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Flows Programme (MASIF)**

**Evaluating Cocaine Market Interventions:  
How External Shocks and Disruption of  
Criminal Networks Impact the Cocaine  
Trade and Social Outcomes**

**Final Report**





EUROPEAN COMMISSION

*Submitted to:*

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*“I’m not feeling like a police officer, I’m feeling like a soldier conducting a counter-insurgency campaign.”*

Commander, Special Forces, Military Police of Rio de Janeiro State.<sup>1</sup>

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<sup>1</sup> BR Interviewee 2, December 2024.



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## List of Acronyms

BL	Beltrán-Leyva
CAB	Criminal Asset Bureau
CPF	Carlos Patiño Front
CV	Comando Vermelho
EGC	Ejército Gaitanista de Colombia
ELN	Ejército de Liberación Nacional
EMC	Estado Mayor Central
ERU	Emergency Response Unit
EU	European Union
EUDA	European Union Drugs Agency
FARC	Fuerzas Armadas Revolucionarias de Colombia
FOS	Frente Oliver Sinisterra
Garda	Irish police
GIFP	Global Illicit Flows Programme
GI-TOC	Global Initiative Against Transnational Organized Crime
GUP	Guerrillas Unidas del Pacífico
KPS	Kingpin Strategy
NMNS	Non-medical and non-scientific
OC	Organised crime
OCGs	Organised crime groups
PCC	Primeiro Comando da Capital
PIRA	Provisional Irish Republican Army
PRI	Institutional Revolutionary Party
Sky ECC	Sky elliptic-curve cryptography
SM	Segunda Marquetalia
STF	Brazilian Federal Supreme Court
UNODC	United Nations Office for Drugs and Crime



## Executive Summary

This report looks to evaluate the effects of drug market enforcement, and broader external disruptions, through case studies (Sky ECC in the Netherlands, criminal gangs in Ireland, criminal gangs in Cape Town, the dissolution of FARC guerrillas in Colombia, COVID-19 policing shocks in Rio de Janeiro, and the collapse of the Beltrán-Leyva cartel in Mexico) which shed light on their impacts from two lenses. First, the efficacy of enforcement at undermining and suppressing these markets. Second, the impact of these enforcement efforts and subsequent market disruptions on the societies in which they take place. The findings are stark. In no single case we evaluate have major external shocks or disruptions through enforcement, or lack thereof, been shown to have any demonstrable lasting impact on drug markets either locally or globally. Even in major successful enforcement cases, such as Sky ECC, spikes in seizures typically abate as criminal markets adapt and broader drug markets were largely unaffected. While we observe some potential short-term displacement of trafficking routes and disruption of operations, we expect limited, if any, long-term trend shifts in drug supply or demand.

We find clear evidence in case studies with limited underlying societal resilience and state capacity that enforcement often serves to worsen underlying violence and societal disruption dynamics, imposing significant human costs in terms of lives lost and socio-economic upheaval. Meanwhile, each case study attests to the remarkable resilience among criminal actors and organisations in the face of market disruptions and enforcement. This reiterates a well-articulated policy precept that policing drug markets can, at best, shape and manage these markets. Enforcement often operates from a basis of chasing unhelpful, short-termist metrics and indicators, for example seizures or arrests. Moreover, the pursuit of these goals often comes at the expense of underlying state building and socio-economic development initiatives required to fundamentally alter the conditions which allow criminals and drug markets to become embedded in the first place.

The case studies do point to a clear role for drug market enforcement in preventing criminal impunity and the establishment of corrosive-hegemonic market actors. Moreover, enforcement has a key role in demonstrating the rule of law and state presence, when strategically targeted against high-level criminal actors. However, if the goal of drug law enforcement is to substantially reduce or eradicate entrenched drug markets, we have little evidence it can or does succeed.



## Introduction

The current approach to illicit drug market management is based on the premise that police enforcement can both reduce drug market scale and associated violence. By removing criminal actors, enforcing drug laws, targeting drug supply through seizures and arrests, and disrupting the networks and governance of criminal markets, governments seek to diminish the scale and impact of illegal drug markets, with the eventual goal of drastically reducing illegal drug demand and supply within societies. Within this approach there is a strategic assumption that undertaking enforcement actions against criminal actors within drug markets reinforces the goal of reducing the size of these markets.

This report seeks to evaluate the extent to which this widely held approach to cocaine markets, in particular, and organised crime is effective in its goal of reducing drug market scale and associated violence. In measuring success, this report looks beyond tactical and operational successes – including arrests and seizures, but also other forms of market disruption, including inter/intra-gang feuds, assassinations, market restructuring based on the removal of a monopolistic guerrilla actor and counterfactuals of temporarily reduced enforcement. Rather, success is considered in a strategic sense, measured by its overall disruption on the size, profitability and harms of the cocaine market.

This report serves to inform the programming strategies of EU-funded projects, including the Global Illicit Flows Programme (GIFP). The GIFP was launched as an umbrella project in 2019 by the European Commission’s Directorate General for International Cooperation and Development “to enshrine the benefits of trans-regional law enforcement and judiciary cooperation in countering transnational security threats into its response”.<sup>2</sup> Since the GIFP and its multiple actions focus on disrupting illicit flows and organised crime (OC), there is an ongoing need to assess how these strategies can be better tailored to ensure operational activities enable strategic outcomes. This report seeks to address these questions by analysing the impact of enforcement activities on drug markets within the framework of current EU strategies, such as through initiatives like the GIFP.

To empirically evaluate the extent to which the current approach to drug market management is effective in reducing market scale and related violence, this report undertakes a multi-case study analysis of drug market interventions and external shocks. The cases are evaluated using mixed methods, including interviews. We also undertook extensive data analysis and a non-systematic literature review of academic and grey literature. Data was drawn from a myriad of sources including the European Union Drugs Agency (EUDA), the United Nations Office for Drugs and Crime (UNODC), the European Commission and select national databases.<sup>3</sup> Interviews were conducted with practitioners, law enforcement, government officials and other key experts with direct knowledge of the cocaine markets or specific interventions studied in this report.

A total of six case studies were chosen for study: Sky ECC in Belgium and the Netherlands, interventions against criminal drug gangs across Ireland, criminal drug gang interventions in Cape Town, South Africa, the dissolution of FARC guerrillas in Colombia, COVID-19 era policing shocks in Rio de Janeiro, Brazil and the collapse of the Beltrán Leyva Cartel in Mexico.

Case study selection was predicated on cases with distinct and varied geographies, economic contexts, levels of state capacity, export or import status, and drug market scale. Moreover, there is an overwhelming, but not sole, focus on cocaine markets. Between the diverse cases, the shared factor

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<sup>2</sup> European Union, ‘What Is the Global Illicit Flows Programme?’, Global Illicit Flows Programme, accessed 29 January 2025, <https://illicitflows.eu/programme/>.

<sup>3</sup> In some cases, values are standardized (normalized) such that 1 equals the maximum homicide rate for a given country in a given period and 0 equals the minimum homicide rate for a given country in a given period. Using this standardization methods eases the graphical analysis because it compares countries that have different levels of violence over time. Formally, **Standardized homicide rate** =  $(\text{hom\_rate}_i - \min(\text{hom\_rate}_i)) / (\max(\text{hom\_rate}_i) - \min(\text{hom\_rate}_i))$





is the presence of external shocks in the form of government intervention attempting to reduce the scale of domestic, transit, or export markets. As such, the findings of this paper benefit from a comparative inferential logic: cases feature few similarities beyond a common experience with drug market interventions, and yet share common outcomes, lending evidence of the (non)materiality of such interventions. Furthermore, the deliberate heterogeneity of cases within the sample allows for stronger inference from the wider population of drug market interventions globally, rather than simply from specific contexts. Similarly, the heterogeneity across specific enforcement-driven strategies to manage drug markets – ranging from tech-enabled targeted prosecutions to those as part of political peace processes – allows for better generalisability across the spectrum of government enforcement responses.

Our findings confirm many of the critiques of existing approaches to drug market management. Namely, that enforcement can deliver successes in terms of removing certain corrosive criminal actors and ensuring overt state control over a particular territory, but that interventions have almost no effect on drug market supply or trends. In many cases, it may simply fuel or cause violence within the market. The implications of this study are far reaching, deriving from the following key findings:

1. Drug law enforcement can alter criminal dynamics within markets but has no discernible impacts on trends in supply and demand in well-established, mature, markets.
2. Removal of high-level criminal actors, while important, appears to have limited impact on the market overall or supply trends, beyond displacement of commodity flow routes. Markets and criminal organisational structures show tremendous resilience in response to these external shocks.
3. A key function of drug market enforcement is to remove criminal actors before they can develop criminal hegemony to the point where they can overtly or covertly challenge the rule of law or state institutions (see “corrosive hegemony” discussion below).
4. There is no clear empirical justification for the strategic assumption that enforcement against criminal actors impedes drug market supply or demand.
5. Operational and strategic goals need to take account of differing governance capabilities given the complex impacts of enforcement strategies in areas of weak governance or state presence.



## Literature Review

This report eschews broad discussions on the relative merits of current drug policies or other regulatory alternatives. It is instead focused on evaluating the outcomes of drug market interventions and shocks. Nevertheless, an extremely advanced academic literature exists which allows an important grounding for analysis of drug market enforcement strategies and their tactical implementation. For the purposes of this literature review this report focuses on four themes: 1) regulating global drug markets 2) the marginal impacts of enforcement; 3) the aggregate impacts of enforcement; 4) strategic vs. tactical approaches to drug market enforcement.

### *Regulating Global Drug Markets*

Drug control operates via a binding set of international treaties which form the basis for the international drug control system. This system seeks to limit the supply of drugs globally through a mixture of internationally binding regulations, underpinned by prohibitions on certain forms of supply and consumption.<sup>4</sup> It is generally dated to the Shanghai Opium Commission meeting of 1909 and the first formal multilateral treaty, the Hague Opium Convention of 1912, coming under the aegis of the League of Nations in the 1920s and the United Nations in the 1940s.<sup>5</sup> The global aim was to regulate a generally accepted form of legitimate consumption - medical and scientific use - and suppress and eventually end all non-medical and non-scientific (NMNS) use. From 1912 through 1988, 12 separate international treaties and protocols were agreed (although some achieved limited adherence and ratification, most have achieved near universal adherence) with the aim of regulating global medical and scientific supply and suppressing NMNS use.<sup>6</sup>

### *Evaluating Marginal Impacts of Enforcement*

Evaluating the societal effectiveness of enforcing prohibitions on drugs depends on whether one is examining the marginal effects of enforcement or the aggregate effects of prohibition. It also depends on the relative maturity of drug markets. Enforcement against emerging drug markets may severely curtail, or at least delay their development, with a potentially significant societal gain in terms of limitation, or delayed onset, of health and social costs that derive from drug use.<sup>7</sup>

In mature drug markets, namely the markets law enforcement is generally most concerned about, enforcement of prohibition is broadly ineffective at the margins. Additional implementation of or investment in enforcement does little (if anything) to further shrink the market or raise prices. The case studies in this report confirm this. In 2014 leading scholars Reuter and Pollack conducted a meta-analysis of drug enforcement's impact on prices. The finding was that additional drug enforcement has no demonstrable impact on prices and thereby is marginally ineffective.<sup>8</sup> An additional 1 euro invested in drug enforcement, beyond a certain initial point, produces no return in terms of reducing the scale of supply or demand in the market. Despite this, in most cases around the world, additional investment in prohibition and enforcement is usually the default response to drug markets, particularly when there is increased visibility, violence or public nuisance associated with these markets.

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<sup>4</sup> John Collins, *Legalising the Drug Wars: A Regulatory History of UN Drug Control* (Cambridge: Cambridge University Press, 2021), <https://www.cambridge.org/core/books/legalising-the-drug-wars/2FDCC2BD70C3AF8E209C0B0ED20269A8>.

<sup>5</sup> William B. McAllister, *Drug Diplomacy in the Twentieth Century: An International History* (New York: Routledge, 2000).

<sup>6</sup> Collins, *Legalising the Drug Wars*.

<sup>7</sup> Interview with Jonathan Caulkins, December 2024; Gernot Tragler, Jonathan P. Caulkins, and Gustav Feichtinger, 'Optimal Dynamic Allocation of Treatment and Enforcement in Illicit Drug Control', *Operations Research* 49, no. 3 (2001): 352–62.

<sup>8</sup> Harold Pollack and Peter Reuter, 'Does Tougher Enforcement Make Drugs More Expensive?', *Addiction* 109, no. 12 (2014): 1959–66.





Marginal enforcement does, however, have a role in preventing “corrosive hegemony”<sup>9</sup> – a phenomenon whereby criminal actors become so powerful they can corrupt the legal and political processes as well as exert unchecked and ruthless control on communities within their territorial domains (see conclusion). Enforcement in this context serves to establish and maintain credibility for state deterrence (see Rio de Janeiro case study), demonstrate credible legal risks for criminals (see Irish criminal gangs case study), and ensure the non-commercialisation of illegal activities. Even under a legal regime for drug supply many of these goals would remain the same.<sup>10</sup>

More generally, marginal enforcement serves as a supply chain disruptor. This can produce positive or negative outcomes, depending on the societal goal in question and the existing context. For example, disrupting the operation of a particularly violent criminal gang can place downward pressure on violence within the market. Conversely, removing hegemonic criminal leaders also often serves to remove existing dispute resolution mechanisms or disrupt the power balance between criminal actors, sparking anarchic violence and power struggles (see Beltran-Leyva case study). Enforcement can also drive innovation, for example if interdiction efforts against one opioid drug incentivises a supply shift towards even more dangerous forms of synthetic opioids.<sup>11</sup>

A key problem with establishing a more rational form of marginal enforcement under prohibition is the ongoing role of metrics and indicators (see below) in driving enforcement strategies and thereby objectives.<sup>12</sup> As Kriegler writes,

*“Common measures of ‘successful’ interventions against organized crime include fewer criminal groups in operation and/or reduced membership of such groups. However, these indicators are not the desired end product but merely strategic steps on the way to the goal, which is likely to be a reduction in the levels of violence, illness, corruption and misery associated with organized crime. This is difficult to evaluate.”<sup>13</sup>*

At a strategic level, although marginal enforcement does disrupt, and sometimes shape (positively or negatively), the political economy of markets and their operational status quo, it has no real prospect of significantly diminishing or eradicating drug markets.<sup>14</sup>

### **Evaluating Aggregate Impacts of Enforcement**

What, therefore, is the “last argument” for prohibition, given its unpredictability, high (but generally socially and geographically concentrated) social costs, and lack of marginal efficacy? Effectively the argument is one of aggregate price and demand. Prohibition makes drugs much more expensive and less easily obtainable than they would be under free-market legalisation.<sup>15</sup> There are significantly

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<sup>9</sup> This term was coined by the lead author for this report and is, to the best of our knowledge, the first such usage of it in the context of criminal governance.

<sup>10</sup> Mark A. R. Kleiman and Jeremy Ziskind, ‘Lawful Access to Cannabis: Gains, Losses and Design Criteria’, *Journal of Illicit Economies and Development* 1, no. 3 (29 November 2019): 272–78, <https://doi.org/10.31389/jied.41>.

<sup>11</sup> See: Thomas Babor et al., *Drug Policy and the Public Good* (Oxford University Press, 2018), <https://doi.org/10.1093/oso/9780198818014.001.0001>.

<sup>12</sup> Nicola Singleton et al., ‘Drug Supply Indicators: Pitfalls and Possibilities for Improvements to Assist Comparative Analysis’, *International Journal of Drug Policy* 56 (2018): 131–36, <https://doi.org/10.1016/j.drugpo.2018.02.003>.

<sup>13</sup> Anine Kriegler, ‘Cannabis Policy Reform and Organized Crime: A Model and Review for South Africa’, *Drug Policy Reform and Organized Crime Series* (Geneva: The Global Initiative Against Transnational Organized Crime, February 2023), <https://globalinitiative.net/wp-content/uploads/2024/02/Anine-Kriegler-Cannabis-policy-reform-and-organized-crime-A-model-and-review-for-South-Africa-GI-TOC-February-2023.pdf>.

<sup>14</sup> Jonathan P. Caulkins, ‘Effects of Prohibition, Enforcement and Interdiction on Drug Use’, in *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*, ed. John Collins (London: LSE IDEAS, 2014), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.

<sup>15</sup> Ibid.



fewer consumers, and those that do consume do so at lower levels due to inflated prices.<sup>16</sup> Hospital admissions, treatment costs and other social harms are thereby presumably reduced at the societal level.<sup>17</sup> However, these costs are increased drastically at the individual consumer and supplier levels given the danger, criminalisation, violence, trust and purity issues that pervade the criminal market.

Moreover, there are no benefits accruing to producer and transit countries as well as more localised trafficking and retail markets that are captured by criminal actors (see Rio case study). They are purely cost takers in the implementation of prohibition.<sup>18</sup> They suffer the consequences of empowered and enriched criminals who can buy police and political impunity, as well as arsenals of weapons and foot soldiers to challenge the writ of the state and build territorial control. The only potential beneficiaries under this argument are consumer countries.<sup>19</sup> However, even that dichotomy is starting to break down for two reasons. Firstly, producer and transit countries are becoming also increasingly consumer countries (see Mexican methamphetamine treatment admissions, Figure 25). Secondly, the rise of synthetic drug production is causing a radical shift in global commodity chains, the implications of which remains far from clear.<sup>20</sup>

### ***Strategic vs. Tactical Approaches to Drug Market Enforcement***

Despite the socio-economic realities underpinning drug markets, the overt strategic posture of governments remains misaligned with de facto implementation. States within Europe, for example, pursue an ostensible strategy of maximalist prohibition, while day-to-day implementing a more limited tactical prohibition. Drug laws are subject to significant, ongoing critical analysis suggesting that they are used as a means of social control of certain, generally marginalised, groups and activities.<sup>21</sup> They also enable police to exert a public order approach to drug markets, including targeting those who operate with open levels of violence or who attempt to penetrate and corrupt formal state structures.<sup>22</sup> Part of this outcome stems from rationalisation of police resources. There is no capability to enforce drug prohibition in all contexts, so its implementation becomes a form of display and market shaping.<sup>23</sup> Further, European governments are generally unwilling to engage in the kind of draconian tactics which a maximalist implementation of prohibition would bring. Realistically, European states have never pursued a purist “war on drugs”, which would require mass surveillance, incarceration, social upheaval, and human rights abuses. Nor would they have the societal appetite to do so.

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<sup>16</sup> Ibid.

<sup>17</sup> Ibid.

<sup>18</sup> Ibid.

<sup>19</sup> Daniel Mejia and Pascual Restrepo, ‘Why Is Strict Prohibition Collapsing? A Perspective from Producer and Transit Countries’, in *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*, ed. John Collins (LSE, 2014), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.

<sup>20</sup> Vanda Felbab-Brown and Jonathan Caulkins, ‘The Radical Challenge Synthetic Opioids Pose for Drug Policy’, Brookings Commentary Podcast, accessed 16 January 2025, <https://www.brookings.edu/articles/the-radical-challenge-synthetic-opioids-pose-for-drug-policy/>.

<sup>21</sup> Michael Shiner, ‘British Drug Policy and the Modern State: Reconsidering the Criminalisation Thesis’, *Journal of Social Policy* 42, no. 3 (July 2013): 623–43, <https://doi.org/10.1017/S0047279413000226>.

<sup>22</sup> Interview with Jonathan Caulkins, December 2024.

<sup>23</sup> Interview with Bryce Pardo, December 2024; Caulkins, ‘Effects of Prohibition, Enforcement and Interdiction on Drug Use’.





# The EU Cocaine Market

Figure 1 highlights the general population survey trends of drug use in Europe. Despite decades of market suppression activities and numerous law enforcement successes, drug use has been on a general upward trend.<sup>24</sup> Meanwhile, the price of cocaine has been on general downward trend across the EU. Figure 2 shows increasing affordability of a gram of cocaine in 16 EU Member States between 2015 and 2020.<sup>25</sup> This echoes the trends this report highlights within case study countries during periods of significant enforcement improvements and successes.

A common feature of illicit drug market policing is that it is not evaluated on market management outcomes – trend changes in price per gram, overall number of consumers, individual and social harm per unit consumed,<sup>26</sup> harms and impact on producer and transit countries, and so forth.<sup>27</sup> Instead, policing invariably becomes focused on process metrics and indicators – how many kilos were seized, how many people were arrested etc. As one authoritative paper has highlighted,

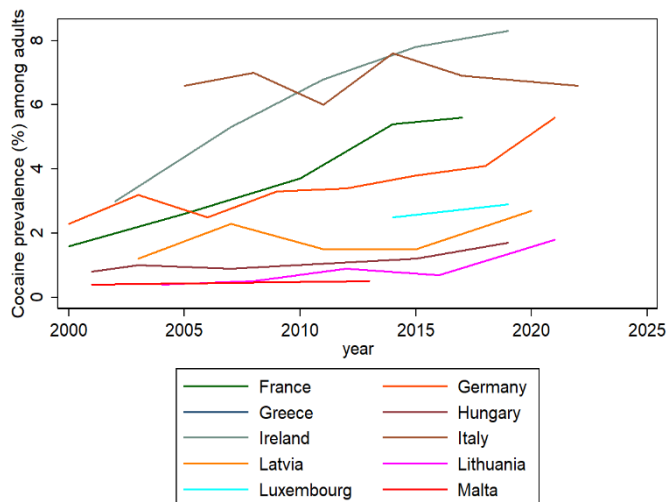


Figure 1: Lifetime cocaine prevalence among all adults (15-64) according to population surveys.

Changes in average affordability of cocaine in a group of 16 EU Member States, 2015-2020

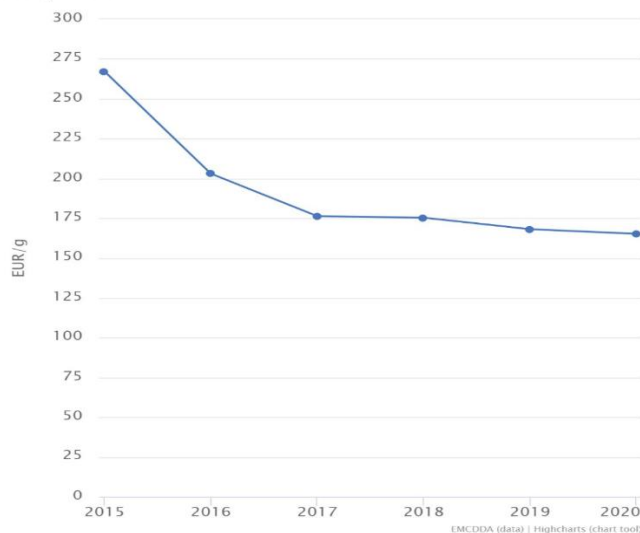


Figure 2: Changes in average affordability of cocaine in a group of 16 EU Member States, 2015-2020.

Examples of limitations of these data sources include: the extent to which they reflect operational priorities rather than market changes; question marks over the robustness of and consistency in data collection methods, and issues around the timeliness of data availability. Such problems are compounded by cultural, social and contextual differences between countries.<sup>28</sup>

Overall, significant caution is required when utilising available data on drugs. This data is used, not because it is optimal or instructive, but because it is available. Criminals don't keep official records and,

<sup>24</sup> Permanent link to this table: [https://www.euda.europa.eu/data/stats2024/gps\\_en#displayTable:GPS-222](https://www.euda.europa.eu/data/stats2024/gps_en#displayTable:GPS-222)

<sup>25</sup> Graph extracted from: European Monitoring Centre for Drugs and Drug Addiction, *EU Drug Market, Cocaine* (LU: Publications Office, 2022), <https://data.europa.eu/doi/10.2810/944155>.

<sup>26</sup> Harm Reduction is a well-established demand-side framework based on agnosticism and de-stigmatization of drug use and a focus on reducing the harm to the consumer. See: 'What Is Harm Reduction?', Harm Reduction International, accessed 10 December 2018, <https://www.hri.global/what-is-harm-reduction>.

<sup>27</sup> John Collins, ed., *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy* (LSE IDEAS, 2014), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.

<sup>28</sup> Singleton et al., 'Drug Supply Indicators'.







by definition, illicit commodity flows aren't captured by any formal state or transnational reporting process. Instead, we rely on proxy indicators of market shifts and trends. But drawing inferences from many of these is notoriously complicated.<sup>29</sup> For example, an increase in seizures at one port may indicate changing trade routes or increased global supply. Or it may simply mean that police intelligence has become more effective (thus prompting criminal adaptation); operational energies are being directed to that port; inter or intra criminal group rivalries are causing a strategic leak of information on drug flows; criminals are seeking to deflect attention from other flows, and so on. Governments, nevertheless, have an incentive to seek public relations credit for these "successes" even if they are only chimerical, transitory, or irrelevant to market dynamics and outcomes.

Overall, seizures data tends to reflect the effort made to stop drugs flowing much more than the actual amount of drugs flowing. Furthermore, most countries do not adequately report drug seizures to UNODC<sup>30</sup> – some only report specific substances, large seizures or seizures made by specific Law Enforcement agencies<sup>31</sup> – meaning that conclusions cannot be drawn for different countries using data from the UNODC seizures database. For example, Mexico reported 35 seizures in 2014, none in 2015 and 2016, and 13,389 in 2017. Brazil reported 9 seizures in 2012 and 10 seizures in 2018. Colombia jumped from 30,000 seizures in 2013 to 212,260 in 2014 and Colombian seizures make up about 2/3 of the overall individual seizures reported to UNODC.<sup>32</sup> Meanwhile, data on street price and purity tends to be more reliable because they usually derive from police officers or researchers buying drugs undercover and conducting tests on them. Unfortunately, this type of more comparable data is only available with any consistency for the US and Europe.<sup>33</sup>

As a general trend over the past five decades, murders, drug seizures, and arrests have all increased while drugs became cheaper, more accessible, and purer. The process metrics and indicators for drug market policing have improved, while drug market supply outcomes have worsened. Between 2012 and 2019 the typical cocaine purchased by analysts rose from 63% to 76% purity,<sup>34</sup> without getting significantly more expensive (see Figure 3 for price data).<sup>35</sup> In France, a typical tested sample in 2012 had 32% purity compared to 66% in 2019.<sup>36</sup> Moreover, the market is becoming more complex. New substances are emerging.<sup>37</sup> Consumer patterns are constantly changing and policing of markets almost inevitably lags market innovations, being reactive rather than shaping these market changes in most cases.

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<sup>29</sup> Ibid.

<sup>30</sup> 'Individual Drug Seizures (IDS)', United Nations Office on Drugs and Crime, accessed 21 January 2025, [https://www.unodc.org/unodc/en/data-and-analysis/statistics/drugs/seizures\\_cases.html](https://www.unodc.org/unodc/en/data-and-analysis/statistics/drugs/seizures_cases.html).

<sup>31</sup> UNODC guidelines suggests having a reporting agency and listing the law enforcement agency that made each individual seizure: 'Individual Drug Seizures - Guidelines' (United Nations Office on Drugs and Crime), accessed 21 January 2025, [https://www.unodc.org/unodc/en/data-and-analysis/statistics/drugs/seizures\\_cases.html](https://www.unodc.org/unodc/en/data-and-analysis/statistics/drugs/seizures_cases.html). In federalist countries – such as Mexico and Brazil – with multiple police agencies only a small minority of drug seizures are present in the UNODC Individual Seizures data. Bruno Pantaleão, 'Enxugando Gelo: Apresentando Os Microdados Das Apreensões de Drogas No Sul Do Brasil', *Revista Brasileira de Segurança Pública*, 2025.

<sup>32</sup> Own analysis of data from UNODC Drugs Monitoring Platform, accessed 18 December 2024, <https://dmp.unodc.org/>

<sup>33</sup> U.S. Department of Justice, 'Narcotic Buy Operations', accessed 18 December 2024, <https://www.ojp.gov/ncjrs/virtual-library/abstracts/narcotic-buy-operations>.

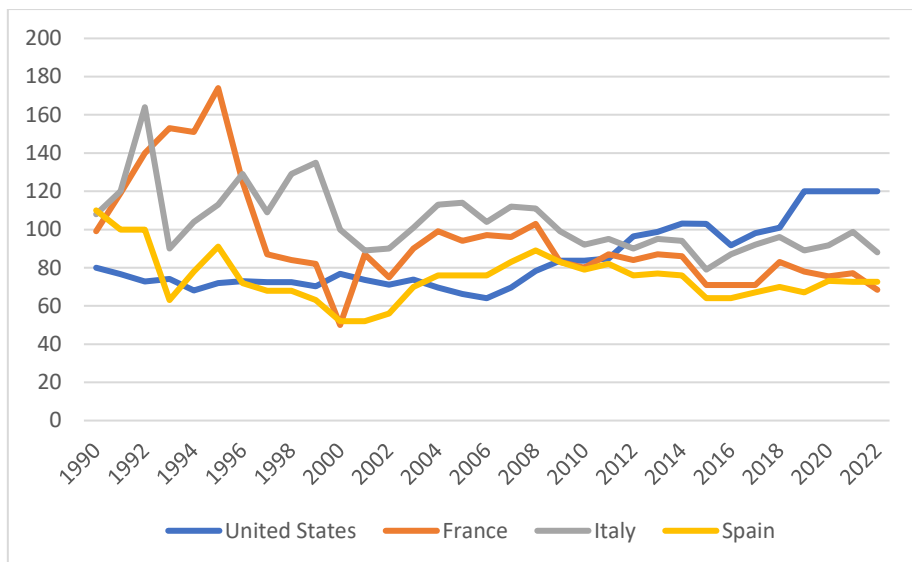
<sup>34</sup> Own analysis of data from UNODC Drug Purity Platform, accessed 18 December 2024, <https://dataunodc.un.org/dp-drug-purity>

<sup>35</sup> Data obtained from UNODC: <https://dataunodc.un.org/dp-drug-prices-Europe-USA>.

<sup>36</sup> Own analysis of data from UNODC Drug Purity Platform, accessed 18 December 2024, <https://dataunodc.un.org/dp-drug-purity>

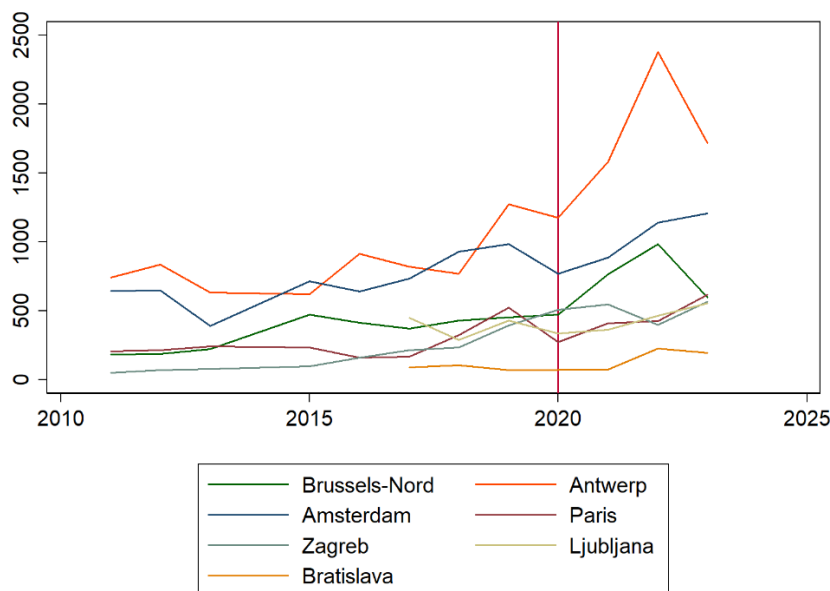
<sup>37</sup> John Collins, 'Regulation as Global Drug Governance – How New Is the NPS Phenomenon?', in *Psychoactive Substances - Policy, Economics and Drug Regulation*, ed. Andres Roman-Urrestarazu and Ornella Corazza (Cham, Switzerland: Springer, 2017).





**Figure 3:** Evolution of retail prices for 1 gram of cocaine.  
 Note: Europe values are in Euros while US values are in USD.

Perhaps the most reliable method of measuring the evolution of drug usage including purity (a relatively good proxy for drug supply) is wastewater analysis. Adopted all over the world, this method samples sewage in treatment stations and generates an index of cocaine (or heroin) present in the sewage, a non-biased proxy for use prevalence amongst the population of the area. Unlike seizures, this measurement captures the amount of cocaine being consumed in a given location and not the amount of cocaine flowing through a port, city, or place where police vigilance is highest. This thereby increases its usefulness to inform policy decisions.<sup>38</sup>



**Figure 4:** Cocaine detected in Europe's sewage (Source: EUDA).  
 Note: 2020 indicates "EncroChat" operation.

<sup>38</sup> For example see: 'Wastewater Analysis and Drugs — a European Multi-City Study' (European Union Drugs Agency (EUDA)), accessed 18 December 2024, [https://www.euda.europa.eu/publications/html/pods/waste-water-analysis\\_en](https://www.euda.europa.eu/publications/html/pods/waste-water-analysis_en).



# Sky ECC: Impacts on the Netherlands and Belgium

## Background

Sky ECC (Sky elliptic-curve cryptography) was a subscription-based encrypted messaging application that ran on modified phones provided by Sky Global, a company headquartered in Canada and the US.<sup>39</sup> Known for its high-level data protection, the platform was popular with those seeking to avoid the interception of their communications by law enforcement and by 2021 was believed to be the world's largest cryptophone network<sup>40</sup> with approximately 170,000 users worldwide, of which over 20% were located in Belgium and the Netherlands.<sup>41</sup> Its popularity was further fuelled by the decryption of EncroChat, a similar encrypted messaging system, by European law enforcement agencies in 2020 which caused numerous users to switch to Sky ECC's supposedly more secure network.

Suspicions that Sky ECC was being used by organised crime groups (OCGs) to facilitate the trafficking of narcotics into and within Europe led to 'Operation Argus' – a joint investigation by French, Belgian and Dutch police which resulted in the chat service's decryption in mid-February 2021. Over the course of several weeks, Belgian, French, and Dutch police intercepted over one billion messages from 70,000 phones.<sup>42</sup> These provided the intelligence for hundreds of raids on 9 March 2021, whereby police officers arrested approximately 80 people across Belgium and the Netherlands and seized 17 tonnes of cocaine in Belgium and €1.2 million in cash in a single day.<sup>43</sup>

Since then, until the date of publication, investigators and public prosecutors continued to extract intelligence from the hundreds of millions of stored messages. A year after the initial decryption, the Belgian authorities had identified 888 suspects and seized €4.5 billion worth of drugs.<sup>44</sup> By March 2024, thousands more suspects had been identified, with 1,093 successful convictions in Belgium. In addition, the Belgian government had signed treaties to extradite implicated drug barons from Gulf states, interdicted shipments of drugs worth billions of euros, and continued to launch new investigations.<sup>45</sup> As recently as October 2024, 129 defendants from five countries were convicted in the largest drug trial in Belgian history.<sup>46</sup> According to Belgian legal experts working on the Sky ECC case, new investigations are still unfolding in December 2024 and are likely to continue to do so as investigators turn to new areas, using artificial intelligence to analyse messages for information on illicit financial flows and develop algorithms to translate and filter messages in localised dialects which have previously posed translation issues for prosecutors.<sup>47</sup>

<sup>39</sup> Jan-Jaap Oerlemans and Sofie Royer, 'The Future of Data-Driven Investigations in Light of the Sky ECC Operation', *New Journal of European Criminal Law* 14, no. 4 (1 December 2023): 434–58, <https://doi.org/10.1177/20322844231212661>.

<sup>40</sup> Bill Goodwin, 'Police Crack World's Largest Cryptophone Network as Criminals Swap EncroChat for Sky ECC', *Computer Weekly*, 10 March 2021, <https://www.computerweekly.com/news/252497565/Police-crack-worlds-largest-cryptophone-network-as-criminals-swap-EncroChat-for-Sky-NCC>.

<sup>41</sup> 'New Major Interventions to Block Encrypted Communications of Criminal Networks', Europol, 12 March 2021, <https://www.europol.europa.eu/media-press/newsroom/news/new-major-interventions-to-block-encrypted-communications-of-criminal-networks>.

<sup>42</sup> Oerlemans and Royer, 'The Future of Data-Driven Investigations in Light of the Sky ECC Operation'.

<sup>43</sup> Oerlemans and Royer; Helen Lyons, 'When Sky ECC Fell, so Too Did Belgian Crime Lords', *The Brussels Times*, 10 March 2021, <https://www.brusselstimes.com/belgium/159176/cracking-of-sky-ecc-encrypted-messaging-service-brings-down-organised-crime-lords>.

<sup>44</sup> Newsroom, 'Operation Sky ECC: 888 Suspects and €4.5 Billion Worth of Drugs Seized', *The Brussels Times*, 10 March 2022, <https://www.brusselstimes.com/210112/operation-sky-ecc-888-suspects-and-e4-5-billion-worth-of-drugs-seized>.

<sup>45</sup> Lauren Walker, 'Belgium's Biggest Bust: State of Play Three Years on from Sky ECC Crack', *The Brussels Times*, accessed 21 January 2025, <https://www.brusselstimes.com/958227/belgiums-biggest-bust-state-of-play-three-years-on-from-sky-ecc-crack>.

<sup>46</sup> Lauren Walker, 'Sky ECC: Over 100 Convicted in Belgium's Biggest Drug Trial after Historic Bust', *The Brussels Times*, 29 October 2024, <https://www.brusselstimes.com/1290628/sky-ecc-over-100-convicted-in-belgiums-biggest-drug-trial-after-historic-bust>; 'Belgium's Biggest Criminal Trial with 129 Defendants Starts', *Flanders News*, 18 December 2023, <https://www.vrt.be/vrtnws/en/2023/12/18/criminal-trial-drugs-belgium-brussels-gangs-sky-ecc/>.

<sup>47</sup> Interview with member of Belgian Prosecutor's Office, December 2024.





The recent and ongoing nature of this case study hinders attempts to gauge the long-term impacts of this law enforcement operation. However, developments over the past few years do allow for an evaluation of the short and medium-term impacts of the Sky ECC decryption on the availability of cocaine, smuggling routes and methods as well as violent crime rates.

## Supply

Supply data indicates that whilst the flow of cocaine into and through Belgium and the Netherlands may be plateauing or even decreasing, this trend is not replicated across the rest of Europe. After seven consecutive years of record quantities of cocaine seizures by Belgian customs, predominantly at the port of Antwerp (Europe's main port of entry for cocaine) the trend reversed in 2024 for the first time in almost a decade.<sup>48</sup> 44 tonnes of cocaine were seized in 2024,<sup>49</sup> a decrease of over 60% from the 121 tonnes interdicted the previous year.<sup>50</sup> The Netherlands, as host to Europe's busiest port (Rotterdam), has been the second largest entry point for cocaine in recent years and has experienced similar patterns to neighbouring Belgium.<sup>51</sup> After several years of increasing volumes of seizures at Dutch ports, peaking at 72 tonnes in 2021, the inflow of cocaine has since slowed with 2024 estimated to be the lowest year since 2017 (see Figure 6).<sup>52</sup> Both countries are therefore experiencing significant reductions in cocaine seizures, with 2024 figures dramatically diverging from the pattern of the past 5-10 years.

Given their gateway into Europe (together accounted for 50.3% of EU seizures in 2022<sup>53</sup>), a reduction in cocaine seizures at these ports could suggest a continent-wide supply reduction. On the contrary, however, price and purity data in Europe indicates increased availability. Cocaine prices have been steadily falling over the past decade, from over €40,000 to around €30,000 per kilo as of March 2024.<sup>54</sup> According to multiple sources within Belgian law enforcement, this trend has continued over the past couple of years within the Belgian market, where the price per kilo has fallen from €25,000 - €35,000 in 2021 to €24,000 - €26,000 in 2024,<sup>55</sup> with some sources reporting a drop in prices to as low as €20,000.<sup>56</sup> While per kilo prices for traffickers have fluctuated, street prices have remained constant since the mid-1980s according to Belgian law enforcement.<sup>57</sup> Adjusted for inflation this stability equates to a cheapening of cocaine in real terms, permitting what was once a "rich man's drug" to become more accessible with a wider consumer base.<sup>58</sup>

Purity, meanwhile, has, conversely, increased. According to EUDA data, cocaine purity in 2022 was 45% higher than the index year of 2012.<sup>59</sup> Results from the EU's 18 drug checking services reveal that this increase in purity is occurring at a rapid rate; in the first half of 2022, 50% of cocaine samples

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<sup>48</sup> 'Cocaine – the Current Situation in Europe (European Drug Report 2024)' (European Union Drugs Agency (EUDA), 2024), [https://www.euda.europa.eu/publications/european-drug-report/2024/cocaine\\_en](https://www.euda.europa.eu/publications/european-drug-report/2024/cocaine_en).

<sup>49</sup> 'Moins de cocaïne saisie dans le port d'Anvers, davantage à la source en Amérique latine', SPF Finances, 9 January 2025, <https://finances.belgium.be/fr/Actualites/moins-de-coca%C3%AFne-saisie-dans-le-port-danvers-davantage-%C3%A0-la-source-en-am%C3%A9rique-latine>.

<sup>50</sup> 'Cocaine Seizures Fall in Big EU Ports as Gangs Target Easier Routes', POLITICO, 16 July 2024, <https://www.politico.eu/article/5101314/>.

<sup>51</sup> 'Statistical Bulletin 2024 — Seizures of Drugs' (European Union Drugs Agency (EUDA)), accessed 21 January 2025, [https://www.euda.europa.eu/data/stats2024/szr\\_en](https://www.euda.europa.eu/data/stats2024/szr_en).

<sup>52</sup> 'Cocaine Seizures Fall in Big EU Ports as Gangs Target Easier Routes'.

<sup>53</sup> 'Cocaine – the Current Situation in Europe (European Drug Report 2024)'.

<sup>54</sup> Patricia Ortega Dolz, 'Drug Trafficking, More Powerful than Ever, Floods Europe with Cocaine', EL PAÍS English, 11 March 2024, <https://english.elpais.com/international/2024-03-10/drug-trafficking-more-powerful-than-ever-floods-europe-with-cocaine.html>.

<sup>55</sup> Interview with member of Belgium Federal Police, December 2024.

<sup>56</sup> Interview with member of Belgian Prosecutor's Office, December 2024.

<sup>57</sup> Interview with member of Belgium Federal Police, December 2024.

<sup>58</sup> Ibid.

<sup>59</sup> 'Cocaine – the Current Situation in Europe (European Drug Report 2024)'.



tested exhibited a purity ranging from 80% to 100%. By the first half of 2023, this equivalent share had risen to 55%.<sup>60</sup> These EUDA statistics are represented in Figure 5 below.

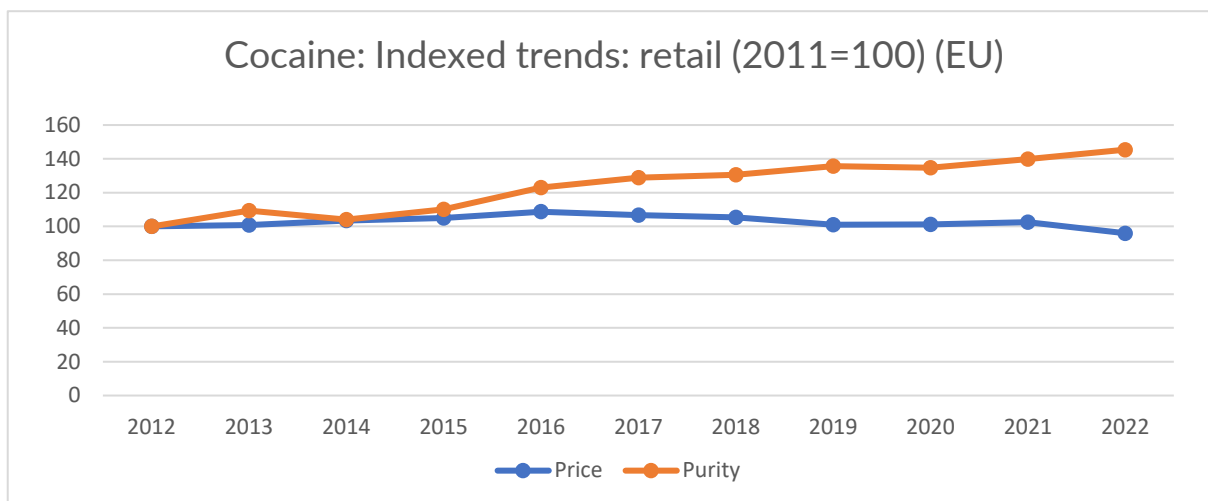


Figure 5: Evolution of cocaine price and purity in Europe based on 2012 base levels.

The combination of rising purity and falling prices is not due to decreased demand. Analysis of municipal wastewater to test for cocaine residues has been used since 2011 to monitor drug consumption levels in Europe. Results from 2023 show an increase in consumption in 49 of the 72 cities included in the study, with only 10 cities reporting decreases.<sup>61</sup> However, even these 10 cities have experienced an overall increase in cocaine consumption since 2011. As such, consumption across Europe has been on the rise for over a decade and is likely connected to the fall in real prices and resultant mainstreaming of the drug.<sup>62</sup> The key exception to this in the past year is the Low Countries. Of the five Belgian and Dutch cities included in the study with data from previous years, only one recorded an increase (Utrecht), two were described as ‘stable’ (Amsterdam and Eindhoven) while Brussels and Antwerp registered the largest and third largest decreases of cocaine consumption in Europe.<sup>63</sup>

If there is a reduction in cocaine supply and consumption in Belgium and the Netherlands, it is only relative. Both countries still record some of the highest seizure rates in Europe and comprise six of Europe’s eight cities with the highest wastewater cocaine residue rates.<sup>64</sup> However, given the broader context of increasing seizures and consumption rates across the rest of the continent, these reductions are striking, particularly when combined with observed decreases in the price of cocaine and increases in its purity. It therefore appears that although the flow of cocaine into Belgium and the Netherlands may have fallen over the past year, the influx of cocaine into Europe more broadly continues to increase unchecked.

### Trade Routes and Methods

The divergent patterns in seizures and consumption rates between the countries implicated in the Sky ECC case and other European countries suggests that attempts at network disruption combined with

<sup>60</sup> Ibid.  
<sup>61</sup> ‘Wastewater Analysis and Drugs — a European Multi-City Study’.  
<sup>62</sup> Ibid.  
<sup>63</sup> Ibid.  
<sup>64</sup> Ibid.



other enforcement efforts, such as bolstering port security,<sup>65</sup> may have partially succeeded in serving as a deterrent to drug trafficking groups. However, if this is indeed the case, the deterrence effect is limited and localised as increasing seizures and cocaine consumption across the rest of Europe imply that OCGs are modifying rather than halting their cocaine trafficking operations into Europe.

One potential explanation for decreasing seizures in Belgium and the Netherlands despite strengthened responses by customs and police forces is the use of novel, elaborate smuggling methods employed by OCGs to evade the detection of cocaine. The growing detection of cocaine processing laboratories in Europe (39 sites in 2022, up from 34 in 2021<sup>66</sup>) suggests OCGs may be innovating to avoid detection.<sup>67</sup> EUDA notes sophisticated processes such as the impregnation of cocaine into materials, plastics, polymers and metal complexes being employed whilst cocaine precursors, namely coca paste and cocaine base, are now being trafficked into Europe<sup>68</sup>. Therefore, these laboratories serve a dual purpose, they can further process coca paste and base, as well as extract liquid cocaine from impregnated materials. Belgian law enforcement points to the ever-evolving OCG modus operandi, with police constantly playing catch-up.<sup>69</sup> Recent examples include the concealment of cocaine in shipments of coal, plastic bananas, or mixing cocaine with porcelain and fruit juice to bypass scanners and sniffer dogs<sup>70</sup>. Although not yet occurring at a large scale, EUDA admits that these novelties signify a “worrying development” and “intelligence gap” that urgently require better understanding.<sup>71</sup>

Whilst evolving smuggling techniques could serve as one explanation for decreasing seizures at Dutch and Belgian ports, changes to typical trafficking routes away from major ports in favour of smaller, less resourced ports is another explanation which could explain the increase in seizures and consumption rates in Europe more generally. This ‘balloon effect’ is a well-known phenomenon since OCGs are often flexible enough to move operations away from areas with more active law enforcement and higher capacity customs services.<sup>72</sup> Ports elsewhere in Europe witnessed significant increases, with Spain,<sup>73</sup> Sweden<sup>74</sup> and the UK<sup>75</sup> reporting record seizures in 2024, while Europe’s

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<sup>65</sup> ‘Cocaine Seizures by Customs See Sharp Rise in 2023’ (Government of the Netherlands, 17 January 2024), <https://www.government.nl/latest/news/2024/01/17/cocaine-seizures-by-customs-see-sharp-rise-in-2023>; ‘La Belgique et les Pays-Bas interceptent conjointement 160 tonnes de cocaïne grâce à une coopération et un échange d’informations intenses’, *News.belgium*, 10 January 2023, <https://news.belgium.be/fr/la-belgique-et-les-pays-bas-interceptent-conjointement-160-tonnes-de-cocaine-grace-une-cooperation>; Dom Magli, ‘Port of Antwerp-Bruges Plans Mandatory ID-Based Container Pick-Up’, *Port Technology International*, 7 July 2023, <https://www.porttechnology.org/news/port-of-antwerp-bruges-plans-mandatory-id-based-container-pick-up/>; Syed Rakin Rahman, ‘Port of Rotterdam Introduces Stricter Security for Containers’, *Port Technology International*, 5 March 2024, <https://www.porttechnology.org/news/port-of-rotterdam-introduces-stricter-security-for-containers/>.

<sup>66</sup> ‘Cocaine – the Current Situation in Europe (European Drug Report 2024)’.

<sup>67</sup> Interview with member of Belgium Federal Police, December 2024.

<sup>68</sup> ‘Understanding Europe’s Drug Situation in 2024 – Key Developments (European Drug Report 2024)’ (European Union Drugs Agency (EUDA)), accessed 21 January 2025, [https://www.euda.europa.eu/publications/european-drug-report/2024/drug-situation-in-europe-up-to-2024\\_en](https://www.euda.europa.eu/publications/european-drug-report/2024/drug-situation-in-europe-up-to-2024_en).

<sup>69</sup> Interview with member of Belgium Federal Police, December 2024

<sup>70</sup> Interview with Belgian Prosecutor’s Office, December 2024; Interview with member of Belgium Federal Police, December 2024

<sup>71</sup> ‘EU Drug Market, Cocaine’ (European Union Drugs Agency (EUDA), 2022), <https://data.europa.eu/doi/10.2810/944155>.

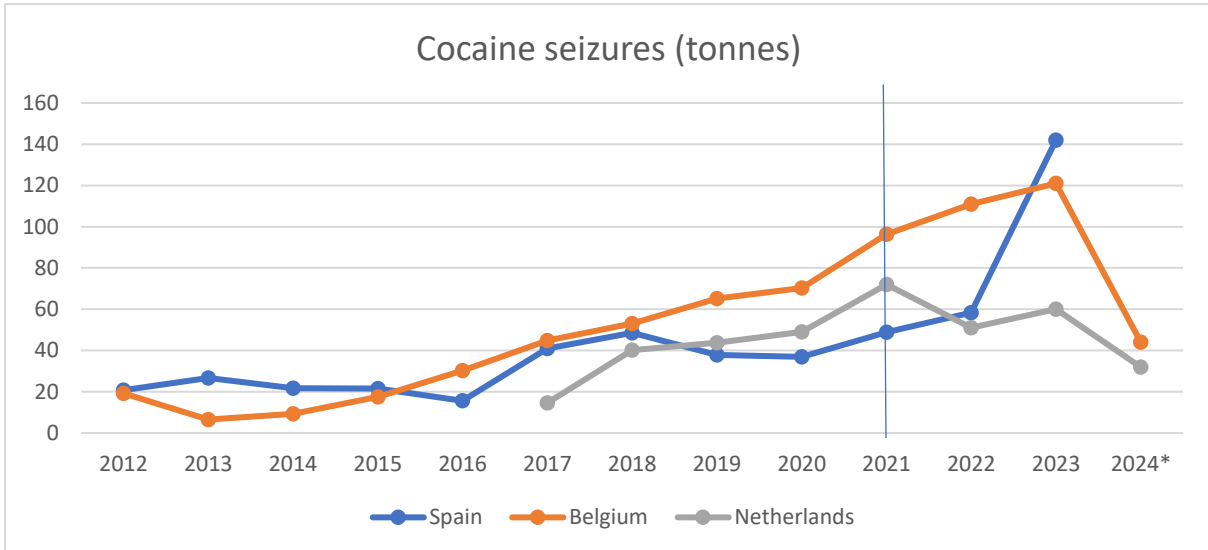
<sup>72</sup> “‘Europe’s Got a Problem’ — Drug Violence Grips Belgium’s Second City’, *POLITICO*, 7 September 2023, <https://www.politico.eu/article/antwerp-belgium-drug-violence-europe-problem/>.

<sup>73</sup> ‘Spain Seizes 13 Tonnes of Cocaine Worth £659m in Biggest Drug Raid in Its History’, *Sky News*, accessed 21 January 2025, <https://news.sky.com/story/spain-seizes-13-tonnes-of-cocaine-worth-659m-in-biggest-drug-raid-in-its-history-13249884>.

<sup>74</sup> Editorial, ‘Swedish Customs Seizes Five Tons of Drugs in First Half of the Year’, *The Nordic Times* (blog), 10 July 2024, <https://nordictimes.com/the-nordics/sweden/swedish-customs-seizes-five-tons-of-drugs-in-first-half-of-the-year/>.

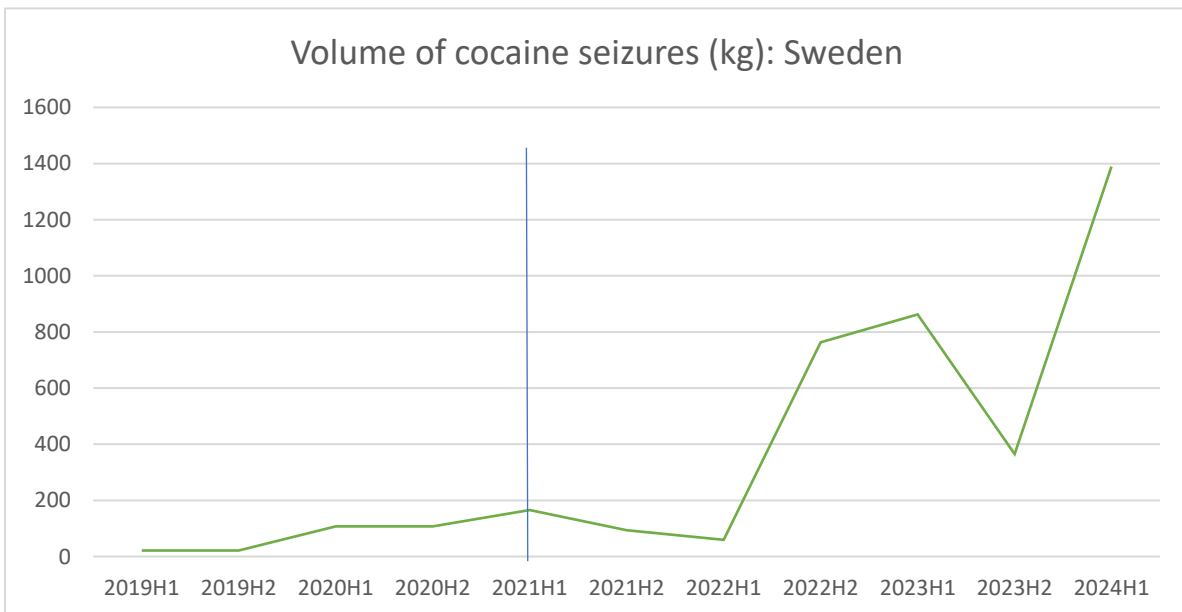
<sup>75</sup> Stephen Smith, ‘U.K. Police Find \$568 Million of Cocaine Hidden in Bananas, Shattering Drug-Seizure Record’, *CBS News*, 23 February 2024, <https://www.cbsnews.com/news/568-million-cocaine-hidden-bananas-record-drug-seizure-uk-southampton/>.





**Figure 6:** Volume of cocaine seizures at major importing countries.  
 2024 data for the Netherlands estimated by doubling seizures recorded during first six months.  
 Blue line indicates date of Sky ECC

largest seizure to date occurred at the port of Hamburg (See Figures 6<sup>76</sup> and 7<sup>77</sup>).<sup>78</sup> Similarly, Norwegian customs made 1,847 drug seizures in 2023, more than the previous 10 years combined, including record quantities of cocaine, while Denmark also experienced a rise in seizures.<sup>79</sup>



**Figure 7:** Volume of cocaine seizures by Swedish customs.  
 Blue line indicates date of Sky ECC

<sup>76</sup> ‘Statistical Bulletin 2024 — Seizures of Drugs’; Beatriz Vicent Fernández, ‘Spain Reclaims Position as Cocaine Gateway to Europe’, InSight Crime, 30 October 2024, <http://insightcrime.org/news/spain-reclaims-position-as-cocaine-gateway-to-europe/>.

<sup>77</sup> ‘Beslagsstatistik’, Tullverket (Tullverket, 3 October 2024), <http://www.tullverket.se/omoss/dethargortullverket/beslagsstatistik.4.226de36015804b8cf353949.html>.

<sup>78</sup> Claire Gilbody Dickerson, ‘Germany Seizes 35.5 Tonnes of Cocaine in “Largest Bust of the Class A Drug in Europe”’, Sky News, 17 June 2024, <https://news.sky.com/story/germany-seizes-35-5-tonnes-of-cocaine-in-largest-bust-of-the-class-a-drug-in-europe-13154478>.

<sup>79</sup> ‘Norway’s Capital Becomes New Target for Drug Smugglers’, Dawn Digest, 29 July 2024, <https://www.dawndigest.com/news/norways-capital-becomes-new-target-for-drug-smugglers>; ‘Cocaine Seizures Fall in Big EU Ports as Gangs Target Easier Routes’.



The divergences in seizure data mirror variations in consumption rates over recent years. Just as decreasing consumption rates and seizures in Belgium and the Netherlands defied the European trend, other areas which have recorded especially large increases in cocaine seizures, most notably Northern Europe and the Mediterranean, have witnessed some of the highest growth in consumption rates. The four cities with the largest consumption rate increase in 2023 were all in Scandinavia and the Baltics,<sup>80</sup> which have been highlighted as areas with an expanding OCG presence and have emerged as hotspots for cocaine importation.<sup>81</sup>

These Northern European and Mediterranean ports are unlikely to replace Antwerp and Rotterdam as major import hubs but instead reflect a fragmentation of the market as OCGs seek to spread risk by avoiding major ports with ramped up security measures and targeting a wider variety of smaller ports. This has been observed at the sub-national level also. Italian experts describe a move away from traditionally larger ports in favour of more peripheral ports.<sup>82</sup> In Sweden, historically less significant ports like Helsingborg have also been exploited as “soft spots”.<sup>83</sup> Even within Belgium and the Netherlands, traffickers appear to be spreading risk by smuggling cocaine in smaller shipments. The 2024 reduction in seized volume was not due to a reduction in the number of seizures, which increased from 123 in 2023 to 134, but the number of large seizures (over two tonnes), which fell from 13 to two over the same period.<sup>84</sup>

### Violence Impacts

In the case of Sky ECC, mass arrests and convictions do not appear to have had a significant impact on rates of drug-related violent crime. There was no dramatic spike in violence following the operation, nor any decrease in the medium to long-term.

Figure 8 shows that in the Netherlands, homicide rates remained stable between 2014 and 2024.<sup>85</sup> In Belgium, there was a 20% increase in killings in 2022, the year following Sky ECC.<sup>86</sup> However, only a relatively small percentage are directly connected to drug gang disputes and may therefore be unconnected to Sky ECC.

In the short-term following Sky ECC, drug gangs did not appear to have been intimidated into a withdrawal from violent activity. In some cases, they escalated, with several high-profile assassinations and threats following the operation. The shooting of renowned crime reporter Peter de Vries, in what was one of the Netherlands’ most high-profile killings, occurred within four months of the first Sky ECC arrests.<sup>87</sup> One year later in Belgium, criminal groups threatened the Justice Minister, forcing him to retreat with his family to a safe house on two occasions in 2022.<sup>88</sup>

<sup>80</sup> ‘Wastewater Analysis and Drugs — a European Multi-City Study’.

<sup>81</sup> Christopher Newton Manjarrés Juliana, ‘InSight Crime’s 2023 Cocaine Seizure Round-Up’, InSight Crime, 20 March 2024, <http://insightcrime.org/news/insight-crimes-cocaine-seizure-round-up-2023/>.

<sup>82</sup> Interview with EUROPOL representative, December 2024.

<sup>83</sup> ‘Cocaine Whac-A-Mole: A Game Brussels Is Playing to Win’, POLITICO, 16 October 2023, <https://www.politico.eu/article/cocaine-whac-a-mole-drug-trafficking-europe-game-brussels-is-playing-to-win/>.

<sup>84</sup> ‘Moins de cocaïne saisie dans le port d’Anvers, davantage à la source en Amérique latine’.

<sup>85</sup> ‘125 mensen vermoord in 2023’, webpagina, Centraal Bureau voor de Statistiek, 29 August 2024, <https://www.cbs.nl/nl-nl/nieuws/2024/35/125-mensen-vermoord-in-2023>.

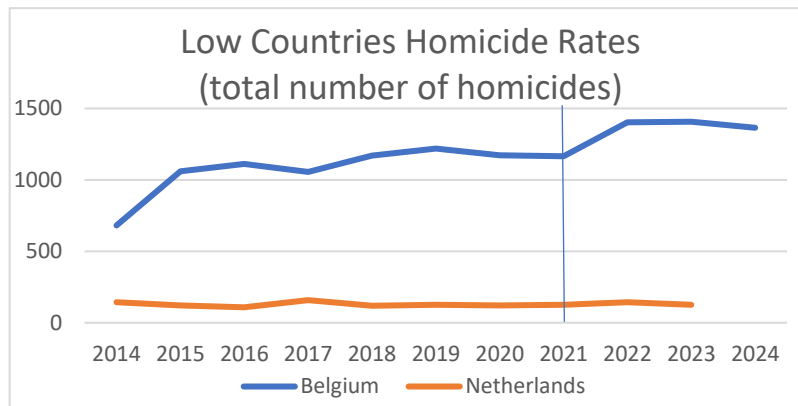
<sup>86</sup> ‘Statistiques Policières de Criminalité: Belgique, 1er Trimestre 2024’ (Police Fédérale, 2024), [https://www.police.be/statistiques/sites/statspol/files/statistics\\_files\\_upload/Criminalite%C3%A9%20-%20Criminaliteit/2024/2024\\_T01/crimi\\_fr/01\\_Rapports/01\\_F%C3%A9d%C3%A9ral/rapport\\_2024\\_trim1\\_nat\\_belgique\\_fr.pdf](https://www.police.be/statistiques/sites/statspol/files/statistics_files_upload/Criminalite%C3%A9%20-%20Criminaliteit/2024/2024_T01/crimi_fr/01_Rapports/01_F%C3%A9d%C3%A9ral/rapport_2024_trim1_nat_belgique_fr.pdf).

<sup>87</sup> ‘Peter R de Vries: Dutch Crime Reporter Dies after Shooting’, *BBC News*, 15 July 2021, sec. Europe, <https://www.bbc.com/news/world-europe-57853004>.

<sup>88</sup> “Europe’s Got a Problem” — Drug Violence Grips Belgium’s Second City’.

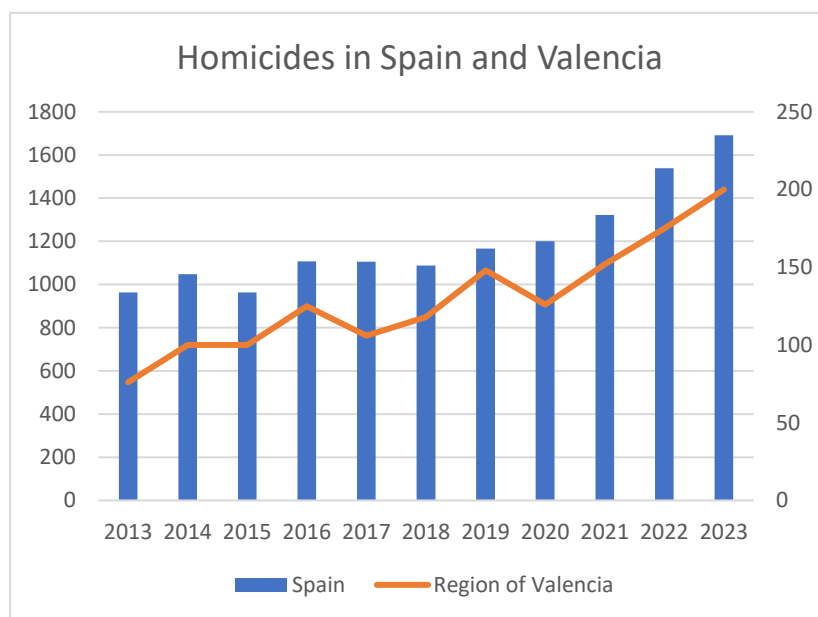


Nor does the operation seem to have reduced violent crime between drug gangs in the medium to long term. Brussels witnessed a record number of shootings in 2024, most of which were believed to be drug-related.<sup>89</sup> In Antwerp, 91 incidents of drug-related violence were recorded during the first 11 months of 2024 – a 30% increase compared to the whole of 2023.<sup>90</sup>



**Figure 8:** Belgian 2024 data is an estimate based on data from first trimester. Belgian data also includes manslaughter, which is partly why the rate is so much higher than the Netherlands. Blue line indicates date of Sky ECC.

Law enforcement practitioners state that home invasions by these criminal groups occur almost nightly in Antwerp and that criminals are currently firing large numbers of high explosive fireworks sourced from eastern Europe into buildings to intimidate rivals.<sup>91</sup> The vast quantities of cocaine supplied from South America have also led to growing cocaine stockpiles which are the source of inter-gang conflicts and are thought to be behind the rising number of daytime shootings in Belgium.<sup>92</sup> Figure 8 below, shows the homicide rates in Belgium and the Netherlands from 2014 to 2024.<sup>93</sup>



**Figure 9:** Murder rates in Spain and the region of Valencia.

Not only is violent crime rising in Sky ECC-affected areas, but countries negatively affected by the geographic displacement of cocaine trafficking networks are also experiencing greater rates of drug-related violence. In Spain, which overtook Belgium and the Netherlands for cocaine seizures in 2023, the homicide rate has increased significantly since 2018 and in Valencia, Spain's cocaine import capital,<sup>94</sup> this rate has more than doubled since 2015 with a particularly notable increase since 2021 (see figure 9).<sup>95</sup> Sweden's growing status as a cocaine importer is

<sup>89</sup> Rita Alves, '89 and Counting – Brussels Sees Surge in Shootings in 2024', 27 December 2024, <https://www.brusselstimes.com/1367055/89-and-counting-brussels-sees-surge-in-shootings-in-2024>.

<sup>90</sup> 'Antwerp Drug Violence at All-Time High: 91 Incidents Already This Year', The Brussels Times, 24 November 2024, <https://www.brusselstimes.com/1325218/drug-violence-in-antwerp-increasing-significantly-91-incidents-this-year>.

<sup>91</sup> Interview with member of Belgium Federal Police, December 2024.

<sup>92</sup> Interview with Belgian Prosecutor's Office, December 2024.

<sup>93</sup> 'Deaths; murder and manslaughter, crime scene in The Netherlands', StatLine, August 2024, <https://opendata.cbs.nl/statline/#/CBS/en/dataset/84726ENG/table>; 'Statistiques Policières de Criminalité: Belgique, 1er Trimestre 2024'; '125 mensen vermoord in 2023'.

<sup>94</sup> Dolz, 'Drug Trafficking, More Powerful than Ever, Floods Europe with Cocaine'.

<sup>95</sup> 'Crime Statistics Portal', Ministerio del Interior, accessed 21 January 2025, <https://estadisticasdecriminalidad.ses.mir.es/publico/portalestadistico/en/>.







accompanied by a rise in gang violence over the past decade, peaking in 2023 with the EU's highest rate of deadly gun violence per capita by a significant margin.<sup>96</sup> This violence reached such a level that the historically peaceful country which once enjoyed low crime rates brought the army onto the streets.<sup>97</sup> The government appears to have succeeded in bringing down violent crime statistics in 2024, but only with great effort.<sup>98</sup>

It therefore seems that not only has the Sky ECC operation failed to reduce violent crime rates in Belgium and the Netherlands, but the displacement of cocaine shipping routes provoked by disruptive law enforcement methods may have contributed to rising violence in areas which are increasingly exploited by OCGs seeking new avenues to import cocaine into Europe.

### **Analysis and Conclusions**

The Sky ECC case is a paradigmatic example of network disruption. Not only did prosecutors secure over one thousand convictions; previously unreachable 'kingpins' located in Turkey, the UAE and Morocco were extradited and sentenced to long terms in prison.<sup>99</sup> The operation also obtained huge amounts of valuable intelligence and eliminated the primary means of communication used by OCGs.

However, instead of leading to significant reductions in cocaine supply or violent crime, this disruptive action appears to have fragmented and geographically displaced the market. Market disruption seems to have encouraged traffickers to spread their risks in numerous ways, including reducing shipment sizes, moving their focus away from major ports in favour of smaller, less resourced ones, and using more innovative and complex methods to evade detection.

Furthermore, OCGs quickly regrouped on new encrypted messaging platforms, several of which have since been decrypted by law enforcement (Ghost, Matrix, Anom).<sup>100</sup> However, in these cases the user base was smaller than Sky ECC (Ghost had only four active users in Italy<sup>101</sup>), indicating that OCGs are using a wider range of encrypted communications platforms.<sup>102</sup> This caution-driven fragmentation is reflected across the market; all officials interviewed noted that smaller cocaine shipments, smaller ports and new routes were all being used by OCGs as risk mitigation measures while the total volumes of cocaine entering Europe continued their upward trend.<sup>103</sup>

On a national level, law enforcement operations in Belgium and the Netherlands such as Sky ECC may have encouraged drug traffickers to seek less risky entry points to access the European market, although this conclusion is only tentative. Nevertheless, even if seizures do continue to fall at Rotterdam and Antwerp, this is likely only to be at the expense of other ports which are seen as weak points in Europe's defences against drug trafficking groups.

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<sup>96</sup> Johan Ahlander, 'Police in Sweden Make Headway against Gang Shootings', Reuters, 19 December 2024, <https://www.reuters.com/world/europe/police-sweden-make-headway-against-gang-shootings-2024-12-19/>.

<sup>97</sup> Jaroslav Lukiv, 'Sweden Gangs: Army to Help Police after Surge in Killings', *BBC News*, 29 September 2023, sec. Europe, <https://www.bbc.com/news/world-europe-66964723>.

<sup>98</sup> Ahlander, 'Police in Sweden Make Headway against Gang Shootings'.

<sup>99</sup> 'L'affaire Sky ECC, plongée vertigineuse dans les méthodes des narco-trafiquants', *Le Point*, 30 November 2022, [https://www.lepoint.fr/monde/l-affaire-sky-ecc-plongee-vertigineuse-dans-les-methodes-des-narco-trafiquants-30-11-2022-2499868\\_24.php](https://www.lepoint.fr/monde/l-affaire-sky-ecc-plongee-vertigineuse-dans-les-methodes-des-narco-trafiquants-30-11-2022-2499868_24.php); Interview with member of Belgium Federal Police, December 2024

<sup>100</sup> Laura Dubois, 'Global Police Dismantle Encrypted Messaging App Used by Criminals', *Financial Times*, 18 September 2024; 'International Operation Takes down Another Encrypted Messaging Service Used by Criminals', Europol, 3 December 2024, <https://www.europol.europa.eu/media-press/newsroom/news/international-operation-takes-down-another-encrypted-messaging-service-used-criminals>.

<sup>101</sup> Interview with EUROPOL representative, December 2024.

<sup>102</sup> Dubois, 'Global Police Dismantle Encrypted Messaging App Used by Criminals'.

<sup>103</sup> Interview with EUROPOL representative, December 2024; Interview with member of Belgium Federal Police, December 2024; Interview with Belgian Prosecutor's Office, December 2024; 'Cocaine Seizures Fall in Big EU Ports as Gangs Target Easier Routes'.





Concerning violent crime, Sky ECC and similar operations appear to have had no meaningful impact in Belgium and the Netherlands, except possibly contributing to a slight increase in the homicide rate in Belgium, while violence notably increased in new cocaine import hotspots. Once again, the social costs of this market disruption are primarily felt by those on the receiving end of this geographical displacement.





# Ireland: Police Interventions, Criminal Feuds and Drug Market Responses<sup>104</sup>

## Overview

With a postcolonial history steeped in paramilitary struggles and challenges, the Irish state has repeatedly shown a willingness and resolve to tackle challenges when they become overt. Following the steady growth of the drug market in key urban areas, and a series of high-profile assassinations by OCGs in the 1990s, the Irish state launched a whole-of-state response aimed at decapitating these groups and suppressing the drug market which enriched and empowered them. This case study looks at the evolution of Irish gang dynamics, the changing governance of the drugs trade and various state responses aimed at suppressing them. The state, as we will show, demonstrated significant successes in disrupting OCGs, removing any sense of overt impunity from criminal groups. Numerous criminal gang leaders have been arrested, many have fallen victim to internal feuds and groups have fragmented over time. Nevertheless, on the latter front, the impact on the drug market has been limited. Drug prices have continued to decline, drugs remain plentiful and criminal gangs continue to adapt to a changing enforcement environment and maintain supplies of illicit drugs into the Irish market.

## Background

Ireland has generally been considered a peaceful country with a homicide rate lower than the global average.<sup>105</sup> However, the 1994 assassination of crime boss Martin “the general” Cahill ended his role as the country’s leading crime figure and ushered in an unprecedented period of violence in the criminal underworld centred on the illegal drugs market.<sup>106</sup> On 7 June 1996, the Irish police officer (Garda) Jerry McCabe was murdered by an armed Provisional Irish Republican Army (PIRA) gang in the course of a robbery in County Limerick. His colleague Ben O’Sullivan was seriously wounded but survived. Nineteen days later the investigative crime journalist Veronica Guerin was assassinated while sitting in traffic just outside Dublin city. Guerin had become a national celebrity, fearlessly publishing articles in the national newspapers on drug kingpins, exposing their identities, locations and assets. The assassination of a journalist for the first time sent shock waves through the country, galvanizing political determination to tackle organised crime.

These pivotal political moments were later followed by the assassinations of two civilians in Limerick city during a particularly violent feud in 2009<sup>107</sup> and the attempted assassination of multiple members of a pan-national OCG in February 2016 which provoked a backlash of retaliation, bloodshed and assassinations that was unprecedented in Ireland, as criminal rivals sought retribution and drug market primacy through assassinations, murders, and related attempts.

## Organised Crime Trends in Ireland

The 1970-2002 period (figure 10) indicates a gradual increase in reported crimes, peaking in 1986 and thereafter remained generally below the 100,000 threshold with some notable reductions in the 1997

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<sup>104</sup> This case study is based on various discussions with senior Irish police and research conducted for GI-TOC by Dr Jack Nolan: Jack Nolan, ‘Assassinations and Feuds in Ireland’ (Geneva: The Global Initiative Against Transnational Organized Crime, Forthcoming).

<sup>105</sup> ‘Victims of Intentional Homicide, 1990-2018’, United Nations Office on Drugs and Crime, accessed 21 January 2025, <https://data.unodc.org/content/data/homicide/homicide-rate>.

<sup>106</sup> James Windle, ‘The Causes and Consequences of Gangland Violence in the Republic of Ireland’, in *Organized Crime: Causes and Consequences*, ed. Robert M Lombardo (Nova, 2019).

<sup>107</sup> ‘Wayne Dundon and Nathan Killeen Guilty of Roy Collins Murder’, *BBC News*, 15 July 2014, sec. Europe, <https://www.bbc.com/news/world-europe-28315128>.



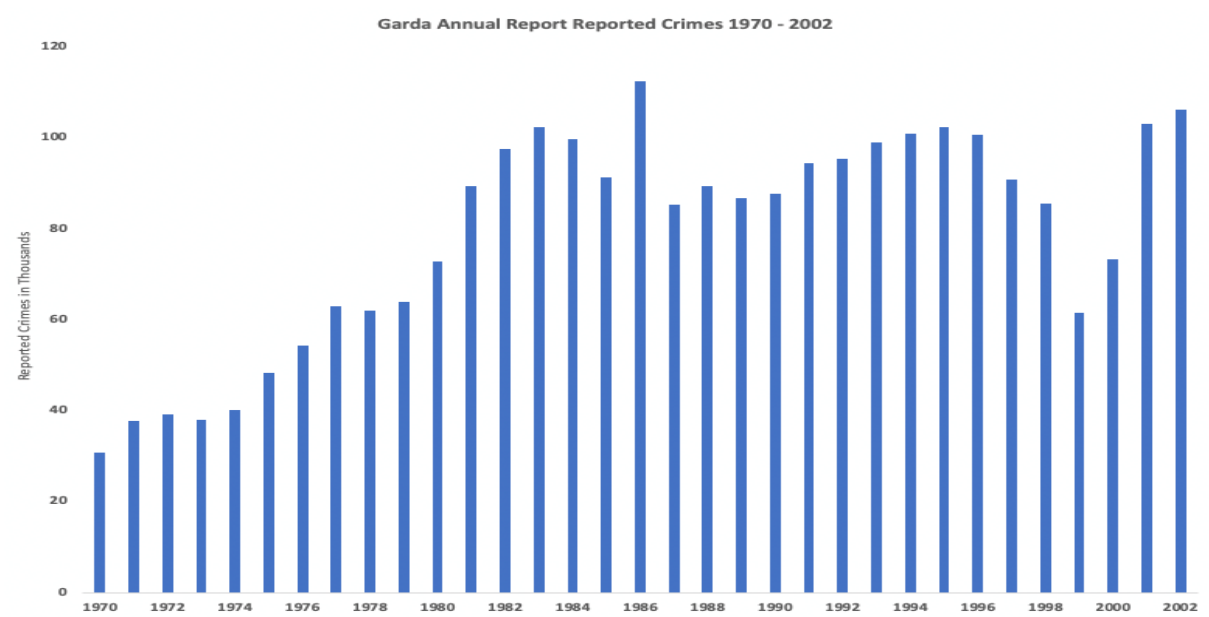


Figure 10: Reported Crime 1970-2002, adapted from An Garda Síochána Annual Crime Reports.

-2000 period before commencing a gradual increase once again. The massive police efforts of the 1996-1997 period after the McCabe and Guerin assassinations likely contributed to this decrease. Alongside this, drug market sale and supply offences increased, with a significant upward trend in cocaine seizures from 1995-2002 – with an estimated 1,200% increase.<sup>108</sup> The economic boom of this period (which became known as the ‘Celtic Tiger’) was likely a significant contributory factor in this drug market increase.<sup>109</sup> The data also indicates that as organised crime feuding commenced at the beginning of the 2000s (see below), recorded crime was once again on an upward trend.<sup>110</sup>

An upward trend in reported crime post-2000 is discernible. Figure 11 illustrates the trend continued until 2008, when arguably once again the effects of the 2009 anti-crime legislation package against organised crime began to take effect once again.<sup>111</sup>

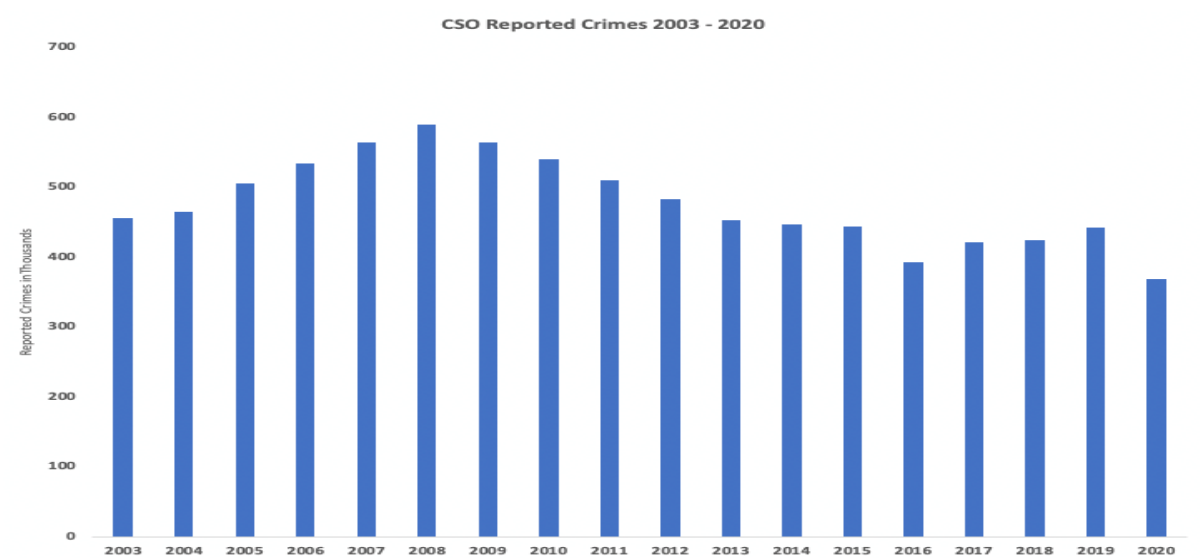


Figure 11: Reported Crimes 2003-2020, Adapted from Central Statistics Office (CSO).

<sup>108</sup> Johnny Connolly, ‘The Illicit Drug Market in Ireland. Overview 2.’, Report (Dublin: Health Research Board, 2005), <https://www.drugsandalcohol.ie/6018/>.

<sup>109</sup> Interview with Jack Nolan, January 2025.

<sup>110</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>111</sup> Interview with Jack Nolan, January 2025.



Figure 12 illustrates that the murder rate increased steadily up to the mid-2000s, peaking in 2006-2007 when the first Dublin feud (the Crumlin-Drimnagh OCG feud) was at its height, remaining high but stable until 2014 and then trending upwards again until 2018, followed by smaller reductions thereafter. This likely reflects the spate of assassinations associated with the second Dublin feud (the Hutch-Kinahan Feud) in 2016.<sup>112</sup> These feuds coincided with changing trends across different crime types. Firearm offences remained consistent between 2000-2020,<sup>113</sup> whereas armed robberies dramatically declined, indicating changing OCG trends, effective police disruptions of OCGs and improved security by target institutions. In contrast, sale and supply drug offences rose by almost 200% in the same period. As such, despite internal strife among criminal groups and drastically increased police pressure, drug market supply continued a general upward trend independent of these forces.

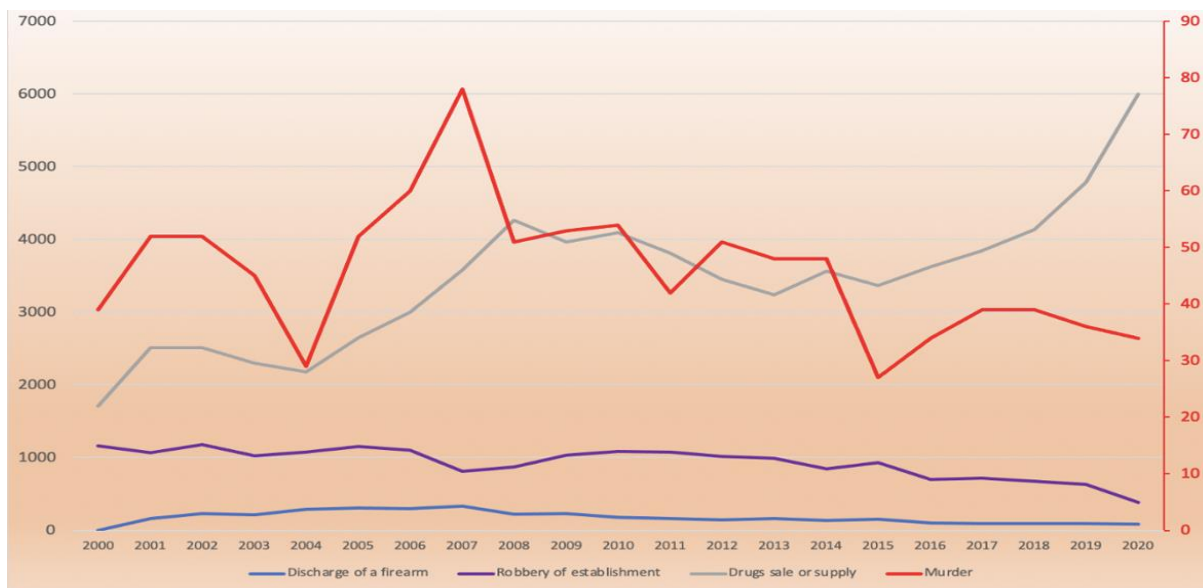


Figure 12: Selected Recorded Crime Offences: Source adapted from An Garda Síochána Annual Crime Reports and CSO 2000-2020

Revenue and Customs data during 2015-2020 demonstrates an almost 100% increase in drug importation offences by value from €23m to €44.8m. Meanwhile, tobacco and cigarette smuggling remained fairly consistent at €34-€37m across the same period.<sup>114</sup> Other research has noted that competition within the drug trade led to an upsurge in homicides in the early to mid-2000s,<sup>115</sup> and it is estimated that between 1996-2009 there were an estimated 146 OC-related killings<sup>116</sup> in contrast to the period 1971-1991, when the state response to drug markets was perceived as weak and limited, when there were only two such killings.<sup>117</sup>

### Changing Drug Market Actors in Ireland

The Dunne family emerged as Ireland's leading OCG in the 1970s, building the first Irish links with transnational drug networks. Their monopolisation of the Dublin drug trade was eventually broken by police pressure and community outrage. However, the cohort of young criminals which the group

<sup>112</sup> Nolan, 'Assassinations and Feuds in Ireland'.

<sup>113</sup> Liz Campbell, 'Responding to Gun Crime in Ireland', *The British Journal of Criminology* 50, no. 3 (1 May 2010): 414-34, <https://doi.org/10.1093/bjc/azq006>.

<sup>114</sup> Annual Report of Revenue (Irish Tax and Customs 2015-2020, [www.revenue.ie](http://www.revenue.ie), ISSN16495292, Dublin Castle, Ireland, accessed 10.07.2021).

<sup>115</sup> Shane Kilcommins, *Crime, Punishment and the Search for Order in Ireland* (Institute of Public Administration, 2004).

<sup>116</sup> Vicky Conway and M. Mulqueen, 'The 2009 Anti-Gangland Package: Ireland's New Security Blanket?', *Irish Criminal Law Journal* 19(4) (2009): 106-13.

<sup>117</sup> Enda Dooley, 'Homicide in Ireland 1972-1991', Report (Stationery Office, 1995), 16, <https://www.lenus.ie/handle/10147/337753>.



attracted became the future generation of OC in Ireland.<sup>118</sup> Foremost among these was, Martin “the General” Cahill.

Until his assassination in 1994, Cahill violently challenged and publicly ridiculed state institutions, while undertaking large scale thefts of art, jewellery, and cash in transit, evading prosecution during the largest police surveillance operation ever mounted in the country.<sup>119</sup> Cahill was assassinated in 1994, ostensibly by the PIRA for collaborating with Northern Ireland loyalist groups. However, informed police sources have long harboured strong suspicions of a subordinate criminal gang involvement whose rising power was fuelled by involvement in the drugs trade.<sup>120</sup>

The Cahills OCG avoided the drugs market and were supplanted by the rise of the Gilligan OCG, which assumed control of the Irish underworld and drug market to the extent that it engineered the assassination of investigative journalist Veronica Guerin in 1996. The Gilligan OCG was brought down by an intense police effort in response to the Guerin murder. This set the stage for a new generation of criminals to contest the Irish drug market.<sup>121</sup>

### The Emergence of the 2000s Feuds

The 2000s ushered in an era of unprecedented conflict and violence in Ireland as OCGs fought to control the drug market and assume primacy over rivals.<sup>122</sup> These conflicts brought repeated periods of intense police pressure and attention, with broad efforts to suppress OCGs and the drug markets they ran. As such, the feuds provide a useful proxy for police enforcement efforts to decapitate these gangs and their ability to run the drugs trade. The period demonstrates a repeated story of significant state and police enforcement and operational successes against criminal gangs, while yielding no clear impact on reducing overall drug market trends or supply at either local or national levels.

Assassinations increased from three in 1993 to 20 by 2003 and estimates suggest that by 2011 this figure increased to more than 200.<sup>123</sup> From 2000-2020 Ireland experienced a series of feuds and infighting within a number of OCGs in three geographical areas, the Crumlin-Drimnagh area and Northeast Inner City in Dublin, and Limerick city in the southwest of the country. These three feuds are distinguished from other OCG disputes and random killings by their clearly identifiable competing factions, longevity, violence, and national impact. Other contributory factors such as the availability of high-powered firearms, drugs distribution and drug debts and suspicion of police informing have been cited as causal factors.<sup>124</sup> Police sources suggest that the outbreaks of feuding involved deep-seated hatred between some criminals, drug deals going astray and police successes arousing internal suspicions within gangs.

Another factor was the seeming ease with which both national and international ‘hitmen’ could be sourced by rival gangs.<sup>125</sup> The fallout from these drug market feuds culminated in what then Minister for Justice Dermot Ahern remarked as events that had “brought communities to their knees and constituted a threat to the nation”.<sup>126</sup>

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<sup>118</sup> Interview with Jack Nolan, January 2025.

<sup>119</sup> Operation Tango was a round-the-clock police surveillance operation targeting Martin Cahill.

<sup>120</sup> Interview with Jack Nolan, January 2025.

<sup>121</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>122</sup> Paul Williams, *Badfellas* (Penguin UK, 2011), 383.

<sup>123</sup> It is very difficult to definitively say how many people were assassinated in OCG feuding as the Central Statistics Office do not record or categorise inter-OCG conflict as a cause of homicide. Access to police files is not possible as many investigations remain open.

<sup>124</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>125</sup> Jack Nolan’s interviews in April 2021 with police officers involved in the investigations of the feuds.

<sup>126</sup> Alan Greene, ‘Shielding the State of Emergency: Organized Crime in Ireland and the State’s Response’, SSRN Scholarly Paper (Rochester, NY: Social Science Research Network, 1 September 2011), <https://papers.ssrn.com/abstract=1966546>.

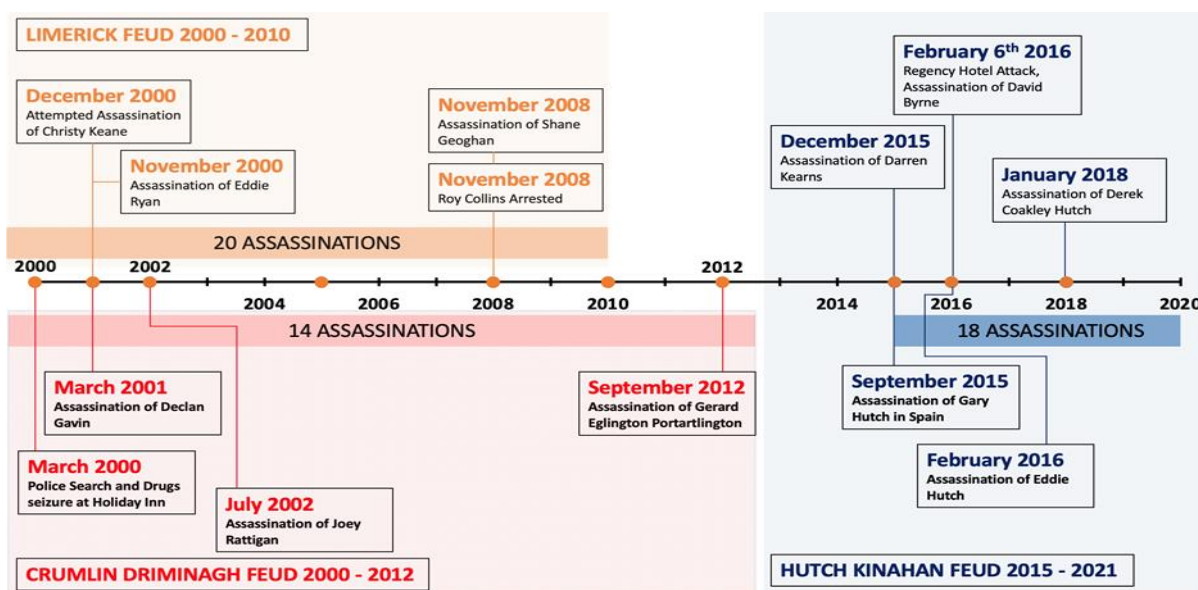


Figure 13: Selected incidents in Ireland's Feuds 2000-2021.

### The Crumlin-Drimnagh OCG Feud 2000-2012

The first feud was ignited by successful police enforcement against the drug market. The feud occurred in a densely populated south Dublin inner-city suburb characterised by a large amount of social housing, where many OCG members with deep links to the drugs trade resided. The vicious 2000-2012 conflict emerged following a series of police drug seizures which precipitated the fracturing of a dominant OCG with internal accusations of informing to law enforcement. The core of the OCG consisted of family, close relatives and trusted associates who came to prominence following the decline of the Cahill and Gilligan OCGs.<sup>127</sup>

Police sources indicate that the feud arose when three gang members booked into a hotel in Dublin in March 2000 to cut and mix cocaine and ecstasy, and were arrested by the police after hotel staff became suspicious. Relationships within the gang were already strained due to earlier police drug seizures, and when only two members were charged, suspicions boiled.<sup>128</sup> Tensions escalated when a prominent gang member was stabbed outside a fast food outlet in Crumlin with the gang splitting into two factions, one co-headed by Declan Gavin and 'Fat' Freddy Thomson and the other by Brian Rattigan, the latter two of whom are currently serving prison sentences for murder. Retaliations followed swiftly, resulting in the assassination of Joey Rattigan on in July 2002 and the coining of the phrase that became synonymous with this feud of "brother for brother".<sup>129</sup>

Altogether, 14 individuals were assassinated, with violence peaking in 2005-2006. Police sources estimate that as many as 100 individuals on both sides became entangled with many far-reaching consequences and no shortage of fresh recruits willing to replace deceased gang members. Shootings, sophisticated weaponry, and pipe bombs were commonly used in tit-for-tat incidents and assassinations were publicly celebrated by the warring factions. A decade later scores were still being settled, sometimes far from Crumlin and Drimnagh.<sup>130</sup> There were also innocent victims caught in the wrong place at the wrong time.<sup>131</sup>

<sup>127</sup> Nolan, 'Assassinations and Feuds in Ireland'.

<sup>128</sup> Mick McCaffrey, *Cocaine Wars: Fat Freddie Thompson and the Crumlin/Drimnagh Feud* (Merlin Pub., 2010).

<sup>129</sup> Jack Nolan Interview with police investigator May 2021.

<sup>130</sup> Gerard Eglington was assassinated on 24/09/2012 in Portarlinton. Co. Laois where he had relocated approx. 100 kms from the feud scene. Declan O'Reilly was assassinated on 25/09/2012.

<sup>131</sup> On 5<sup>th</sup> October 2007 Edward Ward was an innocent bystander who was most likely assassinated because he witnessed the murder of Brian Downes, who was a garage owner.





### The Limerick Feud

The second major feud emerged in the city of Limerick in the southwestern part of Ireland. Limerick holds a reputation for violence and for being home to a hard core of violent criminals, earning it the title of “stab city” in the 1980s.<sup>132</sup> From 1992-1996 Limerick city and county had a homicide rate twice the national average.<sup>133</sup> As the 1980s progressed, the illicit drug markets continued to migrate from Dublin to the provinces. Limerick city became a major hub for OCGs who utilised the area’s coast and airports to import drugs and establish elaborate distribution networks from their bases in disadvantaged communities. Some of the earliest drug manufacturing seizures by the police occurred in Limerick County in the early 1980s.<sup>134</sup>

The return to Limerick of a volatile and violent family gang, the Dundon-McCarthys, in 2000 from Manchester, UK, and their alliance with the locally based Ryan gang, coupled with a subsequent double cross of another traditional criminal grouping, the Keane-Collopy gang, led to an ensuing rivalry. The feud resulted in a spate of assassinations, attempted assassinations, and the deaths of up to 20 individuals as well as many shootings, kidnappings, and pipe bomb attacks. Between 2000-2009 there were 556 recorded discharges of firearms in Limerick.<sup>135</sup> There were also notable deaths of innocent people such as Shane Geoghegan<sup>136</sup> and Roy Collins.<sup>137</sup> Entire communities were terrorised by OCGs attempting to exert significant control over the local population, including through intimidation of witnesses and their families.

A major policing operation subsequently degraded the rival gang’s ability to operate, with many OCG members receiving lengthy prison sentences. These operations notably resulted in a reduction in violence in Limerick. However, there is no evidence to suggest that the operations had a significant impact on drug supply in Limerick.<sup>138</sup>

### The Hutch-Kinahan Feud

The third feud commenced on 5 February 2016, when OCG members armed with military grade weapons and disguised as members of the Garda’s armed Emergency Response Unit (ERU) attacked rival gang members during a professional boxing event at the Regency Hotel in Dublin. Many of the intended targets narrowly avoided assassination. Police investigations quickly identified the Hutch OCG from Dublin’s inner city as the attacker.<sup>139</sup> One member of the Kinahan OCG was killed in the hotel foyer and two others were seriously wounded. Both OCGs originated from neighbouring inner-city streets and had frequently intermingled socially and jointly cooperated in the drug market and other illicit trade ventures.<sup>140</sup>

The Hutch OCG led by Gerry Hutch had a long-established reputation for carefully planned and executed large-scale robberies<sup>141</sup> and illicit smuggling through Dublin’s docklands. Due to police

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<sup>132</sup> James Browne, 2011, “The Impact of New Legislation on Organized Crime in Ireland, Dissertation submitted in part fulfilment of the requirement for a BA Degree in Police Management.” Garda College, Templemore: Ireland Unpublished, April.

<sup>133</sup> Dooley, ‘Homicide in Ireland 1972-1991’.

<sup>134</sup> On 02/12/1982, 160kg of amphetamines with an estimated street value of £2.4 was located at Knocklong and Shannon Co. Limerick, Sean Flynn and Padraig Yeates, *Smack: The Criminal Drugs Racket in Ireland* (Gill and Macmillan, 1985), 77.

<sup>135</sup> Browne, “The Impact of New Legislation on Organized Crime in Ireland”.

<sup>136</sup> Shane Geoghegan, a 26-year-old rugby player was assassinated in November 2008 in a case of mistaken identity in Limerick, he lived close to the intended target.

<sup>137</sup> Roy Collins was assassinated in April 2009 in an apparent attempt to intimidate witness against the McCarthy-Dundon gang.

<sup>138</sup> Interview with senior retired Irish Police, January 2025.

<sup>139</sup> Garda Press Conference, Ballymun Garda Station 06/02/2016.

<sup>140</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>141</sup> The Hutch organized crime group were the prime suspects for the Marino Mart Robbery in January, 1987 and €2.8 Brinks-Allied Robbery in Dublin on 24/01/1995. Williams, *Badfellas*.





pressure, they were largely considered inactive on the Irish OC scene.<sup>142</sup> The Kinahans were led by Christy “Dapper Don” Kinahan, a career criminal who graduated from low level theft and armed robbery to transnational drug importation and distribution. They had established connections and business with international OCGs from Russia to Colombia and were one of the targets of the international law enforcement operation ‘Operation Shovel’, in 2010.<sup>143</sup>

This feud was notable given that extreme violence at the high end of the international drug market is unusual as it attracts political, police, and media attention.<sup>144</sup> The feud was also notable in an Irish context for the number of international assassinations, international criminal actors and much international press coverage particularly relating to the Kinahan professional boxing enterprises.<sup>145</sup>

The feud’s origins have been traced to the 2015 assassination of a senior member of the Hutch OCG in Spain.<sup>146</sup> Within days of the Regency assassination, Hutch OCG members and their relatives were systemically targeted. The ability of the Kinahan OCG to engage international hitmen within Ireland indicated their reach and power Eighteen people were assassinated altogether. Police sources claim that up to 75 other attempted assassinations have been thwarted by police actions since 2015.<sup>147</sup> Following this feud, the Kinahan OCG has solidified its dominant position within Irish and international drug markets, despite unprecedented levels of national and international police attention. On 12 April 2022 the US Office of Foreign Asset Control placed the leadership of the Kinahan OCG on a Specially Designated National List with a reward of \$5m on Christopher, Daniel and Christy Kinahan Jnr.<sup>148</sup>

### **Legislative Responses to OCGs Since 1996**

While the state response to OCGs prior to the Guerin assassination was limited, the public outcry led to rapid and resolute government action. This divided into a legislative policy response and a policing capacity response. The approach was replicated in 2009 in response to the Limerick feud. Arguably, these policy and legislative innovations also enabled a swifter and more effective response to the 2016 feud that underpinned impressive results in suppressing target OCGs and limiting the violence associated with the feuds.<sup>149</sup> Again, however, no negative impacts on trends within drug markets resulted from these police operational successes against the major OCGs (see below).

The Irish State has shown a repeated tendency to invoke extraordinary legislative measures when it perceives it is threatened, as evidenced by its responses during the Civil War era (1922-1923) and subsequent efforts to tackle paramilitarism. This appears to have been replicated in respect of organised crime.<sup>150</sup> Within the space of five weeks following the Guerin-McCabe murders, the government enacted a comprehensive crime package that included asset seizure and forfeiture, underpinned by the proof applicable to civil rather than criminal law with a seizure and asset recovery

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<sup>142</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>143</sup> Williams, *Badfellas*, 405–21.

<sup>144</sup> Windle, ‘The Causes and Consequences of Gangland Violence in the Republic of Ireland’.

<sup>145</sup> ‘The Suspected Gangster at the Heart of World Boxing’, BBC News, accessed 15 January 2025, <https://bbc.co.uk/news/extra/1y3kadznaf/the-suspected-gangster-at-the-heart-of-world-boxing>.

<sup>146</sup> Conor Lally, ‘The Story of a Feud: How the Kinahan-Hutch War Escalated’, *The Irish Times*, 1 June 2017, <https://www.irishtimes.com/news/crime-and-law/the-story-of-a-feud-how-the-kinahan-hutch-war-escalated-1.3104304>.

<sup>147</sup> Jack Nolan interview with Assistant Commissioner J. O’Driscoll, An Garda Síochána, May 2021.

<sup>148</sup> ‘Kinahan Organised Crime Group Sanctioned by US Department of the Treasury’, Europol, 12 April 2022, <https://www.europol.europa.eu/media-press/newsroom/news/kinahan-organised-crime-group-sanctioned-us-department-of-treasury>.

<sup>149</sup> Jack Nolan Interview, January 2025.

<sup>150</sup> Conway and Mulqueen, ‘The 2009 Anti-Gangland Package’.



mechanism in the form of the Criminal Asset Bureau (CAB).<sup>151</sup> Between 1996-2006 62 legislative acts were passed in the Dáil (Irish Parliament) that contain reference to criminal activity.<sup>152</sup>

The second legislative response to OC followed the killing of an innocent person, Roy Collins, in April 2009 in Limerick apparently as an attempt to intimidate witnesses by OCG factions during the Limerick feud. A swift public, media and political outcry inspired another counter-crime package.<sup>153</sup> This included wide ranging new police powers; the new offence of membership and direction of a criminal gang, prolonged periods of detention and trials before the non-jury Special Criminal Court.<sup>154</sup>

### ***Police Responses to OCGs Since 1996***

In 1996, the police were structurally reorganised to enhance cooperation, coordination, and effectiveness. Operationally, the police enthusiastically embraced the new legal instruments and employed a multi-faceted approach to OC. The perpetrators of the assassinations of McCabe and Guerin were subjected to a whole of government response where resources, expertise and finance were strategically assembled and focused directly on the suspected perpetrators. The newly formed CAB served tax assessments of €3.5m on the leading suspect for the Guerin murder, John Gilligan, then considered the leading organised crime figure in the country. This pattern continued with many other top criminals being similarly assessed. The murder investigations continued at an unprecedented pace with multiple searches, arrests and detentions resulting in significant seizures of firearms, drugs, and cash.<sup>155</sup>

The responses to the 1996 assassinations resulted in significant OCG elements in Ireland emigrating abroad to Amsterdam, Spain, and the Middle East to avoid the relentless ongoing investigations by the CAB. Since its establishment, the CAB, as one of the earliest forms of asset seizures, has returned about €194m-worth of assets to the State and become a model for asset recovery in other jurisdictions.<sup>156</sup>

Thereafter the feuds that engulfed communities in Dublin and Limerick were addressed in a multi-faceted way, of disruption, protection of witness and individuals, and investigations. In the Limerick feud, a proactive anti-crime initiative “Operation Anvil” was extended to include Limerick city and was accompanied by the deployment of the ERU to confront feuding gang members and limit their ability to move freely. This was followed by increases in community policing resources within the vulnerable communities.<sup>157</sup>

In Dublin, following the emergence of the Hutch-Kinahan feud, “Operation Hybrid” was adapted quickly to suppress inter-gang violence, particularly in the inner-city area. It targeted mid-level gang members where their homes were searched systematically, and their assets seized. Their support networks, associates, vehicles, firearms, and money were targeted. A city-wide armed checkpoint system was operated around the clock to impede criminals’ movements. OCG activity was assiduously investigated with police divisions operating multiple investigations simultaneously. International and

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<sup>151</sup> The Criminal Assets Bureau (CAB) is a multi-agency statutory body established under the Criminal Assets Bureau Act 1996. The Bureau’s remit is to target a person’s assets, wherever situated, which derive, or are suspected to derive, directly or indirectly, from criminal conduct.

<sup>152</sup> Irish Statute Book, <https://www.Oireachtas.ie>, accessed 20/04/202.

<sup>153</sup> The counter-crime package included: The Criminal Justice (Surveillance) Act, 2009; The Criminal Justice (Amendment) Act, 2009; The Criminal Justice (Miscellaneous Provisions) Act, 2009; The Criminal Procedure Act, 2010; The Criminal Justice (Money Laundering & Terrorist Financing) Act, 2010; The Criminal Justice (Psychoactive Substances) Act, 2010. Campbell, ‘Responding to Gun Crime in Ireland’, 414–34.

<sup>154</sup> Nolan, ‘Assassinations and Feuds in Ireland’. Conway and Mulqueen, ‘The 2009 Anti-Gangland Package’..

<sup>155</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>156</sup> Reply to Parliamentary Question No 182 of the 10/09/2020, <https://www.oireachtas.ie/en/debates/question/2020-09-10/182/>

<sup>157</sup> Nolan, ‘Assassinations and Feuds in Ireland’.







national intelligences services collaborated, including to identify and arrest of hitmen before they could engage.<sup>158</sup>

Since the Hutch-Kinahan feud erupted 22 individuals have been sentenced in the Special Criminal Court, 75 threats to life operations have been mounted; €206m drugs, 133 firearms, 5,561 rounds of ammunition and €21.7m in cash have been seized by An Garda Síochána.<sup>159</sup>

### ***The Evolution of Drug Markets in Ireland***

Despite these enforcement activities, including numerous successes in targeting and disrupting OCGs, the drug market in Ireland has grown unabated. The 1970s witnessed a “steadily increased” size in the Dublin drug market.<sup>160</sup> Drug usage reached epidemic proportions by the 1980s in Dublin’s inner city with heroin being a particular problem.<sup>161</sup> Local action groups in the form of “Concerned Parent Against Drugs”, directly challenged dealers through marches and street protests, despairing of a perceived Government inaction.<sup>162</sup> A 2005 study estimated that seizures accounted for 10 per cent of the total yearly amount imported and placed the value of the local market in 2003 at €646m,<sup>163</sup> approximately €850m - €1b in today’s currency.

Official data in 2019 suggests that the Drugs and Organized Crime Bureau (GNDOCB) of An Garda Síochána, “had seized controlled substances with an estimated street value of €167 million in recent years” and €20 million worth in 2019 alone with cash believed to be the proceeds of crime of €2.4 million and 17 firearms”.<sup>164</sup> Despite considerable state investment in treatment, rehabilitation, support and policing the drug market has remained embedded with high levels of use reported despite continued large scale seizures.<sup>165</sup>

Despite, or perhaps in part as a result of, state investment in interdiction and enforcement, a varied cohort of suppliers emerged, with an increasing range of international contacts. OCGs developed an increasingly business-oriented supply chain model of importation and distribution influenced by the scale of profits. Competition among these groups in turn likely precipitated the above series of violent struggles for control of the market.<sup>166</sup>

Regardless of the merits of tackling OCGs, a leading drug user service provider who has worked among Irish drug using populations since 2000 commented,

*Over the past 25 years of intense enforcement, we have more drugs on the street, they’re more potent and there’s more harm, regardless of the best efforts of law enforcement. It’s just gotten worse. It’s almost like the emperor’s new clothes – people talk about seizures and enforcement successes, with little or no acknowledgement that drugs remain as accessible as ever, giving*

<sup>158</sup> Nolan.

<sup>159</sup> Paul Reynolds, ‘Gardaí Dismantling Kinahan Gang, Says Asst Commissioner’, 4 February 2021, <https://www.rte.ie/news/2021/0204/1195109-kinahan-organised-crime-group/>; Jack Nolan interview with Assistant Commissioner J. O’Driscoll, An Garda Síochána, May 2021.

<sup>160</sup> “Report of the Working Party on Drug Abuse”, 1971, Department of Health, Dublin, Ireland, 14.

<sup>161</sup> Paul Quigley, ‘Family and Community Burdens of Addiction: Case-Mix Analysis at a New Community-Based Methadone Treatment Service’, *Drugs: Education, Prevention and Policy* 9, no. 3 (1 January 2002): 221–31, <https://doi.org/10.1080/09687630110116489>; Aileen O’Gorman, ‘Illicit Drug Use in Ireland: An Overview of the Problem and Policy Responses’, *Journal of Drug Issues* 28, no. 1 (1 January 1998): 155–66, <https://doi.org/10.1177/002204269802800109>.

<sup>162</sup> Nolan, ‘Assassinations and Feuds in Ireland’.

<sup>163</sup> Williams, *Badfellas*.

<sup>164</sup> House of Oireachtas 2017 debate, An Taoiseach Mr Leo Varadkar, Wednesday 27<sup>th</sup> November 2019, Vol. 990. No 2.

<sup>165</sup> Marcus Keane et al., ‘Not Criminals: Underpinning a Health-Led Approach to Drug Use’ (London: LSE, 2018), <http://www.lse.ac.uk/united-states/Assets/Documents/IDPU-Not-Criminals-Report.pdf>.

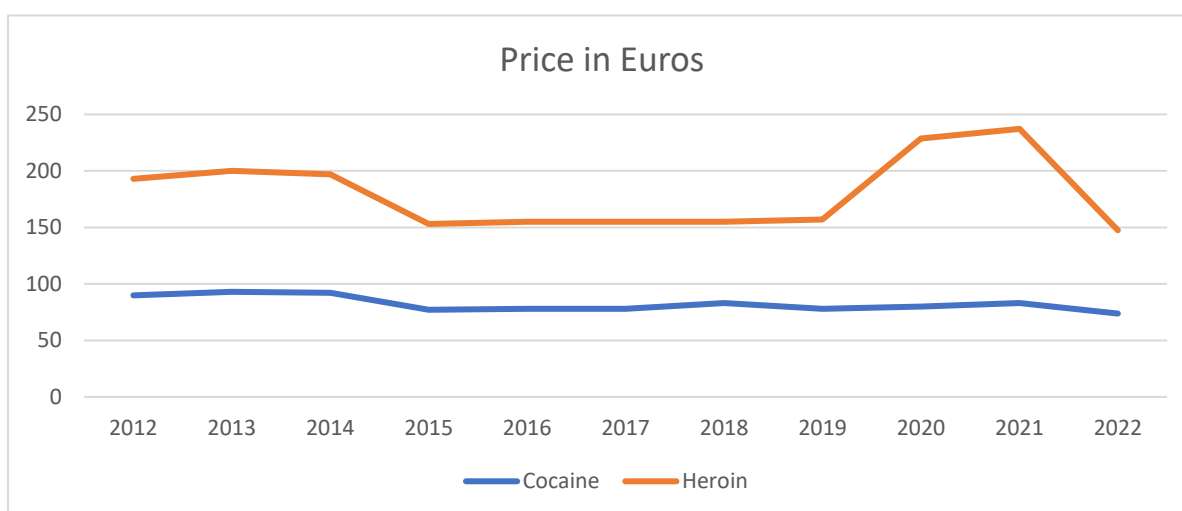
<sup>166</sup> Interview with Jack Nolan.



*the illusion of progress. Many talk about seizures etc. but I never hear anyone saying, over those 25 years, that “we can’t access particular drugs”. It’s ultimately not the efforts of law enforcement that determine the market, it’s the suppliers who decide. Seizures never seem to make any lasting impact on the market that we can see. The state must respond somehow of course, but the task law enforcement has been asked to deliver upon is ultimately impossible.<sup>167</sup>*

## Conclusion

Ireland represents an important case in two regards. It highlights a successful state response to OCG with numerous legislative, policy, strategic and operational successes against OCGs to point to. Simultaneously it highlights the inability of these efforts to arrest or suppress the drug market. The data shown in figure 14 and the consistency of the retail price of heroin and cocaine throughout the last decade.<sup>168</sup> Policing, while hugely important in demonstrating rule of law and undermining perceptions of criminal impunity, has had limited impacts on a key target – the availability of drugs themselves.



**Figure 14:** Cocaine and Heroin retail prices in Ireland from 2012 – 2022 per gram

Nevertheless, Ireland began with a relatively low state capacity – legislative and police – to tackle OCGs and those profiting from the drug trade. Moreover, the relative impunity criminals enjoyed in the 1980s saw the emergence of overt challenges to the state with the murder of police and a journalist in the 1990s. The state’s response demonstrated resolve against these acts and forced many criminals to move overseas to avoid arrest or asset seizure. As such the successful police and state efforts post-1996 led to a reshaping of the criminal underworld in Ireland. The drug market however continued its upward trend and later feuds, beginning in the early 2000s, were perhaps an inevitable outcome of previous enforcement successes. New waves of criminal actors contested the lucrative market, leading to new surges in homicide rates and violence, forcing the state to respond in turn. Over this period, we can point to no examples of police enforcement, despite extensive operational and strategic successes, having any discernible impact on drug supply trends.

<sup>167</sup> Tony Duffin Interview.

<sup>168</sup> Source: <https://dataunodc.un.org/dp-drug-prices-Europe-USA>





## Colombia: Violent Reconfiguration after the FARC dissolution<sup>169</sup>

### Overview

Colombia represents a key case study in the wholesale dismantling of a quasi-monopolistic market actor. The Fuerzas Armadas Revolucionarias de Colombia (FARC) was a Marxist-Leninist guerrilla group in Colombia, active from 1964 to 2017, that engaged in armed conflict and illicit activities to support its goal of overthrowing the government. The group provided significant order, structure, governance, and operational infrastructure for the Colombian cocaine market prior to its dismantling following the signing of the Final Agreement for Ending the Conflict and Building a Stable and Lasting Peace (November 2016).

A key impetus for linking counterinsurgency and counternarcotics programming within Colombia over the past several decades was the ostensible belief that weakening the guerrilla movements would undermine the cocaine market and vice versa.<sup>170</sup> Plan Colombia, a US funded initiative, was a key example of this linkage and a means for the US government to justify formal, albeit limited, intervention in an internal national conflict.<sup>171</sup>

With the dissolution of the FARC seven years ago we now have a large-scale test case for the counterinsurgency and narcotics hypothesis as well as a vital case study on the effects of removing a key hegemonic actor from the illicit drug market. To analyse the outcomes on both we examine the impacts of the FARC's removal at a granular level in three key locations which have traditionally been affected by guerrilla activities and illicit coca cultivation: Cauca, Nariño, and Esmeraldas. The latter is in Ecuador but borders Colombia, which allows an observation on the transnational effects of cocaine market changes within Colombia.

Available data presented shows that the dissolution of the FARC did not provoke a meaningful negative aggregate supply shock in areas it previously controlled. In fact, it is broadly correlated with increased production in these areas. Moreover, the dissolution led to a series of governance shocks which provoked violent confrontation between emergent and splintered groups and the state.

### *The Changing Political Economy of Insurgency and the Coca Economy in Colombia*

The demobilisation of the FARC ended hegemonic guerrilla governance in many of the coca-growing regions, meaning they became effectively unregulated, while formal state presence remained limited. This enabled armed groups who did not sign the Peace Agreement to leverage territorial control and criminal resources formally abandoned by the demobilised guerrillas.<sup>172</sup> Moreover, in areas where control had been negotiated by the FARC with other armed actors, agreements became obsolete,

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<sup>169</sup> This case study draws predominantly on the work of GI-TOC consultant Andrés Felipe Aponte González and the GI-TOC Organized Crime Observatory of the Andean Region.

<sup>170</sup> Daniel Mejia, 'Plan Colombia: An Analysis of Effectiveness and Costs' (Washington, DC: Brookings Institution, 2015), <http://www.brookings.edu/~media/Research/Files/Papers/2015/04/global-drug-policy/Mejia--Colombia-final-2.pdf?la=en>.

<sup>171</sup> John Collins and Karen Torres Alarcón, 'Colombia, the Drug Wars and the Politics of Drug Policy Displacement – from La Violencia to UNGASS 2016', *Journal of Illicit Economies and Development* 3, no. 2 (23 November 2021): 190–205, <https://doi.org/10.31389/jied.93>.

<sup>172</sup> 'Las Caras de Las Disidencias: Cinco Años de Incertidumbre y Evolución' (Fundación Conflict Responses (CORE), 2021), <https://www.conflictresponses.org/las-caras-de-las-disidencias-cinco-anos-de-incertidumbre-y-evolucion/>.



unleashing a new wave of violence driven by shifting power dynamics, uncertainty, and aspiring criminal groups.<sup>173</sup>

The pursuit of territorial control is a key driver of violence and ultimately determines the ability of regional actors to control the coca economy.<sup>174</sup> Earlier counterinsurgency and counternarcotics campaigns aimed at breaking this territorial control within Colombia produced two significant effects:

1. Armed groups, primarily guerrillas, retreated to remote and border areas.<sup>175</sup>
2. These displaced armed groups brought coca crops and the populations linked to this.<sup>176</sup> Consolidation (see Nariño case below) occurred violently, leading to the formation of coca-related clusters encompassing coca crops, laboratory zones, and routes connected to the international cocaine trade.<sup>177</sup>

During and after the peace negotiations dissident groups of the FARC emerged.<sup>178</sup> In particular, after 2016, the centralised organisational structures of the FARC were replaced by federated organisational structures<sup>179</sup> such as:

- **Ejército de Liberación Nacional, (ELN):** a separate guerrilla group to the FARC, which has presence in more than 20 departments in the country and in Venezuelan territory.
- **Estado Mayor Central (EMC):** which emerged during the Havana negotiations, drawing from both former FARC combatants and members of other armed groups, as well as new recruits. The EMC sees itself as the legitimate heir to the FARC's revolutionary goals. More recently it has splintered into two factions.
- **Segunda Marquetalia (SM):** which was formed by FARC members unwilling to transition to civilian life. It incorporates other dissident structures, such as the Comandos de la Frontera and the Coordinadora Guerrillera del Pacífico. It has recently split due to the framework of the "Total Peace" plan.<sup>180</sup>
- Governance forms based on outsourcing criminal services: For example, the **Ejército Gaitanista de Colombia, (EGC).**<sup>181</sup> This group is rebranded from the Autodefensas Gaitanistas de Colombia (AGC) as part of a bid for political recognition under Total Peace. It is the largest and most powerful armed criminal organisation in the country, expanding since 2017 to develop presence in 24 of the country's 32 departments.<sup>182</sup> It operates in both rural and urban

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<sup>173</sup> Andrés Felipe Aponte González and Fernán E. González González, eds., *¿Por Qué Es Tan Difícil Negociar Con El ELN? Las Consecuencias de Un Federalismo Insurgente, 1964-2020* (Bogotá: CINEP, 2021),

[https://www.academia.edu/46246177/\\_Por\\_qu%C3%A9\\_es\\_tan\\_dif%C3%ADcil\\_negociar\\_con\\_el\\_ELN\\_Las\\_consecuencias\\_de\\_un\\_federalismo\\_insurgente\\_1964\\_2020](https://www.academia.edu/46246177/_Por_qu%C3%A9_es_tan_dif%C3%ADcil_negociar_con_el_ELN_Las_consecuencias_de_un_federalismo_insurgente_1964_2020).

<sup>174</sup> 'Las Caras de Las Disidencias: Cinco Años de Incertidumbre y Evolución'.

<sup>175</sup> T. Vásquez, A. R. Vargas, and J. Restrepo, eds., *Una Vieja Guerra En Un Nuevo Contexto: Conflicto y Territorio En El Sur de Colombia* (Bogotá: CINEP, 2011).

<sup>176</sup> Andrés F. Aponte González, 'El campesinado cocalero: más étnico, más grande, más heterogéneo', *La Silla Vacía*, 9 May 2024, <http://www.lasillavacia.com/red-de-expertos/red-rural/el-campesinado-cocalero-mas-etnico-mas-grande-mas-heterogeneo/>.

<sup>177</sup> For example, see: *Ibid.*

<sup>178</sup> 'Las Caras de Las Disidencias: Cinco Años de Incertidumbre y Evolución'.

<sup>179</sup> Francisco Gutiérrez-Sanín, 'The FARC's Militaristic Blueprint', *Small Wars & Insurgencies* 29, no. 4 (4 July 2018): 629–53, <https://doi.org/10.1080/09592318.2018.1497288>.

<sup>180</sup> The Total Peace plan's goal is to negotiate with all illegal armed actors, regardless of their political status (subversive or purely criminal), as a strategy to secure longstanding peace in the country.

<sup>181</sup> Charles Larratt-Smith and Andrés F. Aponte González, 'Entendiendo las dinámicas del tercer ciclo de la guerra en Colombia', *La Silla Vacía*, 3 November 2021, <http://www.lasillavacia.com/red-de-expertos/red-de-la-paz/entendiendo-las-dinamicas-del-tercer-ciclo-de-la-guerra-en-colombia/>.

<sup>182</sup> Max Yuri Gil and German Dario Valencia, 'Así se expande el Ejército Gaitanista de Colombia en Antioquia', *Razón Pública* (blog), 15 September 2024, <https://razonpublica.com/asi-se-expande-ejercito-gaitanista-colombia-antioquia/>.

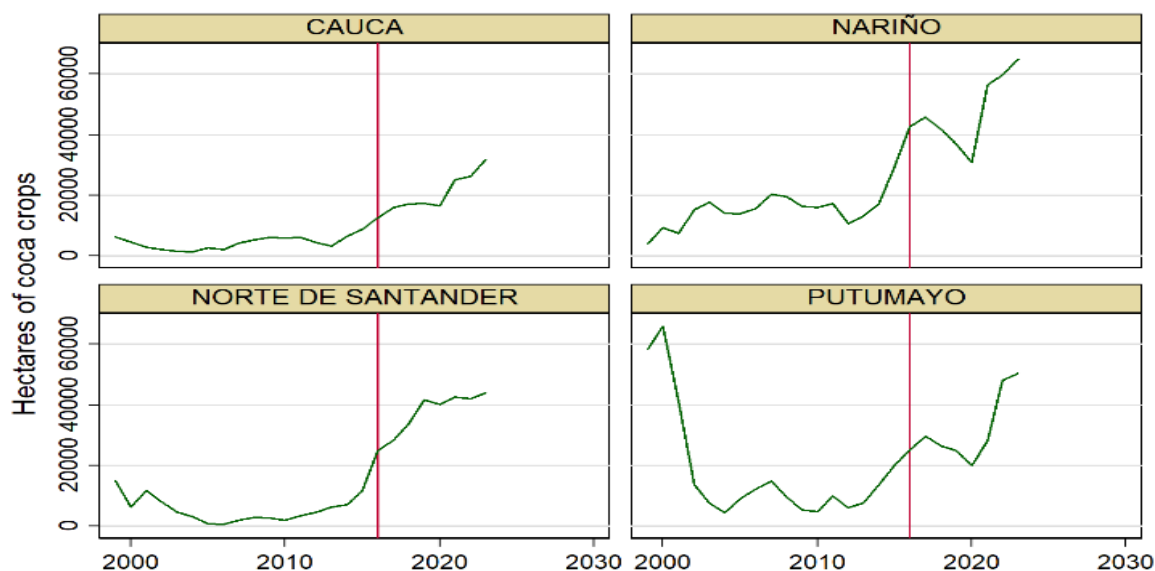


areas through a franchise model, involving collaboration with urban criminal gangs, particularly in Urabá, Bajo Cauca, Antioquia, southern Bolívar, and the Caribbean.<sup>183</sup>

Dissident units developed competition, or occasional cooperation, with other dissidents, criminal groups such as the EGC, and the ELN, depending on:

- capabilities and assets inherited from the “old” war – logistical capabilities, territorial ties, specialised personnel, knowledge of arms trafficking networks, etc.
- the relative balance of power in each territorial dispute.<sup>184</sup>

UNODC data highlights that the dissolution of the FARC did not provoke a negative supply shock in areas it previously controlled. The data from the *Observatorio de Drogas de Colombia, Ministerio da Justicia - Cultivos Ilícitos* presented in figure 15, charts the evolution of coca crops in four Colombian departments before, during and after the FARC’s demobilisation. In all cases there has been an increase in coca crop cultivation after 2016.<sup>185</sup>



Graphs by DEPARTAMENTO

**Figure 15:** Evolution of coca crops in four Colombian departments with heavy baseline presence of FARC (UNODC data). Note: Vertical red lines denote FARC dissolution.

### Open Competition: The Case of Cauca

The department of Cauca has played a pivotal conflict and criminal role in the Colombian coca economy. A series of mountain ranges provide refuge for armed criminal groups, support extensive illicit crop cultivation, and facilitate access to the Pacific Ocean through numerous rivers. These

<sup>183</sup> International Crisis Group, ‘La Incógnita de La “Paz Total”: Qué Hacer Con Los Gaitanistas’, 19 March 2024, <https://www.crisisgroup.org/es/latin-america-caribbean/andes/colombia/105-unsolved-crime-total-peace-dealing-colombias-gaitanistas>.

<sup>184</sup> Larratt-Smith, Charles; Aponte, Andrés & Barrera, Víctor (2022). Más allá de Arauca: crónica de una nueva guerra anunciada. Available: <https://www.lasillavacia.com/red-de-expertos/red-de-la-paz/mas-alla-de-arauca-cronica-de-una-nueva-guerra-anunciada/>; Christia, Fotini. 2012. Alliance Formation in Civil Wars. Cambridge: Cambridge University Press. Charles Larratt-Smith, Andrés Felipe Aponte González, and Victor Barrera, ‘Más allá de Arauca: crónica de una nueva guerra anunciada’, La Silla Vacía, 15 February 2022, <http://www.lasillavacia.com/red-de-expertos/red-de-la-paz/mas-alla-de-arauca-cronica-de-una-nueva-guerra-anunciada/>; Fotini Christia, *Alliance Formation in Civil Wars* (Cambridge University Press, 2012).

<sup>185</sup> Source: <https://www.minjusticia.gov.co/programas-co/ODC/Paginas/Inicio.aspx>.





features render the region of considerable strategic value, resulting in its repeated contestation by the State, armed factions, and criminal organisations.

After years of ELN dominance in the Macizo Caucaño region (2010-2019), particularly in El Tambo and Argelia (Alba, 2021), a dispute erupted between the ELN and the Carlos Patiño Front (CPF), a dissident group of the FARC. The conflict centred on the local coca economy cluster<sup>186</sup> with trade routes that pass through the Micay Canyon to natural ports on the Pacific coast and the Port of Buenaventura, both connected to US-bound Central American drug trafficking routes.<sup>187</sup> Figure 16 shows that homicides have increased rapidly in the region, while political violence (kidnappings, disappearances, massacres) remain on a broad downward trend. This suggests a change in the nature of the conflict<sup>188</sup> – from political conflict to a specifically drug-centric war.

However, the growing radicalisation and militarisation of the ELN in its dealings with the coca-growing and political sectors,<sup>189</sup> vis-à-vis the CPF's increasing military strength and more attractive framework for regulating the market, based on commercial logic rather than socio-political ideology, ultimately tipped the balance in the CPF's favour.<sup>190</sup>

The ceasefires negotiated by the State with armed and criminal actors under the “Total Peace” framework (2022 - present) did little to de-escalate the conflict between the armed criminal groups. The CPF merged with other groups to form the EMC<sup>191</sup>. Meanwhile, limited progress in negotiations with the EMC led to the use of national military forces to gain leverage in the talks. The EMC had also violently targeted environmental and indigenous community leaders,<sup>192</sup> who have opposed the EMC's push for coca cultivation, political control, and recruitment within indigenous communities. With the breakdown of negotiations and the government's confrontational stance, renewed violent conflict between state forces and the CPF remains a major humanitarian risk.<sup>193</sup>

Since 2022, there has been a decline in the homicide rate. This is not because armed groups or the coca economy have disappeared from the area, but instead:

1. The EMC has defeated the ELN and increased its control in the region.<sup>194</sup>
2. Direct confrontations with the State diminished amid the Total Peace dialogues.

<sup>186</sup> Aponte González Interviewee 1, Miembro de la Fuerza Pública del departamento del Cauca, febrero, 2022.

<sup>187</sup> Santiago Rodríguez Álvarez, 'Viaje al Cañón del Micay: donde la negociación con el EMC pende de un hilo', La Silla Vacía, 5 November 2023, <http://www.lasillavacia.com/silla-nacional/viaje-al-canon-del-micay-donde-la-negociacion-con-el-emc-pende-de-un-hilo/>.

<sup>188</sup> Juanita Vélez and Kyle Johnson, 'La guerra en Cauca, a punta de fusiles y de redes', La Silla Vacía, 20 August 2020, <http://www.lasillavacia.com/silla-nacional/la-guerra-en-cauca-a-punta-de-fusiles-y-de-redes/>.

<sup>189</sup> Aponte González Interviewee 2; Cooperación internacional para el departamento del Cauca, febrero, 2022.; 'Encuentran el cuerpo de concejal de Argelia, Cauca, asesinado hace 12 días', El Espectador, 28 January 2021, <https://www.elespectador.com/colombia/mas-regiones/encuentran-el-cuerpo-de-concejal-de-argelia-cauca-asesinado-hace-12-dias-articulo/>.

<sup>190</sup> 'Disidencias de las FARC-EP: dos caminos de una guerra en construcción – Partes 1 y 2' (Bogotá: Fundación Conflict Responses (CORE), 1 March 2024), <https://www.conflictresponses.org/disidencias-de-las-farc-ep-dos-caminos-de-una-guerra-en-construccion-partes-1-y-2/>.

<sup>191</sup> Juan Pablo Calvás, 'Un año de ausencia del Gobierno en El Plateado', El País América Colombia, 14 October 2024, <https://elpais.com/america-colombia/2024-10-14/un-ano-de-ausencia-del-gobierno-en-el-plateado.html>.

<sup>192</sup> Michell Francois Romoleroux, 'Luto en Argelia (Cauca): asesinan con arma de fuego a reconocido líder social y docente', El Tiempo, 10 June 2024, <https://www.eltiempo.com/colombia/otras-ciudades/luto-en-argelia-cauca-asesinan-con-arma-de-fuego-a-reconocido-lider-social-y-docente-3351118>; 'Comunidad denuncia asesinato de líder social y masacre de seis jóvenes en Argelia, Cauca', El Colombiano, 21 March 2022, <https://www.elcolombiano.com/colombia/asesinato-de-richard-betancourt-lider-social-y-masacre-de-jovenes-en-argelia-cauca-FG16980885>.

<sup>193</sup> Valentina Parada Lugo, 'El Plateado, de pueblo poco conocido a símbolo del combate con las disidencias de las FARC', El País, 15 October 2024, <https://elpais.com/america-colombia/2024-10-15/el-plateado-de-pueblo-poco-conocido-a-simbolo-del-combate-con-las-disidencias-de-las-farc.html>.

<sup>194</sup> 'Disidencias de las FARC-EP'.



As such, the “peace” achieved has been by the replacement of the FARC with EMC hegemonic control of the local drug market rather than any reduction in that market or sustained “Total Peace” dividends resulting from the FARC’s removal (Figures 15 and 16<sup>195</sup>).

### Violence and Stabilisation: The Balloon Effect Case of Nariño

The department of Nariño witnessed an eruption of violence following the FARC’s dissolution. FARC structures outside the demobilisation process contested territory and control over coca crops. A key driver of this was the manner in which the FARC established and consolidated its presence in the region. Nariño was largely unaffected by the armed conflict until the development of Plan Colombia in 1999 and Álvaro Uribe Vélez’s Democratic Security policy<sup>196</sup> (2002-2010). Numerous FARC structures from Putumayo and Caquetá, along with coca crops, were displaced into Nariño in the late 1990s<sup>197</sup> to avoid the counterinsurgency and counternarcotics campaigns elsewhere. This example of the ‘balloon effect’, a widely discussed drug policy phenomenon whereby enforcement on one part of the commodity chain merely displaces the problem, created significant tensions among indigenous and Afro-descendant communities.<sup>198</sup>

While the FARC established an effective military hegemony, it failed to translate this into political and social control.<sup>199</sup> The FARC’s attempt to reorient the model of state and society was in direct opposition to local community demands for a stronger and more effective state presence.<sup>200</sup> Furthermore, the FARC drew heavily on young recruits with little political socialisation, as well as incorporating members from urban gangs and criminal organisations (such as Los Rastrojos) which it then subjugated.<sup>201</sup>

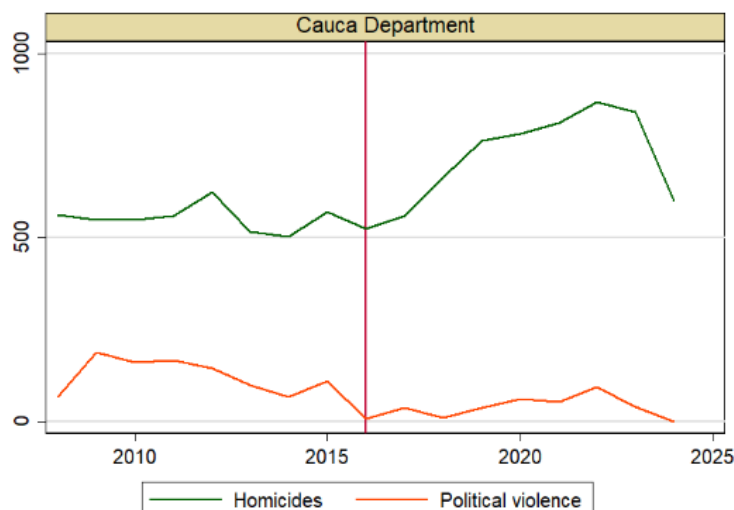


Figure 16: Evolution of homicides and political violence in the Department of Cauca (Data: Colombia Open Gov). Note: vertical red line denotes FARC dissolution.

<sup>195</sup> Political violence: <https://micrositios.centrodememoriahistorica.gov.co/observatorio/download/victimas-acciones-belicas/?wpdmdl=1261&refresh=6720f6e7f15a61730213607>; Homicides: <https://www.datos.gov.co/e3ea1c74-13c7-4bde-97f3-ce8499942410>

<sup>196</sup> The Democratic Security policy was conceived as a comprehensive strategy to fight the guerrillas through the coordinated action of various state institutions, alongside a call to the population (with program such as peasant soldiers) as a central element of the counterinsurgency policy.

<sup>197</sup> José Darío Rodríguez Cuadros, *Génesis, Actores y Dinámicas de La Violencia Política En El Pacífico Nariñense* (Bogotá: CINEP, 2015), <https://cinep.org.co/publicaciones/producto/genesis-actores-y-dinamicas-de-la-violencia-politica-en-el-pacifico-narinense/>; Vásquez, Vargas, and Restrepo, *Una Vieja Guerra En Un Nuevo Contexto: Conflicto y Territorio En El Sur de Colombia*.

<sup>198</sup> Andres Aponte and Javier Benavides, ‘Las Farc y La Organización Comunitaria: El Caso de San Andrés de Tumaco; Los Desafíos Territoriales Ante Una Eventual Implementación de Los Acuerdos de La Habana. En Revista Controversia’ (Bogotá: CINEP, 2016), <https://www.revistacontroversia.com/index.php/controversia/article/view/404>.

<sup>199</sup> Javier Benavides, ‘Transformaciones Del Conflicto Armado y Conflictividades Sociales En San Andrés de Tumaco’ (Bogotá: CINEP-USAID, 2018), <https://cinep.org.co/publicaciones/producto/transformaciones-del-conflicto-tumaco/>.

<sup>200</sup> Aponte and Benavides, ‘Las Farc y La Organización Comunitaria’.

<sup>201</sup> Ibid.



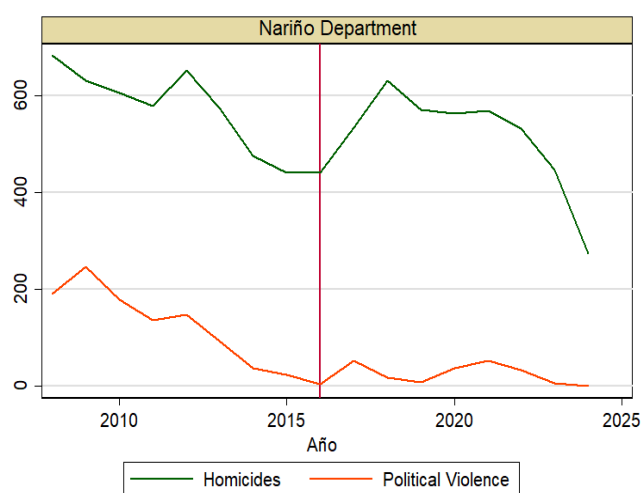


During FARC demobilisation, several factions were not recognised by the command.<sup>202</sup> Additionally, criminalisation of some of its members and the challenging security conditions, led to a violent internal dispute. The FARC fragmented into a large number of small organisations, which, together with the emergence of previously criminalised rearmed factions, clashed over control of populations, territory, and the coca economy.<sup>203</sup>

Eschewing the FARC’s grand socio-political goals, the Frente Oliver Sinisterra (FOS), the Guerrillas Unidas del Pacífico (GUP), and other regionally active structures<sup>204</sup> focused on controlling/regulating the coca economy: restricting movement in drug trafficking corridors and cocaine laboratory zones, setting rules around the trade, minimizing visibility, and preventing intelligence gathering by opponents or the State’s security forces.<sup>205</sup> Meanwhile, these groups utilised and strengthened trafficking routes with criminal gangs in Ecuador, via Esmeraldas province.<sup>206</sup> Ecuadorian nationals also developed key roles within the dissident groups.<sup>207</sup>

These factors make the dissidents’ control in the Tumaco municipality (a key cultivation and trafficking hotspot) particularly unstable and diffuse. It is characterised by armed disputes, alliances, and territorial distribution pacts between the SM, the ELN and the EMC to manage the coca economy.<sup>208</sup> The result is a social anchoring that is quite weak, often coerced, with unclear rules of engagement and significant levels of violence (see Figure 17, below) used to enforce them.<sup>209</sup> This helps explain the considerable assassinations and displacements suffered by unsympathetic indigenous communities in recent years, particularly the Awá.<sup>210</sup>

In the past two years, there has been a dramatic decline in violence in the department (Figure 17).<sup>211</sup> However, this decline is not due to market reduction. Instead, it is because two rearmed factions (Los Contadores and the FOS) formed an



**Figure 17:** Evolution of homicides and political violence in the Department of Nariño (Data: Colombia Open Gov).  
Note: Vertical red line denotes end of FARC

<sup>202</sup> Natalia Arenas, ‘Rendidos en Tumaco: la cara más oscura de las Farc’, La Silla Vacía, 29 March 2017, <http://www.lasillavacia.com/silla-nacional/pacifico/rendidos-en-tumaco-la-cara-mas-oscura-de-las-farc/>.

<sup>203</sup> Verdad Abierta, ‘En Tumaco se disputan el poder que dejan las Farc’, *VerdadAbierta.com* (blog), 18 January 2017, <https://verdadabierta.com/en-tumaco-se-disputan-el-poder-que-dejan-las-farc/>; Arenas, ‘Rendidos en Tumaco’; Lugo, ‘El Plateado, de pueblo poco conocido a símbolo del combate con las disidencias de las FARC’.

<sup>204</sup> Salas Salazar et al., ‘Dinámicas Territoriales de La Violencia y Del Conflicto Armado Antes y Después Del Acuerdo de Paz Con Las FARC-EP: Estudio de Caso: Municipio de Tumaco, Nariño’ (Bogotá: CAPAZ, 2018), <https://www.instituto-capaz.org/wp-content/uploads/2018/11/Capaz-7-baja.pdf>.

<sup>205</sup> Aponte González Interviewee 3 Indigenous leader from Barabacoas Nariño September 2020.

<sup>206</sup> Felipe Botero, ‘Organized Crime Declares War: The Road to Chaos in Ecuador’ (Geneva: The Global Initiative Against Transnational Organized Crime, February 2024), <https://globalinitiative.net/wp-content/uploads/2024/02/Felipe-Botero-Organized-crime-declares-war-The-road-to-chaos-in-Ecuador-GI-TOC-February-2024.pdf>.

<sup>207</sup> Tatiana Duque, ‘La guerra en Tumaco después de Guacho y David sigue igual’, La Silla Vacía, 30 September 2018, <http://www.lasillavacia.com/silla-nacional/pacifico/la-guerra-en-tumaco-despues-de-guacho-y-david-sigue-igual/>.

<sup>208</sup> Larratt-Smith and González, ‘Entendiendo las dinámicas del tercer ciclo de la guerra en Colombia’.

<sup>209</sup> Benavides, ‘Transformaciones Del Conflicto Armado y Conflictividades Sociales En San Andrés de Tumaco’.

<sup>210</sup> David Tarazona, ‘Pueblo awá bajo amenaza en Colombia y Ecuador: “No hay condiciones para vivir en tranquilidad”’, Mongabay, 11 April 2023, <https://es.mongabay.com/2023/04/pueblo-awa-bajo-amenaza-en-colombia-y-ecuador/>; Aponte González Interviewee 4.

<sup>211</sup> Political violence: <https://micrositios.centrodehistoriahistorica.gov.co/observatorio/download/victimas-acciones-belicas/?wpdm=1261&refresh=6720f6e7f15a61730213607>; Homicides: <https://centrodehistoriahistorica.gov.co/>







alliance in 2022, allowing them to subdue the GUP and gain hegemonic control over the areas of greatest military and economic significance, particularly those where coca crops are most concentrated (Tumaco and Barbacoas).<sup>212</sup> Currently, these two groups are part of the Coordinadora Guerrillera del Pacífico, which recently split from the SM along with the Comandos de la Frontera structure.<sup>213</sup> Consequently, the dissolution of the FARC simply led to a reconfiguration of regional drug market governance rather than any impact on market scale.

### ***Esmeraldas (Ecuador): Violent Geographic Diversification***

The Colombia–Ecuador border encompasses the Colombian departments of Nariño and Putumayo, and the Ecuadorian provinces of Carchi, Sucumbíos, and Esmeraldas. Traditionally, patterns of violence in Ecuador, particularly in Esmeraldas, have been linked to those in Colombia.<sup>214</sup> However, in recent years, internal criminal dynamics have played a larger role in Ecuador, fomenting violence and instability as criminal actors have more aggressively challenged the state.<sup>215</sup>

The demobilisation of the FARC in 2016 marked a turning point in these dynamics for two reasons:

1. Dehegemonisation of the coca economy along the border, thereby incentivising new entrants to violently compete for market control.<sup>216</sup>
2. The demobilisation and emergence of dissidents and re-armed actors (see above) led to a surge in violence along the Nariño-Esmeraldas border on the Pacific coast.<sup>217</sup>

Overall, territorial disputes and competition for coca economy profits destabilised the market, reducing the localised supply of coca leaf and base paste (an intermediate paste derived from processing coca leaves and used as a precursor for cocaine production).<sup>218</sup> This disruption within Colombian territory prompted intervention from Brazilian, Mexican and Balkan cartels, which appear to have worked to strengthen Ecuadorian criminal groups to secure the supply of cocaine to Central America and global end-markets.<sup>219</sup> While Colombian groups overwhelmingly remain the main suppliers of coca to Ecuador, some coca cultivation and laboratories were relocated by regional OCGs to Ecuador, likely as a hedge against future uncertainty, becoming more integrated with the country's ports and infrastructure (see Figure 18).<sup>220</sup> This transition predictably, fuelled competition between gangs for territorial control.<sup>221</sup>

The Colombia-Ecuador border dynamic has transformed the global cocaine supply chain, with Ecuador now the world's largest cocaine exporter.<sup>222</sup> In 2022, the UNODC estimated that Ecuador accounted for 33% of cocaine seizures in Europe.<sup>223</sup> Cocaine primarily leaves Colombia and Ecuador through the

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<sup>212</sup> 'Disidencias de las FARC-EP'.

<sup>213</sup> Kyle Johnson et al., 'Total Peace Policy: Between Lights and Shadows' (Serious Organised Crime & Anti-Corruption Evidence Research Programme (SOC ACE), Forthcoming).

<sup>214</sup> Botero, 'Organized Crime Declares War: The Road to Chaos in Ecuador'.

<sup>215</sup> Ibid.; Interview with Felipe Botero, January 2025.

<sup>216</sup> Botero, 'Organized Crime Declares War: The Road to Chaos in Ecuador'.

<sup>217</sup> 'Disidencias de las FARC-EP'.

<sup>218</sup> Ibid.

<sup>219</sup> Interview with Felipe Botero, January 2025.

<sup>220</sup> Interview with Felipe Botero, January 2025; Johnson et al., 'Total Peace Policy: Between Lights and Shadows'. Homicides in Ecuador: [https://www.ecuadorencifras.gob.ec/documentos/web-inec/Tabulados\\_directos/justicia\\_crimen/2024/072024\\_Tabulados%20Seguridad.zip](https://www.ecuadorencifras.gob.ec/documentos/web-inec/Tabulados_directos/justicia_crimen/2024/072024_Tabulados%20Seguridad.zip)

<sup>221</sup> Botero, 'Organized Crime Declares War: The Road to Chaos in Ecuador'.

<sup>222</sup> Ivan Briscoe and Glaeldys Gonzalez Calanche, 'Ecuador's Descent Into Chaos', International Crisis Group, 4 October 2023, <https://www.foreignaffairs.com/south-america/ecuadors-descent-chaos>.

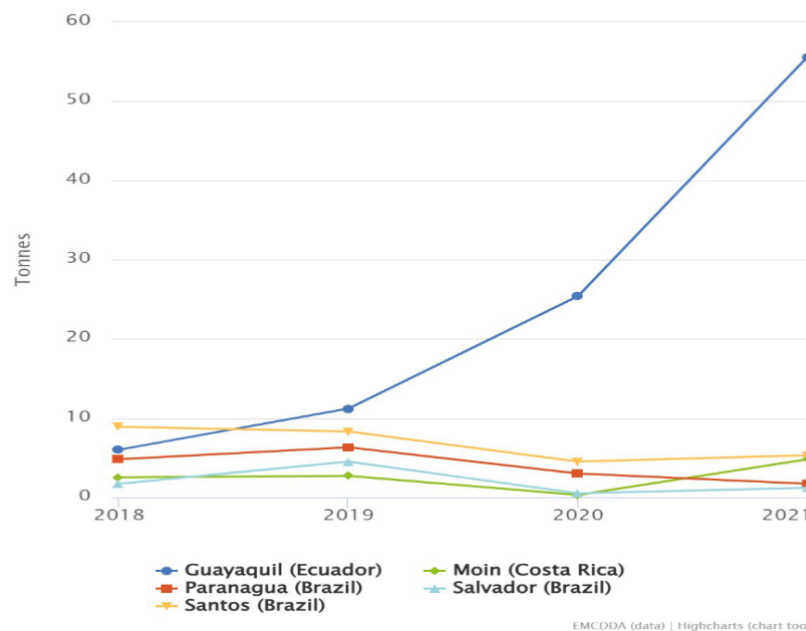
<sup>223</sup> Steven Dudley Acosta Luisa, 'The Cocaine Problem Ecuador's Presidential Candidates Cannot Wish Away', InSight Crime, 28 August 2023, <http://insightcrime.org/news/cocaine-problem-ecuador-candidates-cannot-wish-away/>.



Eastern Pacific route, which accounts for approximately 74% of all cocaine entering North America.<sup>224</sup> Within this changing dynamic Esmeraldas has evolved into a transit hub for drugs originating from Colombia.<sup>225</sup> Criminal groups utilise the border area for shelter and storage of weapons, drugs, and raw materials for drug production. The local population experiences threats, extortion, and constant fear of criminal gangs.<sup>226</sup>

Territorial disputes over cocaine routes such as Esmeraldas have led to a dramatic increase in violence. Ecuador’s homicide rate for 2023 – around 40 intentional homicides per 100,000 people – was the highest in its history, and made the country one of the most violent in Latin America.<sup>227</sup> Forced displacement, local population confinement, disappearances, child and adolescent recruitment, targeted killings of social leaders, attacks with improvised explosive devices, and gender-based violence have all become endemic.<sup>228</sup> Figure 19 highlights the evolution of homicide rates in four cities near the border with Colombia.<sup>229</sup> In 2024 the government claimed a significant reduction in violence, which is reflected in the official homicide rates in Figure 19. However, our sources indicate that this decrease is largely due to changes in the data collection method. Other observatories and think tanks continue to gather data indicating that this downward trend is not as significant as claimed, and they also highlight the collateral effects of security policies: extrajudicial executions of young people, mass incarcerations, and various other forms of harm.<sup>230</sup>

**Top 5 source ports for cocaine seized while smuggled using the rip-on/rip-off method intended for Belgian ports, 2018-2021**



**Figure 18: Top 5 source ports for cocaine seized while smuggled using the rip-on/rip-off method intended for Belgian ports, 2018-2021.**

<sup>224</sup> Organización de Estados Americanos, y Fundación Panamericana para el Desarrollo, ‘Evaluación Situacional: Narcotráfico En Ecuador 2019-2022’, 2023, <https://oeco.pdf.org/wp-content/uploads/2023/07/EVALUACION-SITUACIONAL-NARCOTRAFICO-ECU-2019-2022-.pdf>.

<sup>225</sup> Mar Pichel, ‘Cómo Ecuador pasó de ser país de tránsito a un centro de distribución de la droga en América Latina (y qué papel tienen los carteles mexicanos)’, *BBC News Mundo*, 11 October 2021, <https://www.bbc.com/mundo/noticias-america-latina-58829554>.

<sup>226</sup> Botero, ‘Organized Crime Declares War: The Road to Chaos in Ecuador’.

<sup>227</sup> Mario Alexis Gonzalez, ‘Fusiles, Ametralladoras y Rifles de Nueve Países Circulan Ilegalmente En Ecuador’, *Primicias*, 2 October 2023, <https://www.primicias.ec/noticias/seguridad/armas-ilicitas-ecuador-fabricacion-internacional/>.

<sup>228</sup> ‘Colombia y Ecuador: Crisis a Tener En Cuenta En La Frontera Colombo-Ecuatoriana’ (ACAPS, December 2023), [https://www.acaps.org/fileadmin/Data\\_Product/Additional\\_resources/20231222\\_ACAPS\\_Colombia\\_Analysis\\_Hub\\_Crisis\\_to\\_watch\\_at\\_the\\_Colombia-Ecuador\\_border\\_Spanish.pdf](https://www.acaps.org/fileadmin/Data_Product/Additional_resources/20231222_ACAPS_Colombia_Analysis_Hub_Crisis_to_watch_at_the_Colombia-Ecuador_border_Spanish.pdf).

<sup>230</sup> ‘Esmeraldas reduce un 40% las muertes violentas’, *La Hora*, 8 January 2025, <https://www.lahora.com.ec/esmeraldas/esmeraldas-reduce-un-40-las-muertes-violentas/>; ‘Denuncias de contrabando, tráfico de armas, droga, etc. Ecuador’, *OECD (blog)*, accessed 22 January 2025, <https://oeco.pdf.org/visualizador-de-datos-denuncias-de-delitos-graves/>; Mario Alexis Gonzalaz, ‘Ecuador Cerró 2024 Con La Segunda Peor Tasa de Muertes Violentas de Su Historia, Pese a Una Importante Reducción’, *Primicias*, 10 January 2025, <https://www.primicias.ec/seguridad/ecuador-2024-tasa-muertes-violencias-segunda-peor-historia-87118/>.



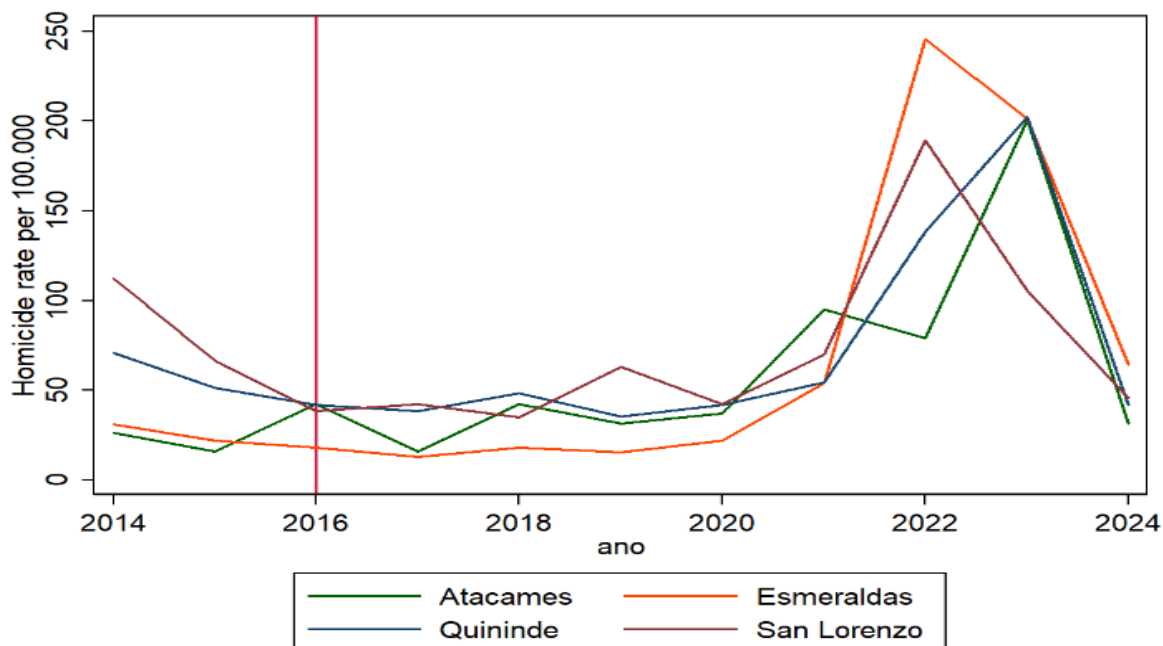


Figure 19: Evolution of homicide rates in the Ecuadorian cities (Cantón) near the border with Colombia, 2014-24.

### Conclusion

Based on this case study we can extrapolate that the FARC's removal created a power vacuum. This brought a short-term spike in violence, followed by an eventual return to some level of equilibrium. In some cases, this has been underpinned by new forms of hegemony. In no cases have we seen a sustained reduction in the market despite the removal of the hegemonic actor. In fact, coca production has actually increased in all cases. As organisational dynamics have changed, the market has continued.

Under the logic of past counternarcotics and counterinsurgency doctrines,<sup>231</sup> the large-scale disruption to criminal governance precipitated by the removal of the FARC should have provoked a demonstrable impact on drug market supply, as well as suppressing instability and criminal dynamics. It has done none of these things. Instead, as aggregate supply trends, criminal political economy dynamics and violence and instability indicators all reveal, it has likely served to fuel the cocaine economy, empower criminal actors who have no anchor or interest in local social orders or stability, and ensure a multi-layered conflict encompassing the state, criminal actors, and local populations.

<sup>231</sup> Collins and Alarcón, 'Colombia, the Drug Wars and the Politics of Drug Policy Displacement – from La Violencia to UNGASS 2016'.



# ‘Entrenched’ Criminal Ecosystems in Cape Town, South Africa: Resilience against Disruption<sup>232</sup>

## Overview

After the end of apartheid South Africa’s borders and markets opened up to the world, ushering in a steady flow of investment, people, and illicit commodities. Among these were drugs that had previously been in short supply in the local market. The criminal ecosystem in the country has proven generally resilient against law enforcement interventions, with minimal disruption to markets following high-profile arrests and noteworthy seizures. While the extent to which interventions succeed likely varies depending on the nature of criminal market (e.g., drugs, extractives, extortion) and the criminal actors involved, for the case study concerned, which involves mafia-style groups, drug markets and associated violence in the City of Cape Town, the illicit economy has proven remarkably resilient to law enforcement interventions.

## The Organised Crime Landscape in Cape Town

The Western Cape province has a long and well-studied history of gangs and gangsterism.<sup>233</sup> Gangs are numerous with a handful being cross-generational.<sup>234</sup> The significance of this longevity is that over time gangs developed structured hierarchies and clear succession of leadership, meaning that the arrest or death of a leader often does not impede gang operations as someone else in the group can step into the leadership role. This reduces the chance of disruption of the gang’s enterprise, meaning that illicit trade associated with it is likely to continue despite the intervention.

Physical control of territory is a key feature of gang operations. Research and mapping from the Global Initiative Against Transnational Organized Crime (GI-TOC), demonstrates how multiple gangs, and the alliances they form, control significant parts of Cape Town to varying degrees.<sup>235</sup> While gangs deal in various illicit markets, the drug trade is one common to most, if not all.<sup>236</sup>

## Drug Markets

The opening up of South Africa’s markets to the world unsurprisingly saw an increase in drugs flowing into the country. The increased supply led to decreased prices throughout the 1990s.<sup>237</sup> These markets, especially in Cape Town, became the main preserve of the established criminal gangs over time.<sup>238</sup>

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<sup>232</sup> This case study draws on the work of Mark Shaw and Michael McClaggan.

<sup>233</sup> Mark Shaw and L.L. Skywalker, ‘The Hammermen: Life and Death as a Gang Hitman in Cape Town’, *Howard Journal of Criminal Justice*, Forthcoming.

<sup>234</sup> Gary Kynoch, From the Ninevites to the Hard Livings gnag: Township gangsters and urban violence in twentieth-century South Africa, *African Studies*, vol.58(1), 1999, <https://www.tandfonline.com/doi/pdf/10.1080/00020189908707905>; Shaun Swinger, Tha Cape’s youth gangs: Bigger, deeper, more dangerous, *Daily Maverick*, 26 May 2014, <https://www.dailymaverick.co.za/article/2014-05-26-the-capes-youth-gangs-bigger-deeper-more-dangerous/>

<sup>235</sup> GI-TOC, Western Cape Gang Monitor issue no.3, September 2024, [https://globalinitiative.net/wp-content/uploads/2024/09/WC-Gang-monitor-No3.FINAL\\_.pdf](https://globalinitiative.net/wp-content/uploads/2024/09/WC-Gang-monitor-No3.FINAL_.pdf)

<sup>236</sup> Don Pinnock, Criminalisation key to Cape Town’s drug wars, University of Cape Town, 30 August 2019, <https://www.news.uct.ac.za/article/-2019-08-30-criminalisation-key-to-cape-towns-drug-wars>; Khalil Goga, The drug trade and governance in Cape Town, Institute for Security Studies, Paper 263, September 2014, <https://issafrica.s3.amazonaws.com/site/uploads/Paper263.pdf>

<sup>237</sup> United Nations Office for Drugs and Crime, South Africa country profile on drugs and crime, October 1999, [https://www.unodc.org/documents/southafrica/sa\\_drug.pdf](https://www.unodc.org/documents/southafrica/sa_drug.pdf)

<sup>238</sup> Don Pinnock, Criminalisation key to Cape Town’s drug wars, University of Cape Town, 30 August 2019, <https://www.news.uct.ac.za/article/-2019-08-30-criminalisation-key-to-cape-towns-drug-wars>

Research focused on Cape Town demonstrated a continuing trend of decreasing drug prices, specifically for heroin, cocaine, and methamphetamine, from 2004-2014.<sup>239</sup> More recent pricing estimates for drugs in 2020, when adjusted for inflation, demonstrate the continued decrease in drug prices compared with previous years when such data was collected.<sup>240</sup> Alongside this, research found an increase in heroin supply and consumption specifically, from the 2000s and throughout the 2010s.<sup>241</sup> An increase in drug-related arrests between 2008-2018 was also observed.<sup>242</sup> After 2018, as visible in Figure 20, seizures reduced drastically in the country.<sup>243</sup>

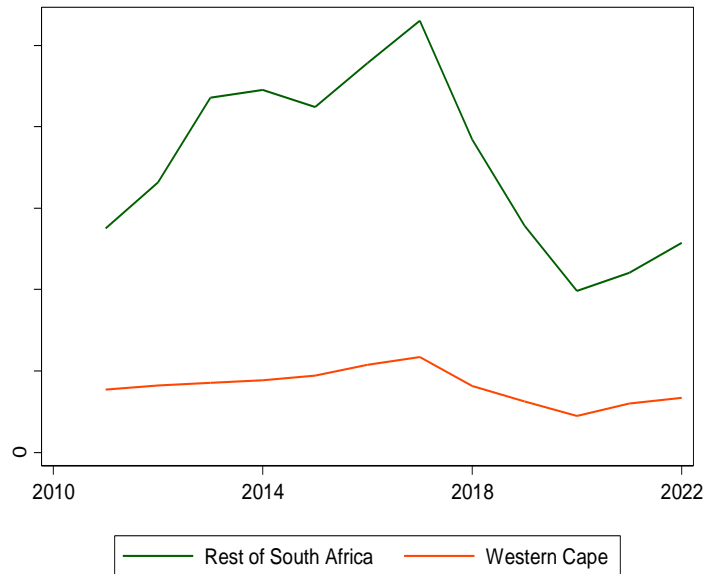


Figure 20: Drug seizures in South Africa, compares rest of the country to Western Cape.

Extrapolating for any of these data points in isolation is problematic. However, by triangulating across them, we can reach a reasonable assumption that drug markets have been steadily expanding, with increased consumption and supply, as well as stable or falling prices,<sup>244</sup> despite continued enforcement efforts.<sup>245</sup> The latter appear ineffective, particularly, from a practical perspective, given the numerous routes into the country, porous borders,<sup>246</sup> corruption at ports,<sup>247</sup> and the plethora of gangs in operation.

The use of violence is essential for control of drug markets where control over physical territory is needed for sales. Where control by a single group is consolidated, less violence is observed in the Western Cape due to less competition and therefore, skirmishes.<sup>248</sup> However, increased territorial

<sup>239</sup> Simon Howell et al., The wrong type of decline: Fluctuations in price and value of illegal substances in Cape Town, SA Crime Quarterly, no.54, December 2015, [https://www.scielo.org.za/scielo.php?script=sci\\_arttext&pid=S1991-38772015000400005](https://www.scielo.org.za/scielo.php?script=sci_arttext&pid=S1991-38772015000400005)

<sup>240</sup> Scheibe et al., Insights into the value of the market for cocaine, heroin and methamphetamine in South Africa, Journal of Illicit Economies and Development, 14 February 2024, [https://eprints.lse.ac.uk/122162/1/Scheibe\\_et\\_al\\_Insights\\_into\\_the\\_value\\_of\\_the\\_market\\_for\\_cocaine\\_heroin\\_and\\_methamphetamine\\_in\\_South\\_Africa\\_published.pdf](https://eprints.lse.ac.uk/122162/1/Scheibe_et_al_Insights_into_the_value_of_the_market_for_cocaine_heroin_and_methamphetamine_in_South_Africa_published.pdf)

<sup>241</sup> Simone Haysom, Hiding in plain sight: Heroin's stealthy takeover of South Africa, ENACT, 11 April 2019, <https://enactafrica.org/research/policy-briefs/hiding-in-plain-sight-heroin-s-stealthy-takeover-of-south-africa>

<sup>242</sup> Don Pinnock, Criminalisation key to Cape Town's drug wars, University of Cape Town, 30 August 2019, <https://www.news.uct.ac.za/article/-2019-08-30-criminalisation-key-to-cape-towns-drug-wars>

<sup>243</sup> Own elaboration based on data from: <https://www.saps.gov.za/services/crimestats.php>

<sup>244</sup> GI-TOC data available at: [https://esa.globalinitiative.net/drugs/country/south\\_africa](https://esa.globalinitiative.net/drugs/country/south_africa)

<sup>245</sup> Jason Eligh, 'A Synthetic Age: The Evolution of Methamphetamine Markets in Eastern and Southern Africa' (Geneva: The Global Initiative Against Transnational Organized Crime, March 2021), 27, <https://globalinitiative.net/wp-content/uploads/2021/03/GITOC-A-Synthetic-Age-The-Evolution-of-Methamphetamine-Markets-in-Eastern-and-Southern-Africa.pdf>.

<sup>246</sup> Jason Eligh, 'A Powder Storm: The Cocaine Markets of East and Southern Africa' (Geneva: The Global Initiative Against Transnational Organized Crime, December 2022), 29-30, <https://globalinitiative.net/wp-content/uploads/2022/12/Jason-Eligh-A-Powder-of-Storm-The-cocaine-markets-of-East-and-southern-Africa-GI-TOC-2022.pdf>.

<sup>247</sup> Global Organized Crime Index, South Africa, [https://ocindex.net/country/south\\_africa](https://ocindex.net/country/south_africa)

<sup>248</sup> Elrena van der Spuy, 'Don Pinnock, Gang Town', *South African Crime Quarterly*, 1 September 2016, 55-59, <https://doi.org/10.17159/2413-3108/2016/v0n57a1365>.





control causes local residents to be susceptible to exploitation by gangs, leaving them with two undesirable alternatives: anarchy on the one hand, and a form of localised authoritarianism (corrosive hegemony), on the other.<sup>249</sup>

The conundrum for interventions is that the arrest of a gang leader could prompt a takeover attempt by another group and a subsequent outbreak of violence, to the detriment of the local public. Therefore, any intervention of this sort must be done with a long-term strategy in mind, or else local communities will endure a period of increased violence only for the status quo to re-establish itself, meaning the period of tumult post-intervention will have ultimately been for nothing. Such outcomes have the effect of eroding trust in law enforcement.

### **Noteworthy Interventions**

Interventions can be both legal and extra-legal. Legal refers typically to police actions, or any means used by the state and within the law. Extra-legal, in this context, refers to vigilantism or intra and inter-gang competition, usually resulting in the murder of gang leaders.

#### The Hard Livings – A case study of multiple interventions

The Hard Livings gang is one of the most enduring in the City of Cape Town and Western Cape province. Among its most famous members are the Staggie brothers, Rashaad and Rashied. Both enjoyed a significant level of celebrity status within South Africa, creating a sense of visible legal impunity around the brothers.<sup>250</sup> During their respective time at the helm of the group's operations, three noteworthy interventions occurred, one legal and two extra-legal.

- 1) In 1996 Rashaad Staggie, the Hard Livings leader at the time, was killed by the vigilante group, People Against Gangsterism and Drugs (PAGAD) in the suburb of Woodstock.<sup>251</sup> Instead of disrupting the gang, the murder galvanised it, enabling the Hard Livings gang to undermine police legitimacy by claiming that the police had not done enough to protect communities, as evidenced by Rashaad's murder.<sup>252</sup> Hard Livings painted Rashaad as a victim of mob violence and the gang as an enterprise working for the greater community.<sup>253</sup> Additionally, succession was assured as Rashied simply took his brother's place.
- 2) Rashied Staggie was arrested in 2003 on charges of kidnapping and gang rape of a girl who had turned state witness against him.<sup>254</sup> Rashied was sentenced to 15 years in prison, and he served 10 before being paroled.<sup>255</sup> However, Rashied's time in prison did not appear to disrupt the gang's enterprises and he continued to control the gang from behind bars.<sup>256</sup> The Hard Livings continued to exist and thrive, maintaining its territory and markets.<sup>257</sup> Rashied continued to lead the gang upon his release. The episode highlights how the incarceration of a single, or small group, of key gang members can fail to significantly hamper the criminal

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<sup>249</sup> Interview with Mark Shaw, December 2024.

<sup>250</sup> Interview with Mark Shaw, December 2024.

<sup>251</sup> South African History Online, Rashaad Staggie shot dead, 4 August 1996, <https://www.sahistory.org.za/dated-event/rashaad-staggie-shot-dead>

<sup>252</sup> Mark Shaw, *Give Us More Guns: How South Africa's Guns Were Armed* (Jonathan Ball Publishers, 2021).

<sup>253</sup> Mary Braid, Gangs take over the drug-flooded Flats of South Africa, *The Independent*, 3 October 1997, <https://www.independent.co.uk/news/gangs-take-over-the-drugflooded-flats-of-south-africa-1233835.html>

<sup>254</sup> News24, Staggie gets 15 years, 7 February 2003, <https://www.news24.com/news24/staggie-gets-15-years-20030207>

<sup>255</sup> Natasha Prince, Staggie goes home on full parole, *IOL*, 18 September 2014, <https://www.iol.co.za/news/staggie-goes-home-on-full-parole-1752849>

<sup>256</sup> GI-TOC field research, including interviews with gang members and community leaders 2019-2020 as well as interviews with gang members in subsequent years.

<sup>257</sup> Rebecca Davis, Rashied Staggie's release: leader of the pack is back on the streets, *Daily maverick*, 23 September 2013, <https://www.dailymaverick.co.za/article/2013-09-23-rashied-staggie-release-leader-of-the-pack-is-back-on-the-streets/>







enterprise when robust structures exist, particularly when prisons serve as an environment which enables gang leaders to continue to exert control.<sup>258</sup>

In 2019 Rashied was assassinated, coincidentally in the same street in which his brother was killed in 1996. Rashied's assassination turned out to be part of a series of hits carried out on 'old order' gangsters who had been around since the 1990s and was suspected to be related to intra-gang rivalries whereby younger members began to usurp older factions within their gangs to claim leadership positions.<sup>259</sup> This appeared to be the case with Rashied and the Hard Livings. What is noteworthy about his killing is that no leadership vacuum and in-fighting occurred immediately after his death. According to sources interviewed, some believed that a takeover of the gang was well-planned prior to the murder,<sup>260</sup> meaning that a quick and seamless transition occurred afterwards. Importantly, the Hard Livings gang once again endured and continues to hold substantial territory and control markets therein. This demonstrates the longevity of a criminal gang in that it can endure even when a long-time leader is removed if it has the aforementioned robust structures.

### Leadership from behind bars – The arrest of Ralph Stanfield

In late 2023, Ralph Stanfield, the leader of the 28s, another old order gang, was arrested and charged with illegal acquisition of firearms licenses. Stanfield has been behind bars during his ongoing trial, which includes various accomplices, his wife among them.<sup>261</sup> However, primary research suggests that while law enforcement sources claim that the arrest led to the waning influence of the 28s gang on the streets, sources on the streets indicate that the 28s' operations have continued as usual.<sup>262</sup>

### **Conclusion**

There is likely no example of a police enforcement operation having any meaningful impact on the drug trade in South Africa. Certainly, there were none that the experts we consulted could point to. The examples and corresponding data above highlight how in the well-established criminal markets of Cape Town, the removal of a leader does not demonstrably impede the operations of established criminal gangs. Where a leader dies, even if suddenly, the gang hierarchy allows for swift succession. Imprisoning a single leader similarly does not notably disrupt the gang as instructions can be relayed to temporary leadership or else the leader continues their operations from within prison. The resilience of larger, long-established gangs ensures that meaningful disruption of their operations requires more than the arrest and prosecution of a single leader. Interventions required intelligence-driven policing that identifies the entire nervous system of a gang and can neutralise each as part of a sweeping operation.

However, the neutralising of one group, even where possible, allows others to step into the void left behind where multiple such groups exist within a defined geographical area.<sup>263</sup> Given the plethora of these groups in the city, their pre-existing competitiveness, and dealing in the same markets (e.g.

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<sup>258</sup> In the case of Brazil, prisons serve as a form of headquarters for criminal gangs such as PCC. These gangs derive much of their control on local markets from the power they exert within the prison system.

<sup>259</sup> GI-TOC, Murder of Cape Town gang leader Rashied Staggie brings an uneasy peace as assassination theories abound, Risk Bulletin #6 March-April 2020, <https://riskbulletins.globalinitiative.net/esa-obs-006/01-murder-of-cape-town-gang-leader-rashied-staggie.html>

<sup>260</sup> GI-TOC, Murder of Cape Town gang leader Rashied Staggie brings an uneasy peace as assassination theories abound, Risk Bulletin #6 March-April 2020, <https://riskbulletins.globalinitiative.net/esa-obs-006/01-murder-of-cape-town-gang-leader-rashied-staggie.html>

<sup>261</sup> Caryn Dolley, Alleged 28s gang boss Ralph Stanfield and his wife arrested in Cape Town crackdown following Ayepyep extortion spat, Daily Maverick, 29 September 2023, <https://www.dailymaverick.co.za/article/2023-09-29-alleged-28s-boss-ralph-stanfield-and-his-wife-arrested-in-cape-town-crackdown/>

<sup>262</sup> GI-TOC, Western Cape Gang Monitor issue no.3, September 2024, [https://globalinitiative.net/wp-content/uploads/2024/09/WC-Gang-monitor-No3.FINAL\\_.pdf](https://globalinitiative.net/wp-content/uploads/2024/09/WC-Gang-monitor-No3.FINAL_.pdf)

<sup>263</sup> Interview with Mark Shaw, December 2024.





drugs), control of both territory and the illicit markets therein are likely to pass to another group in a short space of time, sometimes with an accompanying spate of violence during the takeover.

These difficulties should not deter the investigation and arrest of high-ranking figures in organised crime, as arrest and successful prosecution has profound symbolic value in holding gang members accountable under the law and restoring trust in the state. Moreover, arrests can mitigate against the ability of criminal leaders to establish an unchecked corrosive hegemony within the areas they control as well as their potential to embed within state institutions. This is particularly key where criminals enjoy a celebrity status that operates as a form of public impunity which serves as a visible affront to state authority and legitimacy.<sup>264</sup> At present these core elements are missing and policing is seen as broadly un-strategic and haphazard,<sup>265</sup> attested to by the fact that no major kingpin has been successfully prosecuted for drug offences within South Africa.<sup>266</sup>

However, in isolation, such interventions in settings where organised crime is entrenched, and actors and markets diverse, are unlikely to yield positive outcomes in terms of curtailing drug trade and markets for violence. Controlling or reducing the drug market in South Africa would require, it seems, an entirely different strategy than better police enforcement against drug market suppliers. For example, the recent shift towards a legal framework for cannabis (Dagga) supply holds the possibility of reducing criminal involvement in that market, removing a source of revenue for organised crime, and generating legitimate economic income sources within communities. However, the likelihood of achieving any of these goals remains extremely uncertain in contexts such as South Africa.<sup>267</sup>

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<sup>264</sup> Interview with Mark Shaw, December 2024.

<sup>265</sup> Interview with Julian Rademeyer, December 2024.

<sup>266</sup> Interview with Mark Shaw, December 2024.

<sup>267</sup> Kriegler, 'Cannabis Policy Reform and Organized Crime: A Model and Review for South Africa'.





# Rio de Janeiro, Brazil: The COVID Policing Shock and Drug Market Impacts

## Overview

Aside from the belief that policing will reduce the scale of drug markets, a key argument for drug market enforcement is that it contains expansion of the market itself and limits the violence associated. The example of Rio de Janeiro during COVID-19 provides a test case for this hypothesis. In June 2020, a judge on the Brazilian Federal Supreme Court (STF) ordered a change in the style of police operations in Rio's poor urban areas, limiting militarised operations against traffickers and establishing clearer rules for these operations. Although frequently ignored, drug market policing did change during COVID-19 allowing a unique case study in reduced market enforcement and its impacts on homicides and drug market trends. Evidence suggests that police killings declined significantly, while drug seizures and indicators regarding the scale of the market remained relatively stable. Meanwhile, some police officials suggest that the hiatus enabled a hardening of criminal governance within the poorest urban areas and allowed the expansion of criminal control into utilities and other services within these vulnerable communities.<sup>268</sup> As such, although we have no indications that drug markets expanded or contracted in response to enforcement changes, it appears likely that the underlying criminal governance of Rio did.

## Background

Rio de Janeiro is notable in terms of the scale of territory controlled by armed criminal groups – 20.0% within the city and 18.2% of the broader metropolitan area by 2022, figures double those of 2008.<sup>269</sup> Rio's high levels of urban violence are generally viewed as drug-related, driven by territorial disputes between rival drug trafficking factions which seek to control retail sales in poor neighbourhoods. The situation is aggravated by a highly militarised policing and market intervention strategy operating under an overt "war on drugs" strategy. Those disputes are fought between two kinds of criminal organisations: *facções criminais* (prison gangs) and *milícias groups* (paramilitary groups). While prison gangs have their origins as providers of governance within the penitentiary system – and are thus the by-product of hyper-incarceration driven partly by drug enforcement – paramilitary groups were created and led by police officers who were incentivised by the state to use unsupervised lethal violence against drug traffickers. These criminal groups continue to be led by, or contain, police officers within their ranks.<sup>270</sup>

These conflicts have raged for decades, resulting in thousands of casualties every year, while drug markets have expanded as criminals and militias continue to embed themselves and diversify into other criminal economies. Moreover, the security forces that wage this 'war' are often seen as violent, arbitrary, and corrupt by local populations.<sup>271</sup>

Rio's favelas are informal housing conglomerates situated on Rio's steep mountain slopes. Over time these developed into local drug trade epicentres, especially in the 1970s, when the arrival of cocaine into Rio de Janeiro's drug scene increased profits, bribes, and the calibre of weapons used in the

<sup>268</sup> BR Interviewees 1 & 2, December 2024.

<sup>269</sup> Akemi Nitahara, 'Áreas dominadas por grupos armados no RJ cresceram 131% em 16 anos', Agência Brasil, 13 September 2022, <https://agenciabrasil.ebc.com.br/geral/noticia/2022-09/areas-dominadas-por-grupos-armados-no-rj-cresceram-131-em-16-anos>.

<sup>270</sup> Carolina Cristoph Grillo, 'After the War on Drugs: The Impacts of Cocaine and Cannabis Regulation in Rio de Janeiro', Drug Policy Reform and Organized Crime Series (Geneva: The Global Initiative Against Transnational Organized Crime, October 2024), <https://globalinitiative.net/wp-content/uploads/2024/10/After-the-war-on-drugs-The-impacts-of-cocaine-and-cannabis-regulation-in-Rio-de-Janeiro-Carolina-Christoph-Grillo-GI-TOC-October-2024.pdf>.

<sup>271</sup> Ibid.





conflicts generated by this highly lucrative illegal market.<sup>272</sup> Escalating conflict between drug gangs for access to the wealthy neighbourhoods that bordered favelas culminated in all-out wars during the 1980s and 1990s.<sup>273</sup> Drug gangs organised around the different ‘colours’ of *façções criminais*, such as Comando Vermelho (CV) and Terceiro Comando that organised within prisons and took over drug-selling spots throughout the city by providing mutual support between individual gangs, organising cartels to pay bribes, and purchase guns, ammunition, and drugs wholesale.

Within this context, weak operational and strategic control over the police forces in the state of Rio de Janeiro has become a norm,<sup>274</sup> and the prioritisation of crimes and enforcement strategy has been, for the most part, left to individual precinct bosses or, even more problematically, to individual police officers.<sup>275</sup> This allowed widespread corruption, extortion, and connections between groups of corrupt police officers and politicians<sup>276</sup> which has undoubtedly worsened crime and the negative impacts of drug war policies.<sup>277</sup> *Milícias*, meanwhile, are the main type of criminal group controlling territory in Rio de Janeiro, having grown 400% since 2006, and amounting to 10% of Rio’s entire metropolitan area.<sup>278</sup>

Meanwhile, the neighbouring state of São Paulo faced similar challenges from the 1980s onwards. However, as homicides became endemic in the 1990s, two important changes took place. Criminals organised themselves around a large criminal organisation, the Primeiro Comando da Capital (PCC), that holds the legitimacy and power to mediate criminal conflicts. This ensured that criminals stopped fighting for control of drug trading spots in the city. This cartelisation process in São Paulo has led to an organised bribe payment system to police officers at a standardised rate that is agreed by drug traffickers, so that police officers cannot discriminate in favour of those gangs that pay the most, which severely diminished violence in the city.<sup>279</sup> Simultaneously, the police forces of São Paulo pursued a new strategy involving less militarised activities against drug-selling hotspots in peripheral locations, born from a desire to improve their reputation, which had been seriously damaged by their associations with disappearances, death squads and massacres.<sup>280</sup> São Paulo’s police forces started to focus on establishing better policing protocols and an effective chain of command, fighting property crime and other issues rather than using militarised repression against drug trafficking.<sup>281</sup> The combination of reduced police and gang violence has led to dramatic falls in the levels of homicides within São Paulo and contributed significantly to economic development in the poorest areas of the cities.<sup>282</sup>

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<sup>272</sup> Caco Barcellos, *Abusado - O dono do morro Dona Marta* (Record, 2003), <https://record.com.br/produto/abusado-o-dono-do-morro-dona-marta/>.

<sup>273</sup> Zuenir Ventura, *Cidade partida*, 1ª edição (São Paulo, Brazil: Companhia das Letras, 1994).

<sup>274</sup> Joana Monteiro, Julia Fernandes, and Laura Angélica, *Projeto Farol: Luz Sobre as Promotorias* (Instituto de Educação Roberto Bernardes Barroso (IERBB/MPRJ), 2020).

<sup>275</sup> Bruno Paes Manso and Pedro Inoue, *A república das milícias: Dos esquadrões da morte à era Bolsonaro*, 1ª edição (Todavia, 2020).

<sup>276</sup> ‘Relatório Final Da Comissão Parlamentar de Inquérito Destinada a Investigar a Ação de Milícias No Âmbito Do Estado Do Rio de Janeiro’ (Assembleia Legislativa do Estado do Rio de Janeiro (ALERJ), 2008), <https://static.poder360.com.br/2024/01/relatorio-final-cpi-das-milicias-marcelo-alerj-2008.pdf>.

<sup>277</sup> Manso and Inoue, *A república das milícias*.

<sup>278</sup> Nitahara, ‘Áreas dominadas por grupos armados no RJ cresceram 131% em 16 anos’.

<sup>279</sup> Gabriel Feltran, *Irmãos: Uma história do PCC*, 1ª edição (São Paulo, SP: Companhia das Letras, 2018); Ciro Biderman et al., ‘Pax Monopolista and Crime: The Case of the Emergence of the Primeiro Comando Da Capital in São Paulo’, *Journal of Quantitative Criminology* 35, no. 3 (1 September 2019): 573–605, <https://doi.org/10.1007/s10940-018-9393-x>.

<sup>280</sup> Pantaleão Interview with Police Major.

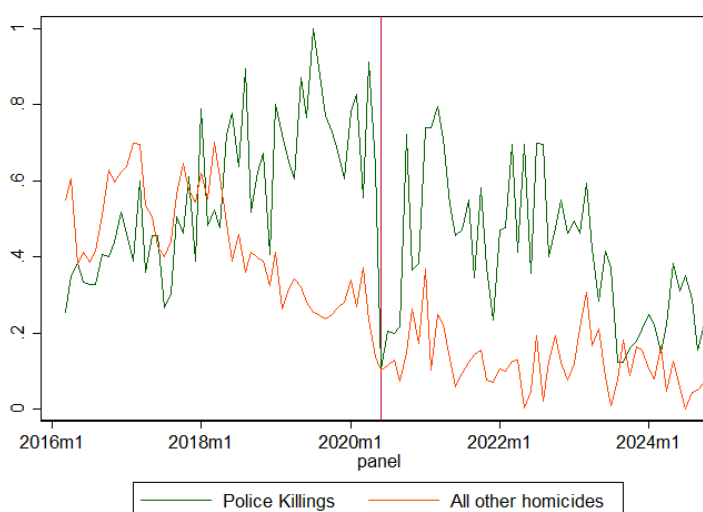
<sup>281</sup> Alan Fernandes, ‘Ordem e Segurança Pública Em São Paulo: Análise Das Estratégias de Policiamento Da Polícia Militar Estadual’ (São Paulo, Escola de Administração de Empresas de São Paulo da Fundação Getúlio Vargas, 2021), <https://repositorio.fgv.br/server/api/core/bitstreams/63cf4bec-e935-430f-946a-7a9eec0f49ad/content>.

<sup>282</sup> Bruno Pantaleão de Oliveira, ‘Descanse o Seu Gatilho: Illegal Markets’ Hegemony and Its Peace Dividends’, 11 December 2023, <https://hdl.handle.net/10438/35014>.

## The COVID-19 Enforcement Shock

In 2020, COVID-19 hit. As the Brazilian government instituted lockdowns and businesses closed, police activities in favelas were unaffected – police officers would enter favelas on a daily basis with the explicit strategic goal of repressing the drug trade, resulting in tens of casualties in some cases.<sup>283</sup> After one incursion which caused 13 casualties and limited the ability of NGOs to deliver water and other essential goods to a favela, an STF judge ruled that police operations in Rio de Janeiro’s favelas were required to inform the prosecutor’s office in advance and provide a clear justification for the operation under established criteria.<sup>284</sup> The court also ordered Rio de Janeiro’s police to wear body cameras, develop a plan to reduce lethality, provide prior notice to schools, hospitals, and clinics about nearby violent police operations, bring ambulances to operations where conflict is expected, and to provide victims’ families with access to the investigations of killings.<sup>285</sup> Although compliance with these orders was far from comprehensive, there was certainly some change in police behaviour. For several months following the order in June 2020 the police were estimated to adhere to these new rules for approximately 50% of operations<sup>286</sup>

Figure 21 shows changes in the rates of police killings and overall homicides.<sup>287</sup> Whilst homicides were falling between 2018 and 2020, police killings were trending upwards. However, following the STF decision (represented by the vertical red line) this trend reversed. A paper by Jessie Trudeau utilises the STF decision to analyse the relationship between police killings and future civilian homicides.<sup>288</sup> Trudeau’s data analysis, drawing upon random discontinuity design (RDD) regression, concludes that the STF decision to restrain police raids immediately led to an estimated 68% decrease in police killings and a 58% decrease in civilian homicides.<sup>289</sup> These effects were most concentrated in police precincts where multiple gangs contest territory and power struggles are more common.<sup>290</sup>



**Figure 21:** Analysis of lethal violence in Rio de Janeiro. Red line denotes the STF decision to limit police incursions in favelas.

<sup>283</sup> Henrique Coelho, ‘Jacarezinho: 1 ano após 28 mortes, 10 de 13 investigações do MP foram arquivadas’, G1, 5 May 2022, <https://g1.globo.com/rj/rio-de-janeiro/noticia/2022/05/05/jacarezinho-1-ano-apos-28-mortes-10-de-13-investigacoes-do-mp-foram-arquivadas.ghtml>.

<sup>284</sup> ADPF 635 MC-TPI / RJ (Supremo Tribunal Federal 2020).

<sup>285</sup> ‘STF julga operações em favelas do Rio enquanto vê jogo duplo de Castro’, Folha de S.Paulo, 13 November 2024, <https://www1.folha.uol.com.br/cotidiano/2024/11/stf-julga-operacoes-em-favelas-do-rio-enquanto-ve-jogo-duplo-de-castro.shtml>.

<sup>286</sup> Raoni Alves, ‘Quase metade das operações policiais em favelas do RJ não cumpriu decisão do STF sobre aviso ao MP, diz UFF’, G1, 24 November 2021, <https://g1.globo.com/rj/rio-de-janeiro/noticia/2021/11/24/estudo-diz-que-457percent-das-operacoes-policiais-em-favelas-do-rj-descumpriram-decisao-do-stf-por-falta-de-comunicacao-ao-mp.ghtml>.

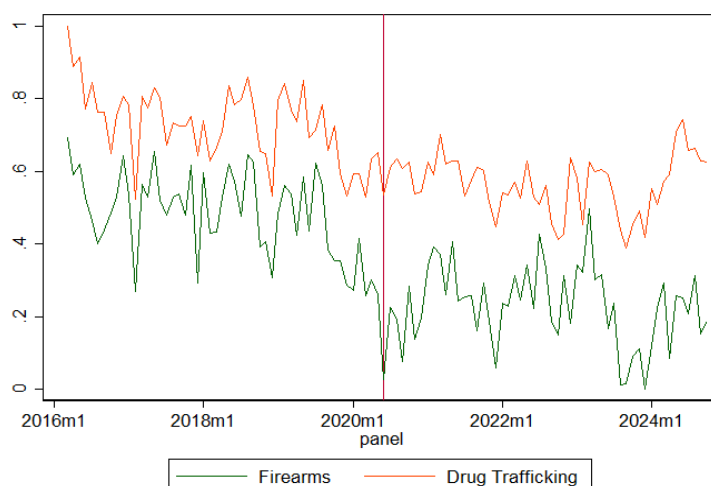
<sup>287</sup> Own elaboration based on data from ISP/Rio de Janeiro state. Note: To analyse this pattern, we standardized the values of all variables where 1 is the maximum value in the trend and zero is the smallest value in the trend. So, for each month, we compute a standardized value that can be interpreted as being XX% of the maximum value in the time trend.

<sup>288</sup> Jessie Trudeau, ‘Limiting Aggressive Policing Can Reduce Police and Civilian Violence’, *World Development* 160 (1 December 2022): 105961, <https://doi.org/10.1016/j.worlddev.2022.105961>.

<sup>289</sup> Ibid.

<sup>290</sup> Ibid.





**Figure 22:** Analysis of drug trafficking and firearms seizures in Rio de Janeiro. Red line denotes the STF decision to limit police incursions in favelas.

Meanwhile, Figure 22 highlights that the use of force and police incursions in Rio de Janeiro is not correlated to the amount of drugs and firearms seizures, thereby calling into question the efficacy of police incursions and lethality.<sup>291</sup>

Among police officers interviewed, there is a recognition that repressive law enforcement is largely ineffective in controlling drug markets in the favelas.<sup>292</sup> They broadly reject critical academic and civil society assertions of racial or class biases as the core underlying motivation for state action.<sup>293</sup> They

instead point to the role of military police operations in attempting to weaken and contain what is effectively an urban “criminal insurgency” and demonstrate state resolve to (re)establish presence in areas in which there has historically been little or none.<sup>294</sup> This “insurgency” is characterised by economic and territorial motives as opposed to political motives.<sup>295</sup> The relative importance of these motives varies by group with prominent criminal groups, particularly CV, adopting a war-like territorial modus operandi, attacking police during operations even when there is limited or no tactical benefit. Part of this derives from a need to demonstrate territorial control to local populations and rival groups. Paramilitaries are seen as adopting a more business-like approach, avoiding needless confrontation and focusing instead on monopolising all service provision and economic dimensions of the areas they seek to control.<sup>296</sup> However, COVID-19 has been seen as precipitating a symbiosis in operating styles between these groups with each learning from the other. CV in particular has increasingly adopted the commercial approach of the paramilitaries, recognising the value of broader economic extraction within areas it controls.<sup>297</sup>

As one senior Federal police official commented (BR Interviewee 1), “there’s a theatre to [enforcement operations] ... The less the police are there, the less these people feel they are part of the formal state. If they have a hope the police will take back these territories, it’s through the interventions.”<sup>298</sup> Interviewee 2, a senior member of Rio police special forces, concurred. He suggested continued police absence resigns the population to existing under and adapting to criminal governance, thereby reinforcing criminal control of these areas.<sup>299</sup> As Interviewee 2 commented,

*If we have less operations, we will have less people die, but people will die for different reasons. For example, one group will encroach on others’ territories and will provoke a firefight between groups. Meanwhile the groups will simply expand their territories if we don’t push back. It’s*

<sup>291</sup> Own elaboration based on data from ISP/Rio de Janeiro state. Note: Same procedures described in Figure 21.

<sup>292</sup> BR Interviewee 1 & 2, December 2024.

<sup>293</sup> BR Interviewee 2, December 2024.

<sup>294</sup> BR Interviewee 1 & 2, December 2024.

<sup>295</sup> Christian Vianna de Azevedo, ‘Criminal Insurgency in Brazil: The Case of Rio de Janeiro’, *Small Wars Journal*, 22 January 2018, <http://smallwarsjournal.com/jrnl/art/criminal-insurgency-in-brazil>.

<sup>296</sup> BR Interviewee 1 & 2, December 2024.

<sup>297</sup> BR Interviewee 2, December 2024.

<sup>298</sup> BR Interviewee 1, December 2024.

<sup>299</sup> BR Interviewee 2, December 2024.





*not war on drugs. It's war to re-control the territory. Stopping their spread. We are not thinking arrest drugs. We are thinking arrest rifles. Drugs are just a business.*<sup>300</sup>

Both interviewees recognised that police operations often have the perverse effect of alienating local populations, causing fatalities and disrupting daily life, particularly as there is generally no follow-up in terms of economic development or reinforced state presence. This often derives from political short termism where elected officials prefer the optics of police operations which they can claim credit for, rather than expensive long-term state building efforts, the expected benefits of which will not be realised until long after their term is completed.<sup>301</sup> Meanwhile, the academic literature has recently highlighted that state building “on the margin”, when the government lacks proper means of coercion, provides decreasing returns on investment which explains, to some extent, why politicians use police force as their main public policies in favelas.<sup>302</sup>

### **Conclusion**

In 2017, the states of Rio de Janeiro and São Paulo together spent US\$1.7 billion to tackle drug markets.<sup>303</sup> Despite this, drug use has remained broadly unchanged, and trafficking has continued unabated.<sup>304</sup> São Paulo represents a very different operating context, one with significantly lower levels of violence owing to PCC monopolisation and police management. In Rio, prison-based gangs, paramilitaries and the police continually fight for control of valuable urban retail drug terrain, and complementary illicit economies such as extortion and various other forms of criminal service provision. In the case of drugs, the overt justification for continued enforcement is based on the principle that police operations suppress drug markets, gangs, and violence. However, the COVID-19 case study provides a clear evidentiary basis to challenge this assumption. Police enforcement declined along with police lethality. Available drug market indicators did not increase over this period, suggesting a limited impact on market supply. However, in terms of criminal governance the enforcement reduction during COVID-19 may have served to exacerbate the embeddedness of criminal gangs.<sup>305</sup>

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<sup>300</sup> BR Interviewee 2, December 2024.

<sup>301</sup> BR Interviewee 1 & 2, December 2024.

<sup>302</sup> Christopher Blattman et al., ‘State-Building on the Margin: An Urban Experiment in Medellín’, SSRN Scholarly Paper (Rochester, NY: Social Science Research Network, 14 June 2022), <https://doi.org/10.2139/ssrn.4024428>.

<sup>303</sup> Francisco Inácio Pinkusfeld Monteiro Bastos et al., ‘III Levantamento Nacional sobre o uso de drogas pela população brasileira’, 2017, <https://www.arca.fiocruz.br/handle/icict/34614>.

<sup>304</sup> Ibid.

<sup>305</sup> BR Interviewee 1, December 2024.





## Mexico: Mérida and the Breakup of the Beltrán-Leyva Cartel

### Overview

Mexico remains an infamous case study in the costs and consequences of attempted drug market enforcement against deeply entrenched interests and power structures. Mexico's President Felipe Calderon (2006-2012) launched a 'war on cartels' mobilising the Mexican military, and a focus on the Kingpin Strategy (KPS). This was founded upon the logic that the cartels had profited from the state's non-confrontational approach to co-opt broad state institutional bases and establish complete criminal governance over large terrains as a form of state-embedded actor. The state therefore hoped to regain control by directly confronting the cartels. This unleashed a structural chaos that shocked even hardened observers of the narcotics trade. This war has received extensive financial support from the United States through the Mérida Initiative, a security cooperation agreement between the United States, Mexico, and Central America aimed at combating drug trafficking, organised crime, and violence through funding, training, and intelligence-sharing.<sup>306</sup>

Broadly, all attempts to decapitate criminal structures within Mexico have been viewed as a strategic failure despite major operational successes. Rather than restoring order, enforcement efforts are widely viewed as having fuelled new levels of disorder and violence.<sup>307</sup> Furthermore, the state's pursuit of a war on cartels has led to criticisms that the implementation of the war on drugs is undermining Mexico's constitutional order from within as the state fundamentally adapts its criminal and political order to tackle an ever evolving threat from drug trafficking organisations.<sup>308</sup> Overall, the lessons from Mexico appear clear: market disruption efforts, typified by a KPS, are perceived to have worsened the situation, hardening and fuelling inter and intra state-cartel violence,<sup>309</sup> with no measurable success in suppressing overall supply trends.<sup>310</sup>

This case study analyses the evolution of the Beltrán-Leyva (BL) Cartel and its eventual demise beginning in 2008, following arrests, conflict, and decapitation. It further examines the broader consequences for local and regional drug markets and associated violence. In particular, it charts the course of events following the high-profile arrest of leader Alfredo BL in 2008, focusing on homicides (as a key regional proxy indicator for instability and violence) both domestically and, more speculatively, regionally. Further, it examines the impact on regional drug flows as well as local drug markets in Mexico. It finds a significant increase in violence and instability directly following Alfredo BL's arrest, with events spiralling into an all-out war, the legacies of which continue to rage today. It suggests that some of the co-terminus violence spikes we chart through Central America may well have been fuelled by Alfredo's arrest and subsequent reconfigurations of criminal actors, although further research is needed on these points. However, the case study broadly affirms generally accepted precepts about drug market interventions, their limited impacts on drug supply and the often detrimental consequences for social stability.

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<sup>306</sup> 'The Merida Initiative', U.S. Embassy & Consulates in Mexico, 8 September 2021, <https://mx.usembassy.gov/the-merida-initiative/>.

<sup>307</sup> Joanne Csete et al., 'Public Health and International Drug Policy', *The Lancet*, 24 March 2016, [http://dx.doi.org/10.1016/S0140-6736\(16\)00619-X](http://dx.doi.org/10.1016/S0140-6736(16)00619-X).

<sup>308</sup> Alejandro Madrazo Lajous, 'The Constitutional Costs of the "War on Drugs"', ed. John Collins, *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*, 2014, <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.

<sup>309</sup> Jason M. Lindo and María Padilla-Romo, 'Kingpin Approaches to Fighting Crime and Community Violence: Evidence from Mexico's Drug War', *Journal of Health Economics* 58 (1 March 2018): 253–68, <https://doi.org/10.1016/j.jhealeco.2018.02.002>.

<sup>310</sup> Gabriela Calderón et al., 'The Beheading of Criminal Organizations and the Dynamics of Violence in Mexico', *Journal of Conflict Resolution*, 1 June 2015, <https://doi.org/10.1177/0022002715587053>.





## *The Political Economy and Context of BL's Rise and Fall*

To a significant extent, Mexico's drug trafficking structures grew up under the coordination of the Institutional Revolutionary Party (PRI), which operated with a virtually unchallenged political monopoly until the 1990s. Under the PRI, cartel operations were loosely managed in ways to minimise political frictions and maximise rents that could be extracted from the trade.<sup>311</sup> The PRI's unrivalled political power served as a check on cartel bosses and traffickers who could never realistically challenge it.<sup>312</sup> This asymmetry between state and criminal actors maintained a broad degree of order within the Mexican drug trafficking market.

With the breakdown of the one-party state in the 1990s the situation changed. The cartels stopped relying on the political protection offered by the PRI and engaged more and more in violence against each other, journalists<sup>313</sup> and politicians. Moreover, cartel members began to branch into different criminal operations such as establishing paramilitary groups focused on waging wars and using extortion to fund those groups, ensuring that internecine warfare became a common *modus operandi*.<sup>314</sup>

The case of the BL Cartel is an archetypal example of these trends. BL was a long-time collaborator with the Sinaloa Cartel, led by the BL brothers, cousins of notorious drug kingpin Joaquín "El Chapo" Guzmán.<sup>315</sup> The BL group gained notoriety and power in the 1990s and early 2000s by fighting and successfully pushing back the rising Gulf Cartel, forming their own hit squad to the Gulf Cartel's hyper-violent wing, Los Zetas. Arturo Beltrán Leyva sat at the top of the BL organisation, directly overseeing the elite hit squad, "Arturo's Special Forces" (FEDA). Building on this success, the BL cartel turned its attention to corruption and political penetration on behalf of the wider Sinaloa Cartel.<sup>316</sup> BL penetrated the highest levels of government, famously infiltrating the Mexican office of Interpol.<sup>317</sup> Disquiet within other cartels at the BL organisation steadily grew in tandem with BL's rising visibility and territorial encroachments.

The cartel began to unravel when one of its key bosses, Alfredo Beltrán Leyva<sup>318</sup>, was arrested on 21<sup>st</sup> of January 2008.<sup>319</sup> He remains imprisoned in the United States.<sup>320</sup> The arrest of Alfredo Beltrán Leyva, youngest brother of Arturo, ultimately upset the market status quo in Sinaloa state and the broader region. The BL organisation, convinced that El Chapo had orchestrated the arrest, split with the wider Sinaloa Cartel. The BL brothers also retaliated against key officials in the Mexican political and security establishment. The feud with El Chapo resulted in a war in Sinaloa, in which the BL group allied itself

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<sup>311</sup> Guillermo Trejo and Sandra Ley, *Votes, Drugs, and Violence: The Political Logic of Criminal Wars in Mexico*, Cambridge Studies in Comparative Politics (Cambridge: Cambridge University Press, 2020), <https://doi.org/10.1017/9781108894807>.

<sup>312</sup> Laura Ross Blume, 'The Old Rules No Longer Apply: Explaining Narco-Assassinations of Mexican Politicians', *Journal of Politics in Latin America* 9, no. 1 (1 April 2017): 59–90, <https://doi.org/10.1177/1866802X1700900103>.

<sup>313</sup> Viridiana Rios, 'Tendencias y Explicaciones Al Asesinato de Periodistas y Alcaldes En México: El Crimen Organizado y La Violencia de Alto Perfil.', *Centro de Investigación y Estudios En Seguridad (CIES), Secretaría de Seguridad Pública, Mexico*, 2022, 1–23.

<sup>314</sup> Trejo and Ley, *Votes, Drugs, and Violence*.

<sup>315</sup> Ioan Grillo, 'Meet the Drug Lords', *Global Post*, 7 April 2009, <https://web.archive.org/web/20121102021503/http://www.globalpost.com/dispatch/mexico/090404/meet-the-drug-lords?page=0,1>.

<sup>316</sup> InSight Crime, 'Beltrán Leyva Organization', InSight Crime, 6 October 2021, <http://insightcrime.org/mexico-organized-crime-news-beltran-leyva-organization-profile/>.

<sup>317</sup> Jacqui Goddard, 'Interpol Agent Passed Information to Beltran Leyva Cartel in Mexico', 28 October 2008, <https://www.thetimes.com/article/interpol-agent-passed-information-to-beltr-n-leyva-cartel-in-mexico-hvn90d6dm8n>.

<sup>318</sup> 'Narcotics Rewards Program: Hector Beltran-Leyva', U.S. Department of State, accessed 22 January 2025, <https://2009-2017.state.gov/j/inl/narc/rewards/133311.htm>.

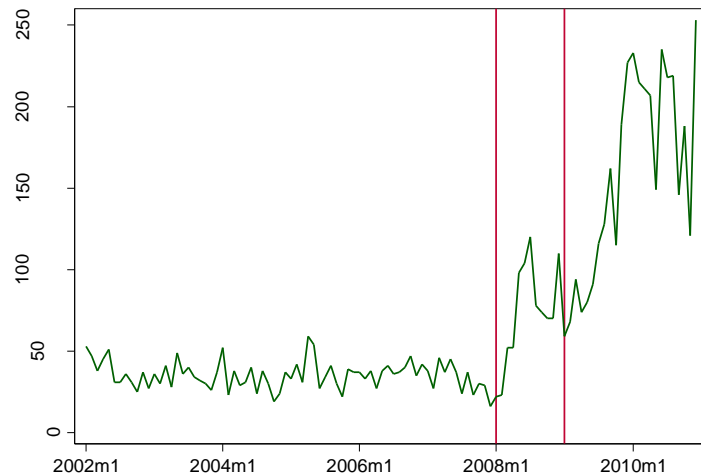
<sup>319</sup> InSight Crime, 'Beltrán Leyva Organization'.

<sup>320</sup> 'Alfredo Beltran Leyva Sentenced to Life in Prison for Leading an International Drug Trafficking Conspiracy', *United States Department of Justice* (blog), 5 April 2017, <https://www.justice.gov/opa/pr/alfredo-beltran-leyva-sentenced-life-prison-leading-international-drug-trafficking-conspiracy>.

with Los Zetas, a paramilitary group. The arrest further spilled out into other regions. As the US Drug Enforcement Administration wrote at the time:

“The residual impact of Alfredo’s arrest not only undermined long-term Sinaloa alliances, but resurrected animosities between rival cartel leadership [El Chapo] and Arturo’s new allies – the Vicente Carrillo-Fuentes Organization (Juarez Cartel) and provided the catalyst behind the bloodshed in Mexico’s most-violent city: Ciudad Juarez”<sup>321</sup>

The war led to an explosion of violence in the region and upended traditional alliances and organisational animosities.<sup>322</sup> El Chapo utilised his extensive connections to bring additional state pressure on the BL cartel.<sup>323</sup> Arturo was killed on 16 December 2009 in a shootout with the Mexican Marines.<sup>324</sup> In both instances of disruption, Alfredo’s arrest and Arturo’s death, the data (see Figure 23) shows spikes in homicides within the State of Sinaloa.<sup>325</sup>



**Figure 23:** Monthly number of homicides in the State of Sinaloa, Mexico. The first red line indicates the capture of Alfredo BL, the second red line indicates the killing of Arturo BL and the capture of Carlos BL (another BL leader) in Sinaloa.

Arturo’s death was particularly impactful since it resulted in a leadership struggle, whereby one member broke away from the BL cartel in 2010 to form a rival group while Arturo’s brother, Hector Beltrán Leyva sought to reconstitute the remnants of the BL cartel under a new name, the South Pacific Cartel. Clashes between these factions further weakened the BL Cartel as arrests of senior members continued and the cartel’s remnants became ever more reliant on Los Zetas. This splintering occurred to such an extent that numerous successor groups emerged with some lineage to the BL Cartel.<sup>326</sup>

### Implications of the Fall of BL

The BL case is a sobering lesson in the complex dynamics of market intervention. The arrest of Alfredo Beltrán Leyva unleashed a chain of events which sparked an explosion of violence within Mexico and likely had transnational implications. His arrest can also be understood within the context of internal cartel power dynamics as the rise of the BL organisation may have threatened established interests in the Sinaloa Cartel. It also highlights the extremely complex paramilitary and alliance dynamics that underpin cartel rivalries, for example the shifting alliances and security arrangements with Los Zetas. Further, the political economy of the cocaine market appeared to favour BL rivals as state suppression of the BL cartel benefitted rival actors. What did not occur during was any sustained disruption to the drugs trade itself (see Figure 24).<sup>327</sup> Moreover, cocaine treatment admissions within Mexico have

<sup>321</sup> ‘Statement of Joseph M. Arabit Special Agent in Charge El Paso Division Drug Enforcement Administration Regarding “Violence Along the Southwest Border”’, 10.

<sup>322</sup> ‘Statement of Joseph M. Arabit Special Agent in Charge El Paso Division Drug Enforcement Administration Regarding “Violence Along the Southwest Border”’.

<sup>323</sup> InSight Crime, ‘Beltrán Leyva Organization’.

<sup>324</sup> <https://archive.ph/20221017212728/https://www.newyorker.com/news/news-desk/killing-arturo-beltrn>

<sup>325</sup> Data from: Lindo and Padilla-Romo, ‘Kingpin Approaches to Fighting Crime and Community Violence’.

<sup>326</sup> InSight Crime, ‘Beltrán Leyva Organization’.

<sup>327</sup> Source: Michael Golz and Daniel J. D’Amico, ‘Market Concentration in the International Drug Trade’, *Journal of Economic Behavior & Organization* 150 (1 June 2018): 28–42, <https://doi.org/10.1016/j.jebo.2018.03.025>.

remained relatively stable, while there has been a significant increase in Amphetamine admissions since 2017 (see Figures 25<sup>328</sup> and 26<sup>329</sup>).

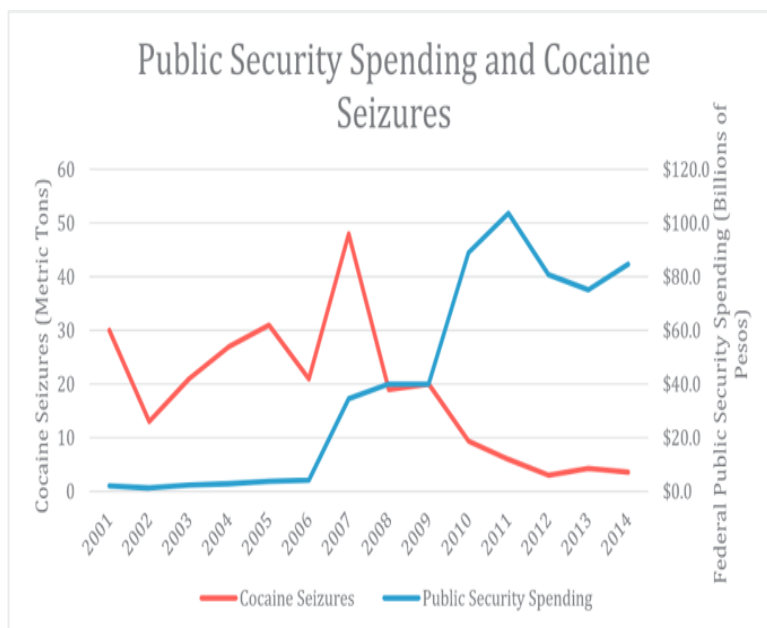


Figure 24: Public Security Spending and Cocaine Seizures.

Mexico’s well-developed academic literature highlights the outcomes of kingpin strategies. Firstly, it provokes in-fighting within drug cartels.<sup>330</sup> Kingpins are political actors that closely liaise with the different sectors of a drug-trafficking operation: paying bribes, regulating armed groups, accessing wholesale drugs suppliers, and so forth. Once cartel bosses are killed or captured, internal controls mechanisms within the cartel are weakened, giving individual lieutenants and mid-level actors a strong incentive to establish their own protection networks, including public officials and armed groups, as well as to leverage previous channels of drug supply and export markets.

Within the extensive literature on this topic, Lindo and Padilla-Romo draw a causal connection between the capture of cartel bosses during the kingpin approach and increased violence within their turf.<sup>331</sup> Without the rules-based order provided by a hegemonic leader or organisational structure, conflicts cannot be resolved, rivalries become existential and all actors compete to utilise the uncertainty to their advancement, or merely to ensure they do not lose out to rivals. Lieutenants war amongst themselves and seek to amass state agents and armed groups as tools of organised violence to compete with rival actors and secure access to drugs and trading routes in an anarchic system.<sup>332</sup>

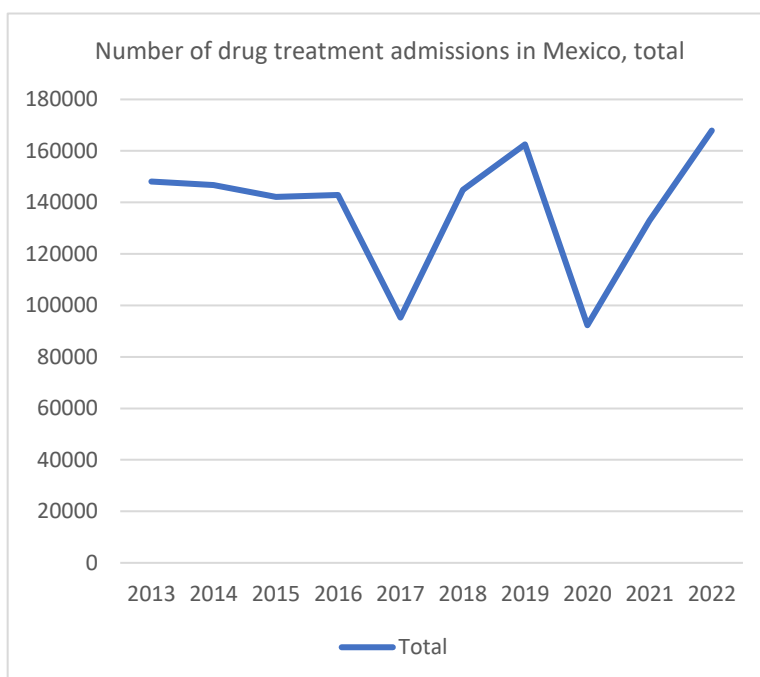


Figure 25: Number of drug treatment admissions in Mexico, total.

<sup>328</sup> Source: [https://www.gob.mx/cms/uploads/attachment/file/835202/Hoja\\_de\\_datos\\_consumo\\_de\\_sustancias\\_2022.pdf](https://www.gob.mx/cms/uploads/attachment/file/835202/Hoja_de_datos_consumo_de_sustancias_2022.pdf)

<sup>329</sup> Source: Ibid.

<sup>330</sup> Lindo and Padilla-Romo, 'Kingpin Approaches to Fighting Crime and Community Violence'.

<sup>331</sup> Ibid.

<sup>332</sup> Collins, *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*.



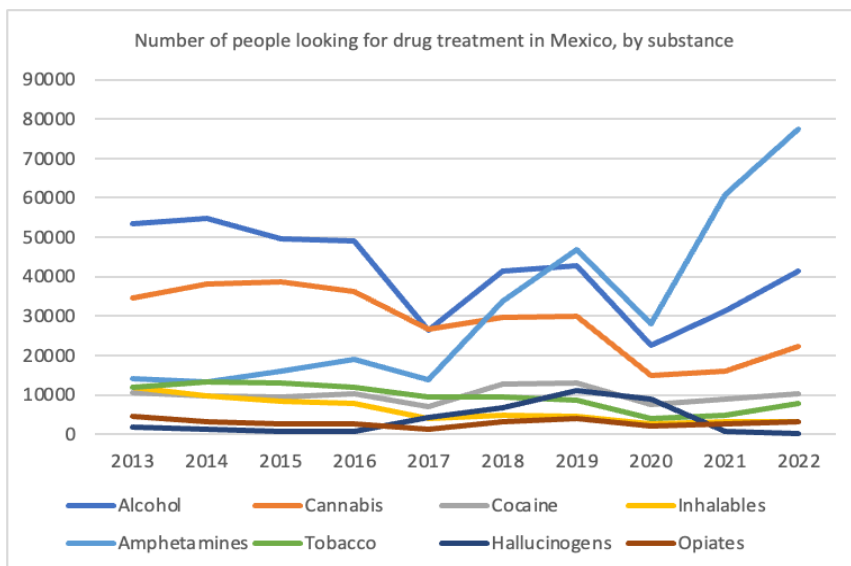


Figure 26: Number of people drug treatment admissions in Mexico, by substance.

Cartel wars are still raging in the state of Sinaloa and in other areas of Mexico’s Pacific coast. After the demise of the heads of Beltran-Leyva family, the Sinaloa cartel reconsolidated under the leadership of El Chapo, who escaped from prison in Mexico in 2015 (from where he was likely still running the cartel). After his re-arrest in 2016, El Chapo was transferred to the US where he is currently incarcerated.

With the removal of the leader, the cartel has once again splintered under the control of different lieutenants who are fighting to control the cannabis and poppy-growing region. After El Chapo’s capture, four of his sons took over the cartel, leading to in-fighting against the old guard, namely “El Mayo” Zambada.<sup>333</sup> On October 17, 2019, an army operation in Culiacán, Sinaloa, arrested El Chapo’s son, Ovidio Guzmán<sup>334</sup> This led to attacks against state forces throughout the city and culminated in Mexican authorities deciding to release the prisoner.<sup>335</sup>

Over time, the group’s internal conflicts have weakened the Sinaloa Cartel’s position as the most powerful cartel in the country, although there is no evidence of less drugs flowing across the border. On the other hand, violence became even more endemic as those groups fought to keep El Chapo’s domain intact. In 2023, Mexican authorities were finally able to capture Ovidio, who allegedly led one of the gangs making up the Sinaloa Cartel and extradite him to the US.<sup>336</sup>

In late 2024, another chapter of in-fighting amongst the Sinaloa groups has led to a massive spread in violence and panic in the state. In July, “El Mayo” and Joaquin Guzmán, another son of “El Chapo”, were arrested in El Paso, Texas, by the United States Government. The arrest was likely made possible by a betrayal within the organisation, while the Mexican government has denied any involvement in taking El Mayo to the US. Since then, the cartel has spiralled into an all-out localised civil war with 500 deaths reported in Sinaloa as of December 2024, four times the previous annual homicide rates, and hundreds more missing.<sup>337</sup> Open-air convoys of armed men, and shootouts in broad daylight are common.<sup>338</sup> As has become typical in drug wars, young men are forced to surrender their phones for inspection by gang members in roadblocks in the outskirts of Culiacán, where having the ‘wrong’

<sup>333</sup> ‘¿Cuánto poder tenía Ovidio Guzmán en el cartel de Sinaloa? (y qué cambia realmente con su captura)’, *BBC News Mundo*, 6 January 2023, <https://www.bbc.com/mundo/noticias-america-latina-64190878>.

<sup>334</sup> *Ibid.*

<sup>335</sup> Redacción, ‘AMLO avaló liberación de Ovidio Guzmán, hijo de El Chapo’, *Text*, Eje Central, 18 October 2019, <https://www.ejecentral.com.mx/amlo-avalo-liberacion-de-ovidio-guzman>.

<sup>336</sup> ‘¿Cuánto poder tenía Ovidio Guzmán en el cartel de Sinaloa?’

<sup>337</sup> Mary Beth Sheridan, ‘How a U.S. Drug Arrest Made Mexico More Violent’, *Washington Post*, 16 November 2024, <https://www.washingtonpost.com/world/2024/11/16/mexico-sinaloa-cartel-power-struggle/>; Thomas Graham, ‘“Mother of All Battles”: Terror for Mexicans as War Rages inside Sinaloa Cartel’, *The Guardian*, 12 December 2024, sec. Global development, <https://www.theguardian.com/global-development/2024/dec/12/mexico-sinaloa-cartel-war>.

<sup>338</sup> John Holman, ‘Civil War in the Home of Mexico’s Sinaloa Cartel: Fear Grips Culiacan’, *Al Jazeera*, 27 September 2024, <https://www.aljazeera.com/features/2024/9/27/civil-war-in-the-home-of-mexicos-sinaloa-cartel-fear-grips-culiacan>.







contacts or pictures in it may lead to a death sentence.<sup>339</sup> The dispatch of the newly formed militarised national guard has been criticised for fuelling more violence in the region. Meanwhile, civilians are affected by school and business closures<sup>340</sup> as well as an increase in car thefts and kidnappings which are common means through which drug cartels fund wars.<sup>341</sup>

### ***Transnational Contagion? The International Spread of Violence***

The violence caused by the war within Sinaloa sparked by the Alfredo BL arrest was almost certainly not limited to Mexico's borders. The war on drugs in Mexico has likely displaced elements of the drugs trade and fuelled a search for alternative trafficking routes. In Figure 27 we include all large countries between Colombia and the United States.<sup>342</sup> A clear increase in homicides can be seen in every state but Colombia following the beginning of President Calderon's drug war in Mexico in 2006. Although some countries have been able to stem the rising violence, others have witnessed persistently high homicide rates. More deprived states such as Belize, Guatemala, El Salvador, and Nicaragua are feeling the aftershocks of the criminal conflicts taking place in Mexico.

By dislocating market dynamics through disruption and violence, US-Mexican enforcement against market actors has unleashed an array of forces which have shattered the previous power distributions within those countries. Gangs in these neighbouring countries are highly reliant on Mexican (and Colombian) groups that own the commodities transported and distributed by locals.<sup>343</sup> Even richer, historically peaceful countries such as Costa Rica, Ecuador and Panama have been engulfed by higher levels of violence since Mexico launched its war on cartels. These states have become safe havens for money laundering and transshipment points for ships and smaller boats carrying US-bound cargo.<sup>344</sup> In Central American countries, violence in drug-trafficking hotspots is about twice the overall level of violence.<sup>345</sup>

While the graphs presented are far from conclusive in making this assessment, market dynamics suggest a displacement effect from Mexico is likely a driver given the interconnected nature of the regional drug market. Similar to a previous displacement effect witnessed from Colombia to Mexico<sup>346</sup> we are possibly observing the transnational impact of US-Mexican market enforcement efforts and the criminal disruption it creates.

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<sup>339</sup> Mark Stevenson, 'In the Heartland of Mexico's Sinaloa Cartel, the Old Ways Have Changed and Violence Rages', AP News, 16 October 2024, <https://apnews.com/article/mexico-sinaloa-cartel-battles-culiacan-b18bbd3abb4ba528444fef3598bdf05a>.

<sup>340</sup> Almudena Barragán, 'Cartel War in Sinaloa Spreads Fear to Other States in Mexico: "You See Fewer People on the Streets and Businesses Close Early"', EL PAÍS English, 24 September 2024, <https://english.elpais.com/international/2024-09-24/cartel-war-in-sinaloa-spreads-fear-to-other-states-in-mexico-you-see-fewer-people-on-the-streets-and-businesses-close-early.html>.

<sup>341</sup> Ibid.

<sup>342</sup> Note: Values are standardized (normalized) such that 1 equals the maximum homicide rate for a given country in a given period and 0 equals the minimum homicide rate for a given country in a given period. Using this standardization methods eases the graphical analysis because it compares countries that have different levels of violence over time. Formally, **Standardized homicide rate = (hom\_rate<sub>it</sub> - min(hom\_rate<sub>i</sub>)) / (max(hom\_rate<sub>i</sub>) - min(hom\_rate<sub>i</sub>))**

<sup>343</sup> Zoe Pearson et al., 'Acknowledging Cocaine Capital in Central American Development', *Journal of Illicit Economies and Development* 4, no. 2 (2 December 2022), <https://doi.org/10.31389/jied.110>.

<sup>344</sup> Ibid.

<sup>345</sup> Gabriel Demombynes, 'Drug Trafficking and Violence in Central America and Beyond' (Washington, DC: World Bank, 2011), <https://documents1.worldbank.org/curated/fr/761351468235453648/pdf/620310WP0Drug00BOX0361475B00PUBLIC0.pdf>.

<sup>346</sup> Daniel Mejia, Pascual Restrepo, and Sandra Roza, 'On the Effects of Enforcement on Illegal Markets: Evidence from A Quasi-Experiment in Colombia', 15 August 2014, <http://ssrn.com/abstract=2480999>; Peter Reuter, 'The Mobility of Drug Trafficking', in *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*, ed. John Collins (London: LSE IDEAS, 2014), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.



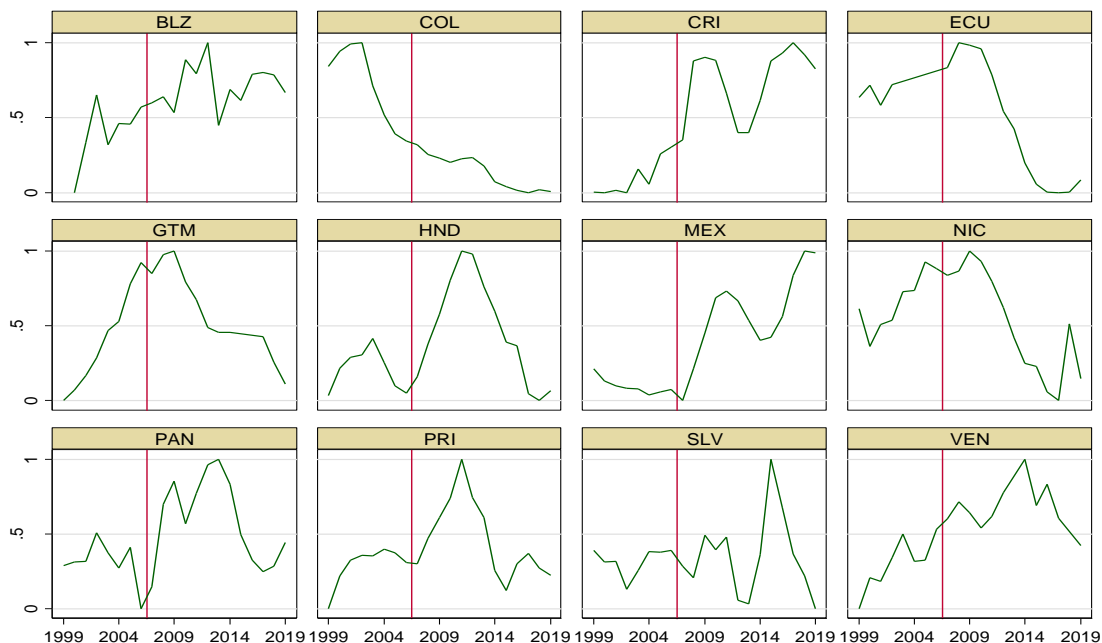


Figure 27: The impact of Mexico War on Cartels (vertical red line) on neighbouring countries.

## Conclusion

The specifics of the BL case echo the general trends witnessed within Mexico over the past five decades. Between FY2008 and FY2017 the US congress allocated USD 2.8 billion to support the war on drugs in Mexico. South of the border, over USD 100 billion was spent on repression by the Mexican government.<sup>347</sup> During this period, over 109,000 people were murdered in Mexico, and 30,000 disappeared<sup>348</sup>. Between 2003 and 2015, the number of yearly homicides in Mexico increased from 10,087 to 20,762 and kidnappings increased from 169 in 2003 to 1160 in 2015 (with a peak of 1888 in 2013).<sup>349</sup>

Despite massive increases in public spending on security and its generally expected dampening effect on crime, these efforts to reduce supply have shown diminishing returns, with cocaine seizures hitting its all-time-high in 2007 and decreasing thereafter(see Figure 24).<sup>350</sup> Although the stated aim of the US government through its Mérida Initiative was to “fight organised crime and associated violence while furthering respect for human rights and the rule of law”,<sup>351</sup> the scholarship on the intervention has repeatedly shown that fighting cartels and focusing on kingpins has disorganised the market and led to an explosion of cartel-related violence in Mexico.<sup>352</sup> Anarchic conditions and resulting cartel violence has created the incentives for more, and better armed protection rackets,<sup>353</sup> further increasing the overall levels of violence in the country.<sup>354</sup>

<sup>347</sup> Clare Ribando Seelke and Kristin Finklea, ‘U.S.-Mexican Security Cooperation: The Mérida Initiative and Beyond (R41349)’ (Washington DC: Congressional Research Service, 2017), <https://crsreports.congress.gov/product/pdf/R/R41349/55>.

<sup>348</sup> Ibid.

<sup>349</sup> Golz and D’Amico, ‘Market Concentration in the International Drug Trade’.

<sup>350</sup> Ibid.

<sup>351</sup> Paul Ashby, ‘NAFTA-Land Security: The Mérida Initiative, Transnational Threats, and U.S. Security Projection in Mexico’ (phd, University of Kent, 2015), <https://kar.kent.ac.uk/48367/>.

<sup>352</sup> Calderón et al., ‘The Beheading of Criminal Organizations and the Dynamics of Violence in Mexico’.

<sup>353</sup> Arindrajit Dube, Oeindrila Dube, and Omar García-Ponce, ‘Cross-Border Spillover: U.S. Gun Laws and Violence in Mexico’, *The American Political Science Review* 107, no. 3 (2013): 397–417.

<sup>354</sup> Fernando A. Chinchilla, ‘A Hard-to- Escape Situation Informal Pacts, Kingpin Strategies, and Collective Violence in Mexico’, *Crime, Law and Social Change* 69, no. 4 (1 June 2018): 533–52, <https://doi.org/10.1007/s10611-017-9763-6>.



## Conclusion

The case studies presented in this report reinforce the argument that policing of mature drug markets has little overall effect on the supply of drugs within those markets. Additional enforcement, while important for other reasons, such as removing corrosive criminal actors, appears to have no clear impact on overall drug availability. Criminal structures are not the market, and the market is not criminal structures.<sup>355</sup> The latter is meeting place of the impersonal forces of supply and demand. The former are the human-made structures which seek to harness, and operate within, the same fundamental market dynamics that underpin all commodity markets, including drugs. Removing criminals, or disrupting criminal structures, temporarily alters the market's operational style but does little to fundamentally impact supply or demand.<sup>356</sup>

Each case study confirms this point in its own context specific way. Sky ECC, while an enormous success from a counter-OC perspective has shown no measurable impact on overall drug market trends in Europe, except for disrupting and displacing certain actors and supply chains. Twenty-four years of enforcement against drug gangs in Ireland, including numerous operational successes by police, have yielded no discernible negative impact on drug supply. The dissolution of the FARC, a hegemonic actor within the Colombian cocaine trade, has not undermined the coca economy and has instead produced an array of spill-over market frictions which have manifest in often highly violent and societally disruptive ways. The Rio de Janeiro counter-example, of reduced enforcement in the Favelas, echoes what police and academics in Brazil have long argued, that drug market enforcement faces an impossible challenge of diminishing or dislodging these embedded criminal economies. The Cape Town case highlights the continuity within criminal organisations and their territorial control. Even with the removal of major actors, the organisations and the market continue with minimal disruption. The BL case echoes the numerous existing critiques of Mexico's "war on drugs". Cartel members come and go, enforcement operations produce short term disruptions, but the market continues, while violence often erupts as cartels reconfigure.

In a number of cases, we find clear evidence that enforcement often serves to worsen underlying violence and societal disruption. These outcomes generally accrue in weaker states, suggesting that enforcement is more problematic and unpredictable in areas with low state capacity and resilience to OCGs. Meanwhile, we find, in each case study, repeated and remarkable resilience among criminal actors and organisations in the face of market disruptions and enforcement. This reiterates a well-articulated policy precept that policing established drug markets can, at best, shape and manage these markets, but cannot realistically hope to meaningfully suppress or dislodge them.<sup>357</sup>

The current global approach to drugs was shaped over a century ago, with broad policy continuity tending towards enforcement and coherence of implementation.<sup>358</sup> The illegality of many of these activities incentivised an extraordinarily large international illicit drug trade, operated by diverse, highly profitable, and often exceedingly ruthless criminal actors.<sup>359</sup> The social and human costs of these wars and the ongoing implementation of repressive drug policies more broadly is incalculable but likely

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<sup>355</sup> Interview with Bryce Pardo, December 2024.

<sup>356</sup> Vanda Felbab-Brown, 'Improving Supply-Side Policies: Smarter Eradication. Interdiction and Alternative Livelihoods - and the Possibility of Licensing', in *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*, ed. John Collins (LSE, 2014), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-DRUGS-REPORT-FINAL-WEB01.pdf>.

<sup>357</sup> Pollack and Reuter, 'Does Tougher Enforcement Make Drugs More Expensive?'; Felbab-Brown, 'Improving Supply-Side Policies: Smarter Eradication. Interdiction and Alternative Livelihoods - and the Possibility of Licensing'.

<sup>358</sup> Collins, *Legalising the Drug Wars*.

<sup>359</sup> John Collins, ed., *Governing the Global Drug Wars* (LSE IDEAS, 2012),

<https://www.lse.ac.uk/ideas/Assets/Documents/reports/LSE-IDEAS-Governing-the-Global-Drug-Wars.pdf>.





immense.<sup>360</sup> Meanwhile, the counterfactual reality, of a world where state suppression efforts had not taken place and certain drug markets not prohibited is also unknowable. Still, there are significant lessons to be learned, particularly as states seek to deviate from existing models and change regulatory structures beyond a default prohibitive approach, as in the case of cannabis legalisation.<sup>361</sup>

None of this is to say that states should not look to enforce laws, target corrosive criminal actors, pursue high-level targets and prevent impunity among groups that, if left to fester and grow, will eventually be in a position of impunity to rot the legal-political fabric of the state.<sup>362</sup> Far from it, governments need to pursue high level targets and ensure criminal governance is kept in check, while demonstrating a complementary commitment to state building, service provision and the protection of health, human rights and security of its citizens. Only through such legitimacy-building activities can governments hope to supplant criminal actors and weaken the corrosive effects of illegal drug markets.<sup>363</sup>

There is a generally accepted trade-off between market hegemony and market violence/disorder.<sup>364</sup> Under a monopolistic or oligopolistic structure, dominant actors can provide some level of stability and contract enforcement within the market – generally through the credible threat, or use, of violence. A state of anarchy under prohibition, becomes a state of criminal order, whereby one actor or group of actors establishes rules of the game whereby conflicts can be minimised, market prices and supply chains can be fixed, external shocks (such as police enforcement) can be minimised, and business returns maximised to the benefit of market participants. For example, the PCC in Brazil is perhaps the greatest example of a criminal enterprise unequivocally dominating São Paulo’s drug and criminal market, establishing strict governance over criminals operating within their urban spaces and bringing a semblance of order for the population living under them.

However, the societal cost-benefit arithmetic of this trade-off changes over time. As hegemonic actors develop, they grow their revenue and territorial base, allowing them to reach tentacles into the formal economy and state structures – corrosive hegemony. Low level corruption of police, customs officials etc. eventually becomes influence at political levels, developing impunity, that can reach all the way to the top of state structures.<sup>365</sup> The PCC, for example, has reportedly amassed enormous financial clout within the Brazilian economic and political sphere.<sup>366</sup> Moreover, it has become a sprawling transnational enterprise with reach throughout the Americas and all the way to the African continent.<sup>367</sup> Should the growth continue, there is a significant risk that state embedded actors challenge the legitimacy of formal Brazilian institutions, as well as those of other, weaker states.<sup>368</sup>

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<sup>360</sup> Collins, *Ending the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy*.

<sup>361</sup> Jonathan P. Caulkins et al., ‘Considering Marijuana Legalization: Insights for Vermont and Other Jurisdictions’ (Santa Monica, CA: RAND, 2015), [https://www.rand.org/pubs/research\\_reports/RR864.html](https://www.rand.org/pubs/research_reports/RR864.html).

<sup>362</sup> Mark Shaw, ‘What Could an Asymmetrical Strategy Against Organised Crime Look Like? A Lesson from the Drug Policy Debate’, *Journal of Illicit Economies and Development* 1, no. 1 (14 January 2019): 99–106, <https://doi.org/10.31389/jied.18>.

<sup>363</sup> M. L. Dispanadda Diskul, John Collins, and Daniel Brombacher, ‘Drugs and Development in the Urban Setting—Expanding Development-Oriented Interventions Beyond Illicit Drug Crop Cultivation’, *Journal of Illicit Economies and Development* 2, no. 2 (23 February 2021): 80–90, <https://doi.org/10.31389/jied.73>.

<sup>364</sup> Gabriel Feltran, ‘(Il)licit Economies in Brazil: An Ethnographic Perspective’, *Journal of Illicit Economies and Development* 1, no. 2 (4 June 2019): 145–54, <https://doi.org/10.31389/jied.28>.

<sup>365</sup> Shaw, ‘What Could an Asymmetrical Strategy Against Organised Crime Look Like?’

<sup>366</sup> BR Interviewee 1, December 2024.

<sup>367</sup> Interview with Julian Rademeyer; Gabriel Feltran, Isabela Pinho Pinho, and Lucia Bird, ‘Atlantic Connections: The PCC and the Brazil–West Africa Cocaine Trade’ (Geneva: The Global Initiative Against Transnational Organized Crime, August 2022), <https://globalinitiative.net/wp-content/uploads/2023/08/Gabriel-Feltran-Isabela-Vianna-Pinho-and-Lucia-Bird-Atlantic-connections-The-PCC-and-the-Brazil%E2%80%93West-Africa-cocaine-trade-GI-TOC-August-2022.pdf>.

<sup>368</sup> BR Interviewee 1, December 2024.



When corrosive hegemony translates into impunity, the implications for the state are significant. This is magnified in cases where figures develop public personas.<sup>369</sup> The South African gang leaders, the Staggie Brothers, developed a celebrity persona within South African society, undermining the credibility of the state.<sup>370</sup> We see similar trends in Rio de Janeiro at present where drug trafficking organisations such as CV increasingly appear to seek militarised confrontations with elite police units in order to demonstrate territorial impunity,<sup>371</sup> representing the de facto existence of “a failed state within a functioning state”.<sup>372</sup> The Veronica Guerin case (see Irish OCGs case study) serves as an important counter-example where the government responded overwhelmingly to a journalist being brazenly murdered. Aggressively targeted enforcement and ongoing fragmentation of the criminal market has at least prevented public perceptions of criminal impunity, even if the drug market continues.

In a number of Latin American countries drugs markets have at times appeared an existential crisis for their governments.<sup>373</sup> In European societies, drug markets remain pervasive and entrenched but far from challenging state authority or extensively embedding themselves within state institutions. Instead, they are confined to marginal social settings, where criminal gangs exert varied degrees of social and territorial control, but under the constant threat of state enforcement or intervention. Far from representing a “war”, as drug prohibition does in many parts of the global south, in the global north drug markets are effectively managed through enforcement.<sup>374</sup> There is no real prospect that these interventions can do more than disrupt and dismantle certain activities and organisations, providing an interim breakdown in governance and, occasionally, supply before new actors and operandi become established.<sup>375</sup> In these conditions the state becomes an external regulator of the market. It operates through indirect mechanisms. Enforcement, arrests, and seizures become the regulatory tools of the state seeking to constrain the social, economic, and territorial impacts of markets it cannot dislodge.

### ***Implications for Policy and Programming***<sup>376</sup>

The current options for drug policy reform discussion can be grouped into five paradigms:

#### ***1. Increase efforts to disrupt drug trafficking networks:***

This paper has already suggested that a reinvigorated “war on drugs” has minimal chance of success and would impose a societal burden few states would be willing to absorb. Moreover, it requires a belief that the balloon can be suppressed in all places at all times. In reality, drug commodity chains inevitably find, and gravitate to, weak points of enforcement or governance. Such gravitation is driven by organisationally-adaptive OCGs circumventing enforcement or governance within a geographic or institutional context. Whether it is a geographically-altered supply chain routing, changes in frequency or flow volume, or the substitution of chemicals to alter drug formulas, too often such responses go unnoticed by criminal justice and law enforcement actors, thereby enabling a continuation of the drug commodity chains. Investment in criminal intelligence measures to improve market surveillance is one approach that can limit the lead time that such adaptive measures go undetected. Further, focusing on the identification of near-real time market characteristics can be achieved through an expanded network of local partners, including people who use drugs and service providers. This network

<sup>369</sup> Interview with Mark Shaw, December 2024.

<sup>370</sup> Interview with Mark Shaw, December 2024.

<sup>371</sup> BR Interviewee 2, December 2024.

<sup>372</sup> BR Interviewee 1, December 2024.

<sup>373</sup> Collins and Alarcón, ‘Colombia, the Drug Wars and the Politics of Drug Policy Displacement – from La Violencia to UNGASS 2016’.

<sup>374</sup> Interview with Jonathan Caulkins, December 2024.

<sup>375</sup> Interview with Mark Shaw, December 2024.

<sup>376</sup> This section benefitted greatly from the inputs of Jason Eligh.





approach goes beyond traditional law enforcement bodies and is a measure that has proven to expand knowledge generation and to contribute to the creation of a more dynamic mapping of, and programmatic response to, drug economies. Among countries of the Global South, such a reorientation of institutional approaches to drug market management would require investment into development of forensic, civil society and judicial capacities.

## **2. Asymmetric enforcement strategies and focussed deterrence:**

There is a solid literature elaborating a more strategic approach to drug market management,<sup>377</sup> but we have precious few examples of it being rigorously implemented. Realistic strategic alignment of drug market goals could allow for a more systematic implementation of this approach. Recognising that the state's role is to shape the operating styles of criminals within these markets, rather than simply seeking to remove all of them would perhaps be a starting point. Asymmetric enforcement is predicated on targeting resources to where they will have the largest impact, rather than symmetrically trying to suppress the entire market. Tangibly, this could be trialled through the implementation of a "targeted enforcement and market disruption initiative". This would involve allocating law enforcement resources toward selectively targeting key actors and areas within illicit drug markets that have the greatest impact on community harm rather than attempting to suppress the entire market indiscriminately. It would include developing intelligence-led policing methods to identify high-impact dealers or trafficking networks whose removal or containment could significantly disrupt market operations and reduce associated violence and societal harm. Additionally, the program should involve partnerships with community organizations to provide alternatives and support for individuals seeking to exit the drug trade, thus aiming to both strategically weaken harmful drug networks and enhance community resilience.

## **3. Expanding public health approaches:**

While this paper has not directly addressed the public health dimensions of drug markets, as it is simply beyond the scope, it is extensively covered elsewhere. Decades of evidence from European public health policies have shown the importance of this key pillar of drug policy, including a vital emphasis on harm reduction.<sup>378</sup> Mitigating the impact of markets overseas requires an invigorated advocacy of these policies by donor governments. Moreover, finding ways to integrate the, too-often, siloed discussions of policing and public health service provision within drug markets is a key part of reforming drug market management.<sup>379</sup> Further, given the extensive evidence base around well implemented decriminalisation and depenalisation, it is desirable that member states continue to find ways to extricate low level actors and drug consumers from market enforcement and criminalisation. Doing so reduces barriers to health services and social wellbeing.<sup>380</sup>

## **4. Mainstreaming drug markets in development policy:**

The paper has also clearly argued, at the outset, and through its case studies for a new discussion and emphasis on the role of state building and socio-economic development within international drug policy design and implementation.<sup>381</sup> Here the focus on metrics and indicators become key.

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<sup>377</sup> 'Use Incentives, Not Brute Force, on the Cartels, Says a Political Scientist', *The Economist*, accessed 16 January 2025, <https://www.economist.com/by-invitation/2024/08/09/use-incentives-not-brute-force-on-the-cartels-says-a-political-scientist>; Felbab-Brown, 'Improving Supply-Side Policies: Smarter Eradication. Interdiction and Alternative Livelihoods - and the Possibility of Licensing'; Shaw, 'What Could an Asymmetrical Strategy Against Organised Crime Look Like?'

<sup>378</sup> Csete et al., 'Public Health and International Drug Policy'.

<sup>379</sup> Interview with Tony Duffin, January 2025.

<sup>380</sup> Alex Stevens et al., 'Depenalization, Diversion and Decriminalization: A Realist Review and Programme Theory of Alternatives to Criminalization for Simple Drug Possession', *European Journal of Criminology* 19, no. 1 (1 January 2022): 29–54, <https://doi.org/10.1177/1477370819887514>.

<sup>381</sup> John Collins et al., 'From Illicit to Value Added: The Lessons of Community and Institutional Change in Northern Thailand's Opium Growing Regions', *LSE Public Policy Review* 1, no. 3 (5 March 2021): 5, <https://doi.org/10.31389/lseppr.18>; Daniel Brombacher and Sarah David, 'From Alternative Development to Development-





Enforcement often operates from a basis of chasing unhelpful, politically motivated, short-termist metrics and indicators, for example seizures, while political officials ignore the underlying state building and socio-economic development initiatives required to fundamentally alter the conditions which allow criminals and drug markets to become embedded in the first place.<sup>382</sup> Mainstreaming drug markets within broader development discussions and programming is a key first step to enabling a more comprehensive approach to tackling the drugs trade in third countries.<sup>383</sup> For example, Thailand's success at transitioning beyond an opium cultivation economy in the north of the country is generally attributed to its comprehensive and sequenced development-first approach, avoiding enforcement, while raising living standards and supporting communities to move beyond a reliance on cultivation. This took decades of investment, state building, political and monarchical leadership, and community engagement to achieve results, but these results have proved lasting.<sup>384</sup>

##### **5. Experimenting with incremental legalisation:**

Lastly, given the many failings of the current approach to drug market management, a growing chorus of prominent international voices argue for a shift to legal regulation of recreational drug markets.<sup>385</sup> We simply do not know what the outcomes of this will be, although we are learning much from the experience of numerous countries legalising cannabis. The current drug regulatory system developed over a century of incremental change and adaptation. This system has been visibly fragmenting since at least 2012. Cannabis legalization, which was initially contested under the terms of the international treaties, has been broadly, if grudgingly, accepted as a reality within it. The question is how the system evolves for the next century to better manage the drug issue. Discussions of localised models of legal regulation will likely become an increasing part of that debate as governments wrestle with the continued intractability of drug markets and the pervasive harm they cause under the current approach.<sup>386</sup> Estimating and measuring the impact of such policy reform measures on managing drug commodity chains, and the mitigation of social harms, is a necessary consideration.

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Oriented Drug Policies', *Drug Policies and Development*, 27 August 2020, 64–78, [https://doi.org/10.1163/9789004440494\\_005](https://doi.org/10.1163/9789004440494_005); Diskul, Collins, and Brombacher, 'Drugs and Development in the Urban Setting—Expanding Development-Oriented Interventions Beyond Illicit Drug Crop Cultivation'.

<sup>382</sup> John Collins, 'Development First: Multilateralism in the Post-'War on Drugs' Era', in *After the Drug Wars: Report of the LSE Expert Group on the Economics of Drug Policy* (London: London School of Economics, 2016), <http://www.lse.ac.uk/IDEAS/publications/reports/pdf/LSE-IDEAS-After-the-Drug-Wars.pdf>.

<sup>383</sup> Diskul, Collins, and Brombacher, 'Drugs and Development in the Urban Setting—Expanding Development-Oriented Interventions Beyond Illicit Drug Crop Cultivation'.

<sup>384</sup> M. L. Dispanadda Diskul et al., 'Development Not Drug Control: The Evolution of Counter Narcotic Efforts in Thailand', *Journal of Illicit Economies and Development* 1, no. 1 (14 January 2019): 80–88, <https://doi.org/10.31389/jied.16>.

<sup>385</sup> The Global Commission on Drug Policy, 'Taking Control: Pathways to Drug Policies That Work' (New York City: GCDDP, 2014).

<sup>386</sup> John Collins, 'Evaluating Trends and Stakeholders in the International Drug Control Regime Complex', *International Journal of Drug Policy* 90 (1 April 2021): 103060, <https://doi.org/10.1016/j.drugpo.2020.103060>.

