

PESTEL-S Risk Assessment: Sierra Leone Geopolitical and Socio-Economic Landscape (Q4 2025)

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Executive Summary: Strategic Risk and Opportunity Landscape

Sierra Leone currently presents a complex, high-risk, high-reward operating environment characterized by a significant disparity between its robust international diplomatic engagement and its precarious domestic institutional foundation. As of late 2025, the country maintains relative macro-level peace, evidenced by its ranking as the 5th most peaceful nation in Africa on the Global Peace Index (GPI)¹, yet it confronts critical challenges to political legitimacy following the contentious 2023 general elections.³ Systemic risks are primarily driven by severe debt distress⁴, high youth underemployment⁵, and an acute, rapidly evolving socio-health crisis rooted in the synthetic drug *Kush* epidemic.⁶ Political stability is critically dependent on the fragile political truce mediated by the Agreement for National Unity (ANU).³ Although

strict macroeconomic stabilization policies have successfully curtailed inflation in 2025⁴, governance indicators reflect persistent and profound weaknesses in the rule of law and anti-corruption safeguards, notably the removal of the Auditor-General.⁸ Economic growth remains heavily concentrated in volatile mineral exports, necessitating strategic policy adjustments to ensure sustainable, inclusive development and mitigate security risks associated with widespread youth marginalization.

1. Political Environment (P): Governance, Legitimacy, and International Roles

1.1. The Aftermath of the 2023 General Elections and Political Legitimacy

The political climate in late 2025 remains defined by the disputed June 2023 general elections, which resulted in President Julius Maada Bio securing re-election.³ The opposition All People's Congress (APC) contested the results, citing allegations of electoral fraud, which exacerbated deep ethnic and political divisions that persist across the country.⁹ These disputes necessitated intervention by regional bodies like the Economic Community of West African States (ECOWAS) and the African Union (AU), culminating in the Agreement for National Unity (ANU) in October 2023.³



The ANU was instrumental in maintaining post-election peace and established a roadmap for crucial electoral reforms.⁸ However, analysis indicates that the effectiveness of this agreement hinges on implementation, which remained pending as of late 2024, with consensus on details still sought.⁸ While President Bio received a report on the independent review of the Electoral Commission for Sierra Leone (ECSL) in June 2025¹⁰, delays in achieving full

consensus on and implementation of transparent electoral mechanisms suggest that the current stability is more a tactical truce than a structural political resolution. The slow progress on electoral reform threatens to compound the legitimacy crisis of the 2023 results, increasing the potential for future unrest.

The fragility of elite political stability was further demonstrated by the charging of former President Ernest Bai Koroma with treason in January 2024 for his alleged involvement in the failed November 2023 coup attempt.⁸ His subsequent release to Nigeria, brokered by ECOWAS, underscores the vital, albeit reactive, role regional bodies play in managing Sierra Leone's domestic political crises.⁸ The critical dependency on the ANU's success means that Sierra Leone's political risk remains highly sensitive to

implementation deadlines, necessitating sustained engagement by international partners to verify and accelerate structural reforms.

1.2. Governance Indicators and Stability Assessment

Sierra Leone's governance profile is weak, characterized by institutional fragility and pervasive corruption risks. Freedom House classifies the country as **Partly Free**, with a Global Freedom Score of 59/100 in 2025.⁸ The Bertelsmann Stiftung's BTI categorized the country's democracy status as **Flawed** in 2024, reporting a Governance Index Score of 4.67.⁸

The Worldwide Governance Indicators (WGI) highlight specific institutional deficits (2023 data):

- **Control of Corruption:** The Percentile Rank was critically low at 31.13%⁸, corresponding directly with a Freedom House score of **1/4** for the strength and effectiveness of safeguards against official corruption.⁸
- **Rule of Law:** The Percentile Rank stood at 22.16%⁸, confirming significant legal and procedural uncertainty.
- **Government Effectiveness:** This index was low, ranking at 12.26% Percentile Rank⁸, reflecting poor administrative capacity and inefficient resource utilization.

Furthermore, a deterioration in executive oversight was noted in 2025. Freedom House downgraded the score for government openness and transparency (C3) from 3 to **2/4**.⁸ This reduction was directly attributed to the controversial, politically charged removal of the respected Auditor-General, Lara Taylor-Pearce, and her deputy in December 2024.⁸ This action, taken despite criticism from international and domestic experts regarding the process's credibility, demonstrates a significant setback for institutional accountability. This behavior signals an executive willingness to neutralize oversight bodies that expose financial malfeasance, structurally validating the low WGI Control of Corruption ranking.

1.3. Diplomatic Positioning and Regional Leadership

The Bio administration has successfully leveraged high-profile international and regional roles to enhance its legitimacy and secure geopolitical relevance, particularly in the context of an unstable West Africa.

President Julius Maada Bio used his platform at the UN General Assembly (UNGA 80, likely succeeding the 78th session) in September 2025 to project Sierra Leone as a proponent of multilateral reform.¹¹ He called for a "braver UN" and emphasized the need to "reimagine multilateralism" to transform promises into realities of peace and equality.¹¹

Crucially, President Bio outlined his regional leadership priorities as the Chair of ECOWAS and Coordinator of the African Union Committee of Ten (C-10) on Security Council Reform.¹² These

priorities include defending democracy, countering terrorism, strengthening integration, and advancing Africa's voice globally.¹² Sierra Leone's diplomatic standing is further cemented by its rotating Security Council presidency in 2025¹³ and its contribution to regional stabilization efforts, such as in the eastern Democratic Republic of the Congo.¹¹ This strategy of assuming high-profile regional and global roles strategically enhances the country's international credibility, securing continued external financing and providing a diplomatic buffer against domestic governance criticism. This tactic seeks to decouple foreign policy alignment from negative trends observed in institutional efficacy and rule of law.

Table 1.1: Political and Governance Index Comparison (2023-2025)

Index/Metric	2023 Value/Status	2024/2025 Status	Trend	Significance
Global Freedom Score (FH)	60/100 (2024)	59/100 (Partly Free, 2025) ⁸	Slight Decline	Persistent constraints on civil liberties and political rights.
Political Stability Rank (WGI Percentile)	37.44% (2023) ⁸	N/A (Projected Sensitive)	Sensitive	Moderate underlying risk of political violence and domestic unrest.
Control of Corruption (WGI Percentile)	31.13% (2023) ⁸	N/A (Low)	Stagnant/Low	High systemic corruption risk, hindering effective policy implementation.
Anti-Corruption Safeguards (FH C2)	1/4 ⁸	1/4 ⁸	Critically Low	Indicates formal oversight mechanisms are ineffective or politically constrained.
Global Peace	1.993 (2024) ²	1.887 (2025) ²	Improving	Relative domestic

Index Score				tranquility despite political turbulence.
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2. Economic Environment (E): Macro Trends and Investment Dynamics

The economy in late 2025 is stabilized by tightened fiscal and monetary policy, achieving a temporary respite from high inflation, but long-term stability is fundamentally precarious due to severe debt distress and structural commodity dependence.

2.1. Macroeconomic Stabilization and Fiscal Vulnerability

Monetary policy tightening successfully countered the high inflation observed in 2023 (46.6%).⁵ Driven by a tight policy stance and declining global commodity prices, inflationary pressures eased throughout 2024, reaching 5.4% by September 2025.⁴ Concurrently, the exchange rate stabilized.¹⁵ While this policy-induced stability is remarkable, the IMF projects the average annual consumer price change for 2025 at 9.4%,¹⁶ suggesting underlying inflationary pressure persists.

Fiscal vulnerability remains the most critical macroeconomic concern. Public debt is officially rated at a **high risk of distress**.⁴ While the public debt-to-GDP ratio decreased slightly to 90.5% in 2023,⁵ high external debt servicing costs have led to a worsening of the country's foreign reserves position.⁴ Domestic debt costs decreased sharply from 41% to 16% between April and September 2025, largely due to reduced government borrowing.⁴ This high-risk debt profile means that the current stability is fragile; any deviation from the tight fiscal stance or political instability that impacts confidence could immediately trigger a renewed currency crisis and high risk of debt default.

2.2. Drivers of Growth: Mineral Exports and Socioeconomic Exclusion

Real GDP growth is projected to accelerate robustly in 2025, driven primarily by the extractive sector. Growth is forecasted between 4.4% (IMF) and 5.2% (AfDB)⁵, fueled by iron ore production and recovery in agriculture and other sectors.⁵ Sierra Leone possesses extensive mineral reserves, including iron ore, diamonds, gold, rutile, lithium, and bauxite¹⁵, making mining the main engine of growth.⁵ However, this dependence drives economic volatility.³

The economic model is failing to translate mineral wealth into inclusive opportunity. Most of the population is engaged in subsistence agriculture³, which accounts for 43% of employment.¹⁸ Official youth unemployment was 10% in 2022, but underemployment is substantially higher.⁵ With the extreme poverty rate at 25% in 2023⁵, the capital-intensive mineral sector cannot absorb the large, marginalized youth demographic. This economic exclusion represents an unmanaged social liability, fueling security threats such as organized crime and the Kush crisis.⁶ Sustainable growth necessitates a policy shift toward private sector reform and labor-intensive value addition.

Table 2.2: Key Macroeconomic Indicators (2023-2025 Forecast)

Indicator	2023 Actual	2025 Projection (IMF/AfDB)	Change/Trend
Real GDP Growth (%)	2.6 ⁵	4.4 - 5.2 ⁵	Strong Improvement (Mining/Agriculture Recovery)
Inflation (YoY %)	46.6 ⁵	9.4 (Avg) / 5.4 (Sept 2025) ⁴	Sharp Decline (Policy Tightening)
Public Debt-to-GDP Ratio (%)	90.5 ⁵	High Risk of Distress ⁴	Persistent Vulnerability
Domestic Borrowing Cost (T-Bill)	High	16% (Sept 2025) ⁴	Significant Reduction
Gross Foreign Reserves (Months Import Cover)	3 months (Oct 2023) ⁵	Worsening ⁴	Declining (Due to high external debt service)

2.3. Strategic Outlook for Foreign Investors

Sierra Leone offers substantial investment potential, particularly in critical minerals and infrastructure, but requires mitigation of high institutional risk.

- **Opportunities:** Opportunities are abundant across critical minerals (lithium, rutile), infrastructure (PPPs in energy, water, telecommunications), and agriculture.¹⁵ Investors benefit from incentives such as tax holidays and duty exemptions, along with preferential access to major markets via the Mano River Union, ECOWAS (over 350 million consumers), and the African Continental Free

Trade Agreement (AfCFTA).¹⁵

- **Risks:** The primary constraints are related to weak governance, particularly in rule of law and dispute resolution.¹⁵ Foreign investors report that the judicial application of laws is often subject to financial and political influence, which complicates navigating bureaucratic and regulatory processes.¹⁵ Concerns regarding the lack of public transparency in anti-corruption efforts⁸ and the growing need for rigorous ESG compliance in the extractive sectors intensify due diligence requirements.¹⁷
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3. Social Environment (S): Development, Cohesion, and the Kush Crisis

3.1. Human Development Status and Access to Basic Services

Sierra Leone's structural developmental challenges are profound, reflected in its ranking of **185th out of 193 countries** on the United Nations Human Development Index (HDI).²⁰ This classification highlights severe deficits across health, education, and income parameters.²¹

Healthcare access is limited, contributing to high mortality rates from vector-borne and waterborne diseases like malaria, dengue, and diarrhea, compounded by inadequate water and sanitation infrastructure.¹⁸ Climate change impacts, such as heat stress, further reduce labor productivity and exacerbate health risks.¹⁸ Adolescent reproductive health remains a critical concern, with an adolescent birth rate of 101 per 1000 girls aged 15–19 years.⁷

3.2. Inter-Ethnic Relations and Public Perception of Governance

Social cohesion is threatened by rising political polarization that has internalized along ethnic lines. Interpersonal trust is notably low; only 48% of Sierra Leoneans reported trusting people from other ethnic groups in 2025, a figure that has declined since 2022.²³

A more acute metric of polarization is the perception of unfairness: **69% of citizens reported feeling their ethnic group was treated unfairly in 2025**, an increase of 8 percentage points since 2022.²³ This rise in identity-based grievance demonstrates that the highly contested political environment has reinforced deep societal cleavages.⁹ This political segmentation significantly increases the country's vulnerability to mobilization and unrest, undermining decades of post-conflict reconciliation work.

3.3. The Kush Epidemic: Social and Health Catastrophe

The use of *Kush*, a synthetic drug containing potent nitazenes (opioids) and cannabinoids, is a declared national emergency (since April 2024) and is the most pervasive internal threat to human security.⁶ Sierra Leone is the regional epicenter, with the drug believed to have killed thousands and fueling a crisis across West Africa.⁶ The drug's precursor chemicals or finished products are sourced internationally, including from China and Europe (Netherlands, UK).⁶

The crisis primarily affects youth, driving socioeconomic harms, crime, and dropout rates from education and employment.¹⁹ Furthermore, Kush addiction has created a dangerous public health syndemic. It fuels transactional sex and risky behaviors, dramatically increasing vulnerability to HIV, STIs, exploitation, and gender-based violence (SGBV).⁷ The addiction disrupts engagement with healthcare services, leading to poor maternal and child health outcomes.²²

A National Task Force has been established¹⁹, but the response must integrate robust public health and harm reduction strategies, including access to treatment, opiate substitution, and naloxone for overdose reversal, coupled with legislative reforms to offer alternatives to incarceration for Persons Who Use Drugs (PWUD).²⁴ The scale of this crisis reflects the profound failure to provide viable economic pathways for marginalized youth, leaving them vulnerable to organized crime networks.⁵

4. Technological Environment (T): Digital Divide and E-Governance Readiness

4.1. Digital Infrastructure and Connectivity Landscape

Sierra Leone exhibits a significant digital disparity. Cellular mobile connections are near-universal, reaching 8.66 million active connections, or 99.2% of the population, in early 2025.²⁶ However, internet penetration is low, with only 1.80 million users, representing 20.7% of the population.²⁶ This digital divide limits the accessibility of advanced digital services outside core urban areas.

4.2. E-Governance Implementation and AI Readiness

The government, supported by the World Bank's \$50 million Sierra Leone Digital Transformation Project (SLDTP), is pushing for digitalization.²⁷ Since late 2023, the SLDTP has connected 50 government MDAs, boosting service delivery capacity.²⁷

In a forward-looking step, the Ministry of Communication, Technology, and Innovation, in partnership

with the World Bank, launched an Artificial Intelligence (AI) Readiness Assessment in late 2025.²⁷ The assessment evaluates infrastructure (Compute), skills (Capacity), and policy (Context) to develop a National AI Strategy focused on solving national challenges.²⁷

However, the expansion of digital capacity carries inherent political risks. Low government transparency (C3 score 2/4) and constraints on media freedom (D1 score 2/4)⁸ are compounded by the existence of the 2021 Cyber Security and Crime Act (CSCA), which has been used to detain critics for online speech.⁸ This demonstrates that without robust regulatory safeguards, new technologies risk becoming instruments for political repression and surveillance, thereby eroding civil liberties rather than promoting inclusive governance.

5. Environmental Environment (E): Climate Vulnerability and Food Systems

5.1. Climate Change Risks: Flooding, Heat Stress, and Deforestation

Sierra Leone is extremely vulnerable to climate change impacts, including recurrent flooding, landslides, and high heat stress.¹⁸ The Environmental Performance Index (EPI) score, while showing a modest improvement to 39.7 in 2024²⁹, still reflects significant ongoing environmental degradation.

Climate impacts directly jeopardize the economy and human health. Heat stress impairs labor productivity, particularly in the agriculture sector (43% of employment), and increases the incidence of vector-borne and diarrheal diseases.¹⁸ Climate variability affects precipitation and increases erosion, threatening crop and livestock production.¹⁸

5.2. Chronic Food Insecurity and Agricultural Adaptation Strategies

Food insecurity is structural and chronic, affecting the majority of the population due to climate shocks and economic instability.³⁰ The government's "**Feed Salone Strategy**" is aimed at addressing these structural drivers, supported by partners like the WFP.³⁰ Strategic interventions include scaling up the home-grown school feeding program, supporting smallholder farmers, and promoting rural women's economic empowerment within food value chains.³⁰

Environmental decay and climate-induced hardship are directly linked to security risks, as they lead to displacement and economic distress that fuels irregular migration and human smuggling.²⁸ Stabilizing the food system and mitigating climate impacts are therefore crucial components of national security.

6. Legal Environment (L): Rule of Law, Integrity, and Civil Liberties

6.1. Judicial Integrity and Rule of Law Assessment

The integrity of the justice system is severely undermined by political and financial influence. The WGI Rule of Law Percentile Rank is extremely low (22.16% in 2023)⁸, and Freedom House scores for the Independence of the Judiciary (F1) and Due Process (F2) are both **2/4**.⁸ Investors note that judicial application of laws is often subject to influence, creating operational risk and reliance on international arbitration.¹⁵

Recent legal reforms include the new **Criminal Procedure Act** (signed September 2024), which seeks to reduce backlogs and corruption by eliminating jury trials and imposing time limits on pretrial detention.⁸ However, concentrating judicial power within an already politicized system carries the risk of selective application of justice. The **Prohibition of Child Marriage Act** (signed July 2024) is a significant advancement for personal rights.⁸

6.2. Anti-Corruption Measures and Institutional Integrity

Safeguards against official corruption (C2) are critically ineffective, scoring **1/4**.⁸ This failure was underscored by the controversial removal of the respected Auditor-General in December 2024⁸, an act that signals that the executive sphere prioritizes neutralizing oversight over promoting transparency. The confidentiality surrounding legally required asset declarations for public officials confirms that the current anti-corruption framework serves external compliance rather than genuine public accountability.⁸ This institutional vandalism increases fiduciary risk and confirms a structural collapse of accountability in late 2025.

7. Security Environment (S): Domestic Threats and Regional Architecture

7.1. Domestic Security Risks and Political Unrest Potential

Sierra Leone's high ranking on the Global Peace Index (5th most peaceful in Africa in 2025)¹ reflects relative peace from large-scale conflict. Yet, the Fragile States Index (FSI average 88.74 points)³³ indicates significant underlying structural risks. Domestic security is threatened by the potential for youth-led protests stemming from grievances over corruption and marginalization.³⁴ The organized crime complex, driven by drug trafficking and the Kush crisis, is rapidly eroding human security and state integrity from within.⁶

7.2. Organized Crime and Transnational Trafficking

Sierra Leone functions as a transshipment point for international drug trafficking and is prone to pervasive money laundering.²⁵ Human trafficking and migrant smuggling are intensifying, fueled by economic hardship, climate displacement, and high youth unemployment.²⁸ Victims are trafficked both domestically and internationally, notably to Western Asia.²⁸ Corruption and official complicity enable these organized crime networks.²⁸ Despite government efforts, the lack of victim services and inadequate prosecution of traffickers remain critical response gaps.³⁵

7.3. Sierra Leone's Position in West African Security Architecture

The regional security landscape is destabilized by the formal withdrawal of Burkina Faso, Mali, and Niger from ECOWAS in January 2025.³⁶ This fragmentation severely limits collective security response capabilities and increases the geopolitical risk for coastal states, including the potential spillover of militant and TOC activity.³⁶ While Sierra Leone actively leads ECOWAS and maintains bilateral security MoUs with Guinea and Liberia³¹, the unresolved territorial dispute over Yenga with Guinea remains a latent risk factor.¹⁵ The country's security posture must adapt to the complex, non-state internal threats exacerbated by regional instability.

Conclusions and Strategic Recommendations

Sierra Leone presents a complex operational dilemma where high geopolitical engagement is fundamentally threatened by systemic domestic institutional fragility. The political truce is fragile, relying on the implementation of electoral reforms yet to be fully realized. Macroeconomic stability is precarious, constrained by severe debt exposure. The Kush crisis represents an escalating security and health catastrophe rooted in youth marginalization and enabled by TOC activity and institutional weakness.

Strategic Recommendations

1. **Prioritize Political Risk Mitigation and Accountability:** External financial support should be explicitly conditioned upon the full, transparent implementation of the ANU electoral reform roadmap and the immediate restoration of the independence and authority of key oversight institutions, notably the Audit Service Sierra Leone (ASSL), to address severe fiduciary risk.⁸
2. **Shift Focus to Inclusive Economic Growth:** Development and investment capital must be channeled toward projects—such as infrastructure PPPs and agribusiness value addition—that address high youth underemployment and foster sustainable economic models beyond volatility-prone mineral extraction.⁵
3. **Implement a Multi-Sectoral Security Response to Kush:** The Kush crisis must be addressed as a combined security, health, and development emergency. This requires simultaneous action on two fronts: comprehensive public health interventions (treatment, harm reduction, naloxone access²⁴) and enhanced international law enforcement cooperation focused on disrupting the supply chains of synthetic opioids from source jurisdictions (e.g., China, Netherlands).⁶
4. **Strengthen Climate and Human Security Resilience:** Investment in climate adaptation measures (e.g., flood defenses, agricultural research) is necessary to mitigate the economic hardship and displacement that currently fuel transnational organized crime and human trafficking.¹⁸
5. **Mitigate Judicial Integrity Risk:** Foreign investors should structure deals to rely primarily on international arbitration mechanisms¹⁵ due to the demonstrated vulnerability of the domestic judiciary to political and financial influence. Rigorous due diligence in all sectors must account for the severely low ranking of anti-corruption safeguards.

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