



High-Level Conference on:

Water for Agriculture and Energy in Africa: the Challenges of Climate Change

Sirte, Libyan Arab Jamahiriya, 15-17 December 2008

National Investment Brief

SOMALIA

EXECUTIVE SUMMARY:

With a population of 8.7 million in 2007 (WB), and an income per capita estimated in 2002 to be \$226 compared to \$515 in Sub-Saharan Africa, Somalia is one of the poorest countries in the world having high under nourishment levels with 36% underweight and Human Development Index ranked at 161 out of 163 countries in 2001. The civil conflict since 1991, continuing insecurity in many parts of the country, and poor access to services and infrastructure have made conditions worse than they were before the civil war. There is increasing concern regarding impoverishment and destitution amongst the Somali population leading to increased levels of aid dependence with perpetually high rates of acute malnutrition above emergency levels.

Agriculture contributes 60% to the GDP. The domestic cereal food demand is estimated at 0.5 million tons compared to the 0.2 million national production. Maize and sorghum production has been on average 60 percent below the pre-war average. Generally, the north has a higher food security due to better physical security, compared to the south and central areas.

The climate of Somalia is mainly arid to semi-arid. Given the environmental degradation and ecological changes that have happened overtime due to misuse of the country's fragile natural resources, the country is highly vulnerable to climate change and variability. The agricultural sector, which is the main livelihood for the Somali people, is expected to be hardly hit by natural hazards arising from climate change. Currently Somalia has not adopted any agenda/policies for climate change adaptation due to absence of policy making institutions.

Somalia has scarce water resources with high pressure on the only two perennial rivers in Southern Somalia for irrigation purposes. Extensive irrigation schemes existed in the Juba and Shabelle river basins growing mainly bananas, sugar cane, rice and cotton for domestic use and export. The schemes have however collapsed at the civil strife, and only a small percentage of the land is currently under cultivation after donor rehabilitation efforts. There are no large dams in Somalia and hydropower has never been generated, with diesel generators being the main source of energy.

The country's national development agenda is guided by the European Commission Strategy: Special Aid to Somalia - SAS (2002-2007), EC Joint Strategy Programme for Somalia (JSP) for 2008-2013, World Bank/UNDP joint strategy: Country Re-engagement Note - CRN (2003-2006) and the, UN Transition Plan (UNTP) for Somalia for 2008-2009: Rehabilitation and Development Programme (RDP). The focus of the three strategies is to contribute to the alleviation of poverty, building peace and improving security and governance, creating an enabling environment for private sector-led growth to expand employment and reduce poverty. Major constraints on development are scarce water resources, poverty and food insecurity in the rural areas, general insecurity and civil conflicts.

The financial envelope for the medium-term investment strategy is US\$302million for the medium term. There are a number of projects to address global soaring food prices funded by the World Bank under the Rapid Response Rehabilitation of Rural Livelihoods (RRRRLP). Other upcoming agricultural projects are the north western regions irrigation project and UN CAP 2009 projects. These projects span from 2008 - 2010. The agricultural projects that have just been completed and that are on-going include crop diversification, support & strengthening local communities' economy, food security and nutritional analysis and, natural resources information management are 19 with funding above US\$2million to US\$5.5million. There are no bank investment projects that are currently found for Somalia.

1. CONTEXT

1.1 AGRICULTURE AND FOOD SECURITY

Agriculture

Agriculture is a major activity in the livelihoods of Somalis, providing food requirements for domestic consumption and generating income through sale of crop and animal products. According to UN statistics, agriculture contributed 60% of Somalia's US\$2.1 billion GDP in 2004. Livestock production is predominant in the country, especially the arid lands of northern and central Somalia. Livestock exports are a major source of foreign exchange and revenues. In 2008 more than 3 million sheep and goats were exported through the northern ports of Berbera and Bossaso, and in the south, although official statistics are not available, informal cross border cattle trade to Kenya is significant. It is estimated that 67% of the population obtain their subsistence needs from camels, cattle, sheep and goats. In the riverine areas of Juba and Shabelle, and parts of north-west Somalia agro-pastoralism is practiced. Rain fed agriculture is only practised in small areas in north-west and southern Somalia where annual rainfall is between 400 – 600mm.

Before the collapse of the Somali government in 1990, crop production at large scale was practiced, mainly in the south. Extensive irrigation schemes existed in the Juba and Shabelle river basins growing mainly bananas, sugar cane, rice and cotton for domestic use and export. The schemes have however collapsed at the civil strife, and only a small percentage of the land is currently under cultivation after donor rehabilitation efforts. Agricultural production changed from commercial large scale to subsistence farming which hardly meets the local demand. A majority of Somalis depend on a narrow range of livelihoods, in particular livestock and farming. These are vulnerable in particular to climatic factors (floods and droughts), environmental factors, and politico-economic factors, such as foreign bans on livestock imports, and local conflict.

Crop production in both the rain fed and the irrigated areas in the south-central regions, where most of Somalia's crops are grown, has suffered greatly from the negative effects of the civil war. Banana production is a fraction of its pre-war levels, as all banana exports have ceased. Grain production was almost 80 percent lower in 1993 and is still about 60 percent lower than in the pre-war years due to the on-going conflict, natural hazards and destruction of the production systems. As a result, Somalia is a net importer of cereal, with 60% of the country cereal needs met through commercial imports and the increasing amounts of food aid. The most binding constraints to realizing the agricultural sub-sector's high productive potential in southern Somalia are insecurity and roadblocks that raise the cost of farming and land occupation that displaced many skilled farmers and prevented investment. Other constraints such as lack of credit and extension services and poor irrigation and transport infrastructure are common to both southern and northern regions.

Irrigation and water control

Somalia has a great potential for irrigation along the two perennial rivers, Juba and Shabelle. The former government did a lot to exploit this potential. In 1988, the ministry of Agriculture estimated that 112,950 ha of land were under controlled irrigation. It was also estimated that during the same period 110,000 ha were under flood recession irrigation (deshek) in the country, making the total irrigated land in the country to be over 222,000 ha. Majority of the irrigation in Shabelle is done under gravity through a network of canals, identified to be in excess of 5,000 Km long. In Juba, pump irrigation was more pronounced. In 1990 it was estimated that 125-140 pumps of capacity 150-170 Litre per second extracted water from the river.

The irrigation infrastructure however collapsed slowly after the civil strife. None of the ten pre-war barrages along the Shabelle is fully operational at present, while canals are silted and over grown by vegetation, mainly due to neglect and lack of maintenance. Less than 50% of the pre-war irrigation schemes in southern Somalia are currently operational. In the mountainous regions in north-west Somalia, small pockets of land are cultivated along the seasonal streams (togas) or irrigated from boreholes and springs.

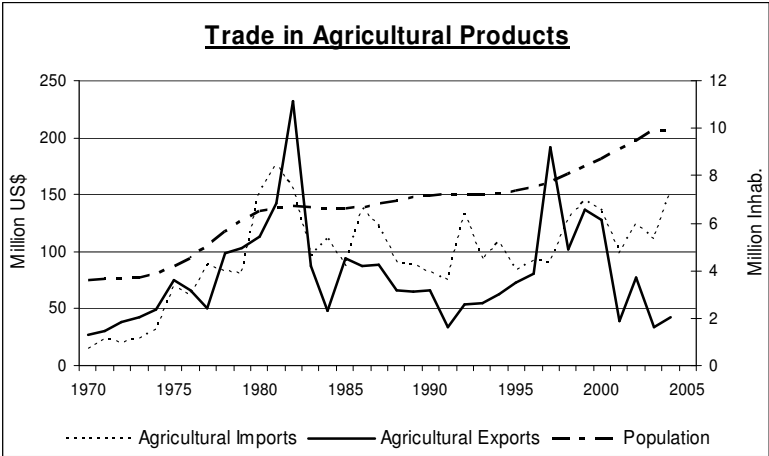
Food security

Somalia is one of the most food insecure countries in the world where more than 1 million people require humanitarian assistance every year just to survive. Over the last 20 years the lack of investment in the productive sectors combined with the destructive force of civil war and natural disasters has eroded people’s livelihoods and ability to cope. As a result, Somalia portrays a very high level of undernourishment, being 71 percent of the population undernourished, according to FAO (2003). Currently, the country is one of the worst humanitarian emergencies in the world, with almost half the population, or 3.3 million people, requiring livelihood support and/or humanitarian assistance, FAO-FSAU (2008). The 2008 nutrition surveys conducted by FSAU and partners in South Central Somalia reported a median Global Acute Malnutrition rate (GAM) of 18.6% which is above the emergency threshold of 15%. This translates into one in six children as acutely malnourished and requiring nutritional rehabilitation.

Food and agriculture trade and import balance

The local production of mainly sorghum and maize does not meet the food demands and it is estimated that another 450,000 tonnes of cereals are needed to meet the domestic food demands of 600,000 tonnes. Maize and sorghum production has been on average 50 percent below the pre-war average. Agricultural exports amounted to US\$185 million in 1997, before dropping to level close to 43 million US\$ in 2004, and the main commodities were live animals, meat, and skins mainly to Saudi Arabia. The sum of agricultural and non agricultural imports amounted to US\$314 million in 2000 and the main commodities were petroleum products, food stuffs, and construction materials. If only agricultural imports are considered, they reached 153 million US\$ in 2004, with the highest share of the bill given by cereals (71% in 2004).

The informal private sector boomed in money transfers and telecommunications, and construction and trade have become more important. Bananas were the most important export crop before the war and annual export exceeded 120,000 tonnes. Many of the banana farms were rehabilitated between 1993 and 1996, but El Nino 1997/98 floods and the fragile status of the irrigation infrastructure left most of the farms abandoned. Changes in the import regime, particularly to the EC and Italy, have led to a further collapse of the market. The few remaining commercial farms in southern Somalia have attempted with the help of EC to diversify into other crops, such as sesame, groundnuts, and rice.



1.2 WATER RESOURCES AND HYDROPOWER

The water resources of Somalia are characterised by nine river basins, but only the Juba and Shabelle Rivers in the southern part of the country are the dominant perennial rivers. Other rivers and streams have surface water only after high rainfall events and normally drain into either the Indian Ocean, or the gulf of Eden due to their flashy nature. However there is high storage potential for sub-surface dams from these streams. Two third of the catchments of the Juba and Shabelle rivers originate in the Ethiopian highlands and some parts in Kenya with over 90% of their runoff originating from outside the country.

Groundwater resources are limited and fragmented because of the limited recharge due to the hot and arid climate and highly variable rainfall. In the northern regions, some subsurface flows in the wadis

are tapped for domestic and small irrigation use. Water resources monitoring networks have collapsed immediately after the civil war in 1991, while information on transboundary water resources does not exist. Most of the rural population rely on either surface water that are collected during the rainy season for storage or , brackish and saline water tapped from the bottom of seasonal streams that leads to serious health problems affecting the human population. More studies are needed for exploration of the groundwater potential. There is no sufficient information on soils formations and hydrogeology to support further studies, with only FAO SWALIM recently started collecting basic data on strategic groundwater sources.

Water resources have an extensive and pervasive influence in the economy of Somalia. Much of the social, economic and environmental system is conditioned by an uneven distribution of resources, and stress put on water resources through competing demands. Due to weak water resources institutions, the majority of the water resources systems have deteriorated due to lack of proper catchment management practices leading to erosion and sedimentation, change of river morphology, diversion of water courses for irrigation purposes creating major conflicts over the country's limited water resources.

Before the civil war, the Water Development Agency (WDA) was the major public institution responsible for rural and urban water development and management. After decades of struggle and conflict with private wells' owners and armed militia, UNICEF has managed to establish urban water supply systems for certain major urban centres through Public Private Partnership (PPP). Revenue collection is done through PPP utility managers and utilised for system maintenance and expansion, however, the high migration rates to urban centres due to the conflict have lead to high pressure on the ground water resources for these urban centres.

There are no large-scale storage reservoirs and dams within Somalia, but off-stream storage existed in the pre-war era at Jowhar (200 million m³), upstream from the greater part of the irrigated lands and downstream of the Jowhar sugar estate to augment irrigation water during the dry season. Currently the reservoir has been filled up with silt, overgrown by vegetation and, people settled in its bottom. Currently there is no hydropower generated in Somalia with only old feasibility studies carried out in the 80's as part of a proposed dam for construction at Bardhere for hydropower generation in the middle section of the Juba River. The dam could have also provided maximum water control and storage in the Juba Valley irrigation projects downstream - Marere Sugarcane Project (MSP). Before the war and currently, the country relies heavily on diesel generator for energy its demands.

1.3 CLIMATE CHANGE

The climate of Somalia is mainly arid to semi-arid. Given the environmental degradation and ecological changes that have happened overtime due to misuse of the country's fragile natural resources, the country is highly vulnerable to climate change and variability. With the current complex emergency situation, the country has been left with very little time or none to address climate change issues. Extreme climate events like floods and droughts have become frequent phenomena over the last few decades. The sector that is expected to be hardly hit by natural hazards due to climate change is the agricultural sector which is the main livelihood for the Somali people. Currently Somalia has not adopted any agenda/policies for climate change adaptation due to absence of policy making institutions.

2. NATIONAL STRATEGIES FOR WATER, AGRICULTURE AND ENERGY

2.1 POLICY CONTEXT

There is a wide variation in the political, economic and development situation across Somalia. The country has been striving for a lasting peace to the civil conflict since 1991. A reconciliation conference in Kenya in 2002 under the auspices of IGAD has lead to formation of the current Transitional Federal Government (TFG) in 2004. The regions of Somaliland and Puntland are experiencing comparative stability and have succeeded in establishing nascent, if yet weakly capacitated government institutions. Due to absence of functioning institutions, systems and, procedures on the national level there have only been collaborative approaches between the World Bank, UN and NGOs for emergency assistance.

The Joint Needs Assessment (JNA) for Somalia, led by the UN and World Bank with Somali partners, found that the absence of government is a major cause behind the weak development situation in Somalia. Insecurity deters investment and prevents service provision. Despite high remittance inflows to Somalia, poverty is widespread; in 2002 around 43% were estimated to live on less than US\$1/day with malnutrition rates above the critical emergency levels. An estimated 60% of the population depends on subsistence livelihoods gained from livestock and agriculture, which make them more vulnerable to droughts, floods and other environmental hazards. Somalia is unlikely to achieve any of the MDGs set during the world forum on sustainable development.

The JNA resulted in preparation of the Reconstruction and Development Programme (RDP) in consultation with the authorities. The absence of peace has yet prevented a donor conference, but the RDP serves as a main basis for support by the international community. It is built around three overall goals: deepening peace, improving security and establishing good governance; investing in people through improved social services; and creating an enabling environment for private sector-led growth to expand employment and reduce poverty. Based on the RDP and with the aim of supporting transition from a humanitarian focus to recovery and development, the UN Country Team for Somalia have formulated the UN Transition Plan for Somalia for 2008-2009, around which agencies are now harmonizing their programmes.

Reliable economic and development data are hardly available for Somalia. The broad picture, however, is that since 1991 economic growth and human development in Somalia have not been able to take place in this environment of political instability. But with the absence of a functioning central government, the international community, including the European Union and the World Bank, have been developing and implementing various poverty reduction and development strategies for Somalia. The World Bank has been collaborating with the United Nations Development Programme (UNDP) and other UN agencies in efforts to re-engage Somalia. Multiple, incoherent and internationally-driven poverty reduction and development strategies have existed in Somalia since outbreak of the war in 1991. The following are the most recent and important strategies:

- European Commission Strategy: Special Aid to Somalia – SAS (2002-2007).
- Joint Strategy Programme for Somalia (JSP) (2008-2013) prepared by the EC in association with Denmark, Finland, France, Italy, Sweden, UK and Norway.
- World Bank/UNDP joint strategy: Country Re-engagement Note – CRN (2003-2006).
- UN Transition Plan (UNTP) for Somalia for 2008-2009.

The greatest challenge in addressing the dire needs of Somalis, in follow-up to humanitarian assistance, will be investment and technical assistance to rehabilitation of the irrigation infrastructure in order to build community capacities for sustainable food security and recovery of livelihoods, livestock sector development through animal medical services for disease control to enable export, manage natural resources in a sustainable manner and increase the awareness and use of a broader range of energy options. Private sector involvement in irrigation development through rehabilitation of inactive infrastructure, promotion of private sector irrigation schemes are potential areas for exploration.

2.2 INVESTMENT ENVELOPE

The investment envelope for the short, medium and long term is presented in the Table below and expressed in million US \$ (based on CAADP investment projections. There is no new information currently available in the literature consulted).

Time scale	Type of investment (million US\$)			Total
	Small scale water control	Rehabilitation of irrigation infrastructure	Large scale hydraulic projects	
Short-term	195	26	20	241
Medium-term	123	62	117	302
Long-term	62	12	241	314
Total	380	100	378	858

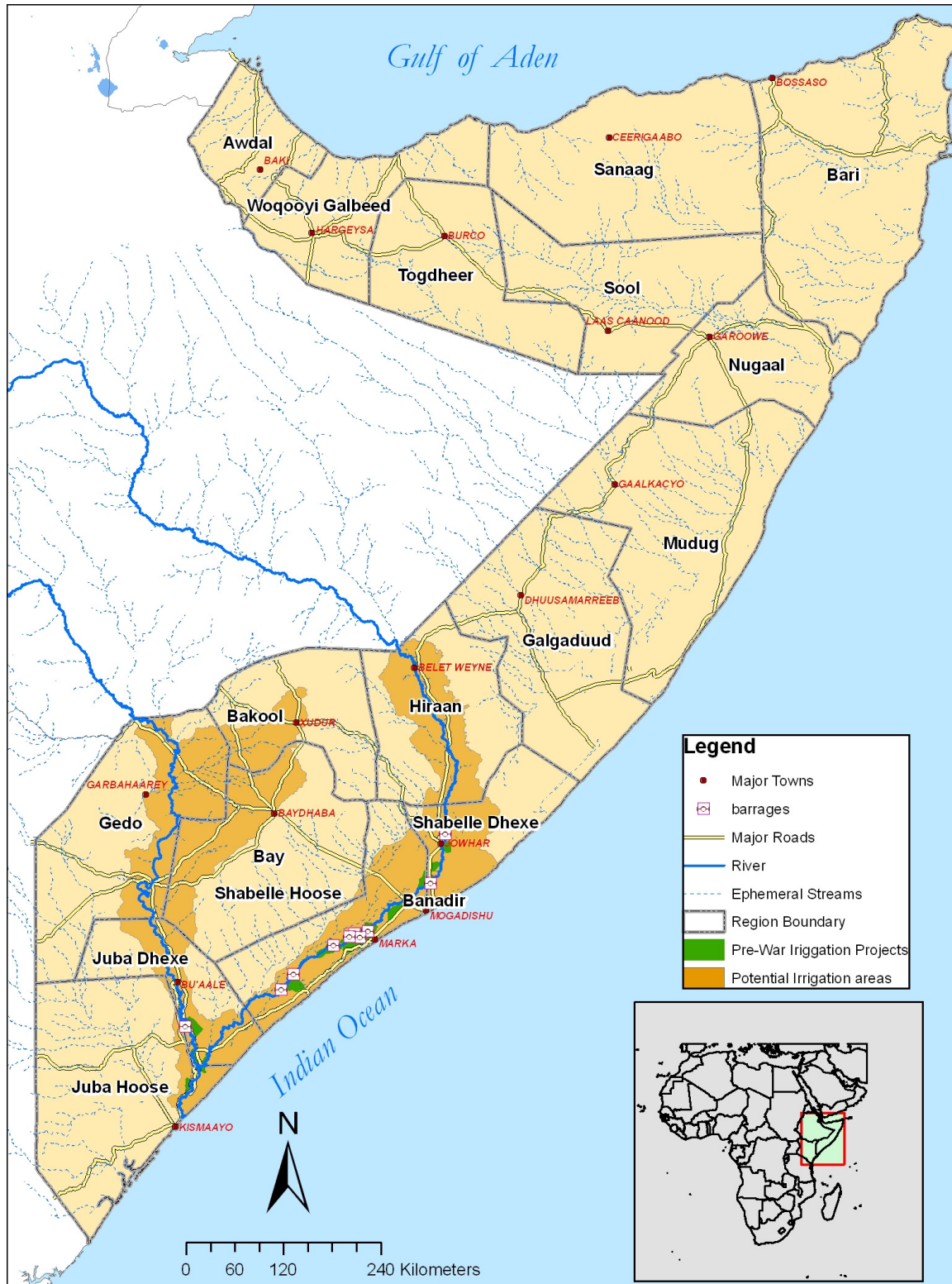
2.3 PROJECT PORTFOLIO

Section 3 presents recently achieved, active and pipeline projects related to the above investment envelope. It is clear that most of the funds are currently directed towards supporting the humanitarian crisis with little focus on national economic development, poverty reduction and, addressing issues related to achieving the MDGs.

3. PROJECT PROFILES (ON-GOING AND PROJECTED)

Project Title	Funding Partners	Time Scale	Total Budget (US\$)	Description
I. PROJECTS RECENTLY IMPLEMENTED				
Somalia Water and Land and Information Management - SWALIM Phase-II	EC	2005-2007	4,725,000 US\$	Recovery & reconstruction of lost natural resources (water and land) information and databases
ARDOPII-I: Agricultural Rehabilitation and Diversification of High Potential Irrigation Schemes in Southern Somalia (Jamama, Agfoi and Balad Districts)	EC	2006-2008	2,839,314 US\$	Support to irrigation infrastructure rehabilitation in the former banana growing areas in Lower Juba and Shabelle River Basins, food security
ARDOPII-II: Agricultural Rehabilitation and Diversification of High Potential Irrigation Schemes in Southern Somalia (Merka and Qoryooley districts)	EC	2006-2008	3,567,399 US\$	Support to irrigation infrastructure rehabilitation in the former banana growing areas in Lower Shabelle River Basin, food security
Emergency river management and support to productive infrastructure	Ireland/U NDP	2007/2008	1,200,000 US\$	Rehabilitation of barrages (Beletweyne, Balad, Sabuun), rural road repairs support irrigation infrastructures, support to construction of community markets and granary stores, construction of three flood relief canals, construction of 10 community water catchment dams
II. ON-GOING PROJECTS				
North-western Integrated Community Development Programme	IFAD	2001-2007 (expected)	EUR5.5 million	Specific activities include: (i) constructing wells and improving access to safe water supplies; (ii) setting up small-scale irrigation systems; (iii) rehabilitating access roads; (iv) building local capacity (v) boosting agricultural and livestock productivity; (v) introducing measures to control soil erosion; (vi) promoting activities that generate on-farm and off-farm income; (vii) providing training in credit management.
Regional Support Programme for the coordination and capacity strengthening for disaster and drought preparedness in the Horn of Africa	EC	2008-2009	4,154,892 US\$	Preparedness for natural hazards and disasters
Somalia Water and Land and Information Management - Phase III	EC	2008-2009	3,068,000 US\$	Recovery and reconstruction of lost natural resources (water and land) information and databases
Support to the Sustainable Management of the Shebelle and Juba Rivers in Southern Somalia	EC	2006-2009	2,204,059 US\$	Construction of water resources databases to support IWRM & policy development
III. PIPELINE PROJETS				
Irrigation Consolidation and Development of better farming systems in the Middle and Lower catchments of the Dur-Dur Watershed, Awdal Region, Somaliland	EC	2008-2010	2,800,000 US\$	Agriculture and food security
Support to UN Consolidated Appeals Process - Somalia 2008	Sweden	2008-2009	2,696,000 US\$	A number of interventions in the agriculture and water sectors beside aerial photography data for irrigation and flood management
RRRRLP - Rapid Response Rehabilitation of Rural Livelihoods	World Bank	2008-2010	7,000,000 US\$	Global rising food crisis response - Rural livelihood support/development - agriculture and rural development and MDG's - implemented by FAO

ANNEX 1: MAP OF DRAINAGE BASINS, IRRIGATION POTENTIAL AND BARRAGES IN SOMALIA:



ANNEX 2: COUNTRY STATISTICS

Country and population								
Area of the country	2005	63766	1000 ha					
Cultivated area as % of the total area of the country	2005	2.2	%					
Total population	2007	8700	1000 inhab					
• of which rural	2005	64	%					
Population economically active in agriculture	2005	2572	1000 inhab					
• as % of total economically active population	2005	69	%					
• female	2005	50	%					
• male	2005	50	%					
Economy and Development								
Gross Domestic Product (GDP) (current US\$)	2004	2100	million US\$/yr					
• value added in agriculture (% of GDP)	2004	60	%					
• GDP per capita	1990	137	US\$/yr					
Access to improved drinking water sources								
Total population	2006	29	%					
Urban population	2006	63	%					
Rural population	2006	10	%					
Water Resources and management								
Average precipitation	2007	180.1	10 ⁹ m ³ /yr					
Total actual renewable water resources	2007	14.7	10 ⁹ m ³ /yr					
Dependency ratio (transboundary rivers)		59.2	%					
Total actual renewable water resources per inhabitant	2007	1787	m ³ /yr					
Total dam capacity	2003	0	10 ⁹ m ³					
Total water withdrawal	2003	3.298	10 ⁹ m ³ /yr					
• as % of total actual renewable water resources	2003	22.44	%					
IRRIGATION AND DRAINAGE								
Irrigation potential	2007	240	1000 ha					
Water Management								
Area equipped for irrigation: full control - total	2003	50	1000 ha					
Equipped lowlands	2003	150	1000 ha					
Total area equipped for irrigation	2003	200	1000 ha					
• Area equipped for irrigation as % of cultivated area	2003	14.5	%					
• Annual increase rate		-	%					
• Power irrigated area as % of area equipped for irrigation		-	%					
• Area actually irrigated as % of area equipped for irrigation		-	%					
Non-equipped cultivated lowlands and flood recession	2003	0.0	1000 ha					
Total agricultural water managed area	2003	200	1000 ha					
• Agricultural water managed area: as % of cultivated area	2003	18.7	%					
• Drained cultivated area as % of total cultivated area		-	%					
Typology of irrigation schemes								
Small-scale schemes (<ha)			1000 ha					
Medium-scale schemes (- ha)			1000 ha					
Large-scale schemes (>ha)			1000 ha					
Irrigated crops								
Rice	1984	1.3	1000 ha					
Maize	1984	150.0	1000 ha					
Sugar cane	1984	9.8	1000 ha					
Bananas	1984	3.0	1000 ha					
Other perennial crops	1980	2.8	1000 ha					
ENERGY INDICATORS								
Energy Production			Mtoe					
Net Imports			Mtoe					
TPES			Mtoe					
- TPES/Pop			toe/capita					
- TPES/GDP			toe/thousand 2000 US\$					
- TPES/GDO (PPP)			toe/thousand 2000 US\$ PPP					
Electricity Consumption			TWh					
- EC/Pop			kWh/capita					
ENERGY SUPPLY AND CONSUMPTION								
	Coal	Gas	Crude oil	Petroleum products	Hydro	Other Renewable & Waste	Others	TOTAL
Production								
Imports								
Exports								
International Marine								
Bunkers								
Stock Changes								
Total Primary Energy Supply (TPES)								

* In thousand tonnes of oil equivalent (ktoe) on a net calorific value basis.

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