Global Power Shifts

Conclusion: Navigating an Uncertain Future

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Last updated 24 August 2026 using IFs v8.72

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The key uncertainties aside, across all scenarios and indexes forecast here, the US and China remain at the top of the global order through mid-century, followed by a combined EU and India, then all other countries. The result would be a "mini-polar" world: in other words, a global order which is largely bipolar, with opposing poles led by the US and China, where the EU and India may possess the power and influence to shape geopolitics broadly in specific circumstances, but generally hold sway mostly in their own immediate geographic regions. For Africa, this begs the question of geostrategic choices, which we examine in Africa in the World.

Brazil in Latin America and Nigeria in Africa are examples of rising powers that may one day also possess the capacity to lead independent geopolitical poles. Still, the forecasts presented here suggest that if that day comes, it will be long past the middle of this century. This, however, does not negate their respective abilities to act as builders, for example, of alternative economic engagements which reduce vulnerabilities to Western, particularly US, leverage.

Given that India's power does not require it to band together with other states, as is the case with EU member countries, it stands to act as a potent "kingmaker" in the global order. But this is only if India addresses its current domestic governance challenges and if its leaders choose to engage more deeply in global politics rather than pursue the relatively disengaged stance inherent in non-alignment.

Meanwhile, enduring US power and influence will require avoiding costly wars of choice and embracing engagement with the wider world beyond its traditional alliance structure—a path that sits in sharp contrast to recent policy choices. Europe must, at the same time, band together and embrace deeper engagement in Africa to diversify its geopolitical influence beyond its borders. That said, the EU's best-case scenario among those presented here does not match Africa's; the former is favoured by a Growth World, the latter by a Sustainable World. Deepening partnerships must address this divergence rather than rely on interests to align naturally.

All the while, absent an unforeseen regime collapse, China will loom increasingly large in international politics. Rather than a structural break from the past quarter century, we can expect the continuation of recent trends, at least in broad terms. Multipolarity may not come to fruition, but an increasingly diverse set of highly ranked powers almost certainly will. We are thus unlikely to repeat the Cold War of the 20th century. Regardless of the future scenario, non-traditional powers can be expected to have a growing voice. This is anticipated to make the international order more inclusive—and more complicated to navigate.

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Cite this research

Jakkie Cilliers (2026) Global Power Shifts. Published online at futures.issafrica.org. Retrieved from https://futures.issafrica.org/thematic/17-global-power-shifts/ [Online Resource] Updated 24 August 2026.

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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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