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DISCUSSION PAPER No. 328

Actors and interests along the Dakar-Bamako corridor

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September 2022

Trade and transport corridors are increasingly cited as a means to implement the African Continental Free Trade Area (AfCFTA) and are at the centre of the EU's recently launched Global Gateway strategy for Africa. This paper looks in particular at the Dakar-Bamako corridor that connects Senegal and Mali. Until recently it accounted for 80% of Malian trade and the second highest traffic density in the region.

This has also brought congestion and inefficiencies. In 2011 both governments discussed how to improve transit fluidity and agreed on bilateral reforms at the high level conference at Kayes. However, by 2021 most of the problems still remained. This paper addresses the question: What economic and political actors and factors explain trade and transport dynamics along the Dakar-Bamako corridor?

Given the economic and political interests in the transport sector, actors are driven by considerations beyond that of (economic) efficiency alone. The Autonomous Port of Dakar appears to be investing in maintaining its role in Malian trade by expanding its capacity and role in the region, with high-level political support. At the same time, Malian shippers are courted by other ports in the region, and in turn seek to maintain options in case of instability, whether due to conflict or, recently, the sanctions by the Economic Community of West African States.

A range of bureaucratic and other rent-seeking interests prevent the full implementation of customs and transit measures to improve trade facilitation. This, despite government commitments to improve circulation of traffic and continued external support to reduce obstacles and improve trade facilitation.

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Acknowledgements

This report was written as part of joint work with ENDA-CACID. The report has benefited greatly from interviews held in Dakar and Bamako, organised and facilitated by Cheikh Tidiane Dieye (ENDA-CACID), and Amadou Diop (ACTRADE). The paper also greatly benefited from discussions of findings with both. We would like to thank the interviewees for their availability and openness to discuss the issues presented here. Thanks also to Inna Perova and the ECDPM communications team for the layout and preparation for publication. Any errors remain those of the authors.

This paper is part of a series of analyses made possible with financing from the Netherlands Ministry of Foreign Affairs in the context of the Trade Facilitation West Africa (TFWA) Programme as well as their broader work in the region. The TFWA is a multi-annual programme financed by three different development partners - the Netherlands Ministry of Foreign Affairs, United States Agency for International Development (USAID), and the European Union (EU). Its implementing partners include the World Bank and GIZ, with the Economic Community of West African States (ECOWAS) and the West African Economic and Monetary Union (UEMOA) as well as countries in the region its beneficiaries.

Acronyms

AfCFTA	African Continental Free Trade Area
AfDB	African Development Bank
APR	Alliance for the Republic (*Alliance pour la république*)
APS	Agence de Presse Sénégalaise
BCEAO	Central Bank of West African States (*Banque Centrale des États de l'Afrique de l'Ouest*)
CAP	Community of port stakeholders (*Communauté des Acteurs Portuaire)*
COSEC	Senegal Shipper's Council (*Conseil Sénégalais des Chargeurs*)
DNTTMF	National Directorate of Land, Maritime and River Transport (*Direction Nationale des Transports Terrestre, Maritime et Fluviaux*)
ECDPM	European Centre for Development Policy Management
ECOWAS	Economic Community of West African States
ETLS	ECOWAS Trade Liberalisation Scheme
EU	European Union
ISRT	Inter-State Road Transit Scheme (*Transit Routier Interétatique*)
NTB	Non-tariff barrier
OPA	Observatory of Abnormal Practices (*Observatoire de Pratique Anormales*)
PAD	Autonomous Port of Dakar (*Port autonome de Dakar*)
PDS	Senegalese Democratic Party (*Parti démocratique sénégalais*)
PNTITD	National Policy for Transport, Transport Infrastructure and 'Dis-enclaving' (*Politique Nationale des Transport, des Infrastructures de Transport et du Désenclavement*)
PSS	Senegalese Socialist Party (*Parti Socialiste Sénégalais*)
SIGMAT	Système Interconnecté de Gestion des Marchandises en Transit
SYNCOR	Union of Malian Road Transport Drivers (*Syndicat des Chauffeurs et Conducteurs Routiers de Mali*)
TRACE	Treatment of Transport Company Complaints (*Traitement des Réclamations des Chargeurs Entreprises*)
TFWA	Trade Facilitation West Africa

UEMOA	West African Monetary and Economic Union (*Union Economique et Monétaire Ouest Africaine*)
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
USAID	United States Agency for International Development
WB	World Bank

1. Introduction

1.1 Corridors as a concept

Trade and transport corridors are increasingly cited as a means to implement the African Continental Free Trade Area (AfCFTA). At the same time, international development actors see them as useful mechanisms to provide support for trade and investment on the ground: 11 corridors are at the centre of the EU's recently launched Global Gateway Strategy for Africa, while corridor infrastructure is "a main pillar of Sino-African cooperation" (Chiyemura et al. 2022).[1] These corridors, linking coastal ports to hinterland states, are by no means new in Africa, generally building on historical transport connections. While regional 'corridor approaches' re-emerged in the late 1990s as a way to facilitate cross-border trade and transport, and thus regional economic development, their place in trade and development policies continues to rise (Nugent and Lamarque 2022).

In principle, landlocked countries have a particular interest in improving accessibility to ports for imports and exports, while coastal countries might be expected to compete for traffic through their ports. There is a common assumption that a more cost and time-efficient corridor will encourage trade, and therefore socio-economic development.[2] But a closer look at the actors and factors that shape transport dynamics along corridors reveals that the interests of different stakeholders, and their power to block, are quite diverse. That is, various actors are driven by interests other than increasing efficiency. This is important to explore if corridor-related policies aimed at enhancing transit efficiency and effectiveness continue their prominence.

This paper looks in particular at the Dakar-Bamako corridor that connects Senegal and Mali. Until recently, Mali relied on the Dakar-Bamako corridor for 80% of its trade (SENtract 2022), giving it the second highest level of traffic density in the region (LeQuotidien 2021). This has also brought congestion and inefficiencies, corruption and excessive time required to move goods along the Dakar-Bamako corridor. Economic Community of West African States (ECOWAS) sanctions imposed on Mali in early 2021 - in light of the transitional authorities' failure to programme presidential elections - slowed traffic and raised concerns about the impact this would have on the Dakar-Bamako corridor, and thus the Senegalese and Malian economies (Diallo and Assoko 2022). Those sanctions were lifted in July 2022 (France24 2022) though the full effects of the sanctions have yet to be analysed.

Both the Senegalese and Malian governments ostensibly have an interest in improving trade flows along the Dakar-Bamako corridor. For landlocked Mali, it is part of a broader strategy to retain options among ports for both imports and exports;[3] for Senegal the government has made regional integration a core part of its latest national strategy - the *Plan Sénegal Emergent 2019-2023* foresees Senegal as a gateway to the region (République du Sénégal 2018).

While that may be so, the long list of challenges to trade along the Dakar-Bamako corridor is not new. 2011 saw a bilateral high-level conference between the two governments on ways to improve transit fluidity and agree on a bilateral reform approach - known as the *Conference de Kayes*. Co-chaired by the two prime ministers, with public and private sector actors in wide attendance, this was a first in bilateral relations and led to a long list of

[1] The EU Global Gateway Strategic Corridors can be found in the European Commission website (EC 2022).

[2] See, for example, the theory of change of TradeMark East Africa, a donor-funded mechanism for supporting trade facilitation in East Africa along key corridors (TradeMarkEA 2020).

[3] The Malian government as well as its firms have relations with several ports in the region (AfDB 2012). Under the current sanctions, Mali's government has increased its efforts to facilitate transport through other ports, notably Nouakchott and Conakry (Konaté 2022; Rizk 2022).

commitments to facilitate trade along the corridor (GIZ 2015). These focused on reducing the number of checkpoints, eliminating the associated corruption, enforcing axle-load limits, and implementing the Inter-State Road Transit Scheme (ISRT - TRIE in French). It also led to the creation of joint committees with a permanent secretariat to monitor progress, as well as national monitoring committees (GIZ 2015a).

But in spite of these commitments and institutional structures, the transport and transit problems cited in 2011 largely remain. Renewed efforts were made through the so-called *Pacte de Saly* in 2020, resulting in 58 different points for action, many of which had been raised in 2011, but with little progress made in 2021, when this study was conducted. This led to strikes by the unions of drivers and others to protest the tolls and levies charged, harassment at checkpoints, and complaints around weighbridges in both countries. The latest of these was in Senegal in December 2021.[4] Many interlocutors thus remain sceptical about how much common interest there is among the multiple corridor actors to bring down trade and transport times and costs along the corridor.

This paper therefore addresses the question: *What economic and political actors and factors explain trade and transport dynamics along the Dakar-Bamako corridor?* It analyses the different factors, practices, interests and incentives that shape trade and transport along the corridor using the five political economy 'lenses' laid out by Byiers and Vanheukelom (2016).

More specifically, after presenting the case for political economy analysis in Section 2, Section 3 discusses the structural factors, external factors, high-level institutional frameworks and actors underpinning corridor relations. Section 4 then zooms into five 'sectoral' corridor-related problems areas:

1. port ownership and competition;
2. freight distribution mechanisms;
3. interstate transit procedures;
4. application of regional axle load regulations; and
5. harassment and other non-tariff barriers (NTBs).

The paper seeks to contribute to a growing interest in looking at intra-regional trade not just from a technical point of view, but also looking at political interests and incentives in promoting smoother cross-border trade. It seeks to explore how state-business relations, regional organisations, and the combination of private ownership patterns and public management of different parts of the corridor can help or hinder reforms that seek to improve efficiency. It is based on a combination of deskwork and stakeholder interviews held in Dakar and Bamako in December 2021.

1.2 Main findings

The main points to emerge from the analysis are the following:

1. **Political relations** - Though Dakar has been the dominant port for Mali trade since the early 2000s, and (high-level) relations between the two countries have been good, instability in the region has led the Malian authorities to maintain diverse corridor options. This was underlined by recent ECOWAS sanctions, with other ports seeking to attract Malian transit traffic.
2. **Dakar Port** - Though handling charges remain high by regional standards, Dakar Port terminal concession is run by Dubai-based DP World, thus bringing a degree of competition to the regional container terminal duopoly. The Port of Dakar is also investing in maintaining its role in Malian trade, and indeed is expanding

[4] Protests are currently ongoing in Senegal (TV5MONDE 2021). Demonstrations also took place in Mali earlier in the year with dissatisfaction over similar issues (Bendhaou 2021).

its capacity and role in the region, with high-level political support. These efforts are arguably undermined by what happens elsewhere in the corridor.

3. **Freight distribution** - A combination of formal quotas for transit goods, and informal networks of Malian freight-forwarders and intermediaries manage to ensure that Malian trucks carry the bulk of transit goods along the Dakar-Bamako Corridor. Despite attempts to introduce a digital freight-sharing platform that would increase transparency and competition, the incentives at play for those actors controlling this section of the transport value chain relate more to securing freight loads rather than transparency, competition and price.
4. **Interstate transit** The ISRT is not fully implemented due to a combination of resistance from importers and freight forwarders who, respectively, see it as an additional 'new' cost, and as a way to undermine their role. Though the practical difficulty of sealing non containerised goods has in theory been resolved, customs services have a vested interest in maintaining the charges for escort service for the revenues it creates. This use of the 'old system' also undermines the ability of the customs service in Senegal to use SIGMAT, the digital customs connection that further aims to ease the flow of goods by sharing data on transit goods, thus reducing the potential benefits of digitisation and greater trade flow transparency.
5. **Axle-load limits** The nature of the transport sector, particularly in Mali, means that transport companies and own-account truck drivers have invested in reinforcing trucks in order to maximise the loads carried in one trip. This contravenes the regional axle load limits, feeds a system of bribery, thus damaging the roads but also undermining the goal of efficiency through sealed containers, that would then more easily be compatible with the ISRT.
6. **NTBs and roadside corruption** The combination of the above introduces conditions that encourage harassment and roadside corruption - trucks with inadequate or incorrect documentation, or overloaded vehicles are subject to more harassment and greater bribes at checkpoints, Borderless Alliance 2013), further undermining the efficiency of the corridor, and leading in some cases to transport sector strikes.

Overall, despite government commitments to reduce obstacles and improve trade facilitation in 2011, a range of bureaucratic interests and rent-seeking have delayed progress, resulting in a continuation of those problems and high transport prices today. It remains to be seen how the ECOWAS sanctions and subsequent reduction of trade along the Dakar-Bamako corridor have affected these different interest groups.

2. Context - the logic for political economy analysis

2.1 Longstanding transport challenges

Despite long-running attempts to implement trade and transport reforms, transport prices along the Dakar-Bamako corridor remain high, affecting firm competitiveness and ultimately economic growth and development in the region. The cost to export is higher in Mali than the average for the West African Monetary and Economic Union (also known under the French acronym, UEMOA) or Sub-Saharan Africa (WB 2018). In general, transport costs in West Africa's landlocked countries are three to four times higher than in developed countries, amounting to as much as 15-20% of import costs (World Bank 2019), and are 50% higher than in coastal countries (WB 2019). Transport costs along the Dakar-Bamako road corridor specifically are estimated at about 30% of merchandise value in 2016 (Ibid.) Many of the reasons for this have previously been identified. Though they relate partly to physical infrastructures, key also are the relationships and incentives that shape policy implementation and the behaviour of individual groups and actors along corridors.

Transport costs also vary by commodity - for high value products like gold, transport costs are less than 1%, compared to 13-19% for cotton, rising to as high as 74% for mangoes (WB 2018). For landlocked countries like Mali, levies (both official as well as informal) can amount to 25-30% of the value of essential products (AfDB 2012). Costs can also come in terms of delays - the waiting time for customs procedures in Mali increased from 4.8 days in 2007 to 16.5 in 2016, well above peer countries (Ibid.). Several reports point to the potentially large benefits that could arise from reducing transport time and costs, suggesting trade could be increased by up to 25% (WB 2019).[5]

The high costs of transport along the Dakar-Bamako corridor today reflect the same difficulties identified more than a decade ago. A high-level conference was organised in 2011 in Kayes, a town on the Malian side of the Dakar-Bamako corridor, in response to growing frustrations with high transport costs and delays. The *Conference de Kayes* brought together the Prime Ministers of both countries with staff from other Ministries and agencies, including the Presidential Council for Investments in Senegal and its Malian counterpart the Specialised unit looking at business climate reforms (CTRCA). It also included representatives from the private sector, development partners and civil society organisations, together all signalling the apparent political significance of the corridor and the constraints faced (Mali and Senegal 2011).

Following the Kayes Conference in May 2011, all parties agreed to stop "all illegal practices" and adhere to the UEMOA treaty and ECOWAS protocol related to the free movement of goods and persons. This included an agreement to implement the "inter-state road transit" (ISRT) convention (*TRIE* by its French acronym) by the 1st of July 2011;[6] reduce the number of checkpoints on the corridor to three; and comply with the "règlement" 14 of the UEMOA that seeks to harmonise truck axle load limits among countries (hereafter UEMOA Reg. 14). Following the Kayes Conference, a set of joint committees were created to further understand specific bottlenecks and seek pragmatic solutions among involved actors.[7] In many ways this started out as a model process, with high-level buy-in, a pragmatic, problem-driven approach, and clear work plan to follow-up (Andrews et al. 2015).

There has been limited progress in addressing these challenges. In 2011, the total costs, both formal as well as informal, of transporting a 20 feet container carrying 25 tonnes of rice (Figure 1 left hand side) were higher than for a truck carrying 30 tonnes in bulk (Figure 1 right hand side).[8] Within these costs, a higher share went towards informal payments including bribery ("Tracasseries") as Figure 1 also shows. Despite attempts to address these, by 2019, the average amount of illicit payments per trip and per corridor in the whole UEMOA region increased, with the highest amounts being recorded along the Dakar-Bamako corridor (FCFA 175,253 against an increased average of FCFA 71,081 regionally, OPA 2019).[9] The "Observatoire de Pratiques Anormales" (OPA) recorded 20-25 checkpoints as recently as the second trimester of 2020 (OPA 2020). Another OPA report found that the Dakar corridor was the 'most critical' in the region (Jeelany 2020).

[5] Another study cited by the World Bank estimates that reform and modernization of road transport in West Africa could result in net economic benefits of around US$400-500 million per year, reduce transport prices by 19%, and increase transit trade by about 8%. Benefits to specific actors are also sizable, including US$60 million in net revenue for the regional trucking industry, along with a gain of US$200 shippers, producers and consumers in landlocked countries (WB 2016).

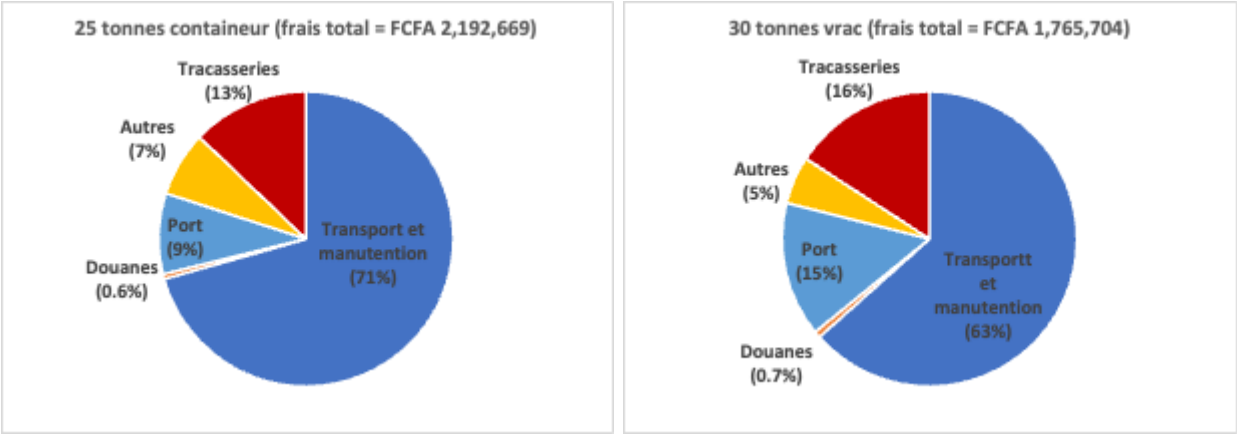
[6] This includes the use of a unique ISRT booklet, collection of a guarantee by the respective chambers of commerce, as well as the use of a badge to identify vehicles under this system (Mali and Senegal 2011).

[7] These included four groups looking at obstacles for agricultural products; livestock; industrial products; and a last group looking at transport and infrastructure.

[8] Approximately € 3,343 against € 2,692 (AfDB 2015).

[9] According to AfDB (2015), escort fees make up about 70% of the costs linked to harassment and 'unjustified fees'. Interestingly they are lower for bulk transport in absolute terms, but higher relative to their overall costs.

Figure 1: Break-down of corridor costs (2011)



Source: USAID 2011 cited in AfDB 2012

Following continued transport sector complaints, renewed discussions took place in November 2020, resulting in the "Pacte de Saly". Although focused on Dakar port actors, it also included Malian Warehouse representatives and led to agreement on 58 points to be addressed to improve the functioning of the port and road corridor. These again included calls to stop truck harassment to ensure the smooth flow of trucks, as well as development of the railroad (Jeelany 2020). Given the overlaps between the *Pacte de Saly* and what came out of the Kayes conference in 2011, it seems important to ask: who and what are the deeper actors and factors that help explain the continuing challenges on the Dakar-Bamako corridor? The hypothesis here is that high transport prices are the outcome of the political economy dynamics along the corridor. The fact that renewed transport sector strikes took place in December 2021, further underlines the urgency of addressing problems rather than simply identifying them (VOA 2021).

2.2 Taking a political economy approach

Our analysis takes a political economy approach to examine how different political and economic actors and factors interact to produce the status quo, building on the five political economy 'lenses' discussed in Byiers and Vanheukelom (2016). As they discuss, economic and political decision-making and implementation of policies is often determined not according to neutrally applied, formal decisions and rules, but under the influence of political, power and interest driven considerations. Political economy analysis brings these considerations to the fore, offering a way of systematising information to help understand 'why things are as they are', thus opening a window for dialogue and exploration of adaptive responses rather than narrow reform prescriptions.

The analysis focuses on the following lenses:

1. **structural/foundational factors** - social, economic, or political features that are typically unchangeable or slow-moving - e.g. geography, demography, ethnic or religious make-up, resource endowments, quality of human capital, colonial history, etc.
2. **institutional factors** - both *formal* state, government, rules, strategies and laws; as well as *informal* "rules of the political/economic game" and behavioural aspects that *combine* with formal rules to shape behaviour. This includes 'elite bargains' - discrete agreements between socio-economic, political and military elites on the distribution of power and allocation of resources (Lemma and te Velde 2017), which may involve a

'development bargain' in the form of commitment to shape politics, economy and society towards growth and development (Dercon 2022). These depend on such concepts as state-business relations including its formal as well as less visible and informal aspects.

3. **actors** - stakeholders who are likely to affect or be affected by the context or particular intervention being examined. These include political actors as well as those from the public and private sectors, whether groups or individuals, where groups are either self-defined or according to apparent common interest.
4. **sectoral factors** - features of particular sectors or specific policy areas which influence the incentives and interests of stakeholders (providers, users and politicians) in different ways - some sectors (e.g. infrastructure) have more political salience. More visible policies often imply more easily attributable credit (or blame)
5. **external factors** - that affect the domestic political economy e.g. shifts in global trade patterns, external security risks and threats, climate change. Unlike foundational factors, external factors can abruptly change.

By systematising information according to these five lenses, we seek to help identify what supports, and what works against establishing a more efficient corridor, so that support to the corridor can in turn be more realistic and targeted. Failure to take account of these aspects risks undermining reforms, as seems to have been the case to date, thus suggesting a need for more gradual, problem-driven approaches that seek 'best fit' rather than 'best practice' approaches.

The next section looks at trade and transport along the Dakar-Bamako corridor in terms of the actors and factors that support or undermine the smooth functioning of this corridor.

3. Actors & factors affecting the Dakar-Bamako corridor dynamics

This section looks at the structural factors, external factors, institutional factors and high-level actors and interests that have an impact on trade and transport costs along the corridor in broad terms. Section 4 adopts a 'sectoral lens' to examine the political economy dynamics around specific aspects of the corridor.

3.1 Structural factors

The ties that bind

Historical experience and cross-border cultural ties combine with economic and geographical factors to shape contemporary cross-border relations. Senegal and Mali share a common and rich history dating back to the Mali Empire and today share languages such as Fulani, Bambara, Soninké, and Manding as well as the predominance of Islam.[10] Perhaps more specifically for trade and transport relations, the two countries were as one under French West African colonial rule, and subsequently formed the short-lived Mali federation (Bach 2016). Although the federation did not last,[11] the bonds and movement of people between the two countries and people are closely "entangled" (e.g. Choplin and Lombard 2010), even if the movement of people between the two is often 'unofficial' and subject to barriers. The resulting cultural affinity, confirmed in interviews, supports the use of the Dakar-Bamako corridor over other corridors for Malian trade.

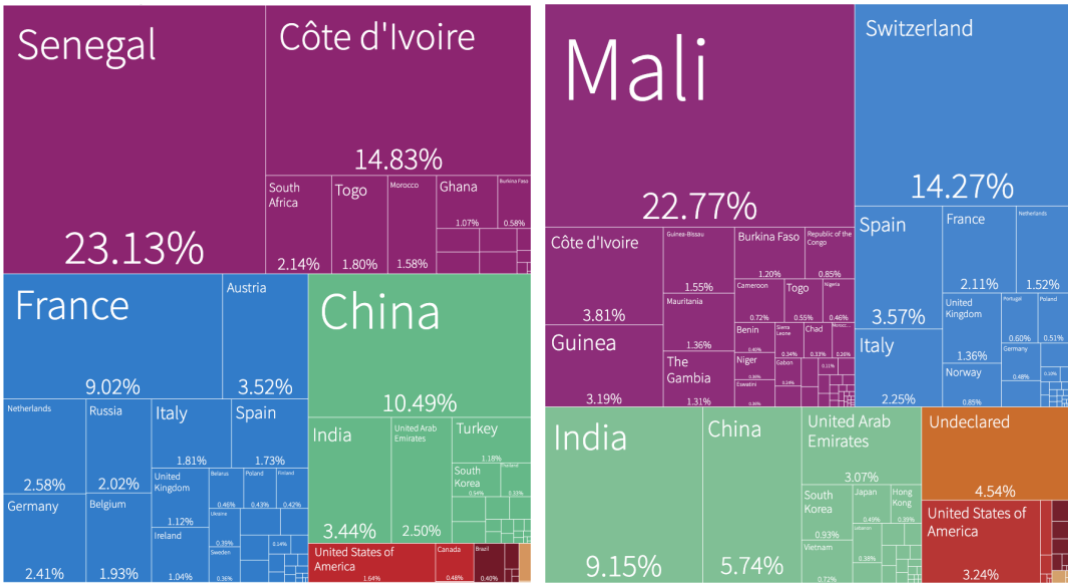
[10] This point was highlighted in past discussions about improving trade facilitation along the corridor at the Kayes conference

[11] While Houphouët-Boigny (of Côte d'Ivoire) did not believe in federalism, Senghor (of Senegal) and Keita (of the then Soudan) did, leading to their participation in the Mali Federation along with Upper Volta and Dahomey. However, tensions soon became untenable between the "moderate and conciliatory" Senghor and the "radical and anti-French" Keita resulting in the break up of the Federation (Jacob 2013).

But Dakar is not Bamako's closest port and neither has it always been the main trade route. The closest port is Conakry in Guinea, followed by Abidjan in Côte d'Ivoire, which was also the main route for Malian trade until the early 2000s. When Senegal temporarily closed its border to Mali in 1960 at the collapse of the Mali Federation, Cote d'Ivoire's Houphouët Boigny stepped in to broker a loan to enable landlocked Mali to purchase German lorries and reroute transit trade through Abidjan (Bach 2016). While that cemented the predominance of the port of Abidjan until the early 2000s, the situation was reversed by Côte d'Ivoire's civil war, allowing Dakar to take advantage and position itself as the main gateway to Mali. Mali-bound transit trade through Abidjan fell from around 80% of transit trade in 2000 to 14% by 2003 (Briceño-Garmendia et al. 2011), while Mali-bound transit trade through Dakar rose to two thirds (WB 2019). Today the proportion has increased further to 80% (SENtract 2022).[12]

In addition to this transit trade, Senegal and Mali have become important trade partners. From 1996 until 2001, approximately 25% of Mali's recorded imports came from Côte d'Ivoire, dropping to 10% in 2003, while those from Senegal rose from between 5 and 7% between 1996 and 2002, to 24% in 2008, a level at which it has stayed since.[13] The share of Malian imports from Senegal stood at 23% of the total (US$4.15 billion) in 2019, above Côte d'Ivoire, Togo and Ghana (Figure 2, left); indeed Senegal accounts for roughly 45% of Mali's imports from the region (BCEAO 2020). Figure 2 (right) also shows the share of export destinations from Senegal, where Mali again accounts for approximately 23% of total exports to the world (valued at US$4.22 billion in 2019).[14] Indeed, Senegal exports more to Mali than it does to the whole of Asia, and France put together, with two-thirds of Senegalese exports to the region in 2019 to Mali alone. Together, these figures all underline the importance of the Senegal-Mali trade relations.

Figure 2: Mali import origins (left) and Senegal export destinations (right), share of total, 2019



Source: Atlas of Economic Complexity

The nature of the goods flowing from Senegal to Mali is also important. Although shares vary year by year, of $960m of Malian imports from Senegal in 2019, nearly 55% of this was for petroleum goods, and 12% was cement, the two

[12] Mali-bound transit through Dakar, after fluctuating between 300,000 and 600,000 tons in the early 2000s has reached more than 2.6 million tons today (Lombard 2022).

[13] Based on figures provided by the Atlas of Economic Complexity.

[14] These figures exclude goods recorded as being in transit, thus suggesting that an even larger share of Malian imports likely pass through Senegal.

largest individual import products. Agricultural products as a group accounted for 14%.[15] As such, Mali depends on Senegal for a rising share of imports, including key basic goods. Malian exports transiting through Dakar are dominated by cotton (WB 2017).

Prior to the ECOWAS sanctions in early 2022, 1,000 trucks crossed the border every day, reportedly bringing the Senegalese government FCFA 253 billion (nearly €400,000) per year (Leye 2021), a representing more than 10% of overall tax revenues (WB 2022) and thus strong Senegalese interest in the smooth-functioning of the corridor. At the same time, for every five import containers there is only one export container, representing a large trade imbalance (WB 2017).

In the past, road transport between Dakar and Bamako was supplemented by the now defunct railway. That carried 80% of freight along the corridor, before falling to about 20% in 2003 (Hamilton 2010). That is a decline from 566,000 tonnes in 1998 to 38,000 tonnes in 2003 (AfDB 2005).[16] Under a new concessionaire, traffic recovered to 425,830 tonnes in 2004 but by 2015, operation of the line was terminated due to dilapidating infrastructure stock, as well as poor operational performance of the private concessionaire and lack of modern railway practices, all of which meant that traffic remained limited.[17] While before the early 2000s the Dakar-Bamako corridor accounted for a relatively small share of the overall transit traffic, with most carried exclusively by rail, the surge in traffic following the crisis in Cote d'Ivoire could not be accommodated by the rail and the dominant mode of transport changed from rail to road (WB 2019). Today, around 90% of the transit traffic to/from Mali is carried by road operators (Lombard 2022).

Multiple stakeholders cite far less harassment and delays when the railway was running between Dakar and Bamako.[18] While there is interest among Senegalese actors and some development partners to revive the railway, according to interviewees this interest is not shared on the Mali side, mainly because of the strong political position of the road transporters (Interview Port, Shippers' Council, road transporters union, customs agents union 2021) but also given high levels of investment by the state and private sector in renewing the Malian truck fleet (Interviews 2021).[19]

These important historical, socio-political and economic connections create an interdependency between the two countries that help underpin the dynamics around the Dakar-Bamako corridor. They also show why, when Mali faced sanctions from ECOWAS and UEMOA, there was pressure from political and civil society groups in Senegal to disassociate the country from, and denounce, the sanctions (Ba 2022).

[15] See Atlas of Economic Complexity data here.

[16] At its peak this carried 30-35% of the passenger traffic, about 2.6 million passengers per year (Lombard and Benjamin 2015).

[17] The volume of traffic not only fell below 300,000 tonnes in 2011, but also continued to decline to 288,086 tonnes in 2013, 244,858 tonnes in 2014, 210,008 tons in 2015, and 74,989 tons in 2016 (Lombard 2022).

[18] Jónsson highlights how women bana-bana traders came to dominate cross-border trade going back over a century, unlike recent structural adjustments which have created much of the informal trading due to lack of other productive opportunities. Wives of railway employees began engaging in long-distance trade in the 1920s-30s. Their connections with civil servants also brought them certain power and influence. However, the author argues that with liberalisation, these women lost their competitiveness since imports from elsewhere became cheaper, and privatisation of the railway also meant that these women traders were forced to look for alternatives (other destinations like Burkina Faso, Cote d'Ivoire and Guinea Conakry as well as bus route to Dakar) which have not been as optimal (Jónsson 2019).

[19] For instance, the tracks on the Mali side are allegedly already covered by settlements.

3.2 External factors

Insecurity and corridor diversification

Though the above structural factors underpin the importance of Senegal in the Malian economy through the Dakar-Bamako corridor, a range of factors that are external to the Dakar-Bamako corridor also shape its use and performance.

Dakar's dominance in Malian transit trade is reinforced by instability in the region today. Unrest in neighbouring countries pushes Malian transporters and shippers towards the relatively safe option of the Dakar corridor. For instance, tensions in Burkina Faso make the option of using the port of Lomé in Togo too risky for actors in Mali, even though the port is among the more efficient ones in the entire West African region (Ball Nguele and Youfang 2019; Kakpo 2018). Recent attacks have raised concerns that instability in neighbouring Burkina Faso, Mali and to some extent Niger may spill over to coastal countries like Cote d'Ivoire, Benin and Togo as insurgent groups seek to gain access to the sea (Nsaibia and Duhamel 2021; Arslan 2022; Toulemonde 2022), as underlined by recent attacks in northern Togo (Weiss 2022). Over-reliance on one corridor therefore risks over-dependence.

Being landlocked, and given its experience during the war in Cote d'Ivoire, access to multiple seaports is deemed of strategic importance to Malian shippers and indeed the government. The Malian government has invested in relationships with the coastal countries in the region, all the way up to Algeria (Sene News 2011), while Malian shippers are courted by delegations from the ports of Tema, Lome, Conakry and Banjul in an attempt to bolster their share of Malian trade. The Malian National Directorate of Land, Maritime and River transport (DNTTMF) has set up Malian Warehouses in partner countries including Cote d'Ivoire, Senegal, Guinea Conakry, Ghana, Benin, Mauritania and Togo thus providing representation in each port. Since 1963, Malian Warehouses in Senegal (EMASE - *Entrepôts Malian au Sénégal*) have been installed at the port of Dakar and Kaolack (some 200km from Dakar on the main Bamako road) to ensure the application of international transit regime, but also representing Malian interests in the port.[20]

This has arguably promoted competition among coastal states, to the benefit of Mali, whose dependence on any one of them is reduced (Lombard 2022). Further, Lombard (2022) sees this as strengthening the hand of Malian traders given that Senegal lies "at the far end of the axis from Mali, and thus from central West Africa" making Mali a more central 'player' in regional integration dynamics. This suggests that while Mali has alternatives, Senegalese actors must work to maintain their current advantage with regards Malian trade as a way to access trade beyond.

This struggle by Dakar to maintain its position was brought into sharp relief with the ECOWAS sanctions. Those pushed Malian traders to use other routes via countries not applying the sanctions, like Guinea, or outside ECOWAS, such as Mauritania (see below). Even if trade in essential goods (fuel, medicines, and food) through Senegal was allowed to continue, the sanctions led to not only lost transport business and lost state revenues, but also lost business by firms producing non-essential goods like cement for which Mali is a major market (LeQuotidien 2020). Mali was reportedly replaced by Switzerland as Senegal's top export destination after one month of sanctions (Diawara 2022). Even without the temporary shock of the sanctions, Senegal nonetheless continues to face competition in maintaining its position as the desired port for Malian shippers.

[20] By way of reciprocity, Senegalese warehouses also exist in Mali (ENSEMA) which used to cater mainly to the railway traffic (République du Sénégal 2004).

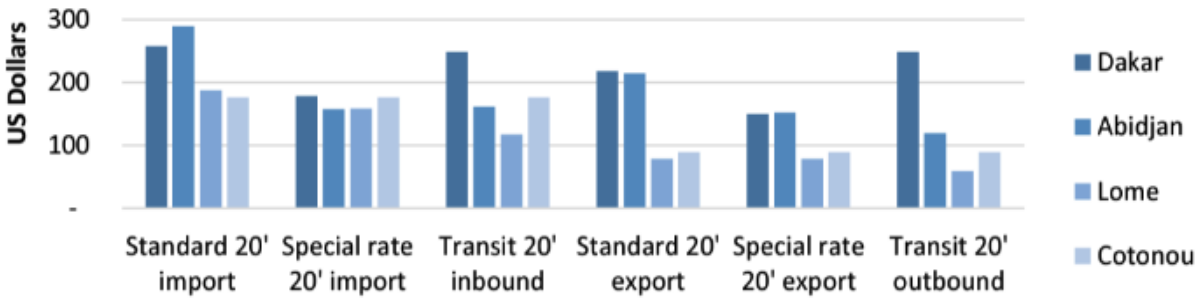
Port competition and ownership

Beyond Malian issues of corridor diversification, there has long been concern about the level of competition between ports in West Africa. The World Bank (2017) discusses how the wave of private port concessions has brought only diluted benefits: "Former public monopolies at the national level have to a large extent been replaced by a region-wide, dominant position of two [terminal operating companies Bolloré Logistics Limited (BAL) and APM Terminals], which compete or cooperate in different ports and together control around 80 percent of West African container throughput." Although Bolloré sold all its African assets to MSC in early 2022, the regional duopoly continues in another guise (Caslin 2022; Descamps 2022).

Senegal has ostensibly bucked this regional trend. Although Bolloré and Maersk (part of APM Terminals) were present in Dakar port until the early 2000s, this came to an end under Abdoualye Wade's presidency (Lombard 2022). Instead, in 2007 the container terminal concession went to DP World of Dubai (Diop 2018).[21] This made the port of Dakar an exception in the region, ostensibly increasing competition among regional terminal concessions. Nonetheless, Bolloré was later awarded the roll-on-roll-off terminal concession, in what some see as compensation for losing the container terminal under the previous government (RFI 2013).[22] Necotrans, a French logistics firm, has the concession for the bulk terminal, and since 2017 was partly owned by Bolloré (Rassoul 2017).

Though even this small degree of regional competition might be expected to bring down the prices of using Dakar port, it instead remains one of the most expensive in the region (see Figure 3). This is reportedly due to high port fees charged by the Autonomous Port of Dakar (PAD), as well as those charged by the terminal concession-holders, thereby adding to transport costs for shipments through Dakar port (Logistics firm Interview 2021).

Figure 3: Container Handling in Selected West Africa Ports (US$)



Source: WB 2017

Insecurity for ships awaiting entry into other ports in the Gulf of Guinea has reportedly helped Dakar's position in attracting regional traffic as a secure port but this has also led to congestion (e.g. PAD Interview 2021). This can mean ships paying $16,000 per day to wait in Senegalese waters, even leading some to dump shipments rather than

[21] The eventual award was not without scandal, requiring additional payments from Dubai World to the Senegalese government after investigations carried out under the government of Maky Sall: "DP World proposed to pay an entry ticket of 54 billion CFA Francs for the concession of the container terminal. This ticket was split in two with 30 billion CFA Francs in cash paid at the signing of the concession, and the remaining 24 billion CFA Francs paid through the ownership of 10% of the shares of DP World Dakar. However, the IGE review established that all of DP World Dakar shares value was only 1 billion CFA Francs, thus the 10% awarded to the Port Authority of Dakar were worth only 100 million CFA Francs. To settle the dispute, DP World agreed in June 2013 to pay in cash (?) to the Government of Senegal 24.6 billion CFA Francs, equivalent to $48 million 31, to settle this valuation matter." (WB 2017).

[22] There are a total of five concessionaires at the PAD - DP World for container, Bollore for RoRo, Necotrans for bulk, Grande Côte Opérations for minerals, Belgian Sea Invest for the oil wharf (PortDakar 2022).

wait (PAD Interview 2021). While this could be resolved with further mechanisation, there is reportedly resistance by 2500 stevedores employed in the port. Part of the problem is also the limited area available for further port expansion of the port.

Nevertheless, moves are underway to decongest the port by working towards quicker (un)loading from trucks given the high traffic of trucks passing the port everyday (1,800-2,000 according to some).

Beyond Dakar port itself, DP World has also been awarded the contract to develop a new port at Ndayane, 50km from Dakar, where construction was formally launched in January 2020 (DP World 2022). There are also reportedly plans for an accompanying special economic zone, with Malian investors already expressing an interest (COSEC Interview 2021), and proposals to establish several dry ports along the corridor that may also help with decongesting the port (COSEC Interview 2021; LeQuotidien 2017). A new bulk port at Bargny-Sendou, outside Dakar, is also expected to relieve some pressure from the port of Dakar when it opens, originally foreseen for 2022.[23]

Overall, there is a sense of recognition of the threat of losing out to other ports in the region, particularly Conakry (Mali Forwarder Interview) and Abidjan, where port charges are reportedly lower (Private Sector Interview 2021). That would seem to be pushing Senegalese actors to seek ways to invest and decongest the existing port facilities, thus supporting moves to raise port and corridor competitiveness. The trade imbalance also leads some Malian truckers to favour Senegal over Côte d'ivoire given that cotton exports, the main transit export, are exported via San Pedro in Côte d'ivoire from where there are very limited imports to transport compared to Dakar where there is always a backhaul (Private Sector Interview 2021). Apart from this, port interviewees talk of looking beyond the Dakar-Bamako corridor to thinking about how to connect the port with the wider region through greater transhipment. This would bring more business, with smaller ships providing maritime connections to Cape Verde, Guinea Bissau and Gambia, where there is reportedly Chinese interest in investing (PAD Interview 2021).

3.3 Regional and national institutions

Beyond the above structural and external factors, a series of institutions - understood as the 'rules of the game' (North 1990) - shape the context in which trade and transport reforms take place and how actors engage with one another along the Dakar-Bamako corridor. These include both formal institutions such as the policies, strategies and agreements in place, ostensibly to facilitate trade, and the less tangible but no less real norms, customs, ideas and beliefs (or informal institutions) that shape the behaviour of different actors differently. Both are discussed before key actors and interests along the corridor are discussed in Section 3.4.

Institutional Agreements

Mali-Senegal trade and transit is governed at the multilateral level by the Convention on Transit Trade of Land-locked States, signed in 1965. This provides international rules to guarantee landlocked country access to seaports (UN 1965). UEMOA and ECOWAS trade and transit regulations also govern trade along the corridor. The Dakar-Bamako corridor is within the ECOWAS customs union, with a common external tariff, complemented by the ECOWAS Trade Liberalisation Scheme (ETLS) governing intra-ECOWAS trade. Although together these seek to promote regional trade, thus also facilitating Senegal-Mali trade, application of the ETLS in practice often undermines smooth trade flows (Byiers and Tidiane Dieye 2022).

[23] The port was originally expected to be operational by March 2022, with three terminals for minerals, oil, and cereals respectively, with a combined capacity of handling 20 million tonnes (CR 2021). This has been delayed to September 2022 (APS 2022).

Mali and Senegal have also regularly held bilateral cooperation meetings to facilitate trade along this corridor. Beyond the *Pacte de Saly* in November 2020, mentioned above, the 13th Grand Joint Cooperation Committee between Senegal and Mali was held in March 2021, led by the Foreign Ministers of both countries. Although the first in ten years, this led to eleven new agreements covering a range of aspects, among them transport, and establishment of a monitoring committee (Sunufm infos 2021).[24] This was followed in June 2021 by a delegation to Bamako from the Port of Dakar to discuss follow-ups to the Pacte de Saly (Maritimafrica 2021). Together, these ostensibly provide a further sign of political buy-in and cooperation frameworks for bilateral corridor cooperation.

At a national level, Senegal has adopted a *Plan Emergent Senegal*, the first covering 2014-18 and the second 2019-23. Both cite corridors as a means to achieving economic transformation, with the more recent plan focusing particularly on the potential gateway role of Dakar port, placing Senegal as a logistics and industrial hub. Proposals include promoting the Dakar-Bamako railway rehabilitation, Dakar port modernization and the creation of logistics platforms and hubs to leverage the flows of goods (République du Sénégal 2018).

In Mali, the government adopted a National Policy for Transport, Transport Infrastructure and 'Dis-enclaving' (PNTITD) in 2015 (République du Mali 2015). It describes road transport as "an essential service and indispensable support to economic development and poverty reduction", underlining the political importance attributed to road transporters (Ibid.).[25] Since 2015, the Malian government has reportedly invested nearly CFA400bn (more than € 600m) in road infrastructures (Ngueyap 2019).

Economic sanctions

One key challenge for bilateral relations relates to the ECOWAS sanctions on Mali, in place from January to July 2022. Those underlined the strategic significance to Mali of maintaining corridor options. While some dispute the effectiveness of sanctions in promoting change in Mali (Moderan et al. 2022), affected goods accounted for approximately half of Mali's total imports. Essential goods like food, pharmaceutical products, medical supplies and equipment, including materials for the control of COVID-19, petroleum products and electricity were exempt from sanctions (ECOWAS 2022), accounting for the other half of the total imports according to data published by ITC Trademap.[26] For non-essential goods Malian importers had to search for transport beyond the Dakar-Bamako corridor. Even if some Malian shippers already used the port of Nouakchott prior to ECOWAS sanctions, as Mauritania is not an ECOWAS member, it seems likely to have gained a larger share of Malian trade during the sanctions, possibly establishing new trade relations and practises in the process (Hoije and Mieu 2022). Though an ECOWAS member, Guinea-Conakry did not adhere to the sanctions, thus also making Conakry a potential beneficiary of the ECOWAS sanctions.

The position on sanctions revealed two (opposing) camps within ECOWAS. One, led by the presidents of Ghana, Nigeria and Niger advocated a strong stance in defence of upholding democratic principles, while another with Presidents such as Gnassingbé of Togo adopted a more pragmatic and conciliatory approach (Diallo 2022). President Sall of Senegal had also described the sanctions as unjust and illegal" (Diawara 2022). Despite disagreements, the sanctions were lifted in July 2022 (France24 2022).

Beyond formal agreements and policies, much of what takes place along corridors depends on political interests at the national level, and how these filter down to the ground-level in specific sectoral areas, discussed below.

[24] Other sectors included health, education.

[25] More recently, the Malian government adopted its *Strategic Framework for an Economic Relaunch and Sustainable Development 2019-2023*, with mention only once of "domestic and regional transport corridors" and referring to transport only in terms of infrastructure rather than as a sector, but referring to the PNTITD (République du Mali 2019).

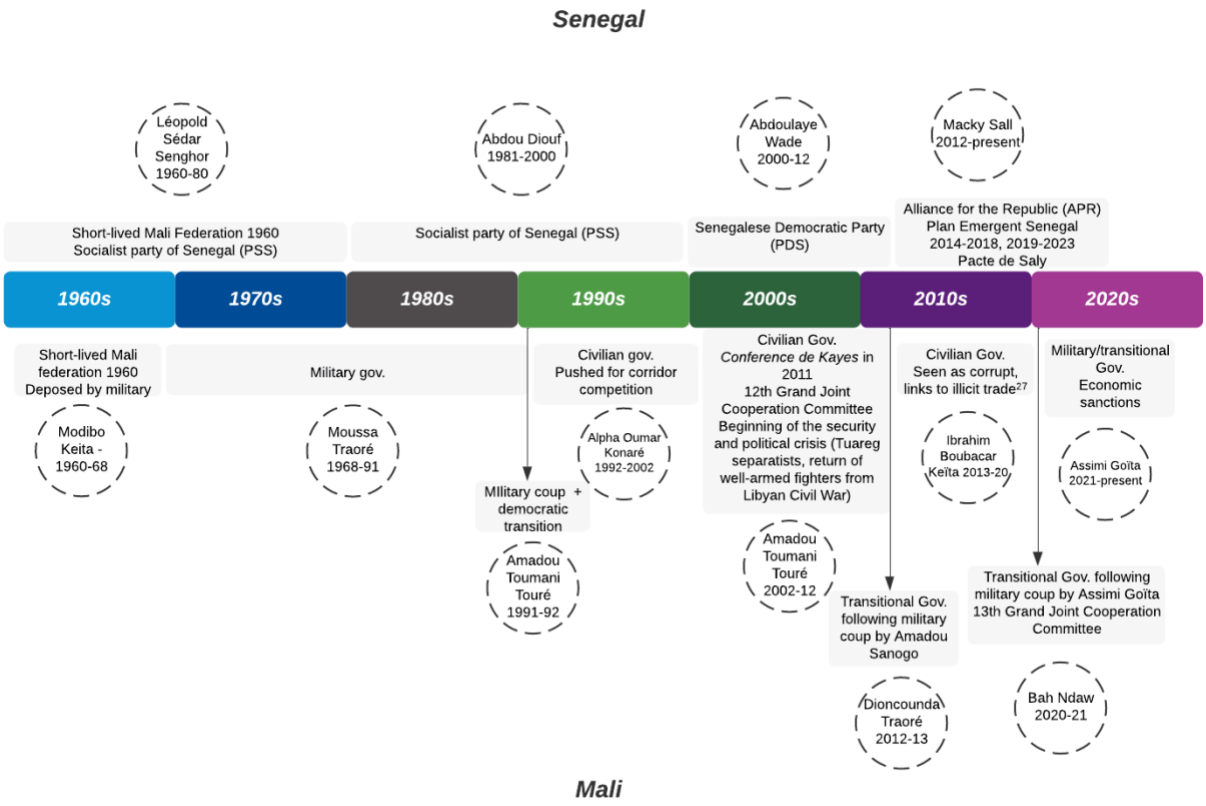
[26] See ITC trademap data here.

3.4 Political actors and interests

High level political actors and interests

As Figure 4 shows, political leadership changed in both Mali and Senegal soon after the *Conference de Kayes*, with multiple changes in government in Mali since then. Even if access to ports and imported basic goods has remained a priority for successive Malian governments, the lack of political continuity is unlikely to have helped the follow-up to Kayes. The apparent stalling of the recent *Pacte de Saly* may also relate to more complicated bilateral relations since 2020 - the Grand Joint Commission between Mali and Senegal held in March 2021 was during the short period of civilian government in Mali (see Figure 4). Nevertheless, Senegal also sought to mediate ECOWAS sanctions negotiations. The government was part of the ECOWAS Support Group for the Transition in Mali, while President Macky Sall sought to negotiate with Colonel Assimi Goita to overcome the regional sanctions regime that also harmed Senegal, not least given the impact on the Senegalese economy (Maliweb 2022).

Figure 4: Presidential timeline, domestic issues and bilateral relations (1960-present)



Source: (Authors)

While the presidency of Macky Sall has been associated with an outwards focus, manifest in the 'Plan Senegal Emergent, 2023' that places Senegal as a gateway to the region through the Dakar-Bamako corridor, this has not

[27] "Criminal networks are deeply embedded within Mali's formal and informal political and security structures, leveraging patronage networks and corruption to accomplish their goals and ensure impunity. While this status quo predated his presidency, Keïta oversaw a government that was deeply corrupt and maintained, rather than limited, links to actors engaged in illicit economies." (Herbert and Tinti 2020).

filtered through to the ways in which trade facilitation measures are implemented. Newspapers report close links between President Macky Sall and businessmen engaged in the port sector (Jeune Afrique 2020). At a minimum, these informal connections seem to align political and economic interests around the port and wider corridor transport, even as they also serve personal interests.

Though Mali is arguably quite different politically to Senegal, studies on the political economy of Mali describe how "real authority is located in-between the formal and the informal – that those who matter are those who combine positions in the formal and informal structure of the Malian political economy, so that they as 'big men' become nodal points in 'complex networks of informal governance". (Ba and Bøås 2017). This mix of formal and informal rules and relationships, while present in all countries and contexts, is key in understanding how different policy areas function, not least around the Dakar-Bamako corridor.

Beyond these high-level political actors, a wide range of representative organisations and actors are involved in the corridor - including port companies, Malian Warehouses in Senegal (EMASE) at the port, shippers' councils in both countries, chambers of commerce, transport companies, truck-driver unions, freight-forwarders, and the informal intermediaries who 'facilitate' the whole process of bureaucracy and/or matching shippers to transporters. Corridor actors also include the 'PDG' - *police, douanes et gendarmes* - the different police and customs forces who play a role along the road, overseeing administrative aspects but also applying discretionary charges. These different actors play different roles in the various aspects of the corridor, as discussed in the following sections, with several among them, such as the Directors of the Shippers' Councils and of the Port, explicitly political appointments. This wide array of technical and political interests clearly complicates efforts to align interests around trade times and costs along the corridor. As one interlocutor put it: "the corridor concerns everyone but nobody wants to fix it" (Private Sector Interview 2021). This may also relate to the different interests of port and transport sector actors.

Dakar Port actors and interests

Even if it is in the interests of PAD and the terminal concessionaires to maximise transit traffic and thus to make the corridor efficient, the rents created by high port handling charges clearly also affect interests. These relate to the terminal concessionaires but also the various organisations operating in and around the port.

Underlining the importance of the port in Dakar, the Director General of the PAD is a political appointment. The current Director was nominated by the Council of Ministers in 2017, his predecessor having become Presidential Adviser for the national *Plan Senegal Emergent,* another high-profile post (La Vie Sénégalaise 2017). However, while there were hopes that the new DG would bring a new, technocratic approach, he has been accused of nepotism, with a family member being given the post of overseeing truck parking around the port, another lucrative business (Diop 2020). Newspapers report close relations with businessmen such as Baïdy Agne, president of the National Business Council, a private sector representative group, the Union of Port Handling Companies in Senegal, and head of numerous businesses in the port handling, and transport sectors, not to mention construction and mining (Jeune Afrique 2020). At the same time, the new bulk terminal concession has been awarded to a Senegalese company, countering the dominance of foreign investors in the existing port concessions, but the concessionaire Sénégal Minergy Port Sa reportedly has family ties to the wife of President Sall, thereby continuing the sense expressed by many that politics and ports may be *too* closely aligned (Faye 2020).

Beyond the terminal operators, a wide range of actors determine the efficiency with which the port can work. The main interlocutor with customs on issues of trade and transit is COSEC, the Senegal Shipper's Council. Under the Ministry of Fisheries but with 80% of its board from the private sector, the head of COSEC is also a political appointee, who in turn sits on the board of the port. COSEC itself has a large reserve of funds at its disposal - ostensibly to promote training and support activities to help trade and transit, such as the single window system for shipping

administration, but which also include investment activities in warehouses, dry ports and real estate, and investments in a shipping line, COSAMA, engaged in regional transhipment to Conakry, for example (COSEC Interview 2021). COSEC receives its funding through its investments as well as fees charged on exports and imports.[28] This hybrid public-private actor then plays a key political and technical role in the smooth-running of the port but also the systems for freight sharing, discussed below, while seeking investment opportunities through trade along the corridor.

The *Communauté des Acteurs Portuaire* (CAP) was established in 1994 for this community of port stakeholders to help resolve tensions and disputes. It brings together terminal concessionaires as well as the PAD, transporters, forwarders and other actors to the table with the goal of maintaining Dakar's prominent status in Mali, and other regional trade. The fact that Malian Warehouses (EMASE) is part of the CAP also gives them a voice in how the port is managed among the range of different actors. Though wielding little formal power, and sometimes struggling to align interests among such diverse actors, - some interlocutors suggest that the CAP would work better if led by the Port of Dakar (Port Interview 2021) - the model nonetheless provides a platform for addressing conflicts without having to use the legal system and was reportedly reinvigorated after the strikes in 2020 that led to the *Pacte de Saly* (CAP Interview 2021).

Overall then, in the face of rising port congestion, some but limited regional port competition and high port handling charges, there seems to be political and commercial interest in expanding port investments outside Dakar. At the same time, Malian stakeholders maintain an interest in keeping their corridor options open, while high corridor costs arguably also relate to how goods are distributed and transported *along* the corridor, where the CAP is limited in how much authority it has beyond an advocacy role.

Apart from the dynamics at the port, there are also a range of actors operating *along* the corridor, discussed next.

Transport actors and interests

In both Senegal as well as Mali, the trucking sector is dominated by a large number of small-scale and informal operators who are not professionally trained, and either lacking the authorisation to operate or not complying to (inter)national standards to operate (Hamilton 2010, WB 2018, Bove et al. 2018). Only a few firms exist with a fleet of more than a handful of trucks.

Even so, overall, Malian transporters are largely seen as powerful actors through their unions, and managing to control the freight distribution process. Senegalese truckers largely do not hold much power in terms of access to corridor traffic. Some talk of being able to carry cement now, as Malian transporters do not find it profitable enough relative to other goods, though reportedly Mali was considering reimposing the quota in this sector too (Truckers union interview, Road transport interview 2021). At the same time, domestic freight is reportedly not enough to keep Senegalese transport companies afloat, thus they seek access to Mali-bound transit goods (Truckers union interview, Road transport interview 2021).

On the other hand, Malian transporters and indeed the public sector have made major investments in their national road transport fleet which is relatively new and well maintained compared to Senegal, where 85% of the fleet is more than 10 years old. Beyond freight access this gives Malian trucks a competitive edge over Senegalese trucks in terms of reliability (Bove at al. 2018). Nonetheless, given the relatively large capacity of the Malian fleet (supply) compared to the domestic needs (demand), there is stiff competition among transporters, putting further pressure on margins, even if this is not then reflected in lower transport prices for trade along the corridor as a whole (AfDB

[28] The COSEC charges 0,40% of the FOB value of exports and re-exports and 10,000FCFA (approximately € 15) per import consignment (République du Sénégal 2022).

2014). This relates to the low entry barriers to operating in road transport - 60% of transporters operating on this corridor have just one truck (Bove et al. 2018). This and the informal system of freight allocation along the chain make it difficult to promote collective action and push for reforms, such as use of the electronic freight marketplace, in the name of transport efficiency.

All of this suggests that the power to dominate Dakar-Bamako corridor transport is very much with Malian transporters, and the network of actors around the port. While their interest may be to reduce hassles along the road, their main interest is to maintain access to freight and if possible to carry as much as possible in one journey (see below on axle loads).

4. Sectoral factors shaping the dynamics

While the above sections provide an overview of the structural and institutional factors affecting the corridor and some of the key actors around regional port dynamics, this section zooms in on some specific areas of the corridor, where different actors and factors play out differently.

4.1 Freight sharing

Landlocked countries in the Sahel, including Mali, often have a quota system governing how transit freight is shared between landlocked country transport fleets and those of coastal countries. For the Dakar-Bamako corridor, a bilateral agreement stipulates that two-thirds of transit consignments be allocated to Malian transporters and one-third for Senegalese (with all hydrocarbons allocated to Malian transporters).[29] EMASE, are responsible for monitoring and applying the quota as well as providing port public services and facilities for Mali-related trade and avoiding undue delays in the clearing of goods (Touré 2020). This role is ostensibly played by COSEC, the Senegalese Shipper's Council on the Senegalese side.

The set of formal rules around freight allocation, combined with the recent modernisation of the fleet in Mali and informal practices, means that in practice Malian trucks carry almost 90% of the freight on the corridor (Bove et al. 2018). This has reportedly led Senegalese transporters to buy Mali-registered trucks, in order to access Mali-bound freight (Port Interview 2021), while Senegalese transporters have reportedly never managed to fulfil their third of freight (Truckers Union Interview 2021), though it is not clear if this is due to lack of capacity or lack of access to freight.

Although formal rules exist, the way they are applied is subject to a range of different interests. Though EMASE is charged with overseeing the use of the quota, along with COSEC on the Senegalese side, informal 'runners', called "coxeurs", or 'courtiers' also have a lot of influence in allocating freight to trucks in non-transparent ways, often working alongside individual freight-forwarders and collecting informal fees (Truckers Union Senegal, Customs Agents Union Mali Interview 2021). They are partly helped by the fact that trucks must park away from the port in order to avoid congestion at the port. As such, the go-betweens have an overview of what trucks are where, and what goods need transported, representing a powerful informal network (ibid) and an additional cost on top of fees paid to EMASE and COSEC, thus contributing to higher overall corridor transport prices (WB 2019).

This set of freight sharing arrangements is thought to be bad for corridor efficiency, as transport companies do not compete on the basis of prices and quality of service. There are ongoing efforts by the Senegalese Shippers' Council

[29] Freight transport in the corridor is governed by the Protocole d'Accord relatif aux transports routiers entre le Sénégal et le Mali. The MoU also sets out rules regarding total vehicle weight and dimension limits, inter-state insurance requirements, road controls, and other technical visit and documentation requirements (Bove et al. 2018).

(COSEC) to introduce an electronic freight marketplace, a so-called 'bourse de fret'. This is meant to bring transparency to the way cargo is allocated to truckers. However, this remains at a pilot stage, offering a view of freight available but not operating as a commercial platform to bid or distribute among transporters (COSEC Interview 2021). Further, the online platform is not being used by informal actors who currently benefit from their own knowledge of freight availability (COSEC, Port, Truckers Union Interview 2021). As one interviewee put it, 'digitalisation means transparency', and not all actors want such transparency if their current incomes depend on the knowledge that others do not have (COSEC Interview 2021).

4.2 Inter-state transit

One area of corridor dynamics where Senegalese interests seem to dominate relate to implementation of the ISRT - the Interstate Regime for Transit Goods. This was adopted by ECOWAS in 1982 as a legal instrument to safeguard goods in transit from point of loading (e.g. Dakar) to their destination (e.g. Bamako) without harassment or delays, while also avoiding goods being diverted into the domestic market. That is, it is intended to avoid goods being declared for Mali, thus avoiding import taxes and charges on entry into Senegal, but then being diverted into the Senegalese and regional market. Application of the ISRT has been a stated priority since the 1980s, with renewed efforts in 2008 with external support (WB 2008), and again following the *Conference de Kayes* with its official launch in 2013 (Diallo 2013). But it still faces implementation challenges.

The ISRT combines a sealing system to ensure that transit trucks do not discharge cargo inside Senegal, with a payment to a guarantee fund to cover any loss of import duty revenues should the transit goods indeed be diverted, discharged and sold before exiting the country. However, application of the ISRT has been uneven from the start, undermining the efficiency of the corridor. One part of this relates to the deposit or payment, another to sealing the goods.

The ISRT implies paying a sum of 0,5% of the value of the merchandise into a revenue guarantee fund, to be used to replace any lost revenues from goods being diverted. This is supposed to be shared between the Mali and Senegalese Chambers of Commerce and, where not used to replace lost revenues, used for transport-related uses such as provision of weighbridge (or indeed customs escorts in Mali).

However, in Senegal, the pre-existing S110 system also remains - indeed the Senegal customs website only mentions the S110, and not the ISRT. Instead of a payment, this instead requires a refundable bank deposit (République du Sénégal 2022), which is paid by freight forwarders - not the importer. As such, the 0.5% fee for the ISRT is seen as an additional cost, unlike the returnable deposit made by forwarders under the previous system. This is despite the fact that the new system was meant to be a way to lower the entry barriers to small freight forwarders who were unable to carry the cost of multiple large deposits under the S110 system. As such, the ISRT charge is resisted not just by importers, but also the freight forwarders who would face more competition under the ISRT (Consultant Interview). This alignment of interests between importers and freight forwarders means that the ISRT is essentially not applied in Senegal, though in Mali, the Chamber of Commerce has successfully implemented and manages the ISRT, charging 0,25% on the value of goods in transit (half of the foreseen 0.5%).

Implementation of the ISRT has also been held up due to the nature of the trucks circulation and the need to seal these. According to a GIZ (2015) baseline study, about 70% of the trucks in circulation on the corridor are open trucks that cannot be sealed by customs, implying that they do not meet the technical requirements of the ISRT.[30] To address this, it was agreed to use a physical badge for open-back trucks, known as a 'macaron', to signal that all

[30] *Etude baseline sur la Mise en Oeuvre du TRIE bilatérale entre le Sénégal et le Mali* (GIZ 2015). This study also lays out some of the other binding challenges to using the ISRT between the two countries.

verification procedures have taken place prior to departure and that it should benefit from free passage, combined with a closing system to tie-down and seal goods to limit the possibility of diversion of goods, while trucks could also be given a GPS emitter to track the route taken.

While according to formal policy customs escorts are meant to accompany only specific goods, and the 'macaron' system was intended to do away with the need for a customs escort, the imposition of a customs escort payment remains, even if there is no actual physical escort accompanying the trucks (Several interviews, GIZ 2015). The fee is charged at FCFA145,000 (€222) per trip, where FCFA75,000 relates to the escort itself, and FCFA70,000 is a payment for 'supplementary work' carried out by the customs officers involved (UNCTAD 2022). Firms report that all shipments must pay these fees (Chamber of Commerce in Mali and Senegal Interview 2022), while official documentation simply says that customs 'can require' that goods be escorted (République du Sénégal 2003). Interviewees talk of 400-500 trucks crossing the border per day from Senegal to Mali, implying some € 90,000-110,000 per day in customs escort fees. According to a report by AfDB in 2015, based on the data published by OPA, the cost of customs escorts was estimated around FCFA7.8-10.4bn (or € 12m-16m), four times higher than the bribes collected on the corridor (AfDB 2015). Interviewees state that the fees are channelled to fund the Customs Social Fund (République du Sénégal 2012; Chamber of Commerce Interview 2021).

This has repercussions also for the "Système Interconnecté de Gestion des Marchandises en Transit (SIGMAT)" - a pilot project to connect customs data between Senegal and Mali (GIZ 2018). While the systems are reportedly in place for SIGMAT to work, they also face resistance, and a preference for the pre-existing paper system. Having electronic customs clearance would create clear losers in the form of importers seeking to under-report imports, the customs agents who engage and earn money from the practice, as well as freight forwarders and others who until now made a living from 'facilitating' the paperwork at the border.

Overall, the ISRT is therefore not being applied in practice as it is envisaged on paper, and as it has been agreed between the two states. On closer inspection, rather than technical hurdles or 'lack of information', this rather seems related to different types of resistance: from the private sector and freight forwarders; from the customs service; and from those who stand to lose from a more transparent, electronic system.

Another part of the above issues, where the formal and informal systems in place discourage container transport, is also at the heart of the difficulty of implementing regional axle load regulations.

4.3 Axle load regulations

Given the challenges of obtaining freight, the levels of harassment along the corridor, and the costs involved in a corridor journey, truckers seek to carry as much as possible in one single trip (COSEC, Truckers Union Interview 2021). While this makes sense from an individual trucker perspective, it leads to challenges in implementing UEMOA Reg. 14.

UEMOA's Regulation 14 seeks to preserve road infrastructure and contribute to the sustainability of the (infrastructure) investments by determining the axle-load limits of trucks transporting goods within the region.[31] Though less about facilitating trade, the application (or not) of the rule impacts on how goods are transported along the corridor, with overloading frequent, thus offering opportunities for corruption at weighbridges (Byiers et al. 2014).

[31] According to Karaki and Verhaeghe (2017) the regulation was passed in order to avoid the threat of withdrawal of EU funding for infrastructures which were negatively affected due to overloading, and reinforce the axle limit under the ISRT, which was never properly implemented, by providing further guidance for implementation in terms of specified rules, tables and fines.

In practice, multiple containers can be 'destuffed' onto one truck, allowing transporters to earn more for one trip.[32] This is especially frequent among own-account operators who are restricted in their ability to obtain contracts and seek to take advantage of any trips that arise. Both the Malian private and public sectors have been investing in a new truck fleet, whale transporters have also invested in adapting these to allow them to carry additional weight (Truckers unions in Senegal and Mali Interview 2021). Further, at weighbridges, without a place to offload goods, 'informal payments' to avoid time-consuming checks are the norm (Truckers Union, Chamber of Commerce Interview 2021).

Beyond the incentive to lower costs by transporting a larger amount of cargo, containerisation is disincentivised by the fact that a guarantee of FCFA1m must be paid in order to carry a container beyond the port, where its return is time-bound to 20 days. The risk of delays and lack of outgoing cargo mean truckers are often unable to return the container on time and thus forego their guarantee (Private firm Interview 2021). This then adds to the incentive to destuff containers, further contributing to axle overloading.

Beyond issues of intentional overloading, truck-drivers also complain of inconsistencies between the weighbridges, where 20 tonnes can end up being 22 tonnes at the weighbridge further along the road (Truck driver Interview 2021). The lack of weighbridge harmonisation within and between the two countries is also confirmed by other interviewees (e.g. Chamber of Commerce Interview 2021).

Although the *Conference de Kayes, and the Pacte de Saly* both talk of eliminating informal payments and implementing UEMOA Reg.14, and while this would encourage greater containerisation, security and arguably efficiency along the corridor, as this section suggests, implementation of such policies goes far beyond simple instructions to implement. This represents just one of a wider array of corridor harassments along the corridor, all representing non-tariff barriers (NTBs) but also complex problems to address given the array of interests and incentives at play.

4.4 NTBs & transport harassment

The state of harassment

According to agreements going back to the Kayes Conference, based on an UEMOA directive (UEMOA 2005; UEMOA 2005a), there should only be three checkpoints for goods leaving Dakar port for Bamako: one on departure, one at the border, and one at arrival. If the array of mechanisms discussed above were fully implemented, this might be considered a possibility. But Mali on average has 4 checkpoints per 100km vis-a-vis 2 in Senegal (Zoma 2019), totalling 23 checkpoints in the whole corridor (FW 2021). However, even if the Malian side of the corridor is considered to entail less harassment (e.g. Chamber of Commerce Interview 2021), the informal ways used to get around each of the formal rules underlines the wider challenge of addressing these additional trade and transport costs. While some of these payments are related to axle overloading, discussed above, there are additional illegitimate charges made - interviewees cite as an example that Malian trucks are charged FCFA 1,000 at the border which, although small, should not exist (Private firms, Chambers of Commerce Interview 2021) while trucks are regularly charged to pass through road checkpoints.

Different interviewees cite different costs associated with informal payments, mostly below those cited above. One company exporting mangoes and peppers from Mali cited paying FCFA750,000 (€1145) of 'tracasseries' to get their shipment to Dakar port (Private firm Interview 2021). This was additional to the cost of transport, FCFA2.5m (€3800)

[32] This is not restricted to this corridor alone, and exists in other countries in the region e.g. the Gambia (UNCTAD 2013).

and FCFA450,000-500,000 (€687-783) of money for driver costs incurred en route (Ibid.). Similarly, a group of women traders cited approximately FCFA700,000 (€1068) of informal payments (Women traders' association in Mali Interview 2021). This is higher than the estimates given by interviewed truck drivers, who rather cited informal payments of FCFA200,000-250000 (€305-380) and FCFA300,000 (€458) for journey costs for food and fuel.

As discussed above, the average amount of illicit payments per trip and per corridor in the UEMOA region as a whole reportedly increased in 2019, with the highest amounts being recorded along the Dakar-Bamako corridor at FCFA175,000 (approximately €270) (OPA 2019). Bribes can reportedly represent 32% of the transport costs for cattle from Mali along the corridor to Dakar (Gourichon et Demanet 2017). Harassment along the corridor starting from Koutiala (east of Bamako) reportedly raises the cost of transporting maize by up to 43%. Eliminating these costs would raise the income for collectors in Segou by 14% and that of wholesalers in Bamako by 18% (Ibid.). Though these costs vary a lot, and cattle and maize may be special cases, the implications are clear for transport costs and the potential benefits of eliminating such "tracasseries".

Even if, as one interviewee suggested, truck-drivers have an interest in exaggerating the level of informal payments to access additional 'trip money' (Private firm Interview 2021), the range of estimates are all relatively consistent.

Although the above data is necessarily approximative, such information is gathered regionally by the *Observatoire de Pratique Anormales* (OPA) (Observatory of Abnormal Practices), set up under UEMOA in 2005 with US funding (Stalmans 2013). This was created to monitor the number of transport checkpoints along the main road corridors in the region, illicit charges made, and the delays induced by these checks. Each member state has assigned an agency to monitor this and to provide a contact person in order to provide support to transporters facing challenges (Chamber of Commerce in Senegal and Mali Interview 2021). In the past, regular reports allowed stakeholders to compare the different corridors in the region.

However, whereas the OPA reports were previously discussed at the political level, this reportedly no longer takes place, with limited reported interest from both the Customs Service and the Directorate of Transport (Chamber of Commerce in Senegal Interview 2021). Moreover, with the end of an EU-funded project to put these reports together, it remains unclear how such information will be generated in the future. Discontinuity of initiatives owing to funding by development partners was raised as a significant shortcoming of efforts to raise awareness about barriers to trade and transport on the corridor, though this may also signal a low level of priority placed on the issue by governments in the region.[33]

At the same time, both ECOWAS and UEMOA have their own NTB reporting mechanisms (Borderless Alliance 2022; UEMOA 2022). While this theoretically offers traders in Senegal and Mali two reporting mechanisms, it is unclear whether and how these mechanisms are aligned or interact, nor how quickly reported problems can be resolved. The continuing existence, indeed increase, of the challenges in terms of harassment and bribery along the Dakar-Bamako corridor, suggests relatively limited impact.

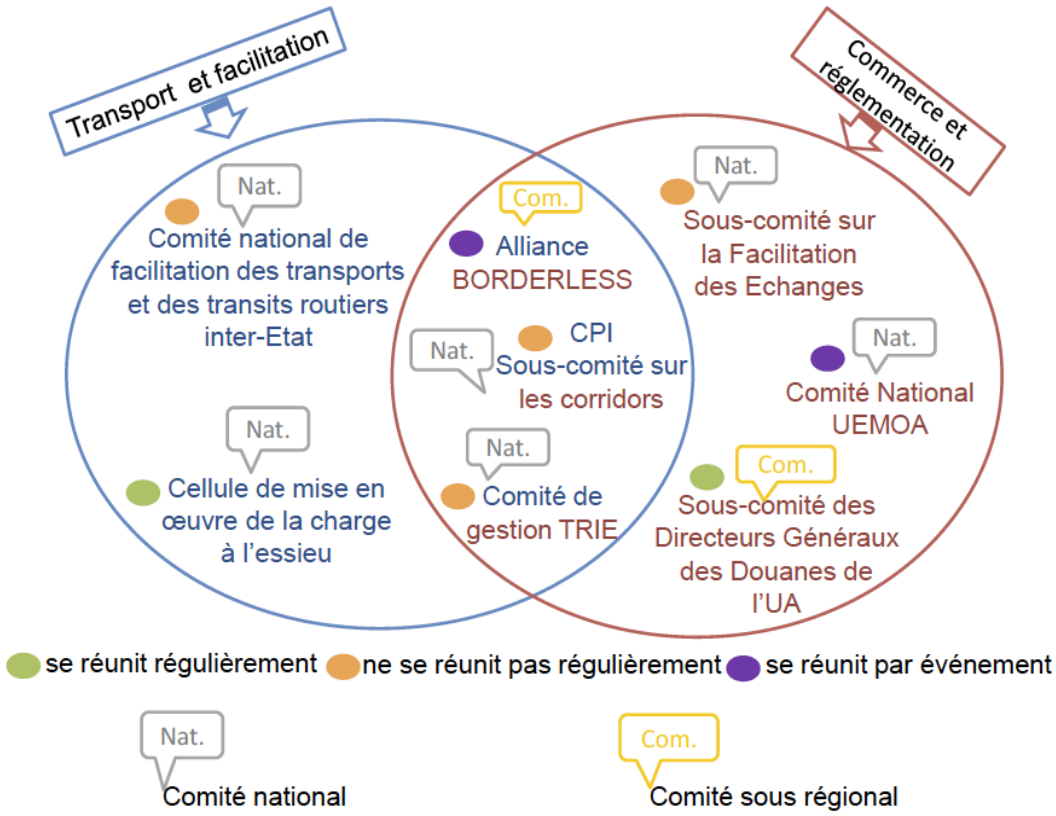
The Senegalese Shippers' Council COSEC also seeks to oversee corridor transport and has invested in another form of NTB-reporting mechanism: TRACE - Traitement des Réclamations des Chargeurs Entreprises (Treatment of Transport Company Complaints). This may risk duplication with the existing mechanisms cited above while interviewees were doubtful of how and whether it would work (PAD, Truckers Union, Chamber of Commerce Interview 2021). COSEC have also planned investments in rest and parking places seen as necessary for the safety of

[33] For example, while the border information centres, with funding from USAID and implemented by Borderless Alliance were very helpful for drivers, they no longer exist. This is somewhat taken up by CILSS though their focus is on agricultural trade. On the other hand, COSEC's TRACE initiative deals more with shippers than drivers themselves.

drivers as well as to address the fines (or bribes) paid by truckers for stopping to rest on the roadside along the road. The parking places would essentially formalise these payments but include rest services.

The above initiatives complement a wider range of committees and organisations that are mandated to promote the smooth movement of goods along the Dakar-Bamako corridor. These are summarised in Figure 5. They can broadly be divided into those that look at transport facilitation (left circle) and another group that looks at trade and related regulation (right circle). These committees exist at different levels i.e. regional ("Com.") and national ("Nat."), with participation from member-based organisations. For example, the national transport facilitation and inter-state transit committee includes the Union of Malian Road Transport Drivers (Syndicat des Chauffeurs et Conducteurs Routiers de Mali - SYNCOR) as well as EMASE, thereby ensuring a broad-based representation. Though all of these formal mechanisms are in place, as Figure 3 shows, only those in green met regularly when the study was carried out in 2015. According to interviews for this study, the Senegalese national trade facilitation committee had not met in two years (Chamber of Commerce Interview 2021), though this was arguably also related to COVID-19 related restrictions.

Figure 5: A mapping of institutions that look at trade, transport and their facilitation[34]



Source: GIZ 2015b

Several interviewees talk about the need for a corridor committee to coordinate the different actors along the corridor (e.g. PAD, CAP, Chambers of Commerce Interviews 2021). After the Kayes Conference, something along these lines was reportedly established in the form of joint committees, though those appear to have lost traction.

[34] Translation: "Nat." refers to national level committees; "Com." refers to regional committees; those in green "meet regularly"; in orange do not meet regularly' and in purple "meet for events".

Efforts have reportedly been made to follow up on the *Pacte de Saly.* The Mali Chamber of Commerce is reportedly working with EMASE to monitor progress, while in June 2021 a delegation from Dakar Port also visited Bamako to discuss progress with implementation (Maritimafrica 2021). However, much of this was thrown into disarray by the sanctions imposed on Mali, thus undermining trade and efforts to facilitate transport along the corridor.

Checkpoints and security

One challenge for eliminating road checkpoints, beyond the non-implementation of the ISRT and axle-overloading, is that of security concerns. Nevertheless, the current count of 20+ checkpoints is seen by most actors as excessive, as is also shown by the transport strike held in December 2021, explicitly complaining about corruption and harassment, insecurity in Mali, as well as the difficulty brought by UEMOA Reg.14 (LeQuotidien 2021a; TV5MONDE 2021). On the other hand, actors exercising oversight in the Dakar-Bamako corridor (customs agents, border officials, port authorities etc.) view the extra/informal payments as some form of a premium for the relatively safe passage that the corridor affords customers, transporters and truckers (PAD Interview 2021).

A large chunk of the trade along this corridor is in fact informal, which has an impact on actors' interests and incentives. According to Shaw and Reitano (2014), the transport of goods between North Africa into Mali is often used to camouflage the smuggling in arms, drugs as well as other illicit goods.[35] While smuggling is thriving with the instability in Northern Mali, the perceptions of insecurity permeate further south, including along the Dakar-Bamako corridor (Scheele 2012).[36] This network of smuggling then interacts with the wider dynamics of transport and corruption, as well as wider politics. According to some reports, "criminal networks are deeply embedded within Mali's formal and informal political and security structures, leveraging patronage networks and corruption to accomplish their goals and ensure impunity" (Herbert and Tinti 2020). Interviewees also cite greater security concerns on the Malian side since the military coup, though less harassment for bribes than in Senegal (Chamber of Commerce Interview 2021).

In conclusion, trade flows along the Dakar-Bamako Corridor are arguably supported through weak application of the rules supposed to govern transport. Bribes are sought under many pretexts - even trucks with correct documentation are harassed for bribes, which according to some, takes away the incentive to abide by rules. In trying to explain the political economy of roadblock, Schouten (2019) frames them as "devices through which the capacity to disrupt circulation can be translated into other forms of power, financial or political" (Schouten 2019). Again, this highlights the importance of incentives beyond lowering transport times and costs.

5. Summary and implications

In spite of numerous high-level political statements to address the barriers to trade and transport along the Dakar-Bamako corridor, going back at least to the *Conference de Kayes* in 2011, many of the same problems persist. This paper seeks to analyse the different actors and factors that shape trade and transport dynamics along this corridor as a means to better identify obstacles and openings to change. The reasoning is that understanding the political, in addition to the technical, drivers can in turn open the way for reform that is also politically feasible, as opposed to technically-sound proposals that disregard the related politics.

[35] There is often an intersection between legal and illegal forms of trading, though different goods require different levels of secrecy - smuggling of commodities may be more open, whereas the smuggling of drugs or arms trafficking may require greater secrecy and hence are not openly smuggled (Shaw and Reitano 2014).

[36] Indeed for Mali's business community, major perceived constraints to their business is political instability which is closely followed by corruption, and competition from informality (WB 2018). As Shaw and Reitano (2014) show, these are closely interlinked.

Although the 2021 *Pact de De Saly* identifies 58 different points for action among port actors, this paper cannot study all of these. Instead it looks at the structural factors underpinning corridor relations and high-level institutional frameworks and relationships around the corridor before zooming into five specific corridor-related problem areas: port ownership and competition; freight distribution mechanisms; interstate transit procedures; application of regional axle load regulations; and harassment and other NTBs.

Overall, the paper seeks to situate the transport sector and the five problem areas within the wider context of both countries, but also the multiple actors and interests that play out to promote or block reform. As Lombard and Benjamin (2015) points out, the transport sector is a representation of the external influences (e.g. from Malian shippers) as well as local specificities (e.g. path dependence - the initial dependence on transporting groundnuts) which is also shaped by national policies. As such, the transport sector then represents an interaction between different systems at the local as well as regional level. The system is agile in that it adapts to the existing realities, with overlapping roles between transporters, drivers and shippers. This underlines the need to better understand the actors and interests at play around the different reform areas.

Clear winners from corridor reforms such as Malian consumers, are unlikely to be well-organised or wield enough influence to alter incentives of other more entrenched actors, while the interests of other influential actors, even at a political level, may be limited if powerful groups have limited gains or stand to lose from reforms. It is therefore necessary to identify pathways to change that are both technically sound as well as politically feasible. The following summarises the main conclusions from each of the above sections, with implications for policymakers and support programmes.

1. Structural factors

There are numerous historical and socio-cultural factors that bind the Mali and Senegal economies and peoples together, in some ways providing a solid basis for exchange and cooperation along the Dakar-Bamako corridor. While Dakar is not the closest or cheapest port, it benefited from insecurity in Côte d'Ivoire in the early 2000s, where Abidjan was the main port for Mali since independence, and has managed to retain its dominance. The combination of structural factors still favour cooperation around the Dakar-Bamako corridor.

Implications

- By definition, structural factors are hard to alter. Although the recent violence in Mali and resulting regional sanctions have been a challenge for improving transport dynamics, the underlying structural factors are clearly supportive of further future corridor cooperation.
- That said, the impact of the recently ended sanctions has still to be understood, and may affect the viability of certain initiatives to expand the port of Dakar

2. External factors

Insecurity in the region has been rising, and as such remains a key factor in determining the strategy of Malian stakeholders to maintain their options in using different corridors. Port competition in the region is also rising. As Mali looks for alternatives, other corridor countries regularly court Malian shippers for custom and the recent economic sanctions further obliged Malian traders to use other routes for goods beyond basic necessities.

Implications

- As with structural factors, external factors cannot be altered, but must be adapted to. The challenge will be to balance security concerns, for example at road checkpoints, with facilitating trade flows.
- Senegalese actors are conscious of the rising port competition, that may be a useful stimulus for greater coordination among port and corridor actors to ensure the Dakar-Bamako corridor maintains its dominant status for Malian trade.

3. High level institutions & relations

The above structural factors have helped lead to the institutional agreements to address corridor transport challenges. With multiple changes of government in Mali since 2011, the *Pacte de Saly* of 2020 ostensibly offers a basis, with multiple existing national and regional committees, to monitor and follow-up on progress.

However, the connection between high-level political relations and implementation faces multiple hurdles as affected actors seek to maintain the status quo. These are discussed in more detail in relation to specific 'problem areas' below. In general terms, multiple organisations are involved in the working of the corridor - transporters, unions of drivers, private sector organisations, firms, shipping lines, customs, port, railway etc. While this means that power is not overly concentrated in a few hands, numerous actors have an interest in maintaining existing rents or face difficulties with acting collectively.

Implications

- State-to-State relations between Senegal and Mali are cordial, with each understanding the strategic relevance of the other. This may be why President Sall was able to play a mediating role with ECOWAS on the issue of sanctions.
- Problem-identification is not lacking, as the *Pacte de Saly* illustrates. Instead, as this paper highlights, the challenge is to understand the vested interests around each of the reform areas and seek to enable coalition building around them, where there is the ability and interest to address them, and discussions can be held on how to alter existing incentives, or to adapt reforms to take account of these.
- Any new efforts should focus on the *function* of existing committees and joint meetings rather than their institutional *form.* There are calls for a Corridor Authority, though following this path may risk being a distraction from efforts to maintain and strengthen the Observatoire de Pratiques Anormales, for example, or reinvigorating the joint committees intended to follow up from Kayes and Saly.

4. Port dynamics

Although the multiple corridor options open to Mali ostensibly introduce competition among regional ports, and the Malian Warehouses can play a role in maintaining that, Dakar Port differs from most in the region by having a terminal concession that is outside the existing regional duopoly. Though port charges remain high, the alignment of political interest with that of the concessionaire, mean that Dakar Port is seen as a political priority, with political weight, that is leading to new investments within and around Dakar Port. The Port Actors Community (CAP) forum for all actors engaged in the port also provides a useful forum for addressing challenges though it has less influence over the corridor, and arguably also struggles to bear authority within the port.

Implications

- While some criticise the CAP as lacking political clout, its current structure may actually be good to balance interests. However, if this blocks reform progress, a more explicit framework of mutual accountability may be required to make progress on the issues raised in the *Pacte de Saly.*
- One way forward may be to create problem-focused groups from within the CAP to further investigate and report back on the underlying interests and incentives that block the proposed reforms, much like this paper has tried to do at a more general level. Though already somewhat attempted in 2011 after the Conference de Kayes, these could also look explicitly at where actors stand to lose out, while jointly seeking alternative ways to offset losses or address concerns.

5. Freight sharing

The quota system governing hinterland-bound trade clearly favours Malian truckers, while the use of 'coxeurs' or 'courtiers' also undermines transparency. At the same time, it is clear that Malian transporters have a strong position vis-a-vis their Senegalese counterparts, given the significant levels of public and private investments in the fleet.

Implications

- The fact that COSEC is seeking to introduce the online marketplace system may be viewed with suspicion by Malian actors, thus requiring a joint approach and explicit efforts to address such doubts. Given the importance of EMASE in the freight distribution process, and the dominance of Malian truckers both in terms of the quota and in practice, the electronic marketplace approach should be joint, and address concerns of both sides.
- A joint approach then should begin with understanding what specific problem the electronic marketplace seeks to address, and indeed whether this is recognised by both sides. Progress may also depend on issues of final ownership of the platform and the information therein.

6. Inter-state transit

The ISRT represents a complex interaction of multiple actors, interests and related corridor problems. The crux of the issue, as our analysis suggests, relates to resistance from importers and freight-forwarders, and the use of the funds raised from customs escorts to finance the customs social fund. Along with issues of truck-overloading, this encourages transporters to use the old system, thus undermining the ISRT benefits of one document and less need for road checkpoints. Full compliance with the ISRT would remove this source of funding.

Implications

- While studies suggest the need for more capacity building and information, the issue of customs escort fees seems to be a core issue, with alternative ways to financing the customs social fund a necessary exercise to undertake.
- For change to happen here it may require corridor and port coalitions to more actively push for removal of these fees.
- Further examination of the actors and interests around the ISRT and its S110 predecessor are necessary to proceed with fading out the S110. Lessons might be learned from other countries in the region where this was successful.

7. Axle load regulations

The challenge of implementing UEMOA Reg.14 across the region is well-known. This too involves multiple, inter-related aspects, including the reluctance of transporters to use containers due to the risk of losing their container guarantee deposit; the structure of the transport market that implies limited numbers of trips, and thus encourages truck overloading; and the possibility of passing weighbridges with an overloaded truck through bribe payments.

Further, the lack of harmonisation of weighbridges undermines trust in their operations, making bribe extraction a problem even for trucks that are ostensibly within the rules.

Implications

- It would be useful to explore further the incentives and informal relations at play between the chambers of commerce in Mali and Senegal, both responsible for their respective weighbridges, and seek to ensure a harmonised system. This may help establish trust for those transporters operating within the rules.
- Given the impracticality of offloading trucks that are found to be overweight, a formal charge might be established akin to excess luggage at an airport, on a rising scale, thus making payments formal while discouraging overloading.
- Discussions with container owners around the deposit are not new but renewed efforts to understand their concern and how to align that with longer turnaround times may help in finding a solution.

8. NTBs & transport harassment

As a consequence of the combination of above 'problems' as well as the actions and behaviour of different actors, the 'informal costs' or bribes associated with transport along the Dakar-Bamako corridor appear to be high and rising. Numerous initiatives have been set up to monitor checkpoints, costs and time lost, providing important information to help pressure for change. Though externally financed, these have provided an important basis for the private sector to call for reforms, and until recently, received political attention. However, both the funding for this and the political attention received seem to be on the decline in recent years, in spite of the continuing related problems and frequent transport sector strikes.

At the same time, the proliferation of different mechanisms at the UEMOA, ECOWAS and country level may create duplication of efforts. As discussed here, COSEC is launching its TRACE system for shippers while OPA still exists with a hotline for drivers to address issues, as well as the UEMOA and ECOWAS NTB Reporting mechanisms.

Though a very different issue than policy implementation, investments in the railway are likely to bring significant benefits to consumers in both countries, and may find favour with investors seeking 'green' investments. However, incentives here too are not necessarily aligned - while there is an interest on the Senegalese side, it is feared that the same is not the case on the Malian side because of the influence of powerful (road) transporters. There is a sense on the Senegalese side that any movement towards developing the railway would be perceived as against the interests of transporters in Mali and they will simply choose to move their business elsewhere. Another instance of unequal negotiating power is that between shipping lines and shippers (i.e. firms) where the former wields much power to dictate the prices.

Implications

- Support by development partners has had a direct impact on monitoring initiatives and may be required to re-ignite these, even if remaining under the purview of regional bodies such as UEMOA or ECOWAS to ensure

some regional comparability. The past experiences and possibilities of resurrecting such support and raising its political profile should be explored.

- Many of the issues discussed under points 1 to 6 would help address bribery and harassment along the corridor.

General

Overall, transport along the Dakar-Bamako corridor has strategic importance for Mali, being a landlocked country, but efficiency is not a primary concern among the majority of corridor actors. Not only are several actors involved in making a living out of this relatively low barrier-to-entry sector, but there are also private and public sector actors who capture rents in the sector in both Senegal and Mali. Inclusiveness seems to be a more important consideration than efficiency in a context where there are limited jobs to make a living. These interests also mean that there are several potential losers from modernisation of the sector, even though it is technically the best option.

Reforms bring about a change in the distribution of resources, and therefore different reforms affect different people differently. In several cases, there is a need to carefully assess how incentives can be aligned so as to bring desirable outcomes. This paper shows how interests may diverge on some of the reforms. However, efforts might be made to align these by designing policy-oriented options so that incentives can be altered or pointing out where interventions need to be adapted to the socio-political realities (e.g. rent seeking within the sector) among other things. Importantly what the analysis shows is the need for more problem-focused efforts to target key corridor bottlenecks, building on coalitions of relevant actors and with mutual accountability for results.

Further investments in field research, to understand the use of different strategies by actors operating on the corridor and the interactions therein may also be important. This in turn is also necessary in designing reform measures that are well suited to the context, as well as to understanding state capacities and incentive structures needed to implement such reforms.

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This publication was commissioned and funded by the Netherlands Government to support the Trade Facilitation West Africa programme with ECOWAS and UEMOA, as well as its wider partnerships in West Africa. It has also benefited from structural support by ECDPM's institutional partners: Austria, Belgium, Denmark, Estonia, Finland, Ireland, Luxembourg, the Netherlands and Sweden.

ISSN1571-7577

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