



Mali

Mali: Scenarios

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Relationship between scenarios

Chart 8: Current Path and scenarios

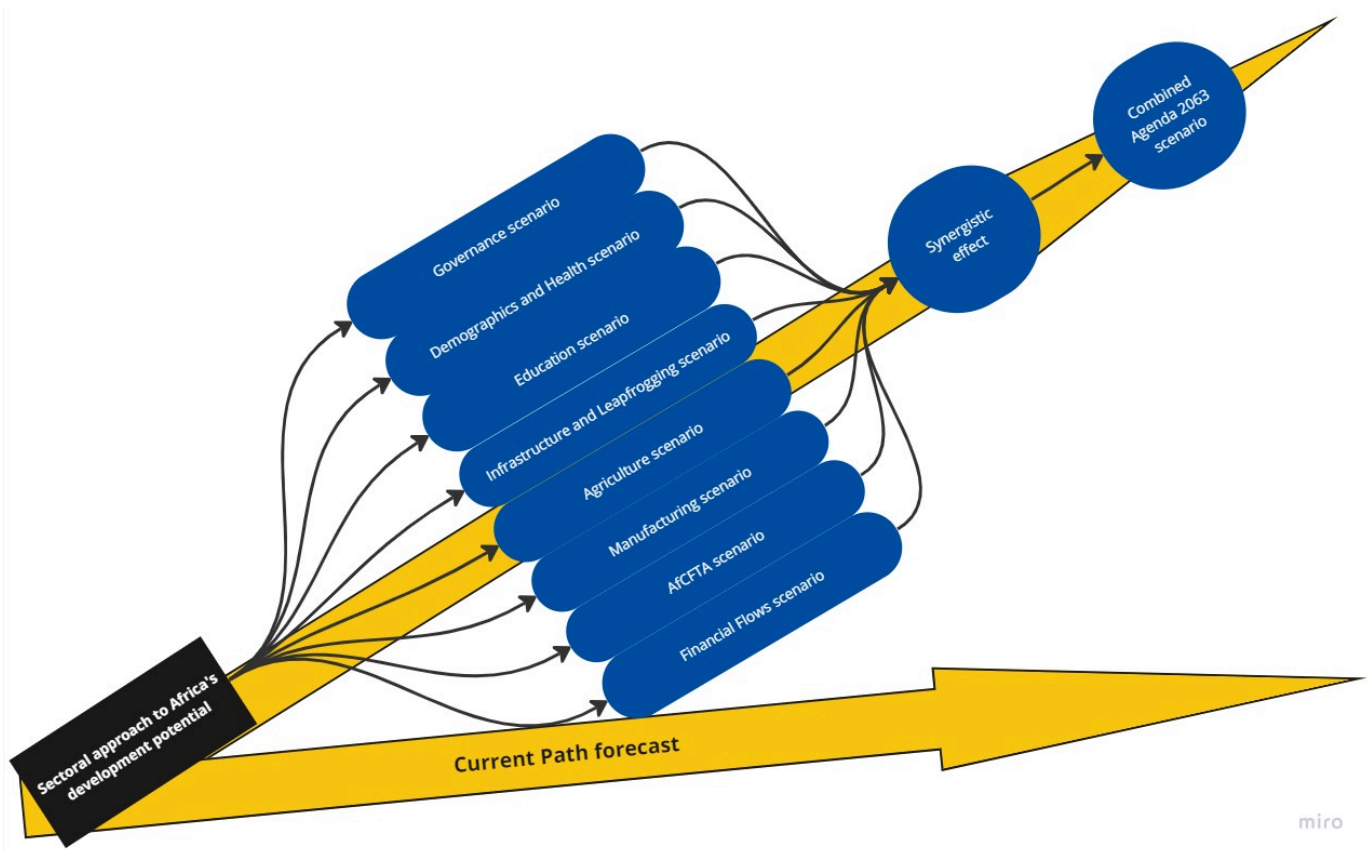


Chart 8 depicts the relationship between the Current Path forecast, the various sectoral scenarios and the Combined Agenda 2063 scenario.

The **Current Path** forecast is a dynamic scenario in the [International Futures forecasting platform](#) that imitates continuing current policies and environmental conditions.

The eight sectoral scenarios are each explained in the various themes on the website and the impact on each is compared with the Current Path forecast and a Combined Agenda 2063 scenario. The eight scenarios are:

- A more rapid **demographic** transition and investments in better **health** and water, sanitation and hygiene (WaSH) infrastructure.
- Better and more **education** (looking at quantity, quality and relevance).
- Large **infrastructure** and **leapfrogging** (the impact of renewables, ICT and the more rapid formalisation of the informal sector).
- Food security and an **agricultural**
- A low-end **manufacturing**
- The full implementation of the **African Continental Free Trade Area (AfCFTA)**.
- More inward **financial flows** (consisting of aid, foreign direct investment, remittances and illicit financial flows).
- Better **governance** (consisting of stability, capacity and inclusion).

The **Combined Agenda 2063** scenario is a combination of all eight sectoral scenarios.

The impact of these scenarios on **jobs/employment** and **greenhouse gas emissions and energy** are presented in separate themes.

A final theme models the effect of alternative **global scenarios** on Africa's development potential.

The interventions within IFs are detailed in an **annexure** at the end of this page.

Demographics and Health scenario

Chart 9: Demographics and Health scenario

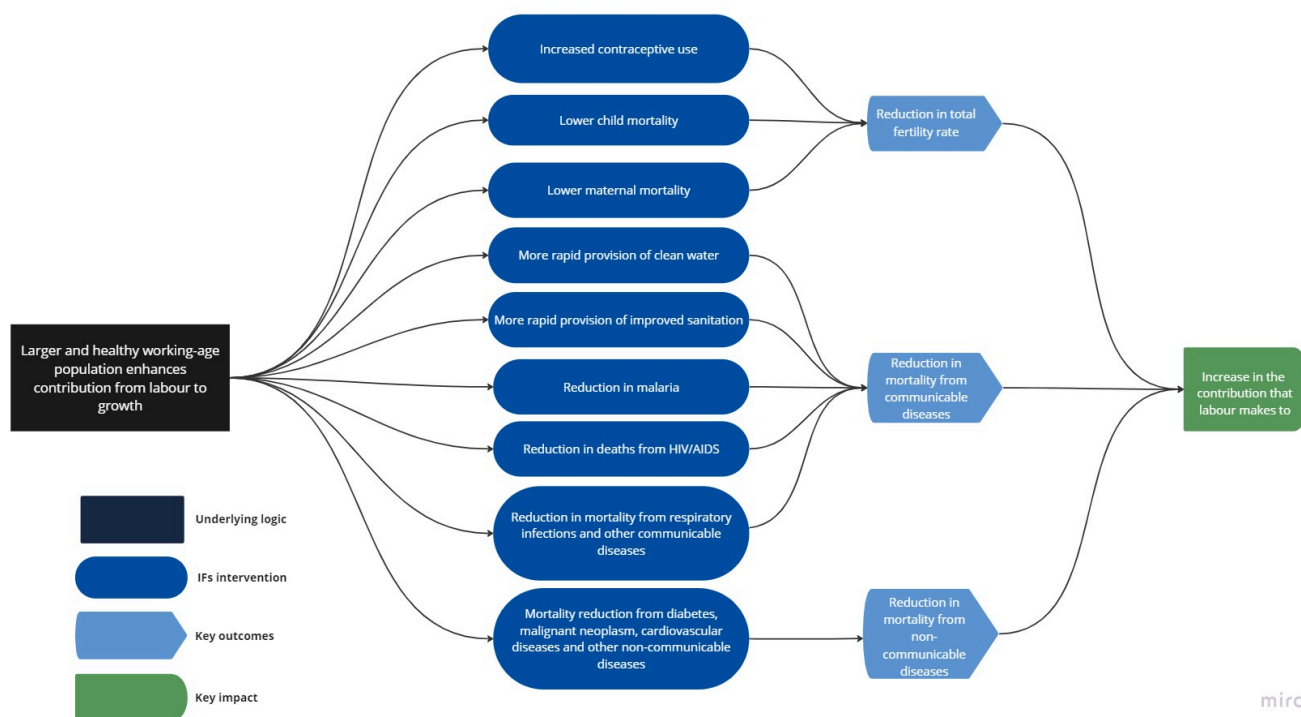


Chart 9 presents the structure of the Demographics and Health scenario as modelled in IFs that advances the demographic dividend and improves health.

The Demographic and Health scenario consists of reasonable but ambitious reductions in child and maternal mortality ratio, increased access to modern contraception and reductions in the mortality rates associated with both communicable diseases (e.g. AIDS, diarrhoea, malaria and respiratory infections) and non-communicable diseases (e.g. diabetes), as well as improvements in access to safe water and better sanitation.

Visit the themes on [Demographics](#) and [Health/WaSH](#) for more detail on the scenario structure and interventions.

Mali's health sector has made significant progress in recent years, although several challenges remain. For instance, expanding the healthcare infrastructure and placing medical personnel in rural regions have increased access to high-quality healthcare services in Mali.[1] The Malian National Statistics Office (INSTAT) and ICF (2019) report notes improvements in maternal and child health outcomes, including decreased maternal mortality rates and increased vaccine coverage.[2] A 2020 World Health Organization study showed a strong emphasis on the necessity of enhancing disease surveillance and response systems to effectively manage and prevent outbreaks. They also emphasised the significance of improving healthcare infrastructure and expanding access to hygienic conditions and clean water to stop the spread of contagious diseases.

The country faces various health challenges due to its inadequate healthcare infrastructure.[3] Malnutrition, exacerbated by the security crisis, is widespread, particularly among children, with around 21% of children under five years old classified as underweight.[4] Mali's infant, child and maternal mortality rates continue to be among the highest in sub-Saharan Africa. This is mainly due to the poor availability and uptake of family planning in the country, early

childbearing, high rates of female genital mutilation, infrequent use of skilled birth attendants and a paucity of emergency obstetrical and neonatal care.[5] Furthermore, the country also has one of the lowest densities of healthcare workers, especially in the rural areas, which has led to a limited capacity to deliver essential health services.[6]

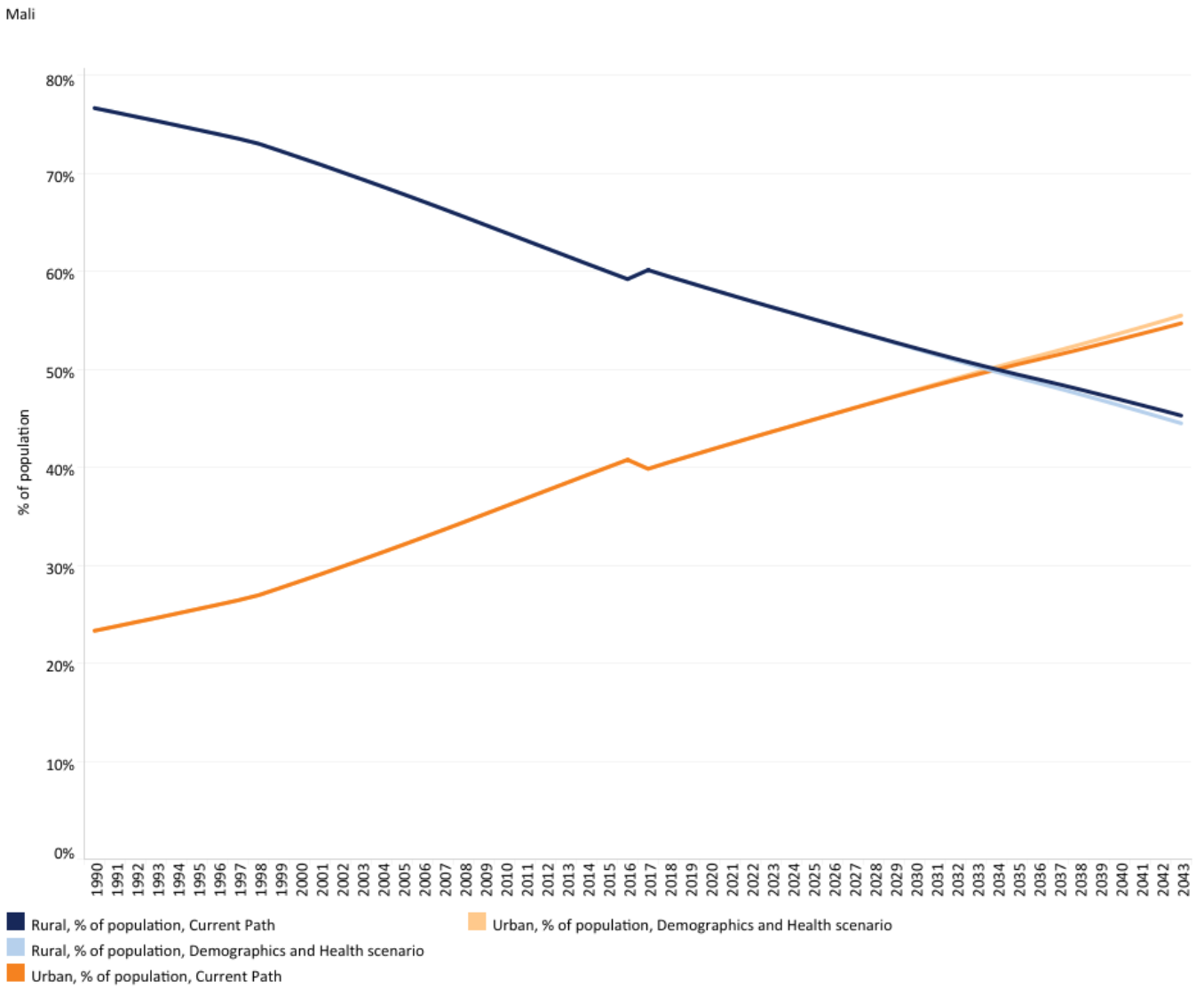
Historically, like many African countries, Mali has had high rates of mortality caused by communicable diseases. Persistently high rates of maternal and child mortality, the highest adolescent fertility rate in the world, low levels of basic child immunisation and malnutrition are still challenges confronting the country. Also, Mali continues to battle with a comparatively high burden of infectious diseases, particularly tuberculosis, malaria and diarrhoea, as well as a rising burden of non-communicable diseases.[7]

IFs uses the International Classification of Disease (ICD) to differentiate between three broad categories of diseases: communicable, non-communicable and injuries, as well as 15 subcategories of mortality and morbidity. In 1990, communicable diseases caused about 118 000 deaths—representing about 72% of total deaths in that year. This was followed by non-communicable diseases that caused 37 000 deaths (22.5% of total deaths) and injuries that caused 9 000 deaths (5.6% of total deaths). By 2019, deaths from communicable diseases had steadily declined to 108 000, although this was still 62% of all deaths. Malaria alone caused about 30 000 deaths in 2019. Deaths from non-communicable diseases and injuries rose to 53 000 (equivalent to 30.5% of all deaths) and 13 000 (equivalent to 7.5% of all death), respectively.

On the Current Path, Mali is projected to achieve its epidemiological transition in 2031. This is the point where deaths from non-communicable diseases outweigh deaths from communicable diseases. By 2043, non-communicable diseases will be the highest cause of death in Mali causing 105 000 deaths in the country (about 58.6% of all deaths). The transition to deaths from non-communicable diseases as the main cause of mortality will inevitably increase health sector costs as they are more expensive to treat. By then, deaths from communicable diseases will rapidly decline to 50 000, constituting 27.9% of all deaths, while deaths from injuries will constitute the remaining 13.6%.

Access to improved, safe, treated water, such as piped water, is an important means of preventing the spread of communicable diseases. In 2019, 17.5 million Malians (constituting 84.9% of the population) had access to improved water supply. Out of this, 9.9 million people (about 48.1% of the population) had access to piped water supply in the country. By 2043, it is projected that access to improved water will increase to about 91.5%, of which piped water will constitute almost 62% connections. Also, about nine million Malians (44% of the population) had access to improved sanitation in 2019, almost twice the average for its income-group peers in Africa. At 17.5%, the share of the population with access to shared sanitation is slightly above the average of Africa's low-income group of 14.7%. On the Current Path, the proportion of the population with improved access to sanitation is estimated to rise to 68.3% by 2043.

Chart 10: Urban and rural population in Current Path and Demographics and Health scenario, 1990-2043



Source: IFs 7.84 initialising from UN world urbanization prospects data

Chart 10 compares urban and rural populations in the Current Path and the Demographics and Health scenario.

Mali’s population is predominantly rural. In 1990, over two-thirds of Malians lived in rural areas—slightly below the average for low-income countries in Africa. However, Mali has urbanised more rapidly than its income peer group in Africa over the years. As a result, by 2019, 12.1 million Malians, equivalent to 58.8% of the population, lived in rural areas. This was below the 69% average of low-income countries in Africa. Consequently, the urban population stood at 41.2% in 2019, making Mali the ninth most urbanised country among low-income African countries instead of the 13th, as it was in 1990.

Rural-urban migration is one of the factors contributing to Mali's urbanisation. Many rural residents are relocating to urban regions in search of better employment prospects, better housing options and access to essential services like healthcare and education. As a result, Mali's urban population has been continuously growing over time.[8] Other factors influencing urbanisation in Mali include agricultural commercialisation and transformation. There is an increasing need for labour in metropolitan areas such as Koulikoro, particularly in agro-industries and processing plants, as the economy

transitions from subsistence farming to commercial agriculture, thereby necessitating large numbers of rural residents to move to urban areas.[9]

On the Current Path, Mali will achieve parity in urban–rural settlement by 2034; and by 2043, 22.5 million Malians, constituting almost 54.7% of the population, will live in urban areas. This will be far above the average of 41% projected for low-income countries in Africa. In the Demographics and Health scenario, the proportion of Malians projected to reside in urban areas will slightly increase to 55.5% by 2043.

Chart 11: Infant mortality rate in Current Path and Demographics and Health scenario, 2019-2043

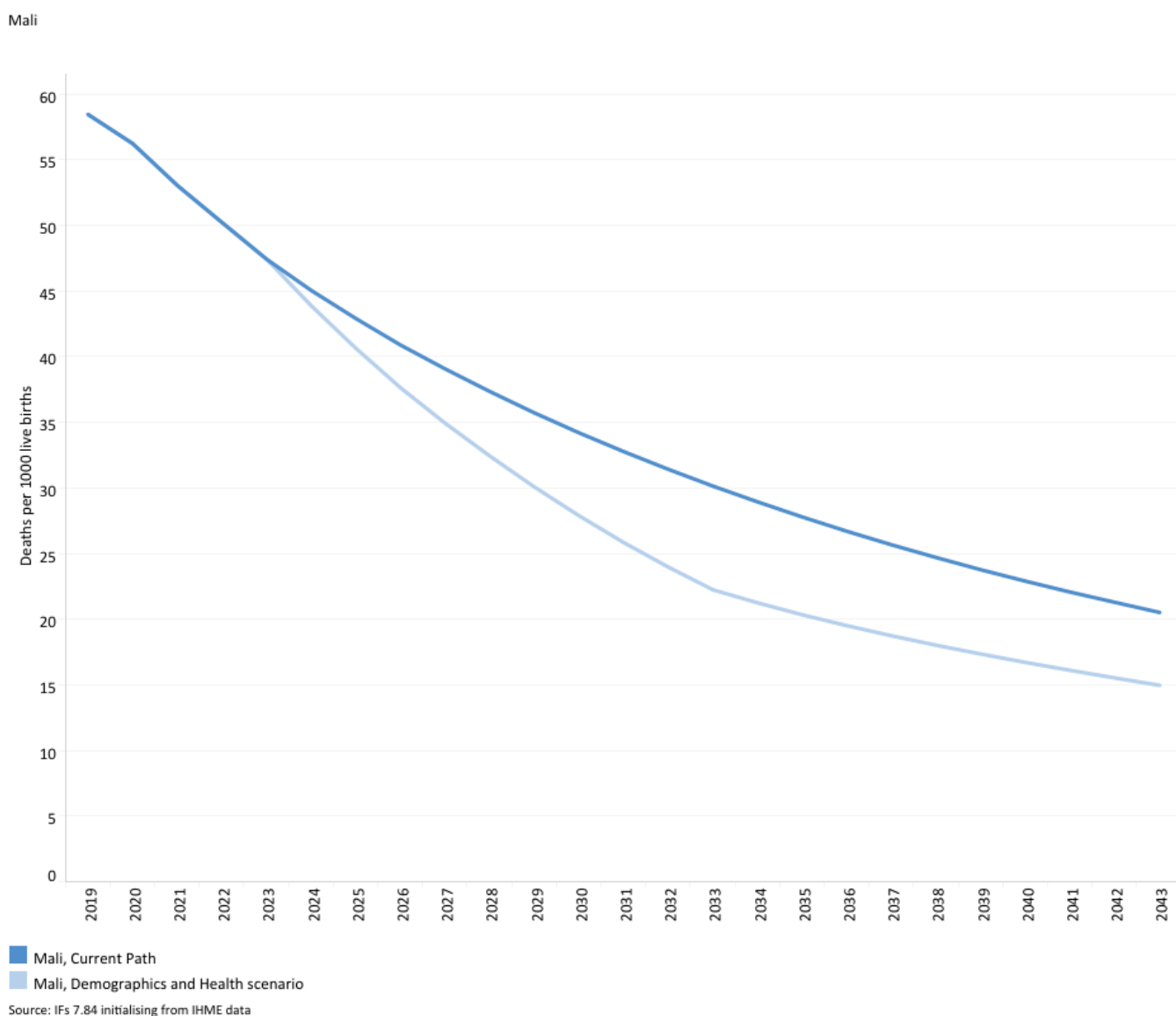


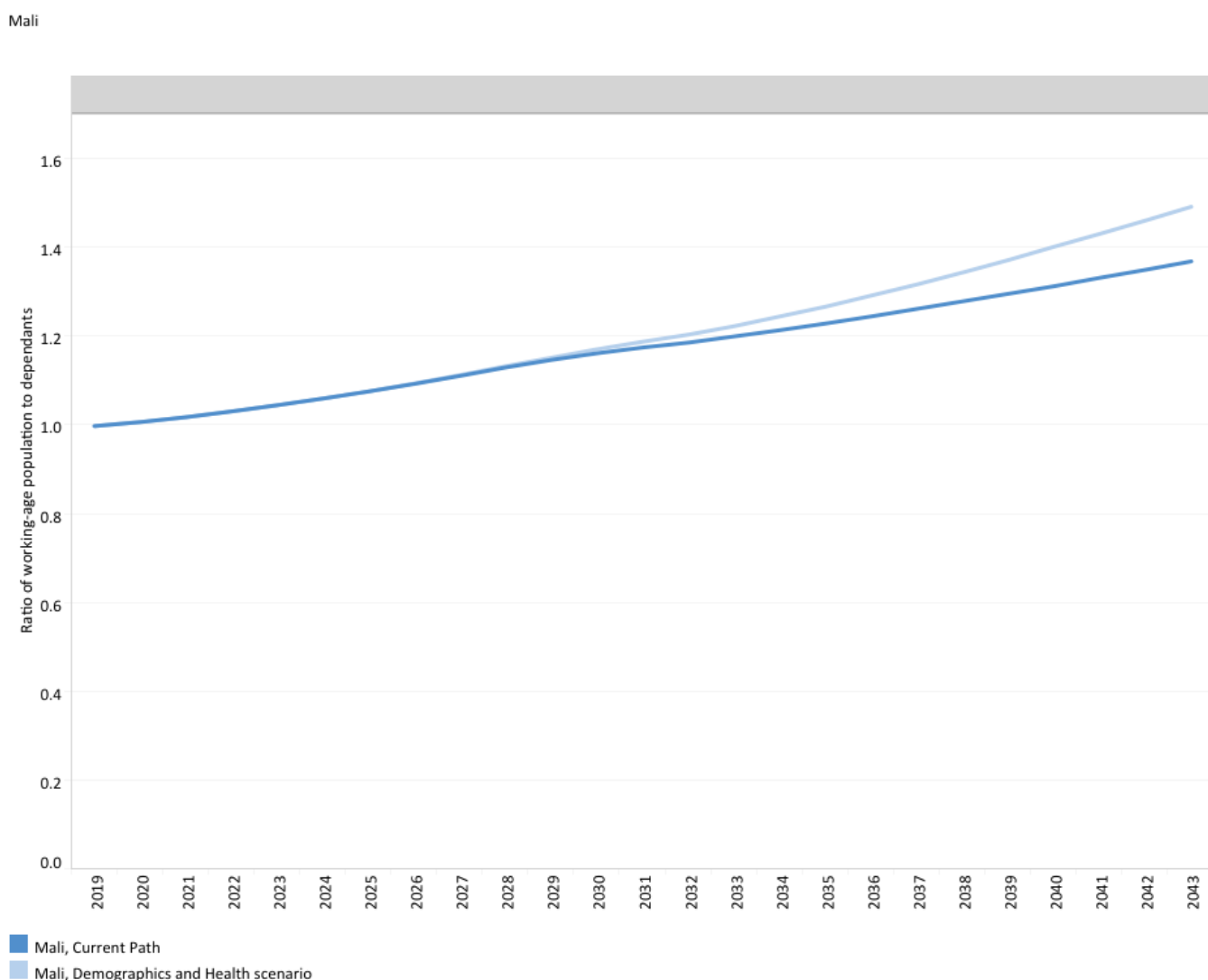
Chart 11 presents the infant mortality rate in the Current Path and the Demographics and Health scenario.

The infant mortality rate is an important marker of the overall quality of a country’s health system. In 2019, the infant mortality rate in Mali was 60.2 deaths per 1 000 live births—a drop by half of the rate in 1990. This was 27% higher than the average of 47.4 deaths for low-income countries in Africa. On the Current Path, the infant mortality rate is expected to

decline further, reaching 21.8 deaths per 1 000 live births by 2043, which is almost on par with the average for low-income countries in Africa.

The Demographics and Health scenario will reduce Mali’s infant mortality rate to 15 deaths per 1 000 births by 2043. This will push the infant mortality rate in Mali close to the SDG target of 12 deaths per 1 000 live births by 2030. This is almost six deaths fewer than in the Current Path forecast and seven fewer deaths than the Current Path average of low-income countries in Africa.

Chart 12: Demographic dividend in the Current Path forecast and the Demographics and Health scenario, 1990-2043



Source: IFs 7.84 initialising from UNPD Population Prospects data

Chart 12 presents the demographic dividend in the Current Path and in the Demographics and Health scenario.

Demographers typically differentiate between a first, second and even a third demographic dividend. Given Mali’s youthful population structure, and the strides made in the past two decades, the study focuses on the first dividend. There are different ways to conceptualise the first demographic dividend. For example, studies have shown that a promising

demographic window occurs when less than 30% of the population falls within the ages 0–14 years (children) while those above the age of 65 years and above (elderly) make up less than 15%.^[10] Alternatively, a demographic dividend opens when a country attains an average median age of between 26 and 41 years.^[11] The study uses the ratio of working-age persons to dependants, i.e. the size of the labour force (between 15 and 64 years of age) relative to dependants (children and elderly people).

The demographic dividend is the economic growth generated by change in the population structure. It generally materialises when the ratio of the working-age population to dependants is at least 1.7-to-1, meaning that for every dependant, there are 1.7 workers. When there are fewer dependants to take care of, it frees up resources for investment in both physical and human capital formation. Studies have shown that about one-third of economic growth during the East Asia economic ‘miracle’ can be attributed to the large worker bulge and a relatively small number of dependants.^[12] However, the growth in the working-age population relative to dependants does not automatically translate into rapid economic growth unless the labour force acquires the needed skills and is absorbed by the labour market. Without sufficient education and employment generation to successfully harness their productive power, the growing labour force (especially those in urban areas) could increasingly become frustrated with the lack of job opportunities leading to social tension and even the emergence of civil instability.

In 2019, the ratio of the working-age population to dependants in Mali was 1-to-1, which means that on average, for every dependant in Mali, there was only one person of working age (15–64 years of age). This is lower than the 1.2-to-1 average for low-income countries in Africa. The high dependency rate in Mali can be attributed to the high fertility rate. On the Current Path, Mali will likely not achieve the minimum ratio of 1.7 working age persons for each dependent required for the materialisation of the demographic dividend, or demographic gift, by 2043. Indeed, based on the Current Path, Mali is likely only to achieve this minimum ratio by 2058.

The Demographics and Health scenario pushes the country close to this target such that by 2043, the ratio of the working-age population to dependants is projected to be 1.5-to-1 in the scenario instead of the 1.4-to-1 as in the Current Path (on par with the average for its income-group peers in Africa by 2043).

Agriculture scenario

Chart 13: Agriculture scenario

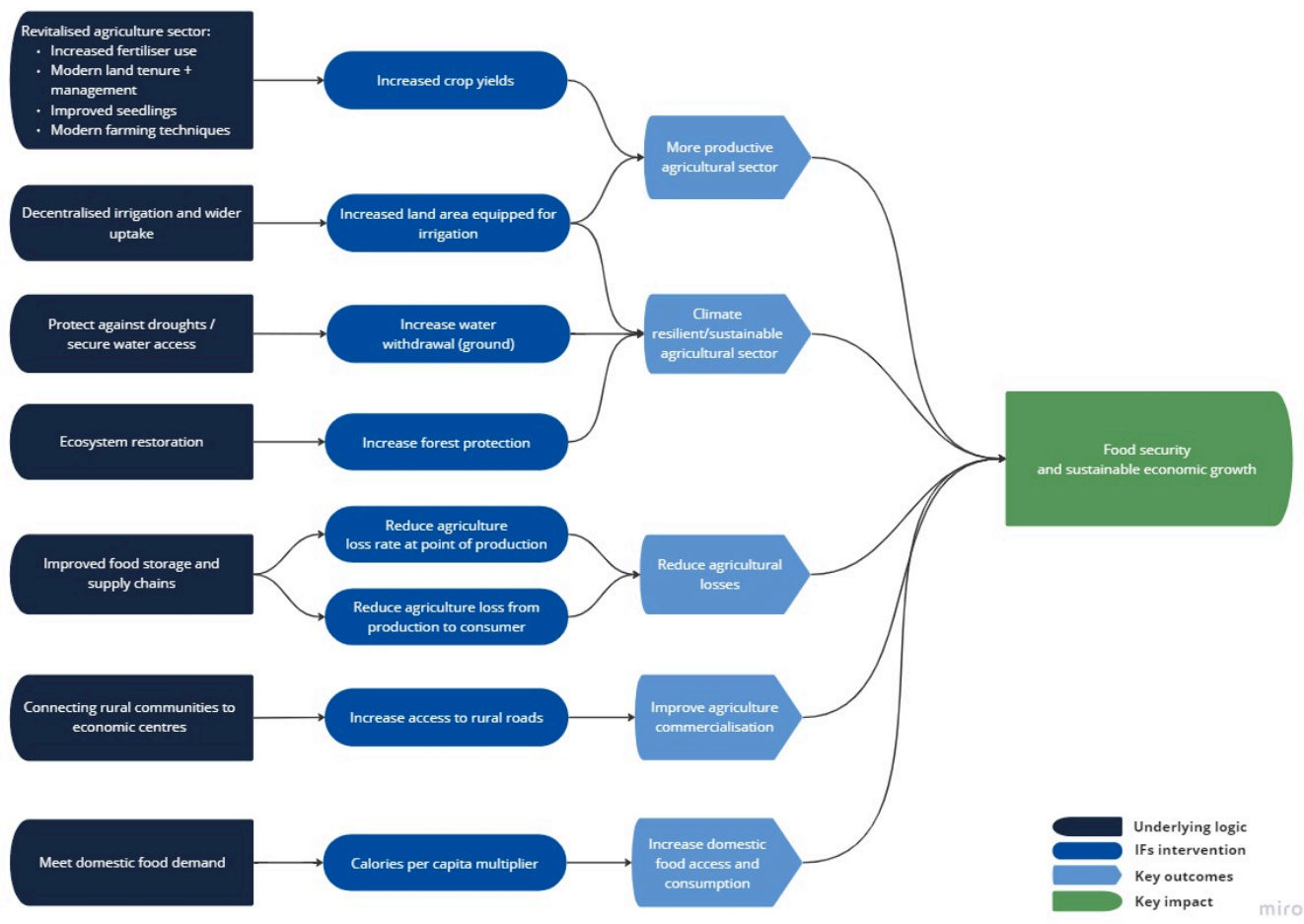


Chart 13 sets out the composition of the Agriculture scenario to advance food security.

The Agriculture scenario represents reasonable but ambitious increases in yields per hectare (reflecting better management and seed and fertiliser technology), increased land equipped and under irrigation and reductions in food loss and waste. We use increased calorie consumption as a proxy for food self-sufficiency above food exports as a desirable policy objective. The increase in forest protection reflects sustainable land use practices.

Visit the theme on [Agriculture](#) for our conceptualisation and details on the scenario structure and interventions.

Mali has ideal circumstances for agricultural development as it has a sizable area of arable land and an abundance of water supplies from the Niger and Senegal rivers. Agriculture and agro-pastoralism are the main economic pillars of Mali: nearly 80% of Malians work in the agriculture sector. According to the International Trade Administration (ITA), the Malian government dedicates about 12% of its national budget to the agricultural sector and subsidises cotton. Cotton is one of Mali's essential agricultural products, accounting for a significant portion of its exports.[13] Other agricultural commodities, such as rice, corn, millet, sorghum and wheat, make up the majority of Mali's agricultural output.

In 1990, Mali's average crop yield of 1.7 metric tons per hectare was 36% higher than the average of 1.2 tons for its

income-group peers in Africa. However, by 1996, the average yield per hectare in Mali had fallen below its income-group peers in Africa. The dip in yield within this period can be attributed to changing weather patterns, especially since agriculture production in the country is rainfed and, thus, susceptible to climate change. This trend continued until 2015, when Mali overtook its income-group peers in Africa. By 2019, the average crop yield per hectare of 3.1 metric tons in Mali was 11.1% higher than the average of low-income countries in Africa. This ranks Mali 13th in the low-income group, but equates to less than half the yield per hectare in Rwanda and Malawi. On the Current Path, yield per hectare will rise to 4 metric tons per hectare by 2043—on par with the average of low-income African countries.

Over the years, the government has made efforts to improve agricultural productivity by encouraging foreign and national private investors to undertake agricultural activities in the lands of the Office du Niger (an irrigation scheme).[14] In addition, the government has been investing in irrigation infrastructure, aiming to enhance water accessibility and to minimise the impact of climate change.[15] Government and NGO training programmes and extension services connect farmers to contemporary agricultural methods, enhanced seed varieties, effective water management strategies and financial access. Also, through funding, rural infrastructure and fostering integration with regional and global markets, efforts are being undertaken to increase market access.[16]

Nonetheless, the sector is confronted with numerous challenges. Although the country has important and underexploited agricultural potential, especially in the southern and central regions, climate change and vulnerability to droughts and desertification pose significant threats to agricultural productivity and food security.[17] The sector's potential for growth is also hampered by a lack of infrastructure, including storage facilities, irrigation systems and transportation, making it difficult for farmers to access markets and avoid post-harvest losses. Furthermore, traditional farming practices and a lack of access to modern technology and high-quality inputs like seeds and fertiliser continue to result in low output.[18]

Total agriculture production[19] in 1990 stood at about 4 million metric tons. Of this, 3.3 million metric tons, representing 82.5%, were crops, with the remainder constituting meat production. By 2019, total agricultural production had grown to 18.2 million metric tons. Of this, crop production constituted 91%, equivalent to 16.5 million metric tons, meat production 8.2%, and fish production constituted the remainder of the total production. Mali faces huge agriculture loss and waste estimated at 26.2% of total production. This is largely due to post-harvest losses for crops, estimated at 10.3% of production, and transmission losses for crops, at 12.7%. Such losses can be a result of pest and disease infections, spoilage and the lack of adequate and effective storage facilities.

In terms of demand, the total demand for agricultural products in Mali has always been more than the total production. Total demand stood at about 4.5 million metric tons in 1990, of which 3.7 million metric tons, equivalent to 83% of total demand, were for crops. The remaining demand was for meat (685 000 tons) and for fish (73 000 tons). Comparing this to the total production (about 4 million metric tons) in the same year reveals that Mali had excess demand for agricultural products in that year of about 493 000 metric tons. Since then, domestic demand has rapidly outgrown production, and by 2019, agricultural demand exceeded domestic production by 1.7 million metric tons, despite the increase in production. Of the total demand of 19.9 million tons, 92.1% is for crops (18.3 million tons). The remaining demand is mainly for meat (1.5 million tons), and the lowest demand is for fish (205 000 tons).

Despite the projected increase in domestic production, reaching 29.6 million metric tons in 2043, it will not be enough to meet domestic demand that will rapidly grow to 37.6 million metric tons. As a result, excess demand for agricultural products will reach 8.2 million by 2043. This indicates that Mali faces the risk of food shortages in the future if drastic measures are not taken to revamp the agriculture sector to increase domestic production. With total agricultural demand outgrowing domestic production, Mali is likely to rely on imports to meet its domestic demand. In 2019, Mali's net import of crops stood at 5.4% of total crop demand, which was less than the average of 6.6% for low-income countries in Africa. Also, net import of fish stood at 39% of total fish demand, while net import of meat was estimated at just 1% of total meat

demand. In the Current Path forecast, net crop imports will grow rapidly in Mali to 34.2% of total crop demand by 2043. This suggests a growing level of national food insecurity; however, it can also be as a result of changes in dietary preferences.

Despite the expected rising food insecurity, many agricultural subsectors, including biofuels, shea butter, mangoes, peanuts and cashews, are still entirely untapped and present a unique opportunity for investors. Modernising Mali's poultry and cattle production and transformation industries also serve as potential avenues for improvement and growth.[20]

Chart 14: Import dependence in the Current Path and Agriculture scenario, 2019-2043

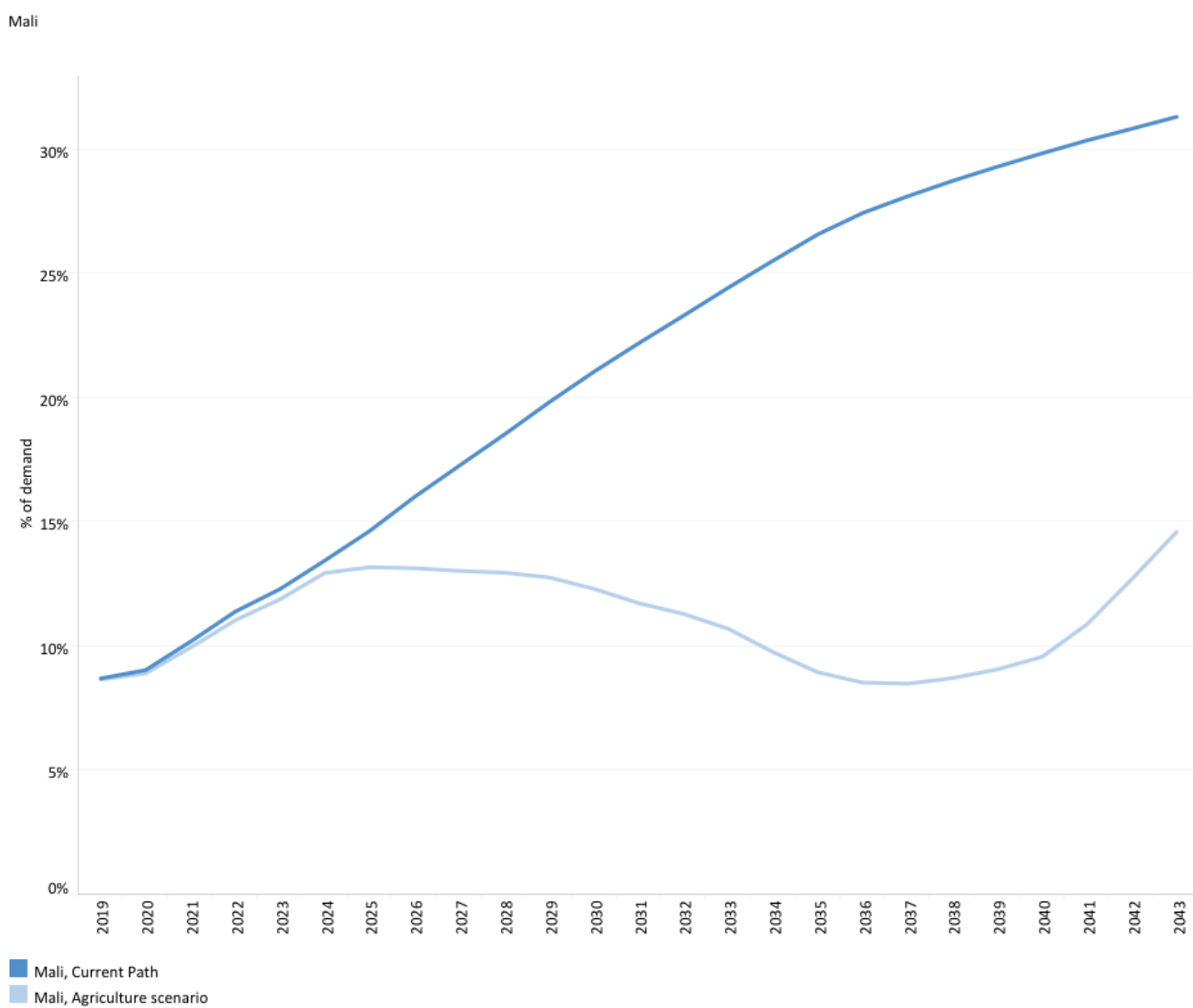


Chart 14 presents import dependence in the Current Path forecast and the Agriculture scenario.

In the Agriculture scenario, yield per hectare will increase to 5.4 metric tons by 2043—a 35% improvement compared to the projections of the Current Path and the average of low-income countries in Africa. The improvement in yields is

expected to lead to an improvement in total agricultural production.

By 2043, in the Agriculture scenario, total agricultural production will increase to 36.4 million tons, almost 6.8 million metric tons, or 22.8%, more than the Current Path forecast by 2043. Annual crop production in Mali will rise by 26.4% over the Current Path to 31.8 million tons in the Agriculture scenario by 2043. Furthermore, meat production in the scenario will increase by additional 116 000 tons over the Current Path to 4.7 million tons in 2043. The projected increases in crop production in the Agriculture scenario reduces the import dependency of crops in the country compared to the Current Path. By 2043, net import of crops is projected to reach 15% in the Agriculture scenario—half of the projected Current Path average of 34.2% but almost twice the projection for the average for its income-group peers in Africa.

Education scenario

Chart 15: Education scenario

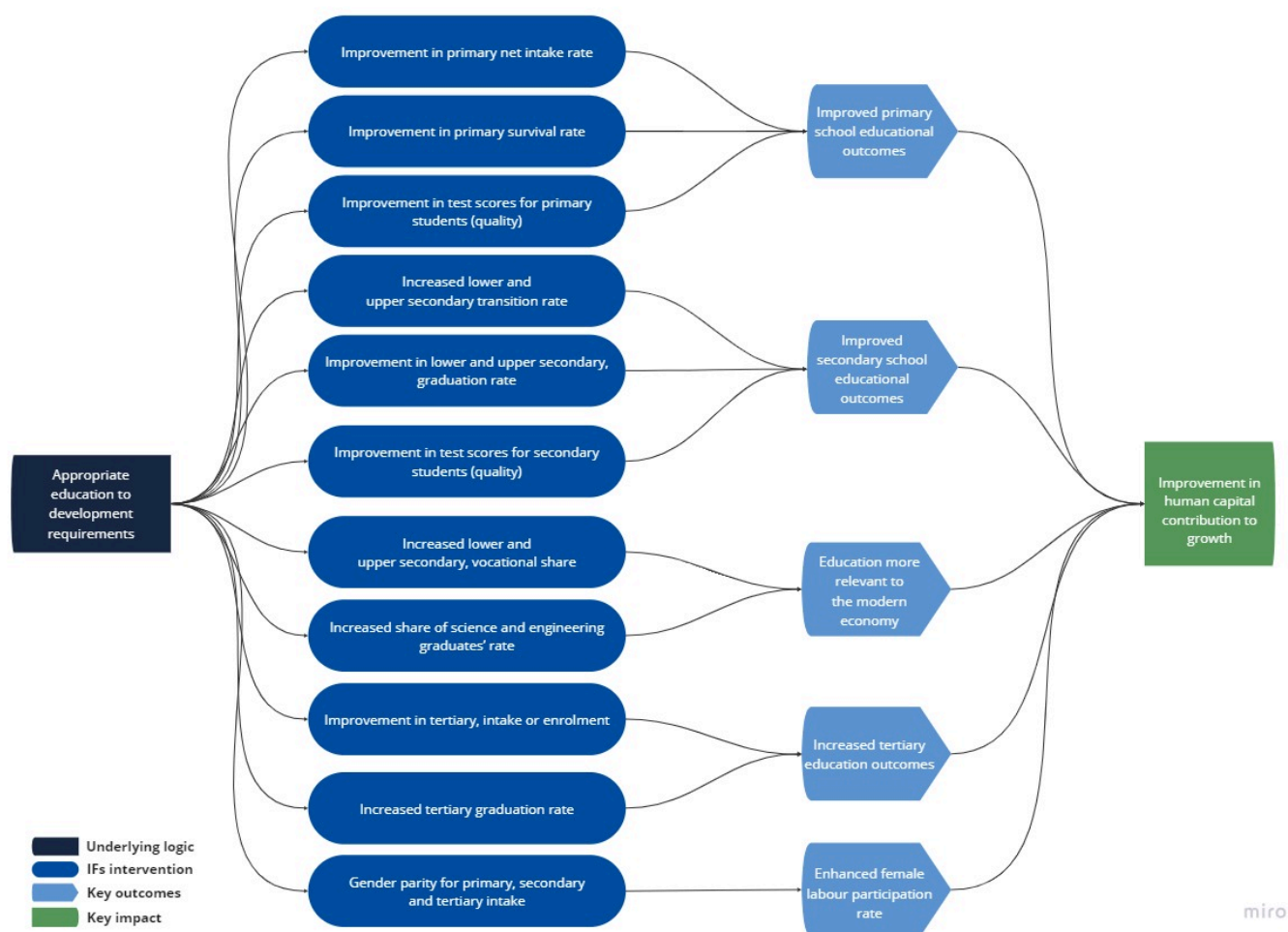


Chart 15 presents the structure of the Education scenario as modelled in IFs. The scenario improves the quantity and quality of education as well as its relevance to job requirements.

The Education scenario represents reasonable but ambitious improved intake, transition and graduation rates from primary to tertiary levels and better quality of education at primary and secondary levels. It also models substantive progress towards gender parity at all levels, additional vocational training at the secondary school level and increases in the share of science and engineering graduates.

Visit the theme on [Education](#) for our conceptualisation and details on the scenario structure and interventions.

Mali has a 6-3-3 education system, which consists of six years of elementary education, three years of lower secondary school and three years of upper secondary education.[21] The education system in Mali is confronted with enormous challenges regarding access and the quality of education. For instance, thousands of school-age children in pastoral communities in northern Mali lack access to education.[22] Also, threats from armed groups against schools and the destruction of school infrastructure and equipment has led to a shortage of teachers in affected areas and a breakdown in the pedagogical support system due to massive population displacements.[23]

As a result, families in affected areas are experiencing significant problems, which decreases the overall level of enrolment. The government directive aimed at schools in the south to indiscriminately accept relocated students has resulted in overcrowding and diminished educational quality.[24] In some schools, a single classroom can often accommodate up to 300 children due to the lack of infrastructure. In such circumstances, it is impossible for school-age children and students to be interested in learning.[25] In addition, Mali's lack of skilled teachers, inadequate textbooks and poor learning conditions all negatively impact learning outcomes for the children who attend school. As a result, most fifth graders struggle to acquire fundamental reading and mathematics skills, for example.[26] Emergency education in crisis zones is also highly underfunded and unsafe. Mali has had 1 in 10 of its schools remain closed since 2022 because of a shortage of facilities and instructional supplies attributed to insecurity and a funding crisis.[27]

The country, like most African countries, spends large amounts of its income on education, but the outcome is often poor due to corruption and mismanagement that cause inefficiencies in the education system. The Malian government's spending on education is boosted by support from non-governmental and international organisations. For example, the Global Partnership for Education provides the country with financial assistance and technical support to improve its education system.[28]

In 2019, Mali spent US\$818.6 million on its education system—this amount is equivalent to 4.1% of the country's GDP. At this rate, Mali's spending on education was on par with the average of low-income countries in Africa. On the Current Path, Mali's total expenditure on education is projected to reach US\$3.3 billion, constituting 5.5% of GDP, by 2043. Given the large annual influx of students, a whopping 46% of spending on education in Mali is on the primary level, 23.6% on the upper secondary level, 23% on the tertiary level and the remainder on the lower secondary. On average, it costs US\$1 586 to educate a student at tertiary level. This is almost 3.4 times what was spent on upper secondary students, 23 times the cost of educating a child at the lower secondary level and 13 times more than what it costs to educate a primary level student.

The education system can be viewed as a long funnel where children enter at the primary level and exit after completing tertiary-level education. However, the education funnel in Mali, like many sub-Saharan African countries, is leaky with various cracks along the way. Many children enter the system at the mouth of the funnel, but few complete the entire journey—from primary to secondary school and then university—to eventually graduate with a tertiary or equivalent education at the other end. In 2019, the gross enrolment rate for primary school students in Mali was 85.2%, a remarkable increase from 27.3% in 1990 but still far lower than the average of 105% of low-income countries in Africa. Comparing this to the net enrolment rate of 59% in the same period leads to two important conclusions. First, a significant number of children in Mali who are of school-going age are not in school. Secondly, many classrooms in Mali are likely to be crowded by older students. With a net enrolment of 59%, the country has the fifth lowest net enrolment rate among the 23 low-income countries in Africa. On the Current Path, Mali's gross and net enrolment rates are projected to reach 104.4% and 75.3%, respectively, by 2043. At this rate of progress, the country will still lag behind the average of its income-group peers in Africa.

The gross primary completion rate stood at almost 67% in 2019, indicating that a sizable number of children who enrolled did not complete the last grade of primary school in Mali. Although this rate is low, it is above the average of the country's African income-group peers at 53%. On the Current Path, Mali's progress in ensuring more children complete primary school will be slower compared to its income-group peers in Africa, as the former will catch up. By 2043, the primary completion rate in Mali is expected to rise to 86.6%—this is almost on par with the average of African low-income countries at 84.3%. Of those who complete primary level education, it is expected that some will transition immediately to the lower secondary level, some will enrol in the lower secondary level after some years out of school and some will never enter the lower secondary level, and so on through the upper secondary and tertiary levels.

In Mali, more students transition from primary level to lower secondary level than they do from lower secondary level to upper secondary level. In both cases, the rates are higher than Mali's income-group peers in Africa: gross enrolment for

lower and upper secondary levels in the country stood at 56.4% and 30.7%, respectively, in 2019, compared to 50.2% and 27.1%. By 2043, gross enrolment for the lower secondary level is projected to rise to 80%, while that of the upper secondary level will rise to 48.3%. Completion rates drop acutely from 31.2% in the lower secondary level to a mere 18.9% in the upper secondary level, indicative of a rapid contraction in the educational funnel in Mali. Even by 2043, only 48.2% of students are expected to complete their lower secondary education compared to 36.2% in upper secondary level.

At tertiary level, the situation is even worse. In 2019, only 6.4% of people within the age group were enrolled in tertiary institutions in Mali, and this will only improve to about 18.3% by 2043 on the Current Path. Worryingly, only 1.2% of the relevant age group in Mali graduated from a tertiary institution with at least a first degree in 2019. This will steadily rise to 4% by 2043, although it will still be lower than the rates in other low-income African countries. Enrolments in vocational training and science and engineering education, which are considered crucial to the future of work, are quite encouraging. In 2019, about 41% of upper secondary school students were enrolled in vocational training programmes in Mali. This is more than three times the average for low-income countries in Africa and the second highest in the group, only below the rates in Ethiopia. At tertiary level, in 2019, 17% of tertiary graduates in Mali enrolled in science and engineering programmes. Although this rate is the fourth highest among low-income countries in Africa, it is far below the rates in Eritrea and Sudan, estimated at close to 30%.

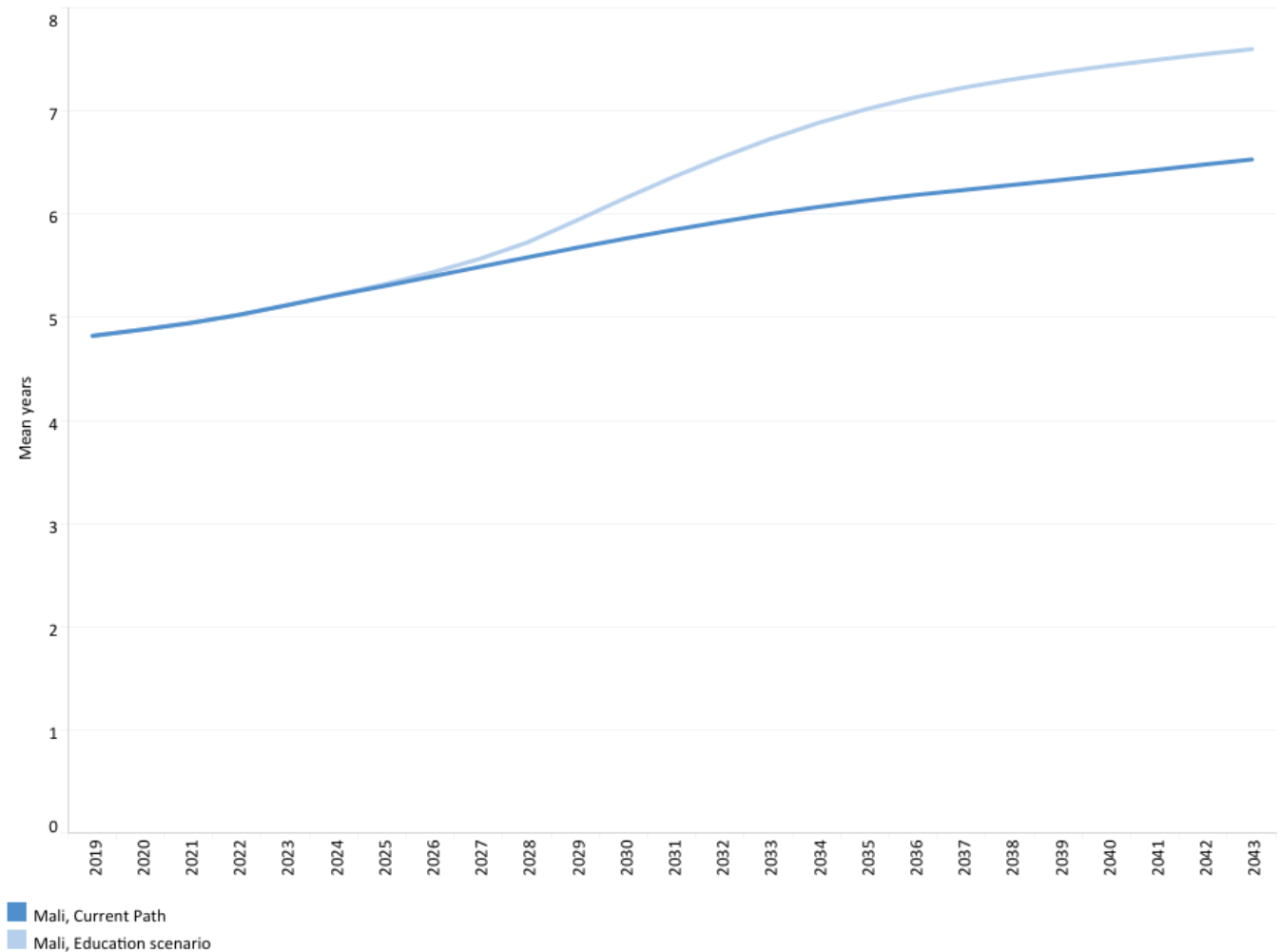
The gender gap is still very large. Although there are efforts by women at the local level to increase female enrolment, schools are not challenging stereotypes about girls.[29] In 2019, 90 females were enrolled in primary school for every 100 males in Mali compared to the 98 females to 100 males average of low-income countries. At secondary level, there were only 89 females enrolled in lower secondary schools for every 100 males in Mali, as opposed to the average of 87 females for every 100 males in low-income Africa. The ratio worsens notably at higher levels of education. At the upper secondary level, there were only 72 females for every 100 males in Mali compared to the 80 females to 100 males average of low-income African countries in 2019. At tertiary level, there were 51 female students for every 100 male students, compared to the average of 67 female students for every 100 male students for Mali's income-group peers on the continent.

Beyond the limited access to education in the country, there are also problems with the quality of education. In 2019, the average test score for primary and secondary students in Mali stood at 29.2 and 32.6 out of 100, respectively. The primary test score for Mali was slightly below the average of 27.2 for its income-group peers in Africa, the secondary score was below the average of 35.8 for its income-group peers on the continent. Thus, although Mali has tried to improve its education system, significant challenges still need to be addressed. These challenges include limited access to education, particularly for girls and those in rural areas, and low-quality and inadequate resources. The ongoing security situation further exacerbates these challenges, which, if not addressed, can reduce the human capital stock in the country and affect the productivity of labour in the country.

Chart 16: Mean years of education in Current Path and Education scenario, 2019-2043
15 to 24 year age group



Mali



Source: IFs 7.84 initialising from Barro-Lee data

Chart 16 presents mean years of education in the Current Path forecast and the Education scenario for the 15 to 24 age group.

The average years of education in the adult population (aged 15 years and older) is a good first indicator of the stock of knowledge in society. However, since that measure changes very slowly, Chart 16 presents the mean for the 15 to 24 age cohort.

In 2019, the mean years of education attained by adults between 15 and 24 years in Mali stood at 4.8 years—far below the average of 5.7 years for low-income countries on the continent. On average, females received 0.8 years more schooling than males. In the Current Path forecast, the average Malian between the ages of 15 and 24 years is expected to have received 6.5 years of education by 2043. This will be 1.1 years fewer schooling compared to the average for the country's

income-group peers in Africa. In the Education scenario, the mean years of adult education in Mali will rise to 7.6 by 2043, on par with the average of low-income countries in Africa and 1.1 years more than in the Current Path forecast. The interventions in the Education scenario also reduce the gender gap in educational attainment in Mali significantly.

The Education scenario further increases average test scores for primary students in the Education scenario to 39.2 in 2043, which is 17% more than in the Current Path forecast and 32% above the projected average of low-income countries in Africa in the same year. By 2043, the average test scores for secondary students in Mali will rise to 44.5%—this is 18% higher than the Current Path forecast and the average of low-income countries in Africa. It means that the Education scenario has the potential to improve the quality of education (reflected in the test scores) in Mali above that of its income-group peers in Africa.

Manufacturing scenario

Chart 17: Manufacturing scenario

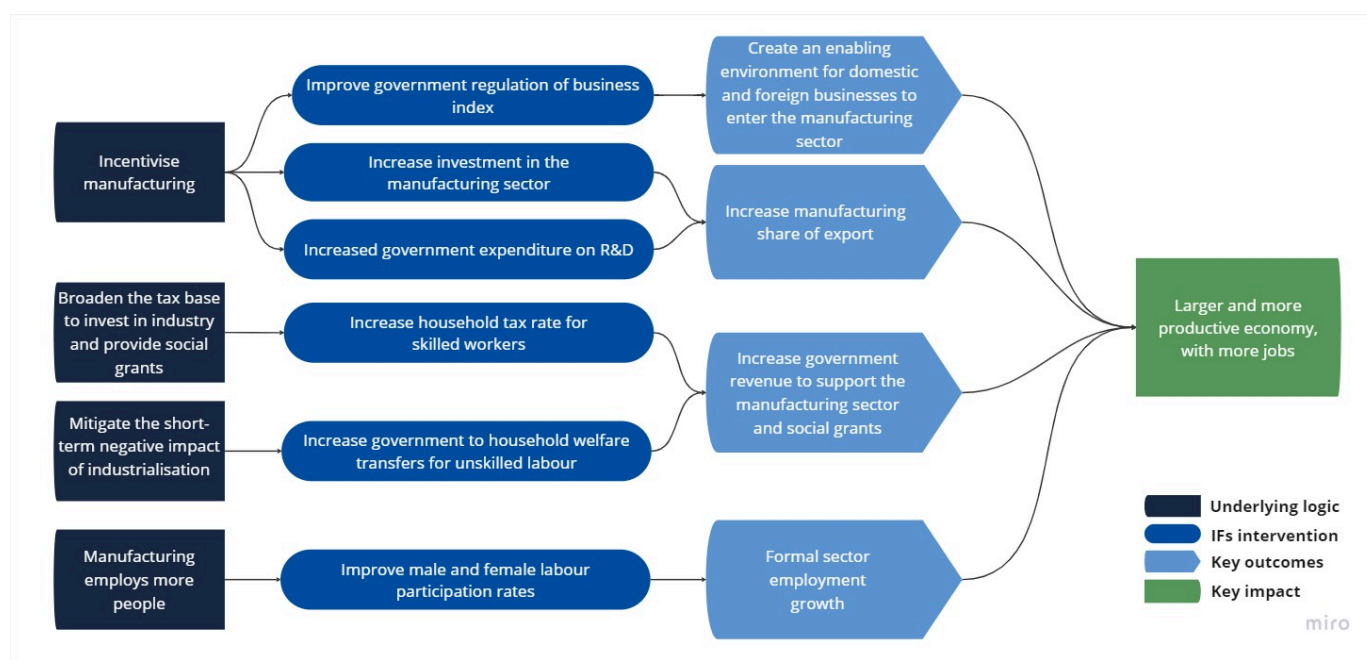


Chart 17 presents the structure of the Manufacturing scenario as modelled in IFs.

The Manufacturing scenario represents reasonable but ambitious manufacturing growth through greater investment in the manufacturing sector, in research and development (R&D) as well as improvement in government regulation of businesses. It increases total labour participation rates with a larger increase in female participation rates where appropriate. It is accompanied by increased welfare transfers (social grants) to unskilled workers to moderate the initial increases in inequality typically associated with a manufacturing transition.

Visit the theme on [Manufacturing](#) for our conceptualisation and details on the scenario structure and interventions. Chart 20 presents a summary chart that sets out the composition of the scenario.

The manufacturing sector is crucial for the productive transformation of a country's economy towards sustained high growth, employment creation and improved prosperity. It has backwards and forwards linkages with other sectors, such as the agriculture and the service sectors.

The manufacturing sector in Mali accounts for a relatively small share of its GDP. However, it plays a significant role in employment generation. According to the International Labour Organization's estimates, the industrial sector in Mali accounted for about 10% of total employment in 2021.[30] The manufacturing subsector in Mali includes textiles, agricultural tools, cosmetics, batteries, paint, plastics, processed foods, cement, cigarettes and beverages.[31]

The sector faces several difficulties that limit its development and productivity, including inadequate transportation networks, unstable power supplies and limited access to financing. The sector also lacks access to modern technology and innovative practices, which hurt its ability to compete in the global market. Finally, because of a lack of financial resources, outdated equipment and unskilled labour, productivity levels in the manufacturing sector have remained relatively low.[32]

Initiatives are underway to encourage the expansion and development of Mali's manufacturing industry. The Malian government has put in place several programmes and policies to entice investment in the industrial sector. These include tax breaks, financial aid and the construction of industrial parks to support manufacturing operations. Furthermore, commercial and industrial cooperation within the area has been made possible because of Mali's membership in regional economic organisations like the ECOWAS. Additionally, through training initiatives, access to financing and technology transfer projects, the government and foreign organisations are supporting small and medium-sized enterprises in the manufacturing sector.[33]

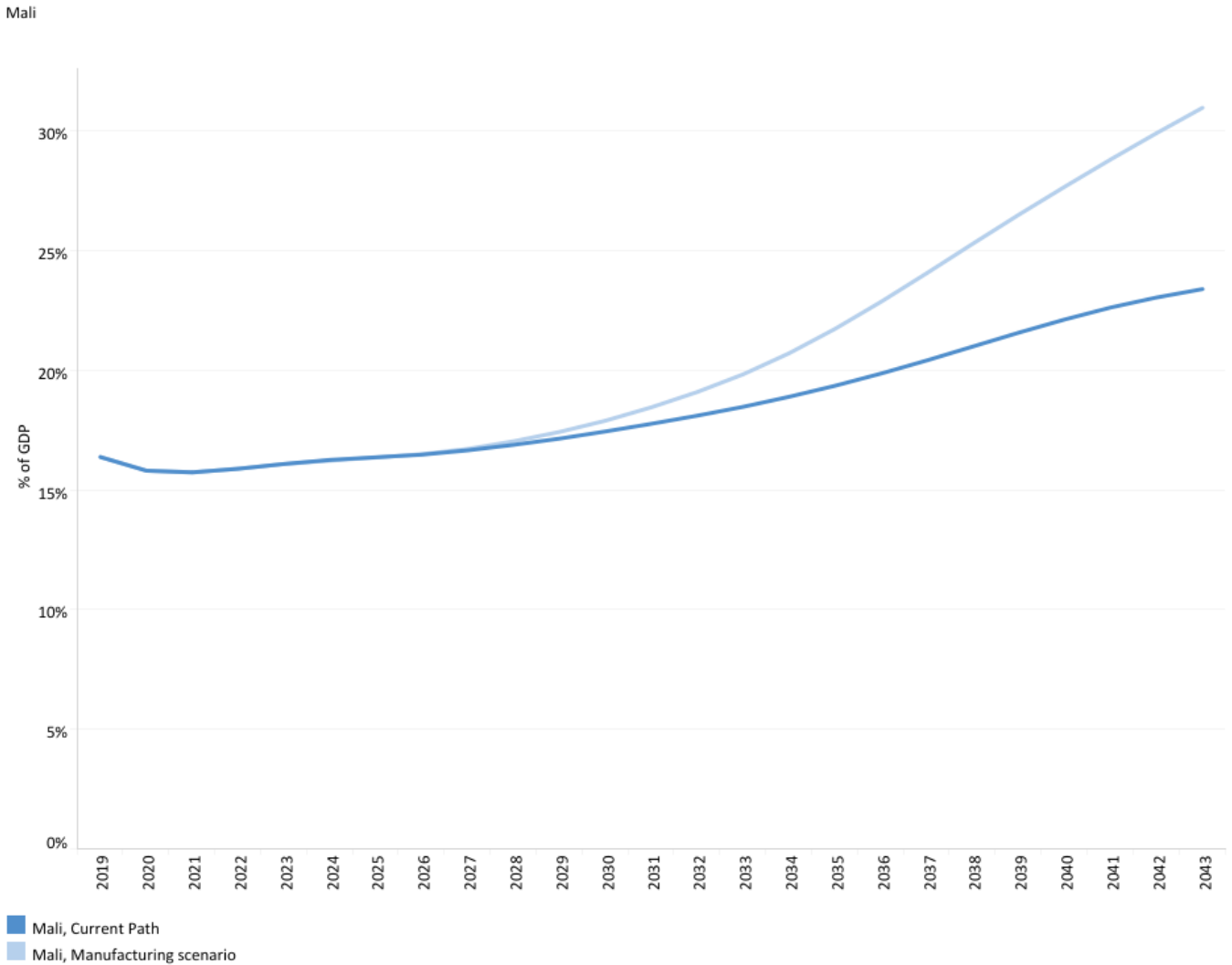
The three largest contributors to GDP in Mali are the service, agriculture and manufacturing sectors. In 2019, the service sector in Mali contributed US\$8.7 billion to the economy, equivalent to 43.6% of GDP. This is followed by the contribution of the agriculture sector valued at US\$6.4 billion, equivalent to about 32% of GDP. The manufacturing sector, contributed US\$13.3 billion, representing 16.4% of GDP in 2019. In the same period, the information and communications (ICT) sector contributed US\$768.5 million, constituting 3.8% of GDP, while the contributions of the energy and materials sectors were valued at US\$607.1 million (3% of GDP) and US\$238.7 million (1.2% of GDP), respectively.

On the Current Path, the service sector will extend its dominance in the economy with its contribution to GDP expected to more than quadruple in size to US\$35.6 billion by 2043 (54.2% of GDP). By 2043, the manufacturing sector will overtake the agriculture sector as the second largest contributor and will be valued at US\$15.3 billion (23.4% of GDP). At this rate, the contribution of manufacturing to GDP will be about 10.3 percentage points larger than agriculture at US\$8.6 billion, reflecting the structural transformation of Mali's economy, and, through more rapid growth, would lead to job creation. By 2043, the ICT sector in Mali will still be the fourth largest contributor to GDP with a share of 4.9% of GDP, valued at US\$3.2 billion. The energy and material sectors' contributions will be valued at US\$1.5 billion and US\$1.3 billion, corresponding to 2.2% and 2.1% of GDP, respectively.

Typically when countries embark on a manufacturing transition, inequality and poverty may initially increase. This is because resources and investments are diverted to more capital and knowledge-intensive sectors, which leads to an initial crunch in consumption. However, in the long term, these efforts stimulate inclusive growth with a greater impact on poverty and inequality reduction. Policies aimed at industrialisation, therefore, need to be accompanied by measures to mitigate these initial adverse effects. These could include efforts to directly support extremely poor families through social programmes or welfare spending to cushion vulnerable people.

Welfare transfers in Mali are very low compared to its income-group peers on the continent. In 2019, the total welfare transfers to households in Mali amounted to 0.6% of GDP, which was just about a quarter of the average rates in low-income African countries. On the Current Path, government welfare transfers to households will increase to about 1.6% of GDP. Despite this increase, it will still be far below the projected average of 6% of GDP for Mali's income-group peers in Africa.

Chart 18: Value-add by the manufacturing sector in Current Path and Manufacturing scenario, 2019-2043



Source: IFs 7.84 initialising from IMF World Economic Outlook data

Chart 18 presents the contribution of the manufacturing sector to GDP in the Current Path forecast and in the Manufacturing scenario. The IFs platform uses data from the Global Trade and Analysis Project (GTAP) to classify economic activity into six sectors: agriculture, energy, materials (including mining), manufacturing, services and information and communication technologies (ICT). Most other sources use a threefold distinction between only agriculture, industry and services, with the result that data may differ.

In the Manufacturing scenario, Mali makes substantial progress in industrialisation such that, by 2043, the share of the manufacturing sector in GDP is about 31% (US\$22.4 billion)—about eight percentage points of GDP above the Current Path forecast.

However, industrialisation is a difficult and long-term process. It requires constructive relationships between the state, which provides encouragement and support, and the private sector. Firms need a state with strong capabilities in setting an overall economic vision and strategy, efficiently providing supportive infrastructure and services, and maintaining a

regulatory environment conducive to entrepreneurial activity. Additionally, firms need a state that makes it easier to acquire new technology and enter new economic activities and markets.

AfCFTA scenario

Chart 19: AfCFTA scenario

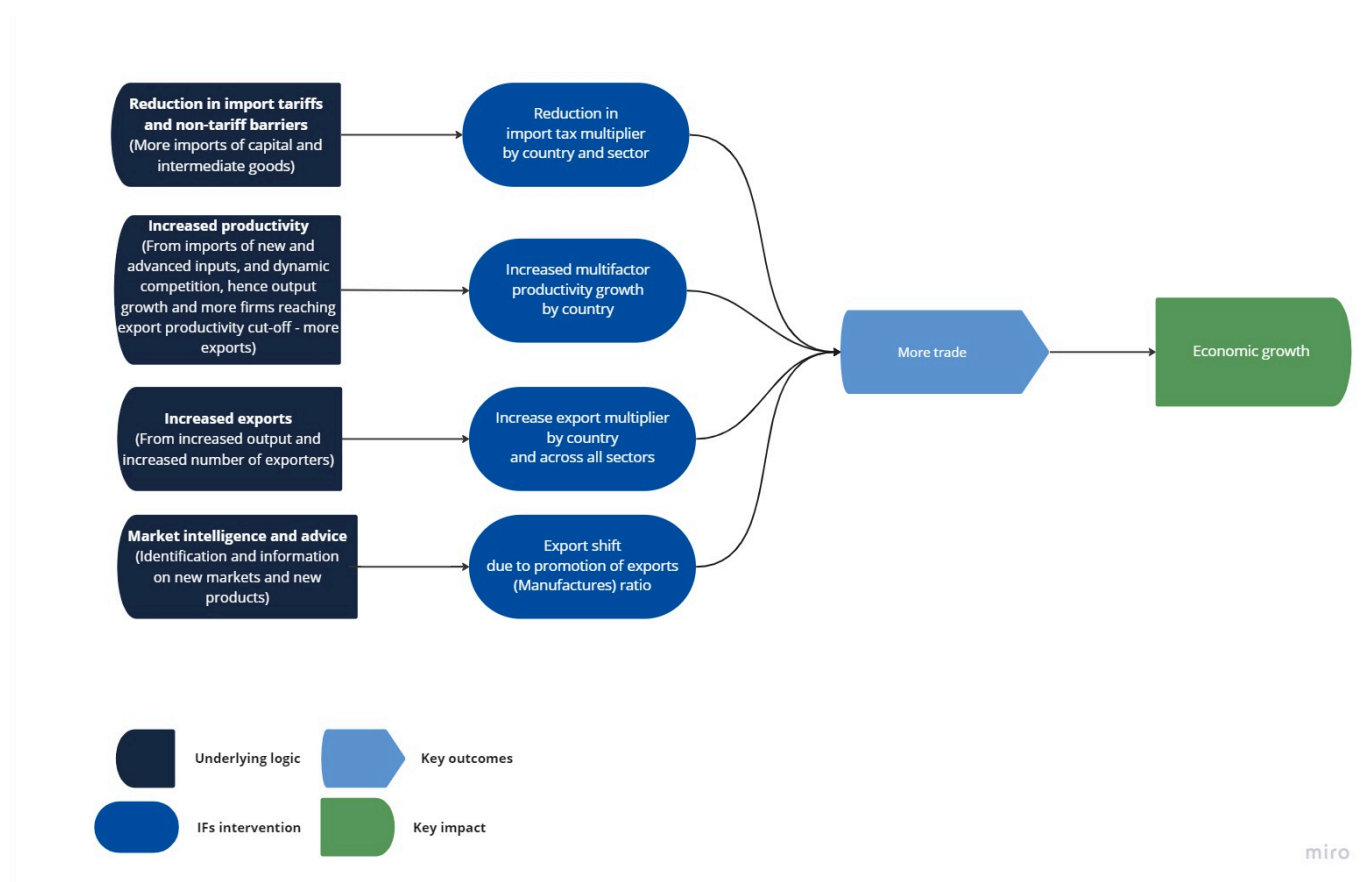


Chart 19 presents the structure of the AfCFTA scenario as modelled in IFs.

The AfCFTA scenario represents the impact of fully implementing the African Continental Free Trade Agreement by 2034. The scenario increases exports in manufacturing, agriculture, services, ICT, materials and energy. It also includes an improvement in productivity as a result of competition and technology diffusion emanating from trade liberalisation.

Visit the theme on [AfCFTA](#) for our conceptualisation and details on the scenario structure and interventions.

Historically, Mali's economy is more open^[34] to trade compared to its income-group peers in Africa. In 1990, the sum of Mali's exports and imports stood at 46% of GDP, which was above the average of 37.7% for low-income countries in Africa. By 2019, trade openness in Mali had jumped to 63.7% of GDP—far above the 47.1% average for low-income countries.

Over the years, efforts have been made to improve the country's trade. Mali is a member of the WAEMU, whose purpose is to reduce trade barriers by creating a common market. It has a customs union with a common external tariff. As a result, it benefits from the Trade and Investment Framework Agreement (TIFA), which offers the framework and principles for trade and investment negotiations between the WAEMU and the US. Mali is a member of the World Trade Organization and also signed the African Continental Free Trade Area Agreement (AfCFTA) in March 2018 to promote intra-African trade.^[35] Mali has also eliminated export duties and taxes on many products and established free zones to boost exports. In addition, the country has relatively low customs duties averaging around 10%, with few legal and regulatory trade barriers.^[36]

However, there are still factors that constrain trade. Inadequate infrastructure, such as roads, remains a constraint to economic integration in the country as well as the high costs of energy and telecommunications, which act as a disincentive to trade in the country.[37] Despite enjoying the preferential treatment granted to developing countries, the country exports only a small number of products, which are usually raw materials that are generally subject to zero or very low most-favoured-nation import duties in the importing countries. Also, Mali's manufacturing sector remains undeveloped. Although the country has substantial potential in the textile and agri-food industries, the damaging escalation of import duties does not favour the development of this sector.[38] In recent years, economic sanctions, such as the trade and financial embargo and border closure imposed on the country in early 2022 by ECOWAS and UEMOA, have negatively affected trade in Mali.

In 1990, the total export volume in Mali stood at US\$819.7 million, constituting 15.7% of GDP, slightly below the average of 16.9% for its income-group peers. Since then, exports from Mali have grown rapidly. By 2019, Mali's exports stood at US\$5.1 billion, equivalent to 29.2% of GDP, overtaking the average of 18.4% for low-income African countries. Gold is a major export of Mali accounting for almost 73% of total exports in 2019. This is followed by cotton, which accounted for 12% of total export in the same year, making it the largest exporter of cotton in Africa. Other significant exports include oily seeds, rough wood and refined petroleum.[39] Mali also trades in transportation, financial, insurance and cultural and recreational services.[40] Although the country aims to become self-sufficient in cereal production and a leading cereal exporter in the West African region, it is yet to achieve this vision, despite significant progress.[41] About 37% of total exports are destined for South Africa, 35.6% to Switzerland, 7.1% to Bangladesh, 4.2% to Ivory Coast and 2.8% to Burkina Faso.[42] Other notable export destinations include the United Arab Emirates, Switzerland, Australia, China and Turkey.[43]] On the Current Path, total exports in Mali are projected to reach 34.8% of GDP, equivalent to US\$22.8 billion, in 2043, exceeding the 27% average of its income-group peers in Africa.

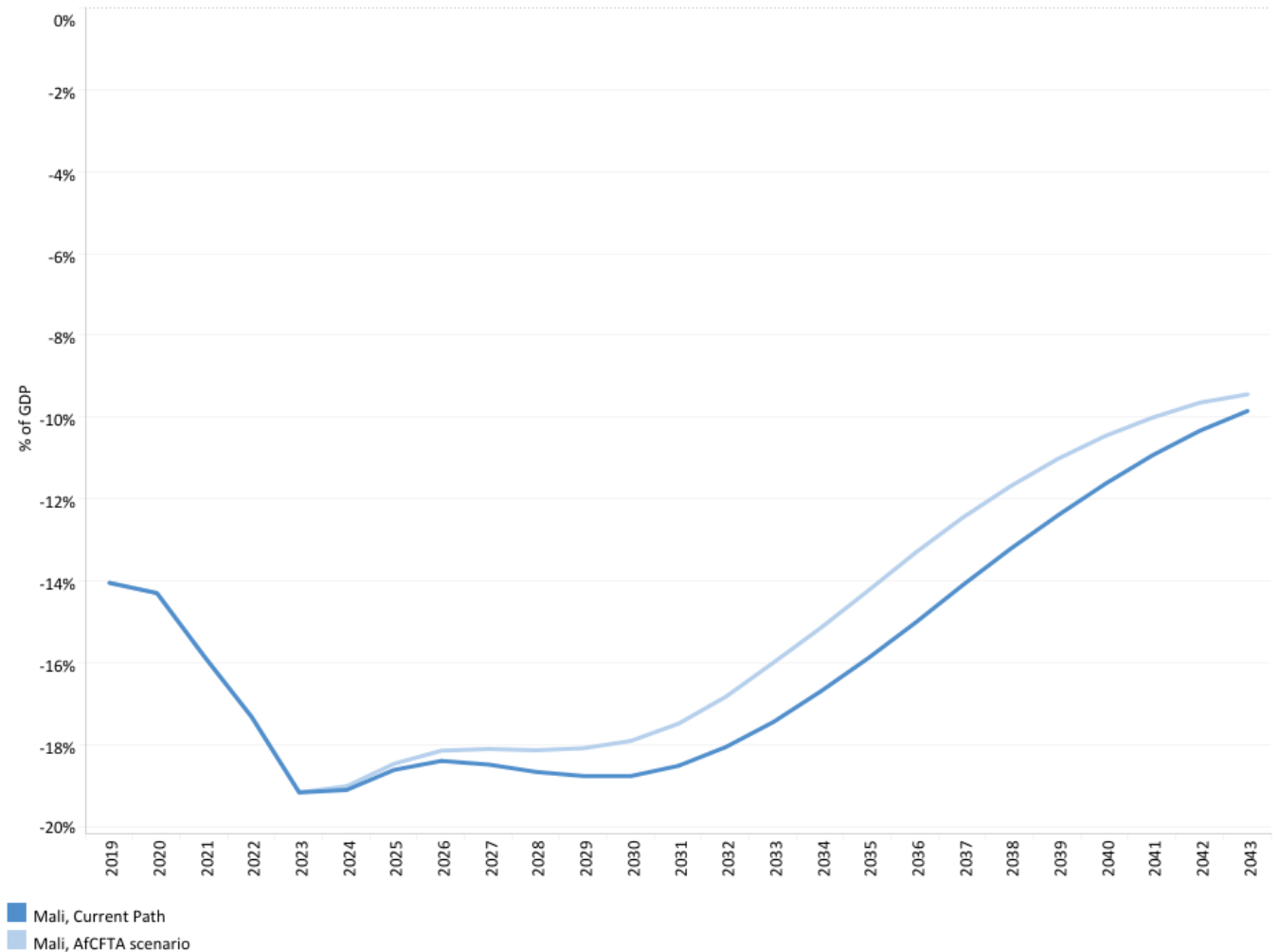
In terms of imports, Mali's total imports grew from US\$1.6 billion, equivalent to 30.9% of GDP in 1990 to US\$7.6 billion, representing 35.6% of GDP, in 2019. At that rate, Mali's total imports as a proportion of GDP were higher than the estimated average of 28.7% for low-income African countries in the same year. The country imports large volumes of refined petroleum (representing 27% of total imports).[44] Other top imports of Mali are broadcasting equipment, packaged medicaments and cement.[45] Imports from Senegal account for 22.5% of total imports into the country. This is followed by imports from China (accounting for 15.8% of total imports), Côte d'Ivoire (10.6% of total imports) and France (7.9% of total imports). Mali also receives significant imports from India and the United Arab Emirates.

There is also a chronic deficit in Mali's trade balance, and exports only cover about half of imports, reflecting a large trade deficit. Like most African countries, it imports large volumes of mostly finished or processed goods. Its export quantities are small, and most of it is raw materials, with little or no value addition occurring within the country. This results in low export revenues and higher import expenditures. Mali's trade deficit in 2019 constituted 12.3% of GDP, which was above the average of 10.3% for low-income African countries.

Chart 20: Trade balance in Current Path and AfCFTA scenario, 2019-2043



Mali



Source: IFs 7.84 initialising from WDI data

Chart 20 compares the trade balance in the Current Path forecast with the AfCFTA scenario.

In the AfCFTA scenario, the sum of Mali’s exports and imports as a percentage of GDP will reach 89.4% by 2043. This will be about 10 percentage points above the Current Path. Throughout the forecast period, the AfCFTA scenario leads to a faster improvement in Mali’s trade balance than the Current Path forecast. By 2043, Mali’s trade deficit in the Current Path will constitute about 9.9% of GDP, whereas, in the same year, the AfCFTA scenario will mitigate this situation leading to a slightly lower deficit of 9.4% of GDP. This is almost at the same level with the average for its income-group peers in Africa. These figures suggest that Mali stands to benefit from the full implementation of the AfCFTA, which will improve competitiveness, particularly in growing the country’s manufacturing sector.

Large Infrastructure and Leapfrogging scenario

Chart 21: Large Infrastructure and Leapfrogging scenario

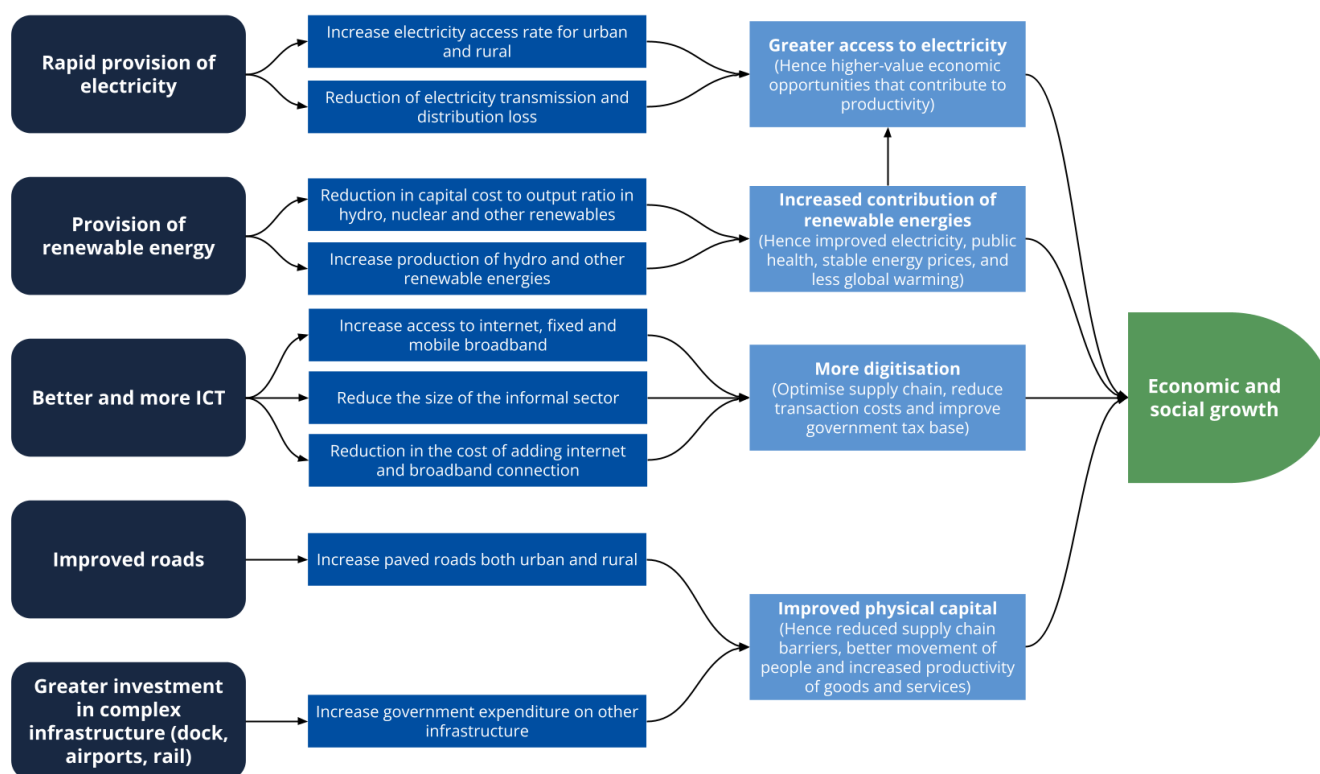


Chart 21 presents the structure of the Large Infrastructure and Leapfrogging scenario as modelled in IFs.

The Large Infrastructure and Leapfrogging scenario represents a reasonable but ambitious investment in road infrastructure, renewable energy technologies and improved access to electricity in urban and rural areas. The scenario includes accelerated access to mobile and fixed broadband and the adoption of modern technology that improves government efficiency and allows for the more rapid formalisation of the informal sector. A final intervention emulates investments in large infrastructure such as rail, port and airports.

Visit the themes on [Large Infrastructure](#) and [Leapfrogging](#) for our conceptualisation and details on the scenario structure and interventions. Chart 21 presents a summary chart that sets out the composition of the scenario.

Modern infrastructure can improve productivity, augment healthy lifestyles, boost educational outcomes and facilitate government effectiveness.[46] The study focuses on both physical and digital infrastructure, including roads, electricity access and ICT. Physical infrastructure, such as roads and railways, is a critical driver of economic growth and an important component of development. It facilitates the movement of people, goods and services, promotes intra-country trade and serves as an enabler of social service provision such as education and health.

Malian authorities continue to make efforts to improve the road network in the country. The creation of a second-generation road fund in 2000 and the inception of a Road Maintenance Executing Agency contributed to improving road infrastructure in the country.[47] In 2019, the total length of roads in Mali was estimated to be 24 175 km of which only 5 522 km, equivalent to 24.6% was paved—this is above the average for low-income countries in Africa. On the

Current Path, by 2043, the total road network in Mali will increase to 54 366 km, of which 17 659 km, or 32.6%, will be paved. By this time, paved roads as a percentage of total roads in Mali will, however, still be below the average of 37.2% in Africa's low-income countries.

Electricity production in Mali is mainly from hydraulic generated power. It comprises 55% of electricity production and diesel accounts for 45%.[48] With an estimated 800 MW of hydroelectric power, potentially unlimited solar energy and over 300 MW of biomass,[49] the country is yet to fully tap into this renewable energy potential to increase production. In 2019, 47.8% of the people in Mali had access to electricity. This was above the average of 33.3% of low-income countries in Africa.

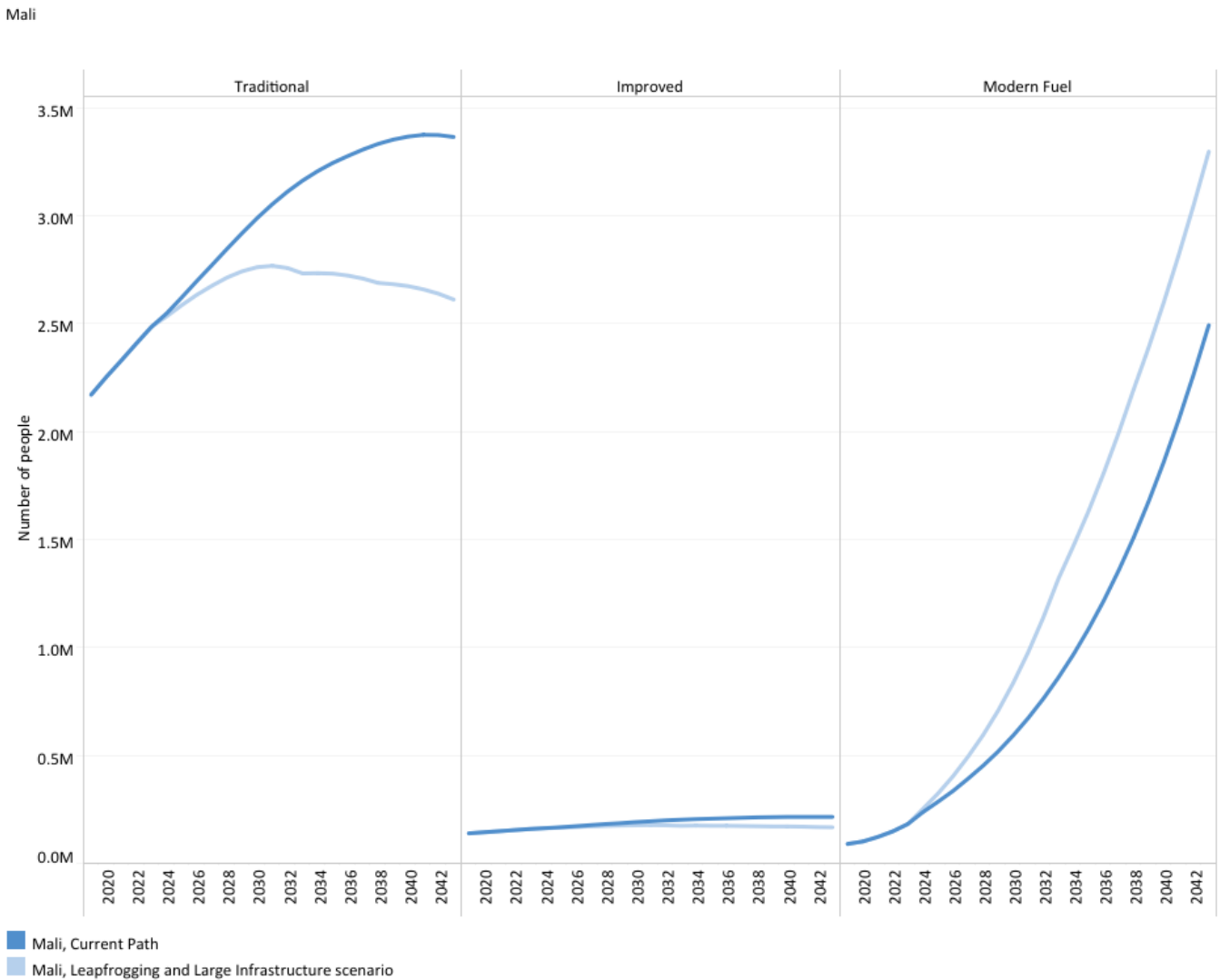
Similar to the trend observed in most low-income countries in Africa, an overwhelming 91.1% of urban residents but only 15% of rural dwellers had access to electricity in 2019, depicting a location disparity in favour of urban areas. Although there has been impressive progress in the implementation of some rural electrification programmes, there is still a long way to go before universal access. On the Current Path, access to electricity is projected to reach 69.5% of the population by 2043, which is above the average of 60.1% for Mali's income-group peers. The disparity in electricity access in favour of urban residents will continue as 97% of urban residents will have access to electricity compared to 36.7% of rural residents by 2043. About 17% of all electricity produced in Mali is lost during transmission and distribution. On the Current Path, this is expected to remain without any effort to avert these losses.

Aside from physical infrastructure, technological advancement is essential for economic growth. Technology improves productivity and reduces the transaction costs and bottlenecks associated with doing business. Mali's progress in fixed broadband access, like many other African countries, has lagged. In 2019, the total number of fixed broadband subscriptions in the country was estimated at about 1.7 per 100 people—slightly above the average of 1.6 per 100 people in low-income Africa. In the Current Path forecast, fixed broadband subscriptions will rise to 31.9 per 100 people by 2043, above the average of 24.8 subscriptions per 100 people for low-income African economies.

In contrast, mobile broadband subscription in Mali is high. The number of people with access to a mobile line grew by 300% between 2004 and 2007, allowing Mali to catch up with its income-group peers and positioning the country among the best performers in West Africa.[50] In 2019, Mali had a mobile broadband subscription rate of 31.3 per 100 people, almost double the average of 18.7 for low-income countries on the continent.

On the Current Path, mobile broadband subscriptions will rise to 153 per 100 people—18.6% above the average of its income-group peers. In terms of Internet usage, only 26% of Mali's population has access to the Internet. Although this is higher than the average usage of 19.6% in low-income countries, it is half of what exists in Gambia, which is the highest among the 23 low-income countries. Also, on the Current Path, Mali's progress is projected to lag behind its income-group peers so that by 2043, the proportion of people with access to the Internet in Mali will almost be on par with the average for its income-group peers in Africa at 22.6%.

Chart 22: Cookstove usage in Current Path and Infra/Leapfrogging scenario, 2019-2043



Source: IFs 7.84 initialising from IEA data

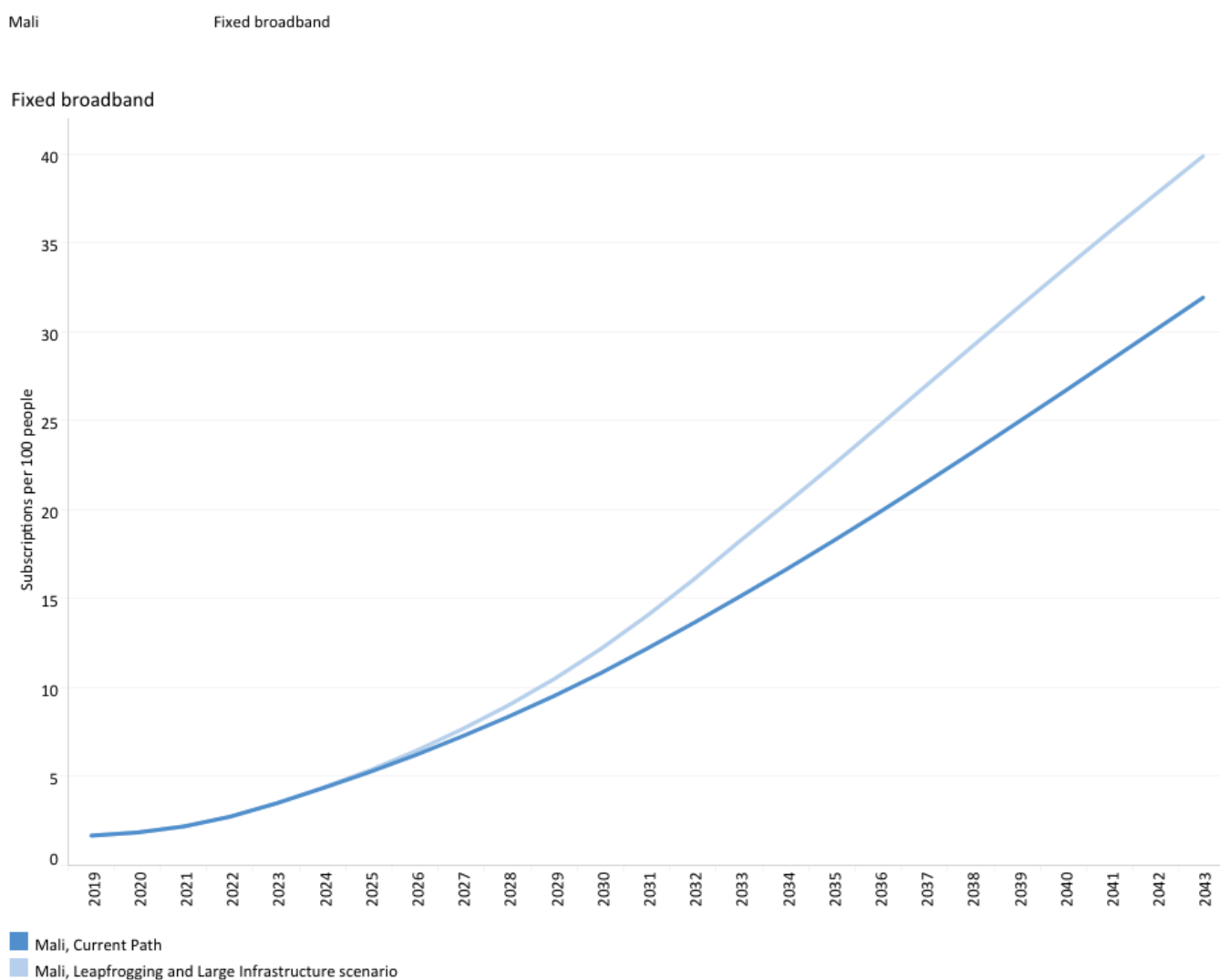
Chart 22 presents cook stove usage in the Current Path forecast and the Infrastructure and Leapfrogging scenario.

The IFs model distinguishes between three types of cooking stoves: traditional, improved and modern. In 2019, 90.5% of households in Mali used traditional stoves with firewood or charcoal for cooking, while 5.8% used improved cooking stoves and 3.7% used modern stoves for cooking. A similar trend is observed in most low-income countries in Africa with 88% of using traditional cooking stoves. An overwhelming majority of people in Mali, therefore, still rely on traditional stoves for cooking, which contributes to pollution and carbon emissions and negatively impacts the health of these households. However, as access to electricity in urban and rural areas increases, more households will likely switch from traditional cooking stoves to improved and modern fuel stoves, such as electric and gas cookers.

Based on the Infrastructure scenario, it is projected that 80% of Malians will have access to electricity by 2043, compared to 69.5% in the Current Path forecast. Also, all Malians living in urban areas will have access to electricity in the scenario and the proportion of people with access to electricity in rural areas will improve to 56.4% in the scenario instead of 36.7%

in the Current Path. Consequently, only 43% of households will use traditional stoves compared to 55.4% in the Current Path forecast by 2043. As a result, 54.3% of households in Mali are expected to use modern fuel for cooking in the Infrastructure scenario. This is close to the average for the country's income-group peers at 59.7%, compared to 41.2% in the Current Path forecast by 2043. Clearly, this will reduce health-related diseases and carbon emissions arising from the use of traditional cooking stoves in the country.

Chart 23: Access to mobile and fixed broadband in Current Path and Infra/Leapfrogging scenario, 2019-2043



Source: IFs 7.84 initialising from ITU data

Chart 23 presents access to mobile and fixed broadband in the Current Path and the Infrastructure and Leapfrogging scenario.

The Infrastructure scenario will lead to a larger increase in fixed broadband access, so that, by 2043, subscriptions will likely be at 40 per 100 people compared to 32 subscriptions on the Current Path. This is above the average of 24.8 for low-income African countries. Owing to the high performance in improving access to mobile broadband in the country, in the Current Path forecast, reaching 153 subscriptions by 2043, the Infrastructure scenario has only a marginal impact. The

Infrastructure scenario will peak at 156 subscriptions per 100 people by 2038 and remain so till 2043—higher than the average of 129 for Africa’s low-income countries.

Financial Flows scenario

Chart 24: Financial Flows scenario

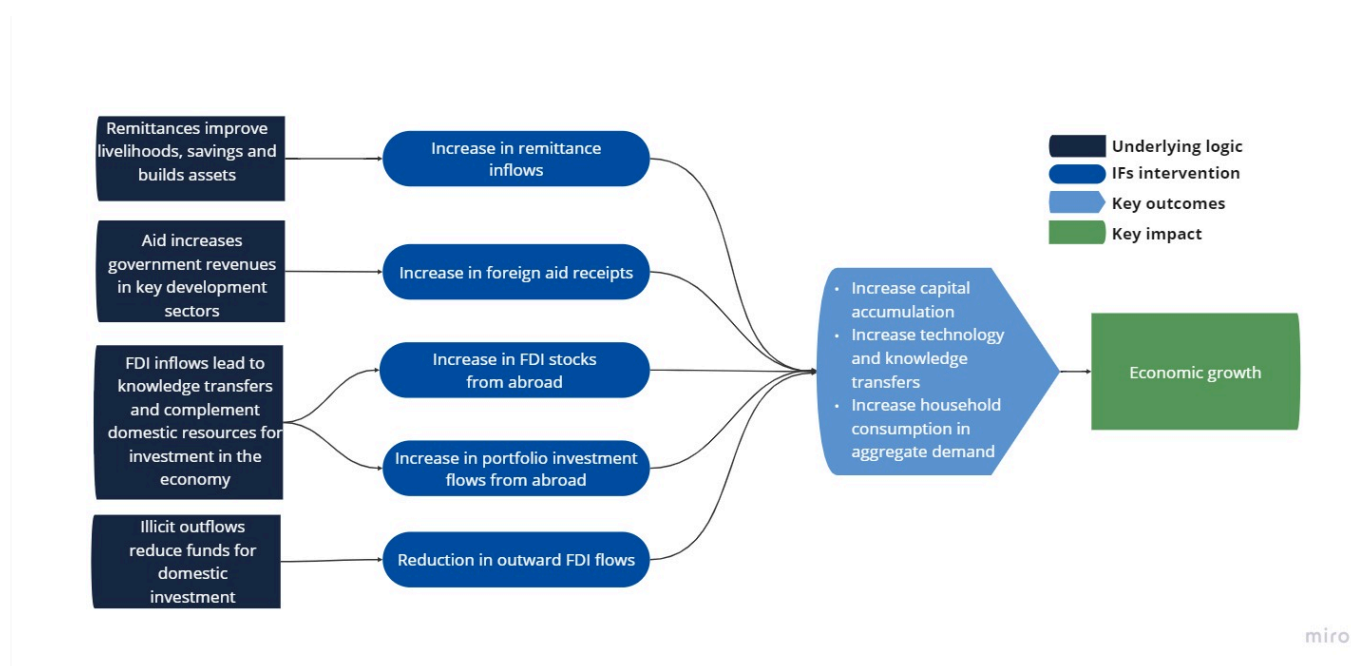


Chart 24 presents the structure of the Financial Flows scenario as modelled in IFs.

The Financial Flows scenario represents a reasonable but ambitious increase in inward flows of worker remittances, aid to poor countries and an increase in the stock of foreign direct investment (FDI) and additional portfolio investment inflows. We also reduce outward financial flows to emulate a reduction in illicit financial outflows.

Visit the theme on [Financial Flows](#) for our conceptualisation and details on the scenario structure and interventions. Chart 24 presents a summary chart that sets out the composition of the scenario.

FDI inflows to Mali, like most low-income countries, are historically low. In 1990, the total FDI inflow to Mali was equivalent to a paltry 0.2% of GDP—on par with the average for low-income countries in Africa. By 2019, FDI inflows to Mali reached 4.2% of GDP above the average of 3.8% of GDP for low-income African countries. The majority of the FDI received by Mali is destined for oil extraction, gold exploitation, the textile industry, telecommunication, infrastructure and financial intermediation and comes from France, China and the US, Canada and India.[51]

In 2020, Mali was ranked 148 out of 190 countries in the World Bank's Ease of Doing Business 2020 Report. This reflects the poor business environment and numerous obstacles to investing in Mali. The country's fragile political situation, persistent insecurity, especially in the northern part, and underdeveloped business environment are the main reasons for the low FDI in the country.[52] Other obstacles to attracting foreign investment to Mali include corruption, economic sanctions and the poor state of infrastructure in the country. Businesses in Mali have to grapple with corruption in procurement processes, land administration, tax payment and customs procedures.[53]

Prior to the coups, the government put in place various measures to attract more FDI. This is to be achieved by encouraging competitiveness and private sector participation in all sectors of the economy, with particular attention given to sectors such as agribusiness, fishing and fish processing, livestock and forestry, mining and metallurgical industries, and

tourism and hospitality industries.[54]

There have also been efforts to undertake financial and economic reforms, such as improving fiscal transparency and reducing corruption to attract FDI. In this vein, the government committed to improving public financial management practices and increasing tax revenue by strengthening revenue collection agencies, ensuring tax compliance and reducing fraud in tax administration.[55] On the Current Path, FDI inflows are expected to marginally decline to 3.7%—this is significantly below the Current Path average of 5.2% for low-income countries on the continent by 2043.

Prior to the 2020 coup, Mali had received relatively more foreign aid than other low-income African countries. In 1990, the total aid received by Mali constituted 14.2% of GDP, compared to 11.3% received by other low-income African countries in the same period. By 2019, total aid as a percentage of GDP stood at 18%, equivalent to US\$941 million. This was almost twice the average of 9.2% for other low-income countries in Africa. Mali received aid from diverse donor sources. For instance, in 2022, US bilateral foreign assistance to support the country's development amounted to US\$148 million. Likewise, the EU also provided a total €47.3 million in humanitarian aid to Mali. A large proportion of aid received by Mali is spent on food, basic essential goods or emergency shelter, health and nutrition and education, among others.[56] On the Current Path, foreign aid is projected to decline to 6.2% of GDP, although the absolute value will increase to US\$4.1 billion. However, this will still be higher than the average of 4.6% of GDP for other low-income countries in Africa.

Remittances in Mali are high compared to its income-group peers in Africa. In 2019, Mali received US\$856 million in remittances, constituting 4.3% of GDP, well above the average of 2.5% for low-income African countries. It could mean that there are more Malian migrants than its income-group peers, or Malian migrants have sent relatively higher remittances home than in other low-income countries. Most of the remittances are for household consumption and development and provision of basic infrastructure in high emigration areas, mainly rural areas. The majority of the Malian diaspora is found in France, Spain and Italy, suggesting a large inflow of remittances from these countries.[57] On the Current Path, remittances to Mali is expected to increase to US\$2.1 billion (3.2% of GDP), exceeding the average of 0.4% of GDP projected for low-income countries.

Chart 25: Government revenue in Current Path and Financial Flows scenario, 2019-2043

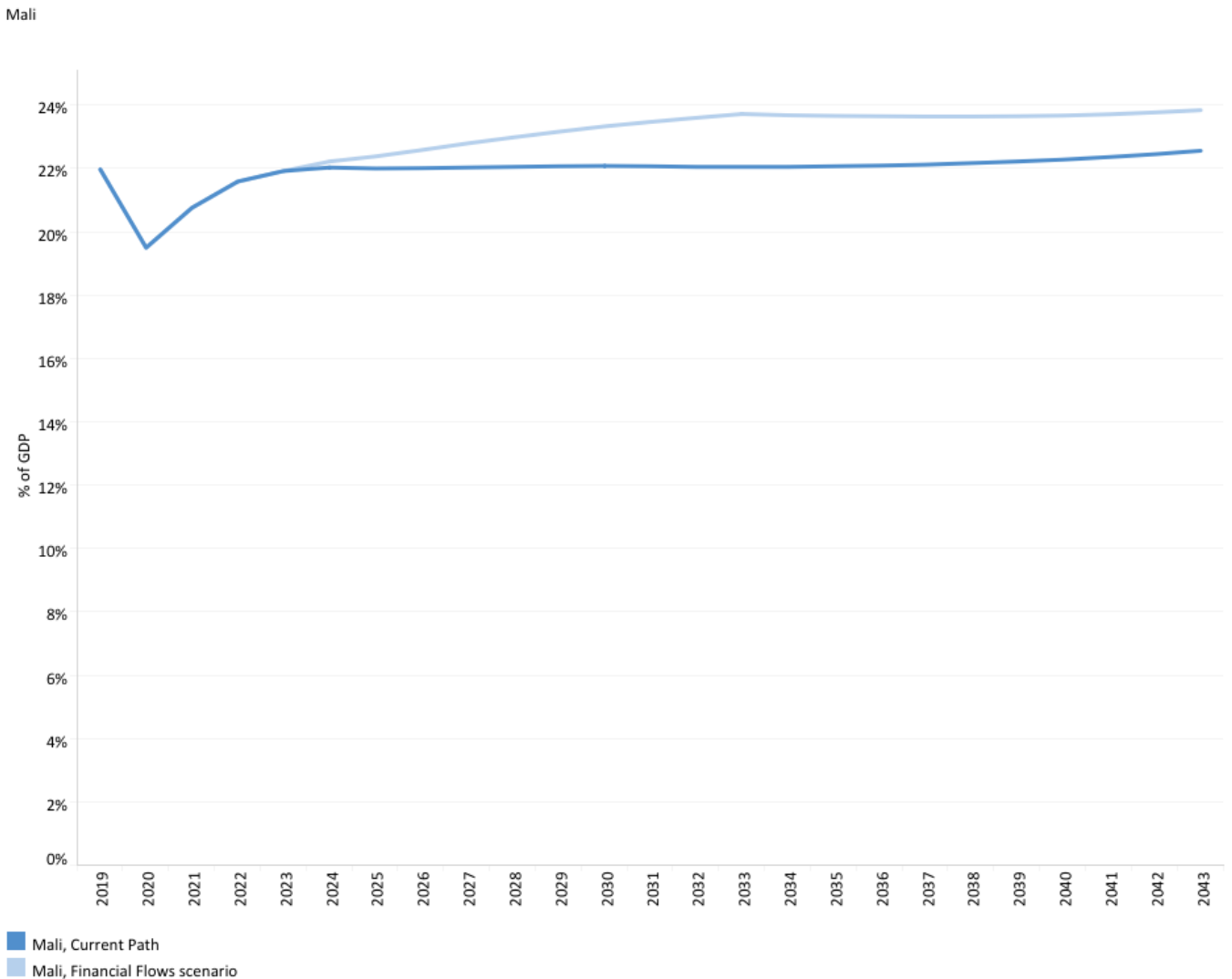


Chart 25 presents government revenues in the Current Path and Financial Flows scenario.

Wagner's law, or the law of increasing state activity, is the observation that public expenditure increases as national income rises. It is, therefore, reasonable to expect that government revenues will increase as a per cent of GDP in the Financial Flows scenario compared to the Current Path forecast.

Higher external inflows in the form of FDI, aid and remittances have increased government revenue. For instance, increased FDI means higher GDP growth, which in turn increases revenues accrued to the government through corporate and income taxes, royalties and indirectly through value-added tax. In 2019, the government's total revenue in Mali amounted to US\$4.4 billion, equivalent to 22% of GDP—higher than the average of its income-group peers in Africa. Similarly, Mali's revenue without aid, estimated at 11.4% of GDP, is above the average of 9.7% for low-income countries in Africa.

In the Financial Flows scenario, government revenue is projected to rise to US\$15.8 billion in 2043, representing 23.8% of GDP above the average of 21.5% for low-income countries in Africa in the same year. Compared to the Current Path, the Financial Flows scenario can improve government revenue in Mali by almost an extra US\$1 billion by 2043.

Governance scenario

Chart 26: Governance scenario

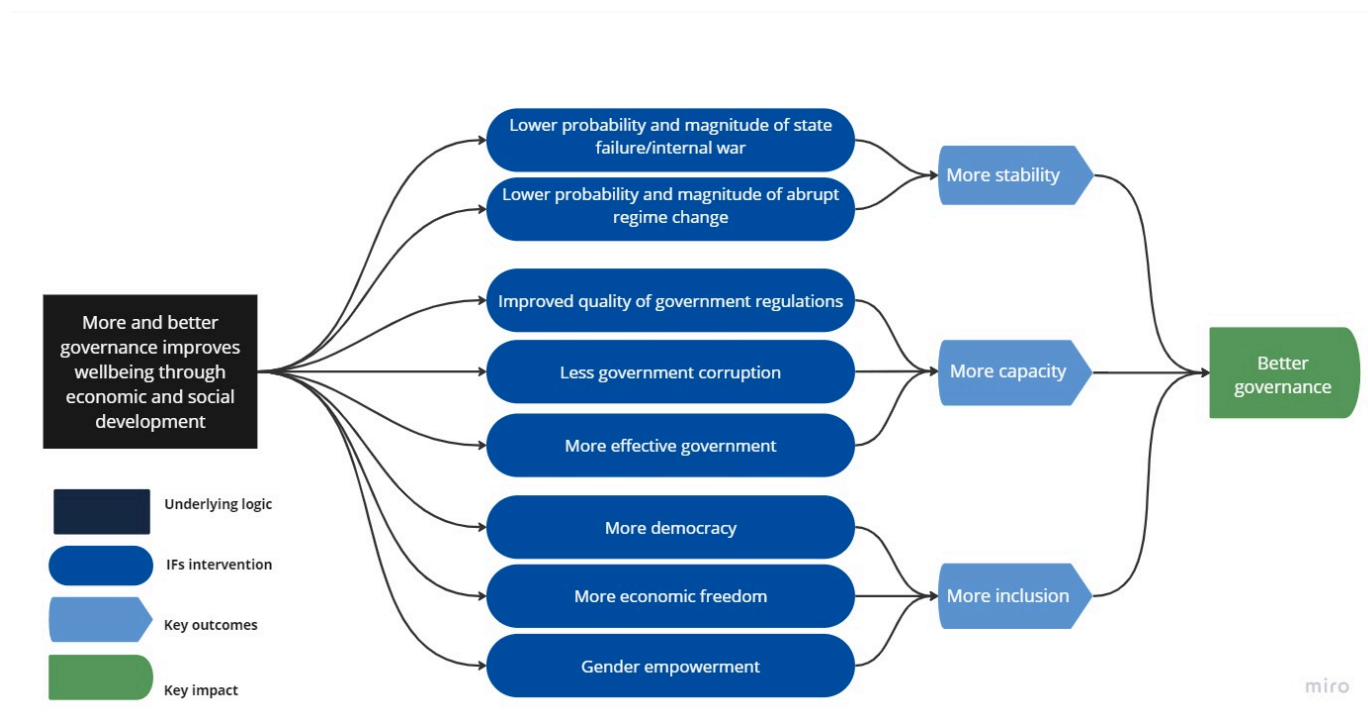


Chart 26 presents a summary chart that sets out the composition of the Governance scenario as modelled in IFs. Thinking of governance in terms of security, capacity and inclusion provides a useful lens to compare how countries progressed over time, as well as compare the state of governance between countries and groups of countries.

The stability dimension uses data from the Political Instability Task Force on:

- the probability and magnitude of state failure/internal war, and
- the probability and magnitude of abrupt regime change.

Capacity is enhanced by improving the quality of government regulation, government effectiveness (both from the Worldwide Governance Indicators) and reductions in corruption using data from Transparency International.

Inclusion improves as a result of:

- an improvement in levels of democracy using the Polity IV index applied to those countries that evidence a democratic deficit,
- an improvement in gender empowerment using the gender empowerment measure (GEM) from the United Nations Development Programme (UNDP), and
- more economic freedom (using the associated index from the Fraser Institute).

Visit the theme on [Governance](#) for a conceptualisation and details on the scenario structure and interventions.

Stability and better governance are generally prerequisites for other aspects of development as they ensure accountability, efficient allocation and distribution of state resources and encourage inflows of FDI. To emulate the sequential evolution of governance over time, IFs draw on the establishment of nation states in the Westphalian tradition that first created a security community (through internal oppression and war with others), built capacity (largely through the collection of taxes and the establishment of a coercive social contract) and then, in time, became more inclusive and eventually, democratic. Traditionally, these transitions occurred sequentially with progress in one dimension providing a basis for the next.

The process of externally imposed state formation during colonialism in Africa did not follow this process. The result was that many African countries do not comprise a security community and have limited capacity. Yet, they are required to democratise without the fundamentals of sufficient security and capacity being in place. The composite 'governance triangle' in IFs measures a state's progress using the average of these three indices. To this end, it includes an index (0 to 1) for each dimension, with higher scores indicating improved outcomes.

Mali's performance on the governance security index is marginally better than that of its peers on the continent. Its score of 0.67 for 2019 before the 2020 coup was 4.5% higher than the average of 0.64 for low-income countries in Africa. This is despite Mali's history of insecurity, political instability and the threat of terrorism and rebel groups. For instance, since 2012, Mali has experienced political instability, with two coups in August 2020 and May 2021 truncating the democratic processes in the country. The country's stability is also continuously threatened by internal armed conflict and attacks on civilians by security forces, rebel and militant groups leading to the displacement of people and loss of lives and livelihoods.[58] In 2022 alone, the clashes between the Islamic State in the Greater Sahara and Jama'at Nasr al-Islam wal Muslimin led to the displacement of over 30 000 Malians to Ménaka, in eastern Mali.[59]

Violence in the country has escalated since 2015, with various attacks linked to al-Qaeda and Islamic State leading to the deaths of thousands of people and displacement of over six million people.[60] Despite the presence of the UN peacekeepers, French troops and other missions, including the recent deployment of the Wagner private military company from Russia, the number of terror attacks and Malians joining insurgent groups in the country has steadily risen over the years.[61] The interim government has asked the UN peacekeeping mission known as MINUSMA, which has been in the country since 2013, to leave the country as a result of mistrust between the government and the mission. The UN Security Council subsequently voted to terminate its mission.[62] On the Current Path, it is projected that Mali's score on the governance security index will reach 0.73, compared to the average of 0.71 for low-income African countries, by 2043.

Regarding governance capacity, Mali's score in 2019 of 0.28 was about 12% higher than the average of low-income Africa but declines to 3% by 2043. The most important reason is that government revenue as a percentage of GDP for Mali (without aid) was 11.4% of GDP, exceeding the average of 9.7% of GDP of low-income countries in Africa. Similarly, the country's performance on the World Bank government effectiveness index is better than its peers. Its score of 1.4 in 2019 ranks it 11th of the 23 low-income countries and above the group average.

Despite the progress in government capacity, the country is still lagging behind in fighting corruption. Most of the corruption cases are through procurement. It currently ranks 137th out of 180 countries globally on the Transparency International Corruption Perception Index (CPI) with a score of 28. This is a seven-point decline from its peak of 35 in 2015.[63] Corruption permeates every state institution in the country, creating mistrust among the public. The 2019 global corruption barometer reports that 60% of Malians (almost a double of what was recorded in 2015) believed corruption has increased in the last 12 months.[64] The high level of corruption is likely to weaken government effectiveness in the country. On the Current Path, Mali's progress on the governance capacity index will be slower than the average for its income-group peers such that by 2043, its score of 0.34 will be almost equal to the average for low-income countries in Africa.

Just like the security and capacity index, Mali's performance on the Governance Inclusion Index is higher than its income-group peers in Africa. In 2019, Mali scored 0.49 on the inclusion index, which was about 16.7% above its income-group peers on the continent rated at 0.42. Mali's democracy score on the Polity index ranks ninth out of the 23 low-income countries in Africa, above the average for low-income African countries. However, it lags behind countries such as Guinea Bissau and Sierra Leone. The country also currently ranks 15th out of the 23 low-income countries, and by 2043 will deteriorate to 17th position on the economic freedom^[65] index by the Fraser Institute.

Mali ranked 19th out of the 23 low-income countries on the UNDP gender empowerment index in 2019. The 2020 Gender Inequality Index also ranked Mali 184th globally with gender-based violence and inequality still prevalent in the country.^[66] Historically, female representation in government has been low in Mali and consistently below the 30% global benchmark. For instance, women's representation in the national parliament has declined since its peak of 12% in the 1990s.^[67] Between 2010 and 2013, only 9.5% of seats in the national parliament were occupied by women.^[68]

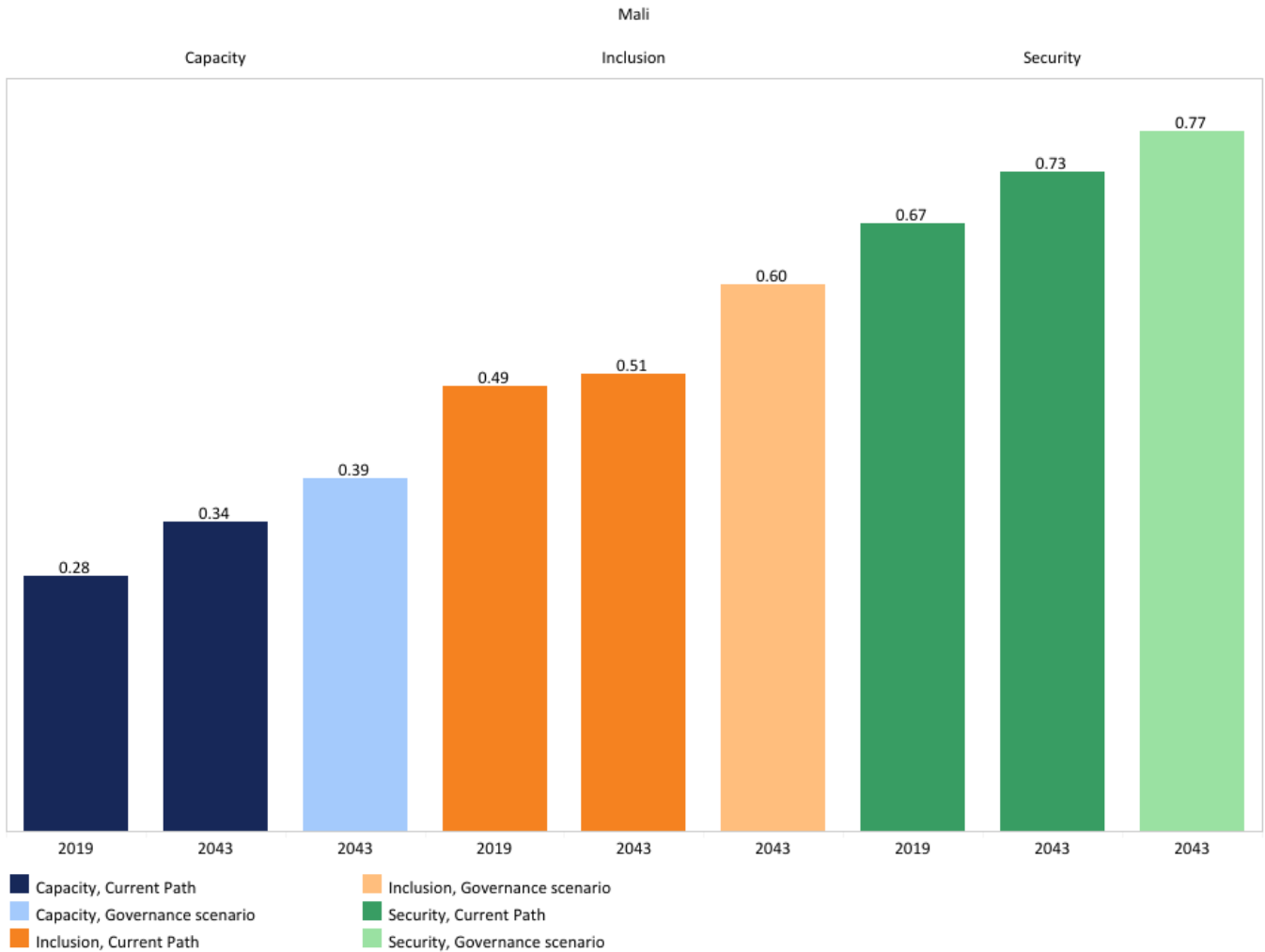
The marginalisation of women in government led to the enactment of the 2015 Gender Quota Law that requires at least 30% of females in nominated or elected positions. As a result, the 2020 elections witnessed the highest female representation of 29% in the national parliament.^[69] Even with the quota rule, women are still underrepresented in almost all political spheres. Women make up 23.6% of the national government, 1% and 5% of interim administration at the regional and district levels, respectively. Also, only 6% of the National Council for Security Sector Reforms, 3% of the National Commission on Disarmament, Demobilization and Reintegration and 20% of the Truth, Justice and Reconciliation Commission are women.^[70]

On the Current Path, Mali will progress slowly so that by 2043 the country's score on the Governance Inclusion Index will still be 6.3% below the average of low-income countries in Africa.

Chart 27: Composite governance index in Current Path vs Governance scenario, 2019-2043



Mali



Source: IFs 7.84 initialising from WGI and TI data

Chart 27 presents progress with each of the three governance dimensions by 2043 in the Current Path and Governance scenario compared to 2019.

In the Governance scenario, Mali's score on the governance security index will improve to 0.77, which is about 6.2% above the Current Path forecast by 2043 and about 8.4% above the Current Path average of low-income Africa in the same year. Governance capacity is also expected to also improve in the Governance scenario, with its score increasing to 0.39 by 2043, constituting a 14.4% improvement above the Current Path forecast and 16.8% above the average of its income-group peers on the continent. In terms of inclusion, the Governance scenario will improve Mali's score on the Governance Inclusion Index by 19.4% above the Current Path forecast, reaching 0.60 by 2043. In the scenario, Mali's score is 26.9% higher than the average of low-income countries in Africa in 2043.

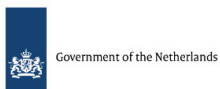
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