technical education establishments, and by technical teachers, it does not have the same status as that of technical education. What dominates here, in fact, is less the status of training than the working situation that differentiates an apprentice from a student in technical education. As a result, the Ministry does not look after this type of training. Only the existence of a fund with significant finance allows the development and the generalisation of dual-type apprenticeships.

3.2.2. The funds' support for the implementation of veritable vocational training mechanisms

From 1990 to 1994, Tunisia underwent great vocational training reform. It resulted in the regrouping of all vocational training tools under the supervision of one Ministry for Vocational Training and the creation of four specialised institutions: Tunisian Vocational Training Agency (ATFP), the National Centre for the Training of Trainers and for the Development of Training (CENAFFIF), the National Centre of Continuous Training and Professional Promotion (CNFCPP) and the Tunisian Employment Agency (ATE which became ANETI). A framework law in 1993 defined the legal framework for continuing education and vocational adaptation. In 1995, the public authorities adopted an important national strategy to upgrade vocational training and employment, known as the MANFORME programme. This promotes, in the place of TVET, the creation of a veritable vocational training mechanism based on alternance and skills-based training and on an approach of partnership management between public authorities and professional branches.

Management of the tax rebate, which existed before the reform, was redefined in 1993 in order to incorporate the objectives determined for continuing education into the framework law. Article 39, which sets the conditions of responsibility for personnel training costs following technological investments, was redefined in 1996 in order to better correspond to MANFORME's approach. The PRONAFOC, which was intended to mainly promote training in small and medium-sized businesses, was created in 2001 in order to support the efforts of these businesses in the area of improving their employees' skills and qualifications. The FOPROFA was created in 2002 in order to better direct the funds available (and especially the large remainders of the tax collected) towards the different forms of expenditure relative to basic vocational training and apprenticeship training. There was therefore a real adjustment of the financial instruments in order to facilitate the creation of a veritable vocational training system in Tunisia, even if the results of the field survey show that the current implementation conditions for allocating resources no longer play a real role of support for MANFORME.

Relations between the funds for financing vocational and basic training are just as close in South Africa, with the only difference being that continuing vocational training and apprenticeship, which both developed through the implementation of financial instruments, participated in the emancipation of black people whereas technical and vocational education given by the educational system was exclusively controlled by white people.

With regards to the current situation we could consider that the progressive establishment of a structured policy of continuing education and apprenticeship had the effect of transforming the educational system and the basic training that it was implementing.

- In 1981, under the pressure of demands from black trade unions, which had just been created, the government adopted the Manpower Training Act which allowed black workers access to apprenticeships, which until then had been strictly reserved for white people and some intermixed groups. At the same time, the law created a National Training Board that would remain in the hands of white and some intermixed and Asian people until 1990 when the integration of black trade union representatives coincided with the freeing of Mandela.
- Also in 1990, the State amended the Manpower Training Act and established the Industrial Training Boards (ITBs) based on the British model. Their mission was to manage apprenticeship and to this end they established the first voluntary funds in order to finance training through the voluntary contribution of businesses.
- Other financial instruments followed (establishment of a fund by the Ministry of Labour for job seekers, businesses looking after the training of their employees, training of the unemployed by NGOs using funds donated, etc.) which in 1995 led to an important international study on the opportunity and the methods for establishing a training fund in South Africa. The idea of a levy on payroll and the dual use of this levy for employees and unemployed persons was pushed forward by trade unions and the Department of Labour against the opinion of employers.

The debate on financing over these years led to the creation of a whole set of legal and institutional decisions that made it part of an approach of close partnership with public authorities, social partners and civil society representatives and of an overall structure based on a standardised quality and accreditation system for all the stakeholder institutions.

The following were thus adopted and successively implemented:

- The South African Qualifications Authority or SAQA (1995) whose goal was to establish quality standards common to both basic training and continuing education.
- The Skills Development Act of 1998 which outlined the current institutional landscape: the NSA (National Skills Authority) which took over from the National Training Board, the SETAs (Sector Education and Training Authorities) which replaced the ITBs (Industrial Training Boards) and the NSF (National Skills Fund) which formalised the financial instrumentation created by the Ministry of Labour for the unemployed.
- The Skills Development Levies Act of 1999 which introduced payment of a levy of 1% on company payroll (actually came into force in 2001). This levy initially applied to all businesses with a payroll in excess of R250,000, then, from 2005 onwards, to those with payroll in excess of R500,000.

All this legal and organisational construction established de facto a system for financing and implementing methods for vocational training that can be summed up as follows:

- The development of both employees' and unemployed people's skills is through training actions that include a skills acquisition period within a company.
- The necessary training is financed if it is in the form of "learnerships" i.e. a flexible form of apprenticeship comprised of the dual assessment of skills acquired in a working situation and the knowledge and skills acquired in theoretical training. "Learnerships" should lead to a contract between the trainee, the employer and the training provider and be approved by the SAQA as part of its equivalence to a recognised qualification or elements of qualification.

The result of all these measures was to encourage the creation of a Department of Education and Training in 2000, within the Ministry of Education, to structure all training carried out by the Ministry based on the national qualifications framework established by the SAQA, to strengthen links between school establishments and businesses and, finally, to begin the implementation of alternance training periods in businesses. At third level, the recent merger of universities and technikons (Universities of Technology) and the introduction of some in-house company training into the university curriculum bear witness to the general impact that the combined policy of vocational training development and finance had on the entire educational system.

3.3. The variable allocation of payroll levies to financing vocational training

Wherever a fund exists, its finance is theoretically covered by payroll levies. These levies are sometimes longstanding as in Tunisia (1956) and Sub-Saharan Africa and sometimes they are recent as in South Africa. The most longstanding ones were created independently of the funds and constituted a quasi-tax that financed the State budget, but it was not necessarily used to finance vocational training.

3.3.1. The multi-faceted destination of the levy in Sub-Saharan Africa

While the levies are always taken from payroll, their rate sometimes does not have any relation to that intended to finance the training funds. Thus, the rates of the levy are as follows:

- 7.5% of payroll in Mali, 0.5% of which is allocated to the FAFPA (increased to 1%)
- 8% of payroll in Benin without a fixing of the percentage of payroll allocated to the FODEFCA
- 8% of payroll of foreign employees and 4% of payroll of national employees in Burkina Faso without a fixing of the percentage of levies allocated to the FAFPA
- 1% in Tunisia for manufacturing industries and 2% for all other sectors with the exception of export businesses, farming businesses and businesses paying a fixed occupational tax who are exempt from the levy
- 1% in South Africa, for all businesses with an annual payroll in excess of R500,000.

The quasi-tax nature of the levy

The existence of a "vocational training" levy created without any relation to it and with a high rate, is the first cause of difficulty in Sub-Saharan Africa. Its collection is in fact looked after by the tax offices to finance the State budget. Allocating all or part of the levy to the existing fund would mean depriving it of part of the expected resources. Up until now the Ministers of Finance have been against recognising that part of the tax collected (equivalent to the tax on wages provided for by the texts creating the funds) could be automatically paid to them. In all countries, the Minister of Finance prefers to grant a subsidy that is supposed to represent the amount of the tax due. It is he who eventually decides the amounts of resources allocated to the funds. In reality, the contribution is always less than this amount: in Mali, the payment is the equivalent of 0.5% of payroll (which should be brought to 1%) and is completed by an additional subsidy. In Benin and in Burkina Faso, the contribution is totally disconnected from any relationship with a percentage of payroll.

The gravity of the issue raised by non payment of the total levied amount was overcome in the early years by the financial help given by the World Bank to the FAFPA in Mali and to the FODEFCA in Benin. It was then lessened by the funds' incapacity to assess the real needs of economic players and to respond within a reasonable timeframe to the training requests without increasing the already high management costs. Data available thus show that during the period from the creation of the funds up to the end of 2005, that resources exceeded expenses on the whole. All these data did not encourage the Ministers of Finance to increase their contributions. This gap between income and expenditure does not necessarily mean that the funds have abundant cash flow. Indeed, in Mali and Burkina Faso, major delays in payment of the State subsidy have created pressure in the fund's cash flow. However, as a result, neither the low tax base nor the low amount of the rate repaid seems to have been an obstacle preventing the operation of these funds, for the moment.

The distribution of resources among the formal and informal sectors

The second difficulty in Sub-Saharan Africa is linked to the fact that, while the modern sector is the only contributor, the handicraft sector is the main beneficiary of the resources collected. An increase in dual-type apprenticeship training requests can only heighten this imbalance. In Mali, the National Craftsmen's Federation highlighted the fact that the "synthetic" flat rate tax that the craftsmen pay incorporates their contribution into the apprenticeship tax. But, on the one hand, this contribution is not taken into account in the repayment to the fund and, on the other hand, its amount might be low in relation to the modern sector's contribution. In this way, the modern sector pays for the handicraft sector, and to a lesser extent, for agricultural and rural training courses. There is no opposition to the affirmation of this solidarity between sectors in any of the countries.

In Mali and Burkina Faso, certain players have even defended this solidarity on the grounds that the formal sector sub-contracts many of its activities to the informal sector and in this way makes a substantial profit out of it. Nevertheless the issue of the representativity of the modern sector's contribution is clearly raised in Mali. It will be all the more so as finance needs for dual-type apprenticeship increase. The same issue is also raised in Burkina Faso, but to a lesser extent. The National Craftsmen's Federation intends to answer it by creating a mutual fund financed by its members and likely to look after part of their training expenses.

3.3.2. Exclusive allocation of the tax to training in Tunisia and South Africa

In Tunisia and in South Africa, the situation is very different. External fund providers have never intervened and even though the tax is collected by the tax offices it is reallocated to the funds for training needs exclusively. The modern sector that pays is also the one to mainly benefit from the tax even though in South Africa, part of the tax is also used to give young people and job seekers a qualification in preparation for their integration into the working world. In Tunisia, where the funds are not paid to the informal sector, some training actions in the handicraft sector are financed through the PRONAFOC. Imbalances between those who pay and those who benefit from training do exist, but they are imbalances between businesses (in Tunisia, out of 120,000 contributory businesses, only 1,700 benefited from the rebate, 115 of which were public enterprises monopolising 60% of it and only

2,250 of which were small and medium-sized businesses under the PRONAFOC programme) and between sectors, as in South Africa, due to a lack of balancing out of the amounts collected.

In Tunisia, vocational training funds were managed as part of the budgetary rules of the Public Treasury up until the year 2000. As a result, the resources not used for vocational training during the year were lost due to the fact that they were integrated into the State budget and were therefore disposed of as part of their entry in the finance act. The creation of the FOPROFA meant that the funds were entered in a special budgetary heading. Consequently, these funds are specifically allocated to vocational training and can be reallocated to it continuously.

Apart from the fact that it allocates the funds exclusively to their specific purpose, the FOPROFA is a budgetary management tool that allows the Ministry of Finance, in conjunction with the Ministry of Education and Vocational Training, to distribute the credits in the course of the year between the different beneficiaries of training finance. In this way, whenever the need is felt, the Ministry of Education and Vocational Training can carry out an adjustment of budgetary allocations that are out of sync in relation to the determined objectives and the aspirations of the businesses and the public in question.

Furthermore, since August 2001, the National Centre of Continuous Training and Professional Promotion (CNFCPP) has been given the real management of the National Continuous Training Programme (PRONAFOC). In this respect, it plays a role of encouraging or organising the use of the funds insofar as 40% of budgetary means attributed to the programme are not used as a finance complement by the businesses in addition to rebate means, but are actually allocated to small businesses or small business associations, often not paying the vocational training tax. According to information directly gathered at the CNFCPP, the Centre is said to have generated several conventions with trade associations and/or other business groups with a view to integrating craftsmen and small production and service units into the financing of the PRONAFOC. It appears therefore as a necessary player in the implementation of existing financial instruments with an undeniable authority to manage, intervene and advise. However, its role is criticised by social partners given the fact that they are not involved in its decisions.

In South Africa, the funds collected are allocated to SETAs in relation to the size and number of businesses registered in each sector, without there being any equalisation between the sectors. In the case where companies belong to several sectors, the number of employees attributed to each one makes the difference. The tax is however collected by the Public Treasury (Revenue Service) who transfers it to the Ministry of Labour (General Directorate of Labour) who then distributes the amount among SETAS (0.8% of payroll for financing company training actions) and the NSF (0.2% of payroll for financing national actions for fighting unemployment and the social integration of discriminated people). Public administration does not participate in the tax or in its redistribution, but is required to budget the equivalent of 1% of its payroll for its own training needs.

3.4 The tripartism displayed is dominated by public authorities and weakened by the nature of the players' representation

The role of social partners in the management of funds for financing vocational training is confirmed everywhere, but it often remains consultative. The legitimacy of employers' and employees' representatives as the privileged discussion partners of the State is, in addition, lessened by the fact that most management boards include among their members the representatives of various categories of training users.

3.4.1. The pivotal role of social partners in South Africa

This situation is the result of history and the emergence of the first black workers' trade unions following the 1973 strikes. Initially in the hands of just employers' organisations, apprenticeship training progressively came under the joint control of workers' and employers' organisations. These are present both within the National Skills Authority (NSA) and the SETAs. In the former, they sit beside State representatives, who have a large majority (19 seats out of 29) whereas in the latter, they are present on an essentially equal basis.

The SETAs' management board only intervenes in an autonomous fashion in the management of discretionary funds, which only represent a quarter of the amount of the tax received (0.2% out of the 0.8% that the sectoral funds receive). The running of this board, which should focus exclusively on the issues of developing skills and vocational training, is sometimes hindered by the inclusion of social conflicts (that have not been resolved at sectoral level) in the debate. For employers, this situation is worsened again by the low trade union representation especially due to the absence of expertise among their representatives in the field of vocational training.

In this way, employers referred to a document in the process of adoption, entitled "Code of conduct for SETA Board Members" whose objective is to determine the profiles of members who are most apt to participate in SETA management boards and especially to set the conditions according to which these members would bring the necessary added value to the good governance of sectoral funds. Featured among the conditions is the need for board members to carry out regular investigations on the priority skills of sectors and on the way in which to acquire them efficiently.

3.4.2. The dual positioning of social partners in Tunisia

The situation is more paradoxical in Tunisia than in South Africa. Even though they are present in the various institutions linked to resource allocation (National Training Commission for rebate requests, National and Regional Continuing Education Commissions for the PRONAFOC), social partners play, at best, a consultative role, the decisions being made essentially by public authorities' representatives. Only the regional allocation of finance by the PRONAFOC seems to associate the social partners in an active and responsible manner.

The partnership initiated by MANFORME on a contract basis with social partners represented by their respective professional federations is however, much more effective and allows us to speak of a "Tunisian model of partnership management of vocational training."

Thus, from 1996 onwards, partnership conventions were able to be signed with each of the 15 UTICA federations (Tunisian Union for Industry, Commerce and Handicrafts) with the FTH (hotel industry), the FTAV (travel agents), the APB (banks) and the UTAP (agriculture and fishing) signing later.

The partnership then materialised, according to the terms of a text by the Ministry of Education and Vocational Training from April 2004, "through the definition and the negotiation of common stage objectives and the establishment of follow-up mechanisms. It focused on all aspects that link training to businesses, i.e. the different chapters allowing the development and maintenance of human resource skills such as basic training, particularly through alternance and apprenticeships, continuing education and the introduction of the renovated managerial method of Human Resource Management."

More concretely, the partnership developed around the following strategic points:

- the implementation of restructuring, creation and then steering processes for vocational training centres,
- the structuring of the demand for skills thanks to appropriate training engineering,
- the development of alternance and skills-based training in businesses,
- the development of new human resource management policies.

This partnership is however not yet completely finalised insofar as it should soon lead to the formal recognition of the role of social partners as players involved in their own right in the autonomous management of sectoral centres. It has, at the same time, entered a new active phase thanks to the ongoing modernisation of human resource management in companies.

The survey has shown that the social partners were fully aware of their difference in position in the funds' distribution and in the implementation of the MANFORME programme, and that this antagonism could be detrimental to the success of the ongoing reform, if only because the analysis of resource allocation clearly shows that the finance from the tax mostly reinforces the existing training supply and that it does not redirect it towards carrying out MANFORME's strategic objectives.

3.4.3. Towards affirming social dialogue in Sub-Saharan Africa

In Sub-Saharan Africa, the issue of the role of social partners is raised differently. On the one hand, the definition of “social partners” does not mean the same thing everywhere. While in Benin and Burkina Faso the notion covers the representatives of employers' and workers' organisations, in Mali, the term “users” or stakeholders is the one used instead. In all these countries, alongside the representative of national employers’ councils (and the representative of an employers’ trade union from one sector, the construction and public works sector in Mali, as it happens) and national craftsmen’s federations, commercial organisations can be found: the permanent assembly of Chambers of Commerce, Industry and Handicrafts in Burkina Faso, permanent assemblies of the Chambers of Commerce and Industry, the Chambers of Agriculture and the Chambers of Trade in Mali. The latter are often in the majority: thus in Mali, the National Craftsmen’s Federation of Mali, which sat as long as the Permanent Assembly of the Chambers of Trade (APCMM) had not been created, has been excluded. On the occasion of the revision of the text organised by the FAFPA, it could rejoin the APCMM. When these bodies are represented by their president, it is an employer, but when they are represented by their secretary general, it is a civil servant appointed by the State (who presides over the fund, as in Mali).

The representation of workers’ unions only complies with real tripartism in Benin. In Mali, workers’ unions were until now absent from the FAFPA management board and the issue of introducing a representative was being debated at the end of 2005. Finally, in Burkina Faso, the Trade Union Confederation of Burkina Faso (CSB) only has one representative in response to one employers’ representative and a second representative from the Chamber of Commerce, Industry and Handicrafts. Only within the management board of Benin are the employers and the State are on an equal footing with (four representatives each). Finally, due to the exiguity of the modern sector, the representativity of trade union organisations is often weak and marked by the culture of the public sector.

In the two Funds (FAFPA in Mali and FODEFCA in Benin) where the World Bank intervened by conditioning its financial aid on objectives it had determined for beneficiaries, the role of management boards or management committees was reduced. This role did not generally involve the approval of projects, except when it concerned large amounts, in which case the Bank's approval was required and for very large amounts the decision belonged to the Minister. The boards play an important role however, of management and financial control.

Nevertheless, one can witness the desire among social partners to play a more active role:

- In Burkina Faso, a working group of employers and trade unions was established with a view to defining together the guidelines and the financing of training. The Ministry of Labour is also negotiating with employers and trade unions in order to come to a consultation agreement between both parties on vocational training.
- In Benin and Mali, agreements were signed or were in the process of being signed between employers, represented by both the National Council of Employers and the National Craftsmen's Federation, and workers' organisations in order to promote vocational training.

In Benin, an agreement was signed on 20 October 2005 between the National Employers’ Council, the National Federation of Craftsmen and the three trade union organisations (the Confederation of Autonomous Trade Unions, the House of Workers’ Trade Unions and the National Union of Workers’ Trade Unions). This agreement defines the objectives and the means that the social partners have to promote vocational training. Thus, “conscious that the development of training is a major issue for Beninese society and sharing the ambition and the will to ensure in a decisive and effective manner the access for everyone to life-long training, the signatory parties having the objective of:

- allowing each employee to be a player in his/her vocational evolution thanks to a rigorous needs identification approach,
- developing access for workers to vocational training actions, carried out all throughout their professional lives as part of the training plan drafted and implemented in the company and developing an individual right to training, implemented at their initiative, in liaison with the company,

- increasing the volume of training actions by creating the proper conditions to allow these actions to take place during or outside working hours."

However, the agreement does not define the methods for financing training actions, but plans to "carry out an examination of the methods and the impact of moving from a fiscal obligation to a conventional obligation as regards the apprenticeship tax."

Likewise in Mali, the National Employers' Council of Mali (CNPM), the National Federation of Malian Craftsmen (FNAM), the National Workers' Union of Mali (UNTM) and the Confederation of Malian Workers' Unions (CSTM) drafted a declaration, in November 2005, the "Bamako Declaration" (in the process of being signed at the time of the survey), in which these organisations were committed to "joining their efforts to give momentum to vocational training, creating a new social dialogue, encouraging a certification of skills acquired in vocational training and making vocational training systematic as part of access to employment."

They requested that the State "define the role of joint authorities and the framework for the management and promotion of vocational training." They requested a tripartite management board made up of 12 members, with one third for employers and craftsmen, one third for workers' organisations and one third for the State. In exchange, they proposed, at the instigation of the CNPM, an extension of repayment of the vocational training tax to the synthetic tax paid by craftsmen.

These agreements or evolutions owe a lot to the action of French Cooperation from two points of view. On the one hand, the support projects for vocational training carried out in Mali, Benin and Burkina Faso, led to training actions for board members and gave them the necessary skills to allow them to play an active role. On the other hand, the French social partners (MEDEF, UIMM, FO, CGT and CFDT) supported their Malian, Beninese and Burkinabe counterparts in the drawing up of agreements or draft agreements. Even if the theme of life-long training and the methods for implementing it seem to be too close to the French "model" and mainly out of sync with the needs and resources of these countries, this support has the credit of raising awareness of both the need for dialogue between employers and employees both in the modern and traditional sectors, and the importance of vocational training whatever its form (apprenticeship or continuing education).

3.5. Survey procedures implemented seek a balance between transparency and economic efficiency

There are major differences in the design and implementation of survey procedures between Sub-Saharan Africa, Tunisia and South Africa. Those implemented, especially in Benin and Mali bear the mark of the World Bank whereas the Tunisian and South African finance mechanisms pertain mainly to training policies determined at a national level.

3.5.1. From the invitation to tender to the transparent organisation of the market in Sub-Saharan Africa

In the Sub-Saharan African countries that were supported and financed by the World Bank, the survey procedures implemented aimed to ensure the transparency of the choice of successful tenderer and to encourage the creation of a market of continuing education through a competitive offer. They are based on three provisions:

- An application for finance presented by a legally declared promoter (craftsmen's or company association) and backed by an expert or a training counsellor who helps to formulate the request.
- The fund's organisation of an invitation to tender to which at least three service providers must respond. In the case where there are less than three responses, the market cannot be attributed and the invitation to tender must be relaunched. After three failures, a single tendering procedure can be implemented.
- An accreditation procedure for training bodies.

The launch of the training action can only happen when all beneficiaries have paid their contribution (25%, 15% or 10% of the training cost). Two conventions are then signed by the fund: the first one with the promoter, who defines the nature and the characteristics of the training actions, the obligations of each party, the description of the training module, the list of beneficiaries and the cost of the training; the second one with the service provider, who retains the characteristics of the training, the description of the training module and the particular provisions of its execution (place, periods, training length, list of people involved).

The Burkinabe FAFPA, which was launched with just the help of European Cooperations, goes through the same procedure of applying for finance and accreditation with the noteworthy exception that it has never organised an invitation to tender. Up to now it has authorised mutually agreed contracts between an applicant and an authorised service provider after a qualitative assessment of the relevance of the offer content presented and of its financial optimisation. It does not envisage resorting to invitations to tender in the future due to the exiguity of the training market, but also for the reason that this procedure might unnecessarily lengthen the response time without necessarily adding extra quality. It plans to move to introducing competition between service providers (after the start-up phase of 2004-2005) whenever the required expertise will allow it.

In Mali and Benin, the invitation to tender procedure implemented on the basis of World Bank recommendations, in fact turned out to be little adapted to the realities of these countries. The obligation of carrying out three invitations to tender before being able to proceed to single tendering led to excessively long response times. Added to these delays were those linked to the inadequacies of a large number of offers that did not comply with the rules laid out and to the gathering of necessary funds to cover the beneficiaries' contributions. In some cases, these delays were more than two years.

It was undoubtedly illusory to think that the existence of invitations to tender alone would suffice to create a training market. The potential demand in Sub-Saharan African countries is largely insufficient to allow the creation of a sufficient number of bodies and to allow for at least three responses in all cases. Furthermore, the exclusion of public establishments (as requested initially by the World Bank) under the pretext that they distort competition, made supply even rarer, especially in the branches that require a minimum amount of equipment. Where the World Bank intervened (Benin, Mali) it had to reconsider its ostracism concerning public establishments.

For training applications presented by craftsmen's associations, Swisscontact established the principle of a simplified procedure based on an agreement between the fund and the National Federation of Craftsmen. This procedure allows for derogations from the principle of invitations to tender and to directly select the service provider. In addition, Swisscontact makes advance payment of the beneficiaries' contribution, which it recovers later from them or from their organisations. The time period for processing applications and for carrying out training has therefore been reduced to approximately four months. This procedure is close to the operating reality of the FAFPA in Burkina Faso, which uses both mutually agreed contracts and the intervention of French Cooperation to advance or to reduce the compulsory contribution of craftsmen and micro-enterprises in the informal sector.

Finally, in Mali the FAFPA implemented a different procedure for the modern sector. This consists of pre-selecting seven centres through an invitation to tender, for a certain number of standard training modules defined by the FAFPA. The business that makes an application chooses its service provider among these seven authorised centres. The FAFPA sets itself a scale for bearing the costs of the different training courses and looks after a variable part in relation to the cost presented and the costs eligible for payment by the fund. The percentage of costs borne by the FAFPA can therefore vary from 20% to 75% of the total cost.

The programmes that are deemed eligible are processed by training advisors, who can be external to the training body as they are in Benin. This solution allows an increase in skills but lengthens the time periods insofar as the examination by advisors overlaps that carried out by fund's advisors (even if it enhances it). It also allows a reduction in the number of permanent advisors and therefore also in fixed costs borne by the structure. Conversely, it presents certain risks in relation to transparency if the advisor himself is likely to intervene as a trainer or service provider to draft the training application.

The FAFPA in Mali such as the FODEFCA in Benin have carried out reflection to review the entire procedure in such a way as to simplify and reduce the response times. In order for it to be constructive, it should better take into account the problems linked to the exiguity of the training market. Finally, in several cases where there is one service provider, a parameterisation of costs and an assessment of training are necessary to guarantee the quality of training actions and minimal transparency regarding procedure.

3.5.2. Highly regulated procedures in Tunisia

The fund allocation mechanisms in Tunisia have the distinctiveness of being defined by law and regulations regarding both the conditions for granting the rebate as well as the methods for financing the National Continuous Training Programme or PRONAFOC and for financing personnel training linked to technological investments or Article 39.

The standardised conditions of rebate of the tax

Articles 1 and 2 of the 1993 decree setting the criteria and procedures for granting rebates of the vocational training tax define the conditions in which a business has the legal right to return payment of the tax.

"Art. 1 – Granting of rebates…is subjected to the prior approval of company training actions, by the competent services of the Ministry in charge of vocational training. Furthermore, businesses employing 200 people or more must have a training service or person in charge of training in order to receive the rebate. Approval applications must be supported by a written report indicating the opinion of the joint representative structure within the business on the planned training actions, except in the case where the creation of this structure is not required by the law in force."

"Art. 2 – Approval applications are presented in compliance with a model established by the competent services of the Ministry in charge of vocational training; they must specify in particular the nature and the conditions of the training actions as well as their provisional costs. The approval decision is sent to the business within a maximum of 30 days from the date of filing the application with the regional and regionally competent service of the Ministry in charge of vocational training. This decision must specify for each training action the estimated amount of corresponding rebate."

In this case, the single application procedure for the beneficiary business consists in fulfilling the eligibility criteria (internal organisation, formal opinion of the joint structure), filling in an approval document according to the defined requirements (the reimbursable actions and the minimum and maximum amounts are specified by the decree) and waiting for approval by the State services. This approval is given after a compliance assessment of the application and does not call on strategic steering of fund allocation in relation to the priority objectives followed at national, sectoral or regional level. As a result, it is the most organised and well-structured businesses in training management that benefit from the rebate: some 1,700 businesses out of 120,000 paying contributors and among these are the largest public enterprises in the country.

Differences between objectives and implementation procedures of the PRONAFOC

The distribution methods of the PRONAFOC funds are also defined by decree while at the same time introducing criteria of choice that are subjected to annual economic assessments:

- Funding is granted with a view to supporting "the efforts of private businesses in the area of improving their employees' skills and qualifications."
- It is granted as part of the National Continuous Training Programme established by the Ministry in charge of vocational training and "sectors and categories of business determined by decree by the Vocational Training Minister and this with regards to the evolution of the economy and upgrading the needs of businesses." This decree also determines the annual funding ceilings for each category of training eligible for the programme.

Given its definition, the PRONAFOC, contrary to the rebate, therefore constitutes a financial support instrument for the strategic evolution of the skills and qualifications of the Tunisian economy, in relation to the upgrading needs of businesses. The results of the survey, however, oblige us to strongly attenuate this statement. Thus, a significant part of the PRONAFOC funds benefit private businesses subjected to TFP on condition that they have used their rights to a rebate of the said tax. As a result, the national programme reinforces the unequal nature of the tax rebate and at the same time deprives small and medium-sized businesses of part of the means that were initially intended for them. The direct responsibility of the CNFCPP in the implementation of the programme allows it to make associations of micro and small businesses beneficiaries of the funds, but, according to the very opinion of social partners, this endorsement answers even more to an approach of spending rather than that of investing in the priority activity sectors.

It emerges from analysis of the distribution of the Tunisian funds that all the components exist so that this distribution could be redefined in relation to strategic approaches: a multi-annual quantified plan of performances expected from vocational training in relation to economic development, a MANFORME programme centred on the priority skills and qualifications of professional branches and businesses, a current overhaul of the training system according to skills-based and alternance-based training engineering. Nevertheless, the funds play alongside or sometimes against the reform, by favouring training supply to the detriment of demand or players have less need for financial support. Procedures in place and the real lack of players' involvement, especially social players, are partly responsible for this malfunction which is both political and strategic. There is a need for adequate reform of the financial instruments. It is planned in the 2005-2009 presidential programme and should allow funds to intervene as tools to facilitate and fulfil the MANFORME objectives, which include that of granting priority to a training response to the skills needs identified at company level.

3.5.3. South Africa, between set and discretionary allocations and strategic grants

South Africa has undoubtedly the most complex and complete application system of the five countries surveyed. It has three types of resource allocation that are modulated in relation to the objectives defined and the public targeted.

The NSF strategic grants

The National Skills Fund was explicitly created to finance national objectives such as job creation, the development of small businesses and specific aid for target populations such as women, young people, the rural population and the handicapped.

The 0.2% of the levy collected is distributed according to specific "funding windows." The three main types of grant concern the following:

- the social development or the training of particularly disadvantaged populations,
- the training of workers to strategic qualifications and jobs, particularly for SMBs and for low-skilled workers,
- alternance training or learnerships for job seekers in order to integrate them successfully into the work market.

The grants are mainly distributed to the provinces as part of their territorial development plan and to the SETAs after presentation and assessment of the relevance of their strategic training projects. The distribution methods comply with a mix of political objectives (black empowerment), strategic objectives (reaching quantitative objectives set by the 5-year plan) and qualitative assessment criteria of the projects presented.

The SETAs' discretionary funds

Within the 0.8% of the levy allocated to authorities or sectoral funds, 0.2% (0.1% up until 2005) is reallocated according to the priorities determined by the management board of each fund. This freedom to allocate the amounts collected allows SETAs to finance businesses beyond the planned reimbursement quota of the levy and in the areas of skills and qualifications that are essential both to the economic and the human resources development of the sector. At the same time it allows sectoral funds to finance apprenticeships, to participate in projects of national interest (basic adult training, learnerships for job seekers, etc.) with the possibility of requesting complementary finance from the NSF and implementing innovation and research actions both at sectoral and intersectoral levels.

It is obvious that for the SETAs the discretionary resource allocation process is a tool for demand-based strategic steering that effectively engages the collective responsibility of the co-deciders who are the sectoral social partners and the management of each fund.

The SETAs' set funds

Following the example of Tunisia this part of sectoral funds (0.5% of the levy) is distributed according to highly defined and standardised conditions, under the form of a rebate to businesses that have paid the levy. Up until 2005, the presentation of the training plan led to an initial payment of 0.15% and the report on the actions carried out led to the rest of the payment. From 2006 onwards, there is one single payment based on one single document including the training plan for the coming year and the activity report of the previous year. The allocation criteria are those concerning actions carried out in relation to the training plan presented. This plan must implement a qualifying training mechanism in a workplace situation (Workplace Skills Plan) and define the training courses to be carried out and the skills to be acquired during the year. It must name the beneficiary employees classified according to race, sex, and level of handicap in order to correspond to the criteria of priority publics defined by the National Skills Development Strategy. Finally, it is desirable that it is carried out, if possible, according to the principles of quality assurance defined by the South African Qualifications Authority (SAQA).

Compared to the situation in other countries surveyed, the methods for requesting and allocating resources in South Africa present some similarities and some major differences. Just as in Tunisia, they implement a tax rebate procedure paid to contributory businesses. But they differ from this country through the compulsory structuring of a training plan based on the concept of qualifying training in a workplace situation and through the freedom given to the sectoral funds to devote part of the rebate to projects with a high strategic value for the sector or the business. They also differ in the fact that the SETAs redistribute the funds collected to a maximum of contributory businesses (80% of large businesses and 60% of SMBs according to the objectives of the five-year plan 2005-2010).

Compared to the situation in Sub-Saharan African countries, the methods for requesting and allocating funds in South Africa, just like those in Benin, Burkina Faso and Mali, are in keeping with a national approach that includes the qualification of the informal sector (especially at provincial and town level) and the training of economic players who are little or not at all qualified. They also implement dual-type training in the form of learnerships that little by little structure the entire training mechanism. They greatly differ however, insofar as there exists a modern sector representing at least 50% of the economic fabric and that through the organisation of sectoral centres of expertise and structured training and qualification mechanisms plays a role of regulation and organisation of the training market that the invitation to tender system is supposed to achieve in the Sub-Saharan African countries.

3.6. The need for expertise and/or an adequate approach to move away from a training supply approach

Funds for financing vocational training are more or less based on the idea that it is both necessary and possible to encourage a demand-based training approach as opposed to a supply-based one that technical and vocational education and training establishments constitute. Such an option is deemed necessary to create training courses adapted to the needs of economic players; it is deemed possible once the mechanisms that encourage the emergence and development of a competitive training market exist.

3.6.1. From a supply-based to a demand-based approach

The idea of vocational training adapted to players' needs is hardly disputed. It is even the first objective of all vocational training, be it basic or continuing. Granted, in basic training this objective is more or less taken into consideration depending on the level of involvement of professionals in the drawing up of frames of reference. But it must resonate with the academic considerations which are of progression in the acquisition of knowledge and increasing knowledge deemed necessary for learning a trade, but also for subsequent professional evolution. Basic vocational training thus takes the form of programmes whose teaching is rewarded by receipt of a diploma. Supply is hence standardised and when the programmes are being drafted it incorporates, at best, the general needs of professionals and not their particular needs.

Continuing vocational training is meant to be more “professional” in the sense that it is supposed to either improve a skill through better command of the trade or training in using higher performance tools, or fulfilling a very specific need linked for example to the context of a business that needs to introduce someone with professional knowledge that is already acquired. The idea that in this case the demand must prevail does not, however, totally exclude a certain standardisation of the response. The same goes when learning a foreign language or training to use a new piece of software. Further training offers a large framework to allow training bodies to propose pre-formatted training courses intended to respond to this type of demand. The request would be better satisfied if a large number of training bodies and therefore a large number of catalogues were available for the requestor to exercise his choice. The existence of a competitive training market then appears as a condition for moving from a supply-based approach to a demand-based one.

In other cases, such 'catalogue-based' training courses are not compatible with the distinctive nature of demand and this requires the drafting of a specific response. In this case, the solution no longer lies in the large or not so large number of training bodies likely to take part in the market. There can only be a specific response if there is sufficiently competent expertise to analyse demand and to convert it into a formalisation and technical know-how acquisition process. This is the very objective of training engineering. The assertion of a demand-based approach then closely depends on the existence or not of a market separate to that of training bodies: an expertise market. In the countries surveyed in Sub-Saharan Africa, one can say that beyond their differences, the assertion of a demand-based approach comes up against the lack of an expertise market.

3.6.2. An offering lacking in expertise in Sub-Saharan Africa

In practice, the actions carried out in the three countries surveyed have focused rather on the ‘catalogue’ dimension of the market than on its ‘expertise’ dimension. Due to a lack of data, the surveys have not allowed for appraisal of the extent in which procedures implemented to promote the vocational training market have led to the arrival of new training bodies. Only qualitative responses have been given without it being possible to know the exact nature of the new arrivals – simple consultants or centres with permanent instructors. The sectors concerned are mainly services: management and entrepreneurship training, office tool training, accounting, etc. which lend themselves easily to the creation of modules presented on a catalogue. In the same way, when the FAFPA of Mali pre-selects centres for the creation of certain training modules, it contributes, albeit involuntarily, to promoting a catalogue-based offering.

Conversely, the failure of invitations to tender in several technical/industrial training courses shows that the procedure has not spontaneously generated new training bodies and therefore allowed a market to emerge. In this scenario, the only possible response lies in the ability to make the existing establishments move from their own approach of programmes leading to diplomas to a training engineering approach. In both Mali and Benin, French Cooperation contributed to this type of solution. In Mali, it supported the creation of three Training and Enterprise Support Units (UFAEs) in the fields of industry and mining, maintenance, construction, management and organisation. Their mission is to develop advice/audit/expertise activities in parallel with their continuing education actions. In Benin, it trained advisors and training engineers and helped them to become organised as part of a network. Centres of expertise could therefore be created even though they do not yet represent an “expertise market.”

In Burkina Faso, French Cooperation through the FPMA project (Support Project for Vocational Training and Craftsmen’s Professions) helped the OPEL (Professional Organisation for the Electricity Sector) in renewing training frames of reference for electrical engineering and helped the training centres concerned to upgrade their equipment, to train their instructors and in conjunction with Swiss and Austrian Cooperation to initiate a dual-type training experiment for young people.

3.6.3. A structured offering concerning professional branches in South Africa and Tunisia

The more advanced situation in the two countries both from a level of economic development and of structuring of the training offering does not prevent them from having difficulty in moving from the supply-based training approach.

Hence, in South Africa, analysis of the results of the first National Skills Development Plan (NSDP) 2001-2005 indicates the poor performance of a certain number of SETAs in implementing training offerings adapted to the needs of the sector's businesses. In the same way, analysis of the training courses set up by Tunisian businesses within the framework of granting of TFP rebates clearly highlights the trend among large businesses in multiplying their 'catalogue' training courses. This maintains the existing offering despite the requirements formulated by decree to ensure this offering is in keeping with the identification of training needs within businesses.

The specific nature of the situations in both countries comes from the structural reform that each one of them carried out regarding training supply.

In this way, Tunisia, through its vocational training rehabilitation programme (MANFORME), carried out a veritable cultural revolution of its training approach by focusing the entire basic and continuing vocational training mechanism on the responses to be given to the skills needs of the economic players that are businesses and professional branches. A revolution that one Tunisian reform expert explains as follows: "A revolution in the approach (partnership with professional federations, involvement of businesses at every level, etc.), a revolution in the engineering to be implemented (professional standards preceding and on which training standards are based, definition of business/client needs, vocational training programmes drafted according to a skills-based approach in conjunction with professionals and on the basis of professional know-how, redefinition of engineering in training centres, etc.[5]" The CENAFFIF, National Centre for the Training of Trainers and for the Development of Training, has thus to date restructured 170 programmes of skills-based training in relation to the employment frames of reference that it has established and defined with professional branches and social partners.

South Africa took the same initiative by implementing the "Skills Development Act" of 1998 and by basing eligibility for training finance on the real recognition at sectoral level and by the sectoral funds, of employers' and employees' needs regarding skills. The training plan that businesses must present in order to benefit from the 0.5% rebate of the levy must therefore include a skills-based training approach in a workplace situation. In the same way, the SETAs are invited to draft a sectoral development plan in which they must determine the training offering in relation to the identification of skills needs that are high priority or lacking from the sector. All the actions to integrate job seekers into the workplace include alternance training that targets the skills to be acquired by the trainee, based on the idea of having an apprenticeship in a professional situation. All of these measures do not mean that the supply-based approach is definitively outstripped by that of responding to the skills and qualifications needs of businesses relayed by the sectors. It simply means that the training system in South Africa, moreover known as the Skills Development System, does its utmost to ensure that this is part of a structured approach to take economic and social demand into consideration.

Tunisia, just like South Africa, has not left the task of restructuring supply up to the market. Both countries have incorporated this restructuring into their political will to reform the market. South Africa has the edge on Tunisia by having carried out total compliance of the training finance tools with its "development through skills" approach.

[5] Hichem Ben Chaabane, "Approche par compétence dans le dispositif de formation professionnelle (Skills-based approach in the vocational training mechanism), PMU, MANFORME, 1999.

3.7. The divergent effects of international cooperation on the creation and implementation of the funds

Without having always instigated the creation of Sub-Saharan African funds, the technical and financial partners that are the World Bank, French Cooperation, GTZ and Swisscontact, have played a major role everywhere in their structuring and in the launch of their activities.

But the objectives and the methods used by the technical and financial partners in reality have been and still are, of a very different nature. The World Bank provides finance and procedures, French Cooperation provides the know-how of its technical assistance and the training actions that it implements, Swisscontact provides its experience in supporting the organisation of craftsmen and the modernisation of apprenticeship training, and finally, GTZ provides its dual-type apprenticeship model that it has in common with Swisscontact, and its conviction that the actions undertaken will only be long-lasting if we move from experimenting to building a policy with its institutional and legal framework and its appropriate tools. At first sight, one can see in these different objectives a de facto complementarity. In practice, this is not the case and they can even encourage approaches that turn out to be divergent.

3.7.1. The multiple influences of fund providers in Benin and Mali

The different technical and financial partners were all present in the field of vocational training in Benin without being active in the same sectors. Thus, the World Bank focused its action on the FODEFCA, which it financed from 2001 to 2005. It set procedures and objectives for the development fund but did not try to develop a particular concept of training. GTZ on the other hand, focused its action on supporting the implementation of a dual-type apprenticeship policy with very precise objectives in the field of apprenticeship design: training master craftsmen prior to the training of their apprentices, associating craftsmen and teachers in the theoretical part of the training, having the course and the certifications recognised by the Ministry. It thus supported the Ministry of Technical and Vocational Education and Training. Swisscontact had the same position as GTZ in the field of apprenticeship design, but in its intervention it targeted craftsmen without worrying about the existence or not of an overall training policy.

Only French Cooperation participated in these different approaches by positioning itself as a complement to the World Bank project within the FODEFCA and to the support given by GTZ to the implementation of an apprenticeship and vocational training policy as well as the support given by Swisscontact to craftsmen. It did not, however, play a unifying role in the sense that it would have steered all partners into using a common approach. On the contrary, its action was torn between the approach encouraged by the World Bank on the one hand, and that upheld by GTZ and secondarily by Swisscontact on the other.

Assuming French Cooperation had wanted to, would it have been able to play a unifying role? The answer is undoubtedly negative. Indeed, neither the World Bank, nor French Cooperation, nor the EU, who supported the training fund in Niger, conceived their financial support as support for a policy that would be defined by the managing body of the fund itself. As technical and financial partners, they always gave conditional support by specifying especially the categories of beneficiary to be aided, or even the provisional number of beneficiaries and the sums of money to be paid. As a result the fund had to account for its action not only to its supervising Ministry, but first and foremost to the fund providers without whom it would not have been able to operate. Reporting to each fund provider on how it uses it means cannot constitute a strategic and coherent intervention strategy in the field of vocational training.

Such an approach was the exact opposite of that which French Cooperation implemented with GTZ in its support to the Beninese Ministry of Technical and Vocational Education and Training. In fact it concerned supporting the drafting of an apprenticeship policy by creating its legal framework and its tools, especially the methodology of training frames of reference and certifications. Here the cooperation was in keeping with a strictly national approach and not with that defined by Washington or Brussels.

It is not surprising that the support granted by the World Bank to the FAFPA in Mali was dominated by a financial approach. One could argue that this did not prevent the development of dual-type apprenticeship under the impetus of Swisscontact. But to date this is simply the transposition of the demand of craftsmen and their associations, and has not taken the form of a national policy as in Benin, in other terms a compulsory stepping-stone in apprenticeship training. In the first case, the FAFPA management board is free to follow up or not on dual-type apprenticeship as with any other training application. In the second case, there is the presence of a national mechanism called on to offer an institutional response to the issue of the nature of the second stage of basic education: general or vocational.

3.7.2. More unified cooperation approaches in the other countries

Even though Burkina Faso is a stakeholder in Sub-Saharan Africa, it has not received any support from the World Bank. As a result, the FAFPA was launched within the framework of a coordinated cooperation between France, Germany, Switzerland and Austria, itself part of a Vocational Training Support Unit or CAFP, where the supervisory Ministries (Ministry of Labour, Employment and Youth, the Ministry of Commerce, Enterprise Promotion and Handicrafts, the Ministry of Secondary and Higher Education and Scientific Research) are stakeholders in the steering committee. Therefore, from the outset external technical assistance has been part of the national framework of the vocational training policy. The CAFP today is still the core gathering place for financial support from fund providers, their support for improving FAFPA expertise and their support in drafting, validating and distributing frames of reference for apprenticeship training for the handicraft professions.

Tunisia designed and implemented its vocational training reform policy with the combined help of the EU, the World Bank, GTZ and the French Development Agency (AFD). All this assistance was strictly steered by the Ministry in charge of vocational training and in particular by the Ministry of State responsible for vocational training. This resulted in an overall agreement by fund providers on the skills-based approach in the vocational training mechanism, on the creation of sectoral training centres and on the redefinition of training frames of reference based on employment frames of reference. The AFD provided an essential contribution, in conjunction with the World Bank in the area of implementing partnership management. The distinctive characteristic of the Tunisian situation comes from the fact that fund providers did not intervene in the area of financial instrumentation even though the Secretariat of State recently asked the AFD to help it to structure its reflection on the new tools for allocating funds' resources provided for in the presidential programme.

South Africa structured its entire skills development and finance system with the financial help of the EU and the technical assistance of GTZ who supported the Ministry of Labour in designing the overall institutional architecture for the skills development system: national qualifications and quality assurance system, national and sectoral structuring of financial instrumentation, implementation of an alternance training approach both at basic training level and continuing education level, methodology for the accreditation of expertise acquired with experience, training engineering in the informal sector, etc.

It is important, however, to highlight the fact that this technical assistance has increased instead of minimising the role of national political power and the consultation bodies that are the NSA and the sectoral management boards. The institutional structuring of the funds into the NSF and SETAs is furthermore the result of an important international study led by South African experts on the finance systems in African, Asian, South American and European countries and as a result is part of a joint political decision by political, economic and social players of the country.

3.8. Conclusion

The analysis criteria chosen regarding the different operating characteristics of the funds are not exhaustive, far from it. We could add the analysis of the funds' internal management and operating structures and the relationships that exist between these structures and the performances announced in terms of reaching set objectives and targeted results. We could also better refine the convergences or divergences that appear in the countries, between the strategic approaches of the reforms implemented and the financial instrumentation supposed to support them and if possible reinforce them. Finally, we could analyse the different methods for funds' beneficiaries to access finance depending on whether or not the training courses pertain to a recognised qualifications system.

Nonetheless, the criteria that have just been analysed appear to be the most important from a comparative point of view.

The typological analysis will try to take into account all the analysis criteria available so as to better highlight the convergences and divergences between the five funds surveyed and therefore open the way to a possible modelisation of the institutional and operational approaches that characterise them.

4. Towards a differentiated typology of the funds surveyed

A cross-spanning analysis of the five funds surveyed has allowed for their convergent and divergent characteristics to be revealed. It has above all highlighted the real operation of each fund and the homogenous or differential reading carried out by policy-makers who were met during missions in the countries.

The objective of the typological reading of the funds is to review all the observations made and the approaches highlighted to compare them to the initial assumptions and especially, to those relating to the optimal running of a fund. It is not in this case a question of carrying out a simple exercise in the theoretical structuring of the survey results, in order to enter them into a conceptual model design that is attractive to look at but useless in practice. On the contrary, it concerns making a critical assessment of the conclusions drawn from the documentary study of the thirteen African funds (Francophone, Anglophone and Lusophone[6]) and defining one or several functional diagrams based on the field survey, that are likely to determine the conditions for maximum efficiency of the training funds in relation to the strategic and operational objectives that were set for them. These diagrams will allow each fund to question its own structuring and efficiency in relation to the modelised experience of the other countries. They will give those in charge of State aid who are desirous to help or guide the implementation and/or development of the training funds, elements to assess the conditions and methods of an aid that is both timely and effective.

4.1. The initial functional diagram

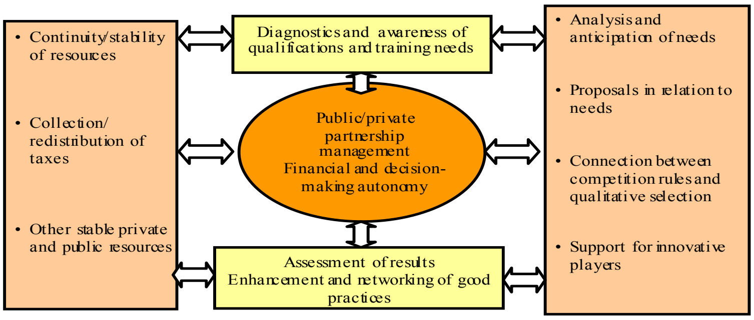
As presented in the introduction, the field survey in the five African countries was carried out on the basis of assumptions of optimal fund operation identified during the MAE documentary study on the impact and the financing of thirteen African funds. These assumptions were summarised in a functional diagram (under the concept of an ideal type of fund), that explained the elements which appeared to structure the identity, organisation and action of an efficient fund.

This diagram highlighted more particularly a model based on which a fund had the the maximum chance of reaching the objectives and results assigned to it. From this model the following efficiency requirements mainly emerged:

- identifying needs and giving an appropriate response,
- carrying out private/public partnership management
- ensuring continuity and stability of resources,
- combining the rules of competition and the choice of the most qualitative selection,
- enhancing the experience of each fund by comparing it to the good practices of other funds.

The country surveys confirmed the legitimacy of most of the requirements on the initial functional diagram. But they also brought to light the fact that several conditions were not met in order to satisfy these requirements. They thus led to a modification of the initial assumptions based on an updated typological reading that is more pragmatic concerning the reality of the funds.

[6] MAE, Op. cit.



The functional diagram of the ideal type of Sub-Saharan training fund, MAE, 2005

4.2 New data from the field survey

The interest of the initial functional diagram was to represent a coherent model of fund in relation to which it was possible to clearly position the responses of the people surveyed. Analysis of similarities in or differences between these responses in relation to this model in fact allow us to identify the major issues of the different training funds and to highlight both the convergences and the divergences. It especially allows us to structure these issues in relation to a more systemic reading of each country's experience.

4.2.1. The structuring effect of all the funds on the development of apprenticeship or alternance training

The surveys carried out in Sub-Saharan Africa and in Tunisia have brought to light the importance of the funds in financing renewed apprenticeships and alternance training for young people. The creation of the funds in fact aimed to remedy the failings of technical education and to favour the emergence of demand-driven training.

In Sub-Saharan Africa, the growing importance of dual-type apprenticeships is a result of support from different Cooperations - German, Swiss and French - to craftsmen's organisations for the drafting of training curricula based on improving the professional practices of the different trades. Standardised training courses for young people and master-craftsmen instructors could thus be set up. In addition, fund providers intervened to bear all or some of the cost of apprenticeship training.

However, further training of craftsmen themselves with a view to responding to specific demands turned out to be more complex and sometimes more costly to implement, because it was for smaller groups. Furthermore, access to these training courses was often limited by the contribution that beneficiaries had to pay despite the fact that Swisscontact provided advance payment. An imbalance was therefore created between basic training and continuing education to the benefit of the former.

Despite the implementation of a national apprenticeship policy in Benin, looked after by the Ministry of Technical and Vocational Education and Training, the FODEFCA gives the same priority to (basic) apprenticeship training in relation to (continuing) further training of craftsmen as the FAFPAs in Mali and Burkina Faso who are the only source of finance for apprenticeships.

In Tunisia, where alternance training is dominant, it is supported as part of the rebate on vocational training tax (TFP). There is however, apprenticeship training for young people aged 15 or over, given in sectoral training centres indirectly financed by the TFP as part of its participation in the operating costs of vocational training centres.

The situation is slightly different in South Africa where training is given in priority to employees in businesses and to the unemployed during their phase of integration. Training in a workplace situation is a necessary condition for the training courses to be eligible as part of the SETAs. Nonetheless, this principle of alternance is tending to enter the basic vocational training and third-level education system.

These developments, which were hoped for without however the consequences having been measured, deserve special attention as regards the funds' finance capacities. Once the vocational training has a usefulness that can be measured both by businesses (or craftsmen) and by employees (or apprentices), it is logical that the latter would contribute to financing them. However, the place taken up by finance, which is more or less destined for apprenticeship and alternance training for young people, is more and more in contradiction with the finance needs of continuing education. Furthermore, it comes up against the funds' finance capacities, especially in Sub-Saharan Africa, where the salaries tax base which is used to justify contributions or repayment by the State is particularly small. Such a situation is tending to make modern sector businesses bear the majority of finance for apprenticeship training, and could in the long term threaten the very principle of cost sharing extended to the informal sector. This risk is even higher when the funds' fields of competence are extensive and they must ensure, especially, the financing of training in the agricultural sector which concentrates the majority of jobs in these countries.

4.2.2. The necessary redefinition of collection and allocation methods

The field survey brings a paradox to light; whereas the training needs are largely unsatisfied, the resources collected are only partially spent. There are several reasons for this situation: the funds have not yet really reached their cruising speed (Burkina Faso), or they have been incapacitated by the complexity and slowness of procedures implemented by the World Bank as in Mali and Benin. They are also the result of insufficient expertise and the difficulties encountered in responding to a certain number of demands.

The survey also led to a second observation: in the Sub-Saharan African countries, income from the vocational training tax is either not entirely paid to the funds, or it is replaced by a budgetary contribution that is smaller than the expected amount, whereas in Tunisia, approximately half of the amounts collected is paid into the running of basic training establishments and in South Africa, one fifth of these amounts is used to finance social integration and basic training for adults who are illiterate or almost.

In addition, access by informal economy players to the funds is often hindered by their difficulty in paying the contribution required of them. In the same way, in both Tunisia and South Africa, SMBs do not have the human means to access the tax rebate, as the human and administrative investment necessary for this is beyond their scope.

It emerges from analysis of these situations that there is no point in increasing the taxes or budgetary contributions if certain issues are not resolved beforehand: the problems of access to finance for pre-determined priority beneficiaries, the organisation of a training market based on expertise required by economic players requesting specific skills and qualifications, and finally, the redirection of funds collected for training to their initial destination.

The watchword for all the funds is not necessarily to find more resources, but to better spend the resources available by facilitating access to finance for those who are too easily excluded. The watchword for public authorities is undoubtedly to ensure that the money collected for training is actually used for training and that if possible it is made directly available to the funds that have the mission and the adequate means to redistribute it.

4.2.3. An organised market versus a competitive market

The survey highlighted the fact that the methods for distributing and allocating finance available from the funds were a major issue both from donor level and from beneficiary level. A comparative analysis of the countries' practices has revealed three main outlines of apportionment among these distribution and allocation methods based on the way in which the funds enhance their resorting to the vocational training market.

The limits of resorting to the market in Sub-Saharan Africa

In Sub-Saharan Africa, under the impetus of the World Bank and French Cooperation, the funds were created with the proclaimed objective of encouraging the emergence of a competitive and transparent training market. This market was supposed to break the rigidity of the supply of public and private technical education establishments and respond to the demands of professionals. Invitation to tender procedures and the exclusion of public establishments were the instruments favoured.

Reality turned out to be obstinate regarding this approach. Demand turned out to be too weak and insufficiently solvent to be predictable and to allow training bodies to invest in instructors and equipment to create a training market. The market stimulated a concentration of rare investments in the training segments that do not need specific equipment or permanent instructors; mainly management and computing. Elsewhere, the failure of invitations to tender demonstrated fully the impossibility of seeing a market emerge just from procedures intended to create it, and even more so the illusory nature of excluding public establishments, which had to be reintroduced to the stakes.

It would however be wrong to attribute this failure uniquely to the complexity of procedures implemented by the World Bank. As long as there is no solvent demand of sufficient volume to justify the presence of several operators and offer prospects justifying risk-taking, and therefore investment, there will not be a market. It cannot be decreed by imposing procedures, albeit simplified ones. It will only grow as solvent training demand grows. We are not there yet.

Mutually ageed contracts in Tunisia – supervised before and checked after

If by “market” we mean resorting to private service providers, this is happening in Tunisia. But instead of establishing a totally open competitive procedure, it has chosen to supervise by decree the rate-setting of training actions within a range of minimum and maximum amounts and thus encourage mutually agreed contracts between beneficiary businesses and training providers. The business is obliged afterwards to defend a didactic and financial report stating especially each training action, the didactic conditions and means implemented, the number of beneficiaries, the training body, the real cost paid as well as the amount of vocational training tax due for the previous year.

The business/service provider relationship is the same for the PRONAFOC and thus shows that in Tunisia the invitation to tender system has been replaced by a standardised supervision of rates and a posteriori checking of actions carried out which include that of the contracting body. It remains that the business is free to choose the training action it implements on condition that it shows that it has carried out analysis of its training needs and that it enters this action in a structured training plan.

The predominance of a regulated supply and quality system in South Africa

The approach used in South Africa is not fundamentally different to that used in Tunisia. However it does have two specific characteristics.

The first one consists in placing conformity to a training mechanism known as “learnerships” at the centre of the rules for accessing training finance. This mechanism is regulated in two ways: on the one hand, it obligatorily consists of a theoretical and practical training part that must be implemented according to the regulatory provisions and the directives enacted by the Department of Labour and the South African Qualifications Authority (SAQA). On the other hand, it requires a registration application with the competent administrative authority of the Ministry of Labour, prior to training.

The second characteristic lies in the coordinated qualifications and quality system implemented by the SAQA. A training provider cannot be selected by a SETA if he has not made a prior application for accreditation involving the implementation of an information and assessment system that is compatible with that of the SETA, and the implementation or at least the development of a quality management system.

Overall, the survey highlighted the fact that structuring of the demand takes precedent over procedures and one should not confuse resorting to private operators with the organisation of a competitive market. The funds have been brought to adapt their resorting to service providers in relation to the existence or not of appropriate expertise in demands (Sub-Saharan Africa) or they pre-define the market access conditions even if it means favouring the continuity of what already exists (Tunisia) or finally, by making promoter/service provider agreements part of a very organised culture of response to demand (South Africa).

4.2.4. A claim for tripartism and social dialogue as opposed to a ‘user’ approach

One of the great surprises of the survey was to observe that in the five countries, tripartism, which although it is displayed as being an integral value of the funds' creation, gave rise to varied interpretations. Benin represents the most complete form of social representation insofar as the FODEFCA’s management board comprises in particular employers’ and workers’ representatives and is presided over by public authorities and social partners successively. In Burkina Faso and in Mali, tripartism refers to a role of State coordination of sectors of activity or users, represented both by employers’ organisations and by commercial organisations. In South Africa it combines a strong representation of users and a well-affirmed role of public authorities. Until recently in Tunisia, the State has had a privileged partnership with employers, but trade unions are gaining ground as an incontrovertible partner.

This observation of the weakness of tripartism must however be toned down by that of the existence of a momentum of social dialogue in all the countries. In this way, South African employers are militating for a replacement of the huge representation of users or “stakeholders” by that of social partners, while at the same time arguing in favour of an improvement in the level of expertise of the workforce. The Tunisian General Labour Union is preparing its active entry into all the areas of tripartite consultation and for this is training its representatives so that they can take their full responsibility in the ongoing debates and especially in those concerning the financing of training. Burkina Faso has also launched a bipartite working group on vocational training and is awaiting the conclusion of a consultation agreement between employers and trade unions on the development of human resources in businesses. The National Employers' Council and the trade union organisations in Benin have signed an agreement with a view to promoting vocational training. The Bamako Declaration, being signed at the time of the survey, finally affirms that the Malian social partners are ready to “join their efforts to give momentum to vocational training, create a new social dialogue, encourage a certification of skills acquired in vocational training and make vocational training systematic as part of access to employment.”

Enhancement of this social momentum, which transcends the differences in the economic situation and in the culture of vocational training between the five countries surveyed, leads to the confirmation that partnership management of the funds, which was claimed as regards principles (see the initial functional diagram) and undermined both by the the public authorities’ unilateral control of the decision-making process, and the weakening of employers’ and trade unions’ representativity in the name of a user approach, has not lost its legitimacy.

4.2.5. A general demand for expertise with a view to structuring demand

The demand for expertise, just like the demand for stepped-up social dialogue, is another permanent feature of the five funds surveyed. But it is expressed differently according to the situation of the funds in relation to the training market.

The Sub-Saharan African countries are confronted with a two requirements: that of having assessors, within the framework of the application procedure, who are sufficiently informed of the real demand for skills among economic players in order to assess the relevance of the demands presented at their fair value. That also, of having advisors who are close enough to the professional realities of the formal and informal sectors to help requestors of training courses to correctly structure and explain their demand. There is a tendency to confuse the two types of expertise in assessment/selection and in help for preparing demands and in wanting the same people to carry out the two tasks. The fact that the Observatories for Employment and Training are joined to the ANPE (National Employment Agency) and the funds’ lack of resources have deprived the funds of an expertise tool that was designed originally as a complement to their activity.

In Burkina Faso, the two FAFPA training advisors are supposed to carry out the dual expertise mission, but the professional federations, in conjunction with French Cooperation, want assistance to be as close as possible to the technical and professional requirements of their trades. To assess demands, the FODEFCA in Benin calls on external training advisors who are supposed to be more suitable for judging their relevance, but the length of the selection procedures makes them unavailable to study the training needs of craftsmen and businesses beforehand. In Mali, the FAFPA's internal training advisors currently carry out the tasks of assessment and follow-up of actions, but not those of structuring needs and helping to prepare demands. However, the three Training and Enterprise Support Units (UFAEs) created with the help of French Cooperation are virtually centres of expertise. Swiss Cooperation (through Swisscontact) and until recently French Cooperation have guided the professionalisation of craftsmen's organisations.

Requests for expertise in Tunisia are expressed at professional branch level. They take the form of a financial application to the PRONAFOC for Sectoral Training Support Units (UAF). In this way, the FEDELEC, the Electricity and Electronics Federation, has created an expertise unit whose mission is to help businesses in the sector to express their skills needs, to formulate their training demand and to organise cross-spanning training actions at sectoral level. The idea underlying the UAF concept is that only expertise in the evolution of trades and qualifications in the sector can usefully help it to create a structured policy of overall human resource management and to request, through its member businesses, financing that would place the entire professional branch in a competitive position.

South Africa has apparently resolved its expertise problems since it has set up an entire credit allocation structure from the definition of strategic objectives and eligible training mechanisms to their finance methods and their implementation conditions. Certain policy-makers, however, have strongly expressed the need that existed in calling on experts, if necessary from outside the country, who were likely to intervene in the field of alternance training engineering, training of instructors and training of professionals in charge of guiding in-house training. While the call for expertise does not concern structuring demand as in other countries, it appears to be just as important for the successful interventions of the NSF and the SETAs as almost all the funds allocated go to professionalisation in a workplace situation.

The convergence between the types of expertise requested by the different funds leads to two consequences of an operational nature. The first one concerns the status of this expertise. It would seem desirable that the funds externalise it as much as possible for the double reason of not adding to the already high personnel expenditure in most cases and of not institutionalising skills that need to stay as close as possible to the reality of businesses, sectors and professional organisations. The second one is related to the need for the funds to plan in their budgets and their finance procedures the means and rules of eligibility that make it possible to justifiably resort to external experts.

4.2.6. The ambiguities of technical assistance situated outside the national policy

The five funds surveyed have called on or are in contact with bilateral or multilateral technical assistance providers.

The omnipresence of financial and technical cooperation

The FODEFCA in Benin and the FAFPA in Mali both benefited from initial contributions from the World Bank, and received complementary support from French and Swiss Cooperations. The FAFPA in Burkina Faso received support from French and European Cooperations (Swiss, Austrian and German) and continues to be supported by the Vocational Training Support Unit (CAFP) which groups together all these technical assistance providers with the exception of GTZ which has left the country.

For the implementation of the NSF and the SETAs, the South Africa Ministry of Labour received financial support from the EU through a partnership of European bodies led by GTZ. In conjunction with the Ministry, GTZ continues to look after the contracting and project management of the institutional architecture for skills development for which the national and sectoral training funds are one of the cornerstones.

While the rebate of the vocational training tax in Tunisia was implemented well before the great reform of the 1990s, the redefinition in 1993 of the conditions for granting this rebate, the establishment of the PRONAFOC the same year and its total overhaul in 2001 benefited from the overall technical assistance that supported the launch and then the development of the MANFORME programme: the EU, World Bank, German Cooperation (GTZ) and French help through AFD intervention.

The omnipresence of technical assistance in the five countries should be highlighted as something remarkable: all the funds or financial instruments in place have de facto benefited from external help, most of the time it was financial and technical. As a result, assessing them is also like assessing the objectives, relevance and effectiveness of international assistance to a certain extent. In this assessment exercise, two main distinctions related to the nature of this assistance are necessary.

Integrated cooperation in the more developed countries

The field survey has clearly brought to light the fact that international technical and financial assistance was almost invisible in the countries with both a well-affirmed modern economy and a highly-structured national policy of vocational training, i.e. Tunisia and South Africa. Encounters with the various policy-makers in both countries never led them to mention the identity of cooperators, the fields and methods of their intervention and the financial amounts committed to this effect. It was necessary to meet the technical assistance providers themselves to become aware of the importance of external help. The explanation of this situation does not lie in any concealment of this help but rather in the observation that cooperation is "nationalised" in the countries with the means to develop their own economic, social and educative strategy and it is placed at the service of creating national development strategies. The total integration of German Cooperation in the missions and services of the South African Department of Labour is the best proof of this. Other proof is the support given by various fund providers to consolidation of the MANFORME programme, which is entirely determined and steered by Tunisian education and training policy-makers.

Conditional cooperation in Sub-Saharan Africa

External assistance does not come in the same form in Sub-Saharan African countries. Without going so far as to say, just as some African policy-makers would, that “he who pays dictates the solutions,” the field survey led to the observation that the various interventions of the World Bank and European technical assistance often result in the implementation of procedures and objectives for beneficiaries that are not necessarily convergent or part of a national policy. This support was more significant in Benin and Mali than in Burkina Faso where the FAFPA was launched without the help of the World Bank. It did however benefit from a support unit bringing together French, Swiss and Austrian Cooperations for the same reason.

Thus, the aforementioned procedure of invitation to tender defined by the World Bank turned out to be inadequate for the needs of Sub-Saharan countries and led to delays of sometimes up to two years, between the application for finance and its acceptance. The simultaneous intervention of multilateral and bilateral fund providers often led to divergences in points of view and in actions in the countries: the World Bank set objectives to be reached without developing a particular training concept, Swiss Cooperation developed dual-type training in the handicraft sector without necessarily worrying about the existence or not of an overall structured policy and French Cooperation tried to be the unifying factor between all these forms of assistance without however managing to get partners to use a common approach.

Furthermore, in the case of Benin, the absence of a representative as such from the World Bank within the partnership framework encouraged by GTZ, French Cooperation and Swisscontact, weakened the link between the apprenticeship training policy developed by the Ministry of Technical and Vocational Education and Training and the training activities of the FODEFCA.

Finally, when the technical and financial partners themselves determine the categories and objectives of beneficiaries and the nature of the actions and the finance that the funds need to implement with their resources, the funds do not only have to account for their action to their supervisory Ministry, but first and foremost to the fund providers without whom they could not function. They are thus torn between justifying the use of their funds to the different fund providers and justifying their overall action to their supervisory authorities. Ultimately, while such a situation could create a set of interventions and activities, it does not encourage a strategy to the service of a coherent national policy on vocational training.

Conclusion

The objective of the field survey's illustration of the differences between the reality of the funds and the initial functional diagram, is not to give a value judgment on the validity or the legitimacy of the interventions by national and international players. Its objective, rather, by comparing the situations of the five funds studied through common analysis and assessment criteria, is to determine what prevents these funds or encourages them in carrying out the objectives and missions assigned to them as efficiently as possible. Characterisation of their different operating typologies through a model-based representation of this operation is in the same frame of mind. It is meant to make each fund better understand the optimal relevance of its current and future action.

4.3. Optimal operating typology of the funds surveyed

The intention of this typology is first of all to specify for each of the five funds the strategic and operational approach that it is needs to implement and that characterises it in an identity-based manner in relation to the other funds. This concerns stating the objectives that are actually targeted by the finance granted, whether these objectives were explicitly expressed by the political, economic and social policy-makers or implicitly included in the decisions made as the fund's operation progressed.

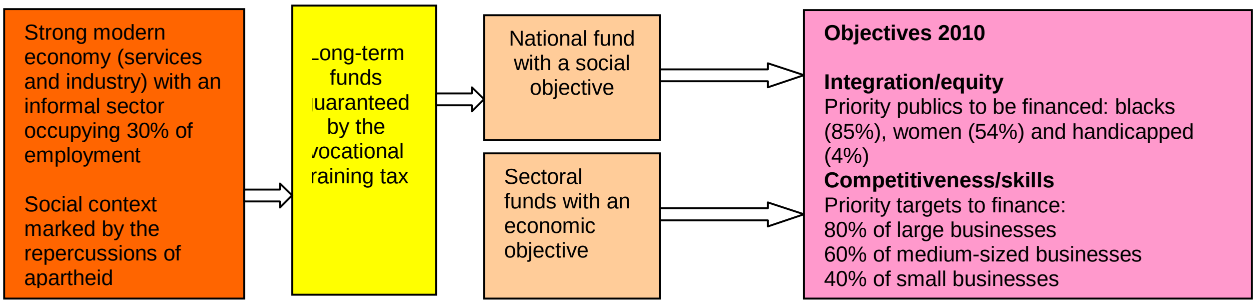
It then concerns reporting on the systemic evolution approach of each fund based on the description that the different policy-makers encountered gave of it. By taking the economic or social situations specific to each type of fund as a starting point, the possible and desirable changes will thus be underlined: better sustaining resources, better involving different players, making financial instruments even more in keeping with demand-based approaches concerning training products and mechanisms required by the explicit or implicit strategies implemented, and better responding to the developmental challenges facing the countries. A graphic representation will allow to compare the data collected and analysed from each fund (between what exists and what is desirable) and especially to highlight the points on which their relevance and effectiveness need to be optimised.

Finally, it will concern comparing all the data collected and represented to the initial assumptions. Is there the possibility of modelling, in a homogenous manner, the financial instrumentations of vocational training in countries where the majority of jobs are in the modern sector and those in countries where the informal sector represents up to 80% of existing jobs and up to 90% of new jobs? Is there an ideal type of organisation of the funds, or at least an ideal type of their main functions that expresses the missions and results assigned to them? This is the ultimate question that this study will try to answer and from which will follow on the final recommendations that will end the field survey in the five countries selected.

4.3.1 The South African “integrated development” fund

There is no doubt the structuring of vocational training finance in South Africa has specific features that can be characterised under the fund's term of “integrated development.” This integration has de facto multiple significances which are as follows:

- Integration of the economic dimension (sectoral funds or SETAs) and of the social dimension (national fund or NSF) or, in other terms, the competitive dimension with the requirement of equity.
- Integration of the regional dimension (vocational integration of job seekers) and of the sectoral dimension (development of the professional skills of workers and of job seekers who are given work).
- Integration of the “skills development and acquisition” dimension in the national qualifications system.
- Integration of players from the informal sector in the NSF's but also the SETAs' training objectives.
- More globally, the integration of finance objectives in a multi-annual strategic plan (2005-2010) that sets the main objectives to be reached.
- And finally, integration of the black population into all aspects of the country's economic and social life.

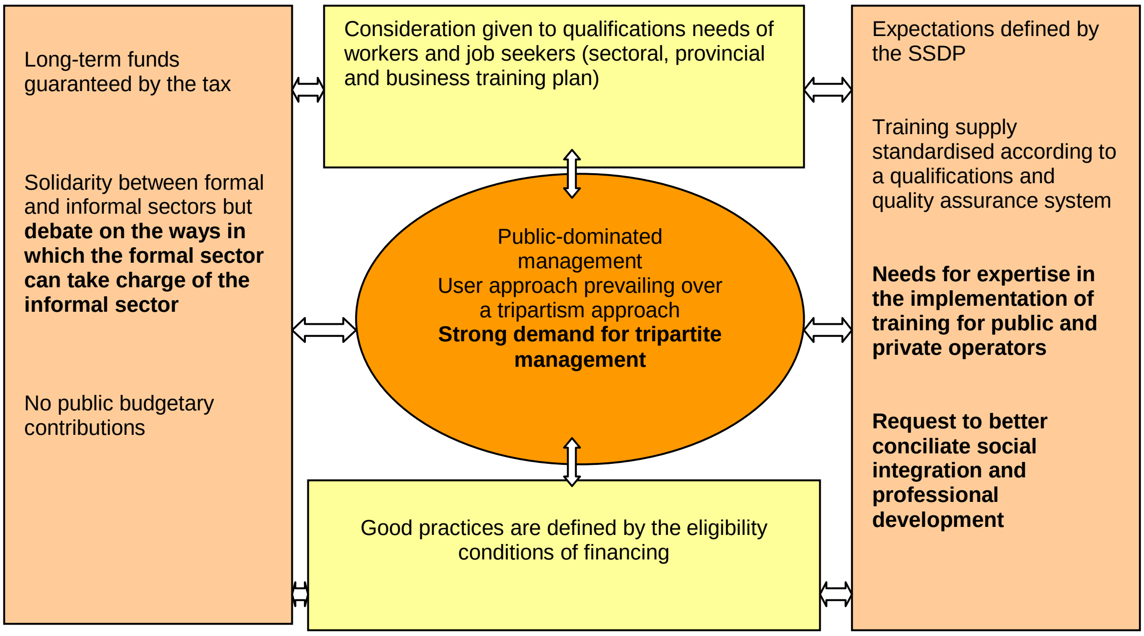


Integration of the South African funds into strategic planning, MAE, 2006

Expressed in terms of strategic integration, the situation of South African funds is in keeping with a finance practice that makes sense based on overall objectives set by the Strategic Skills Development Plan (SSDP); that of skills-based training that fulfils the economic development objectives while at the same time integrating disadvantaged populations as much as possible into qualifications and employment.

Represented in a systemic form, the funds present (despite and perhaps because of their very strong integrating nature) a certain number of critical points that were raised all throughout the survey:

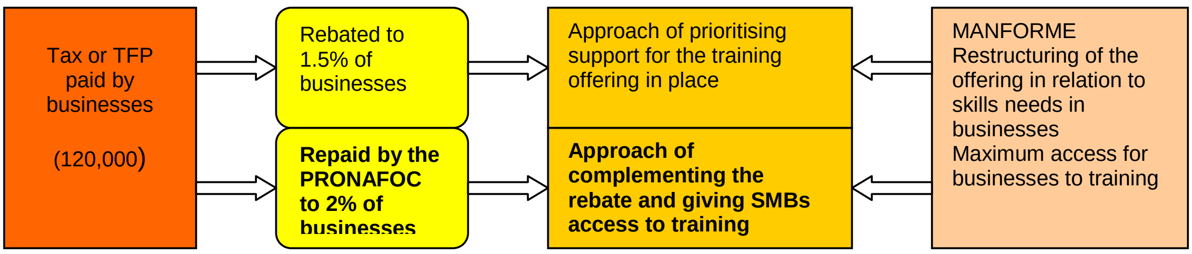
- Very "public" steering of all the financing, particularly due to the very large representation of users and to the absence of real tripartism at the level of consultation and decision-making bodies.
- A significant difference between a training market that is apparently very organised and the real capability of players to correspond to set objectives: under-allocation of resources available due the lack of efficiency of certain SETAs, difficulties in generalising training in a workplace situation due to the lack of instructors for instructors and of experienced tutors, difficulties also in generalising a quality culture and quality management despite the strong incentives of the system in place.
- Low access to training for small and medium-sized businesses which has led certain SETAs to create training cheques intended to simplify and encourage this access.
- The complexity of coordinated management of finance with an economic and social objective which continuously raises the issue of priorities to be chosen: should one integrate people socially in order to accelerate development or rather should one produce more and better in order to better integrate them?
- The relationship between training in the formal and informal sectors: there is a difference in viewpoint at this level, some want the training mechanism to be the same for both sectors, others want a specific approach and offering to be implemented for informal production and service units.



The functional optimisation diagram of South African funds, MAE, 2006

4.3.2. The Tunisian "dual development" fund

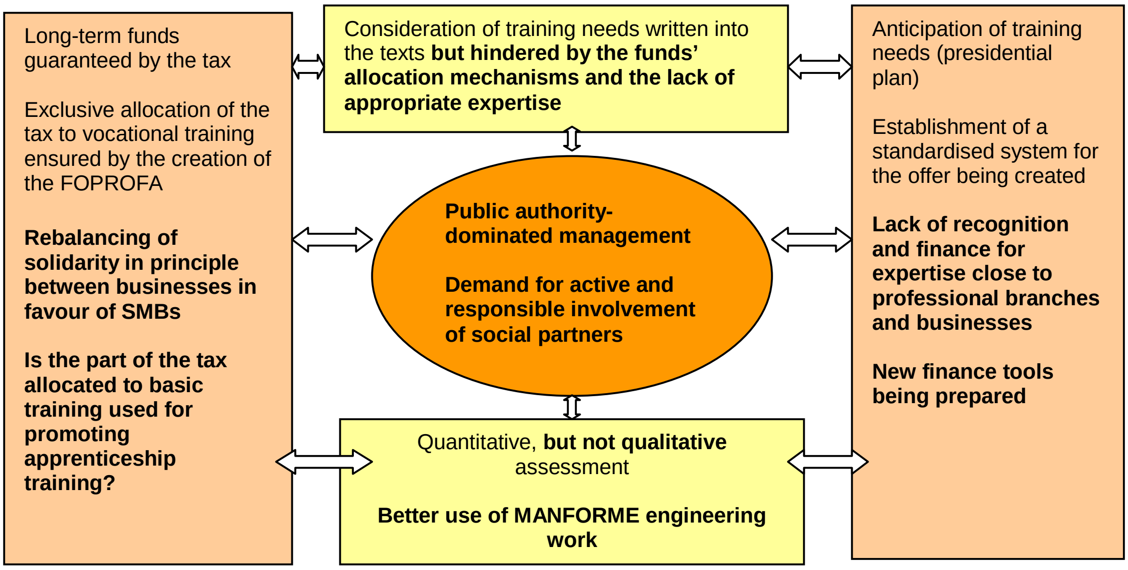
In terms of a strategic approach, the Tunisian situation is characterised by an approach that is divergent or at least little coordinated between the finance system and the vocational training reform system. The first part, which is based on the collection of a tax established 50 years ago, mainly works according to the principles of a regulated rebate of the funds collected. This system favours businesses with good knowledge of the regulations and the training providers adapted to this regulation. The second, symbolised by the MANFORME programme, has redirected its entire training offering towards taking economic demand into consideration and towards a skills acquisition mechanism in relation with employment and qualifications needs. As a result, there is a lack of support from financial instruments in place for the MANFORME programme, which can go as far as counteracting the ongoing momentum of reform.



The dual strategy of Tunisian financing, MAE, 2006

Regarding the funds' operation, the policy-makers encountered have made a certain number of critical assessments and expressed their desire for improvements to be made:

- Redistribution of the finance will have to be carried out in relation to greater demands for equality and equity.
- The application process to be implemented should be based more on expertise in diagnostics and training engineering and this expertise should be close to the economic and professional players and better still, should be from their organisations.
- The future management of resource allocation should be carried out jointly by all partners.



The functional optimisation diagram of Tunisian funds, MAE, 2006

Furthermore, the current instruments will have to be redefined:

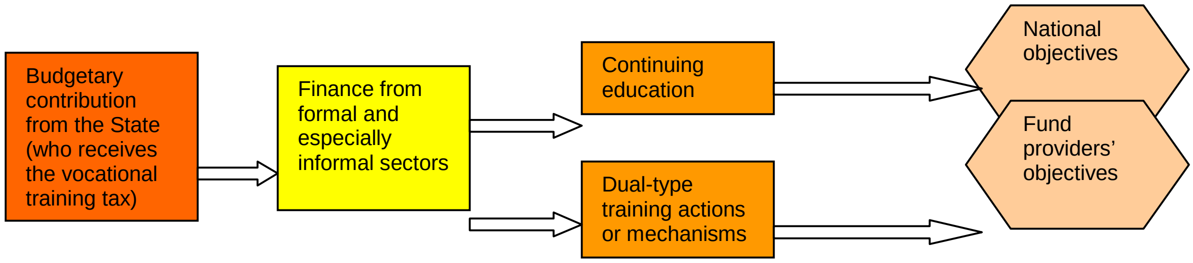
- by pooling and increasing the different resources,
- by simplifying access conditions,
- by establishing a one-stop office,
- by organising clear contractualisation between businesses and their service providers (creating competition based on clear objectives and specifications),
- by creating an accreditation system for service providers,
- by creating a quality system both for the collection and allocation of funds,
- by implementing new instruments as part of a continuous consultation process in compliance with the existing partnership framework.

All of these observations allow us to draw up a functional diagram of the Tunisian funds that strongly leans towards the need for restructuring the financial instrumentation in place. This restructuring is in fact planned by the government as the presidential programme of 2005-2009 includes the creation and implementation of training cheques, drawing rights and tax credits in its planned actions. According to policy-makers at the Ministry of Education and Vocational Training "the qualitative jump for the reform during the 2005-2009 period requires revision of the rebate system and that of continuing education financing in order to meet the challenge of improving the competitiveness of businesses and the employability of workers."

4.3.3. The "established and multi-objective" funds of Sub-Saharan African countries

The three Sub-Saharan African countries, Benin, Burkina Faso and Mali do not have a very similar history as the FODEFCA and the FAFPA in Mali were created with the help of the World Bank, which was not the case for the FAFPA of Burkina Faso. Furthermore, contrary to the two other funds, this fund has the distinctive characteristic of being at the very beginning of its operation. However, the three funds do have enough similarities to be classified under the same typological identity.

In terms of a development approach, the three funds differentiate themselves through four characteristics: i) all three of them are funded by the budget from the State who receives the tax paid by the modern sector and partially transforms it into an annual contribution, ii) they establish a de facto solidarity between the formal and informal sectors, iii) they intervene directly or indirectly in the implementation of dual-type apprenticeship actions or mechanisms with certain players from the informal sector and iv) they act under the joint or separate influence of international technical and financial assistance providers and national authorities.



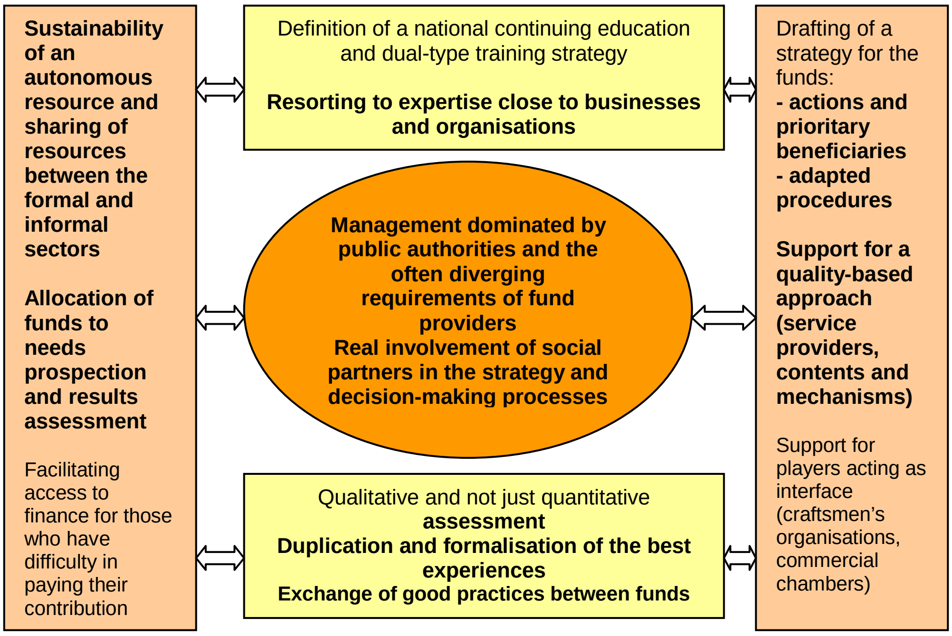
The multi-objective strategy of the Sub-Saharan training funds, MAE, 2006

In terms of operation, the three funds are very similar, to the extent that their policy-makers are drafting a common manual for their operating and application procedures. These similarities are as follows:

- They are managed by a public establishment with a specific characteristic and according to the same levels of responsibility (management board that makes decisions concerning the selection and financing of actions, management in charge of implementation under the management board's responsibility, functional, administrative and technical units, study and information units). All three formally have administrative and financial autonomy.
- They affirm the priority role of tripartism, even though this tripartism is weakened by the weight of commercial organisations with an approach of representing users in Mali, by a stronger power (albeit consensual) of the State representative in Burkina Faso, and by a certain passiveness of the only real tripartite board in Benin.
- They have, along with the final recipients of the finance, professional craftsmen's organisations and commercial organisations as an interface.
- They jointly express the need for developing a quality approach in relation to service providers and reinforcing their intervention potential.
- Finally, all three lack definition of a veritable national strategy: implementation of a structured continuing education and dual-type apprenticeship policy, definition of actions and priority beneficiaries to be supported and adaptation of application procedures in relation to these priorities.

On the other hand, whereas the FODEFCA calls on external assessors, the two FAFPAs have a tendency to recruit internal advisors and assessors while at the same time affirming the need to call on experts who are as close as possible to the expression of needs by businesses.

The conjunction of all these common points allows us to represent the three funds in the same functional diagram.



The functional optimisation diagram of Sub-Saharan funds, MAE, 2006

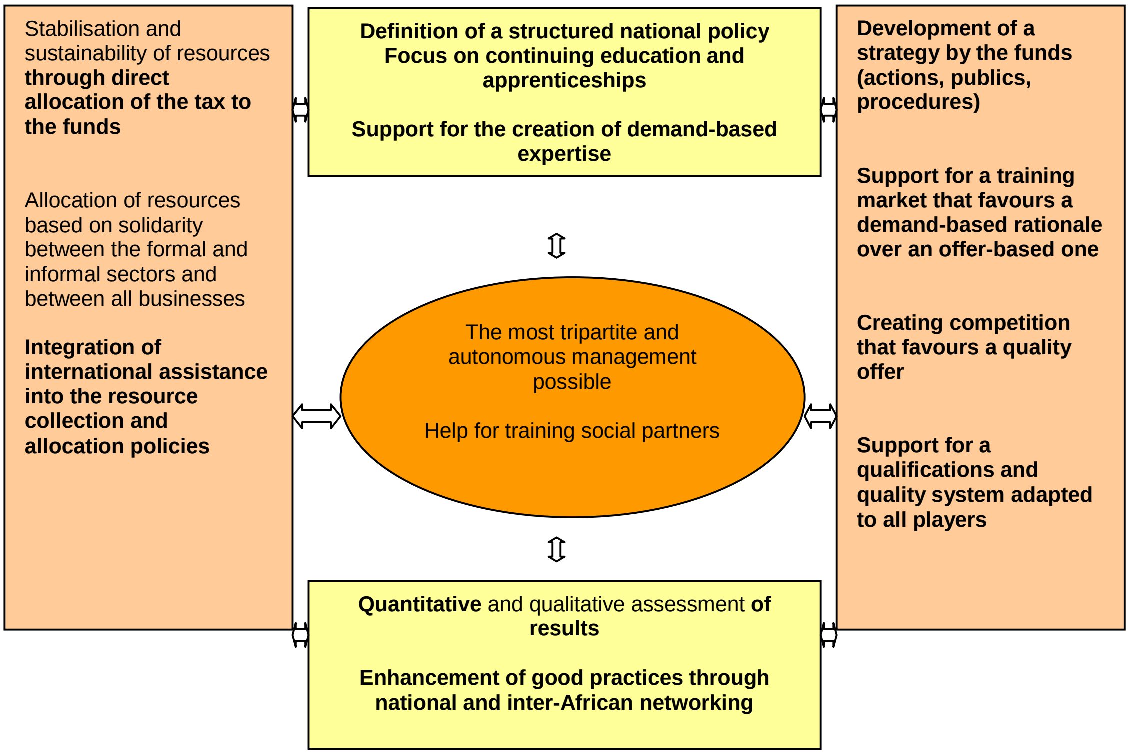
4.3.4. The main outline of an ideal type of fund common to the five countries surveyed

Overall analysis of the study has highlighted the relationships existing between the distinctive characteristics of each fund (objectives, institutional realities, application, assessment and finance methods, organisation of the training market and finally, continuing education and apprenticeship mechanisms) and the economic and historical context of the country in which it is deeply rooted. However, cross-spanning analysis using common parameters as well as analysis of the differences existing between the initial assumptions and the final conclusions of the funds studied, has revealed elements that are common and above all useful in order to reach maximum efficiency and impact in relation to the objectives set for them. These elements are grouped under the form of an ideal type whose objective is not to represent reality but rather to modelise it so as to then better analyse it and understand it.

The elements chosen in the ideal type common to the five countries are as follows:

- the definition of a structured national policy on basic training, apprenticeships and continuing education,
- the focussing of the funds' missions on continuing education and apprenticeships,
- the development of a strategy by the funds (definition of actions, beneficiaries and procedures) in relation to the objectives to be reached,
- the stabilisation and sustainability of resources through direct allocation of the vocational training tax to the funds,
- the integration of international assistance into the objectives and means of the national policy,
- the most tripartite and autonomous management possible for allocating resources,
- help for social partners to acquire the necessary skills to carry out their responsibilities in the field of vocational training,
- support for the creation and setting-up of expertise close to companies and branches or professional organisations,
- support for a training market that favours a demand-based response over a supply-based one,
- simplified application procedures making competition conditional on the structuring of a quality offering,
- an allocation of resources based on solidarity between the modern and informal sectors and between small, medium and large-sized businesses,
- support for the implementation of a system of qualifications and quality that integrate the specificities of training in the informal sector,

- finally, the quantitative and qualitative assessment of the results, the identification of good practices and their enhancement through networking at national and inter-African levels.



The functional diagram of the ideal type of African Funds, MAE, 2006

Conclusion: typology that is more common than differential concerning the funds

The study's terms of reference required specification of the differences that may exist between the Francophone funds of Northern Africa, the Francophone funds of Sub-Saharan Africa and the Anglophone funds of South Africa. At the end of the analysis, it appeared that the underlying typological differences identified between the funds were based more so on the levels of economic and social situations in the countries concerned, the political and institutional contexts on the launch of each fund, the roles and requirements of the international fund providers, the procedures for implementing resource collection and allocation, and finally, the solidarity established between the different sectors of activity, than on the existence of cultural and linguistic barriers acquired through history.

The functional diagram of the ideal type common to all funds shows that there are more elements uniting them than differences dividing them. The main differences undoubtedly are the countries' capacity or not to integrate assistance from fund providers into their national policy and strategy and the funds' capacity or not to have their own resources and to use them in the most responsible and autonomous way possible within the framework of a balanced and veritable public/social partners partnership.

5. Some Useful Recommendations

Recommendations are made as a result of the modelisation work on the funds' optimal operation. Through conclusive reflection, these recommendations develop the most urgent or the most structuring transformation strategies to be implemented by the funds studied.

5.1. Stating the funds' objectives and their link to basic vocational training

The first transformation strategy and perhaps the most important as it conditions the capacities, the public and the operation of the funds, is that of clarifying their objectives. Vocational training is understood as a whole, encompassing the skills necessary for young people to integrate the working world as well as those necessary for the workforce to improve their productivity and the quality of their services and to adapt to changes in demand and in technology. This concept is a guarantee of better adaptation of training mechanisms, especially of basic training, to economic needs. It constitutes undeniable progress in relation to the situation created by technical education which prepares students more for diplomas than for trades. In many of the countries studied, such a concept led to institutionally separating basic vocational training from national education.

With this situation two major problems remain: firstly, even when vocational training is externalised outside of the field of education, it cannot be conceived and organised independently of the management of student flows at the end of basic education. Fulfilling the Millennium Goal of universal primary education and the necessary control of student flows directed towards the second half of secondary school and then towards university require that the greater majority of young people benefit from vocational training at the end of primary school. The definition of this policy cannot be left to the funds by default. Benin has shown the relevance of having a national dual-type apprenticeship policy, even if all the conclusions in terms of financing between the Ministry of Technical and Vocational Education and Training and the FODEFCA have not been drawn.

Secondly, while the financial involvement of businesses and trainees can be justified by the advantages they obtain in vocational training, the financing of basic vocational training cannot be left uniquely to them as it would mean an excessive cost for them. Budgetary finance from the State seems necessary, and it should by progressively increased by reconsidering the role of technical education which consumes a large amount of budgetary credit for little efficiency. Furthermore, it responds to a need for equity in relation to secondary and higher education that is practically free. In Sub-Saharan Africa, this finance should not however be confused with budgetary contributions allocated to the FODEFCA and to the FAFPA which are only substitutes for the amounts of payroll taxes due to them.

5.2. Ensuring real autonomy of financial resources in relation to the State in compliance with the strategies implemented

With the exception of South Africa, the funds do not have real control of their financial resources. In the Sub-Saharan African countries, they rely both on the Parliament's passing of the State's annual budget and the good will of the Public Treasury to pay the funds. This double dependency creates de facto unpredictability of resources and potential strains on cash flow. In Tunisia, the situation is reversed. While the vocational training tax is distinctly separated from the State budget, part of it is used for the financing of training centres which was once ensured by this same State budget.

Autonomy of resources is an objective whose fulfilment is most often in contradiction with the financial constraints of the State. For this reason also it remains essential. Without control of resources by the funds' managers, it would be impossible to define a veritable training strategy in their own fields.

In Sub-Saharan Africa where “vocational training” quasi-taxes existed before the funds were created, it is desirable that the fraction which is allocated to them be clearly identified and directly collected, for example simultaneously to social welfare contributions.

In Tunisia, the presence of social partners in the decision-making bodies of the FOPROFA seems necessary for the well-reasoned sharing of the tax between continuing education and training in centres.

5.3. Better adapting the financial instruments to the situations and requirements of micro, small and medium-sized businesses

It appears in each of the five countries studied, that the methods implemented for allocating resources makes it difficult or even impossible for the smallest businesses to access the finance intended for them.

Thus, in South Africa as in Tunisia, the standardisation of tax rebate procedures naturally favours large businesses with good knowledge of the administrative procedures and with the competent personnel to apply them. While the SETAs have begun to react to this situation with a proactive attitude in relation to small businesses (creation of a special training cheque), they still need to reinforce the capacity of these businesses to train their employees according to the methodologies prescribed in workplace professionalisation or learnerships. In Tunisia, the PRONAFOC is trying to allow a maximum of SMBs to benefit from the vocational training tax, but their effort is not counteracting the fact that most of this tax is still being swallowed up by large businesses. The situation is even more paradoxical as the Tunisian industrial fabric is mainly composed of small and very small businesses.

The countries of Sub-Saharan Africa have made the choice of financing the informal sector and especially micro businesses in production and services. Nevertheless, in the three countries the legitimate contribution asked of craftsmen and professionals in order for them to access finance is an insurmountable obstacle. French and Swiss technical assistance have found solutions to remedy this situation. It is absolutely necessary that the funds envisage (with or without their support) the development of allocation procedures that are in relation with the real contribution capacities of players who need financial support the most in order to move away from the survival mentality and enter the realm of development.

5.4. Financing the structuring of training demand as much as the training itself

It was logical that the funds begin with the most simple: financing training by addressing training bodies already carrying out training. The actual move from a supply-based to a demand-based approach implies leaving this framework and the financing of pre-formatted training courses in favour of building appropriate responses for applicants’ needs. Up until now, this approach came up against two obstacles: the scarcity of expertise in training engineering and the low demand for training (which makes the drafting of specific responses costly). Improving the skills of certain training engineers and creating ad hoc training bodies that intervened in recent years, especially with the support of French Cooperation, have removed the first obstacle somewhat. It is still necessary that these experts are actually called on by businesses, applicants and by the funds. It is therefore desirable that the latter plan to devote part of their resources to them under conditions that avoid inflation of costs.

Low demand, especially in Sub-Saharan Africa, is linked to its capacity to become solvent. Swisscontact’s financial support for craftsmen partly addresses this concern. But it has not succeeded in overcoming the reluctance of some craftsmen to pay for their training despite the advantages highlighted by some available studies. These advantages are however unequal depending on the trades and are often linked to the possibilities of acquiring higher performing equipment and proposing services of better quality or that are better adapted to demand. If the principle of co-payment is to be maintained, it is necessary to pay more attention to the economic results of the training carried out.

This issue especially should be taken into account from the moment demand is structured and should in some way be part of the specifications.

5.5. Encouraging exchange between the different African funds and promoting social dialogue among them

The survey led to the observation that certain funds had begun to exchange and cooperate in areas of common interest. Thus, the FAFPA in Burkina Faso along with the funds from Côte d'Ivoire and Mali (FDFP and FAFPA) created a common manual for procedures which is being finalised. According to the GTZ encountered in South Africa, there is a cooperation project between certain southern African countries on the problems of financing and implementing training.

The idea already proposed, following the documentary study on thirteen African funds, of creating a network to exchange information and experiences between countries therefore seems legitimate in the observation of cooperation already existing both in Sub-Saharan and southern Africa. It takes on a new perspective, however, insofar as nothing prevents it from going beyond a Francophone network and including Anglophone and Lusophone countries in the same approach of sharing experiences and cooperation. The similarity of questions raised and issues to be resolved as well as the proximity of functional diagrams argues in favour of this.

The objective of this network should be to encourage sharing and the synergistic effect of questioning and brainstorming between the funds, and thus allow them to interactively analyse the optimum conditions of their operation and their finance practices. It could in this way encourage international fund providers to better target their interventions and help country policy-makers to better define the intervention strategies of the funds and to better sustain the resources likely to implement these.

This network should not be mainly intended for the funds' management personnel. It should be at management board level, it should encourage the deepening of issues common to all countries and it should be in keeping with a prospect of developing social dialogue between countries and at continent level.

Finally, it should help to develop the African centres of expertise in the field of vocational training and apprenticeship. Africa needs to mobilise all the training engineers, advisors and professionals available in order to create the conditions for the qualitative jump to be accomplished to allow both formal and informal economies to move away from the survival mentality and to enter the virtuous circle of a progressive and sustainable development approach, through active policies financing the development of skills and qualifications of both young people and adults.

Annex 1: List of Abbreviations

ATFP: Tunisian Vocational Training Agency

ANETI: National Agency for Employment and Independent Work

CAB: Benin Chamber of Agriculture

CCIA-BF: Burkina Faso Chamber of Commerce, Industry and Handicrafts

CCIB: Benin Chamber of Commerce and Industry

CENAFFIF: National Centre for the Training of Trainers and for the Development of Training

CFTRA: Road Transport and Auxiliary Activities Training Centre

CNFCPP: National Centre of Continuous Training and Professional Promotion

CNPB: National Council of Burkinabe Employers

CNPB: National Council of Beninese Employers

CSA: Confederation of Autonomous Trade Unions

CSB: Trade Union Confederation of Burkina Faso

CSTB: Confederation of Beninese Workers' Trade Unions

DNFP: National Vocational Training Directorate

TVET: Technical and Vocational Education and Training

FAFPA: Support Fund for Vocational Training and Apprenticeship

FEDELEC: Electricity and Electronics Federation

FENAB: National Federation of Craftsmen of Benin

FENA BF: National Federation of Craftsmen of Burkina Faso

FIAP: Vocational Integration and Training Fund

FODEFCA: Continuing Education and Apprenticeship Development Fund

FOPROFA: Vocational Training and Apprenticeship Promotion Fund

FPMA: Support Project for Vocational Training and Craftsmen's Professions

GET/FC: Grouping of Continuing Education Establishments

IDA: International Development Association (World Bank)

PRONAFOC: National Continuous Training Programme

MANFORME: Rehabilitation of Vocational Training and Employment

MCPEA: Ministry of Commerce, Enterprise Promotion and Handicrafts

MFE: Ministry of Finance and the Economy

MEFP: Ministry of Education and Vocational Training

MESSRS: Ministry of Second and Third-Level Education and Scientific Research

METFP: Ministry of Technical and Vocational Education and Training

MFPTRA: Ministry of the Civil Service, Labour and Administrative Reform

MTEJ: Ministry of Labour, Employment and Youth

NEDLAC: National, Economic, Development and Labour Council

NSA: National Skills Authority

NSDS: National Strategic Development Plan

NSF: National Skills Fund

OPEL: Professional Organisation for the Electricity Sector

SDPUs: Skills Development Planning Units

SETAs: Sectoral Education and Training Authorities

TDR: Terms of Reference

TPA: Employers’ Apprenticeship Tax

TFP: Vocational Training Tax

UAF: Training Support Unit

UEMOA: West African Economic and Monetary Union

PMU: Project Management Unit

UGTT: Tunisian General Labour Union

UPI: Informal Production Unit

WSP: Workplace Skills Plans

Annex 2: List of People Encountered

South Africa

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Mr. Frank Groenewald, Chief Executive Officer, BANKSETA

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Mr. Vusi Mabena, Skills Development Adviser, Chamber of Mines of South Africa

Delegation of the European Union to South Africa
Alan Munday, Second Secretary
Dr. Isabel Gabashyane, Project Officer (Higher Education)
Dr. Berene Kramer, Education and Training Officer

Department of Labour, German Technical Cooperation
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Bernd Tausche, ALMS Programme Technical Adviser

South African Experts
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Sybile Chabane, Development Strategy Member
Lindsay Falkov, Resolved Group

Department of Labour
Contact made with Messrs. Jeffrez Du Preez, Senior Executive Manager NSF and Florus Prinsloo, Acting Deputy Director, Ministry of Labour did not come to fruition for the reason that I did not have an official letter on behalf of the Embassy addressed to the Minister for Vocational Training.

Benin

French Embassy
Mr. Christian Daziano, Ambassador
Mr. André Bailleul, Senior Advisor to the Embassy
Mr. René Boissenin, Head of the SCAC
Mr. Francis Defranoux, Cultural Advisor
Mr. Ludovic Kamchane, Technical Assistant

Agence Française de Développement (French Development Agency)
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Ministry of Technical and Vocational Education and Training

Mrs. Claire Senouvo, Cabinet Director
Mr. Ayouba Amadou, Secretary General
Ms. Basilia Hountondi, Technical Advisor in charge of Reform Monitoring
Mr. Sylvain Zohoun, Deputy Cabinet Director, President of the Project's Steering Committee
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Mr. Sessy Gounougbe

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Mr. Ousmane Arouna, Head of training

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French Embassy

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Mr. Seïdou OUEDRAOGO, President of the FENA-BF

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FAFPA Members

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Mrs. Marie-Asomption SAMBARE, Training Advisor
Mr. Pau BADO, Training Advisor

Training Users

Mr. Lambert YAMEOGO, electrician and employer, member of OPEL
Mr. Idrissa SOHORO, electrician and employer, member of OPEL
Mr. Ousmane NIKIEMA, electrician and employer, President of OPEL
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Mr. Daouda Simbara, Director of Vocational Training

Ministry of Employment and Vocational Training
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Mr. Traoré, Coordinator
Mr. Soufiana A. Maïga, Head of the Continuing Vocational Training Division

National Employers' Council of Mali
Mr. Mobido Tolo, Secretary General

National Federation of Craftsmen of Mali
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Mr. Oumar Diakité, Vice President
Mr. Hammoun Haidara, FNAM Advisor
Mr. Souleyman Diakite, Secretary in charge of Training

Permanent Assembly of the Chambers of Trade of Mali
Mr. Goussou Fofana, President
Mr. Elmehdi Ag Hamaty, Secretary General
Mr. Tobéré Téssougue, Secretary of the Operational Unit of Craftsmen's Vocational Training (jointly FNAM - APCMM)

Chamber of Commerce and Industry of Mali
Mr. Daba Traore, Secretary General, President of FAFPA's Management Board

UFAE – GO
Mr. Alassane Diakite, Director

Tunisia

French Embassy

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Mrs. Caroline VELTCHEFF, Deputy Cultural Advisor
Mr. Roger EYCHENNE, Cooperation Attaché

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Expert

Mr. Saïd BEN SEDRINE, researcher at the National Institute for Labour and Social Studies

Annex 3: Bibliography

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