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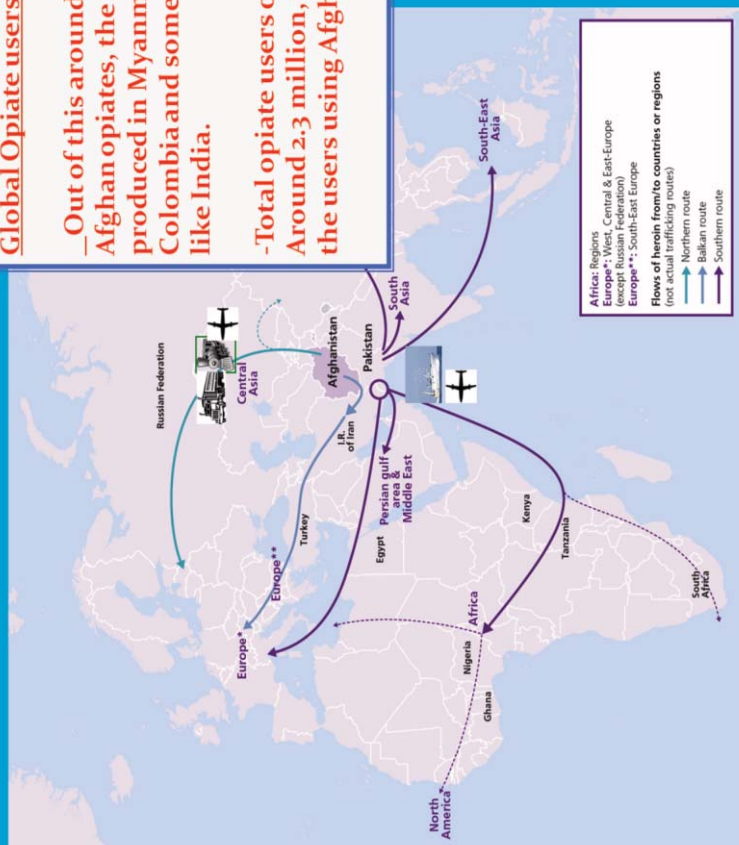
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Major routes of trafficking of Afghan Opiates – Share of Northern Route

Global Opiate users : around 16 million

— Out of this around 9-10 million is using Afghan opiates, the rest is using opiates produced in Myanmar, Lao, Mexico, Colombia and some other local productions like India.

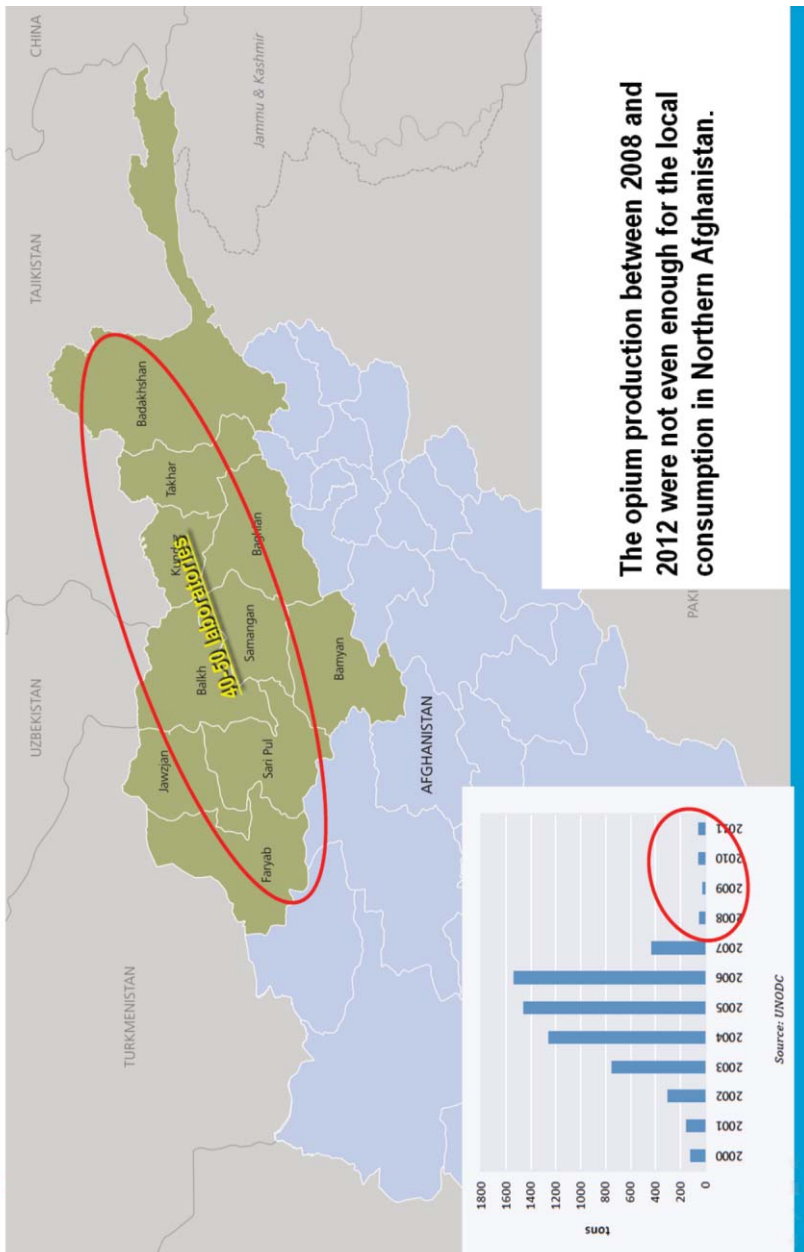
— Total opiate users on Northern Route : Around 2.3 million, which is around 25% of the users using Afghan Opiates (9-10 million)





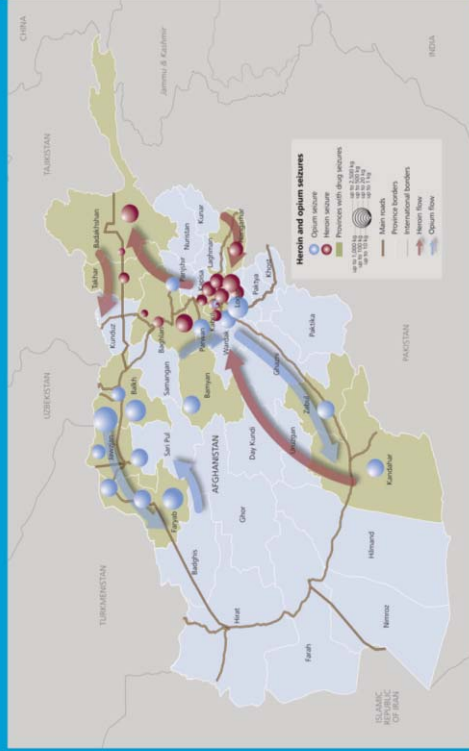
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What is the source of opiates flowing through Northern Route ?



Heroin and opium seizures with confirmed trajectories involving northern Afghanistan

- There are two potential sources to fill the opiate supply gaps in northern Afghanistan:
- 1. Stocks
- 2. Opiates from other regions
- Most heroin comes from the south and east to the north while most opium travels south from the north
- Half of the demand is met by the stocks in Northern Afg.
- The remaining 50 percent is brought from the south and east



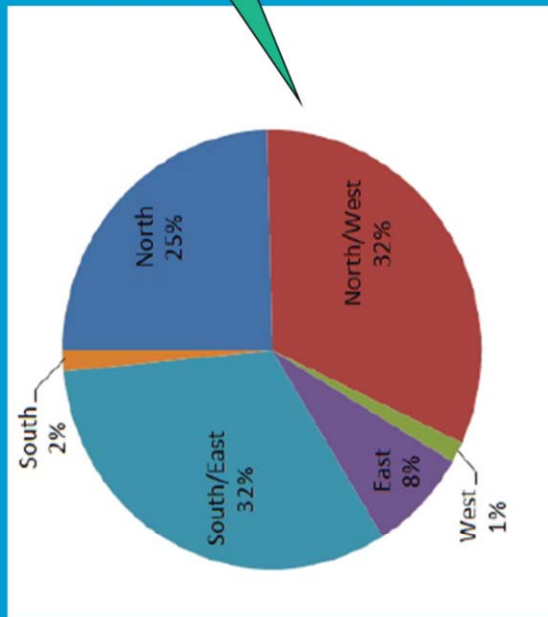


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Source of heroin seized in Central Asia and Russia

Regions of Afghanistan directly and indirectly noted on Stamps seized in Central Asia and Russia





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Cultivation in N. Afghanistan beyond 2012

- By 2012 all stocks in Northern Afghanistan has probably melted. So,
 - Cultivation may increase in Northern Afghanistan in 2013 and further. Indeed, it is already happening.
 - Some of the provinces in Northern Afghanistan may loose their “poppy free “ status.

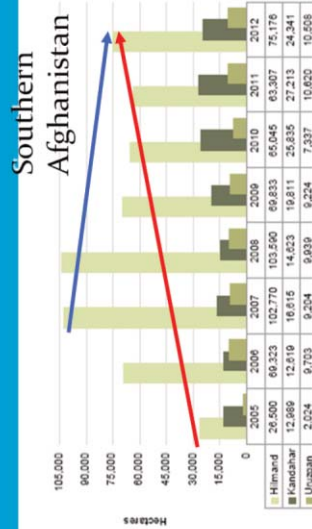
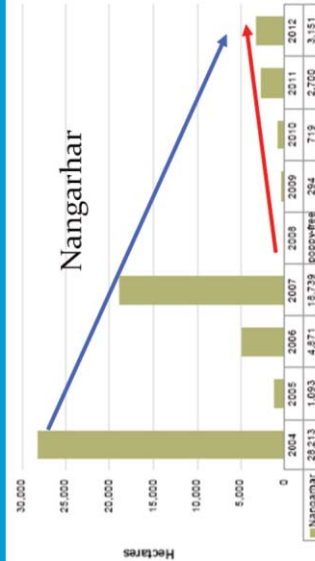
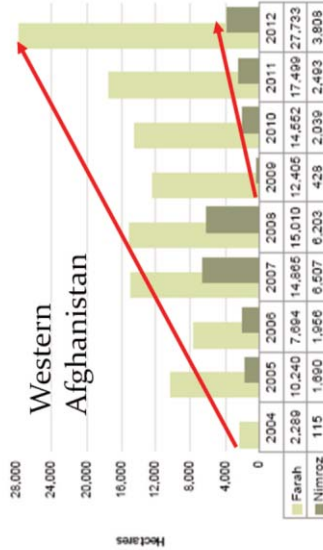
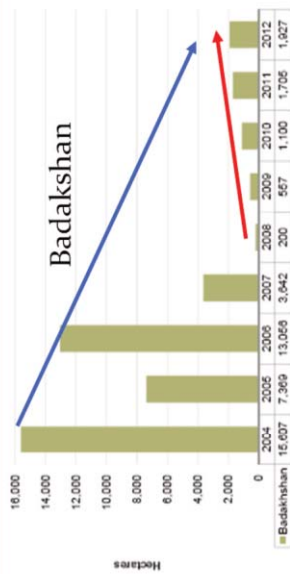




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Trends in opium cultivation in some key provinces, 2004- 2012





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Market value of opiate Consumption in Afghanistan, 2011

Opiate trafficking revenue in Northern Afghanistan

Region	Opium	Heroin	Total
Central Afghanistan	49 588 000	14 933 295	64 521 295
Eastern Afghanistan	13 450 000	3 170 475	16 620 475
Northern Afghanistan	42 717 000	6 719 715	49 437 15
Southern Afghanistan	10 649 000	6 222 960	16 871 960
Western Afghanistan	20 608 000	4 721 310	25 329 310
Total	137 012 000	35 767 755	172 779 755

The value of domestic sales (US\$ 50 million and export sales to central Asia (US\$ 350 million) of illicit opiates in northern Afghanistan is close to US\$ 400 million.

Region	Opium	Heroin	Total
Northern Afghanistan	7 191 410	337 004 300	344 195 710

This is higher than the GDP of provinces in Northern Afghanistan (Badakhshan GDP is estimated at 280 million USD)

Who benefits ?



International Seminar “Challenges in addressing the illicit drugs problems in the context of withdrawal of international forces from Afghanistan in 2014”



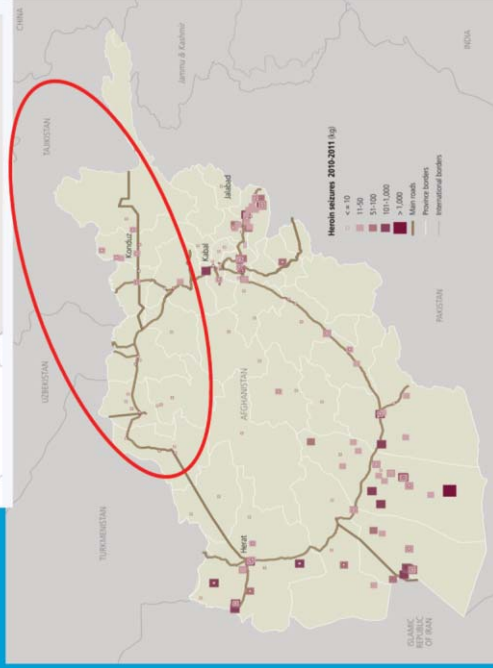
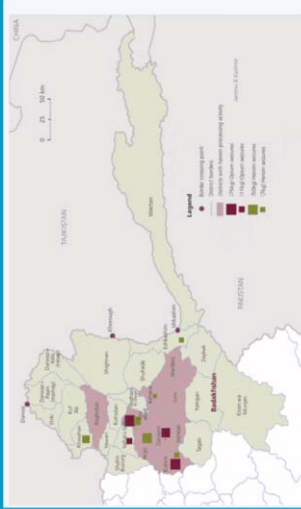
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Low level of opiate seizures

Northern Afghanistan: general risk factors

- No opiate seizures at border crossings in northern Afghanistan in the context of generally low seizures (AA and opiates)
- Lack of capacity is one of the main problem
- The drug trade may be of interest to insurgents in northern Afghanistan
- Trade flows and commercial links growing





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Opiate Interdiction in Afghanistan



Year	heroin (kg)	opium (kg)	morphine (kg)	Total (in opium equivalent - kg)	Total opium production (kg)	Interdiction Ratio
2008	2,782	42,807	479	65,634	5,900,000	1%
2009	2,188	35,687	5,167	87,172	4,000,000	2%
2010	9,030	57,023	5,030	155,443	3,600,000	4%
2011	10,235	80,480	50,800	507,725	5,800,000	9%
2012	8,043	87,210	34,334	383,849	3,700,000	10%

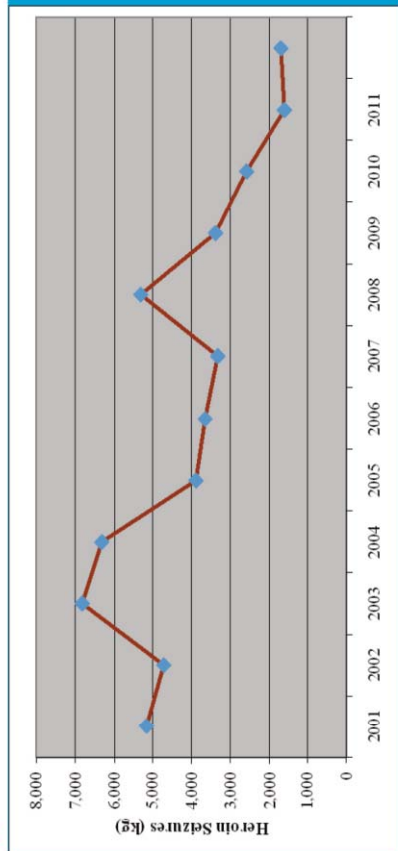




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Decrease in total heroin seizures in Central Asia



Given that no decrease reported in heroin users in Russia in recent years, more or less same level of heroin goes through CA. So, What would be the reason for decrease in seizures in Central Asia ?

- Traffickers changed the method of trafficking through Central Asia? **Likely - like Misuse of Licit Trade....**
- Traffickers are not any more using this route ? **Not likely**





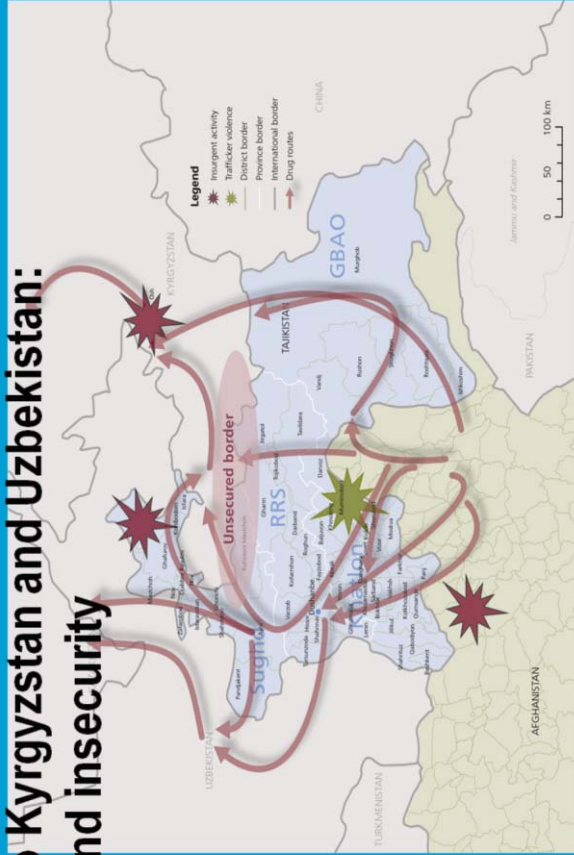
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Routes in Central Asia

From Tajikistan to Kyrgyzstan and Uzbekistan: Drug trafficking and insecurity

- Majority of the opiates flow is going through Tajikistan. Then continues through Kyrgyzstan and Uzbekistan
- By boat across the river or hidden in trucks carrying cement/fruits
- Drug routes overlap with areas of high insecurity and violence
- Shootouts and incursions of traffickers on the Tajik border
- Osh and Northern Tajikistan are hubs for IMU insurgencies and drugs





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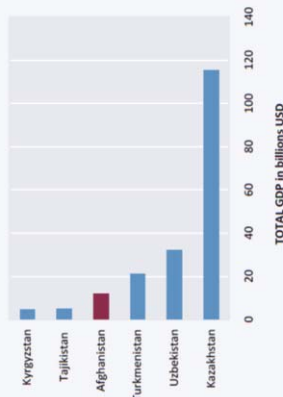
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Opiate Market Value in Central Asia

Value of the opiate market in Central Asia

- Heroin traffickers in Central Asia made a net profit of 1.4 Billion in 2010.
- By way of comparison the GDPs of Tajikistan and Kyrgyzstan are around 5 billion each.
- In the Russian Federation the opiate market is valued US\$18 Billion
- This calculation does not include other drugs such as those of the cannabis group, which are also trafficked through the region.

GDP of Central Asian countries and Afghanistan, 2010



Groups benefitting :

Clan or family based
Well-connected, Integrated Tajik-Afghan groups
West Africans present in \ across the CIS (smaller entrepreneurs)
No Kingpins arrested in Central Asia
Insurgent involvement?



Central Asia: risk factors



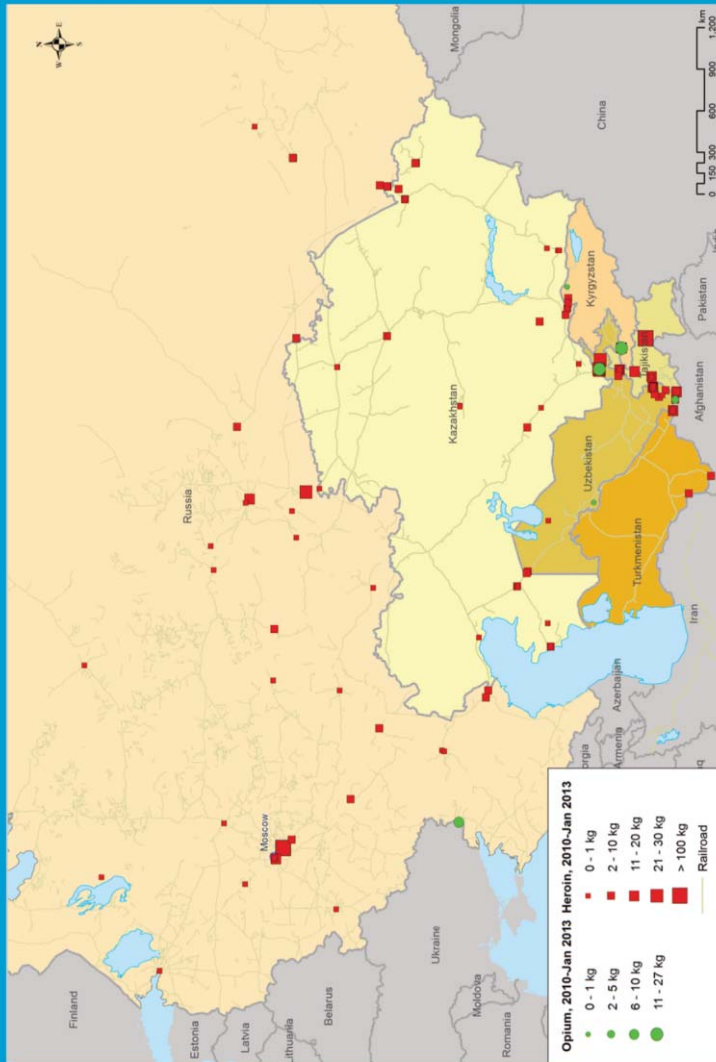
- Hard border control measures need to be supplemented with intelligence sharing and risk assessments.
- No sustained CN cooperation between Afghanistan and two of its neighbors, Turkmenistan and Uzbekistan.
- The challenges on border control between Tajikistan and Kyrgyzstan
- Cooperation through CARICC is not at desired levels
- Increasing trade flows and the customs union.
- Trains are being increasingly targeted
- Public health , increase in consumption



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Seizures at Railways in CA and Russia , 2010-2012





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POST 2014 CHALLENGES

- Level of illicit drug production in Afghanistan =
 - Function of mainly (demand, security, poverty)
- Is it likely that opiate demand will decrease or disappear by 2014 ?
 - *Not expected*
- Would poverty be better in Afghanistan ?
 - Not likely, as most of foreign investment will move out. However it may remain stable
- Would Security be better ?
 - Not clear, depends on internal and external dynamics

So, overall, it is difficult to predict a decrease in illicit drug cultivation in Afghanistan





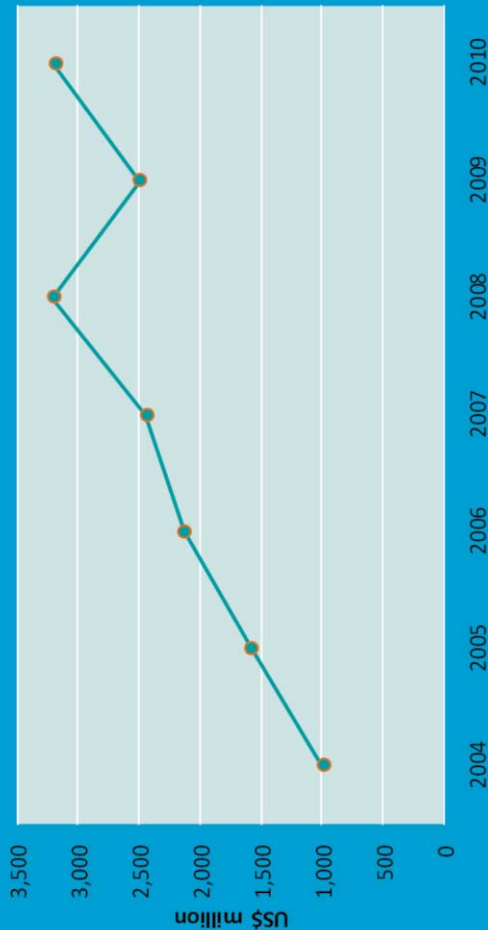
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Challenges – Misuse of licit Trade

- Over the last decade – economic relations between countries in Western and Central Asia improved. A number of trade agreements have been implemented – removing and reducing trade barriers – leading to a surge in trade in the region. It is estimated that it will continue to increase – which is a good news!

Afghan trade with other countries in Western and Central Asia (2004-2010)



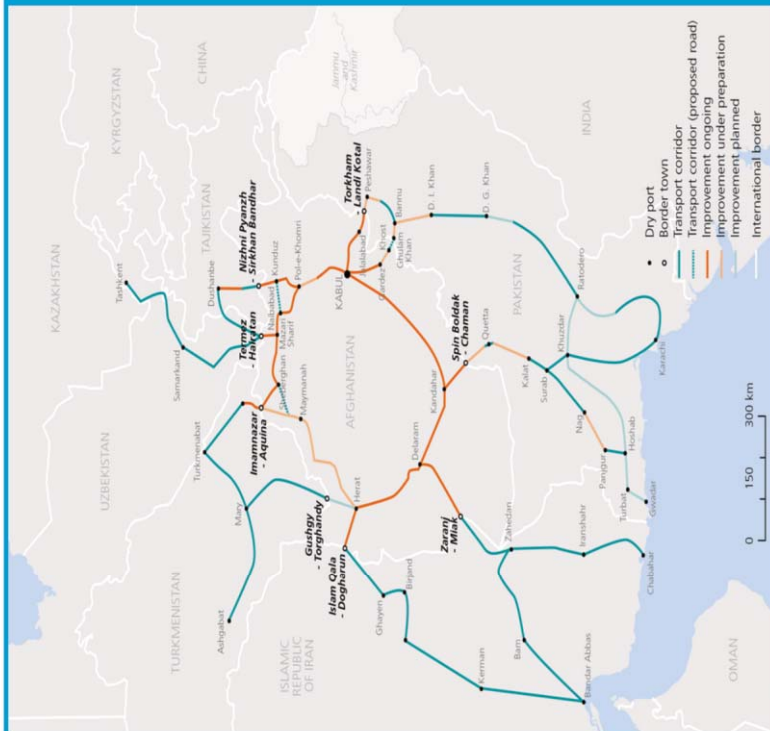


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Misuse of Licit Trade Agreements

- APTTA : October 2010
- SAFTA : 2006
- Afghanistan – Iran Bilateral Agreement : 2005
- Afghanistan – India – Iran : October 2011
- Afghanistan – Uzbekistan transit trade agreement : 2004
- Afghanistan – Kazakhstan : 2004
- Afghanistan – Tajikistan : January 2012
- Customs Union (Kazakhstan- Russia - Belarus) : July 2010





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Challenges...

- Security at Northern Afghanistan and borders with CA countries is an increasing concern..
- Increase in terrorist / anti Government / illegally armed groups activities at these areas. Such as IMU which is also linked with CA .
- Increase in usage of railways of CA (now linked with Afghanistan) by drug traffickers. Drug law enforcement Capacity in railways are very low .
- Counter narcotics capacity at dry ports of CA and Afghanistan are very low. Very likely to be abused by drug traffickers.
- Level of drug demand in CA and Afghanistan needed to be reviewed , as current data is very old
- Public health : Level of treatment capacity in CA countries and Afghanistan is not at desired levels.
- Poverty is an great concern not only in Afghanistan but some CA countries as well.

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Challenges...

- Level of regional cooperation is not at desired levels. Number of control delivery operations are very limited.
- More efficient use of CARICC facilities in the region and linking it with Afghanistan
- Increase in intelligence and information analysis in the region.

Over all : Drug related threat for CA countries and Afghanistan is not estimated to be less then current levels, after 2014. Therefore, there is strong need to improve the efficiency on countering the narcotics in Central Asia.



Thank you

Contact us:

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Post 2014 Afghan Scenarios: Knowns and Unknowns around the Narcotics Trade

Ever since the United States and NATO declared their intention to partially withdraw their troops from Afghanistan in 2014, there have been a number of different narratives depicting expectations over what would happen after that year. On the one hand, the positive narrative, perpetuated by Afghan politicians and the public, reflects some hope for the post-2014 period, a year which is supposed to see presidential elections and the full responsibility over security matters by Afghan National Security Forces (ANSF). Among Central Asian (CA) governments, this more positive outlook brings hopes that a potentially stable Afghanistan would open up larger markets and transit routes for the export of their oil, gas and electricity. On the other hand however, the narrative of fear predicts a potential breakdown of stability within Afghanistan, with its repercussions for spillover instability in Central Asia, as well as border areas of Pakistan and Iran. This more cautious narrative rests on the assumption that porous borders and general lawlessness in a weak Afghanistan, should elections not go smoothly and should the ANSF not be able to control rising insurgency, would increase the rates and change the nature of criminality in the region, with more trafficking of not only narcotics but also arms, goods and people across borders into CA countries.

What are the implications specifically on the trade of narcotics in the region of the different interpretations, positive and negative, of what will happen in Afghanistan post-2014? After the different scenarios are examined from the point of view of implications on narcotics production and trafficking, this paper explores a number of known and unknowns that should be more carefully scrutinized in order to assess the real dangers of the spillover factor.

Scenarios and their implications for narcotics production and trafficking

Within the different possible narratives about the the post-2014 period, three scenarios can be mentioned, from the most positive to the most negative ones. Although these are extremely simplistic and caricature depictions, they are presented here from the implications they may have on CA security concerns related to narco production, trafficking and the criminal/extremist nexus.



1) *The most positive: The Nirvana Scenario*

The most positive scenario relies on a successful, smooth and peaceful political transfer of power with the 2014 elections. It rests on an assumption about the emergence and strengthening of the unified centralized state which will survive political transition and the withdrawal of combat troops. The *nezam* (governance system), in this scenario, is inclusive, participatory and includes representatives of all ethnic groups. The result is the creation of a positive example of democratic elections, and a state that is respected by its citizens. This scenario also sees a degree of decentralization: Former warlords and strongmen presiding over different regions are given autonomy over their territory but abide by loyalty to the central presidential (or parliamentary) system and put their strength behind a capable (and fair) national leader. This peaceful coexistence eases the pressure on CA states to have to form alliances with co-ethnic strongmen in order to protect their interests in case there is a bleeding chaos. CA countries stay neutral, refrain from interfering politically in Afghanistan but take advantage of national peace by expanding their economic and energy infrastructure projects beyond Kabul and the north to the south.

Within this positive scenario, the national economy is supposed to be revamped through boosted productive agriculture, infrastructure for trade, transit and tourism. It no longer needs to run on illicit trade in narcotics. Alternative sources of lucrative trade are sought in the development of cross-border trade, transit of oil and gas to markets in South Asia, development of infrastructure for alternative job creation, etc. Small cross-border trade flourishes among communities in northern Afghanistan. With the state having gained more legitimacy through elections, it would have more power, together with its capable law enforcement forces, to respond to the problem of production and trafficking, curb the illegal activity of non-state actors, cut down on corruption etc.

This scenario, of course, has a number of flaws, the most structural one being the assumption that the post 2014 state, by virtue of having a legitimate post-elections government, will also have the capacity to be efficient. Since aid will no doubt decrease with the outflow of foreign donors, the force of the government is supposed to come from the contribution of citizens willing to abide by its rules, pay their taxes, bring investments, and build their country. All this, especially, for the good of a unified, centralized system.

Yet, this scenario ignores the ability of the licit economy to pick up in a way, especially in the absence of donor aid and in a short period of time, to offset the illicit drug economy. It also assumes that non-state actors, such as mafia groups involved in narcotics trafficking, are more likely to act out of nationalism and the interest of their nation as opposed to selfish – but much more realistic – self

