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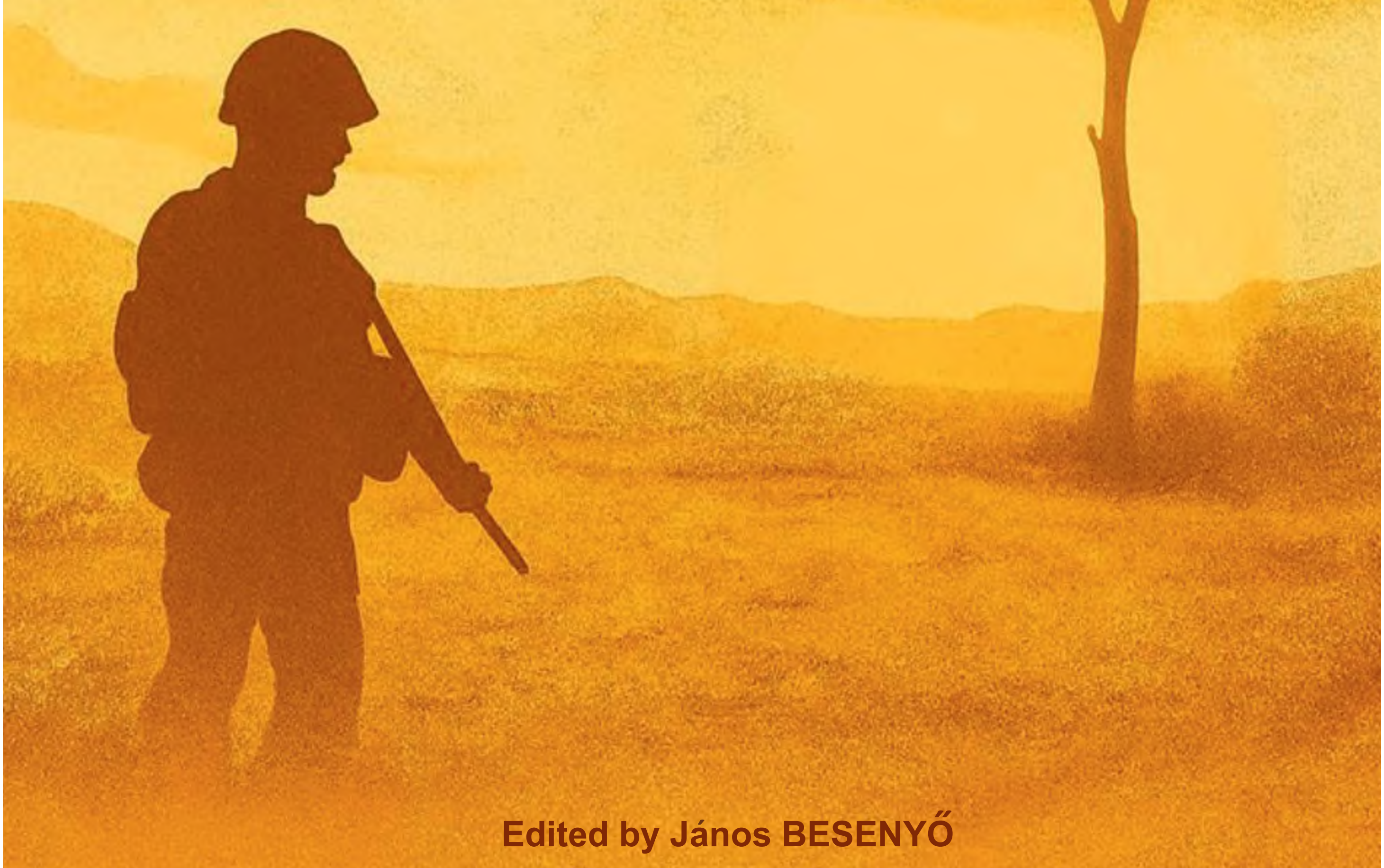
NATO'S REGIONAL CHALLENGES

TERRORISM AND COUNTER-TERRORISM IN SAHEL



Edited by János BESENYŐ

Centre of Excellence Defence Against Terrorism
Ankara, Türkiye, 2025

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IN SAHEL

János BESENYŐ
Editor

NATO COE-DAT
Research Project

Centre of Excellence - Defence Against Terrorism
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NATO'S REGIONAL CHALLENGES: TERRORISM AND COUNTER-TERRORISM IN SAHEL

Besenyő, János (ed.) 2025

NATO's Regional Challenges: Terrorism and Counter-Terrorism in Sahel – NATO COE-DAT / Research Project by János Besenyő (ed.)

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First Edition, Ankara, December 2025

Published by

Centre of Excellence Defence Against Terrorism (COE-DAT)
Publisher Certificate Number: 47344
Address : Devlet Mahallesi İnönü Bulvarı Kirazlıdere Caddesi No:65 Çankaya 06582 Ankara - TÜRKİYE P.O. Box Address : P.K.-57 06582
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Printed by Başkent Klişe Matbaacılık
Bayındır 2. Sk. No: 30/1 06420 Çankaya/Ankara (0312) 431 54 90 Certificate Number: 51026

486 pages;
ISBN: 978-975-409-784-9
1. Africa 2. Sahel 3. Counter Terrorism.

To cite this book: János Besenyő (ed.) 2025, NATO's Regional Challenges: Terrorism and Counter-Terrorism in Sahel – NATO COE-DAT Research Project - Ankara: Centre of Excellence Defence Against Terrorism

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Economy of the Sahel: Challenges, Opportunities, and Geopolitical Tensions

Keywords: *Sahel, Africa, China, Economy, geopolitics, USA, France, Climate Change.*

Introduction

The Sahel region of Africa, sandwiched between the Sahara and the Savannah, is a vast, semi-arid region that forms a transitional zone stretching approximately 5,000 kilometres from Senegal on the Atlantic coast to Eritrea on the Red Sea coast. This expansive area encompasses diverse geographic and agroecological systems, spanning 14 countries and providing a home for roughly 400 million people. This region is settled by desert-dwelling peoples from the Sahara in the north who migrated to the bordering areas of the south in search of more favourable living conditions. Even though the Sahel is characterised by diverse cultures, historical significance, and varying levels of accessibility and stability, the region is among the world's least developed areas. The Sahel Human Development Report, 2023, published under the auspices of the United Nations Development Program (UNDP), highlights that the region's economic affairs are intricately tied to energy access, climate challenges, and regional disparities (UNDP, 2024).

This chapter examines the complex economic landscape of the Sahel region, exploring the environmental challenges, political instability, and external influences that shape the economic realities of each country within the region. Ten major mainland countries are taken into account, as defined by the United Nations Integrated Strategy for the Sahel (UNISS): Senegal, Gambia, Mauritania, Guinea, Mali, Burkina Faso, Niger, Chad, Cameroon, and Nigeria. Analysing the current economic status of these countries and broader regional dynamics is imperative in identifying critical factors impacting the economic conditions and suggesting strategic interventions to enhance economic resilience and create prosperity across the Sahel. The chapter also examines the geopolitical tensions involving major powers such as the USA, France, and China to understand how these relationships affect the region's economic stability and development prospects.

Background

Historically, the Sahel has served as a cradle for major Ancient and Medieval West and Central African kingdoms, acting as strategic waypoints and termini for trans-Saharan trade routes. Notable among these were the ancient Kingdom of Ghana, which emerged in the late fourth century and peaked around the year 1000 CE, followed by the influential empires of Mali, Songhai, and Kanem-Bornu. These kingdoms thrived as centres of trade and culture long after Ghana's decline, underscoring the Sahel's historical significance as a bridge between the arid north and the tropical south. The region, which is both ecologically diverse and culturally rich, faces major economic challenges that hinder its overall development and growth within the African continent. The Sahel has been severely impacted by climate change, which has accelerated land degradation, reduced water resources, and led to a decline in biodiversity. The "Great Sahelian Drought" of 1968-73 had a severe impact on the economic backbone of the Sahel, particularly in livestock and agriculture. This crisis witnessed a major mobilisation of international aid and the establishment of the International Fund for Agricultural Development (IFAD) by the United Nations (Epule et al., 2013) (Batterbury & Warren, 2001). Although subsequent decades saw similar drought situations, the Sahel demonstrated economic resilience, and societal coping mechanisms had been developed since the earlier catastrophe. Over the past three decades, the ecological boundary of the Sahel has shifted southward, resulting in a reduction of arable land and an increase in more frequent and severe droughts, desertification, and flooding. These environmental changes critically undermine agriculture, a vital sector for the region's economy. The Sahel region is also plagued by political instability, armed conflict and terrorism, which have disrupted livelihoods, threatened state stability, and eroded social peace. The COVID-19 pandemic has compounded these challenges, disrupting food production and closing markets and borders. Three important countries, Mali, Burkina Faso, and Chad, have undergone a series of coups in recent years, exacerbating political uncertainties (Ngima, 2023; Calcagno, 2025).

Sahel Countries: Overview of Economic Status

Before delving into the Sahelian economy, a brief yet comprehensive overview of the economic conditions in the region's countries is imperative. These countries collectively face a mix of structural challenges and opportunities shaped by natural resource endowments, political climates, and external economic pressures. The primary data source for this section is the African Economic Outlook 2024, along with other relevant open-source literature. (AEO, 2024).

1. Senegal. The Republic of Senegal, situated on the Atlantic Ocean coastline and the westernmost country in the Sahel, exhibits one of the most diversified economies in West Africa, which is underpinned by sectors such as agriculture, mining, construction, and services. Its economy grew at a rate of 4.3% in 2023, up from 3.8% in 2022, primarily driven by resilience in the agricultural sector and growth in industry. Inflation fell significantly from 9.7% in 2022 to 5.9% in 2023, supported by tighter monetary policies implemented by the Central Bank of West African States. Fiscal reforms and increased revenues helped narrow the budget deficit from 6.5% of the Gross Domestic Product (GDP) in 2022 to 4.9% in 2023 (AEO (Senegal) 2024). Senegal's economic growth is expected to accelerate to 9.3% in 2024, driven by the commencement of hydrocarbon production and increased investment in the infrastructure and energy sectors. Recent infrastructure investments and prudent fiscal policies have sustained steady economic growth. However, youth unemployment and climate vulnerability in agriculture remain major challenges. Offshore oil and gas discoveries (e.g. Sangomar Field Development near Dakar) hold transformative potential, provided revenues are equitably and effectively managed. The project, which could potentially make Senegal a major oil and gas powerhouse, is expected to generate more than $1 billion annually over the next three decades. (Africa News, 2024)

2. Gambia. The economy of the Republic of Gambia is relatively small (like its geographical expanse) and primarily reliant on agriculture, expatriate remittances, and tourism. At the same time, growth remains moderate but susceptible to external shocks and climate impacts. The country faces high debt levels and a narrow economic base. Strategic diversification in agriculture and the expansion of the tourism sector could catalyse economic stability. Gambia's economic growth was projected at 6.1% in 2024, supported by investments in agriculture, services, construction, and public infrastructure, with growth slightly slowing to 5.8% in 2025 due to climate-related vulnerabilities. Fiscal and current account deficits are expected to improve by narrowing to 2.7% and 7.2% of GDP by 2024. Inflation is projected to ease to 12.5% in 2024 and 11% in 2025, driven by tight monetary policies and declining global food and energy prices. (AEO (Gambia) 2024).

3. Mauritania. Mauritania's economy is largely driven by its resources, with iron ore and fisheries being the primary contributors. While its natural wealth, including untapped offshore oil reserves, presents opportunities, inadequate infrastructure and volatility in global commodity prices continue to impede development. Future economic prospects hinge on expanded resource extraction and infrastructure improvements. Mauritania's economic growth slowed to 3.4% in 2023, down from 6.4% in 2022, primarily due to reduced industrial and fisheries production, as well as lower public investment. Inflation dropped from 9.6% to 5% due to tighter monetary policies and easing food prices. The budget deficit improved to 2.3% of GDP, supported by increased tax revenue. In comparison, public debt fell to 48% of GDP following a debt restructuring deal with Saudi Arabia, thereby reducing the risk of debt distress to a moderate level. (AEO (Mauritania) 2024).

4. Guinea. Guinea possesses rich bauxite and iron ore reserves, with mining as the cornerstone of its economy. Its economy, one of the most resilient in West Africa, grew by an estimated 5.7% in 2023, up from 4% in 2022, driven by agriculture and mining. Inflation decreased from 10.5% in 2022 to 7.8% in 2023, supported by a stable exchange rate, mitigating imported inflation. Despite an increase in the budget deficit to 1.6% of GDP, Guinea maintained one of the lowest deficits among the Economic Community of West African States (ECOWAS) members. Public debt decreased from 40.1% of GDP in 2022 to 35.2% in 2023. However, challenges remain, including limited shock absorption capacity and a stable but high current account deficit at 8.6% of GDP, primarily financed by foreign direct investment in the Simandou iron ore project (AEO (Guinea) 2024). However, despite its resource wealth, political instability and infrastructure deficits constrain growth. Addressing these systemic issues and ensuring transparency in mining investments could unlock extensive economic gains.

5. Mali. Mali's economy, dominated by agriculture and gold mining, remains highly vulnerable due to its reliance on commodity prices and harvest outcomes. As one of the 25 poorest countries globally, cotton and gold exports account for approximately 80% of export earnings, underscoring their critical role in fiscal stability (Moody's Analytics, 2024). However, persistent political instability and security challenges continue to disrupt economic activities and deter investment. Despite these hurdles, Mali's economic prospects are improving, with growth projected at 4.7% in 2024 and 5.3% in 2025. Key drivers include the expansion of extractive industries, particularly the commencement of lithium production in 2024, alongside the revival of the textiles sector and the development of wheat production and processing. (AEO (Mali) 2024) Additionally, the gold industry remains a vital economic pillar with opportunities for growth through new exploration and investments in artisanal mining.

6. Burkina Faso. The landlocked Sahelian country, Burkina Faso, relies on agriculture and gold mining for economic sustenance. Burkina Faso's leading exports include gold, cotton, zinc, cashews, and sesame seeds. Imports include refined petroleum, delivery trucks, packaged medicines, electricity, and aircraft. Despite ongoing security challenges, Burkina Faso's economic growth rebounded to 3.6% in 2023, driven by the services and agricultural sectors. Inflation decreased substantially to 0.7% in 2023, primarily due to improved food supplies and restrictive monetary policies. The budget deficit improved from 10.4% of GDP in 2022 to 6.9% in 2023, supported by higher tax revenues. However, declining cotton export values widened the current account deficit to 8.2% of GDP. Growth prospects remain favourable, with projections of 4.1% in 2024 and 4.3% in 2025, supported by rising agricultural and extractive production (AEO (Burkina Faso) 2024). However, the country faces severe disruptions from extremist violence and political uncertainty. Expanding agricultural output through modern techniques and leveraging its mining potential could foster recovery and growth.

7. Niger. Niger remains one of the poorest countries in the Sahel region, heavily reliant on subsistence farming, livestock, and uranium mining. Uranium and oil production, alongside investments in renewable energy, present opportunities for sustainable growth. Niger's economy faced challenges in 2023, with growth slowing to 2.5% due to political instability, ECOWAS sanctions, and frozen external funding. However, the outlook for 2024 is positive, with a projected growth rate of 10.4%, driven by a five-fold increase in crude oil production and resilience in the agricultural sector (AEO (Niger) 2024). Inflation is expected to remain low due to robust agricultural performance. Fiscal consolidation and increased tax revenue from resumed commercial activities and oil production are anticipated to improve the budget deficit. At the same time, the current account balance is set to benefit from surging oil exports. However, challenges like desertification, poor infrastructure, and a rapidly growing population exacerbate its economic vulnerabilities.

8. Chad. Another landlocked country, Chad's economy is predominantly oil-based, supplemented by agriculture. Geographic isolation, insufficient infrastructure, and political volatility hinder development. While new oil field explorations promise economic expansion, enhancing agricultural productivity and fostering regional trade partnerships are essential for long-term growth. Its economy grew by 4.3% in 2023, up from 3.4% in 2022, driven primarily by a 13.3% surge in the oil sector and increased net exports. Inflation decreased to 4.8%, remaining above the regional target, due to high food prices. The budget surplus reached 4.8% of GDP, aided by exceptional oil revenues. (AEO (Chad) 2024) Despite this, poverty remains a challenge, with a 42.3% national poverty rate. Structural challenges persist, including a fragile banking sector and dependence on oil revenues. Also, the country faces challenges such as the refugee crisis, high food prices, and threats from racially or ethnically motivated violent extremist (REMVE) groups.

9. Cameroon. Cameroon is a lower-middle-income country with high levels of poverty with more than 23% of Cameroonians living below the international poverty line, but it boasts a diverse economic structure, including agriculture, oil and gas, mining and services. Despite this, corruption and unequal wealth distribution impede equitable development. Prioritising infrastructure expansion and better governance in natural resource management can support supplementary economic diversification and growth. Cameroon's economy grew modestly to 3.8% in 2023, up from 3.6% in 2022, driven by strong performance in forestry, logging, and services. Inflation rose to 7.4% due to higher food prices. The budget deficit narrowed to 0.9% of GDP, supported by rationalised public spending and tax reforms. Public debt decreased to

41.8% of GDP, while the current account deficit improved to 2.7%, driven by increased gas production. Economic growth is expected to rise to 4.1% in 2024, with increased gas production and commodity prices. (AEO (Cameroon) 2024).

10. Nigeria. As Africa's largest economy, Nigeria's economic profile is driven by vast oil reserves, agriculture, and a burgeoning services sector. The country is implementing reforms to improve its economy to face inflation, a depreciating currency, and a sluggish global economy (Nigeria Development Update, 2024). However, heavy reliance on oil revenues, political instability, and corruption present persistent challenges for Nigeria. Nigeria's economic growth slowed to 2.9% in 2023, down from 3.3% in 2022, due to high inflation and a depreciating Naira. Nigeria's inflation spiked to 24.5%, primarily influenced by rising fuel costs. Despite these challenges, the fiscal deficit improved to 5.1% of GDP in 2023, supported by higher revenues, though public debt service remains a concern at 111% of federal revenue. The current account surplus increased to 0.9% of GDP, bolstered by oil exports. Economic growth is projected to improve to 3.2% in 2024, driven by higher oil production and consumer demand. (AEO (Nigeria) 2024). Immense growth opportunities exist in sectors like technology, renewable energy, and agro-processing, which could reduce dependency on oil.

The above overview of the Sahelian countries presents a tapestry of economic opportunities and systemic challenges. While resource wealth offers pathways to growth, structural issues such as political instability, climate change, and inadequate infrastructure constrain progress. Key priorities include economic diversification, investment in human capital, and improving governance to achieve sustainable and inclusive development.

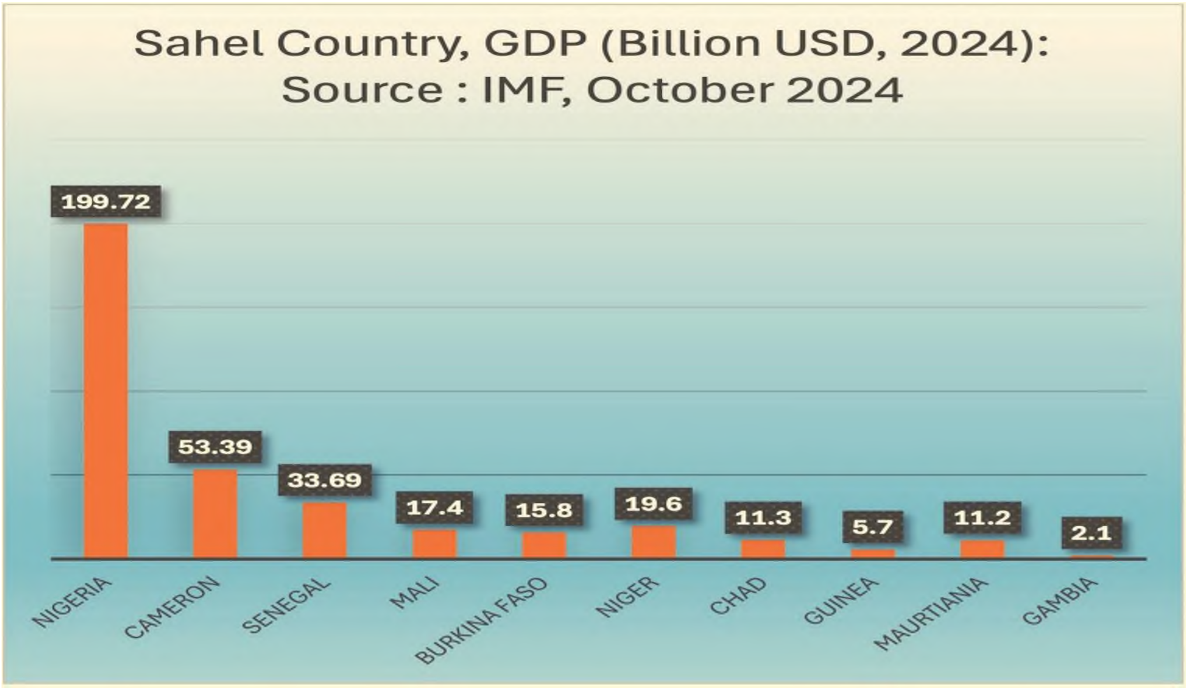
Reviewing IMF's GDP Data for Sahel Countries

Gross Domestic Product (GDP) data is always a key indicator of economic performance, measuring the total value of goods and services produced within a country. It, in reality, helps assess economic growth, compare economies, guide policy and investment decisions, and indicate living standards. It also highlights sectoral contributions, informs debt and fiscal management, and reflects global trade trends. Analysing the GDP of Sahel countries may help respective governments and investors to make strategic decisions to promote stability, diversification, and sustainable growth in the region.

Broadly, the GDP distribution among the Sahel countries, according to the IMF's World Economic Outlook (WEO, 2024), highlights major economic disparities, with Nigeria (199.72 billion USD) standing as the dominant economic power in the region, contributing the largest share to the Sahel's overall economic output. This reflects Nigeria's diversified economy, which benefits from major contributions from agriculture, manufacturing, and services despite its heavy dependence on oil exports. However, inflationary pressures, currency fluctuations, and security concerns often hampered Nigeria's economic growth. Cameroon (53.39 billion USD) is the second-largest economy in the Sahel, bolstered by a relatively diversified economy that includes agriculture, oil production, and a growing services sector. Despite its economic stability compared to some neighbours, Cameroon faces challenges such as corruption, political instability, and uneven regional development. The third-largest economy, Senegal (33.69 billion USD), is growing, supported by substantial public investments, a burgeoning services sector, and anticipated gains from hydrocarbon production. Its economic resilience stems from stable governance and an investor-friendly business environment, although structural weaknesses in infrastructure and youth unemployment remain challenges. (WEO, 2024)

The economies of Mali (17.4 billion USD), Burkina Faso (15.8 billion USD), and Niger (19.6 billion USD) are heavily reliant on agriculture and mineral resources, particularly gold and uranium. However, persistent political instability, insurgency threats, and climate change risks impact economic growth and investment inflows. These countries also struggle with weak industrial bases, high poverty rates, and inadequate infrastructure. Chad (11.3 billion USD) and Mauritania (11.2 billion USD) maintain lower GDP figures, primarily driven by their dependence on oil, mining, and agriculture. (WEO, 2024) Chad, in particular, faces economic volatility due to its reliance on oil exports, a fragile financial system, and ongoing security concerns. Mauritania benefits from its iron ore and fisheries, but remains susceptible to external shocks and fluctuations in global commodity prices. (WEO, 2024)

At the lower end of the spectrum, Guinea (5.7 billion USD) and Gambia (2.1 billion USD) represent some of the smallest economies in the region. Guinea's economy is driven by bauxite mining and agriculture, while Gambia relies on tourism, remittances, and agriculture. Both countries face high levels of poverty and structural economic challenges but have the potential for growth if strategic investments and reforms are implemented. (WEO, 2024)



(Source: Compiled from World Economic Outlook, IMF, October 2024)

https://www.imf.org/en/Publications/WEO/Issues/2024/10/22/world-economic-outlook-october-2024

The International Monetary Fund data shows that economies of the Sahel region are predominantly resource-driven, with countries relying heavily on commodities such as oil, gold, uranium, and iron ore. This dependence exposes them to fluctuations in global market prices, making economic stability uncertain. Additionally, political instability and security challenges in countries like Mali, Niger, and Chad constrain growth, as conflicts, coups, and governance weaknesses deter investment and disrupt economic activities. Limited industrialization and underdeveloped infrastructure hinder diversification, preventing long-term sustainability and economic expansion. However, there are emerging opportunities for transformation, particularly in countries like Senegal and Mauritania, which are capitalizing on new industries such as hydrocarbons, renewable energy, and agribusiness. Investments in technology and manufacturing could drive regional growth. The future of the Sahel's economy will largely depend on strategic policies prioritising diversification, regional cooperation, sustainable investments, and governance reforms to mitigate the risks posed by political instability and climate change.

The Economic Landscape of the Sahel

Despite the vital role agriculture plays in the economies of most of these countries—employing a major portion of the population—the sector struggles with productivity issues due to erratic weather patterns and inadequate infrastructure. This economic backdrop sets the stage for understanding the broader challenges and opportunities that define the region's prospects for growth. The Sahel is projected to experience economic growth, with an average rate of 4.7% over the medium term. While this growth is robust, it cannot narrow the income gap with more developed economies (International Monetary Fund, 2023). However, by 2030, the region's GDP is expected to increase by 110% from current levels, driven by improvements in infrastructure and improved access to energy. (International Energy Agency, 2022).

Sectoral Analysis. The agricultural sector remains central in the Sahel region, employing over 60% of the workforce. (Sahel Alliance, 2024) Despite its critical role in the economy, agricultural productivity faces numerous challenges, including the adverse effects of climate change and limited access to modern farming technologies. These factors hinder the sector's efficiency and output, impacting food security and regional economic stability. Similarly, the energy landscape in the Sahel is also noteworthy, with a heavy dependence on oil-based power generation, which accounts for 75% of the region's energy portfolio. However, there has been a gradual shift toward renewable sources (e.g., hydro or solar power), which now account for about 20% of the energy mix. Notably, Mali has made major strides in hydropower, while solar energy usage is increasing across the Sahel, indicating a gradual yet steady transition towards more sustainable energy solutions. The Sahel boasts a wealth of untapped natural resources that present opportunities for fiscal sustainability, which is especially important as the world shifts towards low-carbon energy sources (Cheikh et al. 2021). Effectively managing these natural resources is vital for ensuring long-term economic stability in the region. Each of these sectors—agriculture, energy, and natural resources—plays a pivotal role in the economic landscape of the Sahel, and strategic enhancements in these areas could lead to substantial improvements in the overall economic health of the region.

Demographic Dynamics. The Sahel region is also undergoing demographic shifts that are shaping its economic and social landscapes. The population is projected to grow from 100 million in 2019 to 140 million by 2030, a substantial increase that highlights the region's high fertility rates and improving, yet still uneven, healthcare outcomes (International Energy Agency, 2022). This rapid population growth presents both challenges and opportunities, particularly as it coincides with increasing urbanisation. Cities and urban centres in the Sahel are expanding, which strains existing infrastructure and services and provides new avenues for economic development and innovation.

Although the Sahel's demographic profile is notably youthful, a large proportion of the population is under 25. (UNDP, 2024). This youthful demographic could potentially provide a demographic dividend and a boost to economic growth, resulting from a larger workforce relative to the dependent population, provided that sufficient investments are made in key areas. Realising this potential dividend hinges critically on strategic investments in education and job creation. Educational systems need to be scaled and enhanced to equip this burgeoning youth population with the skills required in modern and developing economies. Simultaneously, there needs to be a focus on creating job opportunities to absorb these young individuals into productive employment sectors. Without these targeted investments, the growing number of young people could exacerbate unemployment and underemployment, leading to social and economic instability. Arguably, the Sahel stands at a critical juncture, where the decisions made today regarding education, urban planning, and economic policy will shape the region's future. Prioritising education and employment can transform the challenges of rapid demographic changes into a springboard for sustainable growth and development.

Challenges. For several decades, the Sahel region has faced complex economic and environmental challenges that substantially impact its development prospects. Rising public debt levels are a major concern. As of 2023, the average public debt in the Sahel has reached approximately 51% of GDP (International Monetary Fund, 2023). This high indebtedness restricts the region's ability to borrow more, underscoring the urgent need to enhance domestic revenue collection and shift the focus towards grants and non-debt-creating inflows to finance development projects.

Food security across the Sahel, severely impacted by structural and environmental factors, remains a critical challenge. Projections for 2023 indicate that approximately 45,000 people, including 42,000 in Burkina Faso and 2,500 in Mali, are experiencing catastrophic levels of hunger (Guèye and Mbaye, 2024). This situation is exacerbated by inadequate agricultural productivity and recurring natural disasters, which disrupt food supply chains and increase the vulnerability of the poorest communities. A 2023 projection indicated that Africa's annual food imports could surge from $35 billion to $110 billion by 2025, highlighting the region's heavy dependence on external food supplies (World Meteorological Organisation, 2023). The depth of the crisis is evident in the Global Food Security Index, where Sahelian nations occupy some of the lowest positions—Burkina Faso ranks 89th, Niger 97th, Chad 103rd, and Nigeria 107th among 113 countries (Guèye and Mbaye, 2024). These figures underscore the urgent need for coordinated interventions to address the root causes of food insecurity and strengthen local food systems.

For the past several decades, Sahel has been experiencing severe impacts from climate change, threatening its agricultural sector and amplifying existing economic and social pressures. Rising temperatures and erratic rainfall patterns have led to frequent droughts and floods, which have severely affected crop yields and livestock productivity. These adverse effects on agriculture, a cornerstone of the

Sahel's economy, are reducing food availability and driving migration within and across countries as people search for better living conditions and economic opportunities.

Addressing these challenges requires a multipronged approach focused on strategic development and effective resource management. The Sahelian countries need to leverage their diverse and dynamic potential through targeted initiatives that enhance agricultural resilience, promote sustainable economic practices, and build robust infrastructures to withstand climate impacts. By doing so, the region can transform its challenges into opportunities for sustainable economic development and long-term prosperity.

Countries such as Mali, Burkina Faso, Chad, Mauritania, and Niger remain among the least developed in the world. The GDPs of these countries are markedly lower than global averages, with agriculture playing a crucial role in their economies, employing a major portion of the population. However, the productivity of this sector is frequently undermined by erratic weather patterns and inadequate infrastructure. The region indeed exhibits a mix of promising growth potential alongside socio-economic challenges. However, addressing public debt management, food security, and climate resilience remains crucial for sustainable development in the coming years.

Challenges Affecting Economic Stability

As mentioned in the paper, the Sahel is inherently vulnerable to climate change, which exacerbates issues such as desertification and unpredictable rainfall patterns. These environmental changes have a severe impact on agriculture, reducing the amount of arable land and diminishing agricultural productivity. Such ecological degradation poses a significant threat to food security and the economic foundation of a region heavily reliant on agriculture. The Economic Commission for Africa, as far back as 2007, predicted that if land degradation continues at the current rate, more than half of cultivated agricultural land in Africa, particularly in the Sahel region, could be rendered infertile by 2050 (UN-OHRLLS, 2013) (United Nations Economic and Social Council, 2007).

Security concerns further exacerbate the Sahel's challenges, with various religiously extremist groups affiliated with Al Qaeda and DAESH (e.g., DAESH Sahel Province or ISSP) causing widespread instability across national borders. The presence of these groups undermines the region's economic prospects. The resultant instability deters foreign investment and disrupts internal and cross-border trade, stunting economic growth and development. Political instability is another critical challenge, with many Sahel countries experiencing frequent coups, weak governance, and turbulent political transitions. This instability complicates the investment climate and long-term economic planning, impeding development efforts.

Additionally, infrastructural deficits limit economic progress in the Sahel. As correctly noted in various developmental studies, inadequate infrastructure, including poor road networks, insufficient power supply, and limited technological access, primarily hampers economic activities in rural areas, where the majority of the population resides (Jeffang et al., 2024). Despite these challenges, concerted efforts are being made to improve the region's economic prospects. Initiatives like the Sahel Alliance (2023) are mobilising resources to enhance infrastructure, education, and healthcare systems, which are crucial for fostering sustainable development and economic resilience (Bassou, 2024). While the Sahel faces numerous hurdles, a comprehensive understanding of its multifaceted challenges is crucial for developing effective strategies to promote economic stability and growth. The region's economic resilience will depend on addressing environmental and socio-political challenges, improving infrastructure, and leveraging international cooperation for sustainable development. By tackling these issues holistically, the Sahel has the potential to enhance its economic stability and achieve sustainable growth, turning its major challenges into opportunities for development.

Geopolitical Dynamics and External Powers in the Sahel

The Sahel region, strategically positioned as a geopolitical and economic corridor, has drawn significant attention from several major global powers, including the United States, the European Union, France, China, and Russia. Each of these nations has interests in the region that range from security and counterterrorism to economic investments and geopolitical influence. The interactions among these powers largely influence the Sahel's political and economic landscape, often complicating the region's internal dynamics.

The United States. For over a decade, the United States framed the Sahel as a critical front in the global fight against extremism. Its approach combined a strong counterterrorism footprint, including military bases and drone operations, particularly in Niger, with large-scale foreign aid and development programs to bolster economic stability and democratic governance. These measures supported direct counterterrorism goals and indirectly addressed the root causes of extremism. Economic initiatives of the US also sought to counter China's rising influence, channelling substantial investments into energy, infrastructure, and governance reforms. A 2024 United States Institute of Peace (USIP) report identified several key trends shaping the region's future, including: growing influence of China and Russia alongside France's declining role; expanding involvement of Algeria, Morocco, UAE and Türkiye; a destabilizing "youth bulge"; and increasing threats to agriculture and food security from conflict, terrorism, and climate change (USIP, 2024).

This strategy underwent a significant shift in March 2025, when the US announced the cancellation of 83% of USAID programs (Knickmeyer, 2025) (APA News, 2025). These cuts came amid a wave of uncertainties and growing instability in the Sahel, as observers warn that the sudden US aid cuts have eroded Washington's influence in the region, creating a strategic vacuum now being filled by Russia and China. Aid organizations highlight the loss of programs like USAID's Resilience in the Sahel Enhanced (RISE) initiative, which had demonstrably strengthened food security and community resilience in Burkina Faso and Niger.

According to a June 2025 UN OCHA (UN Office for the Coordination of Humanitarian Affairs) report, nearly 28.7 million people in the Sahel required urgent food, health, and protection assistance, reflecting a worsening humanitarian crisis driven by insecurity, displacement, and climate shocks. With limited funding, aid agencies were forced to scale back support for the most vulnerable, intensifying already dire conditions (OCHA, 2025) (Solomon, 2025). However, despite the aid cuts, the US has possibly not fully withdrawn from the region, as its approach may still emphasize intelligence-sharing, counterpropaganda, and selective partnerships, particularly with Morocco, Mauritania, and littoral West African states. This recalibration, with all uncertainties remaining, may mark a shift from a heavy military and aid footprint to a more targeted engagement model. However, many observers warn that the abrupt exit of a major donor risks undermining the stability and long-term development of the Sahel.

France. France's involvement in the Sahel region is deeply rooted in its colonial history, fostering cultural ties and strategic interests that continue to shape its current engagements. It has long been the Sahel region's primary security provider, with its involvement dating back to Operation Serval in 2013, aimed at combating religiously extremist militants in Mali. This was expanded into Operation Barkhane in 2014, deploying over 5000 soldiers across the Sahel. Beyond military intervention, economic and humanitarian aid efforts have been France's primary focus in the Sahel for decades. However, France's economic and strategic interests in the region have come under increasing strain, compounded by rising civil unrest. Anti-French sentiment has fuelled protests in Mali, Burkina Faso, and Niger, reflecting discontent with perceived neo-colonial influence and the perceived ineffectiveness of addressing security and governance challenges. In August 2022, France withdrew its final troops from Mali, a decision influenced by escalating tensions and allegations of Russia's private army involvement in the region (Powell, 2022). So far, this withdrawal is disrupting France's economic foothold in the resource-rich Sahel and raising uncertainty for other European nations that have supported regional security efforts. France's diminished presence risks ceding economic and strategic ground to other global powers, including China and Russia, further complicating the region's geopolitical landscape. The military presence of France in the Sahel primarily focused on supporting local governments to combat various insurgent groups and securing regions critical to French economic interests, particularly in uranium mining areas in Niger (Petidis, 2024) (Angyal, 2025). Such interventions aim to stabilise the region while protecting its economic stakes, reflecting a blend of security-driven and economic motivations behind its continued presence in the Sahel.

China. China's engagement in the Sahel is critical to its expansive economic strategy across Africa. It is driven by the desire to access the region's natural resources and strengthen its geopolitical influence through economic partnerships. Chinese investment in Africa broadly reflects a strategic mix of various objectives, ranging from economic, political, and security goals to securing resources, growing influence, and accessing important markets. The Belt and Road Initiative (BRI) remains the cornerstone of this engagement, focusing on large-scale infrastructure projects, such as transportation and power, alongside mining investments critical for China's industrial needs. (Chen, 2018). Guinea's Simandou iron ore mine and Niger's uranium sector (e.g. in Azelik) exemplify such priorities (Nyabiage, 2023) (Nantulya, 2025). China's infrastructure investment is coupled with arms exports and military aid, making it a key security partner in regions like the Sahel, where instability has opened opportunities for deeper involvement.

China's role extends beyond economic domains to defence diplomacy, with training programs for African military personnel and increasing peacekeeping deployments. This shift underscores Beijing's growing acknowledgment of the interdependence between security and economic development, as exemplified by its $50 billion security aid pledge during the 2024 Forum on China-Africa Cooperation (Calabrese and Chen, 2024). Meanwhile, its investments are framed as "win-win" cooperation, emphasising noninterference and avoiding the political strings often associated with Western aid. However, critics note that China's actions sometimes mirror neocolonial patterns, prioritising resource extraction and creating long-term dependency. Concerns also persist about the sustainability of debt from loan-financed infrastructure, the lack of transparency in contracts, and whether the benefits of resource exploitation are equitably shared with local populations.

Key projects, such as the Trans-Saharan Highway, demonstrate the scale of China's infrastructure ambitions in the region, enhancing connectivity and boosting trade. These developments have generated employment opportunities and spurred short-term economic growth. However, they also risk leaving countries with unsustainable debt burdens and infrastructure that may serve Chinese strategic interests more than local needs. Environmental and social concerns have further complicated perceptions of China's role, with large-scale projects sometimes prioritizing economic output over ecological and community welfare (Cuscito, 2023).

The geopolitical significance of China's presence is amplified by the decline of Western influence, particularly that of France and the US, both of which face growing anti-Western sentiment. This has allowed Beijing to step in as an alternative partner, providing investment, arms, and diplomatic support while strengthening its position in multilateral forums. For the Sahel, this presents both opportunity and risk: Chinese capital has the potential to accelerate infrastructure development and economic growth, but without careful management, it may also entrench dependency, undermine sovereignty, and compromise long-term sustainable development. Several recent developmental studies evaluating the impact of Chinese Infrastructure Projects in the Sahel highlighted these concerns, indicating growing scrutiny over China's role and the long-term impacts of its investments in the region (Nantulya, 2025) (Rajosefa, 2023). The future of China's role in the Sahel will largely depend on the region's ability to navigate this relationship strategically, striking a balance between economic benefits and sovereign integrity, as well as sustainable development goals.

The Interplay of Geopolitical Interests in the Sahel

The Sahel region serves as a stage for a complex interplay of geopolitical interests involving major global powers such as the United States, France, and China, each pursuing distinct strategic agendas. While the US and France focus on security measures and counterterrorism efforts, China's involvement is primarily driven by economic interests. This divergence in strategic priorities can occasionally lead to tensions among these powers, but it also provides Sahel countries with unique opportunities to leverage these differences to their benefit. (Lebovich, 2024).

The US and France's security-oriented approach aims to combat racially and ethnically motivated violent extremist groups and stabilise the region, which aligns with their broader goals of maintaining influence and ensuring the safety of their investments, particularly in areas critical to energy and natural resources. On the contrary, China has capitalised on the opportunity to embed itself economically within the Sahel through massive infrastructure projects, investments in key sectors like mining and agriculture, and the establishment of robust trade relationships. These divergent approaches create a dynamic in which Sahel governments have the potential to negotiate terms that better serve their developmental and sovereignty needs, using the competition among these powers to extract more favorable deals and investments.

The involvement of external powers in the Sahel highlights a broader geopolitical competition and considerably impacts the region's stability and developmental trajectory. The strategic presence of the U.S., France, and China introduces a mix of challenges and opportunities. Each power brings different resources and strategic intents to the region, influencing local political landscapes, economic development, and regional stability. As these global powers advance their respective interests, the primary challenge for the Sahel lies in navigating these complex relationships to enhance regional stability, drive economic growth, and foster greater self-sufficiency. Achieving these goals requires skilled diplomatic and strategic engagement from Sahel countries to ensure that the involvement of external powers translates into tangible benefits rather than perpetuating dependency or conflict. This delicate balance of managing external influences while prioritising internal priorities is crucial for the Sahel to harness its full potential and chart a path toward sustainable development and autonomy.

Sahelian Economies vs. Other Developing Regions in Africa

The Sahel region and the Horn of Africa share several economic characteristics, including heavy reliance on natural resources, agriculture, and external aid, as well as vulnerabilities to political instability, climate change, and security threats. There are many key differences in economic structures, growth trajectories, and resilience strategies. As discussed above, the Sahelian economies are largely resource-driven, heavily relying on gold, uranium, oil, and agriculture. Countries such as Mali, Niger, and Chad rely heavily on extractive industries, making them vulnerable to fluctuations in commodity prices. In contrast, the Horn of Africa economies or the peninsular eastern Africa, including Ethiopia, Somalia, and Djibouti, rely more on trade, logistics, and agriculture. Djibouti benefits from its strategic port location, while Ethiopia has focused on industrialization and infrastructure-led growth.

Both these African regions experience socio-political instability. However, the nature of conflict differs in both African regions. While the Sahel faces persistent racially and ethnically motivated extremist insurgencies, particularly in Mali, Niger, and Burkina Faso, which majorly disrupt economic activities, the Horn of Africa grapples with protracted civil conflicts (e.g., Ethiopia's Tigray War, Somalia's power struggle induced instability), but countries, like Kenya, somehow maintain relative stability, attracting more economic trade and investment. However, a part of the instability in Somalia is also driven by the persistent threat of extremism posed by al-Shabaab, an al-Qaeda-affiliated terrorist group that conducts attacks against government forces, civilians, and international peacekeeping missions (Agha, 2023). This has broader implications for the Horn of Africa, affecting regional security and economic stability. Neighbouring countries like Kenya and Ethiopia frequently contend with cross-border incursions and terrorism spillovers, while maritime piracy in the Gulf of Aden remains a lingering concern. The fragile governance structures in Somalia also hinder broader efforts for regional cooperation and development initiatives across the Horn of Africa.

According to the World Meteorological Organization (2024), African countries are losing 2–5% of their GDP annually due to climate extremes, with some diverting up to 9% of their budgets to disaster response. By 2030, an estimated 118 million people living in extreme poverty are expected to face increased exposure to droughts, floods, and extreme heat if adequate adaptation measures are not implemented (World Meteorological Organization, 2024). This would worsen poverty levels and hinder economic growth, placing major strain on development efforts. The Sahel and Horn of Africa are no exception and are not immune to the effects of climate change, whether human-induced or otherwise. Both regions face climate-induced challenges, including desertification and droughts, which affect agricultural productivity. (Pichon (et. al.) 2024). The Sahel is at risk due to rapid desertification, while the Horn of Africa has faced recurrent droughts and locust infestations, which have severely impacted food security. Countries like Ethiopia and Kenya (in the Horn/East Africa) have invested in irrigation and climate-resilient agriculture.

In contrast, the Sahel remains lagging in adaptive infrastructure, despite initiatives such as the Great Green Wall project. Infrastructure and economic diversification are vital for both regions. While the Horn of Africa is advancing in connectivity, with Ethiopia leading industrialization efforts and Djibouti positioning itself as a logistics hub, the Sahel region remains heavily dependent on agriculture and mining, with limited industrial growth except, of course, for Senegal and Mauritania, which are leveraging hydrocarbons and renewables, signalling potential diversification. (World Meteorological Organization, 2024).

Last but not least, the Horn of Africa, like the Sahel region, is too deeply intertwined with the interests of global powers such as the US, China, and Gulf countries, primarily due to its strategic maritime importance. Military bases in Djibouti, operated by France, the US, and China, reflect the country's geopolitical significance and its impact on the region's economy.

While the Horn of Africa and the Sahel share varying degrees of underlying challenges, their trajectories are shaped by distinct geopolitical and economic dynamics. The Horn of Africa's maritime importance and ethnic conflicts make it a hotspot for regional rivalries and external interventions. In contrast, the Sahel's challenges are more tied to transnational terrorism (dominated by IS and AQ-linked groups), military takeovers, and resource-driven conflicts.

Strategic and Policy Recommendations for Sahel Development

A comparative view of the Sahel and the Horn of Africa highlights that addressing their interconnected security and economic challenges necessitates a balanced combination of regional cooperation, institutional reforms, and sustainable investments in governance and infrastructure. The absence of such measures risks deepening instability, worsening humanitarian crises, and derailing long-term socio-economic development. The Sahel, in particular, remains highly vulnerable, with its trajectory shaped by persistent insecurity, fragile governance, and an overdependence on natural resources. These conditions have constrained growth and eroded resilience in the face of climate change, demographic pressures, and growing external competition.

To tackle these challenges, a forward-looking strategy can be recommended across three key areas: governance and institutions, regional and international cooperation, and economic diversification and sustainability.

1. **Governance and Institutions**

1.1. The Sahel's long-term development depends on strengthening governance and institutional capacity. Building the rule of law, fighting corruption, and enhancing administrative efficiency are crucial for creating an environment that fosters investment and sustainable growth.

1.2. Enhancing institutional performance will ensure better allocation of resources, more effective policy implementation, and greater accountability, which are critical for both domestic stability and external credibility.

2. **Regional and International Cooperation**

2.1. Regional and international collaboration is a cornerstone for addressing the Sahel's interconnected challenges. Platforms such as **ECOWAS, the Alliance of Sahel States (AES), and the G5 Sahel** provide frameworks for jointly tackling security threats, managing cross-border resources, and coordinating trade and infrastructure development. (Leonard et.al., 2025) (Klomegah, 2025).

2.2. By strengthening collective initiatives in areas such as trade facilitation and security coordination, Sahelian states can amplify their bargaining power in global affairs. At the same time, carefully managing international partnerships is vital to ensure that foreign engagement supports regional priorities while balancing the influence of external powers.

3. **Economic Diversification and Sustainability**

3.1. Economic diversification is crucial to move beyond the Sahel's dependence on agriculture and mining. Expanding into sectors such as manufacturing, services, and digital technology will strengthen resilience and reduce vulnerability to commodity shocks. Governments should create policies that incentivize investment, support small and medium enterprises (SMEs), and integrate local businesses into global value chains.

3.2. Equally important is the development of sustainable infrastructure in transport, energy, and water management, which underpins productivity and climate adaptability. Expanding renewable energy and climate-resilient agricultural practices will not only address environmental vulnerabilities but also generate jobs and foster inclusive, long-term growth.

Conclusion

The future of the Sahel region lies in a balanced approach that incorporates strategic internal development, prudent management of external influences, and enhanced regional cooperation. By adopting comprehensive strategies and policies that address immediate needs and long-term goals, the Sahel can transform its challenges into opportunities, paving the way for a more stable and prosperous future. The region, marked by its complex socio-economic and geopolitical landscape, stands at a critical juncture. This chapter has explored the intricate dynamics of the Sahel's economy, the role of external powers like China, the USA, and France, and the challenges and opportunities these elements present. The analyses underscore that while the Sahel faces substantial hurdles due to environmental degradation, political instability, and economic underdevelopment, there are also considerable opportunities for growth and transformation.

The involvement of external powers (including Russia or the European Union) has introduced resources and complexities to the Sahel's development equation. China's economic ventures, primarily through the BRI, have brought infrastructure, investment, and concerns regarding debt sustainability and sovereignty. Similarly, the security-focused engagements from France and the United States have helped counteract regional terrorism threats but have also sometimes overshadowed the broader development needs of the region. Strategic and balanced approaches are necessary for the Sahel to harness its full potential. This entails managing external influences through diplomatic and economic strategies, while also bolstering internal capabilities. Strengthening governance, investing in sustainable infrastructure, diversifying the economy, and enhancing human capital are critical steps toward building a resilient Sahel. The Sahel's trajectory will substantially depend on the region's ability to navigate its internal challenges while strategically engaging with external partners. Enhanced regional cooperation, effective resource management, and proactive policy-making are essential to converting the Sahel's potential into tangible progress and sustainable development.

For the Sahel, the path towards economic prosperity remains an uphill task. However, the region can achieve stability and economic prosperity with informed strategies and regional collaborative efforts. The global community's role, particularly that of key players such as China, the USA, and France, will be crucial in shaping the future of Sahel countries.

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