Global Power Shifts

Projected Shifts in Global Power and Influence through 2050

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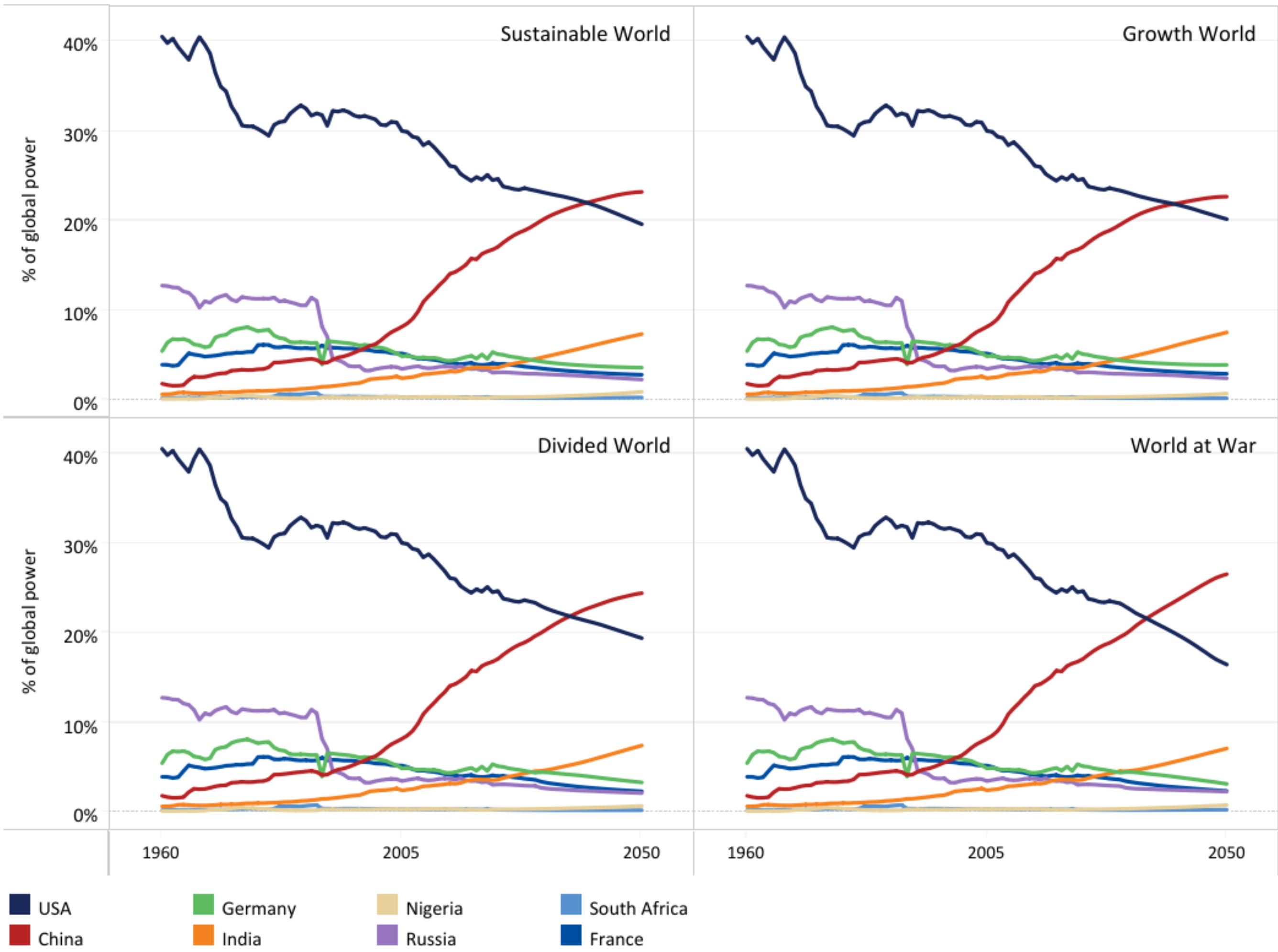
While IFs provides forecasts for 188 countries, for this analysis we focus on: a) countries which are forecast to be the most powerful around mid-century (the US, China and (a much less powerful) India—a country which has historically featured heavily in geopolitics), b) Russia, c) one potential country group of geopolitical import, when it acts in unison: the European Union (EU), and d) a combined African Union (AU).

Chart 6: Global Power Index per scenario, 1960 to 2023, with forecast to 2050

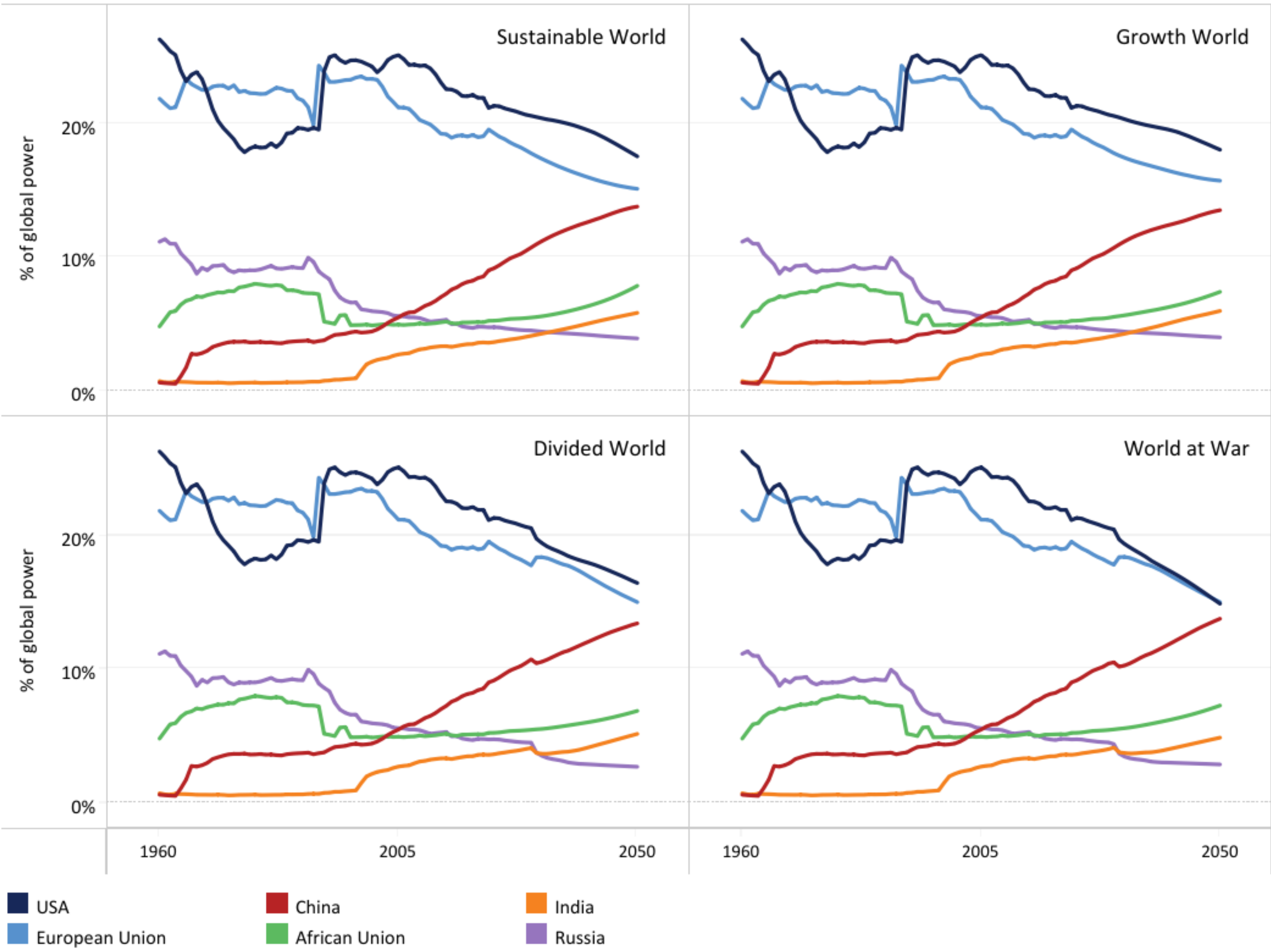


Source: IFs 8.72 Global Power Index data

At the top of the global power potential hierarchy remain the US and China, with China's power converging toward the US' s power across all scenarios and both the GPI and DiME Index measures. In a World at War scenario, the US suffers greater relative losses—a product of restrictive immigration, a prematurely shrinking US population and thus a much less productive economy—leading to China passing the US as the world's leading power, as measured by the GPI, by 2035. In a Sustainable or Growth World scenario, this great power transition is delayed until 2040. The Divided World splits the middle with a transition around 2037.

Forecasts of the DiME Index paint a less rosy picture for China, where it does not pass the US as the world's leading power before mid-century. The effects across scenarios are similar to the GPI in direction; however, a Sustainable or Growth World would be most beneficial for US national power potential. At the same time, a World at War would be harmful to its status—an irony given recent turmoil in the Middle East fomented by US military strikes and, as of this writing, its latest war of choice (Iran) in that region.

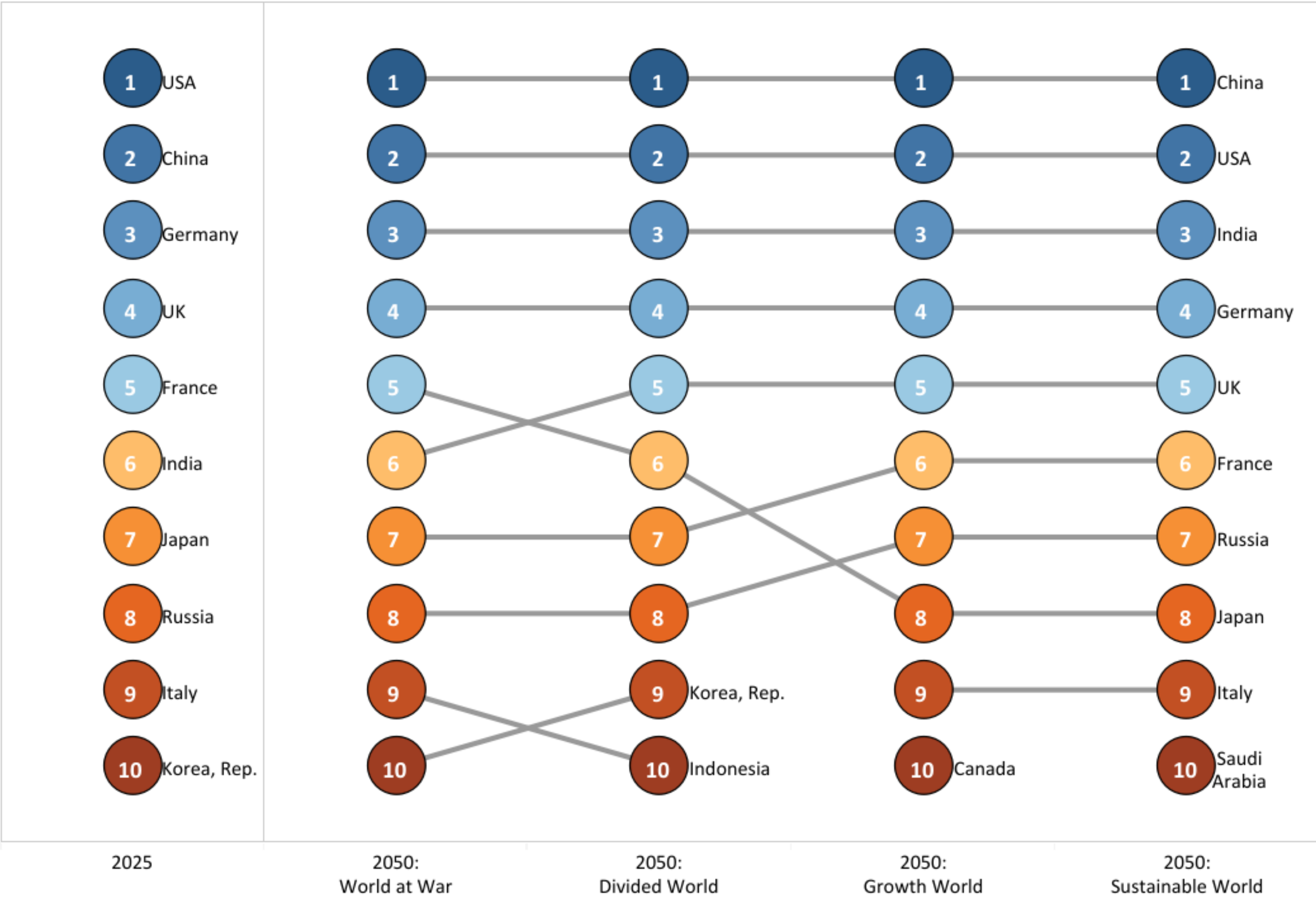
Chart 7: DiME Index per scenario, 1960 to 2023, with forecast to 2050



Source: IFs 8.72 initialising from Diplometrics, SIPRI, FAS and WDI data

Chart 8: Top ten countries ranked in 2025 and 2050 forecast in the GPI and DiME index per scenario

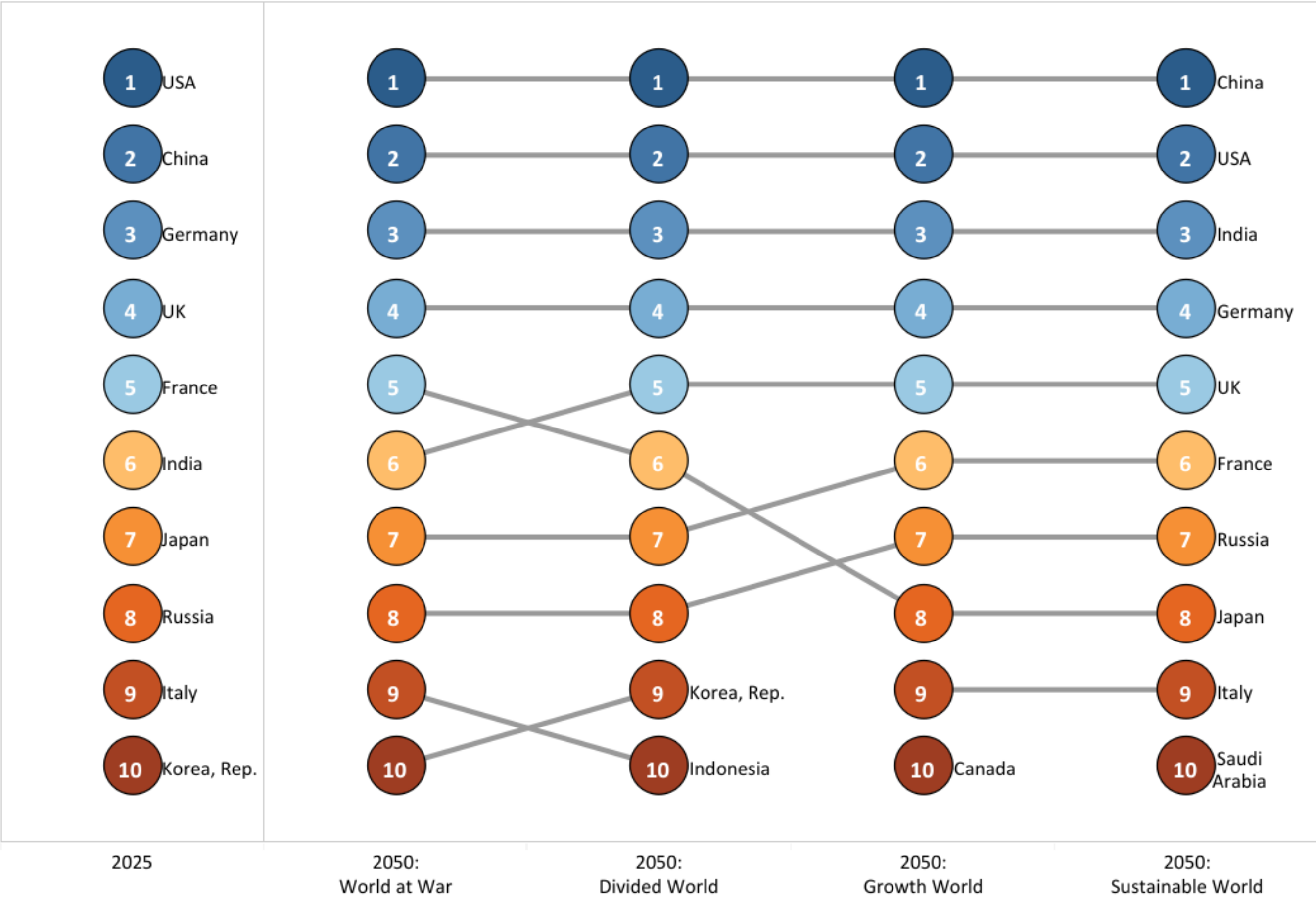
GPI



Source: IFs 8.72 initialising from Diplometrics, SIPRI, FAS and WDI data, and IFs 8.72 GPI data

Chart 8: Top ten countries ranked in 2025 and 2050 forecast in the GPI and DiME index per scenario

GPI



Source: IFs 8.72 initialising from Diplometrics, SIPRI, FAS and WDI data, and IFs 8.72 GPI data

Across measures and scenarios, the very top of the global hierarchy is relatively stable, with the US, China and India holding the top three spots. Here, the US and China lead an enduring bipolar world order, with India sitting in a third, potential kingmaker spot with enough power potential to tip the balance if it were to side fully with the US or China.

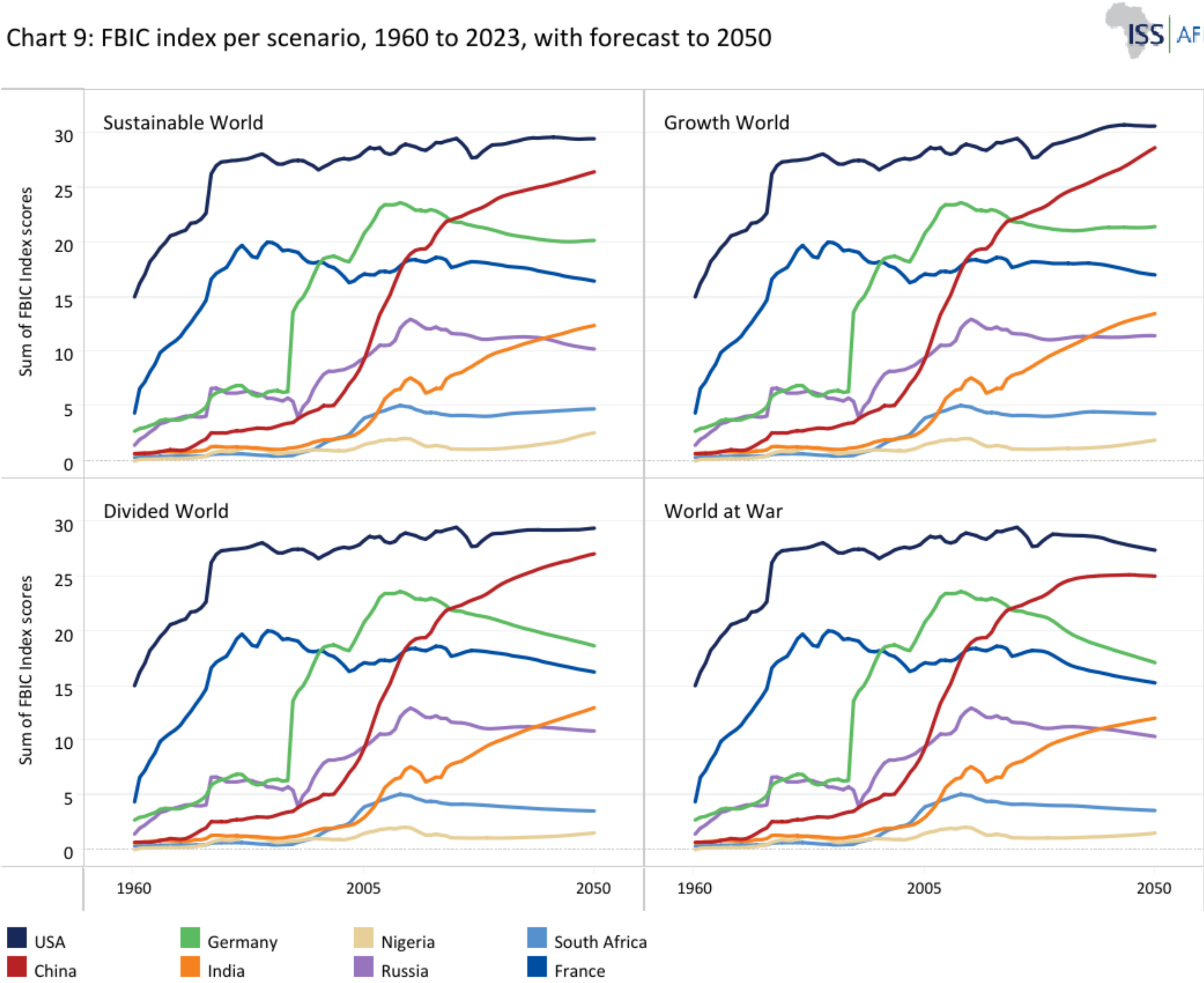
As discussed previously, a combined EU has enough power potential to constitute a third pole in a multipolar world order, but this assumes its member countries act in unison. At the individual country level, a few EU powers remain highly ranked, with France and Germany in the top ten, regardless of the scenarios or whether using GPI or the DiME Index. In Europe, the same applies to the United Kingdom (UK). Although Russia's power stagnates or declines, it too remains a top-ten global power.

For all other countries, their top-ten status is not assured and depends on either the scenario, the measure (e.g., Japan remains top-ten ranked with the GPI across scenarios but not with the DiME Index) or both. Should Indonesia become a top-ranked power—which is the case in all but the Growth World when using the GPI as the determining metric—a potential "mini-polar world", in which it leads the Association of Southeast Asian Nations (ASEAN) on a more independent path, is possible. Even so, the magnitude of ASEAN member states' combined power potential would be much lower than that of either the US or China. Hence, the likelihood of a truly independent geopolitical pole in Southeast Asia seems low according to these forecasts. The world order, then, would effectively remain bipolar, but with more power dispersed outside China or the US.

For the DiME Index, where nuclear weapons account for one-fifth of the index's total weight, nuclear proliferation in the Divided World and World at War scenarios dilutes the national power of states, which in 2025 are ranked as powerful in large part due to their possession of nuclear weapons: Israel, North Korea and Pakistan. While the nuclear stockpiles of these three states grow in these scenarios, the states that gain nuclear weapons gain potential leverage across most instruments of power, propelling them up the rankings. And although the simulation of which states gain nuclear weapons may be incorrect, as proliferation has historically been difficult to predict, the point stands that proliferation generally would be expected to weaken Israel's, North Korea's and Pakistan's national power, as measured by the DiME Index, since it boosts those of others. The same is true of the GPI, though to a much lesser extent, given nuclear weapons' lesser weight in that index.

According to the FBIC Index, Europe appears extraordinarily influential on the world stage, which is perhaps not surprising given its history, but because FBIC models bilateral flows, much of the influence capacity that European states possess is in other European states. Moreover, we must be cautious when summing the FBIC Index across groups. Since the index includes trade agreements, when the European Union signs an agreement with a particular country, that agreement is counted for each EU member state. When summing the EU member states' influence capacity, then that trade agreement is counted 27 times. As such, while useful for tracking trends in EU influence capacity, neither its summed FBIC Index scores nor the summed values of the AU (or any other group of countries) can be compared directly with the influence capacity of any single country, such as the US or China. Instead, in Chart 10, we select a few top-ranked EU and African countries, namely, France, Germany and the UK, as well as Nigeria and South Africa.

Chart 9: FBIC index per scenario, 1960 to 2023, with forecast to 2050

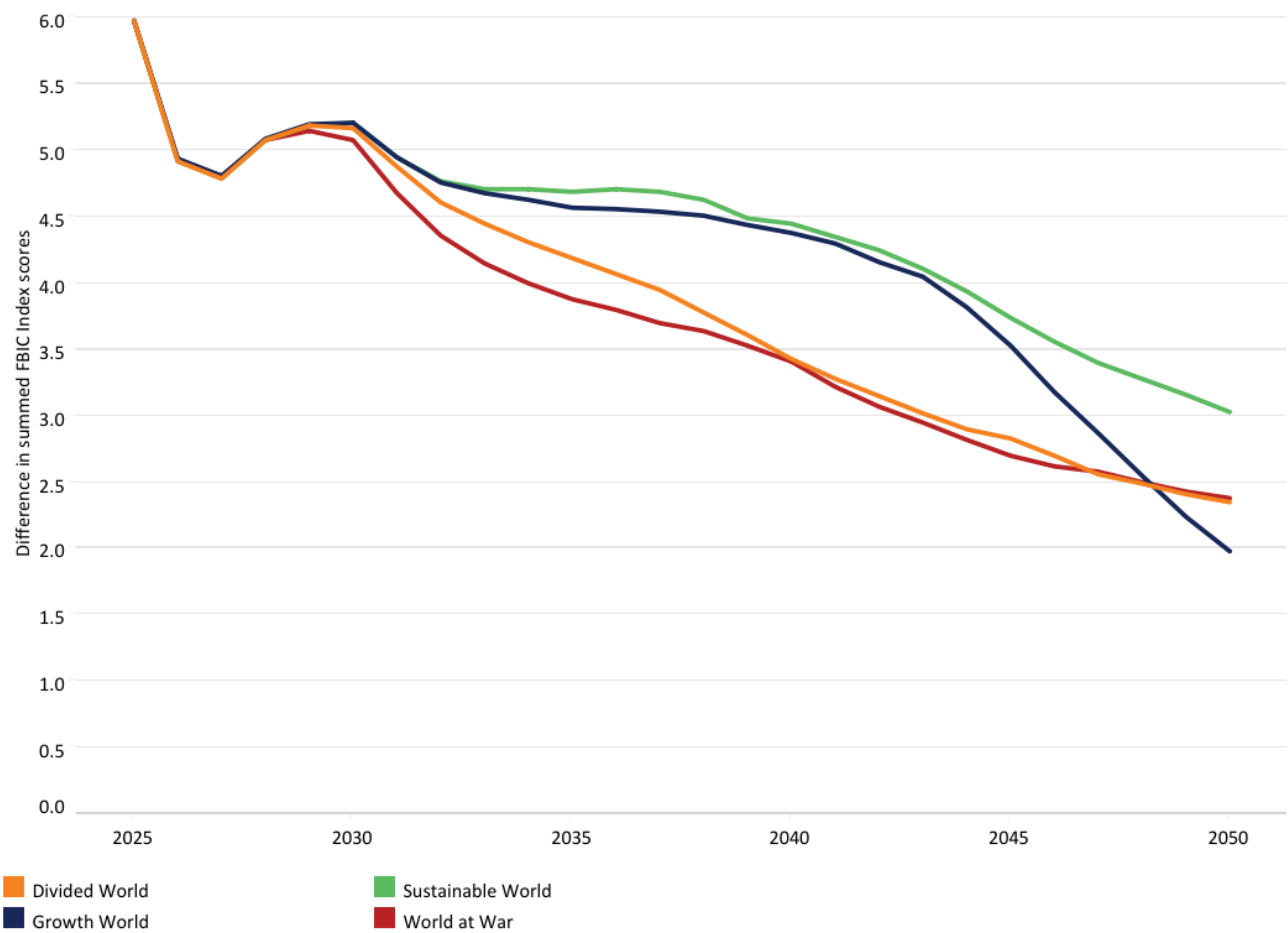


Source: IFs 8.72 initialising from Diplometrics data

Scaled from 0 to 1 for any given bilateral relationship, with 0 being a case where one country has no influence capacity in another and 1 being the maximum influence capacity measured in any country pair since 1960 (Russia in Belarus for the most recently available historical FBIC Index data), evaluating summed FBIC Index scores is not straightforward. However, comparing relative magnitudes and trends can tell interesting stories.

Forecasts of global influence capacity, as measured by the sum of a country's FBIC Index score across all other countries, illustrate a persistent, though increasingly less commanding, US lead over China through mid-century. The US lead erodes the slowest in a Sustainable World and the fastest in a Growth World; in the latter case, China is poised to pass the US within a few years beyond the forecast horizon presented here. According to these forecasts, recent US policies that have turned away from environmental sustainability and toward free-market-oriented economic growth may be self-defeating when viewed through the lens of US-China competition. That said, in absolute terms, US global influence capacity is slightly higher in a Growth World than in the other scenarios presented here—it is just that China benefits even more than the US in this scenario.

Chart 10: US FBIC index score minus China FBIC score globally, 2025-2050



Source: IFs 8.72 initialising from Diplometrics data

In a Growth World, Germany in particular sees extraordinary benefits, with its decline in global influence capacity reversing within the next decade and continuing to grow through the end of the forecast horizon. The scenario benefits Europe's other top power, France, as well, though its decline in global influence merely arrests, rather than reverses.

Still, in no scenario presented here does the balance of geopolitical influence capacity within and across Europe fundamentally shift. This contrasts with the fundamental shift that occurred shortly after German unification, when, according to the FBIC Index, Germany rapidly eclipsed France's influence worldwide. This was due in large part to Germany's trade but also because, aside from the US, it is one of the few countries with a relatively balanced influence-capacity toolkit. In other words, it has strong and often asymmetric economic (via trade and aid), security (via the arms trade) and diplomatic (via embassies and membership in intergovernmental organisations) ties with many countries.

Chart 11: France and Germany's global influence capacity, 1960 to 2023, with forecast to 2050

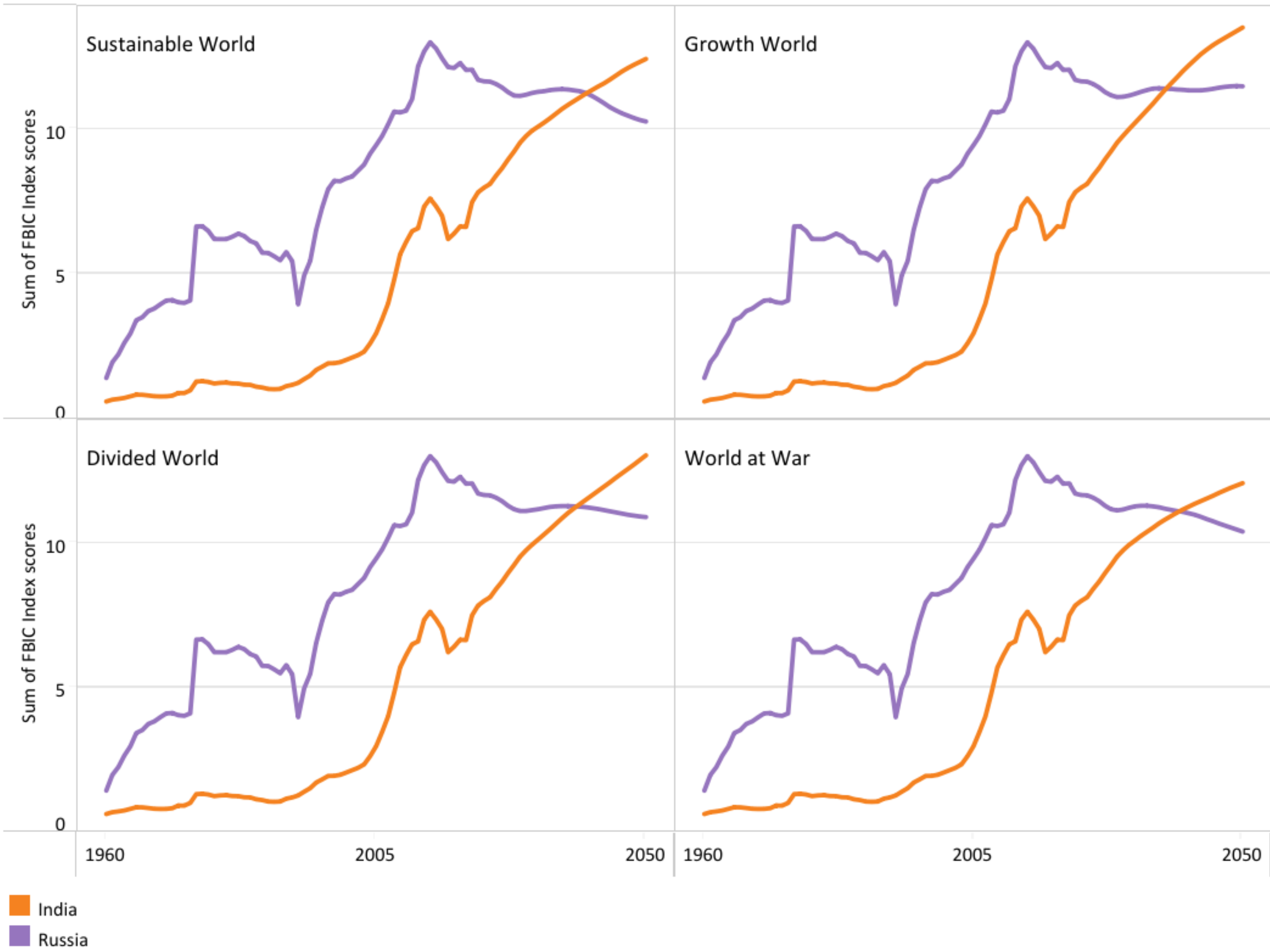
France
Germany

Source: IFs 8.72 initialising from Diplometrics data

A fundamental reordering of geopolitical influence capacity is forecast for Russia and India—an intriguing prospect given India's dependence on Russian arms and oil in recent years. India's rise is particularly notable, as it is one of the few major countries forecast to increase its capacity for global influence even in a World at War scenario. Across scenarios, India rises from the 10th-most influential as of 2025 to 5th-ranked in three of the four scenarios and 6th-ranked in the Growth World (rankings depicted in Chart 14).

In absolute terms, like nearly all other countries, India gains most influence capacity worldwide in a Growth World. However, its lead over Russia grows most in a Sustainable World, which harms Russian influence capacity (largely due to reduced global dependence on Russian oil and gas) even more than in a World at War. In all of these scenarios, despite its substantial growth in global influence capacity, India still falls far short of France (ranked ahead of it in 4th place globally in 3 of the 4 forecast scenarios). Additionally, across three scenarios in which India passes Italy, it does so near the end of the forecast horizon, in the mid-to-late 2040s.

Chart 12: Russia and India's global influence capacity, 1960 to 2023, with forecast to 2050

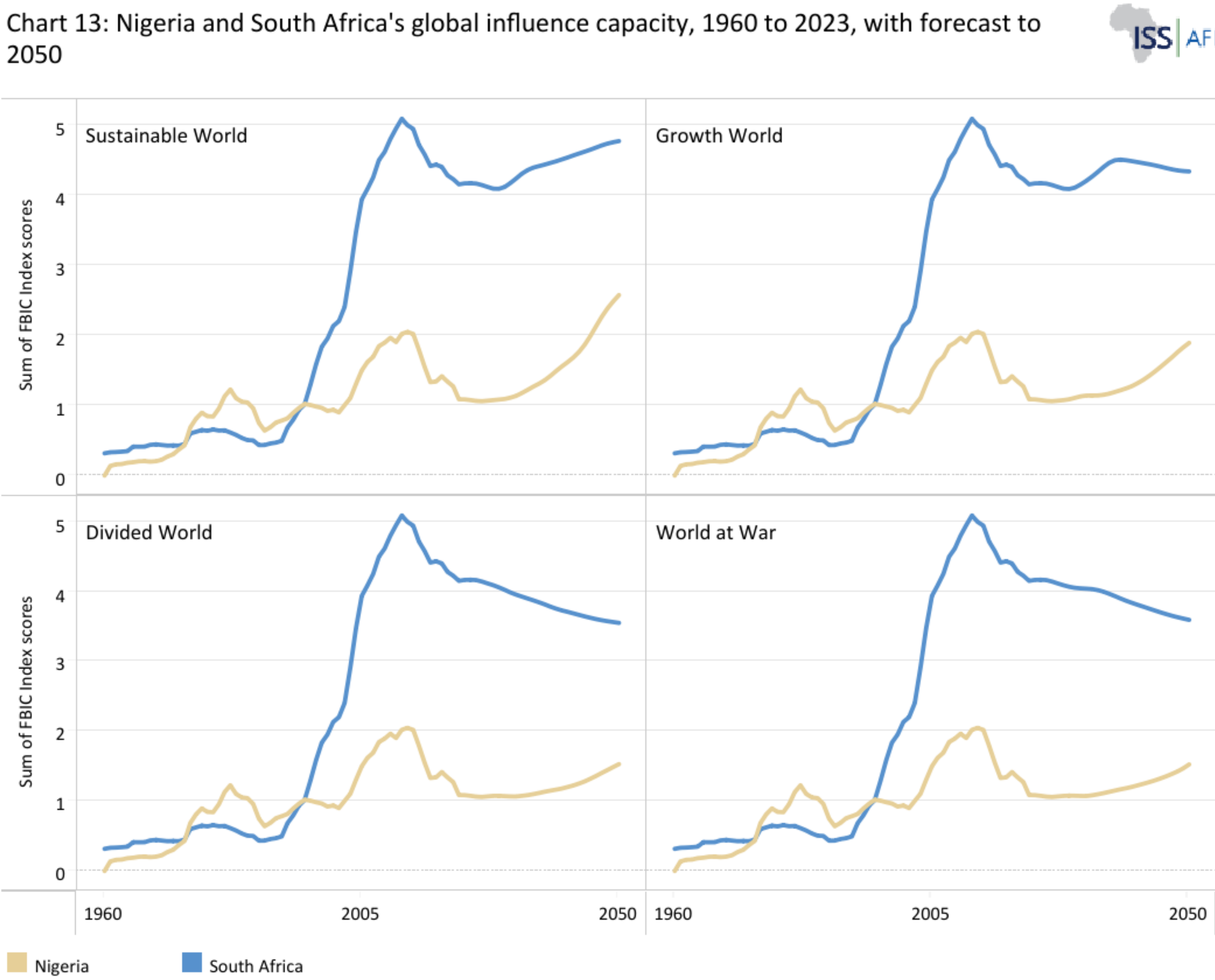


Source: IFs 8.72 initialising from Diplometrics data

The implications for national power and influence in Africa are discussed in the Africa in the World theme. Briefly, as forecasts for Nigeria and South Africa illustrate, a Sustainable World offers the most optimistic future. While a Growth World boosts global influence capacity in both countries, South Africa, near-term gains do not entirely reverse a long-term decline that began just after 2010, according to the FBIC index.

In no scenario does any single African country become a major geopolitical influencer on par with Europe's top powers, China, India or the US. Yet in combination, they do, in a Sustainable World. This suggests that a more influential, meaning a more self-reliant and strategically autonomous, Africa is highly plausible should the appropriate policies be pursued. Again, see the theme on Africa in the World for more.

Chart 13: Nigeria and South Africa's global influence capacity, 1960 to 2023, with forecast to 2050



Source: IFs 8.72 initialising from Diplometrics data

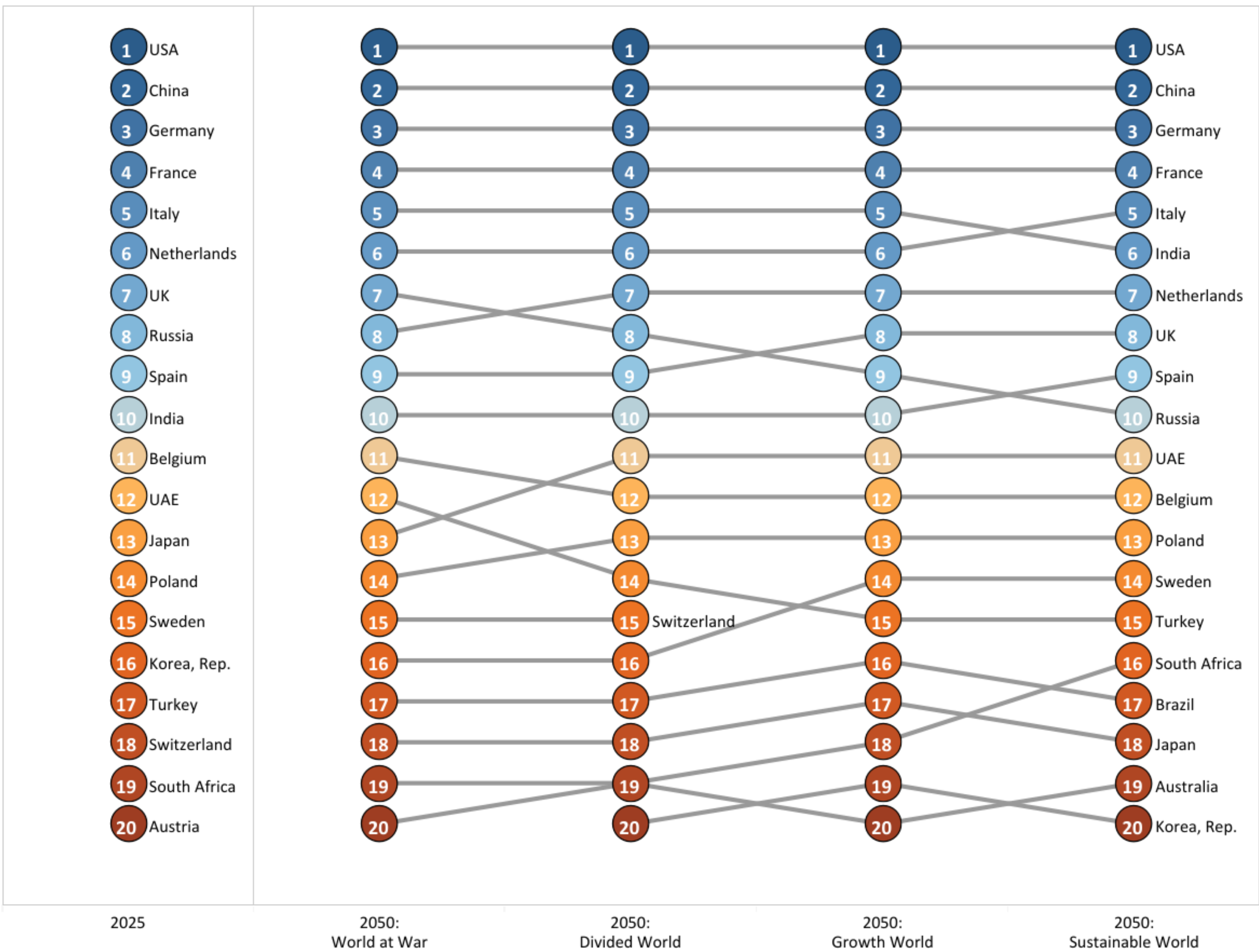
Looking more broadly across the Global South, Brazil sees large gains in its capacity for geopolitical influence in all scenarios. This is similar to India, though across all scenarios, Brazil, ranked 22nd globally as of 2025, enters the top 20 but remains outside the top 10 countries with the greatest capacity for global influence. Turkey makes a similarly sized gain in rankings in a World at War scenario, and smaller but consistent gains in global influence capacity across the other scenarios.

This does not mean that the world order will necessarily become multipolar. (Indeed, given the global power forecasts presented above, a country like Brazil or Turkey is unlikely to have the national power to lead its own pole in the international system.) Yet it does paint a picture of rising middle powers that are better able to resist great-power ambitions, particularly in their neighbourhood.

Several traditional powers, particularly the UK but also, from a much longer historical perspective, Spain, lose influence across all scenarios. Again, this suggests a reshaping of the international order, at least partially validating Chinese

President Xi Jinping's notion that the 'East is rising and the West is declining'—though this requires bucketing Japan and South Korea, which lose ground in global influence capacity across all scenarios, into the geopolitical "West" despite residing in the geographic "East."

Chart 14: Top ten countries ranked in 2025 and 2050 forecast using FBIC per scenario



Source: IFs 8.72 initialising from Diplometrics data

In many cases, changing patterns in global trade—themselves driven by shifts in economic growth and production across sectors—are driving these forecasted changes in geopolitical influence capacity. Another substantial driver is foreign aid, where as countries develop, fewer will be dependent upon outside donations and thus offer traditional aid donors less capacity to exert influence. Trade and aid are the two strongest, most direct drivers of change in the FBIC Index forecasts.

Deeper drivers include demographics. By 2050, less than one-tenth of the world's population will be European, while roughly one-quarter of the world's population will be African. Africa's people power does not translate into geopolitical dominance, but it will become increasingly difficult to ignore. Complicating the conversation will be a generational divide: for example, the average European will be in their late 40s in 2050; the average African will be in their mid-20s.

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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