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GEOPOLITICAL RISK OBSERVATORY

# Sahel

**Luiss Report**

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**Luiss**

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## GRO Overview: Sahel

*GRO Overviews are neither extensive analysis nor news updates. Instead, they offer a general perspective over areas and issues, trying to provide a series of factors and variables that organizations should monitor to anticipate risks. For in depth analysis or day to day updates you should contact the observatory at [strategicchange@luiss.it](mailto:strategicchange@luiss.it)*



### Summary

The Sahel's geopolitical risk profile is driven by a convergence of military takeovers in Mali, Burkina Faso, and Niger; the formal split from ECOWAS and creation of the Alliance of Sahel States (AES); expanding jihadist insurgencies; and the retrenchment of Western forces alongside the growing role of Russia's state-linked Africa Corps, replacing Wagner. These shifts heighten regional fragmentation, disrupt trade and governance architectures, and intensify cross-border insecurity spreading toward coastal West Africa, increasing exposure for businesses in logistics, extractives, energy, and agrifood value chains.

### Historical and Geopolitical Context

Over the past decade, the central Sahel moved from internationally supported counterinsurgency and development frameworks (e.g., G5 Sahel and various EU/UN missions) into a cycle of coups between 2020 and 2023 that empowered juntas in Mali, Burkina Faso, and Niger amid persistent jihadist pressure. The withdrawal of French, UN, and later US presence, combined with the failure of regional security structures to curb violence, set the stage for the AES formation and a strategic pivot away from traditional partners. In 2023–2025, the three juntas consolidated the AES, upgraded it to a confederation in 2024, and in January 2025 formalized withdrawal from ECOWAS, signaling a political and economic rupture with neighbors. This reconfiguration coexists with escalating attacks from JNIM (al-Qaeda affiliate) and IS Sahel, rising lethality, and tactical shifts including increased use of IEDs, drones, and indirect fire, while violence spreads beyond core Sahel states into Benin, Togo, and other coastal frontiers.

As Western footprints receded, Russia replaced Wagner with the Defense Ministry-controlled Africa Corps, embedding alongside Sahelian forces, securing access agreements, and seeking to protect ruling authorities; this transition reduces Moscow's plausible deniability and raises scrutiny over conduct and resource deals. These dynamics intertwine domestic legitimacy questions, center-periphery grievances, competition over transhumance routes and mining areas, and the rearrangement of regional organizations, collectively reinforcing state fragility. Notably, although a strong anti imperialism rhetoric by its leadership, Burkina Faso has entered an agreement with the US for aids on health infrastructures. If these types of relations persist it could signal that the new equilibrium could still see a relative strong western presence.

### **Global implications**

Supply chains face higher volatility as cross-border insecurity and AES-ECOWAS frictions raise transit risk from landlocked Sahel states to coastal corridors, potentially increasing transport costs, delays, and informal levies that can propagate price pressures. Any sustained disruption along Niger-Benin or Burkina-Ghana-Togo routes could reverberate through agrifood, fuel, and construction inputs, with knock-on effects for regional manufacturing and consumer markets. Any disruption affecting the Gulf of Guinea could also compromise global trade, as the area is crucial for trade in natural resources, including Nigerian oil. In the meanwhile, Nigeria is also facing issue with persistent insecurity across the northeast and Middle Belt and is facing surging separatist violence in the southeast.

Security fragmentation creates avenues for external power competition: Russia's Africa Corps deepens entrenchment while Western and multilateral leverage wanes, potentially reshaping arms flows, training ecosystems, information operations, and critical minerals access strategies. Over time, the regional balance between AES and remaining ECOWAS members could influence voting blocs, diplomatic alignments, and norms in AU and UN fora, with implications for sanctions, peace operations, and financing.

Terrorism spillover toward coastal states risks broader maritime and energy impacts if violence expands to littoral zones or logistics hubs, complicating offshore energy development, port operations, and insurance premiums. Elevated insecurity also raises humanitarian needs and displacement pressures, with secondary effects on European migration politics and donor allocations amid competing global crises.

These trends could see a worsening following the conflict in Iran which has led to a reallocation of resources by the US and its allies, shocks of the oil prices affecting related economies in the area, and increased possibility of terrorism threats as international allies of Iran potentially take part to the counteroffensive against western targets.

### **Practical implications for businesses and interests**

Firms moving goods to or from Mali, Burkina Faso, and Niger face growing uncertainty from checkpoints, episodic closures, and political frictions with ECOWAS neighbors, requiring

contingency routings, larger inventories, and dynamic insurance cover. Contracting cycles may lengthen as authorities rework tariff regimes and cross-border protocols in the wake of AES measures, and as coastal states adjust controls to manage spillover risks. The AES–ECOWAS rupture also raises risk of divergent tariff schedules, currency and payments frictions, and evolving sanctions or restrictions tied to governance or security actors, including Russia-linked entities.

Security perimeters around mines and energy infrastructure may demand greater private security spend, layered with host-nation forces and foreign partners such as Africa Corps, raising compliance, reputational, and human-rights due-diligence exposure. Investor bargaining risks increase as juntas prioritize regime security, resource access, and quick revenue, potentially revising terms, introducing windfall levies, or conditioning permits on security cooperation.

In addition, heightened jihadist activity, targeted attacks on civilians, and shifting tactics elevate kidnap-for-ransom, roadside IED, and complex attack risks for staff and contractors, especially on peri-urban approaches and rural corridors. Duty-of-care frameworks, movement protocols, and crisis communications should be recalibrated to account for rapidly changing frontlines and the spread of violence into previously lower-risk border districts in coastal neighbors.

### **What to monitor**

To effectively navigate this complex environment, the following indicators should be continuously monitored for signs of escalation or change:

- AES–ECOWAS negotiations, tariff moves, and any partial reintegration steps or new trade barriers affecting cross-border flows.
- Trajectory of JNIM and IS Sahel operations, including attack rates, geographic spread toward littorals, and tactic shifts (IEDs, drones).
- Foreign security presence: scale, basing, and mandates of Russia’s Africa Corps and any parallel drawdowns or re-entries by Western actors.
- Governance transitions and timelines in Mali, Burkina Faso, and Niger, including constitutional changes, elections, and civil-military dynamics.
- Corridor integrity for Niger–Benin, Burkina–Ghana–Togo, and Mali–Côte d’Ivoire routes, including closures, attacks, and insurance pricing.
- Policy shifts by AU and ECOWAS (e.g., standby force activation, sanctions relief or tightening) and coastal states’ border security posture.
- Human-rights and compliance signals linked to joint operations and security contractors, affecting ESG, sanctions exposure, and license to operate.

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