Global Power Shifts

Alternative Scenarios

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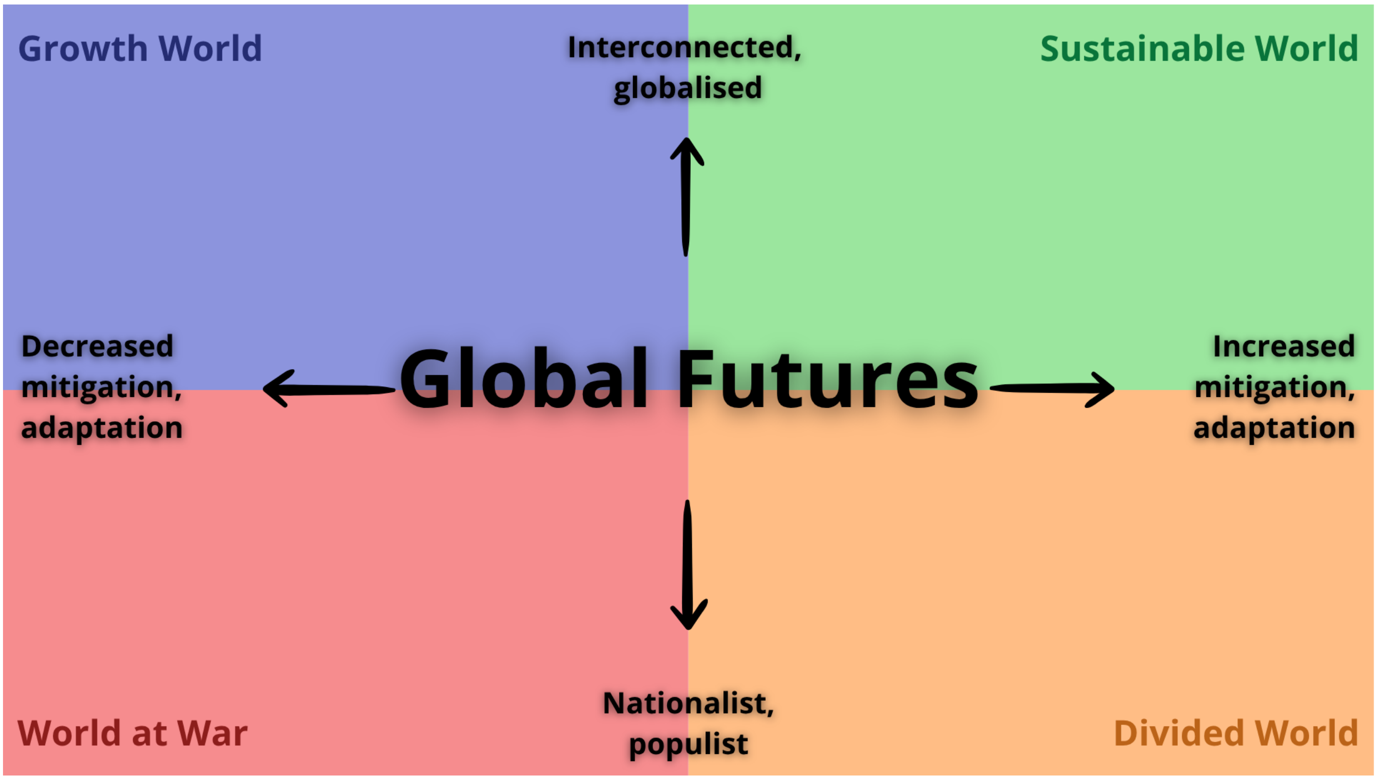
Alternative Scenarios

The future distribution of national power and geopolitical influence will depend not only on countries' underlying capabilities, but also on the global conditions within which those capabilities develop and are exercised. We therefore compare the power and influence measures discussed above across four alternative global futures: a Sustainable World, a Growth World, a Divided World and a World at War. The framing uses two key dimensions representing fundamental, highly uncertain forces shaping the international system, each with significant implications for development, geopolitics and environmental resilience, as depicted in Chart 2. The extent of globalisation (vertical axis) captures the degree to which countries and regions remain interconnected through trade, technology and cooperation—or shift towards fragmentation and regionalism. The pursuit of sustainability (horizontal axis) prioritises equitable growth, environmental stewardship and long-term resource management over unchecked exploitation and short-term gains.

Chart 2: Dimensions and scenarios

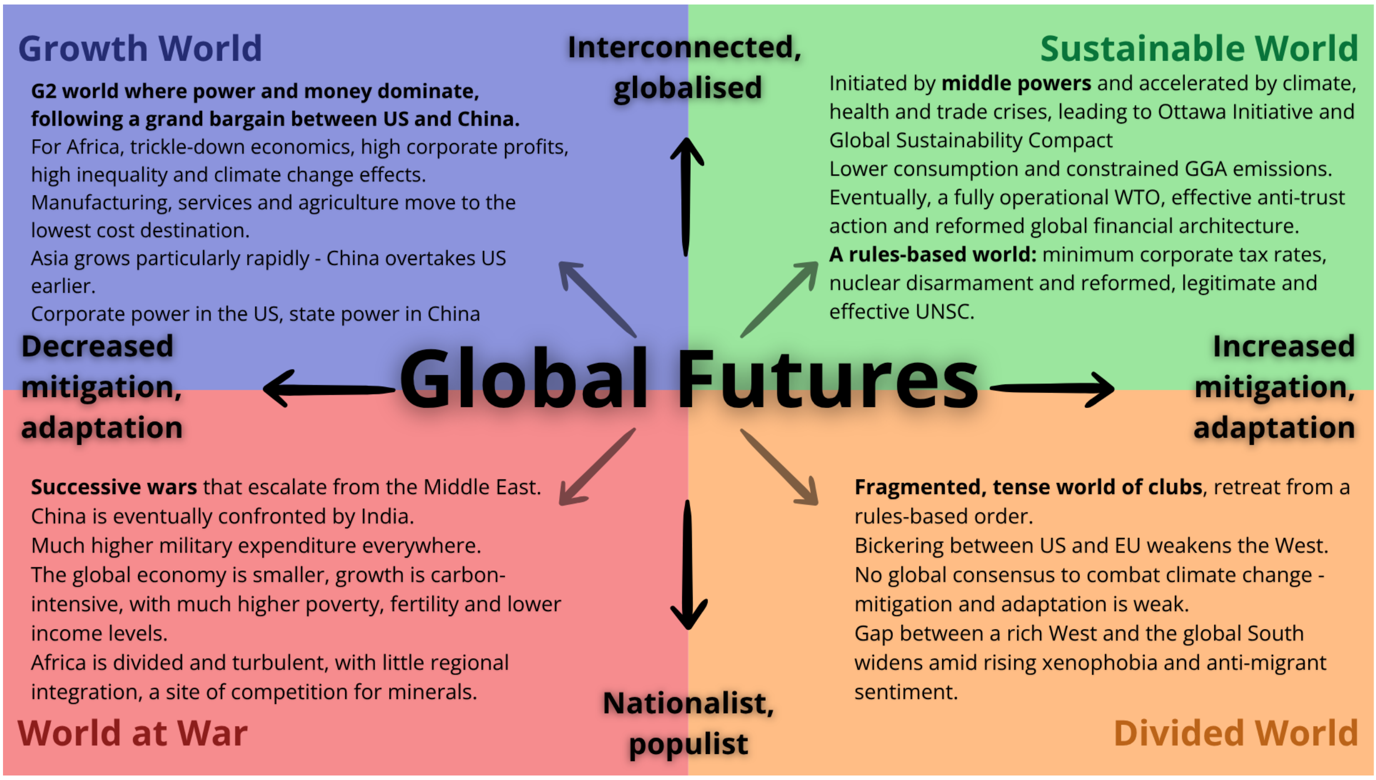


Since they are illustrative, no scenario seeks to present the current global trajectory, which would inevitably fall somewhere between the four stylised futures, but is currently closest to the Divided World scenario.

Scenarios are not predictions. They are tools that help frame alternative futures systematically and enable coherent discussion and analysis. Scenarios conducted using the traditional two-dimensional analysis—in this case, the extent of global fracturing versus efforts at sustainability—yield four divergent alternatives that support the associated modelling and conceptualisation. Reality is typically more complex and often ends up somewhere in between. Done well, however, scenarios surface structural trends and the outcomes or effects of different possible pathways.

Chart 3 below presents the key characteristics of the four alternative global scenarios.

Chart 3: Alternative global scenarios



Details on the interventions in IFs for each scenario, as well as the composition of the indices used, are available on the technical page.

In a Sustainable World scenario, the world's governments and their people prioritise sustainability and equity, but the road is long as the positive outcome is built by middle powers. For Africa, it assumes rapid and ambitious regional integration, progressing from an African continental free trade area, then a customs union and eventually a common market that allows the free movement of capital, labour and services across most countries. In this world, Africa progresses as outlined in the Combined scenario on this website, marked by steady gains in productivity, accountability, democracy and stability. The Sustainable World maximises economic growth, achieving a 2050 global economy of US$231 trillion (compared to US$110 trillion in 2025), improves income and reduces poverty. However, it is the most difficult to attain given its focus on multilateralism, environmental sustainability and equity.

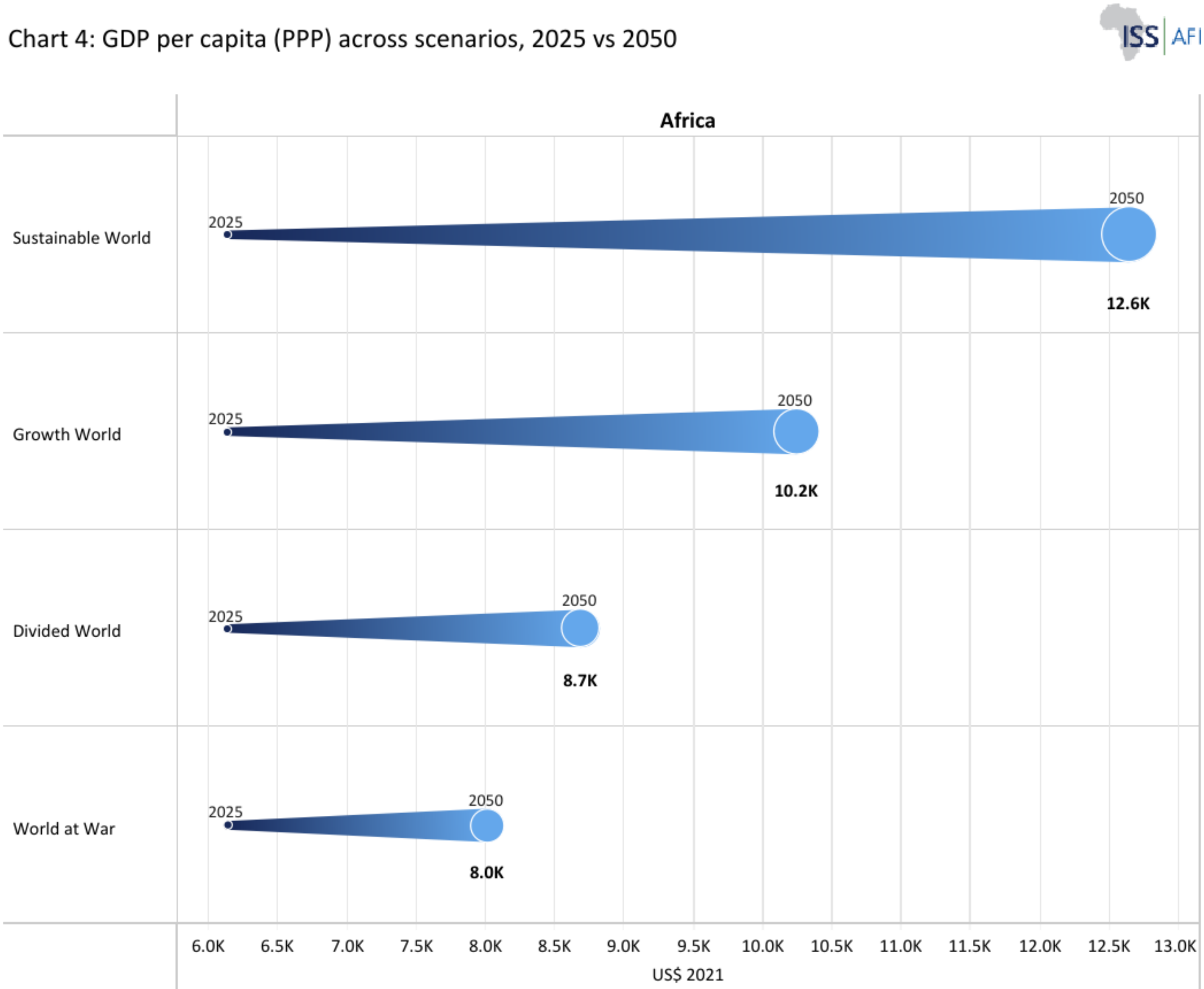
In a Growth World scenario, countries focus on rapid improvements in income and returns on investment, eschewing environmental concerns, within the context of a grand bargain between the US and China, often referred to as a G2 world. Commercial and trade interests dominate, and by 2050, the world economy will be roughly the same size as forecast in the Sustainable World scenario. Still, relative to 2025, the Growth World will release 10% more CO_2 from fossil fuels, while the Sustainable World will release nearly 20% less—another indicator of the differences between these two futures. The Growth World leads to impressive economic results, but at the expense of equality and efforts to contain global greenhouse gas emissions, resulting in negative climate change impacts, slower reductions in extreme poverty and increased inequality. The Growth World will have 315 million more extremely poor people (those living on less than US$3.00 per day) than the Sustainable World by 2050, most of whom will be in sub-Saharan Africa.

In a Divided World scenario, the future is characterised by global fracturing, populism, nationalism and a retreat from globalisation—effectively, the fraying of the rules-based system as we know it, with its complex lattice of norms and institutions. Everyone seems to be angry, selfish and unhappy and xenophobia and anti-migrant sentiment increase as rates of migration accelerate. National and competitive interests dominate in Africa as bickering and beggar-thyneighbour policies escalate, despite some sub-regional trade integration. In Europe and the Indo-Pacific, several previously non-nuclear states are building nuclear arsenals. Economic growth is tepid, and poverty reduction is slow. By 2050, the size of the world economy is US$186 trillion, roughly 20% smaller than in the Sustainable and Growth World scenarios.

Finally, in a World at War scenario, competition between the US and China dominates all aspects of the global economy, politics and relations, leading to violent outcomes. Rather than a single war, this is a story of successive conflicts originating in the Middle East. Similar to the Divided World, several states join the nuclear weapons club, while existing nuclear powers also substantially increase the size of their arsenals. Shut out of the prospects for more rapid development, Africans suffer. Poverty increases when economic growth is insufficient to raise incomes, given the more rapid population growth typically associated with instability. The World at War scenario is the worst case for everyone, as overall gains are lower than in any other scenario. Autocracy spreads, and those African countries that avoid fracturing grow slowly, constrained by their small domestic markets and without the advantages of trade integration. The World at War scenario results in a much smaller world economy at US$152 trillion in 2050, with Africa growing particularly slowly despite its much larger population.

To compare these worlds side by side in terms of economic development, as measured by GDP per capita at purchasing power parity, the global average rises from US$20.6K in 2025 to US$32.4K by 2050 in a Sustainable World and US$31.9K in a Growth World. This is the rough equivalent of the world advancing from Azerbaijan's or Thailand's current living standards to those of Bulgaria's or Malaysia's—a jump of roughly 20 positions in the global GDP per capita rankings. By contrast, a Divided World sees half as much improvement, growing to US$26.6K by 2050, the approximate GDP per capita levels of Argentina and Belarus today and jumping roughly 15 positions in the present-day global rankings. A World at War shows almost no growth, moving just three or four positions in today’s global GDP per capita rankings to levels around those of the Maldives or Mexico.

Chart 4: GDP per capita (PPP) across scenarios, 2025 vs 2050



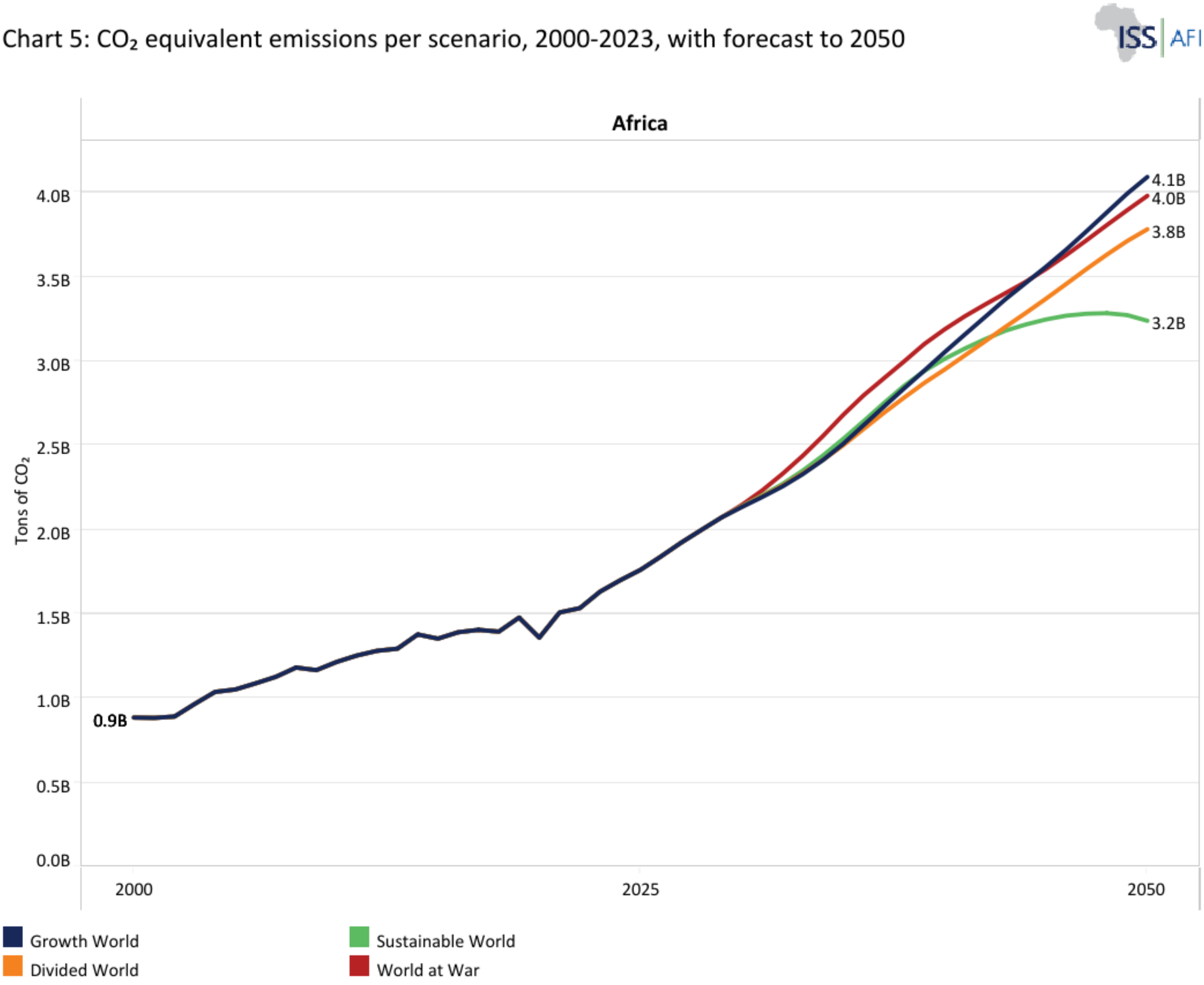
Source: IFs 8.72 initialising from WDI data

In a World at War, basic provisions improve for many households, but not nearly as much as in the other, more optimistic future forecasts. For example, global access to safely managed sanitation increases by just over five percentage points by 2050 relative to 2025, even with a World at War due to enduring trends advancing global development. But in a Sustainable or Growth World, that percentage-point increase is more than double by 2050, when more than 7 of every 10 individuals worldwide (71%) have access to safely managed sanitation. A Divided World approaches a similar level of growth, with access growing to 68%.

The pathways to these worlds are, of course, very different. In particular, while a Sustainable World and a Growth World lead to similar levels of development, in the former, global annual carbon dioxide emissions from fossil fuels decline from 37.0 billion tons in 2025 to roughly 29.9 billion tons in 2050 and are on track to decline further in the decades that follow. By contrast, fossil fuel-based emissions increase to 40.7 billion tons by 2050 in a Growth World, with only modest declines thereafter expected. Such a trajectory would place the world dangerously close to climate tipping points, including the extinction of coral reefs and other bellwether species and the collapse of glaciers and permafrost, which would accelerate climate change further.[x] The International Panel on Climate Change (IPCC) now consistently warns of compound and cascading risks, in which climate hazards interact with rapid population growth, urbanisation, weak governance, water scarcity and conflict, and that the combined effects are more important than any individual hazard, such as heat stress, water scarcity or agricultural loss. This is particularly relevant to Africa, which is at particular risk. We examine these trends in a separate Climate theme.

Chart 5 presents carbon emissions from fossil fuels for different regions, including Africa. Coming from a very low base, Africa accounted for less than 5% of global fossil fuel carbon emissions in 2025. By 2050, absolute amounts of carbon emissions are highest in the Growth scenario and lowest in the Sustainable scenario. Only in the more carbon-intensive World at War scenario does Africa's carbon emissions exceed 10% of the global total.

Chart 5: CO_2 equivalent emissions per scenario, 2000-2023, with forecast to 2050



Source: IFs 8.72 initialsing from CDIAC at APPSTATE data

The Divided World, and especially the World at War, will be more militarised than 2025, a year that was itself not particularly peaceful. In the first of these scenarios, global military spending as a percentage of GDP rises from 2.2% in 2025 to 2.8% within a decade before declining to 2.4% by 2050. In the second, a World at War, global military spending rises to 6.2% of GDP—nearly triple today's level and the highest since the early years of the Cold War. In the other two scenarios, global military spending shrinks to 1.8% (Growth World) and 1.7% (Sustainable World) of GDP by 2050, levels lower than at any time in the past 65 years.

Militarisation will go hand in hand with a retreat from democracy, though for different specific underlying drivers – the former involving an increase in the threat of conflict and increases in military spending, the latter involving less government attention toward and individual satisfaction with government service provision and inclusion—under a unifying logic of more nationalist political rhetoric and associated policies. In a World at War, the democratic backslide of recent years worsens, with the global average level of electoral democracy falling by 2050 to its lowest level since the late Cold War—that is, the period *before* the democracy wave of the 1990s. A Divided World sees somewhat higher levels of participatory electoral democracy, with the present-day backslide persisting but not worsening. In a Growth World, the democratic backslide reverses, with the world returning to the historical high seen in the late 2000s to early 2010s. Democracy expands further in a Sustainable World than at any point in history.

Cite this research

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About the authors

Dr Jakkie Cilliers is the founder and former executive director of the ISS. He currently serves as chair of the ISS Board of Trustees, head of the African Futures and Innovation (AFI) programme at the Institute's Pretoria office, and an extraordinary professor at the University of Pretoria. His 2017 best-seller Fate of the Nation addresses South Africa's future from political, economic and social perspectives. His four most recent books, Africa First! Igniting a Growth Revolution (March 2020), The Future of Africa: Challenges and Opportunities (April 2021), Africa Tomorrow: Pathways to Prosperity (June 2022) and *Africa's Road to Prosperity: 10 Things to Know* (July 2026) offer rigorous analyses of the continent as a whole. From August to December 2025, Cilliers was a Richard von Weizsäcker Fellow at the Robert Bosch Academy in Berlin, during which he worked on *Africa's Road to Prosperity*

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