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ANALYTICAL REPORT

CONTINENTAL EARLY WARNING AND SECURITY OUTLOOK

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I. INTRODUCTION

1. Africa enters the 2025–2026 period at a moment of acute strategic vulnerability. The expansion, diversification, and entrenchment of terrorism have placed the continent at the center of the global extremist threat. This transformation is the product not only of the growing capabilities of armed groups but also of deeper systemic pressures: governance erosion, socio-economic strain affecting millions of youth, regional political fragmentation, climate-induced livelihood collapse, and the flourishing of transnational illicit economies. These pressures have converged to create a continental landscape in which extremist organizations now possess the maneuverability, resources, and adaptive capacity to challenge state authority across multiple regions simultaneously.

2. In this environment, the African Union Counter-Terrorism Centre (AUCTC), through its integrated CT-CEWS monitoring platform, intensified its capacity to detect, analyze, and anticipate risk dynamics across the continent. The Centre also strengthened its analytical interface with the Continental Early Warning System (CEWS), ensuring complementarity and mutual reinforcement between counter-terrorism monitoring and broader conflict-prevention assessment. Throughout 2025, the AUCTC maintained continuous surveillance of all major theatres of concern, drawing on ground reporting from Member States, liaison with regional structures, digital intelligence collection, threat-finance monitoring, and structured analytical methodologies. This assessment synthesizes these insights into a comprehensive narrative aimed at supporting the Peace and Security Council's strategic decision-making.

3. The purpose of this report is twofold. First, it provides a continental overview of terrorism and broader security trends observed in 2025, identifying the structural, operational, and political drivers shaping Africa's evolving threat landscape. Second, it assesses horizon indicators for 2026, including one of the most consequential risks the continent has faced in recent years: the possibility of a partial takeover of Bamako by a coalition of non-state armed groups should current trajectories persist. This projection does not represent a prediction but rather an analytically grounded warning based on AUCTC's multisource monitoring during 2025. This assessment should therefore be read both as a warning and as a roadmap. The warning is that extremist networks are evolving more quickly than state institutions in several theatres, exploiting governance vacuums, political instability, and unregulated digital spaces. The roadmap lies in strengthening the interface between early warning and early action, grounded in continental mechanisms endorsed by Member States and supported by Africa's expanding leadership within the global counter-terrorism architecture. The year 2025 also marked an important milestone in the AUCTC's analytical evolution, reflecting nearly two decades of institutional development since its establishment in 2004.

II. CONTINENTAL OVERVIEW OF THE 2025 SECURITY AND TERRORISM LANDSCAPE

4. The year 2025 witnessed a deepening of structural insecurity across multiple African regions, confirming that the continent remains the global epicenter of terrorism. By September 2025, more than 3,000 attacks had been recorded, averaging 48 fatalities per day. These statistics reflect not only the sheer lethality of extremist organizations but also the deepening of their governance ambitions and their ability to exploit the vacuums created by political crises, social fragmentation, and institutional strain.

5. Violent extremist organizations have evolved into hybrid ecosystems. They combine insurgency, territorial control, social regulation, taxation, criminal enterprise, and information manipulation. Increasingly, they present themselves not simply as armed actors but as alternative

authorities, particularly in peripheral and rural areas where state presence is limited or contested. In multiple Member States, these groups regulate movement, adjudicate disputes, enforce social norms, extract revenues, and control access to land and water. Their governance systems have also produced severe humanitarian consequences, including restricted access to education, the collapse of basic health services, and the degradation of supply chains for essential goods in remote communities.

6. Fragmentation within regional political spaces further intensified this dynamic. Unconstitutional changes of government (UCGs) in the Sahel and parts of Central Africa weakened multilateral cohesion and disrupted joint operations. The coup in Guinea-Bissau in late 2025 serves as the most recent example of this destabilizing trend, underscoring a widening crisis of legitimacy and institutional weakness. These disruptions have diluted security cooperation, complicated intelligence sharing, and created openings for extremist actors to deepen influence.

7. The technological dimension of extremism expanded dramatically. Extremist groups increased their use of drones (Unmanned Aerial Systems-UAS) for reconnaissance and attacks, encrypted communication for decentralized command, and online platforms—including AI-generated content—to manipulate narratives, recruit across linguistic divides, and incite hostility toward state institutions. These groups also enhanced their use of crypto-assets, mobile-money systems, and informal transfer networks to move resources across borders, significantly complicating traditional counter-finance mechanisms.

8. A critical factor in the financing of extremist groups is the illicit exploitation of natural resources. Artisanal mining in gold-rich corridors across the Sahel, fuel smuggling networks spanning Niger and Nigeria, timber trafficking in Central Africa, illicit taxation of pastoralist mobility, and control of cross-border trade routes have become integral to extremist revenue streams. These criminal-political economies—complex networks linking local actors, foreign brokers, corrupt officials, and armed groups—have transformed extremist movements into financially resilient actors capable of sustaining prolonged campaigns.

9. Kidnapping-for-ransom remains one of the most lucrative sources of financing. A recent example is the reported ransom payment for the release of Emirati nationals abducted in northern Mali—a payment whose scale has substantially strengthened JNIM's financial base. Such payments violate AU Assembly Decision Assembly/AU/Dec.256 (XIII) (2009) and subsequent Decision 311(XV) (2010), which condemn and criminalize ransom payments to terrorist groups. These AU norms emphasize that ransom funds not only enable armed groups to acquire weapons, logistics, and influence but also encourage future kidnappings and destabilize financial governance frameworks. AUCTC analysis warns that ransom-based finance significantly enhances extremist groups' ability to buy loyalty from communities and armed factions, thereby shaping local political dynamics.

10. Across the continent, the overall trend is one of convergence: converging armed groups, converging illicit economies, converging technologies, and converging vulnerabilities. Within this broader continental picture, the Sahel—and particularly the Alliance of Sahel States (AES)—has become the most acute and strategically consequential theatre confronting Africa.

III. THE SAHEL AND AES REGION: CORE DYNAMICS AND HIGH-IMPACT INDICATORS

11. The Sahel continues to serve as the structural epicenter of Africa's terrorism threat. The AES countries—Mali, Burkina Faso, and Niger—form a single interconnected zone of insecurity spanning vast, sparsely governed spaces. In this environment, extremist groups exploit shared ethnic, commercial, and migratory networks, enabling a fluid movement of fighters, weapons, and resources across borders.

12. Throughout 2025, Jama'at Nusrat al-Islam wal-Muslimin (JNIM) and the Islamic State Sahel Province (ISSP) augmented their efforts to consolidate control and influence across the Liptako-Gourma region. ISSP, which fielded approximately 400 fighters in 2018, now commands more than 3,000 combatants. JNIM, meanwhile, maintains a deeply embedded presence in Mali's central and northern regions, leveraging community grievances and governance vacuums. Their rivalry has not weakened either group. Instead, it has fragmented the security landscape and overwhelmed the capacity of national forces to respond effectively.

13. Burkina Faso remains one of the most affected countries. Approximately half of its territory outside Ouagadougou is under some degree of extremist control or influence. These groups regulate movement, impose taxes on transport and commerce, adjudicate disputes, and shape access to land and resources. Encirclement of Ouagadougou, while not imminent, is no longer beyond the realm of possibility if peripheral areas continue to collapse. Niger faces a similar pattern. Attacks on strategic nodes such as Assamakka highlight the intent of extremist networks to consolidate corridors linking Mali, Burkina Faso, Niger, Nigeria, and southern Algeria. Assamakka, in particular, serves as a critical junction for migration flows, trade routes, and fuel transport. Repeated attacks against this node are designed to degrade state control and assert extremist dominance over cross-border mobility.

14. AUCTC CT-CEWS monitoring throughout 2025 identified several indicators of systemic threat in the AES region: erosion of administrative authority in rural areas; institutional overstretch of armed forces; militarization of community grievances; collapse of local justice mechanisms; and widespread reliance on non-state actors for security and dispute resolution. These conditions collectively signal a deepening crisis of sovereignty in all three AES countries.

IV. MALI SPECIAL FOCUS: THE 2025 SIEGE OF BAMAKO AND 2026 SCENARIOS

15. Among all theatres monitored in 2025, Mali presents the most acute and strategically consequential risk. Beginning early in the year and intensifying throughout 2025, JNIM implemented a strategy of coercive encirclement targeting Bamako through a dispersed blockade of supply routes—especially those transporting fuel—from Senegal and Côte d'Ivoire. This blockade has evolved into a complex system of interdiction points across rural corridors in southern and central Mali.

16. By November 2025, the blockade had triggered a nationwide fuel crisis, the closure of schools and universities, and a significant contraction in economic activity. Diplomatic missions reduced staffing levels, and multiple partner governments issued travel advisories instructing their nationals to leave the country. The social and economic pressure on Bamako is mounting, while national institutions struggle to respond.

17. AUCTC analysis underscores that the blockade is not a traditional siege but a dispersed pressure system designed to erode state authority while minimizing insurgent exposure. Malian security forces face acute constraints in countering this strategy, including limited air mobility, logistical shortfalls, and weak intelligence fusion. Their operational effectiveness has been further undermined by a growing reliance on external private military companies whose conduct has been widely criticized. Allegations of serious human rights violations attributed to these private actors have deepened mistrust among local communities, eroding the very cooperation and intelligence flows that are essential for restoring state presence and regaining the initiative.

18. AUCTC's CT-CEWS platform indicates that, if current trajectories persist, a scenario in which non-state armed groups achieve a partial takeover—or exercise partial functional domination—of Bamako during 2026 cannot be discounted. Multiple structural indicators point to this trajectory: the sustained encirclement of strategic supply routes; deepening internal political tensions within the

transitional authorities; fragmented command structures; and growing insurgent mobility into southern regions traditionally considered safer. Equally concerning is the rapid deterioration of socio-economic conditions in the capital. The prolonged fuel crisis, contraction of essential services, and collapse of livelihoods have created a climate of acute hardship, heightening the risk of public unrest or spontaneous uprisings. At the same time, the influx of internally displaced persons fleeing violence in central and northern regions has placed significant strain on Bamako's already limited infrastructure, exacerbating tensions between host communities and newcomers. Taken together, these pressures increase the likelihood of institutional implosion and reduce the state's capacity to withstand a coordinated insurgent offensive.

19. Such a scenario would have far-reaching regional repercussions. It could trigger mass displacement, reconfigure regional alliances, embolden extremist networks across the Sahel and West Africa, and significantly undermine the credibility of continental and international stabilization efforts. AUCTC considers Mali the most critical early-warning theatre for 2026.

V. EXPANDING PERIPHERIES: WEST AFRICA'S COAST, LAKE CHAD, GREAT LAKES AND THE HORN

20. The destabilization of the Sahel is now radiating into neighboring regions. In October 2025, JNIM claimed responsibility for an attack inside Nigeria's Kwara State, demonstrating an operational reach beyond traditional Sahelian theatres. This event represents an important indicator: extremists are probing new environments and testing the resilience of states previously considered peripheral to Sahelian insecurity.

21. Benin, Togo, Ghana, and Côte d'Ivoire have reported increasing infiltration along forest corridors, artisanal mining belts, and underserved border communities. These incursions are designed to establish logistical footholds, facilitate recruitment, and prepare the ground for deeper penetration should Sahelian states continue to weaken.

22. In the Lake Chad Basin, ISWAP and Boko Haram maintain significant operational resilience. Their ability to exploit the economic ecosystems surrounding Lake Chad— including fishing, small commerce, and taxation of mobility—provides a durable financial base. In the Great Lakes region, the ADF/ISCAP has strengthened its hybridization with transnational criminal networks involved in mineral and timber smuggling.

23. In the Horn of Africa, Al-Shabaab remains one of the continent's most sophisticated extremist organizations. Its fiscal autonomy, media operations, taxation systems, and operational tempo remain largely intact despite international counterterrorism efforts. The group's ability to generate significant revenue internally enables it to sustain military campaigns and expand its influence.

24. AUCTC monitoring warns that without coordinated preventive engagement, these peripheries risk becoming new fronts of destabilization linked to the Sahel core. The risk of a continuous belt of insecurity—stretching from central Mali to northern Benin and into Nigeria's interior—could become a reality in 2026 if current trends persist.

VI. STRUCTURAL DRIVERS IN THE CONTINENTAL OUTLOOK

25. The resilience and expansion of extremist actors across Africa are driven by structural factors that remain insufficiently addressed. Governance fragility is the foremost enabler of extremist penetration. Weak justice systems, inadequate service delivery, perceived predation by state actors, and the exclusion of peripheral communities create conditions in which armed groups can position themselves as alternative authorities.

26. Socio-economic pressures continue to produce large pools of individuals vulnerable to recruitment. Youth unemployment, lack of educational opportunities, and limited prospects for upward mobility generate frustration and susceptibility to extremist narratives. Climate change further compounds these pressures. Desertification, unpredictable rainfall, resource scarcity, and displacement undermine livelihoods and intensify competition over diminishing natural resources. Extremist groups exploit these stresses by inserting themselves as providers of access, adjudicators of disputes, or protectors of vulnerable communities.

27. Illicit economies provide crucial revenue streams for extremist actors. Artisanal mining, fuel trafficking, narcotics routes, illegal logging, wildlife poaching, human smuggling, and maritime piracy embed extremist groups within complex transnational supply chains. These networks create symbiotic relationships between criminal groups, corrupt officials, and armed movements, allowing extremist organizations to survive even when militarily pressured.

28. Kidnapping-for-ransom continues to undermine national and continental counter- terrorism frameworks. Recent ransom payments, including those issued for the release of Emirati nationals abducted in Mali, demonstrate the devastating impact of these financial flows. Such payments directly violate AU Assembly Decisions Assembly/AU/Dec.256 (XIII) (2009) and 311(XV) (2010), which both condemn and criminalize ransom payments to terrorist groups. The consequences are severe: ransom funds enable extremist groups to procure weapons, recruit combatants, consolidate territorial control, and influence local political economies. They also incentivize further kidnappings, creating a vicious cycle of insecurity. AUCTC's analysis reinforces the need for strict adherence to AU norms and proactive efforts to prevent ransom-based financing in 2026.

29. These structural drivers will shape the trajectory of African security in 2026, regardless of short-term military outcomes. Effective responses must therefore address governance deficits, socio-economic inequalities, environmental pressures, and criminal economies alongside traditional counter-terrorism measures.

VII. EMERGING TECHNOLOGIES, WEAPONIZED INFORMATION, AND THE DIGITAL BATTLEFIELD

30. Technological innovation has fundamentally transformed the operating environment for extremist groups. Drones are now used for reconnaissance, precision attacks, and psychological intimidation. Encrypted communication platforms enable decentralized command and rapid tactical adaptation. Online ecosystems—including AI-generated propaganda—allow extremist groups to manipulate narratives, challenge state legitimacy, polarize communities, and recruit across linguistic and geographical boundaries.

31. Crypto-enabled transactions and mobile-money systems facilitate clandestine financial flows that bypass traditional regulatory mechanisms. Extremist networks increasingly employ digital laundering techniques, including the use of privacy coins and layered transfers, complicating efforts to trace and disrupt their financing.

32. Throughout 2025, AUCTC CT-CEWS monitoring detected a marked increase in coordinated disinformation campaigns aimed at inflaming intercommunal tensions, eroding trust in state institutions, and disrupting electoral processes. The CISSA North Africa Regional Workshop on Disinformation and Fake News, held in Algiers on 20 April 2025, underscored the strategic danger posed by weaponized information. These operations are not peripheral propaganda exercises; they are central components of extremist strategy and will remain critical challenges in 2026.

33. Digital domains must therefore be treated as operational theatres, requiring integrated responses that combine forensics, regulation, strategic communication, and cross-border cooperation.

VIII. EARLY WARNING THEMES FOR 2026 AND HIGH-IMPACT HORIZON INDICATORS

34. As 2026 approaches, several high-impact indicators identified through the AU CTC's CT-CEWS monitoring platform require sustained vigilance. The most consequential is the risk of a partial takeover of Bamako, Mali, by a coalition of non-state armed groups. Should supply-line strangulation continue, institutional strain deepen, and internal political tensions persist, the capital could face unprecedented destabilization. This scenario, while not inevitable, represents one of the most significant risks to regional stability in years.

35. Burkina Faso faces escalating vulnerability as peripheral territories collapse, potentially exposing the capital to increased pressure. Coastal West Africa faces rising infiltration risks through forest corridors, artisanal mining belts, and cross-border ethnic networks. The Gulf of Guinea remains exposed to potential convergence between maritime criminal actors and extremist networks seeking new revenue streams.

36. AU CTC's analysis indicates that 2026 may witness the consolidation of a contiguous zone of extremist influence linking central Mali to northern Benin and western Niger, with spillover potential into Ghana and Nigeria's interior. Climate-driven displacement and food insecurity may generate additional recruitment pools in East and Central Africa, particularly among communities experiencing simultaneous livelihood loss and governance neglect.

37. 2026 will therefore be a decisive year requiring enhanced vigilance, strengthened multilateral coordination, and full deployment of continental early-warning capabilities linked to rapid early action.

IX. CONCLUSION

38. Africa stands at a strategic crossroads. The continent faces a terrorism landscape of unprecedented depth, complexity, and lethality. Yet the year under review also demonstrates that Africa possesses the leadership, the institutional foundations, and the analytical capabilities required to shape its own security trajectory. The AU CTC's integrated CT-CEWS platform has provided clear evidence of both the gravity of the threat and the pathways available to respond decisively.

39. The coming year will test the continent's ability to translate early warning into early action. The decisions taken by the Peace and Security Council and the AU Assembly in the coming months will determine whether Africa can reverse the trajectory of instability or whether extremist networks will consolidate further gains.

40. Strengthening governance structures, revitalizing political processes, promoting inclusive dialogue, reinforcing continental institutions, and ensuring adherence to AU decisions—particularly those addressing terrorist financing and ransom payments— will be essential.

41. Africa's greatest asset lies in its capacity to act collectively. If Member States pursue coordinated, governance-anchored, and development-focused strategies, supported by strengthened continental institutions and informed by robust early-warning systems, the continent can move decisively toward the peace and security vision outlined in Agenda 2063.