

# A FRAGILE RECOVERY

Operations and Logistics in Post-Conflict Mali

January 2014

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# I. Introduction<sup>i</sup>

One year ago, in early 2013, Mali was slipping towards the status of failed state. A patchwork of Islamists and separatist movements controlled the northern parts of the country, military leaders from an April coup d'état continued to pull the strings of a fledgling transitional government, and Mali gained international attention as a nexus for the trafficking of drugs and illicit goods across its poorly governed territory.

Without a swift military intervention in January 2013 by France, Mali's former colonizer, the country may have become West Africa's Somalia. French intervention restored state territorial integrity, pushed Islamists from their strongholds, and facilitated the democratic election of a new president and national assembly. The state is reasserting its authority in the three northern regions (although incompletely) and displaced populations are trickling back into their communities.

As Mali emerges from conflict, humanitarian and development actors, international organizations, and foreign investors will require new tools to navigate the post-conflict environment. This report seeks to clarify a complicated setting and facilitate responsible re-engagement by foreign partners by addressing critical factors in logistics and operations planning. This includes the economic environment, government regulations, security environment, transportation networks, communications capabilities, energy and water infrastructure, and banking sector.



Broken Door at Cimetière des Trois Saints (Destroyed by AQIM), Timbuktu (C4ADS)

Inarguably, the entire population of Mali suffered during the crises of 2012 and 2013. However, this report will primarily focus on the capital, Bamako, and the three northern regions: Timbuktu, Gao, and Kidal. The nature of the conflict meant these localities were most affected by instability.

In order to supplement desk research from Washington, DC, the authors travelled to the cities of Bamako, Timbuktu, and Gao in December 2013 to collect original data and conduct interviews with actors in the field. Excerpts from these interviews have been cited where applicable, unless the interviewee requested anonymity or if the information may harm the interests of the individual or organization.

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<sup>i</sup> This report was authored by Eric Wulf and Farley Mesko of c4ads, supported by a grant from Working Partners Foundation International. The opinions stated herein are those of the authors and need not represent those of c4ads, Working Partners Foundation, or their directors or associates.

## II. The Economic Environment

### AN ECONOMY IN RECOVERY...

Unsurprisingly, the Malian economy contracted in 2012. The country was plagued with political instability, elite infighting, a separatist rebellion, 10 months of Islamist rule in the north, and security concerns. A lack of investor confidence and decreased government spending, coupled with the disruption of commerce in the north and the suspension of foreign aid flows, led to a negative real GDP growth of 1.5 percent.<sup>1</sup> This occurred despite impressive domestic growth in the gold and cotton sectors, which are Mali's largest exports.

In 2013, economic forecasts were much more optimistic. The African Development Bank projects the Malian economy to rebound to a 5.4 percent growth rate in 2013, followed by 5.1 percent growth rate in 2014.<sup>2</sup> Increased cotton and gold production, along with increasing world prices, will be significant contributors. Equally as important will be the resumption and increase of foreign aid flows as Mali continues to regain stability. Following Mali's relatively successful and peaceful legislative elections in December, the United States restored Mali to privileged partner status as a reward for its return to democracy.<sup>3</sup> Mali will now be able to take advantage of the Africa Growth and Opportunity Act (AGOA), further encouraging improved economic growth. AGOA was launched by the US Congress in 2000 and facilitates African exports to the US market in order to promote economic development in low-income countries.

Landlocked Mali relies on its neighbors for access to ports and trade. Mali is a member of the Economic Community of West African States (ECOWAS), a bloc of 15 countries that was founded in 1975 to facilitate regional economic integration. The role of ECOWAS has expanded over time. ECOWAS routinely conducts diplomatic affairs between member states and the international community. ECOWAS-led military interventions in the region are increasingly common; for example, ECOWAS was the first international body to organize an intervention after the 2012 crisis in Mali. In December 2012, the United Nations (UN) authorized the ECOWAS mission, which was dubbed the African-led International Support Mission to Mali (AFISMA). However, the mission was plagued by logistical, administrative, and funding problems, which highlighted the region's inability to effectively resolve the Malian crisis by itself. AFISMA had yet to deploy any troops when Islamists surged southward in January 2013. France's decisive and rapid military intervention further underscored the regional body's inadequate response mechanisms. In July 2013, AFISMA's mission officially ended and most AFISMA troops were re-hatted as part of the UN Multidimensional Integrated Stabilization Mission in Mali (MINUSMA).

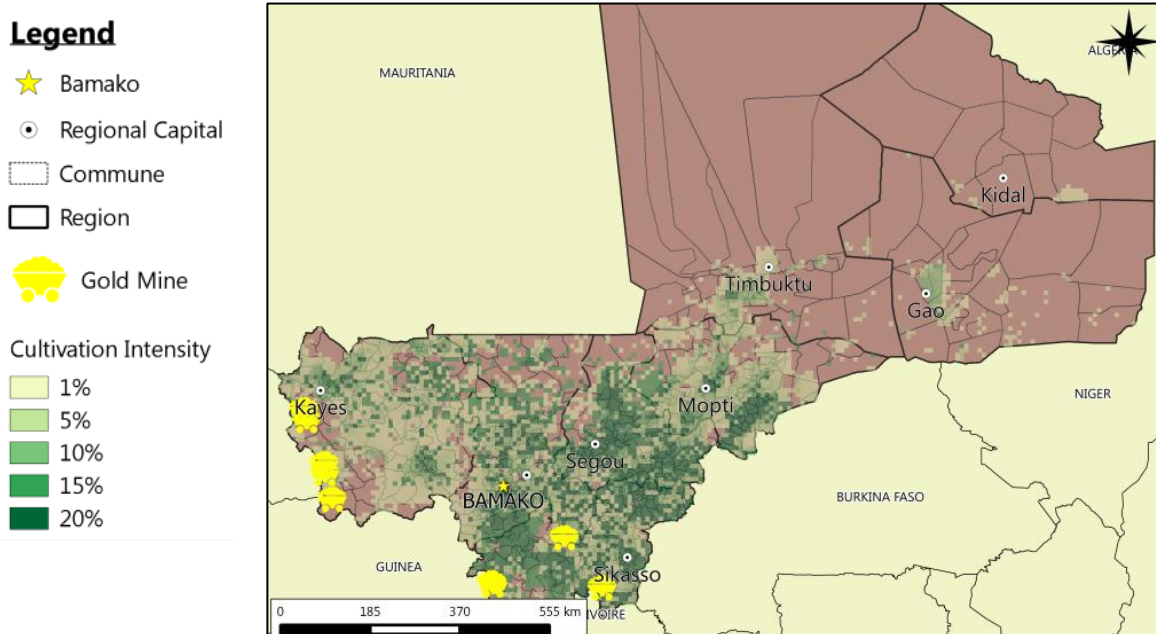
Despite economic shocks in Mali, West and Northwest Africa experienced impressive GDP growth in 2012.<sup>4</sup> One major reason for this is the success of the West Africa Economic and Monetary Union (WAEMU). WAEMU members comprise seven Francophone countries (Benin, Burkina Faso, Côte d'Ivoire, Mali, Niger, Senegal, and Togo) and Lusophone Guinea-Bissau. These eight countries share a common central bank (the Banque Centrale des Etats de l'Afrique de l'Ouest or BCEAO) and a common currency (the West African CFA franc or XOF), which is pegged to the Euro<sup>5</sup> and guaranteed by the French treasury. The BCEAO is designed to stabilize the currency despite exogenous shocks. BCEAO performed this function remarkably well during 2012 and limited inflation within Mali.

### ...BUT CONCENTRATED IN THE SOUTH

Despite an overall economic recovery, economic activity and natural resources are overwhelmingly concentrated in the south. This may imply that this projected growth will have a minimal impact on alleviating the economic malaise in the troubled North.

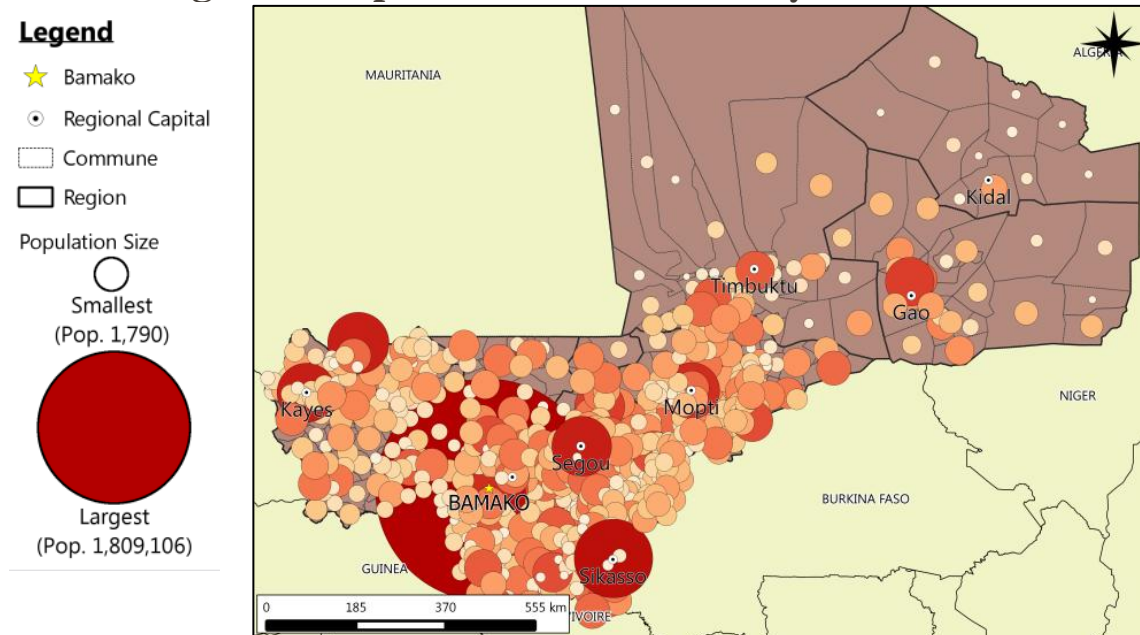
Agriculture and industry represent 36.9 percent and 23.4 percent, respectively, of Mali's GDP.<sup>6</sup> The primary agricultural crops are cotton, millet, and rice. Industrial output is predominantly comprised of raw gold material. Figure 1 and Figure 2 illustrate the extent to which economic activity and human population are concentrated in the southern half of Mali.

**Figure 1. Economic Resources Concentrated in the South**



Sources: Ramankutty (2004); AngloGold Ashanti; Avnel; Endeavour; IAMGOLD; Pearl Gold; Randgold; Resolute

**Figure 2. Population Distribution by Commune**



Source: Mali Institut National de la Statistique Recensement Général de la Population (2009)

Growth in the agriculture and gold industries has the potential to benefit the North if increased government revenues results in increased government spending in these areas. In addition, the North also will benefit from the return of aid flows and activities by international NGOs and relief organizations. However, neither of these secondary benefits directly addresses the primary grievances of Northern populations—a lack of economic opportunities and high levels of unemployment.

The slow return of displaced populations to normal life and economic activity will be a major obstacle to economic recovery in the North. In the city of Timbuktu, the small but economically important Arab population has largely fled the city and has yet to return. Although little information exists on exact numbers, local residents estimate that Arabs represented approximately five percent of the population of Timbuktu before the conflict.<sup>7</sup> Diadié Maïga, President of the Comité de Crise (a local committee formed in April 2012 to coordinate humanitarian access and to serve as an intermediary between the occupiers and the population) told C4ADS that, “commercial activities were controlled by Arabs, who even formed militias to protect their economic interests. However, as the MNLA [National Movement for the Liberation of Azawad] approached the city, many Arabs left.”<sup>8</sup> A second wave of Arabs fled following the return of Malian armed forces to Timbuktu in early 2013. These populations feared armed forces accusing them of collaboration with the Islamist occupiers and carrying out indiscriminate reprisals against light-skinned populations.

In general, residents, local authorities, and humanitarian aid workers characterize the recovery in the North as “timid.”<sup>9</sup> In an interview with Attaher Maïga, head of the International Committee of the Red Cross (ICRC) delegation for Gao and Kidal, he noted that the biggest challenges to recovery are security concerns and encouraging displaced populations to resume their income-generating activities. According to Maïga, “full economic recovery without the return of displaced populations is not possible because communities are highly interdependent. However, these people will not feel safe to return before security is guaranteed.” He also noted that the return of administrators has also been slow, a further impediment to recovery. In his words, “the state is not absent, but there is a timid return. There are still some zones without public administration.”

## A COMPARATIVELY PRO-INVESTOR BUSINESS ENVIRONMENT

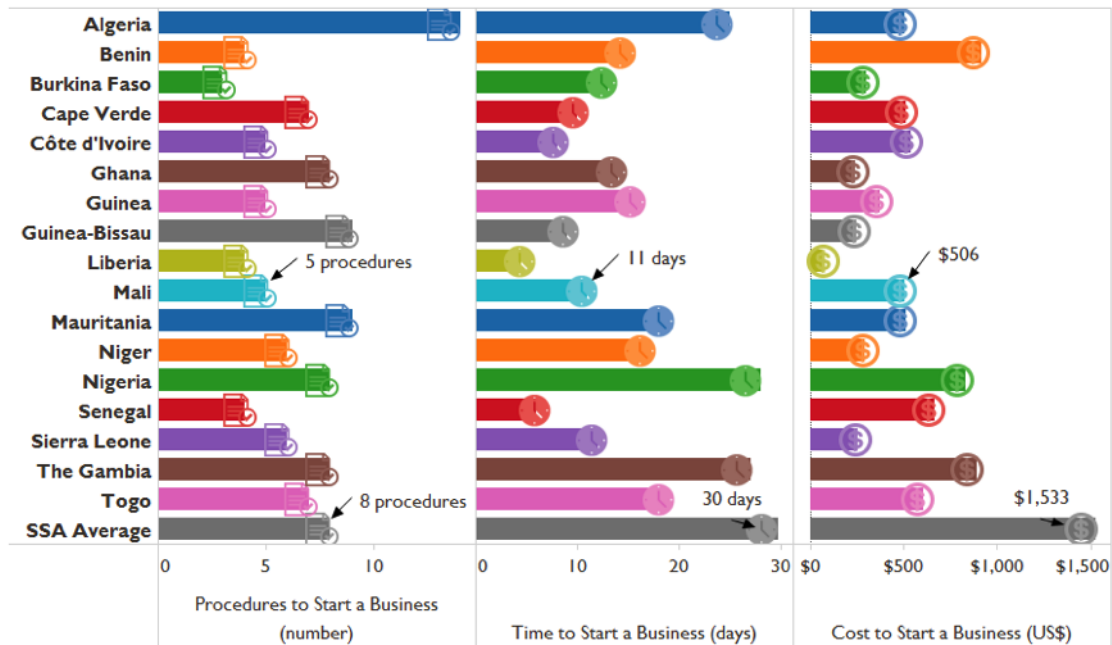
In the early-2000s, Mali began reforming its business sector and increasing incentives for investment in order to stimulate economic growth. This has led to several specific initiatives aimed at attracting foreign investment and the removal of much of the red tape associated with starting and operating a business.

A highlight from these initiatives is the Agence pour la Promotion des Investissements au Mali (Investment Promotion Agency of Mali or API-Mali). The agency seeks to promote and support foreign and domestic investment and improve the overall business climate. French- and English-fluent staff provide advisory services on investment opportunities and guide businesses through administrative regulations and procedures.<sup>10</sup>

As part of its efforts to improve previously cumbersome business registration and regulation processes, API-Mali also launched a sister program, eRegulations Mali, which acts as a single portal for all business operators.<sup>11</sup> eRegulations Mali aims to improve transparency and provide all parties with the step-by-step procedures for registering a business; acquiring permits and licenses; paying taxes; and trading across borders. One entrepreneur in Bamako estimated the total cost of establishing and registering his Société Anonyme à Responsabilité Limitée (equivalent to a US limited liability company) with the government at 1 million XOF (approximately \$2,000).<sup>12</sup>

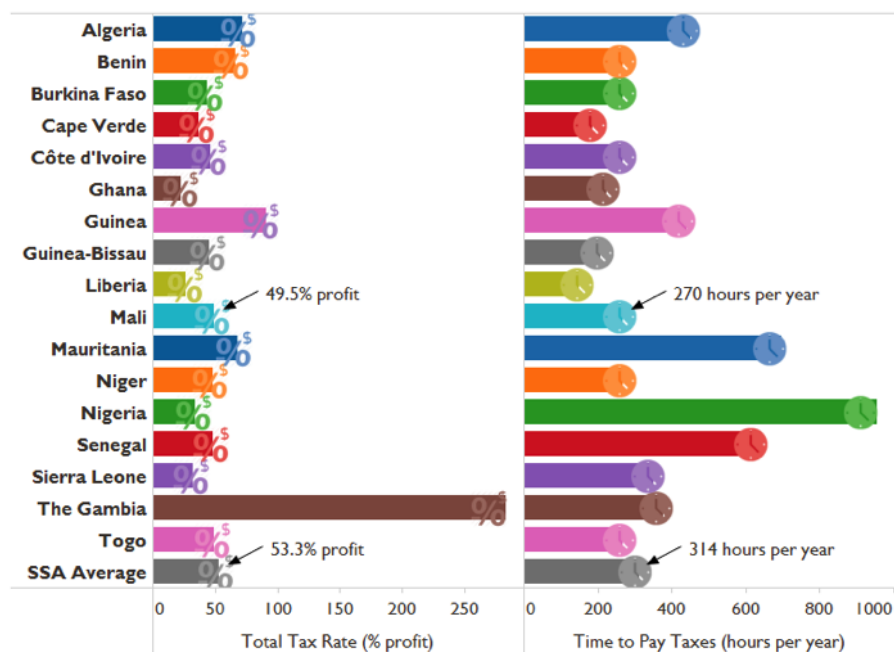
As a result of pro-investment initiatives, the regulatory and tax environment in Mali is relatively friendly compared to other West African countries, and incredibly friendly compared to the average for Sub-Saharan Africa (SSA). Figure 3 and 4 below illustrate Mali's relative standing; the further a country bar extends to the right, the more cumbersome, time-intensive, and expensive its business procedures.

**Figure 3. Comparatively Friendly Entrepreneurial Environment**



Source: Doing Business 2014

**Figure 4. Lower Tax Rate and Less of a Time Burden**



Source: Doing Business 2014

Mali's success should not be overrated, as foreign direct investment in real terms remains relatively low. Mali's low per capita income, fluid political situation, and lingering instability have deterred many potential investors. If the latter two issues can be resolved, opportunities for increased investment are significant.

## III. Government – NGO Relations

### A CUMBERSOME AND OPAQUE REGULATORY ENVIRONMENT

In contrast with the increasingly simplified and streamlined business environment, regulations and administrative procedures for international non-governmental organizations (NGOs) are much less transparent and much more cumbersome. Unsurprisingly, this has resulted in many small NGOs either not formally registering with the government or not fully taking advantage of benefits accorded to NGOs by the government.

There is little publicly available information on specific procedures for registering a NGO in Mali. As a consequence, registration generally requires a personal connection within the national government to facilitate the process. Registration is technically free, but interviews with government officials indicated that civil servants often request bribes to process paperwork.<sup>13</sup>

Officially, NGOs are regulated by the Committee for the Support of Grassroots Development.<sup>14</sup> This committee falls under the supervision of the National Office of the Interior,<sup>15</sup> which is part of the Ministry of Territorial Administration headed by General Moussa Sinko Coulibaly. The Committee for the Support of Grassroots Development was created in 1990 and nominally is tasked with implementing administrative regulations for NGOs and coordinating all development efforts. In practice, however, there is minimal oversight of NGO activities. The lack of an authoritative catalogue of all foreign NGOs inhibits communication and coordination among development and relief workers, and may contribute to the duplication of efforts among NGOs.

Formal registration of an NGO requires several steps, police and background investigations, a significant time investment, and can last several months. Cabinet changes and government shuffling can complicate or delay the process. As a foreign organization, an NGO must first receive the *Autorisation d'Association Etrangère à But Non Lucratif* (Non Profit Foreign Association Authorization) from the government. This agreement is signed between the NGO and the government and was created through law N. 04-38 du 05 Août 2004. A request must be addressed to the Minister of Territorial Administration, but the agreement itself is ultimately signed by the Director of Interior. The *Autorisation d'Association Etrangère à But Non Lucratif* does not grant any special privileges to the organization, but effectively sanctions its activities in the eyes of the government.<sup>16</sup> Although the agreement must be renewed yearly, there are few reporting requirements. Unlike registering a business, which typically can be done in a matter of weeks, it typically takes an NGO at least six months to formally register with the government.

After three years of activity, an organization is eligible to initiate the process of the *Accord-Cadre*, which grants special privileges to organization, but this is not a requirement and an organization can operate under the *Autorisation d'Association Etrangère à But Non Lucratif* indefinitely.

## THE IMPORTANT, BUT ELUSIVE, ACCORD-CADRE

The Accord-Cadre<sup>17</sup> is an agreement made between the government of Mali and an NGO that defines the NGO's activities and its relationship with the government more explicitly than the Autorisation d'Association Etrangère à But Non Lucratif. In the agreement, the NGO must explicitly state the type of work to be carried out and in which localities. The NGO also must agree to submit an annual activities and financial report to the Committee for the Support of Grassroots Development. The government pledges to assist the NGO to the best of its ability, and also exonerates it from most customs fees and taxes.

Signatories of the Accord-Cadre are exempted from droits de douane (tariffs) and the value added tax on materials, supplies, equipment, and technical devices related to the execution of the NGO's projects. However, this exemption does not apply to certain items such as imported vehicles, automotive parts, fuel, and household appliances. In addition, the followings taxes must still be paid: the Redevance statistique (RS, 1%), WAEMU's prélèvement communautaire de solidarité (PCS, 1%), and ECOWAS' prélèvement communautaire (0.5%).

In order to benefit from these exemptions, NGOs must be registered by the tax administration and have a valid Numéro d'Identification Fiscale (Fiscal Identification Number), which is a separate process from the Accord-Cadre.

Despite the benefits accorded to an NGO by the Accord-Cadre, many small NGO's continue to operate informally within the country or under the Autorisation d'Association Etrangère à But Non Lucratif. Most frequently, the NGO lacks the knowledge, personal connections, and/or resources to fulfill the associated requirements. However, some organizations may refrain from pursuing the Accord-Cadre due to the increased government oversight and more stringent reporting requirements.

The current situation is beneficial to neither the government nor the NGO community. It results in eligible NGOs not benefitting from certain tax exemptions and inhibits coordination between humanitarian/development actors and the government.

In the absence of clear information and a transparent process, local private consulting services have arisen to navigate NGOs through the registration process by leveraging personal connections and an intimate knowledge of government procedures.<sup>18</sup>

## SIZE MATTERS

Findings from field research and interviews indicate a strong positive correlation between the size of the NGO and its level of cooperation with the national government. Smaller NGOs often have little interaction with the national government, and rely on key local authorities to implement projects.

Representatives from larger NGOs, including Médecins du Monde and the ICRC, reported a close relationship with key personnel in the national government.<sup>19</sup> They often partner with government ministries to implement projects and hold regular meetings with government officials. However, respondents noted that they have considerable autonomy when choosing their project sites, and rely on their own needs assessments and analyses. Larger NGOs sometimes consult local government authorities (mayors, governors, etc.) before executing a project, but their buy-in appears less important and is not mandatory. A common strategy among many NGOs is to work through local organizations in order to build partnerships in the community and develop local capacities. However, this also raises the potential for mismanagement and diversion of funds.

These local organizations often are not held to the same reporting requirements or accountability standards as their larger counterparts, and often are led by local notables with personal agendas.<sup>20</sup> To mitigate local misappropriation and corruption, the ICRC does not use implementing partners and delivers aid to affected populations directly.

Interviews with smaller NGOs revealed that local government buy-in is much more important for the success of their efforts.<sup>21</sup> Contacts at local community health centers, education facilities, and the mayor's office are more useful for expediting administrative obstacles and facilitating work than national government officials in Bamako. Some interviewees expressed disdain for inefficiencies within the national government and reported that its representatives had little effect on the success of their work.<sup>22</sup>

As of December 2013, many large international NGOs had returned to the regional capitals of Timbuktu and Gao, but security conditions limit their presence in many rural areas as well as the region of Kidal. Organizations present in these cities include the ICRC, Save the Children, Oxfam, Plan International, Médecins du Monde, Médecins Sans Frontières, and Handicap International. Large international networks, experienced personnel, and large amounts of resources facilitate these organizations' ability to operate in unstable zones. However, high operating costs are a major challenge to NGO operations in these areas. Fadima Maïga, Oxfam Program Manager in Gao, told C4ADS that the costs of support operations often are more expensive than relief activities. In her words: "many of our donors do not agree with this, so it makes it more difficult for us to receive funding and continue to serve vulnerable populations."<sup>23</sup>

## IV. The Security Environment

### LINGERING INSTABILITY

The French-led liberation of the three primary cities in northern Mali—Gao, Timbuktu, and Kidal—was completed by the end of January 2013. The primary objectives of Operation Serval—restoring territorial sovereignty and ousting Islamic terrorists from their strongholds—had been achieved. Since then, both Malian and MINUSMA forces have strengthened French positions in the North. The 6,347 strong MINUSMA force is tasked with peacekeeping and policing duties in major northern cities. France will gradually reduce its presence from a force of about 4,500 at the height of the crisis to 1,600 by the middle of February 2014, before scaling down to 1,000. According to French President Francois Holland, these residual troops will focus on fighting any threat that may resurface from terrorist groups still present in the region.<sup>24</sup>

This large military presence has not prevented lingering insecurity, civilian unrest, internal military divisions, and intermittent terrorist attacks that continue to pose a significant challenge to normal operations in the country. In a November press release, Christoph Luedi, head of the ICRC delegation in Mali, said that, "conflict continues to have an effect on the functioning of health facilities, which struggle mightily to meet people's needs without outside support."<sup>25</sup>

Alarmingly, there has been violence against civilians by UN peacekeepers. Between September 19 and 20, around 100 Chadian soldiers in Mali, operating as part of the MINUSMA peacekeeping force, were accused of sexual abuse and other serious misconduct against civilians in Gao.<sup>26</sup> Reportedly, the soldiers deserted their post in Tessalit and descended upon Gao to demand payment of arrears. While incidents of crime against civilians by UN forces are not a new phenomenon, authorities should continue to carefully monitor and investigate the issue.

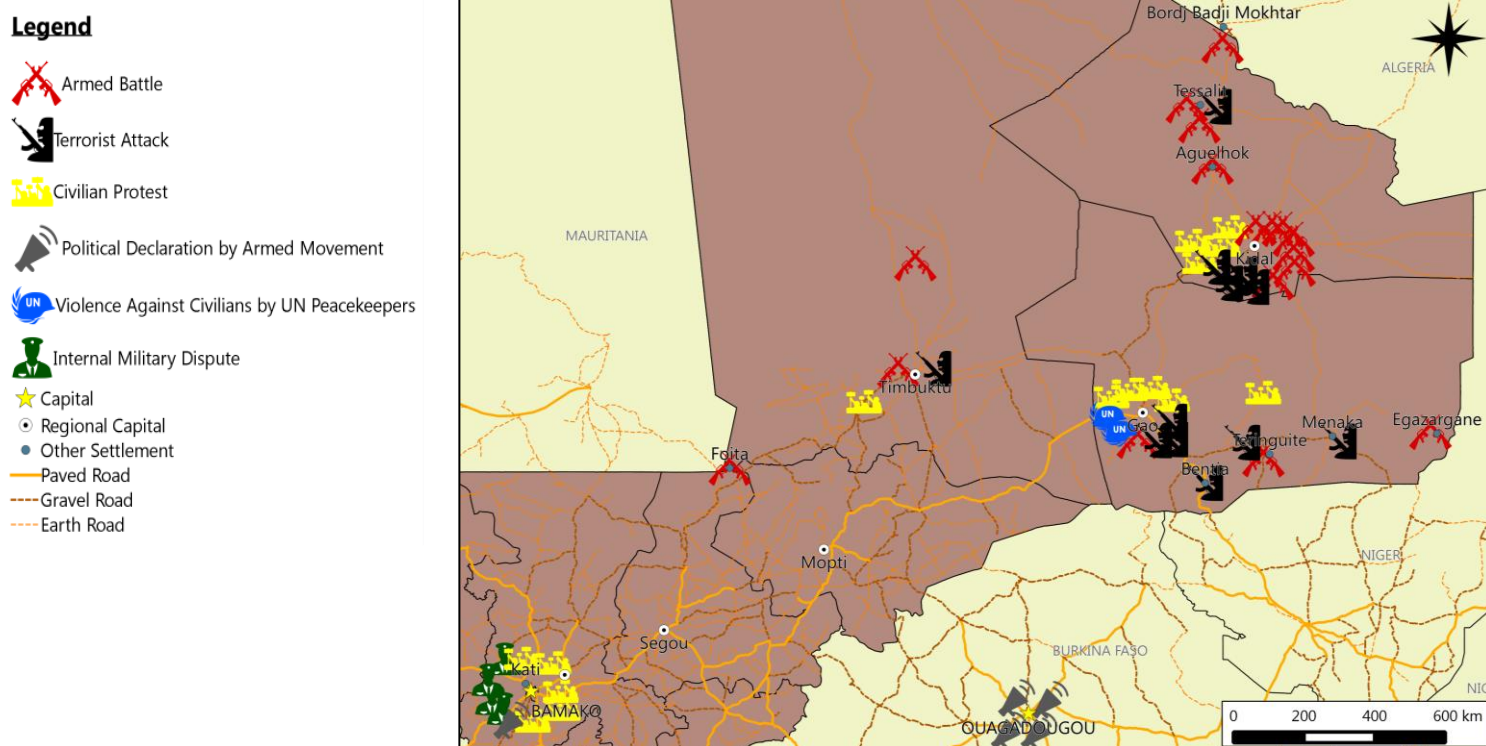
While the security situation remains tenuous in all three northern regions, the South remains relatively stable. An international development organization's safety and security director told C4ADS, "the situation is predictable and most threats are well known. Up to Ségou is quite manageable for humanitarian and development organizations. When you reach Mopti, however, it starts to become a little more questionable."<sup>27</sup>

On August 11, Malians turned out in record numbers for the second round of voting in its first democratic election since the March 2012 coup d'état. Career politician Ibrahim Boubacar Keïta emerged as president. The international community lauded the election for its high participation rate, clear mandate given to the winner, and the largely peaceful conditions in which it took place.<sup>28</sup>

This initial optimism has abated as security issues continue to pose threats in all three regions of the North, as well as Bamako. Most international NGOs that continue to operate in northern Mali have limited staff in Mopti, Timbuktu, Gao, and Kidal due to the security situation.<sup>29</sup> In addition, none has permanent Western staff in these cities due to kidnapping concerns. A Mali analyst from the US government warned C4ADS that, "the security environment in Gao, Timbuktu, and Kidal is not safe for the return of Westerners. AQIM [al-Qaida in the Islamic Maghreb] and MUJAO [Movement for Oneness and Jihad in West Africa] are not gone, they are just hiding. These regions require a permanent military presence."<sup>30</sup>

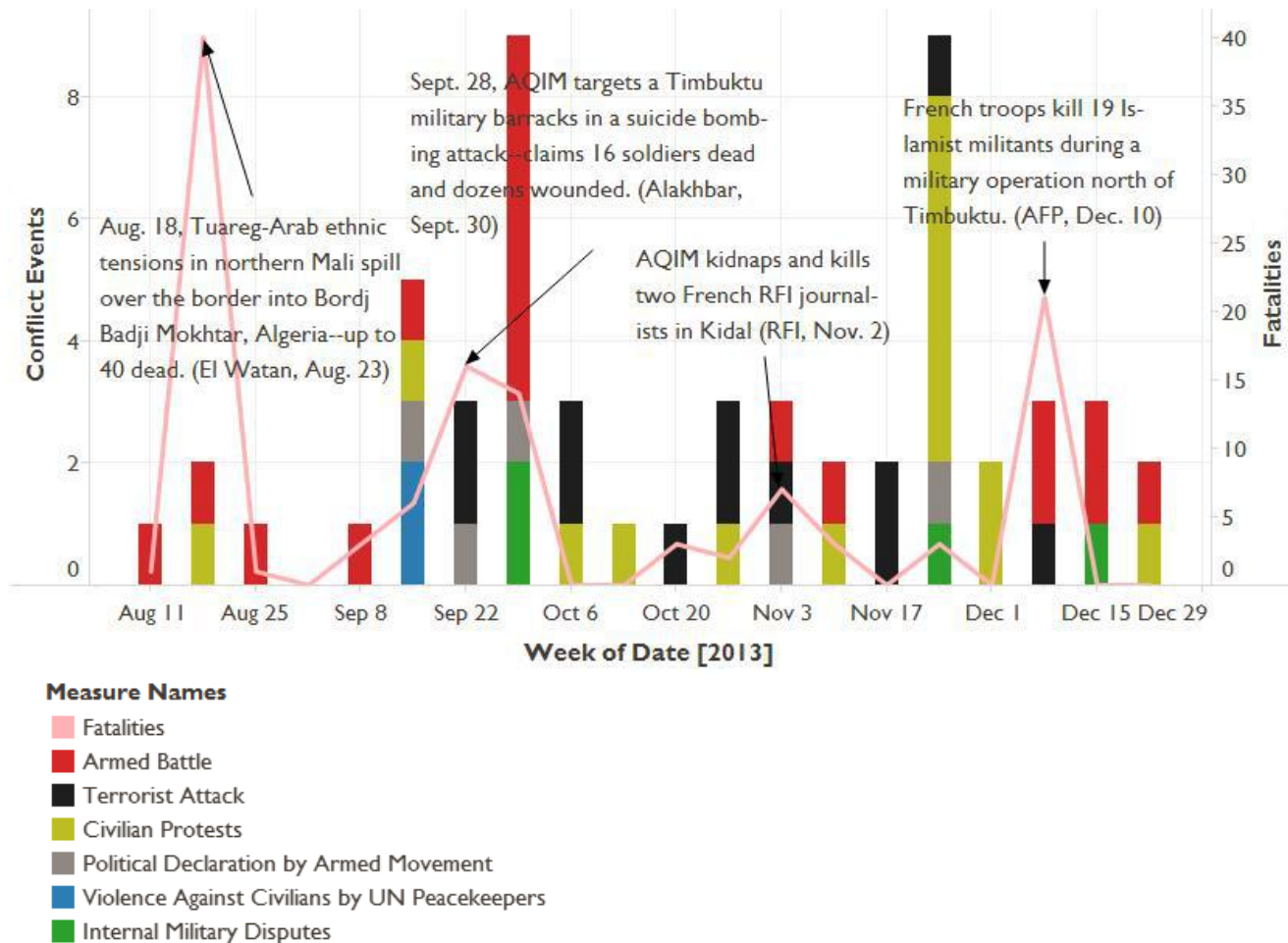
Figure 5 maps major reported conflict events in Mali since the concession of the loser of the presidential election on August 12, 2013 until December 29, 2013.

**Figure 5. Conflict Events Map, August 12 to December 29, 2013**



Moreover, these conflict events have gotten no less lethal. The data also shows a trend in increased terrorist attacks (perpetrated by either AQIM or MUJAO) in recent months. Figure 6 illustrates the frequency of conflict events and fatalities between the same time period.

**Figure 6. Conflict Events Timeline, August 12 to December 29, 2013**



Sources: Armed Conflict Location and Event Dataset; Media Reports

## MILITARY VIOLENCE IN BAMAKO

While there is little threat inside Bamako from terrorist attacks, rivalries between branches of the armed forces and violence against civilians have shown few signs of subsiding.

On August 14, shortly before President Ibrahim Boubacar Keïta took office, the outgoing interim government appointed coup leader Captain Amadou Haya Sanogo to the grade of four star General of the Army. Several human rights groups and Malian political parties condemned the promotion.<sup>31</sup> The interim government also promoted another junta member, Moussa Sinko Coulibaly, to the rank of General. Coulibaly was appointed by Sanogo as his cabinet director in March 2012. In April 2012, the interim government named him Minister of Territorial Administration, a post he continues to occupy today.

In response to these nominations, around 30 armed soldiers stormed the office of Sanogo's new cabinet director in Kati and kidnapped him in September. The cabinet director was lightly wounded by gunshot in the

process. The soldiers who kidnapped him all were close to the military junta before Sanogo's promotion. A defense official told Agence France-Presse (AFP), "the soldiers who worked with the military junta are unhappy because they have been left behind. Some of them were on the front line but they have not been promoted and they are angry."<sup>32</sup> These soldiers were allegedly led by Captain Amadou Konaré, the former right hand man of Sanogo and spokesperson for the military junta. Allegedly, he was angry for not being included among the recent promotions.



Recently Appointed General Sanogo (Reuters)

This episode highlighted the continuing internal divisions within the Malian army. It also marked an embarrassing moment for the new president, Ibrahim Boubacar Keïta, who had pledged to restore order and dignity to Mali. Subsequently, the Minister of Defense launched a new initiative, known as Operation Saniya (which means "cleaning" in the local language Bambara), to disarm the mutinous soldiers and ensure civilian control of the army. Beginning in October, several members accused of participating or sympathizing with the September mutiny mysteriously disappeared or were found dead. After the bodies of four soldiers were discovered and several others were unaccounted for, Amnesty International concluded that "Mali's military appear to be carrying out a purge and extrajudicial killings" directed against soldiers that took part in the mutiny.<sup>33</sup>

On November 27, after Sanogo ignored several judicial requests for questioning, an arrest warrant was issued. 25 armed men arrested Sanogo at his home in Bamako. The Justice Department charged him with "murder and assassination and complicity in murder and assassination" for his role in the disappearances of another military faction, the Red Berets, who attempted to stage a counter-coup shortly after Sanogo took power in March 2012.<sup>34</sup>

Several days later, the Minister of Justice and the prosecuting attorney announced the discovery of a mass grave containing 21 bodies not far from a small town just outside the Kati military barracks. The prosecuting attorney told Reuters that early evidence indicates that the bodies are those of the Red Berets who opposed Sanogo's coup.<sup>35</sup>

Following Sanogo's arrest, the town of Kati has seen a series of demonstrations demanding his release. On December 3, local media reported that pro-Sanogo militants also set a public market on fire in Kati.<sup>36</sup> Moreover, Sanogo supporters have attempted to influence the judicial process. The son of the judge investigating Sanogo's case was attacked and his motorbike stolen by a group of young men on November 26.<sup>37</sup>

Overall, these events have posed little direct threat to civilians, expatriates, businesses, and NGOs in Bamako; daily life has continued as normal. According to the safety and security director of an international development organization, "Bamako is secure. As far as terrorism, the possibility of an attack is low and the impact would be minimal. We've noticed a slight increase in petty crime and incidents of mob justice, but this isn't a major source of concern."<sup>38</sup> Ultimately, however, one of the most immediate sources of concern for

public unrest will be the fallout from Sanogo's trial. Regardless of the result, protests are likely: either supporters demanding his release or opponents pushing for his conviction. Demonstrations and political violence can create an uncertain and volatile operating environment and should continue to be monitored.



Graves and Shrines Destroyed by AQIM at Cimitière des Trois Saintes, Timbuktu (C4ADS)

continued ability to mount terrorist attacks illustrate the danger of working in its rural zones.

## PERSISTENT PRESENCE OF AQIM IN TIMBUKTU

From April 1, 2012 until January 28, 2013, Timbuktu was governed by an alliance between the ethnic Tuareg Islamist group Ansar Dine and al-Qaida in the Islamic Maghreb (AQIM). After French and Malian forces reclaimed the city, many of the jihadists blended in with the local population or dispersed to the surrounding desert villages. Outside the city of Timbuktu and a handful of other large towns, there is no permanent military presence securing the region. AQIM's long-standing presence in the region and

Jihadists continue to be of significant concern in the desert zones north and east of Timbuktu. These areas are sparsely populated and small armed groups can roam undetected in the vast territory. Beginning in the mid-2000s, AQIM capitalized on these opportunities and began to forge close bonds with local communities. Intervening French forces have repeatedly targeted AQIM cells in the vast desert north of Timbuktu. On October 11, Colonel Gilles Jaron, spokesperson for the French army, confirmed that 10 jihadists were “neutralized” 120 kilometers directly north of Timbuktu.<sup>39</sup> In early December, French forces killed an additional 19 militant extremists north of the city.<sup>40</sup>

Many humanitarian actors find banditry and unexploded ordnance to be the largest obstacles to the delivery of humanitarian aid in rural zones, even more so than the terrorist threat. Diadié Maïga, President of the Comité de Crise, told C4ADS, “security is not guaranteed in the region. The government and military are doing what they can, but the region is too vast. The biggest problem is that the population cannot move freely because of fear of banditry.”<sup>41</sup> According to Mamadou Sow, head of the Timbuktu delegation for the ICRC, most of these attacks are opportunistic and not necessarily planned. As such, many international NGOs are reluctant to send their own 4-wheel drive vehicles—a precious asset in the harsh climate and a frequent target of bandits—into these insecure zones.

Highlighting the continued banditry and insecurity in these zones, unidentified armed men travelling in multiple vehicles burst into several voting stations within the rural communes of Aldjounab, Bajakry, Goundam, Léré, and Takouba and stole ballot boxes and other electoral materials during the first round of legislative elections on November 24.<sup>42,43,44</sup>

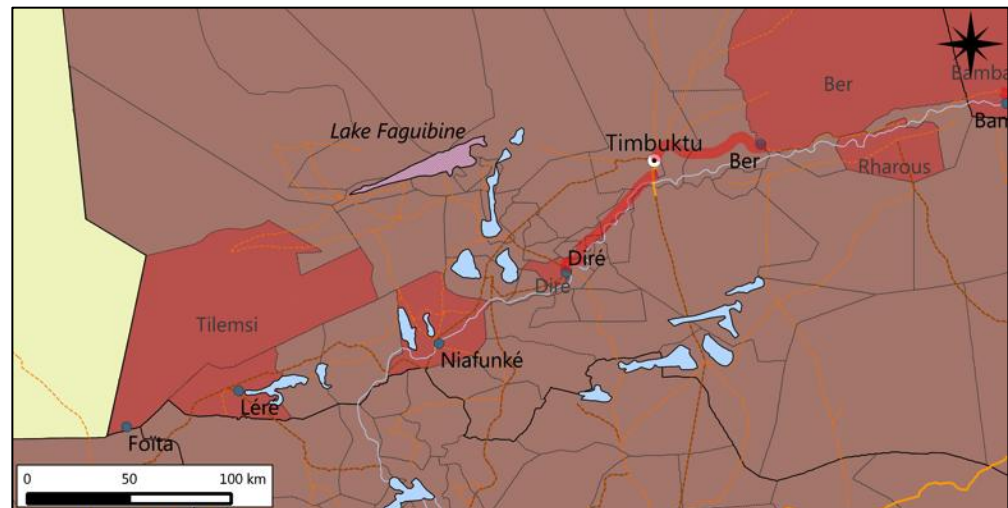
The map below illustrates the zones and routes cited by international organizations in Timbuktu as the most dangerous or insecure due to threats of banditry, unexploded ordnance, or terrorism during C4ADS field research.



UXO Warning Poster, Timbuktu (C4ADS)

**Figure 7. Dangerous Areas in Timbuktu****Legend**

- Dangerous Route
- Dangerous Zone
- Regional Capital
- Settlement
- Water Body
- Paved Road
- Gravel Road
- Earth Road



Sources: Interviews with ICRC, Handicap International, and Plan International (Timbuktu); Africa Infrastructure Knowledge Program; WFP Logistics Cluster

The city of Timbuktu is made up of eight administrative districts, called quartiers. The four older quartiers of Badjindé, Djingareïber, Sankoré, and Sareïkeïna form the core urban zone. The remaining four quartiers are relatively recent or are located on the periphery of the city: Abaradjou, Bellafarandi, Kabara-Fondo, and Quartier Administratif.

Of Timbuktu's eight quartiers, Abaradjou is by far the most dangerous. As the northernmost quartier of the town, it lies on the edge of the Sahara desert and it is not recommended that foreigners spend time there. The only road leading from it heads to the desert outpost of Taoudenni in far northeastern Mali, a region also known as an AQIM sanctuary and smuggling route. Locally, it is called the Arab quartier and, according to residents, is where the last two terrorist attacks on the city were planned.<sup>45</sup> It was also from this quartier that three tourists were kidnapped, and a fourth killed, in 2011 by AQIM.<sup>46</sup> The quartier also hosts the impressive Flamme de la Paix monument, erected in 1996 in commemoration of the ceremonial burning of 3,000 weapons to honor of the end of the second Tuareg rebellion.



MINUSMA Peacekeeping Forces, Timbuktu (C4ADS)

On September 28, two suicide car bombers attacked a military camp on the outskirts of Timbuktu. The initial reports cited four casualties. However, two days later in a statement released to the Mauritanian news service Alakhbar, the AQIM katiba Imaratou Sahara claimed 16 Malian soldier casualties.<sup>47</sup>

As a result of this precarious situation, security measures have been heightened in the city. There are checkpoints at all entrances manned by Malian, MINUSMA, and French forces where vehicles and passengers are subject to inspection. At 18:00 each night, the entrances to the city are closed and no one is allowed to enter or leave. Residents recommend stopping business activities at 16:00 daily.



Palais de Justice—Destroyed After MUJAO-French Battle, Gao (C4ADS)

## PROTRACTED MUJAO THREAT AND CIVIL UNREST IN GAO

Gao is the most populated city in northern Mali, was the first northern city liberated after French intervention, and has experienced the most civil unrest since. While the population largely rejected the imposition of sharia law by the Islamist group the Movement for Oneness and Jihad in West Africa (MUJAO), it has also not enthusiastically welcomed the return of the Malian administration and local police.

MUJAO has continued to commit terrorist attacks against civilians, armed forces, and infrastructure networks in the city and the region. The city of Gao and the town of Ménaka have been the primary targets. On October 8, Islamists from MUJAO blew up a strategic bridge close to the border with Niger, which is the primary route between Niamey (the capital of Niger) and the city of Gao. On November 21, days before the first round of legislative elections, several rockets landed on the outskirts of the city of Gao and were fired from only a dozen kilometers away, indicating that terrorists have sanctuary in nearby villages.<sup>48</sup> On December 1, a suicide bomber targeted French and MINUSMA forces in Ménaka.<sup>49</sup>

In recent months, there have been a series of youth demonstrations in Gao protesting continued insecurity, lack of economic opportunity, lack of infrastructure, corruption among local police and gendarmes, and poor management of the city by local officials.

On October 9 and 10, a sit-in was staged at the large town square, Place de l'Indépendance, to demand the resignation of the governor and several other officials due to poor management of the current crisis. These protests increasingly include social issues as well. Common grievances include the lack of electricity, education, and jobs.

On November 1, protestors turned to more drastic measures and burned government buildings in the city. Targets included the governor's office and the house of the mayor, Sadou Harouna Diallo. The protesters clashed with police in the streets. The former were armed with rocks and the latter with tear gas.<sup>50</sup>

These demonstrations often are led and encouraged by the youth movements Jeune Patrouille (Youth Patrol), Jeunes Patriotes (Young Patriots), and Nous Pas Bouger (We Won't Move). These civil society organizations were founded in the aftermath of the fall of Gao in an effort to resist the occupiers and protect the population. "After April 2012, we really understood what anarchy meant... Gao became a place without law," Moussa Boureima Yoro, Coordinator of Jeune Patriouille, told C4ADS.<sup>51</sup> In this vacuum, his organization conducted security patrols in each of the city's nine quartiers during the 10-month occupation. "We provided

the military with intelligence information on the jihadists and they know our contributions during the occupation. After the liberation, we showed Serval and the Malian military MUJAO's weapons stockpiles. Now, we need something from the government to recognize our efforts and put our members in good conditions." Yoro's sizeable volunteer force is now manning checkpoints with Malian forces and participating in reconstruction projects funded by the French, but he wants more tangible benefits. According to Yoro, "All I need to do is make an announcement on the radio and my followers will march in massive numbers."

Now that the government of Mali has returned, these youth movements are primarily concerned with the security of the population and ensuring that their movements are recognized for their contributions—this usually manifests as demands for incorporation of their members into the security forces or the government apparatus. Hamaya Ag Abdoulaye, the spokesperson for Nous Pas Bouger, said to C4ADS, "We need to be implicated in all acts of reconciliation. We are the only ones who can truly represent the population and speak about the occupiers, because we lived with them."<sup>52</sup>



Nous Pas Bouger Protester, Gao (Reuters)

Corruption among local police and gendarmes is a common grievance of the local population, who accuse them of soliciting bribes for petty infractions (e.g., not carrying an identification card at all times) and for not doing enough to punish collaborators of MUJAO. Mahamane Alpha, from another youth organization, Mouvement Patriote (Patriot Movement), told AFP during a recent demonstration, "We asked for the departure of the commandant of the gendarmerie and of the police director... because several times we, the population of Gao, have arrested jihadists. We didn't touch them, we took them to the gendarmerie and the police took 'crumbs' [small bribes] and freed them."<sup>53</sup>

Protests also have occurred in other large towns in the region of Gao, including Ménaka and Ansongo.



UXO Warning Poster, Gao (C4ADS)

checkpoints in and out of the city and MINUSMA and Malian patrols within the city are ubiquitous.

Despite civil unrest and terrorist attacks, the security situation in the city of Gao is significantly better than it was in the past. In a joint evaluation mission conducted by the Emergency Telecommunications Cluster and the UN Department of Safety and Security in June 2013, the mission noted that "the city of Gao is more secure than it was one month ago. Populations are returning and trade activities have resumed. Strong presence of Mali's army, along with foreign armies, has helped reduce terrorist action and incursions in the city."<sup>54</sup> As with Timbuktu, the Malian army, MINUSMA, and French forces operate

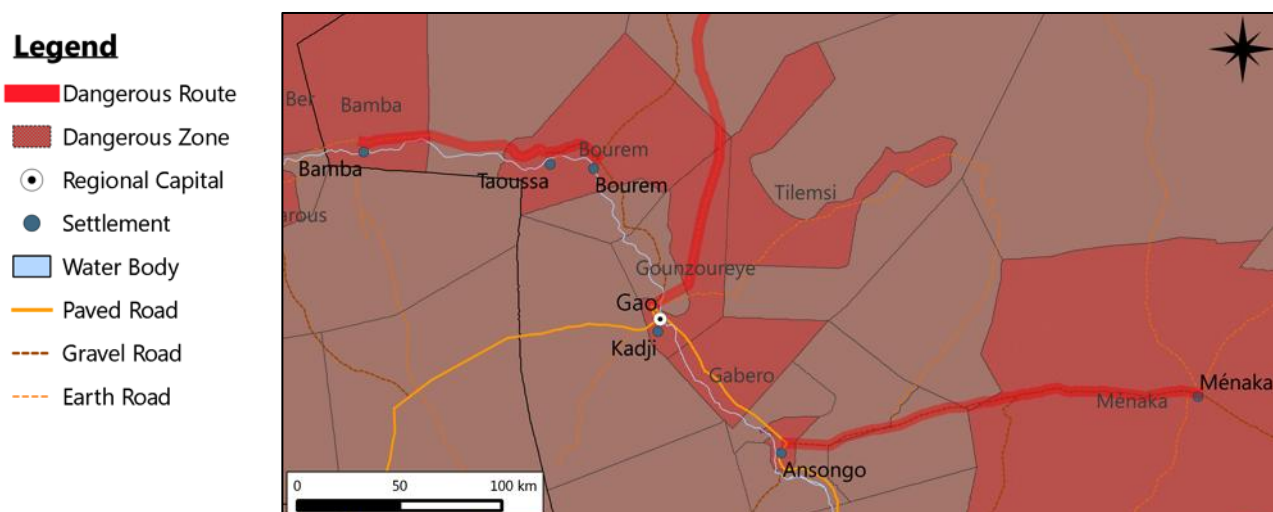
Moreover, international NGOs have returned. Among many others, Oxfam, Médecins du Monde, Action Against Hunger, Save the Children, and the ICRC have resumed relief activities in the city and the region.

The city itself is relatively safe and secure: markets are busy, restaurants and bars are full, and the large UN presence has reinvigorated the local economy. However, working in the rural areas still presents significant challenges. Abdoussalam Tiemogo Maïga, field chief for Save the Children in Gao, said, “the city of Gao is secure, there is really no risk here. The real risks start when you get a few kilometers outside of the city.”<sup>55</sup> In particular, Wahhabi villages that proved to be fertile MUJAO recruiting grounds and openly embraced its occupation are seen as a danger. Most notably among these are the island village of Kadji and several villages within the rural commune of Gabero, all of which lie within 35 kilometers of Gao.

There is frequent banditry within the nomadic zones and along primary transportation routes. Interview respondents most frequently cited the Gao-Kidal, Ansongo-Ménaka, and Bourem-Bamba routes as the most difficult. The ICRC reported having one of its vehicles stolen and two looted along the Ansonge-Ménaka route. There are also concerns of unexploded ordnance, but, fortunately, no humanitarian organization has been victim yet.

Figure 8 below illustrates the routes and zones most often cited as the most dangerous during field research conducted by C4ADS.

**Figure 8. Dangerous Areas in Gao**



Sources: Interviews with ICRC, Malitel, Orange, Oxfam, and Save the Children (Gao); Africa Infrastructure Knowledge Program; WFP Logistics Cluster

## THE KIDAL QUAGMIRE

The region of Kidal, riddled with conflict and instability, poses the most direct threat to organizations operating in northern Mali. Since the August presidential election, Kidal has suffered from an ambiguous governance situation. A tenuous alliance between Tuareg rebel movements, Malian armed forces, MINUSMA peacekeeping troops, and Serval forces has failed to create clear lines of authority or provide basic security, leading to numerous terrorist attacks, civilian protests, and kidnappings. No single entity has full authority within the city or region and security conditions are too volatile to allow for the return of most humanitarian actors. As of November 26, Kidal still was a “no-go” for UN staff.<sup>56</sup> The safety and security director of a large international development organization told C4ADS, “Kidal is completely off limits for the humanitarian and development community.”<sup>57</sup>

After an agreement between the Malian government and the two principal Tuareg rebel groups in Kidal—the MNLA and the HCUA (High Council for the Unity of Azawad)—in June 2013, a ceasefire was established. In the agreement, all parties agreed to place the city of Kidal under joint control by French, MNLA, HCUA, Malian, and MINUSMA forces. This strategy has not been successful. Abdoulaye Bathily, MINUSMA’s second-in-command, told France 24, “The truth is that in Kidal now there is no rule of law. Armed groups have not disarmed, despite a UN resolution requiring them to.”<sup>58</sup>

The power sharing arrangement between the groups, specifically the MNLA and the Malian armed forces, is incredibly tense and has erupted into armed confrontation on several occasions.<sup>59,60</sup> Each of these clashes has followed an attempt by the MNLA to reinforce its position with additional troops in the city of Kidal.

Terrorist attacks continue to threaten civilians and armed forces alike. Targets have included the Banque Malienne de Solidarité branch in Kidal, a former World Food Programme storage facility, military checkpoints, and French army vehicles.<sup>61, 62, 63</sup>



Kidal Marker (AFP)

On December 14, on the eve of the second round of legislative elections, another suicide attack on the local bank killed two Senegalese MINUSMA peacekeepers. Malian MUJAO leader Sultan Ould Bady claimed responsibility.<sup>64</sup> A ditch has been dug around the perimeter of the town to prevent terrorists from speeding in or out of the city.

Civil unrest and protests also are widespread. The handover of the state-owned media office (ORTM) and the governor’s office to the Malian administration

sparked anti-government demonstrations on November 13 and 14. Protestors set fire to the governor’s office and ransacked the public treasury and a nearby state education facility. In early December 2013, ORTM resumed television and radio broadcasting after almost two years of suspended activity.

On September 15, shortly after assuming office, President Keïta sent a delegation of ministers (including Minister of Territorial Administration General Coulibaly, Minister of Interior Security Colonel Sada Samaké, and Minister of Reconciliation and Dialogue Cheick Oumar Diarra) to Kidal by plane. The ministers were greeted at the runway by a crowd of angry pro-MNLA protestors who pelted the official convoy with rocks and broke one of the vehicle’s windows.<sup>65</sup>

A similar incident occurred two months later on the next planned official visit by a high-ranking government official. On November 28, Prime Minister Oumar Tatam Ly was scheduled to arrive in Kidal after having visited Timbuktu and Gao. However, his plane was unable to land due to pro-MNLA protestors again blocking the runway. The demonstration grew violent as protestors began to throw rocks at the Malian armed forces, who responded by firing gunshots;<sup>66</sup> several demonstrators were wounded.

The last incident incited incendiary comments from both the government and the MNLA, with MNLA Vice-President Mahamadou Djéri Maïga calling it a declaration of war and renouncing the cease fire. However, another official of the MNLA, Ambeiry Ag Rhissa, attempted to qualify Maïga’s remarks and told RFI, “I think he is right to be angry but I think he went too far in his declaration. It’s not necessary to take it seriously.”<sup>67</sup>

One incident particularly highlights the constant danger for any Westerners in the vicinity of Kidal. On November 2, AQIM-linked militants abducted two RFI journalists, just after they finished interviewing an MNLA official. In what appeared to be a botched kidnapping-for-ransom attempt, the journalists were killed shortly after their abduction and left on the outskirts of the city. It was an incredibly bold act, conducted in broad daylight and under the noses of French, Malian, and MINUSMA forces.



MNLA Flag, Kidal (AFP)

Both Tuareg rebel groups and the Malian government blame France for the poor management of Kidal and for not doing enough to resolve the political crisis. On December 4, President Keita threateningly told *Le Monde*, “The international community is forcing us to negotiate on our soil with people who took up arms against the state. I remind you that we are an independent country.”<sup>68</sup>

The continued French military presence means full-scale conflict is unlikely to resume in Kidal in the near future, but the tenuous security situation also shows no signs of improving. As such, the ICRC, Médecins du Monde, and Médecins sans Frontières are the only humanitarian organizations that continue to implement relief efforts in the region, albeit on a more limited scale than in the relatively secure regions of Timbuktu and Gao.

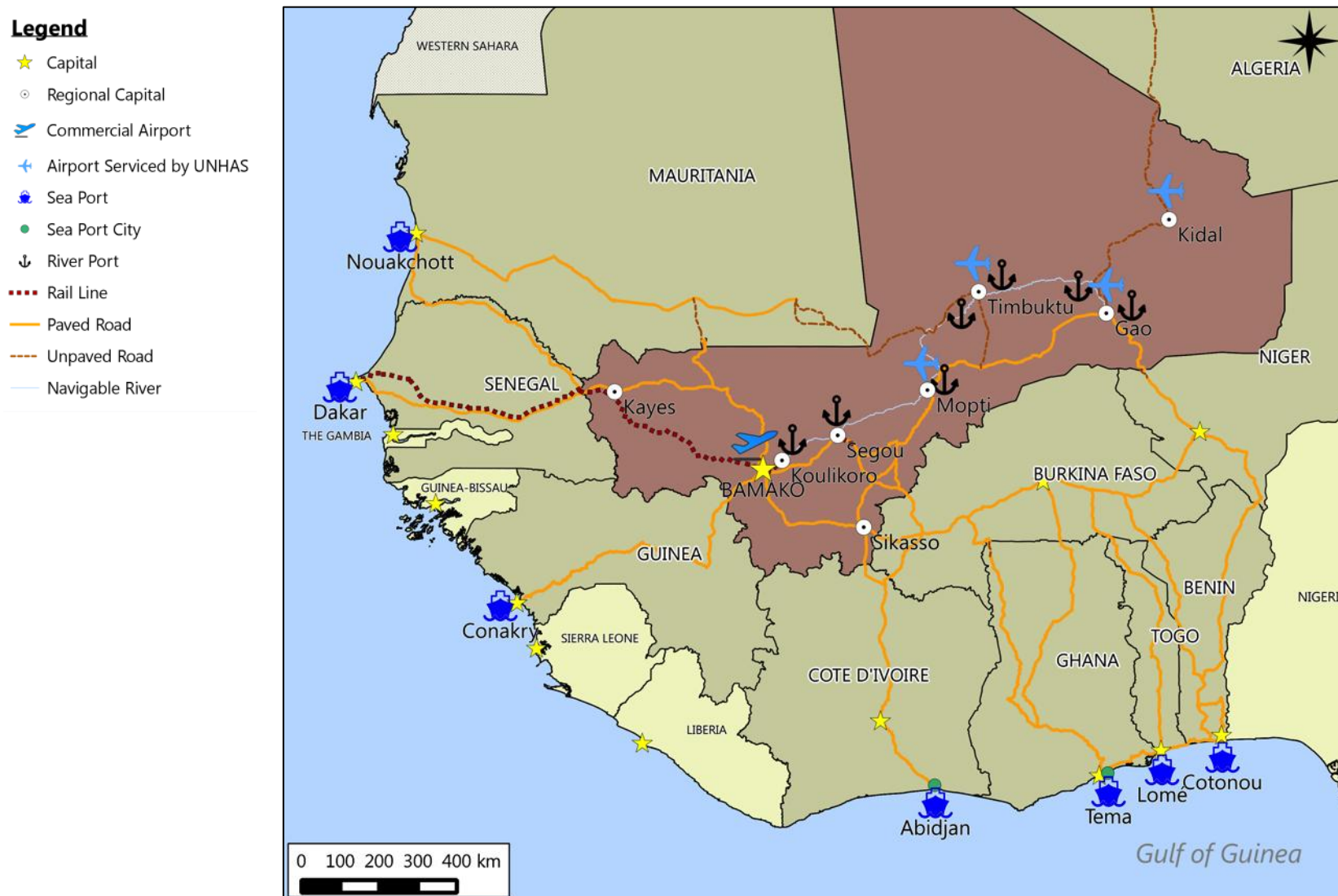
## V. Transportation

### ROUTES

A poor and unreliable transportation network represents a significant obstacle to operations for any organization in Mali. The most recent report of a regularly updated study of transportation networks and road governance in WAEMU conducted by Borderless and the United States Agency for International Development notes that Mali “remains the worst country for the movement of vehicles and goods.”<sup>69</sup> Checkpoints are frequent, bribes are common for commercial vehicles (typically between \$3 and \$6 per 100 kilometers), and travel times are long.

Figure 9 below identifies the primary international routes to Mali. Figure 10 illustrates all domestic corridors and highlights the relatively robust infrastructure network in the southern parts of the country when compared to the less accessible northern parts.

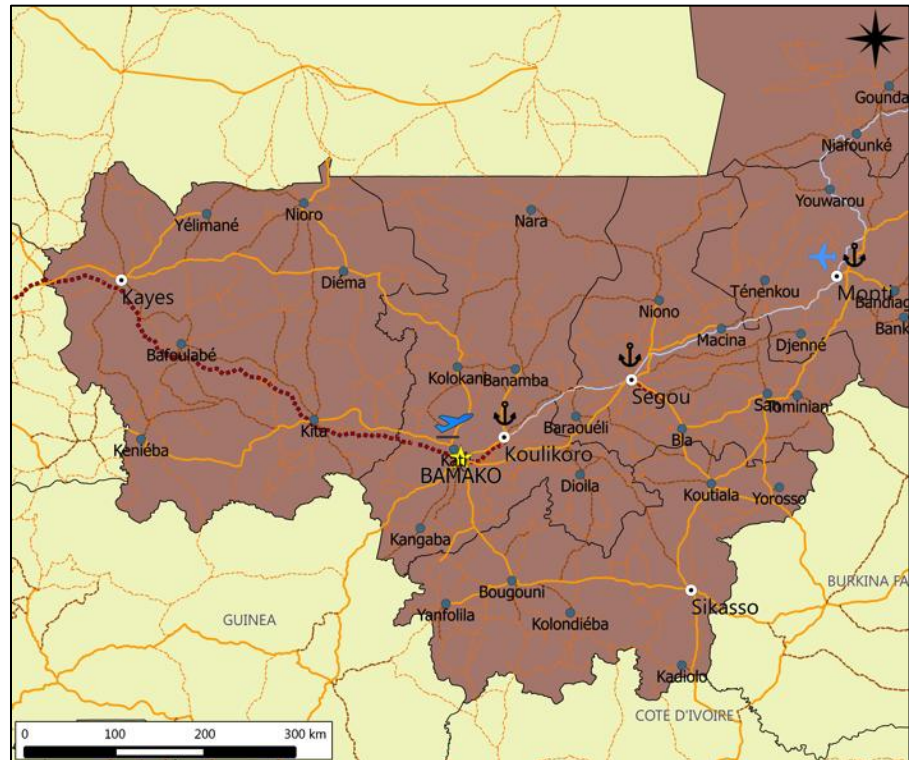
Figure 9. Primary International Corridors to Mali



**Figure 10. Primary Domestic Corridors**  
South

**Legend**

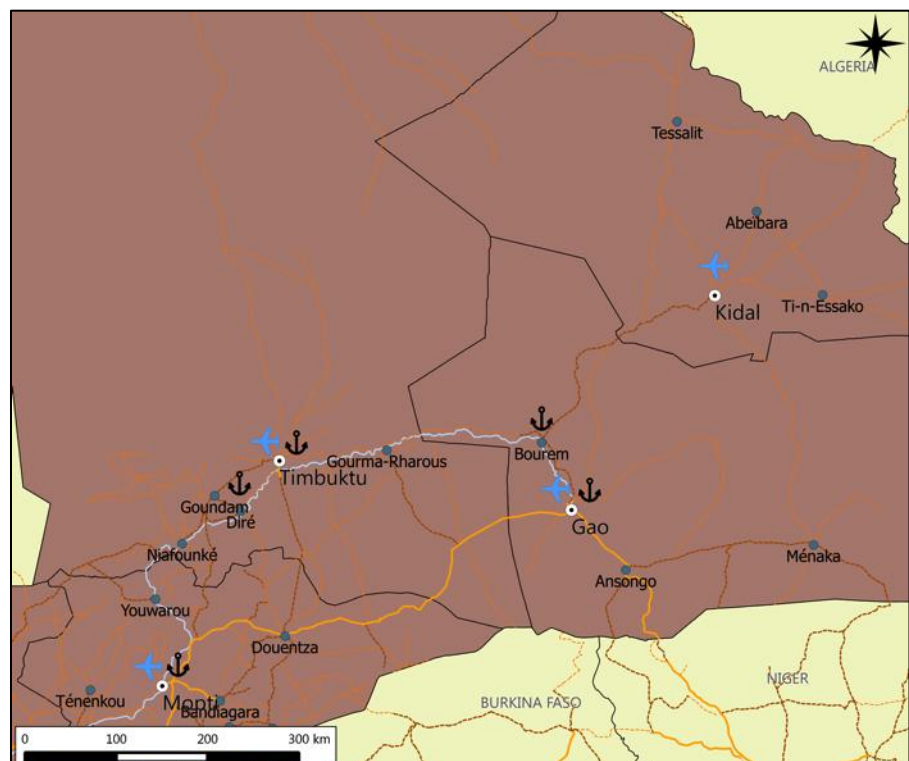
- ★ Capital
- ⊙ Regional Capital
- Cercle Capital
- ✈ Commercial Airport
- ✈ Airport Served by UNHAS
- ⚓ River Port
- Rail Line
- Paved Road
- Gravel Road
- Earth Road
- Navigable River



**North**

**Legend**

- ★ Capital
- ⊙ Regional Capital
- Cercle Capital
- ✈ Commercial Airport
- ✈ Airport Served by UNHAS
- ⚓ River Port
- Rail Line
- Paved Road
- Gravel Road
- Earth Road
- Navigable River



Sources: Africa Infrastructure Knowledge Program; WFP Logistics Cluster; UNHAS

In order to promote local economic growth, but also due to high import costs and unreliable transportation, most international NGOs prefer to buy supplies locally. When an NGO is forced to import materials, the usual transportation method is by road. Transportation times vary, but usually take one to two months, depending on location.

The primary route for imported goods shipped to Bamako is via the sea port of a neighboring country. Goods are then transported via road, which for the most part are paved but of poor quality. However, the port of Dakar in Senegal also has a rail line linking the two capitals that is used for shipping commercial goods.

Shipping materials to northern Mali is quite challenging. There are few large transportation companies with a national network and road conditions are incredibly poor. If an organization is recognized by the UN Office for the Coordination of Humanitarian Affairs (OCHA) as a humanitarian actor, the United Nations Humanitarian Air Service (UNHAS) is the most efficient method for small cargo. MINUSMA also provides air transport under certain circumstances.<sup>70</sup>

In Timbuktu, most supplies come via road from either Bamako, Mopti, or Gao. UN agencies and the ICRC have large distribution facilities in Mopti, which are used as a logistics hub to service all of northern Mali.

In Gao, many supplies are imported from Niamey and most fuel comes from Algeria because it is cheaper, but generally of poorer quality. In addition, large amounts of food (grains, produce, and vegetables) are delivered to Gao via river transportation, which links the city to agricultural regions in southern Mali.

Kidal represents a unique challenge. Due to its isolation and the small presence of humanitarian workers, almost all relief aid is bought locally through Kidal-area businessmen.<sup>71</sup> The ICRC reports that most of these materials come from Algeria, and pass through the cities of Tamanrasset, Algeria and Tinzouatène, Mali. Exacerbating supply issues, Algerian authorities closed the Algeria-Mali border shortly after the beginning of the conflict and have yet to reopen it on a permanent basis, though exceptions are sometimes made for the transport of relief supplies.<sup>72</sup>

Recent instability in the North has not stymied the smuggling of goods into and through the region. Border patrols and checkpoints are insufficient. The field chief of an international relief organization in Timbuktu, who asked to remain anonymous, bluntly stated, “I can get a truck full of gas from Libya to Timbuktu without ever passing a single checkpoint.”<sup>73</sup>

While bribes are common along ground routes, no NGO reported to C4ADS of paying a bribe when shipping materials by air. However, this method of transportation is incredibly expensive and out of reach for most local organizations or businesses. Bribes are also less of a problem for those international organizations officially registered with the government and who have signed an Accord-Cadre, which exempts the organization from most tariffs and customs duties.

## SEAPORTS

Mali is accessible from several seaports, but the port of Dakar is the most used for two reasons: its superior port facilities and the decline in preference for the port of Abidjan during the Côte d’Ivoire crises from 2002 to 2007 and from 2010 to 2011. In terms of imports, 1.3 million tons of cargo was shipped to Mali via the port of Dakar in 2012.<sup>74</sup> In addition to Dakar and Abidjan, the other seaports most commonly used are

Tema, Cotonou, and Lomé. While the Bamako-Conakry corridor is the shortest, the port of Conakry is infrequently used due to its poor port facilities.

Table 1 describes various seaports servicing Mali.

**Table 1. Ports to Mali**

Port	Country	Distance to Bamako	Quality of Port Infrastructure <i>Scale of 1 (low) to 7 (high)</i>	Approximate Transit Time
Abidjan	Côte d'Ivoire	1,150km	4.6	15.5 hours
Conakry	Guinea	911km	3.5	13 hours
Cotonou	Benin	1,867km	3.7	25 hours
Dakar	Senegal	1,342km	4.5	18 hours
Lomé	Togo	1,785km	<i>Unavailable</i>	23.5 hours
Nouakchott	Mauritania	1,451km	3.7	20 hours
Tema	Ghana	1600km	4	21 hours

Sources: WFP Logistics Cluster; The World Bank DataBank (2012)

## ROADS

Roads in Mali are poorly maintained and only 13 percent of the total road network is paved.<sup>75</sup> Many major localities, including the regional capitals of Timbuktu and Kidal, are only accessible via unpaved gravel or earth roads.

All petroleum products in Mali are imported. Before 2002, 70 percent of petroleum imports came via Côte d'Ivoire. Since then, Mali has diversified its sources to include Algeria, Benin, Ghana, Senegal, and Togo.<sup>76</sup>

The lack of domestic petroleum sources and local refineries, long transport times and distances, and continued instability in the North results in high fuel costs. This also raises the costs of importing and exporting. The logistics coordinator of the ICRC in Mali observed, “When jihadists were in Gao, transportation costs were 80 percent higher and we had to hire guards for shipments.”<sup>77</sup> Costs have decreased slightly since French intervention, but fluctuate according to the level of conflict activity in the area.

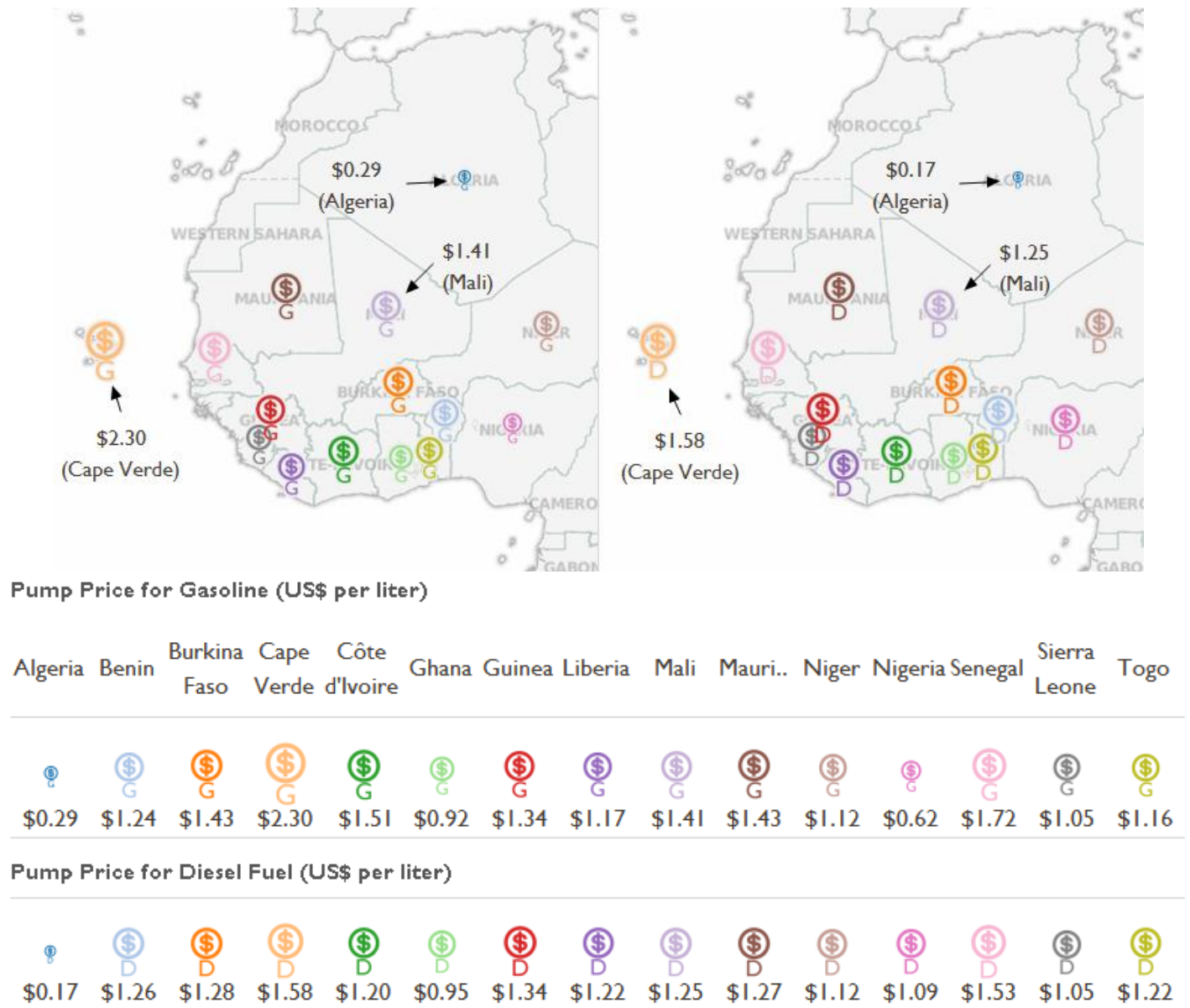
**Table 2. Road Network**

	Kilometers of Road	Percent (%) of Total
<b>Total Road Network</b>	34072.26	-
<b>Asphalt</b>	4545.32	13.34
<b>Earth</b>	22162.74	65.04
<b>Gravel</b>	7364.19	21.61

Source: African Development Bank Group

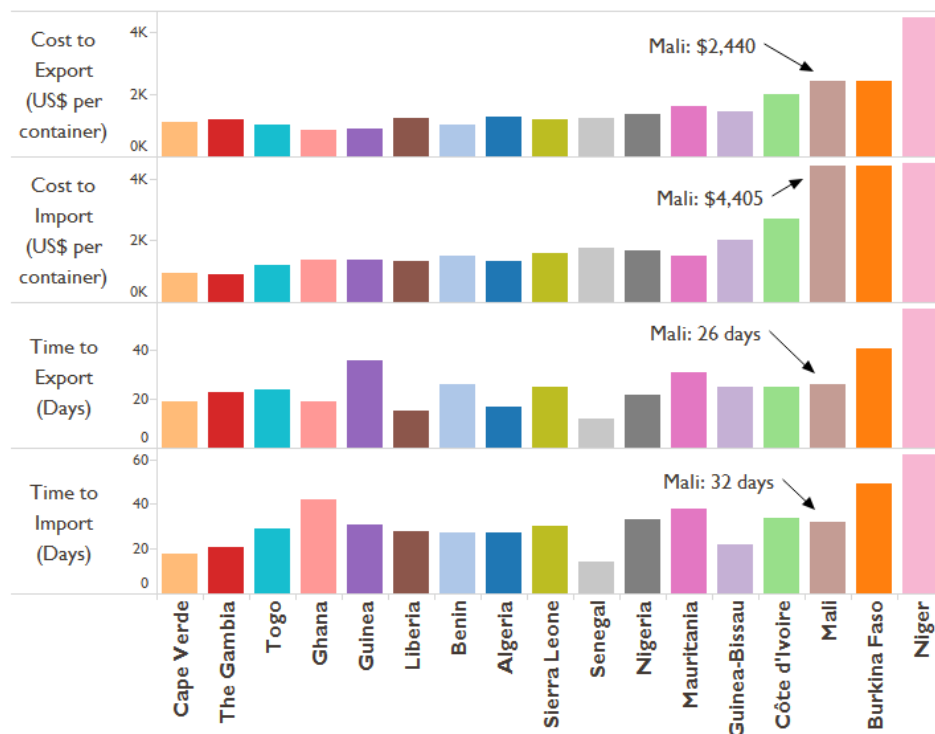
Figures 11 and 12 below demonstrate the relatively high costs of transport in Mali when compared with the rest of the region.

Figure 11. Mali's Fuel Costs Are Above Average in the Region



Source: The World Bank DataBank (2012)

**Figure 12. Import-Export Costs and Times Are Among the Highest in the Region**



Source: Doing Business 2014

The high import costs also contribute to the high costs for renting vehicles in the country. The most common types available for rental are 4-wheel drive vehicles. However, the preferred vehicle of choice for international organizations, government officials, bandits, smugglers, and terrorists alike is the Toyota Landcruiser, which is well equipped for the rough terrain. While there are some car rental companies, such as CFAO Motors, they do not have offices outside of Bamako and prices usually fall between \$150 and \$200 per day. Some small companies or private owners charge lower prices (approximately \$90 per day).

Due to threats of banditry and unexploded ordnance in the North, most international organizations operating there prefer to not use their own vehicles when conducting missions in the field. Thus, many tour guides and businessmen who formerly catered to Timbuktu and Gao tourists now rent their 4x4s to international organizations at high prices. The demand for these vehicles is so high that international organizations in both Timbuktu and Gao have complained of insufficient supply.

When renting vehicles in the regions of Timbuktu, Gao, and Kidal, it is especially important to hire drivers who are experienced with the terrain and have desert driving skills. Many roads are not paved and storms may obscure the path.

## AIR

Bamako-Senou is the only airport in Mali serviced by commercial airlines. However, there are smaller airports in every regional capital and several large towns. French travel company Point-Afrique was the only international operator to arrange flights to Gao, but discontinued operations in 2010 due to security concerns. A representative from Point-Afrique informed C4ADS that flights will resume as soon as security conditions permit.<sup>78</sup> Oumar Doucouré, an operations coordinator at the airport of Timbuktu, does not believe any commercial carriers will service the North in the near future.<sup>79</sup>

Charter flight services are available from Sahel Aviation Services and MAC Air, but costs are high. In July 2013, MAC Air quoted a round trip flight from Bamako to Gao at \$15,615.



LET L-410 leased by UNHAS, Mopti (C4ADS)



République de l'Azawad and Bullet Holes, Airport, Gao (C4ADS)

The runway is 2200 meters long and can accommodate a Boeing 737. The airport of Gao is in much worse condition. The MNLA pillaged and vandalized its terminal in 2012, and it has not yet been restored. The airport of Kidal is little more than a dirt airstrip.

Strong sandstorms represent another obstacle to aviation in the north.

Shipping materials to Bamako via air is expensive. Many smaller, financially-strapped NGOs reported to C4ADS that it is easier and cheaper to pack supplies in passenger luggage on commercial flights rather than ship them via a logistics service. The cost to ship non-liquid items via the international express mail service, DHL, is approximately \$100 per kilogram.

The World Food Programme operates an air service for members of the humanitarian community in Mali (as designated by UN OCHA) called the United Nation's Humanitarian Air Service (UNHAS). Flights via UNHAS are available from Bamako to Mopti, Timbuktu, Gao, and Kidal multiple times per week. UNHAS has two small planes at its disposal: a 19-passenger Beechcraft 1900D and a 19-passenger LET L-410. The maximum luggage allowed per passenger is 20 kilograms. Other than travelling with MINUSMA, Serval, or by chartered flight, this is the only means of air transportation for civilians to these cities.

French military forces secure Timbuktu, Gao, and Kidal airports. The Timbuktu airport terminal and tarmac were renovated in 2002 and are well maintained. According to the airport's operations coordinator, the



Sandstorm during UNHAS Flight to Gao (C4ADS)

## RAIL

There is one rail line in Mali, which links Bamako directly to Dakar. This distance between the two capitals by rail is slightly more than 2000 kilometers. However, only twenty percent of Mali-bound freight is transported via the rail network.<sup>80</sup> The significance of the rail corridor has decreased in recent years. Management missteps and a lack of investment have resulted in a gradually deteriorating rail infrastructure, reducing its capacity and reliability.

Merchandise trains normally leave daily in both directions and take approximately five days to reach their destination. The track is in poor condition and derailments are common. Most available capacity is reserved for major freight forwarders (such as Maersk or SDV), making it difficult for occasional users to access train transport for materials.

## RIVER

River transport is available along the Niger River between the cities of Koulikoro and Gao, a distance of around 1,500 kilometers. There are river ports in Koulikoro, Ségou, Mopti, Diré, Timbuktu, Bourem, and Gao. River transport takes approximately one week from Koulikoro to Gao and two to three days from Mopti to Timbuktu. River transport is primarily used to ship agricultural products from the southern parts of the country to the North, and boats return to the South with Algerian goods loaded from Gao.

River navigability depends on the time of year and the amount of rainfall. The river is typically only navigable by large boats between July and December. Shipping prices via river are competitive with those of road transportation; indicative costs from Mopti to Timbuktu are approximately \$30 per metric ton.

The corridor has one sole operator, the state-owned Compagnie Malienne de Navigation (Malian Navigation Company or COMANAV). The conflict and occupation of northern Mali in 2012 was the first time in over 50 years of continuous activity that COMANAV did not operate. This disruption in service increased inflation in northern Mali and left hundreds of COMANAV employees without work.

As of July 2013, COMANAV resumed operations between Koulikoro and Gao. However, COMANAV's fleet is old and transportation is not safe. On October 11, a COMANAV boat capsized near Konna (approximately 60 kilometers north of Mopti), which killed 68 passengers.<sup>81</sup>

# VI. Communications




## THE MOBILE PHONE EXPLOSION

Thanks to the increasing availability and decreasing costs of mobile phones and mobile infrastructure, virtually every populated location is accessible via cell phone signal. A representative from one of the two commercial mobile providers estimated that 90 percent of the total population is covered by its network. However, service can be unreliable, sometimes cutting out for hours or days at a time.

The two providers of commercial mobile services in Mali are French-owned Orange and Moroccan-owned Malitel. Subscription and usage costs are relatively inexpensive. Both companies also provide internet services. Over 99 percent of mobile subscribers use pre-paid plans and minutes of use per subscriber were last reported at 48 by Orange in December 2010. Orange has dominant but eroding market share of over 60 percent.<sup>82</sup> A third company, Afribone SA, also provides commercial internet services in Bamako.

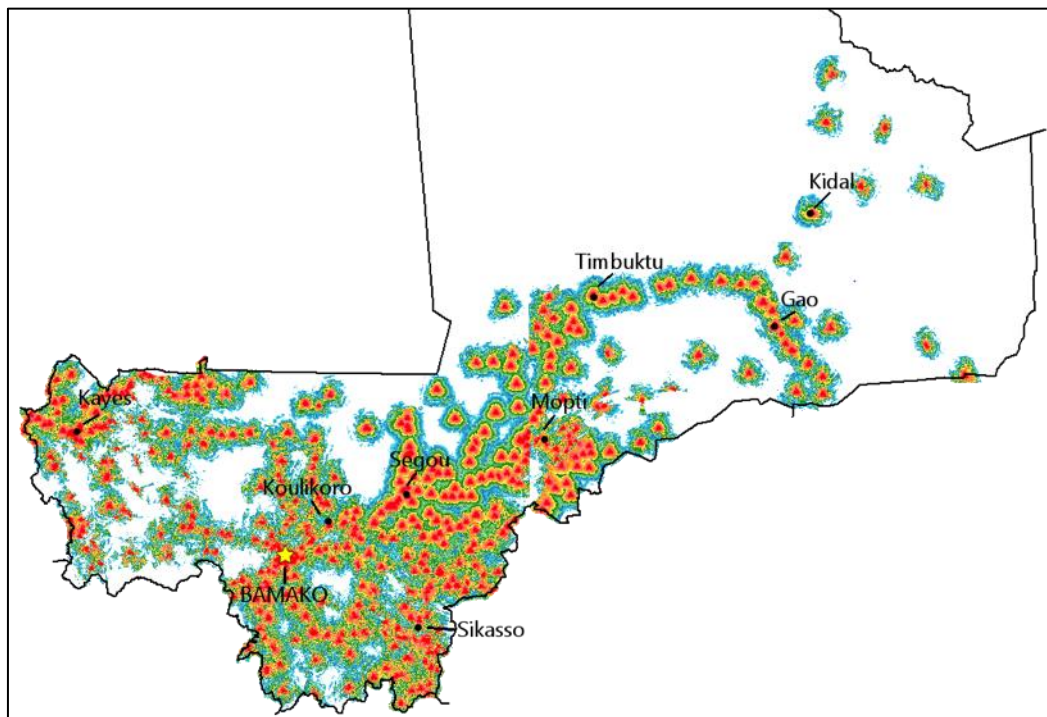
A third mobile license was awarded to Alpha Telecom Mali, a joint-venture between Monaco Telecom and Planor Afrique (a Burkinabé company), in June 2012. Since then, the deal has been marred by controversy over missed payments and government mismanagement. No concrete plans for operation have begun.

**Table 3. Commercial Communications Providers**

	Owner	Voice Costs	SMS Costs	3G Network	Internet Services
	Maroc Télécom (51%) Government of Mali (49%)	90-198 FCFA/minute	10-50 FCFA/message	Yes (limited coverage)	56kb/s-2mb/s (Bamako, Kati, Kayes)
	France Télécom	48-190 FCFA/minute	20-50 FCFA/message	Yes (Bamako and all regional capitals except Kidal)	256kb/s-1mb/s (Bamako, Mopti, Kayes, Sikasso)
	Afribone SA	N/A	N/A	No	256kb/s-512mb/s (Bamako)

Malitel provided C4ADS with a map of its tower locations and coverage network, which is reproduced in Figure 13 below.

**Figure 13. Mobile Coverage Is Extensive**



Source: Malitel Technical Engineering Department

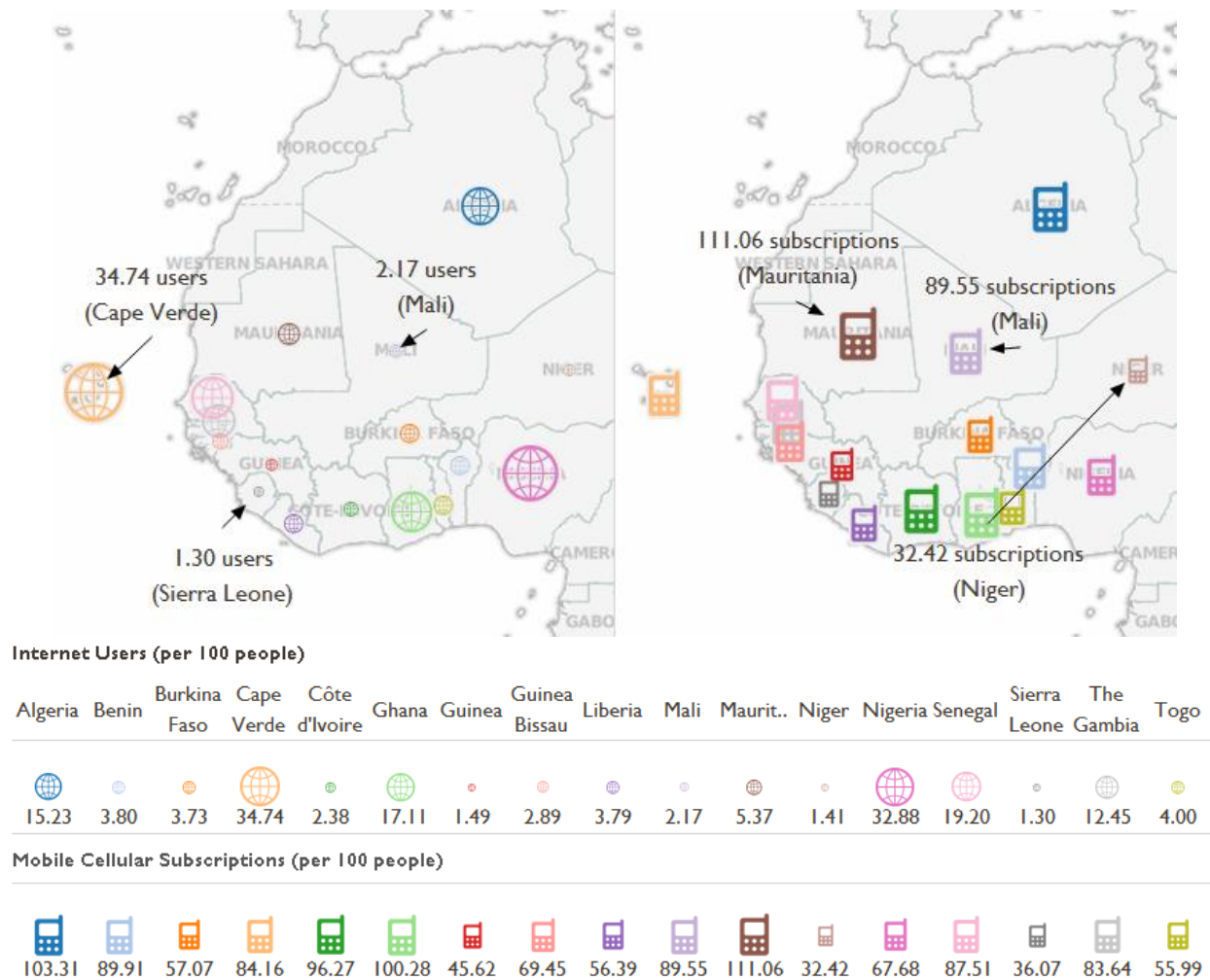
A Malitel engineer noted that the cellular network was damaged during the crisis, but is being repaired. Some of the sites rely solely on electric generators, many of which were stolen or damaged during the crisis. In addition, when the electric grid is down, the network may be interrupted. As French forces moved to retake

the cities of Timbuktu and Gao in early 2013, the Islamist occupiers destroyed the Orange and Malitel towers in an effort to prevent the local population from providing information about their positions. As a result, Malitel lost 60 percent of its network in the north, but now estimates that it has been restored to 80 percent capacity.<sup>83</sup> Orange claims that its network has been 100 percent restored, but estimates that losses resulting from theft and vandalism of its sites were in the billions of CFA.<sup>84</sup>

Internet usage has not increased to nearly the same extent as mobile phone usage. Computer literacy in Mali is low and the high initial cost of a computer is untenable for the majority of Malians. The introduction of ADSL, WiMAX, and mobile data services has improved internet growth, but Mali's landlocked position makes it dependent on its neighbors for international fiber bandwidth, keeping prices high.

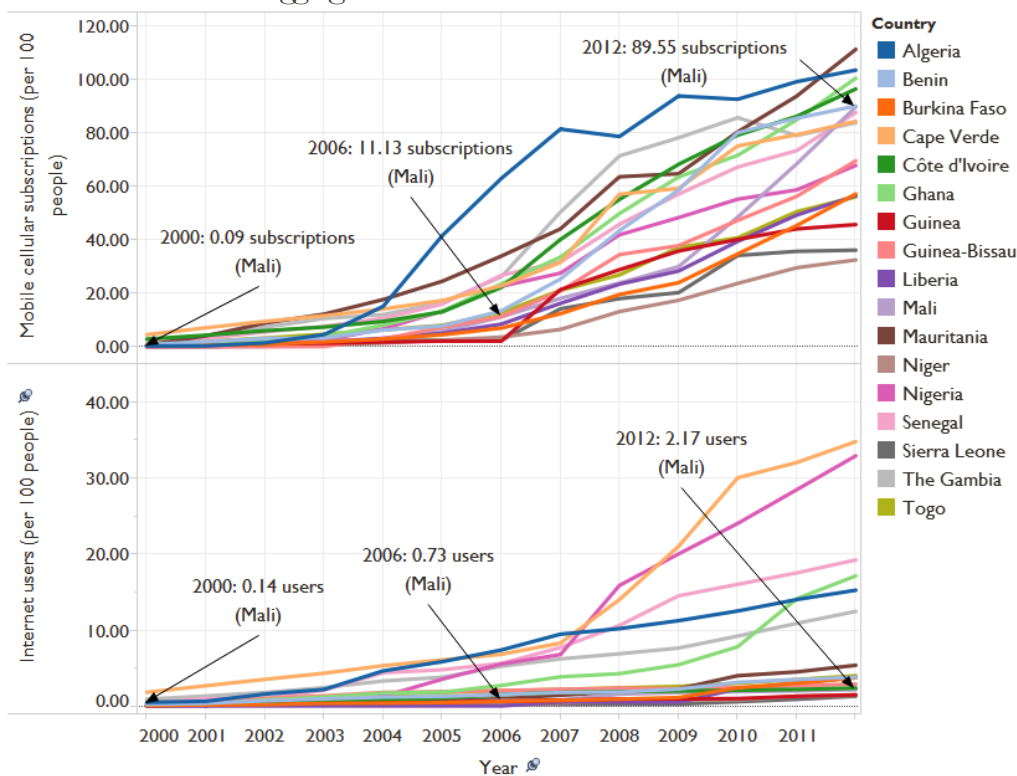
The figures below demonstrate telecommunication trends in the region.

**Figure 14. Few Internet Users, But Many Mobile Subscriptions**



Source: The World Bank DataBank (2012)

**Figure 15. Maintaining Pace with the Mobile Explosion**  
*Lagging Behind in Internet Penetration*



Source: The World Bank DataBank (2012)

## ACCESS FOR HUMANITARIAN ORGANIZATIONS

All international humanitarian organizations interviewed for this report use either Orange or Malitel as their primary communications method. Most organizations also equip field personnel with satellite phones when travelling outside of regional capitals as a safety precaution.

The ICT Humanitarian Emergency Platform, which is run by the World Food Programme, operates the Mali Emergency Telecommunications Cluster (ETC). ETC provides free voice and data connectivity to humanitarian organizations operating in the country.<sup>85</sup> Its services include:

- Security compliant Communications Centers (COMCEN)
- Radio networks to cover common operational areas
- Radio frequency and call-sign coordination
- Training of radio operators and users
- Programming of radios and technical assistance
- Internet access via VSAT in Bamako, Mopti, Timbuktu, and Gao

As of December 2013, ETC is providing security telecommunications services in Bamako, Mopti, Timbuktu, and Gao, and data services in Mopti, Timbuktu, and Gao, to approximately 12 UN agencies and 21 NGOs.<sup>86</sup>

In order to join ETC, humanitarian actors may send a request to [Mali.ETC@wfp.org](mailto:Mali.ETC@wfp.org).

## VII. Energy & Water

### STATE-OWNED SERVICES ARE INSUFFICIENT

Public utility services for electricity and water are run by the companies Energie du Mali (Energy of Mali or EDM) and Société Malienne de Gestion de l'Eau Potable (Malian Business of Potable Water Management or SOMAGEP), which are majority state-owned.

EDM is the largest provider of electricity services in Mali and 66 percent owned by the state. However, EDM has been unable to keep up with the rapid demand in electricity consumption. Power outages are frequent, especially outside Bamako. Most large consumers of electricity (e.g., commercial gold mines) are forced to seek other sources for their electricity needs due to the insufficient and unreliable supply provided by EDM. This represents a large lost opportunity. Gold mines are large users of electricity and spend 52 percent of their operating budget on energy from private service providers.<sup>87</sup>



SOMAGEP, the largest provider of water services, is plagued with similar supply issues as EDM. Service is frequently interrupted, especially between the months of April and June (hot season).

Following the crisis in the North, EDM and SOMAGEP retreated from all cities north of Mopti, and only returned to their offices in Timbuktu, Gao, and Kidal in June and July 2013. As a sign of goodwill towards the communities of the North, both EDM and SOMAGEP have been providing utility services free of charge. Representatives from both structures confirmed to C4ADS that they would begin charging clients again beginning on January 1, 2014.

The UN Department for Field Support concluded that the main challenge for operations in Mali (south and north) is access to power.<sup>88</sup> Due to this poor supply, most international NGOs have their own generator(s) and/or solar panels, both of which can be bought locally. In Timbuktu, Gao, and Kidal, the ICRC provided fuel for generators during the crisis so that hospitals and medical clinics could continue to operate. The Malian government resumed responsibility for these services as of November 2013 in Timbuktu and Gao. Public utilities in Kidal are still assisted by the ICRC.

Since the 2012 coup d'état, electricity supply has greatly diminished. In Bamako, power outages occur much more frequently, but access is fairly steady. In Mopti, humanitarian actors in the field report that electricity service is cut for approximately two hours each day.<sup>89</sup> In Timbuktu, electricity is only available for 11 hours daily. In Gao, EDM has seven generators, but only three are operational and power is only available at night between the hours of 18:00 and 6:00. In Kidal, electricity is available daily between 17:00 and 0:00. Special exceptions are made during nationally recognized holidays, on which power is available throughout the day (such as the Muslim holiday of Eid-Al-Adha and election days). In December 2013, representatives of EDM and SOMAGEP informed C4ADS that efforts would be made to provide power

**Table 4. Utilities' Availability**

*As of December 2013*

	Electricity	Water
<b>Bamako</b>	24 hours/day	24 hours/day
<b>Timbuktu</b>	10:00 – 15:00 18:00 – 0:00	24 hours/day
<b>Gao</b>	18:00 – 6:00	24 hours/day
<b>Kidal</b>	17:00 – 0:00	24 hours/day










Sources: Field Research; SOMAGEP; EDM

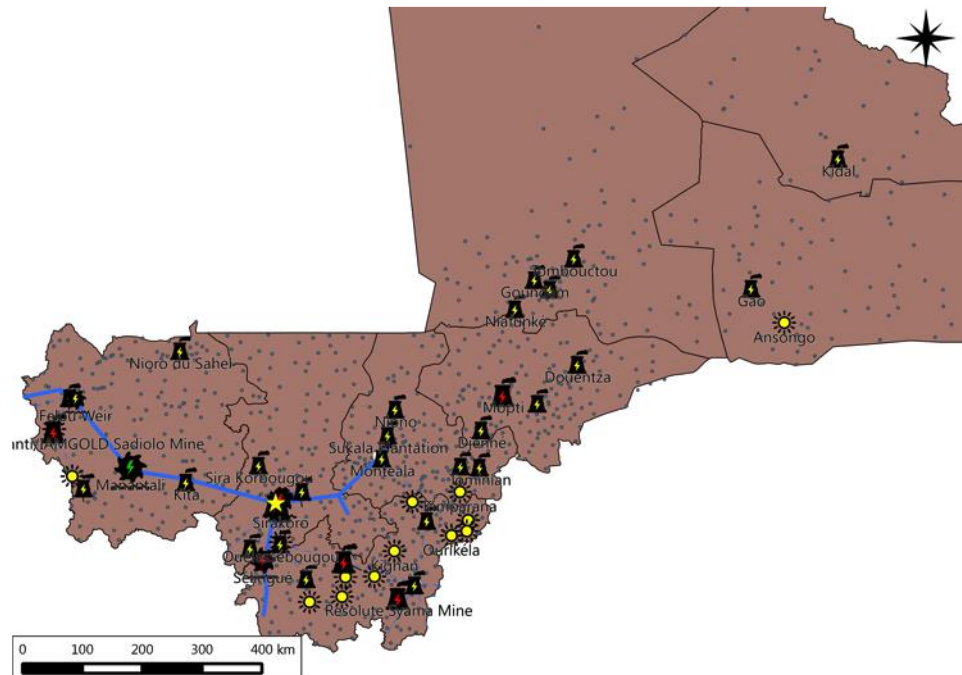
24 hours per day in each of these cities starting January 1, 2014, but this has yet to be confirmed.

The figures below show the electricity network in Mali and the locations of SOMAGEP water services. As can be seen, numerous settlements have no access to public power or running water.

**Figure 16. The Existing Energy Network Leaves Many Uncovered**

**Legend**





- Power Line (Existing)
- - - Power Line (Planned)
-  Hydro Power Plant (greater than 50MW)
-  Hydro Power Plant (5MW to 50MW)
-  Hydro Power Plant (less than 5MW)
-  Thermal Power Plant (5 to 50MW)
-  Thermal Power Plant (less than 5MW)
-  Solar Power Plant (less than 0.25MW)
-  Bamako
-  Regional Capital
-  Settlement

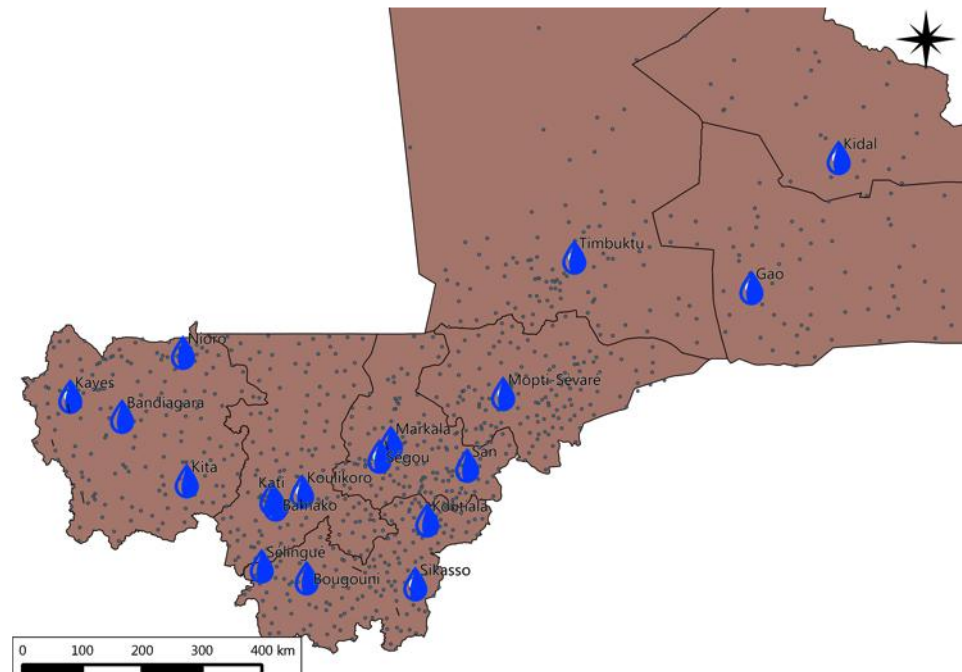


Sources: Africa Infrastructure Knowledge Program; Carbon Monitoring for Action; ECOWEX

**Figure 17. State-Owned Water Utility Locations Are Few**

**Legend**

-  SOMAGEP Site
-  Bamako
-  Regional Capitals
-  Settlement



Sources: Africa Infrastructure Knowledge Program; SOMAGEP

## VIII. Banking

### AN INACCESSIBLE FINANCIAL SYSTEM

The overwhelming majority of banking activities take place in Bamako and rural areas have poor access to formal banks. The high cost of credit also limits access to financial services. There is little information available on clients' creditworthiness, reducing incentives for banks to lend. In an attempt to address this problem, the International Finance Corporation signed a partnership agreement with the BCEAO that will establish regional credit bureaus.<sup>90</sup> Establishing a central authority to report on citizen's credit history will hopefully encourage banks to lend and provide thousands of consumers with access to finance.

Nevertheless, the banking system remains underdeveloped. It is highly concentrated in Bamako and characterized by little competition. In Timbuktu, the branch director at the Banque Malienne de Solidarité (BMS) estimates that less than 30 percent of the city's population use banking services.<sup>91</sup> The branch director at the Banque Nationale de Développement Agricole (BNDA) in Gao estimates that less than 15 percent of the city's population uses banking services.<sup>92</sup> Current clients are primarily civil servants, large merchants, military personnel, and international humanitarian and development organizations.

Despite the 2012 crisis, Mali's banking system as a whole remained stable and liquid. This is largely thanks to prudent stabilization policies by WAEMU.

Citibank New York and American Express bank are the US correspondents for five major banks in Mali: Bank of Africa (BOA), Banque de Développement du Mali (BDM), Banque Internationale pour le Mali (BIM), Banque Internationale pour le Commerce et l'Industrie (BICIM), and Ecobank. From these branches, foreign credit cards can be used to pull out local currency and customers can conduct wire transfers from and to foreign bank accounts.

### THE BOOM IN MOBILE MONEY TRANSFERS

To address the lack of access to the banking system in rural areas, the mobile service provider Orange launched a service called Orange Money in 2008. Mobile money helps to bring financial services to the previously unbanked population. It has been used to drive rural economic growth and promote inclusiveness in the financial system. Customers using mobile money can shift from cash to digital transactions, which are often more convenient and affordable than traditional banking services.



In Mali, Orange branches are much more ubiquitous than bank branches. Those with an Orange subscription may visit a local Orange branch and transfer money to another Orange mobile user anywhere in the country. That user receives a notification and then can visit his or her local Orange branch to redeem the transfer.

However, the crisis in 2012 led to a suspension of Orange Money services in the northern parts of the country because the security of transfers could not be guaranteed, according to a commercial agent from Orange in Gao.<sup>93</sup> Orange Money services have since resumed.

### RESUMING OPERATIONS IN THE NORTH

Banks with branches in the regions of Timbuktu, Gao, and Kidal suffered enormous cash and material losses in 2012. This was primarily due to pillaging and vandalism by Islamists and separatists as they took over

northern cities. Moreover, banks were unable to collect on loans after abandoning operations. According to African Economic Outlook, banks with branches in the north lost an estimated \$37 million dollars in 2012.<sup>94</sup> The BMS branch in Timbuktu reported to C4ADS that its personal losses were in excess of 650 million XOF (approximately \$1.3 million), whereas the BMS in Gao reported losses at 481 million XOF (approximately \$1 million).<sup>95</sup> These figures include cash and materials.

**Table 5. Reopened Banks**

*As of December 2013*

<b>Timbuktu</b>	Banque de Développement du Mali (BDM)
	Banque de l'Habitat du Mali (BHM)
	Banque Internationale pour le Mali (BIM)
	Banque Malienne de Solidarité (BMS)
	Banque Nationale de Développement Agricole (BNDA)
<b>Gao</b>	Banque Atlantique
	Banque de Développement du Mali (BDM)
	Banque Malienne de Solidarité (BMS)
<b>Kidal</b>	Banque Nationale de Développement Agricole (BNDA)
	Banque Malienne de Solidarité (BMS)

Source: Field Research

Since French intervention, most banks have slowly reopened in major northern cities after requests by government authorities. One branch director of a local bank in Timbuktu confided that his bank is currently operating at a loss and that the state is subsidizing banks that have returned.<sup>96</sup> No bank has branches outside of the regional capitals.

The largest problems facing banks in the North now are a lack of liquidity, the loss of key clients, and the threat of being targeted by a terrorist attack. When banks reopened, there was a lack of cash circulating in the local economy. The BCEAO has a regional treasury in Mopti, but transferring cash from here to Timbuktu,

Gao, and Kidal is difficult. There are no commercial flights on which the cash can be transported, and transfer by vehicle is risky because of the high rate of banditry. Thus, all transfers must arrange for a military escort, which are intermittent and expensive. In addition, the economy of Timbuktu (and Gao to a lesser extent) has been seriously weakened by the flight of most Arabs from the population. Arabs traditionally fill the role of merchants and traders throughout the Sahara. One branch director in Timbuktu estimated that 40 percent of the local economy was controlled by Arabs, who were among his largest clients before the crisis. However, he estimates, less than 10 percent of the Arab population has returned, which has slowed economic recovery. Finally, many branch directors in the north live with the fear that they will be targeted by terrorist attacks, as has been the case in Kidal.



BDM Branch, Timbuktu (C4ADS)

In September 2013, state-owned BMS announced that it would return to Kidal. Since then it has been the target of several terrorist attacks. BMS told C4ADS that only two of its personnel are currently stationed at this branch, which is under constant surveillance by MINUSMA troops. The most recent attack on the bank occurred on December 14, 2013 and killed two Senegalese peacekeepers. This BMS branch symbolizes the Malian state in the eyes of many rebels, extremists, and separatists. Since its return, BMS has also been a hot spot for conflict between the MNLA and Malian armed forces.



## IX. Conclusion

While the operating environment has significantly improved from a year ago, Mali continues to present major logistical and security challenges for foreign partners, especially in the North. Economic stabilization and encouraging growth projections bode well for the overall health of the economy, but there are few indications that these will contribute to increased prosperity in the North (beyond that of pre-2012 levels) or will address the grievances of Northern populations.

There is a large, continuing infrastructural disparity between localities in the North and the South, which was further aggravated by the 2012-2013 crises. Most telecommunications, transportation, financial, and utility services have been repaired and are resuming operations, but reconstruction is tepid.

Insecurity is the largest obstacle to safe and effective operations in Bamako and the North. Upheaval and discord within the Malian military forces has the potential to undermine security operations in the North and foster volatile conditions in the capital. The cities of Timbuktu and Gao are relatively secure, but remain susceptible to terrorist attacks by Islamists still present in the region. Civil unrest and massive, sometimes violent, protests against government officials and the police are an additional operational hazard in Gao. Rural areas outside regional capitals are plagued by banditry, unexploded ordnance, and roaming terrorist cells, all of which inhibit humanitarian efforts. Kidal continues to be a “no-go” zone for all humanitarian staff and the security situation shows little sign of improving in the near future.

Despite these challenges, the Malian government is reasserting its authority in the North, with the help of foreign forces, and key services are returning. Continued international assistance, humanitarian and development aid, and foreign investment will be critical to a full and peaceful recovery in Mali. These organizations must be cognizant of the new challenges and changing landscape of the post-conflict environment. Careful preparation and planning will be necessary for safe and effective engagement.



Niger River, Mopti (C4ADS)

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