



# Africa in the World

## Thematic Futures

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Africa's development depends, in part, upon a facilitating global environment. In this theme, we review global trends and then present four global scenarios, asking how a Sustainable World, a Divided World, a World at War and a Growth World impact upon Africa's development. For more information about the International Futures modelling platform we use for our scenarios, please see [About this Site](#).

## Summary

This theme [starts](#) with an overview of recent dynamics in power and influence, using trends in Gross Domestic Product per Capita (GDPPC), and then three separate indices of power and influence to understand the likely future evolution of a business-as-usual forecast (Current Path). The analysis points to incremental improvements in Africa's material power, at odds with the continent's rapidly growing population.

Globally, economic and political heft is shifting towards Asia. Around 2043, [China](#) will overtake the US as the single most powerful country in the world, and we will examine its ambitions. Although the West remains dominant in wealth, technology and power for the remainder of the 21st century and will continue to benefit inordinately from a rules-based system created in its image, its ability to shape and maintain that order is rapidly declining. Other trends include populism and its domestic effects, power diffusion in the West, and global decoupling favouring regionalism. Rather than a new uni- or even bipolar order, the international trend is towards a complex, multipolar power configuration.

Historically and currently, [Africa is a small global player](#). Its status has been elevated, at times, due to East-West competition, its role in providing fossil fuels during the war on terrorism, and the focus on development with the crafting of the Millennium and Sustainable Development Goals. Lately, Africa has again become an area of competition between the West, China and Russia. Its importance will increase given the sheer number of African states that engage in various fora globally, Africa's role as a source of critical minerals to power the transition to a sustainable future and because of the fears in Europe and elsewhere about a significant outflow of migrants from Africa.

Building on these trends, we frame Africa's development through four alternative global scenarios: a Sustainable World, a Growth World, a Divided World, and a World at War. Each scenario examines the potential implications for Africa, focusing on how globalisation, sustainability and geopolitical shifts could shape the continent's future.

The current trajectory most closely aligns with the [Divided World](#) scenario, reflecting disaffection with the Western rules-based system. This scenario demonstrates the acceleration of the current trends towards a more fragmented global order, an associated retreat from the Western rules-based system, and China's more rapid rise to become globally dominant towards the end of the forecast horizon.

The [World at War](#) scenario is the worst case for everyone, as overall gains are below any other. War in Europe and the Middle East is followed by wars in Asia. The scenario could escalate from the war in Ukraine to conflict in the Middle East or Asia as China and India come to blows. Military expenditures and inequality increase. Because of population growth, Africa still grows economically, but very slowly.

Neoliberal, trickle-down economics and increased corporate concentration characterise the [Growth World](#) scenario, which leads to better economic results but to the detriment of equality and efforts to contain global greenhouse gases, resulting in negative climate change impacts. Trade competition between the US and the EU intensifies, while the economic complementarity between the US and China drives global growth.

The [Sustainable World](#) scenario maximises Africa's economic potential, such as income and poverty reduction improvements. The international community acts in concert to balance growth and distribution by reducing overall consumption and constraining greenhouse gas emissions. It is, however, the most difficult scenario to attain and most likely to emerge from a crisis such as the World at War scenario.

The [impact](#) on the size of Africa's economy, GDP per capita, and poverty levels are starkly different in the four scenarios. Africa is complex and diverse and the examination of the effects differ markedly between countries. Expectedly, Africa does best in the Sustainable World and worst in the World at War scenario. Regional integration, or the lack thereof, plays an important role in shaping the associated outcomes, but even in the Sustainable World scenario, Africa will still struggle with extreme poverty in 2043. The current trajectory towards a Divided World places a cap on Africa's development potential. Beyond [Africa's development needs](#), the

accelerated impact of climate change will require a collaborative approach rather than the current trend towards division. Only much deeper economic and political integration in Africa, complemented by more rapid and sustained economic growth could offset the continent's limited role in shaping global orientations.

Two megatrends underpin the analysis, namely the accelerated impact of [climate change](#) and [technological advancement](#), particularly artificial intelligence.

The analysis also considers the disruptive potential of various low-probability but high-impact [wildcards](#), such as great power implosion (either in China, the US or the EU), expansion (in the case of the EU) and the impacts of artificial intelligence.

The theme [concludes](#) with a set of policy recommendations. Seen from an African perspective, the headline requirement is clearly the need for geopolitical stability that provides room for Africa's development and avoids renewed efforts to instrumentalise the continent and its member states in the ongoing rivalry between China, Russia, the US, and others.

## Introduction

Africa's development potential depends on transformative domestic governance, effective institutions, enhanced security, and economic and human development progress—key areas within its domestic policy space. The website's geographic and thematic analyses explore these priorities in detail.

However, Africa's trajectory is not shaped in isolation, but it is deeply intertwined with global dynamics. This theme examines how shifts in global power and influence shape Africa's development prospects.

The analysis incorporates results from modelling the global distribution of power and influence using three indices embedded in the International Futures forecasting platform (University of Denver) that assist in understanding the likely evolution of a business-as-usual forecast (Current Path):

- [Global Power Index \(GPI\)](#)
- [Diplomacy, Military and Economy \(DiME\) Index](#)
- [Formal Bilateral Influence Capacity \(FBIC\) Index](#)

See the [About section](#) on this website for more details on IFs.

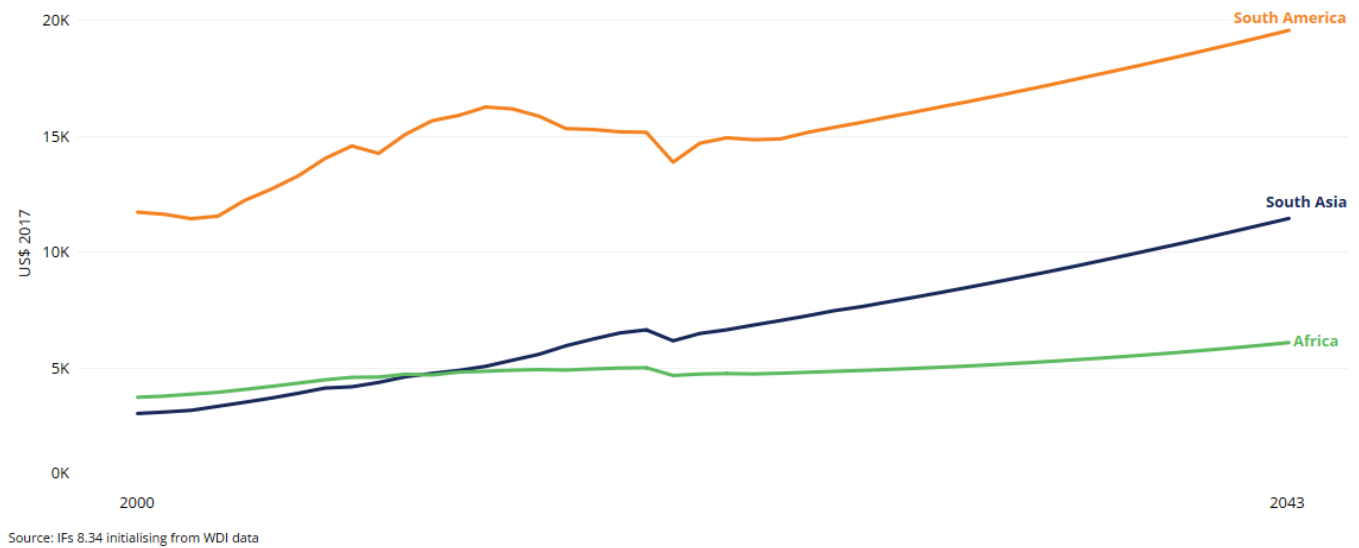
The first two indices measure power potential, a complex and challenging exercise. The third, FBIC, assesses the bilateral influence of one country over another, reflecting the intricate dynamics of global relationships.

Building on these measurements, we frame Africa's development within four alternative global scenarios: a Sustainable World, a Growth World, a Divided World, and a World at War. Each scenario explores the implications for Africa, highlighting how globalisation, sustainability and geopolitical shifts might shape the continent's future. The analysis also considers the disruptive potential of wildcards, including a great power implosion in the US, China or Russia, major regional developments in Europe or Asia, extreme impacts from climate change, and the unintended effects of rapidly advancing artificial intelligence.

The theme concludes with actionable policy recommendations to foster a stable global environment that enables Africa's growth while safeguarding its autonomy in an increasingly competitive international system.

## Africa's position in global development

Chart 1: GDP per capita, 2000-2043



With some exceptions since independence, Africa has not been able to narrow the gulf between itself and averages for the rest of the world on key well-being indicators, such as infant mortality rates and life expectancy. Measures of income have done even worse. Using a crude measure such as Gross Domestic Product per capita in purchasing power parity (GDP PPP), the gap between Africa and the average for the rest of the world has steadily increased. Some countries, such as [Seychelles](#), [Mauritius](#) and [Botswana](#) have done well, with [Ethiopia](#) and [Rwanda](#) experiencing some of the fastest economic expansions in the world, with an average of more than 7.5% per year in recent decades. Nevertheless, most African countries have stagnated or fallen further behind in key development indicators, even when compared to other developing regions such as South Asia and South America. Chart 1 depicts this gap in average GDP per capita between Africa, South Asia and South America from 2000, with a forecast to 2043.

So what would the future look like?

Our forecasts indicate that, on its [current development trajectory](#), the growing divergence between Africa and the rest of the world, including other developing regions, is likely to increase when considering GDP per capita. Things are improving in Africa but more slowly than elsewhere, with large country-to-country variations. Generally, we refer to this as the Current Path elsewhere on this website.

Six recent successive shocks have accelerated that trend: the impact of the 2008/09 global financial crisis, the COVID-19 pandemic, Russia's invasion of Ukraine, the deteriorating relations between China and the West, the resurgence of hostilities in the Middle East following events in Israel and Gaza, and the rise of populism in the US and Europe, including the recent re-election of Donald Trump and his subsequent assault on the US's Western allies. The world is entering uncharted territory with the accelerated effects of climate change, which is a structural driver of scarcity and migration, and the disruptive impact of generative artificial intelligence.

Given its dependence on imported food, Africa is especially at risk of food insecurity. The threat of a simultaneous harvest failure in the six global breadbaskets that produce 60% of the world's corn, rice, soy and wheat crops is rapidly increasing, among other [risks](#). Thus, the UN Secretary-General's report, [Our Common Agenda](#), notes that 'we are at an inflexion point in history' facing a stark choice between 'breakdown' and 'breakthrough'.

To what extent will the growing divergence between averages for Africa and the rest of the world impact global sustainability and stability, including increased migration to Europe and within the continent? Is it possible to envisage a stable world so starkly divided between Europe and Africa in wealth and quality of life? For example, the average GDP per capita in Africa is only 11% of that in the European Union (EU), with a 14-year gap in average life expectancy. We expect these differences to only reduce marginally over the next two decades.

Fixing these alarming discrepancies will require better governance in Africa, characterised by more robust, more capacitated states with fit-for-purpose institutions, more security, and improvements across various economic and human development sectors, much of which is within Africa's domestic policy space. We examine many of these considerations elsewhere in the website's geographic and thematic analyses.

Rapid development in Africa will also require a facilitating global environment — the subject of this theme. Therefore, we ask **what is the impact of geopolitics on Africa's development**. To explore the potential implications, we model Africa's development in four future global scenarios further below.

## A rising China but still a dominant West

The rise of China and surrounding Asia as the most important source of economic growth globally and the associated shift of economic heft eastward is well established and widely reported. Given its growing population and deepening ties with China, Africa is well-positioned to benefit from this trend. The result is a commensurate reduction in the West's relative economic and political weight and the rise of additional sources of capital and influence, such as from the Middle East (particularly the UAE and Saudi Arabia), reflecting an associated trend towards **regionalism** that reinforces global fracturing. At the height of globalisation, global trade grew as a portion of the global economy. It is now stable - but trade within politically aligned blocs now grows faster than trade between them, reflecting a **splintering** into more deeply integrated blocks. Today, Asia's economy is less dependent on trade with other regions and is increasingly more integrated and self-sufficient. China is at the heart of Asia, but Asia is much more than China, as the region includes many dynamic economies and large powers such as India and Japan — both of whom are at odds with China. Africa too is intending to expand intra-regional trade, though for different reasons.

For over a century, the US has been the most powerful country in the world (both in hard and soft power terms). It has successfully presented a narrative that equates global development, stability and progress with American interests. The close connection that it has established between democracy, the free market and so-called Western values is, however, starting to fray and is accelerating as Trump rails against friend and foe alike. Eventually the US and China need to decide - to pursue profit and partnership or competition and potentially conflict.

The US has derived considerable advantage from its dominant global position. Globalisation allowed it substantial advantages, attracting investment and allowing the US to manipulate the international system to its benefit. The status of the US dollar as the global reserve currency allows America to consistently run a more significant current account deficit than other countries. That advantage will fade in the years ahead as the use of national currencies in some regions, including in Africa, gains momentum. The assault by the 2025 US administration on aid, multilateralism and upon its Western alliance partners will accelerate this trend.

The fracking revolution in the US, together with the fallout from the war in Ukraine, means that China has become the most significant fossil energy market for the billions of dollars of oil exports from the Middle East, Russia, Venezuela and others. A new world energy order is taking shape that will eventually transact in various currencies, not only in the dollar. That shift will set the scene for the steady diminution of the dollar-based financial system and the benefits that flowed from it for the US. While China powers ahead, expanding its relations in the region through the Belt and Road Initiative and other efforts, the US is in danger of withdrawing from the world. Globalisation is now less popular than previously, with the belief that it allows 'others' to steal US intellectual property and catch up in a remarkable display of historical amnesia



for a country that has gained enormous advantage from the rules based system that it helped to create after the Second World War. The reaction to globalisation across rural America and the rise of domestic populism has translated into a resurgence of nationalism and isolationism that is detracting from US soft power.

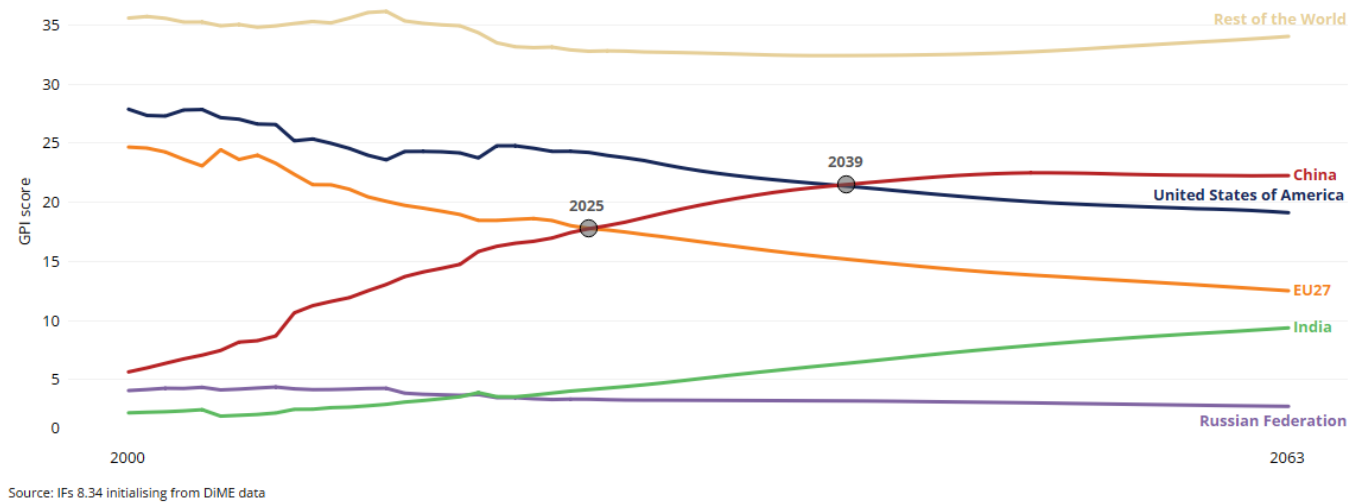
The first presidency of Donald Trump and the US's lack of consistency on global matters — ranging from its vacillations on the utility of NATO (Trump), stepping away from membership of the International Criminal Court (that predates Trump) to a lack of support for the World Trade Organization — was already deeply damaging to the US. It undermined its global appeal and the trust that others have in the US as a dependable ally, notably where foreign policy approaches may diverge significantly between presidents, such as views on Ukraine, North Korea, Russia and Taiwan when comparing the first Trump administration with those of Obama or Biden. The second Trump presidency could even lay the foundation for a global economic partnership between the US and China given the complementary and interdependent nature of these two giants and the extent to which US foreign policy interests are likely to focus on bilateral trade and economic benefits rather than democracy, human rights and good governance.

Given economic growth in Asia and elsewhere, the US's hard and soft power advantage is declining. Its reaction to the September 11, 2001, terrorist attacks, its subsequent military operations in Afghanistan and, in 2003, the disastrous invasion of Iraq that rescued Al Qaeda from the jaws of defeat and that ignited ISIS have affected perceptions of US hard power capabilities and fueled domestic debates regarding its future role globally. More recently, the impunity that the US has provided to Israel for the oppression, repression and war that Israeli Prime Minister Benjamin Netanyahu is pursuing in the wake of the terror attacks by Hamas of 7 October 2023 has reinforced views amongst the global South that different standards apply for people generally considered part of the 'civilised West' versus the rest.

The trend in the decline in the soft power of attraction enjoyed by the US predates these events. Most damaging was the image of a mob violently occupying Capitol Hill at the instigation of Donald Trump as he sought to overturn the presidential election results of 2020. His 2025 return as US president has significant ramifications for the US and the West. Eventually, the West may fracture as Trump's tariff war is directed at America's allies rather than others given the natural trade synergies that it has with countries that are nominally part of the expanded BRICS group (consisting of Brazil, Russia, India, China, South Africa, Iran, Egypt, Ethiopia and the United Arab Emirates).

The inevitable power transition between the US and China is confirmed by work published early in 2022 by our colleagues at the Frederick S Pardee Institute for International Futures. Using 29 alternative scenarios in its Diplomacy, Military and Economy (DiME) Index about the future diplomatic, military and economic capabilities of the US and China (including forecasts of nuclear weapon stockpiles), the Pardee Institute concludes that Chinese capabilities surpass the United States in 26 scenarios before 2060, with the most frequent period of power transition being the early **2040s**. Chart 2 presents one scenario result consisting of the per cent of the global power of the EU28 (including the UK given its alignment as part of the West), the US, India and China from 2000 with a forecast to 2063, this time using the Global Power Index (GPI). Under Trump as the 47th president as of January 2025, **the key question is if the US will pursue its traditional partnership with the EU (the West), or if Trump will prioritise the economic opportunities globally possible with China as part of a grand bargain?**

Chart 2: Global power balance, 2000-2063  
Measured using the Global Power Index (GPI)



The EU, with an economy comparable in size to China and the US, sets the global 'ethical' standard among larger powers on many issues, ranging from antitrust activities to Internet privacy, membership of international organisations, pursuit of democracy and support for human rights. Still, it suffers from an acute deficit in hard power capabilities compared to the US and China. Its social-democratic or more egalitarian model of development, particularly that of the Nordic countries, stands in sharp contrast to the raw capitalism in the US and the denial of individual rights in China although that model is steadily in question with the rise of populist parties in key member states including Germany, France, Italy and others. For the time being, European soft power is more significant than any other group of countries although its stance on intellectual property waiver for COVID-19 vaccines, rising xenophobia and its lacklustre responses on Ukraine and Palestine is steadily eroding that advantage. **Similar to the US, nationalist populism is driving politics in Europe** and it will negatively affect its relations with Africa, particularly regarding concerns around migration, culture and religion.

Given its history of colonialism, it is not surprising that even in 2000, the combined US/EU group had eight times more influence in Africa than the combined influence of China and Russia, using the FBIC index mentioned previously. But by 2023, the ratio had declined to only three times more influence, and it is declining.<sup>[1]</sup>

Also, Western countries evidence a trend of power **diffusion** away from the state, which is today less central in many people's lives as additional patterns of interaction emerge. New technologies, the internet, and lately artificial intelligence, detract from social cohesion, infusing hate speech, extremism, and conspiracy theories into echo chambers on social media that serve to divide rather than cohere society. These technologies detract from the ability of democracies to offer freedom of speech and access to information in a balanced and unbiased manner, both of which are now increasingly manipulated, whilst strengthening the ability of centralised systems of authoritarian countries such as China and Russia to monitor and control their populations. The power of generative Artificial Intelligence in today's connected yet divided world is such that the World Economic Forum's [Global Risks Report 2024](#) identified misinformation and disinformation as the number one global risk in 2024 and 2025, given the number of elections scheduled in these years.

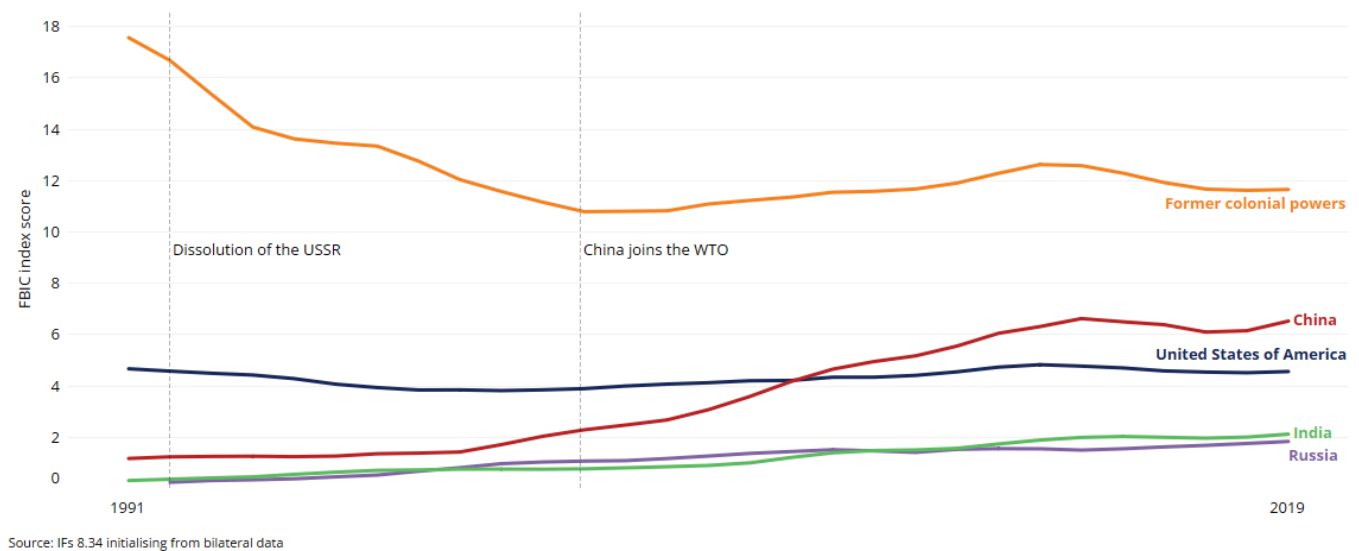
A range of non-state actors, including from the private sector, civil society, and social media influencers, now serve as alternative sources of authority and reference, complicating and crowding the space previously occupied by traditional media, bureaucracies and elected representatives.

The flow of materials from Africa to China and Beijing's investments in infrastructure and trade with Africa are shifting relationships. Using FBIC (see Chart 3), China has increased its influence in 53 African countries, and FBIC only calculates a slight decline in one country, Tunisia. The UK has seen a decline in its influence in most African countries. Taking 2000 as a baseline, by 2019, the UK had increased its influence in 18 African countries but experienced a decline of double that number. The recent surge in anti-French sentiment in its former African colonies speaks for itself, as it has now been expelled by military governments in Niger, Mali, Burkina Faso, and Chad, as well as democratic Senegal.

The picture for the US is **mixed**, but its interest in Africa has waned over many years, reflected in declining investment. Following less Russian influence for much of the 1990s, Moscow has made a concerted effort to benefit from the decline in support for the West in the Sahel, particularly with the provision of security and arms to several military governments in West Africa in the wake of its invasion of Ukraine. With limited economic leverage in Africa, however, Russia's proxy war with the West has its limits. With an economy that is the size of Brazil, Russia lags significantly behind great powers such as the US and China.

**Chart 3: Influence on Africa, 1991-2019**

Measured as sum of influence on all African countries; former colonial powers include France, Germany, Portugal, Spain and the UK



Measures of influence are at an early stage of development but are bound to become more popular over **time**.

In summary, should we consider the West (North America, Europe, Japan, South Korea and others) as one group and juxtapose it with countries aligned with China, the relative power and influence of the West is declining as a portion of the global total but remains dominant globally as the wealth and technology of its citizens and states significantly outpaces that of others. Despite the rise of China and Asia, the GDP per capita gap between North America, Europe, and Japan, compared to China, has remained constant and will likely increase. The comparative advantage of citizens and countries in the West vs China and its few true partners, such as North Korea, Cambodia and others, remains large across the forecast horizon.

Although China will become hugely influential within our forecast period, its rise does not translate into globally dominant power capabilities in any of the four scenarios. Even a combination of 17 countries from the Global South, including China, Russia, Iran and various others, does not compare in power potential and influence to a combined West. Current indications point to China becoming more influential in Africa than any other single country and the continent's future increasingly tied to Asia, particularly when including ties to countries such as India, South Korea and Indonesia. Rather than a new uni- or even bipolar order, **the global trend is towards a complex, multipolar global power configuration.**

However, entirely different scenarios emerge when considering a US retreat from the international system and increased trade competition with the EU. The US and China collectively account for 41% of the global economy, which are growing more rapidly than the EU. In the face of the better trade synergies between the US and China and competition between the EU and the US on labour and energy costs (crucial inputs into manufacturing), the expectation that the US should continue to subsidise Europe's security while running a trade deficit with the EU is a ready sticking point in the US-EU relations in spite of the fact that the US regularly runs a much larger **trade deficit** with China than with the EU.

The GPI and DiME indices clarify the actual state of power in the international system using a set of carefully curated measures and weights. In 2023, a combined West<sup>[1]</sup> constituted 58% of total power in GPI, declining to 46% in 2050.

In considering these findings, it is essential to recognise the benefits that accrue to the US (and Europe) as the historical 'system makers' and, therefore, 'privilege takers' of the current **global order**. This group of industrialised, rich countries shares several core values (such as a market-based economy, democracy and human rights) and various cultural traits. The North Atlantic powers have dominated world affairs since the Industrial Revolution and have shaped today's rules, norms and values to determine inter-state relations in their interests.

However, in these times of upheaval and change, the past is not an inevitable guide to the future.

For example, the geo-political orientation of Japan, South Korea, Australia and New Zealand could shift in China's favour as leaders position themselves to benefit from China's rise. A Chinese decision to incorporate Taiwan and continued internal repression and human rights issues concerning communities such as the Uyghurs in China could exacerbate current regional divisions. The unification of the two Koreas would likely shift that country into a non-aligned grouping or China's orbit, given the proximity impact and the accompanying trade-offs. Similar to the problematic history that the US has in its relations in Central and South America, China's giantism is encouraging efforts at resisting its domination in Asia, particularly by the six or so countries that have territorial disputes with it.

New alliances may also appear between India and Japan, but none would be as consequential as a US withdrawal from its previous role of international security commitments, leaving space for others, China in particular.

In the wake of successive failed adventures in Afghanistan, Iraq and elsewhere, the second Trump administration clearly favours a more restrained approach to international engagements, prioritising domestic concerns and avoiding costly foreign entanglements. This includes a shift away from multilateralism towards trade protectionism and a clear transactional approach to international relations that steps away from efforts to promote free trade, democracy and human rights. The implications could be far-reaching. For example, a US decision to take Taiwan tensions off the table by respecting China's red lines could see a shift in relations that could eventually unlock a de facto economic partnership between the US and China should Trump's transactional foreign policy orientations set the scene for his successor in the Oval Office. The result will inevitably embolden others such as Russia, Iran, the UAE and Turkey also to pursue their regional interests.

The current configuration already comes with significant penalties for those on the margins of the system makers, including for Africa, practically reflected in limited voting rights in essential institutions such as the IMF and the World Bank, in the UN Security Council and punitive risk ratings from Western-based credit agencies, among others. Given its historical scepticism of multilateralism, reform such as a revision of voting rights within the key institutions at the heart of the international financial system or expansion of the UN Security Council to allow for the inclusion of African countries as permanent members with a populist US president in the White House is unlikely.

At the heart of geopolitical change is Asia's rise, reshaping global relations. Beyond its growing economic heft, East and South-East Asia has a larger population than any other region. It is increasingly interconnected through efforts such as

China's Belt and Road Initiative. Still, the region does not have the associated political superstructure, alliances or shared values to translate its growing economic heft into coherent power potential.

Views on [China's global ambitions](#) differ. Parag Khanna argues that China's primary interests are 'foreign resources and markets, not foreign colonies.' He argues that its grand strategy of building global infrastructure and engagement in regions such as Africa aims to reduce its dependence on the West, bind its neighbourhood more closely together and reduce its reliance on foreign suppliers such as minerals from Australia and high technology from the US. In this view, China's ambition is regional, not global dominance, but it does require a facilitating international context. Students of Xi Jinping, such as Steve Tsang and Olivia Cheung, differ. Their book, *The Political Thought of Xi Jinping* makes a compelling case of huge ambition, to 'make China great again'. The successive release by President Xi of China's proposal on building a community with a shared future for humanity (in 2013), its Global Development Initiative (at the UN General Assembly in 2021), a Global Security Initiative (in 2022), in 2023, its Global Civilisation Initiative and, in September the same year, its proposal on Reform and Development of Global Governance, present a comprehensive alternative framework to the Western rules-based system including on views on national sovereignty, national development, human rights, climate change, green and low-carbon development, globalisation, the role of the private sector, and more. It presents a model of domestic and foreign relations where regional powers are likely to dominate, free from interference from elsewhere, and where governments pursue national policies without the constraints of a free media, foreign interference or the need to balance the executive, judiciary and legislature - all subject to the requirement to pay due homage in a Sino-centric world.

Other regions and groups, such as Latin America and the Caribbean, Oceania, and the Middle East (including Türkiye), each constitute less than 5% of global GDP, except for Latin America and the Caribbean, which have a share of almost 7%. However, that portion will decline to below 5% by 2043. Many countries may consider themselves bishops or castles (rooks) in the global chess game, but most are plodding pawns.

Whereas the West will continue to dominate in many aspects of material and soft power calculations, a growing divide is opening up with the Global South and within the Global North as bickering and trade friction between the US and the EU are likely to increase.

## Africa: A pawn rather than a player?

- [Briefly](#)
- [Recent History](#)
- [Africa's prospects](#)

### Briefly

Against the background outlined above, we next consider Africa's place and power in the international arena.

### Recent History

After independence, Africa's standing was elevated, with East and West competing for influence until the collapse of the Berlin Wall in 1989, which robbed it of that strategic value. Until then, important states on the continent were courted with money and arms as part of the Cold War competition between Washington and Moscow. Democracy and human rights considerations were generally trumped by loyalty, although sections within the development assistance community in some Western countries pushed back against this crude division.



After that, Africa's oil exports and location in the US war against terrorism briefly elevated its status at different times. Violent, political Islam spread from Afghanistan and Syria to North-West Africa and East Africa, primarily driven by the displacement effect of US military interventions in Asia and the Middle East. The period coincided with a brief unipolar moment during which the US achieved peak power and influence in the absence of a rival.

Africa's importance again dissipated thereafter, allowing for a brief period during which development priorities rose in international prominence. That period culminated with the agreement on the Millennium Development Goals in 2000 and, in 2015, on the Sustainable Development Goals. The boom in hydraulic fracturing for oil and gas in the US that started in these years effectively ended its dependence on imported fossil fuels and hence concerns about stability in the Middle East as well as in key African states such as Angola and Nigeria, and the support that it had provided to oil-rich autocracies.

European–African relations have been deeper and more enduring than relations with the US, not surprising given colonialism. Europe shares the same time zones and key languages, and the two are geographically proximate. Europe is Africa's largest trading partner and it has the most extensive stock of foreign direct investment in Africa. However, the growing popularity of right-wing parties in Sweden, Germany, France and Italy is the single most consequential domestic trend in several decades and it is increasingly determining Europe's foreign and international relations with Africa. At its extreme were responses by the UK and Italy that planned to send African asylum seekers to Rwanda and Albania on a one-way ticket. Other measures include the hardening of borders such as by Spain and large grants and loans to countries such as Egypt in return for efforts by the government of President Abdel Fattah El-Sisi to clamp down on the transit of migrants to Europe. Structurally, the tensions are fuelled by globalisation and the extent to which blue-collar jobs in manufacturing have moved to Asia, the rural/urban political divides in rich countries, and feed off deep-seated historical, religious and cultural divisions and fears that go back centuries.

In contrast to the declining relations with the US and Europe, China's footprint and influence in Africa has become more important each year. 'No other country comes near the breadth and depth of [China's engagement](#) in Africa,' wrote *The Economist* in an in-depth study of the relationship in May 2022.

During the 1960s and 1970s, as the Cold War intensified, China–Africa relations were political and ideological to the extent that, in 1971, when the UN voted for China to replace Taiwan, 26 African countries voted in favour. Itself a poverty-stricken country, China provided military support and aid to the African continent. The construction of the Tazara railway line in support of the frontline states in their conflict with apartheid South Africa, then primarily supported by the West, serves as the most prominent showpiece.

China's relationship with Africa changed during the 1990s as it increased in economic and political importance. A booming China needed oil and metals and eventually found an outlet for its sizable current account surplus and work for its construction companies that had built its roads, railway lines and ports, perfectly matching Africa's need for investment and infrastructure. However, China's annual loans to Africa shrank with the onset of the COVID-19 pandemic, despite the steady reductions in its current account surplus. Trade and return on investment are now more critical for China, even as it continues to buy favours in Africa, such as the recent gift of a building (and bugging) the tower block that hosts the offices of the African Union Commission in Addis Ababa, and building modern parliament buildings for Zimbabwe and Malawi. Zimbabwe, which has an [external debt](#) of US\$21 billion, is heavily indebted to China, which is still the only country willing to extend loans to Harare due to its deficient domestic investment environment, poor governance and dismal [repayment record](#).

After a COVID-19-induced decline in 2020, trade between China and Africa rose by 35% to US\$245 billion in 2021 and to US\$295 billion by 2024. China is Africa's largest bilateral creditor (as a group, Western private banks have a larger share) and a crucial infrastructure construction and investment source. Its projects are also concluded more rapidly. The average infrastructure project in the [Belt and Road Initiative](#) takes 2.8 years, roughly a third of the time needed by the World Bank or the African Development Bank, in part because environmental impact studies and other regulations are sometimes

bypassed. Whereas the West provides aid and, through its various agencies, concessional loans, Chinese development finance generally takes the form of loans at near market rates, much of it for infrastructure.

China's hard-nosed practice is quite different from its benevolent 'win-win' rhetoric. Contracts include strict confidentiality clauses, requirements that China be repaid ahead of others, the use of escrow accounts and specific identification of which revenues would be required to pay back loans. Because Chinese creditors are numerous and fragmented, keeping track is complex. More than one newly elected African leader (most recently President Hakainde Hichilema of Zambia) has found the amounts that his country owed to China to be much higher than initially thought once so-called hidden debts were also counted.

China's role in Africa is expanding beyond trade and loans. Already, Chinese firms account for an estimated one-eighth of the continent's industrial output. Its digital infrastructure is critical to Africa's communication, much of which was built by Huawei, a company under US sanctions. The result is that political, military and cultural ties are all becoming closer. African views about China are now more favourable than those of the US. However, a majority of Africans still list the US significantly ahead of China as a preferred future model, given its more open system of [governance](#).

Relations between China and Africa have, therefore, deepened. In April 2022, for example, China's special envoy to the Horn of Africa, Xue Bing, offered to help 'silence the guns' in the Horn of Africa — a pragmatic move by an influential investor. China has about 400 construction and manufacturing projects worth over US\$4 billion in Ethiopia alone. Since 2020 and until the Pretoria peace agreement in December 2022, Ethiopia was mired in a vicious ethnic conflict with the federal government in Addis Ababa pitted against rebel forces in the northern [Tigray region](#). In July 2024, Tanzania hosted the largest-ever Chinese [military deployment](#) to sub-Saharan Africa for Exercise Peace Unity-2024, which included troops from neighbouring Mozambique.

The response in the West to China's growing influence in Africa has been alarmist with recent efforts to counter the Belt and Road Initiative in Africa and elsewhere. In 2021, the Biden administration launched its Build Back Better World, and the EU launched its Global Gateway; in 2022, the [G7 club](#) announced its Partnership for Global Infrastructure and Investment (PGII) to mobilise US\$600 billion in infrastructure projects over the next five years and with a particular focus on [Africa](#). And for a brief few years under the Biden presidency, senior US and European diplomats visit the continent.

## Africa's prospects

Despite its large population, Africa is a small global player, with its combined influence diminished by the number of its constituent countries and its current lack of economic and political integration. Russia accounts for almost half of Africa's arms imports. It is a major supplier (along with Ukraine) of Africa's cereal imports, which was severely disrupted by the war between the two. Russia accounts for only 1% of the continent's foreign direct investment (FDI). This is minute compared to the stock of Europe's FDI in Africa, and recent FDI flows from China, Africa's largest trading partner.

The large number of African states and their relative weakness mean that they offer numerous opportunities for Russia (and others) to pursue a proxy war with the West. For example, they could provide military support (through the Wagner group, now known as the [Africa Corps](#)) and protection to coup makers in the Sahel, leading to the ouster of French and US forces from the region.

Without a supranational authority such as the EU Commission and its various structures and much deeper economic integration, the calculation of Africa's power potential is inevitably less than the sum of its more than 50 members, which, using GPI, constituted a mere 2.2% of global power in 2023. Because of the increased weighting of technology within modern indices of power (as opposed to historical measures that placed considerable weight on population size), by 2050, Africa will only increase its portion of global power to 3.9% while then constituting 27% of the world's population. Unlike

the EU, the Commission of the AU is essentially an intergovernmental secretariat with limited and circumscribed policy latitude. The continent still has to register practical progress on trade integration.

However, there is also a flip side to Africa's large number of constituent states, illustrated by Russia's recent charm offensive that followed its invasion of Ukraine and subsequent sanctions and ostracism from the [West](#).

**Africa's economic growth and population increase will steadily increase its power potential but more slowly than most analysts think.**

An important reason is that Africa's [labour force](#) is relatively small in relation to its dependants (children and the elderly), although it is increasing rapidly, while workers suffer from low levels of [education](#), with some exceptions, and [poor health](#). Africa is rapidly approaching a double burden of disease as the rates of non-communicable diseases are increasing rapidly. The result is that Africa's labour productivity is about one-fifth the average of the rest of the world, and together with high poverty levels and low incomes, the capital per working-age person is even less.

Although it receives relatively large amounts of capital through remittance inflows and aid, Africa loses substantial amounts due to corruption and illicit [financial](#) outflows. Because of extreme poverty levels, unemployment, high levels of inequality and limited government revenues to improve basic services delivery, key African countries, including Nigeria, South Africa and others, experience high [crime levels and poor governance](#). However, perceptions of instability are often generalised, not distinguishing between developing and stable countries and those in conflict. Finally, much of Africa's physical capital, such as roads, rail, water, electricity and other essential [infrastructures](#), is still of a colonial-era vintage. Still, it is being improved mainly due to recent investments by African governments and China in railways, ports, and associated infrastructure.

[Manufacturing](#) and services will expand rapidly on the continent – although much of this growth will initially be at the lower end of the value-add curve due to Africa's dependence on commodity exports. Until recently, the evolution of complex global supply chains meant that the location of least-cost manufacturing tended to gravitate towards the region with the cheapest labour, domestic stability, policy certainty, and access to a large market, typically Asia. Given reductions in input costs, the push towards reshoring and diversification and the need to reduce carbon emissions provide incentives to locate manufacturers closer to the future market in which Africa features prominently. Sub-Saharan Africa will increasingly feature as a location where industry can thrive. However, this depends upon the rapid integration of its fragmented markets, infrastructure provision, investment in improving its human capital endowment and better governance.

Eventually, regional economic communities with common currencies, freedom of movement of labour and capital across borders, and standard import and export tariffs will increase Africa's attraction as a location for manufacturing. Indeed, Africa took a big step towards this goal when its members ratified the [African Continental Free Trade Agreement \(AfCFTA\)](#).

These prospects do not hide that Africa has effectively been an instrument of global power competition since independence, reflected in the preceding analysis, although health and humanitarian relief considerations have also been prominent. Its limited influence is hardly surprising since Africa's entire economy is only 3% of the world economy. On current expectations, it will increase to 5% of the world economy by mid-century.

Rather than a more productive economy, the increase in Africa's power potential results from the continent's rapidly growing population. Nigeria, Africa's largest economy, constitutes a mere 0.5% of the global economy and will increase that portion by only 0.1 percentage points to 0.6% by 2050, reflecting its lack of international economic significance despite its large population, but not the extent to which it dominates within Africa, as its economy accounts for 16% of the continent's total.

Against that background, the following section presents four global scenarios and then examines their impact on Africa.

## Scenarios

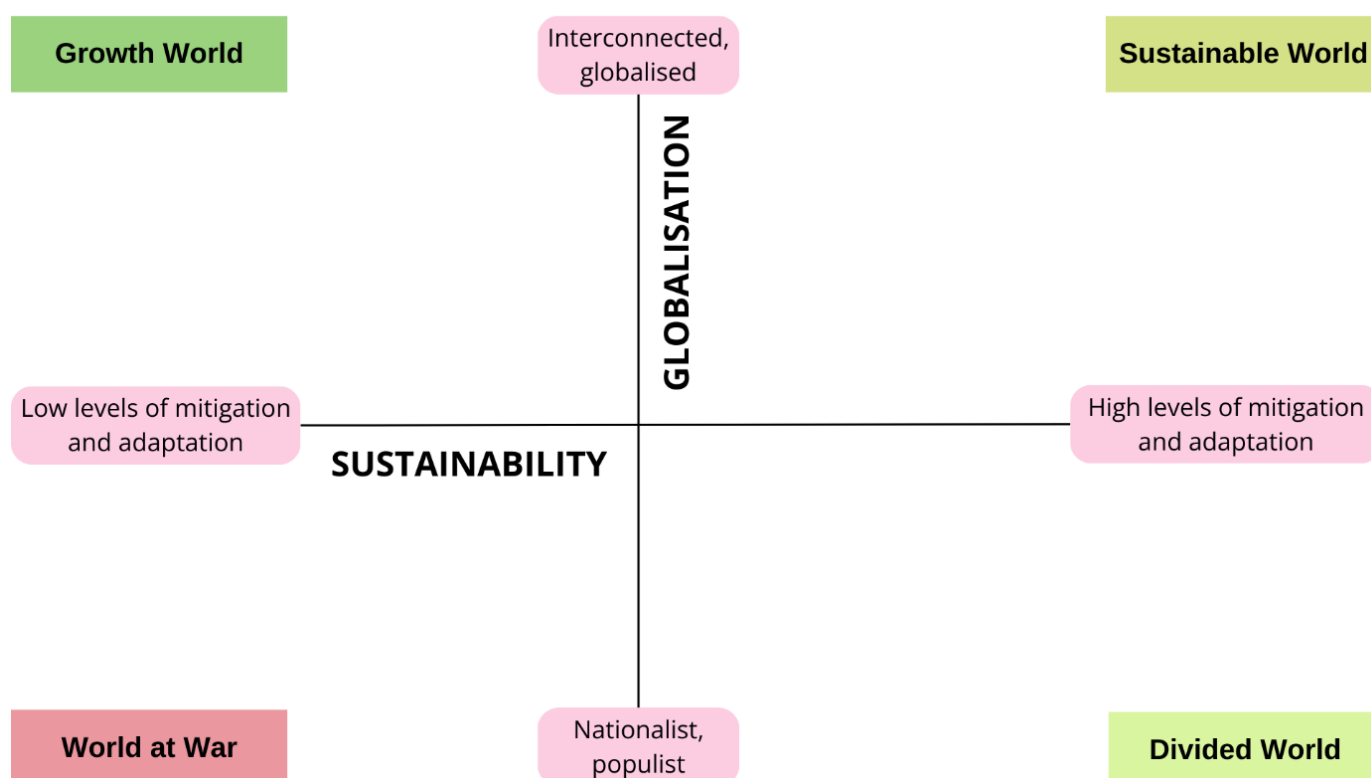
- Logic and modelling
- Divided World
- World at War
- Growth World
- Sustainable World

## Logic and modelling

We frame Africa's development within four alternative global scenarios based on the above-mentioned trends and measurements. We use two key dimensions that represent fundamental and highly uncertain forces shaping the international system, each with significant implications for development, geopolitics, and environmental resilience, depicted in Chart 4. 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) reflects the prioritisation of equitable growth, environmental stewardship, and long-term resource management versus unchecked exploitation and short-term gains.

These dimensions form a framework with four quadrants, each representing a possible future scenario based on how these uncertainties might unfold: a Sustainable World, a Divided World, a World at War and a Growth World.

Chart 4: Scenario framework



No scenario seeks to present the current global trajectory, which would inevitably be somewhere between these ideal

types but currently most akin to the Divided World scenario.

The first scenario, a **Sustainable World** scenario, prioritises sustainability, equity, and pursuing the objectives set out in the UN's Sustainable Development Goals. Rapid and ambitious regional integration lies at the heart of this scenario, successively translating into 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 amongst most countries. In this world, Africa can achieve the development outcomes modelled as the combined [scenario](#) on this website, which is associated with steady progress in accountability, democracy, and stability. The Sustainable World maximises economic growth with a 2043 global economy of US\$170 trillion (compared to US\$94 trillion in 2023), improves income, and reduces poverty. However, it is the most difficult to attain given its focus on multilateralism, environmental sustainability and equity.

In a second **Growth World** scenario, countries focus on the rapid improvements in income and returns on investment, eschewing environmental concerns, and do so within the context of a grand bargain between the US and China. Commercial and trade interests dominate, and by 2043, the world economy will be similar in size to the forecast in the Sustainable World scenario. Still, the Growth World will release 11% less CO<sub>2</sub> from fossil fuels, one indicator of the differences between these two futures. The Growth World leads to excellent economic results but to the detriment of equality and efforts to contain global greenhouse gases, resulting in negative climate change impacts, slow reductions in extreme poverty and an increase in inequality.

Instead of the continental integration characteristic of the Sustainable World, in the Growth World, African countries and regions link up with Europe, the Persian Gulf, the North American Free Trade Agreement (NAFTA) and China, signing preferential agreements with external partners. This is still, nominally, a rules-based context, although considerations regarding human rights and democracy play a relatively minor role. The AU is eventually marginal with countries and groups of countries pursuing the advantages of partnering with Europe (North Africa), the Persian Gulf (the Horn), the US (West Africa) and China (Southern, East and Central Africa). More importantly, the Growth World will have 192 million more extremely poor people than the Sustainable World, most of whom will be in sub-Saharan Africa.

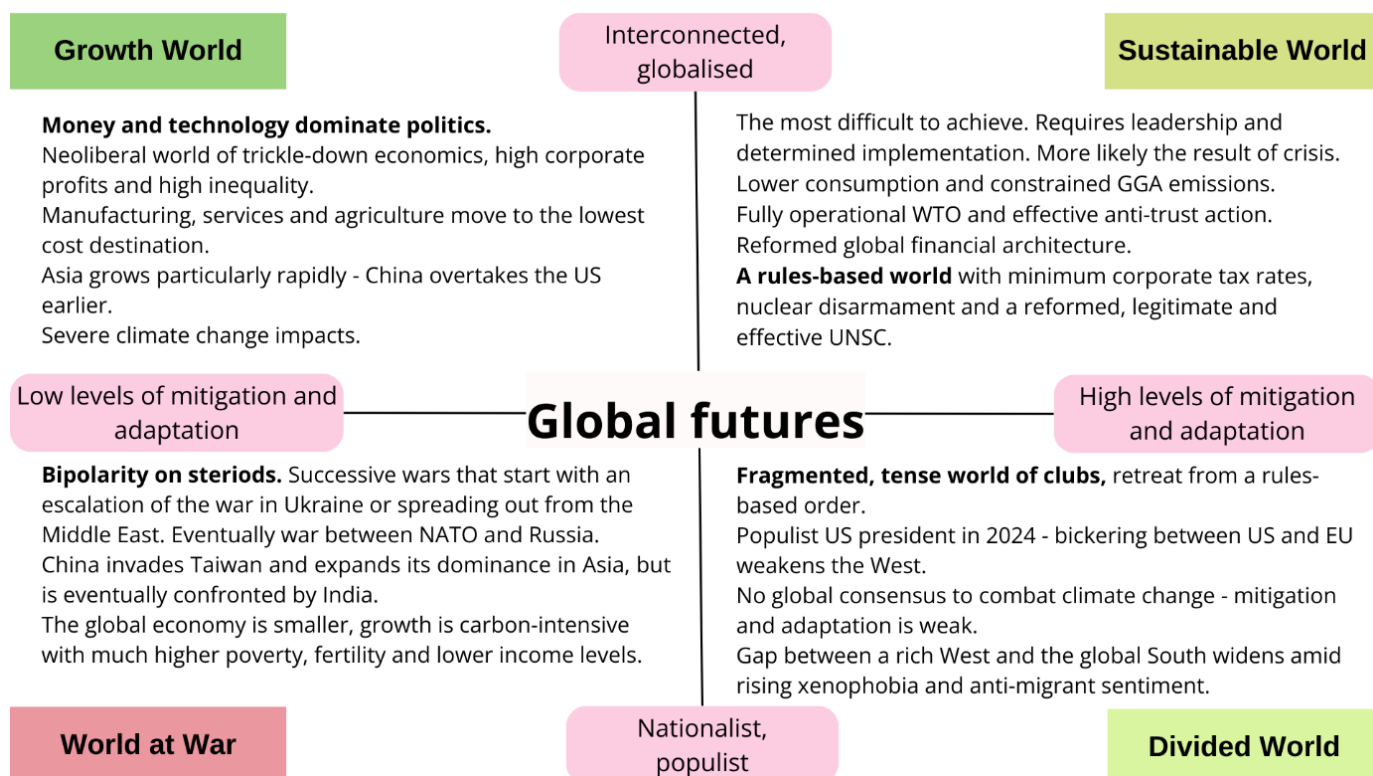
The third indicative scenario is of a **Divided World** with a future characterised by a sense of global fracturing, populism, nationalism and a retreat from globalisation — effectively, the fraying of the rules-based system as we know it, with its complex lattice of norms and institutions. Everyone 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 thy neighbour policies escalate, although there is limited trade integration at the sub-regional level. Economic growth is tepid, and poverty reduction is slow. In addition to constant interference in the domestic affairs of their neighbours and domestic oppression, Africans again allow themselves to be instrumentalised by external partners.

The fourth scenario is a **World at War**, where competition within and between the US and China dominates all aspects of the global economy, politics and relations with violent outcomes. In addition to fragmentation in Libya, Sudan and the Sahel, more African states threaten to fracture as competing armed groups vie for power, including large countries such as the DR Congo. Shut out of the prospects for more rapid development, Africans suffer. Poverty increases as economic growth is insufficient to improve incomes, given more rapid population growth typically associated with instability. The World at War scenario is the worst case for everyone, as overall gains are below any other with successive wars between major powers. Autocracy increases everywhere, and those African countries that avoid fracturing grow slowly based on their small domestic market without the advantages of trade integration. The World at War scenario results in a much smaller world economy at US\$132 trillion in 2043, with Africa growing particularly slowly despite its much larger population.

Chart 5 summarises the key characteristics of the four scenarios.



Chart 5: Summary feature of four global scenarios



The scenario currently closest to the global trajectory is the Divided World scenario, with 724 million extremely poor people in 2043, significantly more than in the Sustainable (385 million) or Growth World scenarios (563 million). Extreme poverty in the World at War scenario will be 695 million, most of which will be in sub-Saharan Africa.

Because it includes determined efforts at an energy transition to renewables, a global carbon tax and carbon sequestration through the protection and regeneration of forests, the Sustainable World scenario has the lowest carbon emissions from fossil fuels. By contrast, economic growth in the Growth World, which is marginally higher than in the Sustainable World scenario, comes at a huge cost: carbon emissions from fossil fuels peak in 2039 (at 37.7 billion tons of CO<sub>2</sub> equivalent), six years later and much higher than in the Divided World scenario which has the second highest carbon emissions from fossil fuels. The result is more severe global warming associated with the Growth World than any other scenario.

Because of slow economic growth, the growth of carbon emissions from fossil fuels in the World at War scenario is lower than in other scenarios. Still, in the long term (beyond 2044), carbon emissions in the Sustainable World scenario are the lowest.

## Divided World

The Divided World scenario reflects the acceleration of current trends towards a more fragmented global order, an associated retreat from the Western rules-based system, and China's rapid rise to become globally dominant towards the end of the forecast horizon.

Populist party successes in Germany, France, Italy, Finland, Netherlands, Sweden, Denmark and Austria followed the election of Donald Trump as US president in November 2024. Instead of pulling together, pursuing its narrow national interests rather than a common approach to China and on matters such as support to Ukraine is to the detriment of the

West. Nationalist populism eventually undermines the Western rules-based system, which is, by 2040, hardly recognisable from its current form with the US and the EU constantly bickering and pulling in different directions, providing the opportunity for others, most prominently China and Russia, to exploit these differences to their advantage.

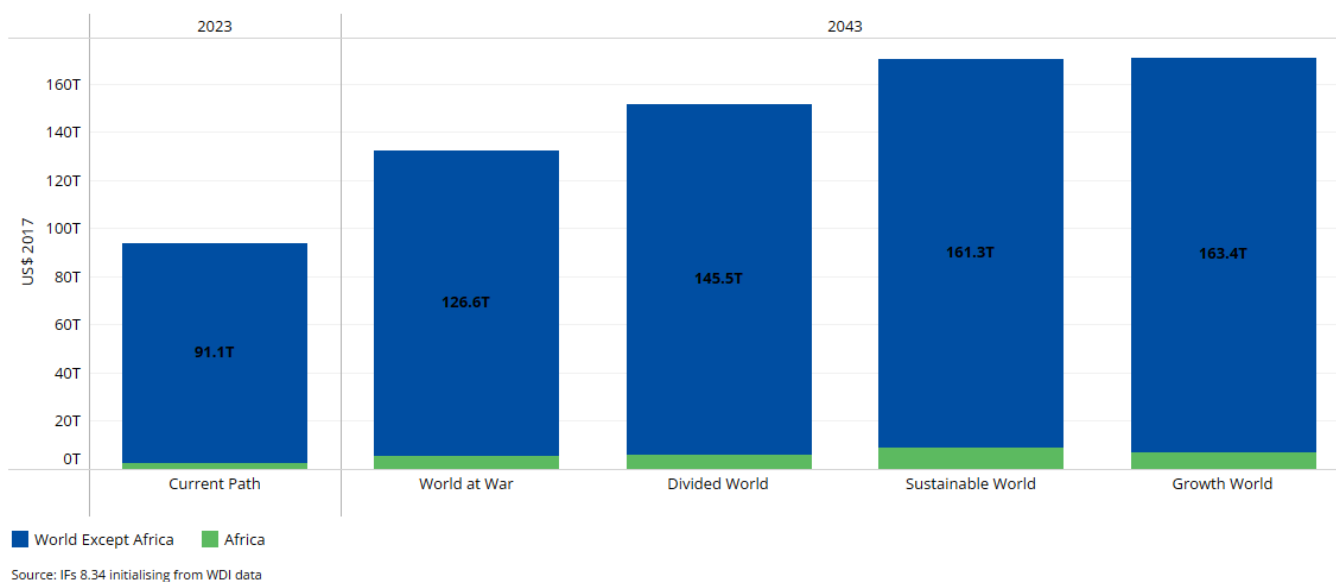
Having been driven closer due to European sanctions on Russian oil and gas, the rapprochement between China and Russia proceeded apace. The latter eventually becomes entirely dependent upon China for oil and gas exports, in addition to its exports of agriculture and minerals to countries in the Global South.

Although the EU avoids another Brexit moment, it is consumed by bickering in the wake of the end of the war in [Ukraine](#) in 2027 with the ceding of Crimea and some eastern provinces to Russia. Since the US and the EU do not act as one in this scenario, China overtakes the EU in 2024 and the US in 2038, using the Global Power Index, although not using DiME, which applies heavier weightings to technological sophistication.

On this trajectory, the steady loss in legitimacy, influence and salience of the UN proceeds apace. Non-permanent members eventually do not attend Security Council sessions in protest against the right to veto still held by permanent members and the lack of structural reform. Local solutions, including industrial subsidies and hard border control, dominate. The free movement of labour, knowledge and eventually capital is restricted. Uncertainty and insecurity mean that the number of nuclear-armed states increases as efforts to contain proliferation have long collapsed.

Nominally, an isolationist US, a bickering EU, China, India and others are constantly at odds with one another. Smaller countries in Africa, from South America and Asia try and stay out of the fight. Globally efforts at new alliances and partnerships regularly appear as countries seek the best partners to pursue their interests, but none last.

Chart 6: GDP (MER) per scenario, 2023 and 2043



India pursues its interests and alliances, including with Africa, while continuing to challenge China in Asia. Still, it struggles to gain traction for its traditional independent stance, given its worsening relations with Pakistan after New Delhi's unilateral decision in 2019 to alter Kashmir's constitutional status. In this scenario, armed confrontation along their shared borders becomes endemic.

The Asian region is particularly tense, with the Chinese invasion of Taiwan more likely given public pronouncements by US President Trump in 2025 that US soldiers would not die in defence of the island. As a result, China's subsequent

occupation of Taiwan proceeds relatively quickly and with relatively limited damage, although extensive financial and other sanctions follow.

The degree to which Russia disregarded the UN Charter with its invasion of Ukraine and Israeli defiance of the UN Security Council in 2024/5 in its war on Gaza emboldens others. In addition to the US, countries such as Turkey, Iran, India, Pakistan, Myanmar, North Korea, Saudi Arabia, UAE, Malaysia, Rwanda, Egypt and others regularly violate previously sacrosanct international norms of behaviour. Domestic priorities regularly trump the global good, including the fraying of humanitarian practices, regressive legislation and practices in respect of the widespread reintroduction of the death penalty, rolling back of progress with women's rights and even the reintroduction of practices such as female genital mutilation in Africa. The Gambia first proposed a bill to this effect in 2024, subsequently also legislated in Uganda, Somalia, and several other countries.

Perceptions in this scenario reinforce long-standing caricatures of Africa (corrupt, poor, suffering) and the West (unequal, selfish, exploitative). Chinese efforts towards an alternative global order (non-interference, mutual respect, and social order based on domestic surveillance and control) gain traction. Rather than pulling together, the African Union is divided, and an African voice is generally absent from discussions about global futures. Some countries try to remain non-aligned; others align with the West or China. There is no solid African voice or position on crucial issues ranging from peace and security to climate change and development, and more countries pivot away from democracy to pursue their version of an autocratic development future. A lack of coherence in decision-making on crucial development policies means that Africa falls further behind average development indicators compared to averages for the rest of the world.

Attitudes harden. This world is more crowded, angry and fearful, with slow growth in the Global South propelling a substantial illegal migrant movement that drives populist politics and xenophobia in Europe and North America, reducing the ability of these countries and regions to play a positive role in international politics. Africa's colonial legacy transforms into a decidedly anti-Western sentiment, and the continent is again a theatre for proxy wars between Russia and the West, and between the EU, the US and China. By 2026, France, the UK, and the US have effectively been ejected from Africa, losing access to all their previous military bases and some embassies. Whereas the US had 29 military bases in 15 African countries in 2019, by 2026, it is down to five, and by 2030, only Camp Lemonnier in Djibouti remained. Illegal migration to the EU becomes a big problem and regularly overwhelms border arrangements with violent clashes and many deaths.

In the Divided World, relations between most African and European countries deteriorate significantly, and the once close partnership between the EU and the AU is eventually a distant memory. China gains the most in this scenario with the determined pursuit of the [ambitions of Xi Jinping](#) and his vision to 'make China great again', a globally respected leader in high technology manufacturing, particularly as regards the green economy.

There is little appetite for follow-on Sustainable Development Goals (SDGs) in a Divided World. Sustainable development solutions are regional and scattered. Efforts to contain carbon emissions and combat climate change proceed apace, but they are weaker and less effective than the Sustainable World scenario, given the lack of coordinated international action. China powers ahead, however, and within a decade, it emerges as the undisputed global leader in sustainable economic space, cementing its role as the dominant supplier of batteries, wind and solar solutions, and associated technologies.

However, African countries are adept at playing China, Europe, and the US off against one another, as they have done for several decades. African subregions, such as the Southern African Development Community (SADC), deepen existing levels of economic integration, but progress with the AfCFTA stalls. Conflicts are complex, with the number of actors involved constantly increasing, frustrating African efforts at mediation. The effects of climate change are evident across Africa but most visible in the Sahel and the Horn of Africa. With its large, youthful and poor population, instability in Africa increases.

In summary, the Divided World scenario predicts a future marked by global fragmentation, where rising populism and

geopolitical tensions diminish Western influence and pave the way for China's dominance. This division undermines global cooperation and international norms, leading to a world where regional interests trump collective efforts, exacerbating geopolitical tensions, particularly in Asia, and increasing nuclear proliferation that sees Australia, Japan, Iran, South Korea, Ukraine, Poland and Germany all develop national nuclear forces. It is eventually this balance of terror that staves off mutually assured destruction at a global level. Sustainable development is sidelined in a Divided World, global governance weakens, and Africa faces heightened instability and challenges in economic integration, reflecting the broader global shift towards prioritising national over collective interests.

## World at War

Hard power competition dominates in the **World at War** scenario, which consists of successive large-scale wars and significant smaller conflicts that eventually engulf all leading and regional economies. On several occasions the use of nuclear weapons is only averted at the last minute in a context that has seen a degree of proliferation. Efforts to review the Treaty on the Non-Proliferation of Nuclear Weapons (NPT) collapsed and, in 2026, the New START treaty finally lapsed in 2026, having been on life-support since the February 2023 State of the Nation address by Russian President Vladimir Putin that his country would suspend participation.

The first large-scale conflict is the escalation of Russia's war on Ukraine into a broader military confrontation with NATO. To stave off a Ukrainian defeat and to counter the deployment of more significant numbers of troops from North Korea, France and the UK deployed combat troops into the country. Russian retaliation included attacks on logistic bases in Poland and elsewhere, setting the scene for the geographic expansion of the conflict. The war in Ukraine has already pushed Russia closer to China as the primary destination for its oil and gas exports. In April 2024, the two countries [pledged](#) to cooperate more closely to maintain international industrial supply chain stability. 'China and Russia will be more active in pursuing the convergence of their interests... and work together to maintain international industrial supply chain stability,' a ministry statement quoted Chinese Foreign Ministry Wang Yi as saying. Under full sanctions from the West, Russia has no other outlet for its fossil fuel exports upon which its economy depends.

Others that extend the China–Russia military cooperation include Iran (which has a long-standing grievance with the West), North Korea, Pakistan, and eventually Vietnam and Cambodia. For China, importing gas and oil from Russia bolsters its efforts to reduce its reliance on strategic resources from Western suppliers. Still, it remains dependent on oil and gas from the Middle East.

Russia and China do not enter a formal military alliance to oppose NATO. Still, military cooperation is close, building on the statement by Chinese President Xi Jinping and Russian President Vladimir Putin in February 2022 that their partnership has 'no limits' as the two vowed to deepen cooperation on various fronts. Already, in 2022, NATO added China to its perceived threat environment.

China bides its time and readies for an invasion of Taiwan but eventually desists following the announcement that the renegade island had developed an own nuclear capacity. Previous efforts towards such a capacity in the 1970s and 1980s were stopped by the US, but a third attempt now succeeds with covert support from the US.

A second trigger for the World at War scenario originates in the Middle East. Following the horrific terror attacks by Hamas on Israel on 7 October 2023, the Jewish state lashed out in Gaza, the West Bank, Lebanon, Syria, Yemen, the Red Sea, the Arabian Sea and eventually Iran. The US, which had tried to resist the growing regional conflagration, going so far as to support UN Security Council decisions that sought to constrain and eventually condemn Israel, is drawn into steady escalating military support for its ally, eventually alienating long-standing partners such as Saudi Arabia and Egypt where popular sentiment force both countries to abandon their efforts at moderation.

The first indication of what is to come is the collapse of the Abraham Accords of 2020, which briefly normalised relations between Israel, the United Arab Emirates, and Bahrain. Eventually, it is separate deadly attacks by Houthis and the Islamic State in the region, including clear evidence of the extent of military support to Iran from Russia, that tip the scales into a bloody confrontation - opening up a front extending from Ukraine to the Middle East with the US too stretched to ensure Israel's security. After a decade of war and with a weakened US, Israel eventually agreed to a two-state solution along the lines of the [1967 delimitations](#) having come perilously close to the use of its nuclear arsenal on several occasions.

A third trigger (or successive regional war) is border conflict, which eventually leads to a war between India and China. Although India will continue to have significantly fewer power capabilities than China across the forecast horizon, the two are increasingly regional and global power competitors with a shared long border. The significant disparities in their material power capabilities make this only likely towards the end of our forecast horizon.

In addition to direct conflict, the often violent rivalry between Chinese-supported, nuclear-armed Pakistan and India over Kashmir could also trigger conflict between China and India, particularly if the two look to balance their relations with Washington and Beijing. India already fought a brief war with China in 1962, and India and Pakistan have had numerous border skirmishes and military stand-offs.

In this world, India's alarm at Chinese assertion and aggression, particularly in the South China Sea, sees it align itself more closely with the West to balance Islamabad's close relations with Beijing. In a starkly bipolar world, there would be less space for India's traditional non-aligned orientation.

Complicating matters is New Delhi's cordial but guarded relations with Russia, from which it buys most of its weapons.

The defining characteristic of the World at War scenario is the division of the globe into two poles with little space for others — a return of global relations to a bipolar era reminiscent of the height of the Cold War but on steroids. The US House of Representatives passed the Countering Malign Russian Activities in Africa Act on 27 April 2022 as a clear sign of where things could go. After approval by the Senate, it was signed into law by President Trump in 2026, placing African countries that trade with Russia and are perceived to have close relations with it, such as South Africa, under sanctions. China is in a different league from the former USSR, however. In 2024, China was already the [largest trading partner](#) for more than 120 countries and regions, including the US and the EU. Its economy is already more significant than the US's, using purchasing power parity, and in this scenario the Chinese economy surpasses the US in 2037 at market exchange rates. By 2043, the Chinese economy will be 7% larger than the US economy in market exchange rates and nearly 31% larger in terms of purchasing power parity.

The intense competition and even conflict between a declining US and rising China in this scenario will affect every country and region in the world, even as struggles for self-determination and independence intensify, such as efforts by the Kurds to establish their homeland, the ongoing struggle of the Palestinians to escape the yoke of Israeli repression and occupation, and in regions such as the Sahel in Africa.

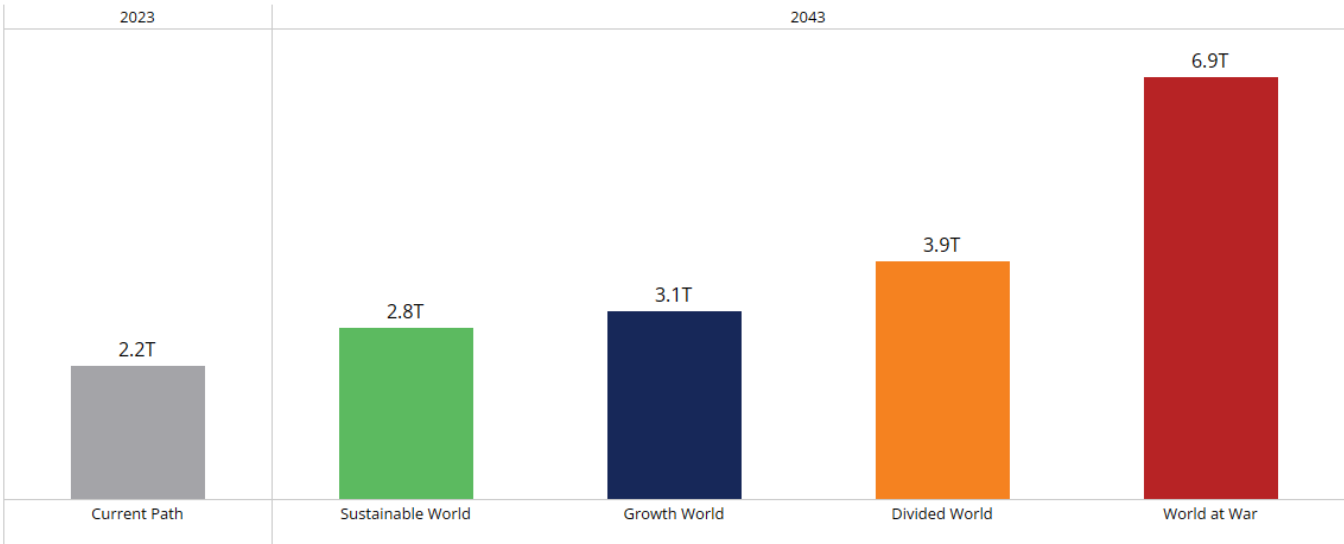
Africa becomes a key area of strategic and sometimes violent competition for control of its strategic mineral resources in the World at War scenario. Still, it remains unable to benefit from its beneficiation. China has been a first mover in securing a supply of the strategic minerals required to transition to a renewables-based future, including lithium, nickel, cobalt, manganese and palladium. Chinese companies were the only ones willing to invest in a country like the DR Congo for years. As a result, by 2021, Chinese companies controlled 60% of global cobalt reserves and 80% of the world's cobalt refining capacity, which helped China secure a significant lead as an electronic vehicle battery maker to the extent that a single Chinese company, Contemporary Amperex Technology Co., Limited (CATL), controls one-third of the entire [global battery market](#).



Chart 7 depicts world military expenditure. Whereas it averaged 2.3% of GDP in 2023, by 2043, it will have increased to 5.3% in the World at War scenario and 2.6% in the Divided World scenario. Instead of spending US\$2.8 trillion on the military in 2043 (in the Sustainable World scenario), the world will spend more than double that amount at US\$7 trillion. From a low base military expenditure in Africa increases more than fivefold from US\$53 billion in 2023 to US\$264 billion by 2043.



Chart 7: Military expenditure per scenario, 2043



Source: IFs 8.34 initialising from SIPRI data

As arms purchases and the number of arms increase, Africa is again flooded by surplus weaponry, older stocks are replaced with more modern armaments, and countries upgrade and replace their systems, as happened at the end of the Cold War. The ready supply of weapons threatens the rupture of several additional African countries on top of the divisions in Libya, Sudan, Nigeria, Ethiopia and Cameroon.

Democracy declines globally and Africans are pressured to choose sides to the extent that problems emerge in the interoperability of the Internet, which is now segmented into regional fiefdoms. The momentum towards the AfCFTA and trade integration at the subregional level fails. Each country does the best that it can, on its own.

Instead of African states being able to secure their territories and borders, in the World at War scenario, the Islamic State further spreads its influence to establish the caliphate's future after being defeated and driven out of Syria and Iraq. Already, in 2022, at least 20 countries directly experienced the group's activities, with more than 20 others used for logistics and to mobilise funds and other [resources](#). In this scenario, Iran and Russia play an important role in funding, supporting and expanding terror in Western-aligned African countries.

In summary, the World at War scenario predicts a future defined by intensified global military conflicts, including significant wars among major economies and nuclear exchanges. The breakdown of nuclear non-proliferation treaties and escalating tensions, particularly between NATO and Russia and between China and India, underscores a shift towards a bipolar global division reminiscent of the Cold War but much more intense. This era of hard power competition sees the US and China as central figures, with Africa becoming a strategic battleground for mineral resources and military influence, leading to a dramatic increase in military expenditures and armament. The scenario highlights the dire consequences of global divisions, emphasizing the need for strategic alliances and the significant impact of leadership decisions on global stability and regional conflicts.

## Growth World

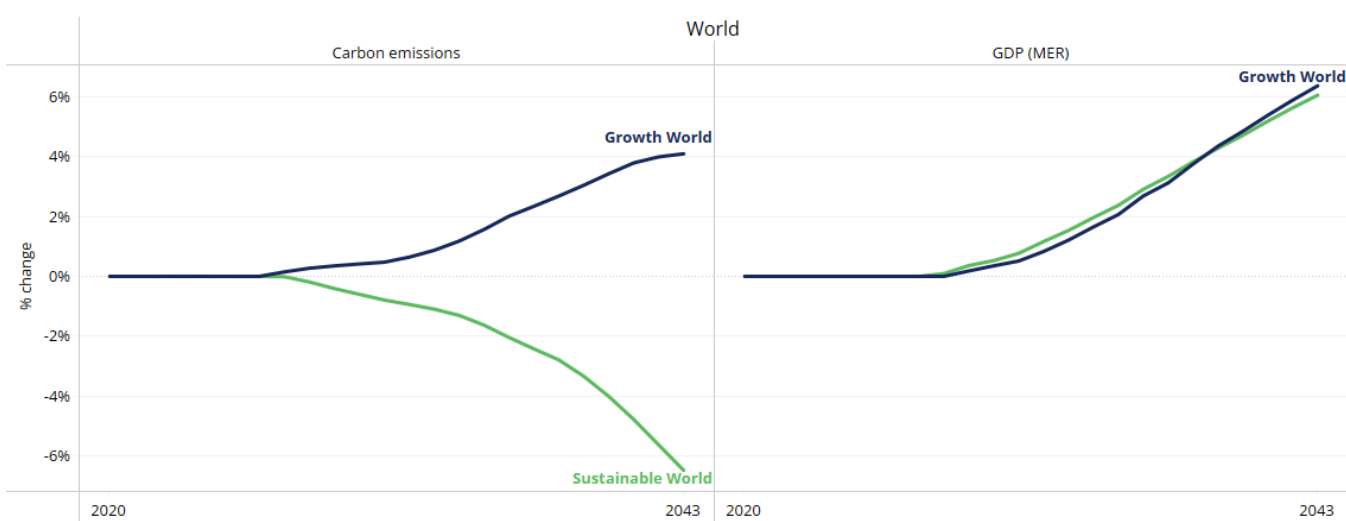
Neoliberal, trickle-down economics and increased corporate concentration characterise the **Growth World** with little care for the environment. This high-growth, unequal world would see slow reductions in extreme poverty and a rise of the power and influence of private capital. The rich get richer and the poor suffer. Efforts to introduce minimum tax rates for corporations, which started in 2021 when 136 countries agreed to implement a 15% global minimum rate, do not get off the ground. Instead, large corporations, originally particularly characteristic of the US, increase their power and profits everywhere including in the EU that was previously a bastion of anti-trust legislation. All profits flow back to the corporate head offices of a handful of global behemoths.

The US and the EU both step away from anti-trust efforts that could reign in anticompetitive behaviour and through mergers, major industries consolidate their presence in the services, finance and manufacturing sectors. Lack of competitiveness lets companies lower wages, increase prices and dilute the quality of their products. The practice of tax avoidance through profit shifting to low-tax jurisdictions effectively leads to a race to the bottom as countries compete to attract foreign direct investment. Developing countries suffer in the process as monies are drained away to tax havens and least-cost locations. Unemployment reaches unprecedented high levels in poor countries with large pools of low-skilled labour.

Chart 8 shows the rapid growth in world GDP in the Growth World scenario, passing US\$170 trillion by 2043 and the simultaneous rise of carbon emissions to the end of the forecast horizon. In contrast to the Sustainable World scenario, income growth comes at the cost of a rapidly deteriorating environment and growing inequality.

Chart 8: GDP and carbon emissions per scenario, 2020-2043

% change vs the Current Path



Source: IFs 8.34 initialising from Appalachian State University and WDI data

Competition between China, the US and Europe changes. The unexpected death of Chinese President Xi Jinping in 2026 reverses the tightening of central social, political and economic control from Beijing, and his successor relaxes the harsh clampdown on economic and political freedoms that had come to characterise Xi Jinping's third five-year term as the nation's president. China is rewarded by massive inward investment when the US enters into a Grand Bargain with its former foe in the final year of the second Trump presidency. The restrictions on ownership and investment in Western countries disappear almost overnight as business leaders scramble to cash in on the largest global market. Instead of contracting, global value chains expand, and the period of reshoring and friendshoring manufacturing in 2022/5 is, by 2030, a distant memory. The lowest-cost considerations again drive the location of factories and manufacturing. Instead of moving from China to surrounding countries with lower labour costs, the extent of state subsidies, excellent infrastructure,

and numerous incentives see China strengthen its position as the world's high-technology factory, most prominently regarding generative artificial intelligence.

Skilled migration to China resumes, and other countries that provide quality of life, security for investment, and the required information technology attract the best and brightest. Companies now compete in an unregulated global market to provide high-end services without establishing a legal presence or paying taxes elsewhere. The Chinese economy grows more rapidly in the Growth World than in any other scenario. However, as incomes rise, domestic pressure for more freedom and growing inequality make China's future more unpredictable.

With a focus on maximising profit and the extraction of rents, the saliency of the United Nations, its Security Council and various agencies readily decline in this scenario. Rich countries adapt to the impact of climate change, but the developing world suffers. Instead of the AfCFTA, African subregions link up externally, such as North Africa with the EU, several West African countries enter into agreements with the US, countries in the Horn of Africa with the Middle East, and those in East and Southern Africa with China. Central Africa trails behind. More significant migration flows inevitably follow. Peacekeeping is a lucrative business in this world, now outsourced to private companies and developing countries with large populations. Instead of through the UN, peacekeeping is funded bilaterally with richer countries keen to secure their investments in unstable areas.

In summary, the Growth World scenario illustrates a future dominated by neoliberal economics and corporate power, leading to significant global GDP growth and environmental degradation, with large corporations bypassing efforts to implement global minimum tax rates and anti-trust legislation, further exacerbating inequality and unemployment. This world sees China's economic and political landscape transform following Xi Jinping's unexpected death, resulting in massive inward investment and a shift towards less regulated global markets. In contrast, the developing world, including Africa, faces the increased effects of rapid climate change and external economic dependencies.

## Sustainable World

In the **Sustainable World** scenario, the international community balances growth and distribution by reducing overall consumption and constraining greenhouse gas emissions through, amongst others, a differentiated global carbon tax (examined in our theme on [Energy](#)) that contributes to Africa's energy transition. Collaboration and norm development extend across multiple sectors, including a resurgence in the role of the World Trade Organization (WTO), the introduction and steady increase of a global minimum corporate tax rate, which stands at 20% by 2043.

This future is most likely to emerge from a crisis, such as the impact of the World at War scenario, the rapid acceleration of the effects of climate change and repeat global pandemics that forces a reluctant world to adopt a collective response. Already, in June 2023, UN Secretary-General Guterres [warned](#) that the world would hit 1.5 degrees Celsius warming above preindustrial levels by early 2030 and that the Earth was on a trajectory towards two to three degrees Celsius by 2100.

A Sustainable World could even originate in the US due to the corporate profiteering and excesses evident during the second Trump presidency. In this scenario, US politics swing violently against the corrosive power of money during the 2029 presidential elections with the election of a progressive independent who restores democracy. In subsequent years, the US pursued aggressive antitrust policies to increase competition and rein in the damaging effect of private monies on domestic politics.

In terms of great power competition, a Sustainable World scenario is likely associated with an expanded and more influential EU in addition to constraints on the role of money in US politics. Different from the US and China, the EU has

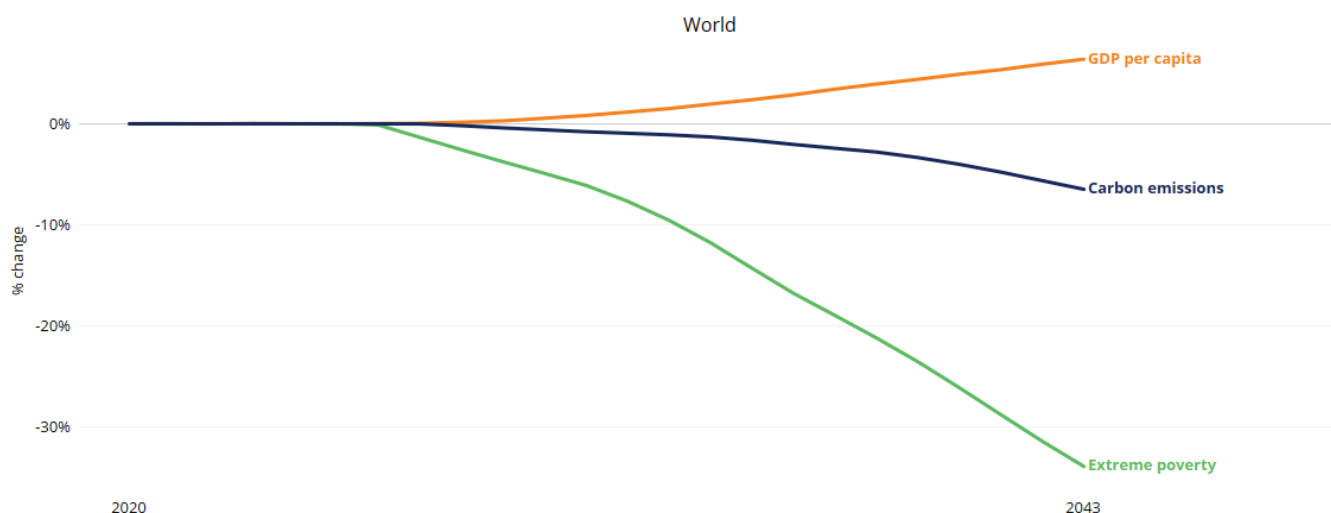
limited hard power and prioritises its role as an advocate of a global rules-based system, reflected in its approach to digital sovereignty, harmonised rules on fair access and use of data that protects individual rights and democratic freedoms, amongst others.

The Sustainable World scenario is the most difficult to achieve. Unlike the other three scenarios, leaders with little in common must take bold steps to realise a better world that will inevitably run into significant domestic resistance. It is only possible with the realisation within the EU and the US, working with countries such as China and India, that a future rules-based system will eventually require rethinking all aspects of global collaboration and governance, including the role and decisions at the International Financial Institutions and an overhaul of the UN Charter including the composition and workings of the [UN Security Council](#).

Under the auspices of the UN, this scenario would see countries craft and agree on an ambitious set of follow-on Sustainable Development Goals to eliminate extreme poverty in the most affected region, sub-Saharan Africa, which is also under significant threat from climate change. These follow-on goals and targets merge climate mitigation and adaptation ambitions into an overarching and comprehensive Global Sustainability Framework 2050 (GSF) 2050. Part and parcel of the GSF 2050 is a new push for aid to low and low-middle-income African countries. Whereas aid to Africa amounted to US\$64 billion in 2023 (2.4% of Africa's GDP), by 2043, it has increased to US\$104 billion, although now accounting for only 1.2% of Africa's much larger GDP.

Commitments of this nature mean the world can sustainably pursue poverty alleviation, reduce carbon emissions and advance environmental protection. Chart 9 shows the dual impact of the Sustainable World scenario on global poverty and carbon emissions. Extreme poverty in Africa falls from 437 million (29% of the population) in 2023 to 225 million (10%) in 2043. Globally, carbon emissions from fossil fuels peak in 2032 at 10 billion tons of carbon (36.6 billion tons of CO<sub>2</sub> equivalent) and, by 2043, have declined to 9.1 billion tons (33.4 billion tons of CO<sub>2</sub> equivalent).

Chart 9: Carbon emissions, GDP per capita and extreme poverty in the Sustainable World scenario, 2020-2043  
% change vs the Current Path



Source: IFS 8.34 initialising from Appalachian State University and PovcalNet data

In this world, an expanded G20+ has eclipsed the G7 and the BRICS and coordinates responses to global turbulence, such as recurring pandemics that are a feature of a 2043 world with 9.3 billion people. This is a rules-based future that eventually includes a revision of voting rights in both the World Bank and the International Monetary Fund, and an end to

permanent membership and the veto within the UN Security Council. By 2043, a **reformed Council** consists of powerful countries with increased voting rights, groups like the EU, and a rotational system of other members. However, it remains a council of states that does not include non-state actors such as civil society or business.

Nuclear disarmament also proceeds apace. In July 2022, 122 countries adopted an international treaty banning nuclear weapons. The treaty makes it illegal for signatories to develop, test, produce, manufacture, acquire, possess, stockpile, transfer, use or threaten nuclear weapon use or to encourage anyone to engage in these activities. In the Sustainable World scenario, the UK and France, then the US, China, Russia, India and Pakistan eventually signed and ratified the treaty, followed by others, including Israel and Korea, the latter shortly after unification.

In retrospect, the momentum for the nuclear-armed states to join started in 2022 with the review conference on the Treaty on the Non-Proliferation of Nuclear Weapons (NPT). It followed the extension of the New START treaty between the US and Russia, initially set to expire in 2026.

The AfCFTA is fully implemented in Africa by 2033 and discussions on deeper economic and political integration follow. By 2043, Africa has progressed significantly towards establishing a continental customs union, with subregions such as the Southern African Customs Union (SACU) having even found a common market. All countries are democratic, and regular elections see a steady turnover of leadership as Africans hold their leadership to account.

In summary, the Sustainable World scenario envisions a future where global cooperation leads to balanced growth, reduced consumption, and significant progress towards environmental sustainability, including a strengthened role for the WTO and an increased global minimum corporate tax rate. This scenario, emerging from crises like climate change and global pandemics, would necessitate ambitious global governance reforms, including the implementation of a new compact (the GSF 2050) aimed at eliminating extreme poverty and significantly reducing carbon emissions. It foresees an era of enhanced global cooperation, with the EU playing a pivotal role in advocating for a rules-based system, and a fully implemented AfCFTA that propels Africa towards greater economic and political integration, supported by increased aid and a commitment to nuclear disarmament.

## Impact on Africa

The primary driver of the divergent outcomes for African countries in the four scenarios is the success or failure of integration efforts such as the AfCFTA. But before proceeding with the differences, it is important to recognise the continent's complexity.

Most African countries have small populations and economies. In 2023, only seven countries had economies larger than US\$100 billion, while 18 were less than US\$10 billion. While a few countries, such as Nigeria, have large populations, 21 African countries had fewer than 10 million people in 2023. Africa is also divided politically, and the imprint of Belgian, German, Spanish, Portuguese, British and French colonialism continues to affect domestic and foreign policies as well as the poor governance often characteristic of its elderly ruling elites. Because the various regional organisations such as ECOWAS and the African Union have no supranational powers, Africa seldom speaks with one voice on international issues.

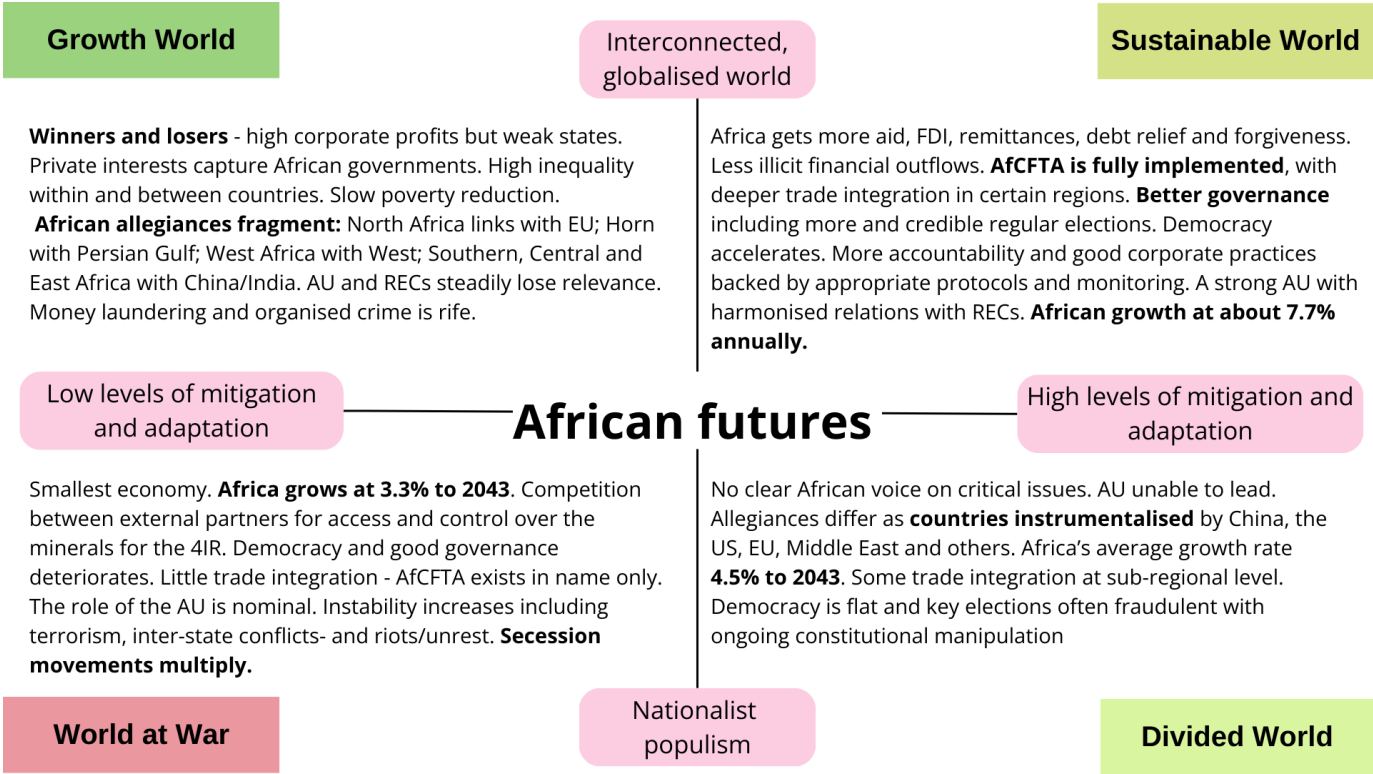
In 2023, Africa constituted less than 3% of the world economy in market exchange terms. Despite rapid population growth, Africa will only constitute 5.1% in 2043 in the Growth World scenarios, which, together with the Sustainable World, deliver the most rapid economic growth. Meanwhile, its population will increase from 18% to 24% of the global population. The size of the world economy will increase to US\$170.1 trillion by 2043 in the Growth World scenario, closely followed by the Sustainable World scenario at US\$169.6 trillion, but with significant differences in the number of extremely poor people, the majority of whom will be in sub-Saharan Africa. A Divided World would result in global economic output of US\$151



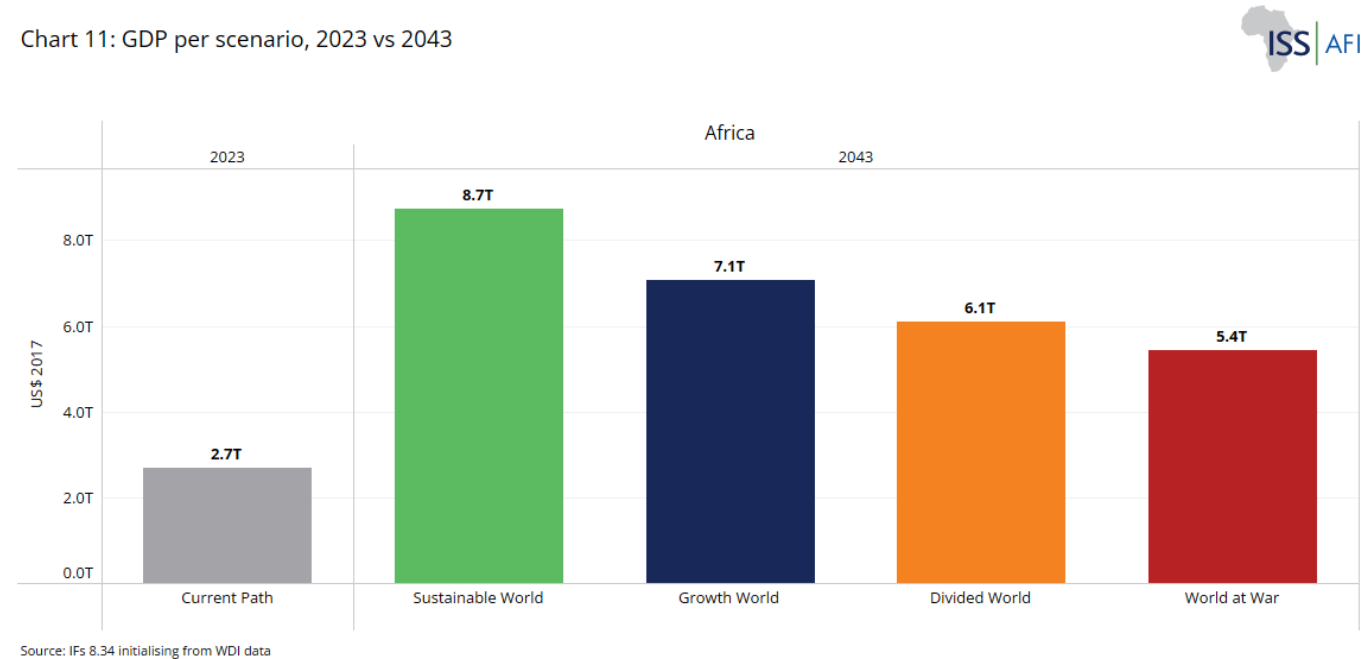
trillion in 2043. A World at War scenario results in a world economy producing a combined GDP of only US\$132 trillion in 2043, with Africa growing particularly slowly despite its much larger population.

The key characteristics associated with the four global scenarios for Africa are summarised in Chart 10.

Chart 10: African scenario characteristics associated with each global scenario



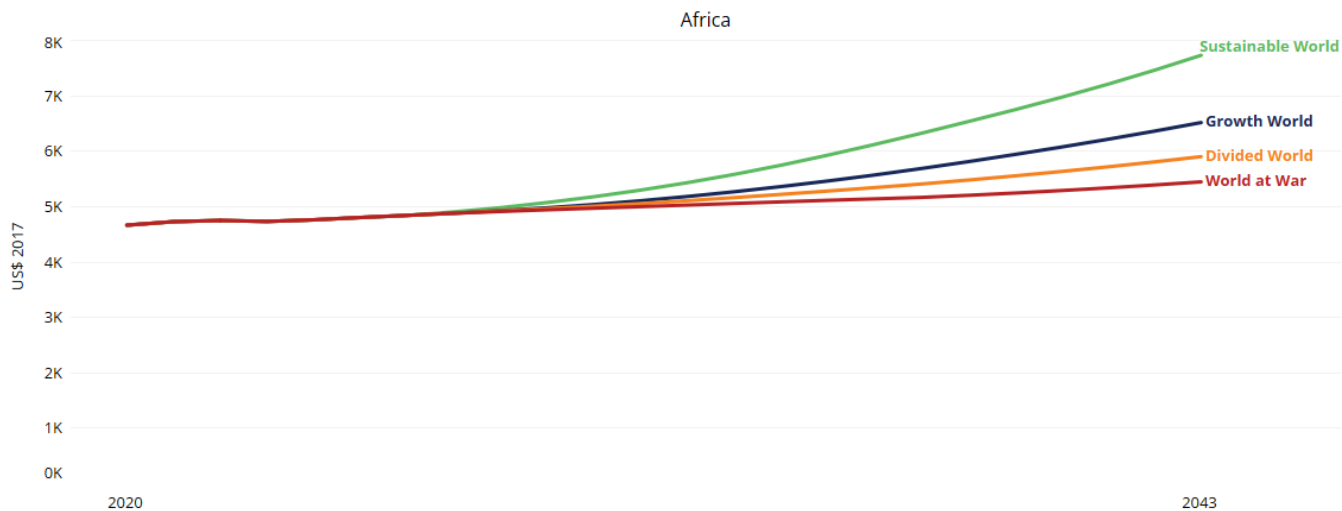
Africa gains most in the Sustainable World, both in terms of the size of its economy (see Chart 11) and of its average GDP per capita (see Chart 12).



The nature of this type of ‘big picture’ analysis inevitably glosses over the different impacts that each scenario has on individual African countries. For example, the countries that get the most significant income increase—in the Sustainable World scenario—are Seychelles, Eswatini, Mauritius, Botswana, and Djibouti, experiencing more than a US\$5 000 increase in GDP per capita in 2043 compared to Africa’s current development forecast. By 2043, nineteen African countries have extreme poverty rates below 3% of their population compared to only seven in 2023.



Chart 12: GDP per capita per scenario, 2020-2043



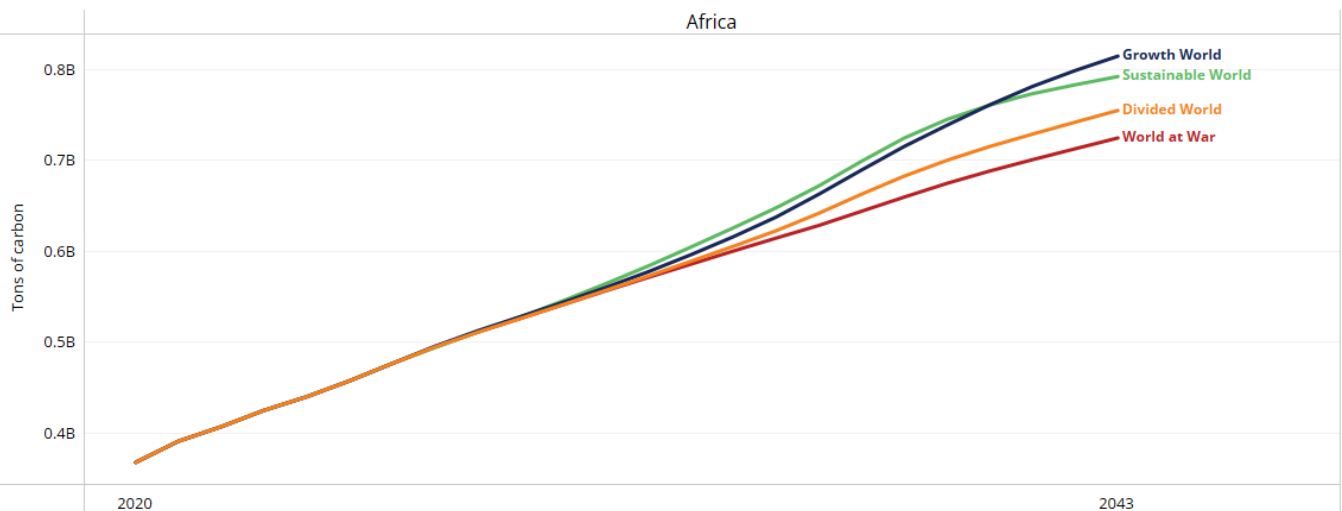
Source: IFs 8.34 initialising from WDI data

Carbon emissions from fossil fuel use in Africa will increase in all four scenarios, given Africa's current low levels of energy availability and growing population. Because the rate of economic growth in the Sustainable World scenario is significantly more rapid in Africa than in the Growth World scenario. Carbon emissions from fossil fuels in Africa are lowest in the World at War scenario which has much lower economic growth rates and higher poverty than other scenarios.

The [climate](#) and [energy](#) themes provide additional analyses of carbon emissions and Africa's energy transition.



Chart 13: Carbon emissions from fossil fuels per scenario, 2020-2043

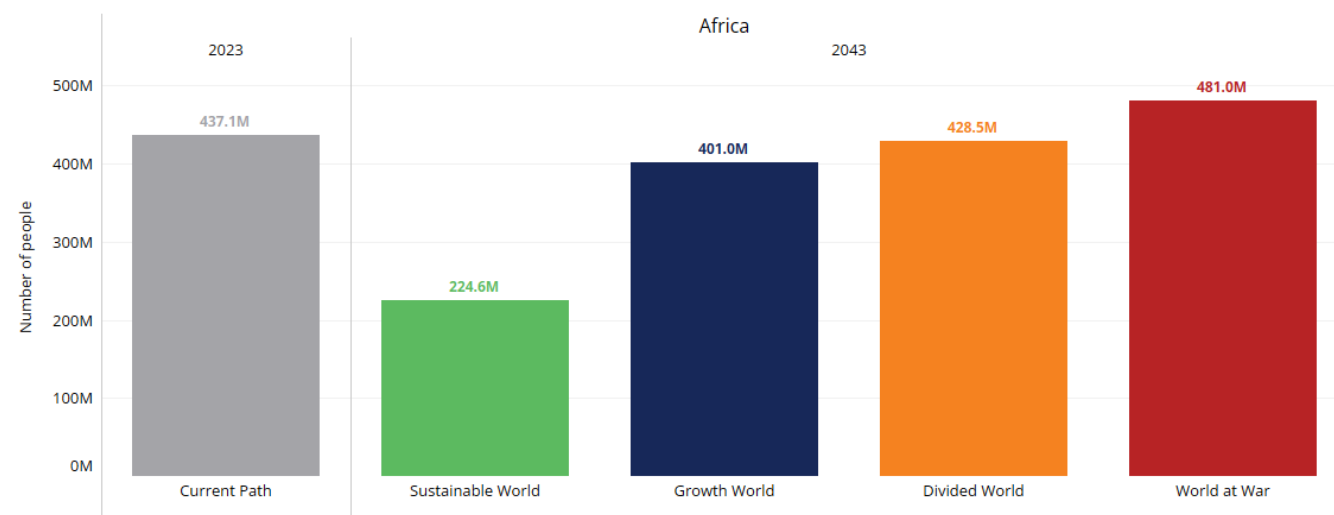


Source: IFs 8.34 initialising from Appalachian State University data

The differences in economic well-being are particularly evident in Sub-Saharan Africa, the region with the largest poverty burden globally at 434 million people in 2023, equivalent to 34% of its population. The extreme poverty rate in Sub-Saharan Africa will decline rapidly to 12% in the Sustainable World and be highest in the World at War scenario at 24%, equivalent to 224 and 479 million people, respectively. Note that Charts 14 are for Africa, not Sub-Saharan Africa.

Chart 14: Extreme poverty by scenario, 2023 and 2043

Number of people



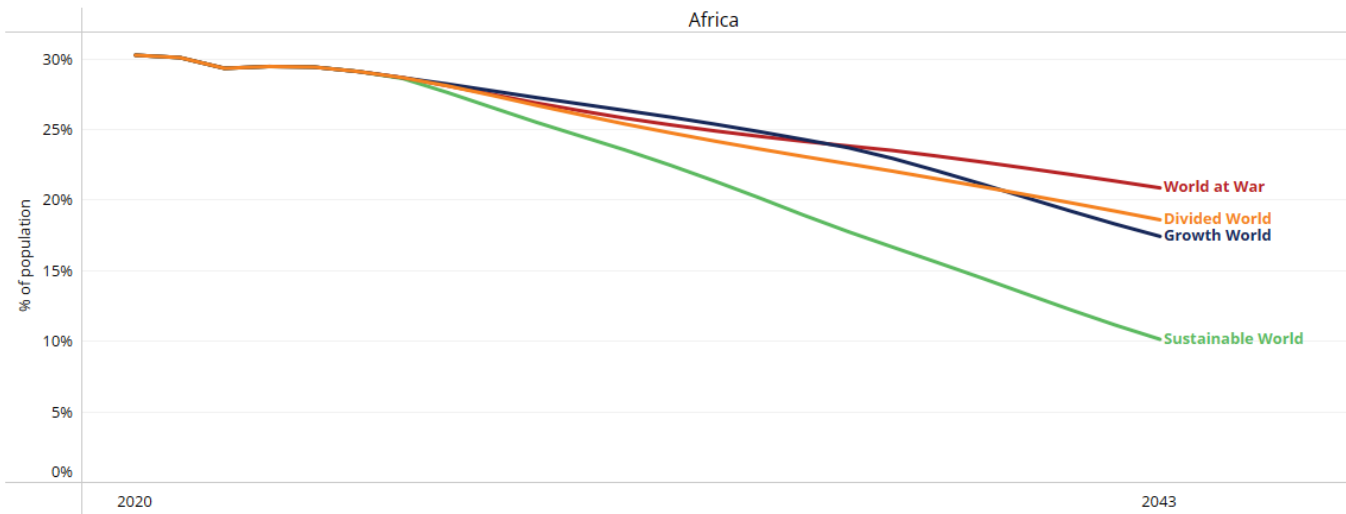
Source: IFs 8.34 initialising from PovcalNet data

In the Sustainable World scenario, inequality in Africa decreases by six per cent between 2023 and 2043 despite rapid economic growth that, under normal circumstances, tends to increase inequality. The reason is that for Africa the Sustainable World scenario increases a large social grant programme as well as gender empowerment and greater participation of women in the workforce, leading to better outcomes on indices that reflect income distribution.

A closed, rigidly divided world (the World at War and even the Divided World) will not benefit Africa. Africa did not do well during the Cold War, and instability increased significantly in the years leading up to the collapse of the Berlin Wall in 1989. The pattern could likely repeat itself in these two scenarios, which is worrying as the current global trajectory is closest to the Divided World scenario.

Russia's invasion of Ukraine and events in Gaza have accelerated global divisions. In the former, a permanent member of the UN Security Council that is mandated to ensure international peace and security has invaded another and in the latter, Israel violates international law and ignores Council decisions. Views differ, however. Westerners typically support Israel and are typically more pessimistic than people from Asia, which is understandable since power and economic weight will continue to shift eastward in all four scenarios. Still, a lot depends on what happens between the US and the EU, the choices made by India, the extent to which China and Russia cement a potential alliance, and who joins them.

Chart 15: Extreme poverty per scenario, 2020-2043  
% of population



Source: IFs 8.34 initialising from PovcalNet data

Furthermore, the choices made in areas such as digital sovereignty will have a long-term impact. Does Africa pursue an approach with an emphasis on the rights of the individual on the one hand, as is the case in Europe, or the prioritisation of the collective interests of the state on the other, as is the case for China? Or does Africa allow for private sector competition that drives costs down and allows the continent to pursue the least-cost solution (such as the approach of the US), but which leaves little room for Africa's private sector without clear policies on domestic investment? For example, procurement choices on digital infrastructure could create a path dependency with geopolitical implications. African governments with low state capacity, large youthful populations and characterised by insecurity may, for instance, prefer the state-centred stability approach of China over the EU's orientation towards individual rights and democratic freedoms.

Africa will significantly close the gap with other regions in the Sustainable World scenario regarding electricity access, literacy rates, the human development index (HDI) and malnourishment. Higher life expectancy, better literacy rates and education follow. However, given its historical deficits, it will still rank at the bottom compared to other regions. In contrast to the Growth World, the Sustainable World balances significant economic gains with greater equality and a smaller carbon footprint.

Given its marginal position in the global economy, a large and growing population and the impact of climate change on Africa, the Growth World scenario and its associated high carbon emissions are disadvantageous to the continent. The World at War is a lose-lose scenario for all countries, and the current trajectory towards a Divided World constrains Africa's growth and development. For example, our analysis indicates that Africa's 'development potential' in the Divided World scenario is only 76% of that in the Sustainable World, using GDP per capita as an indicator.

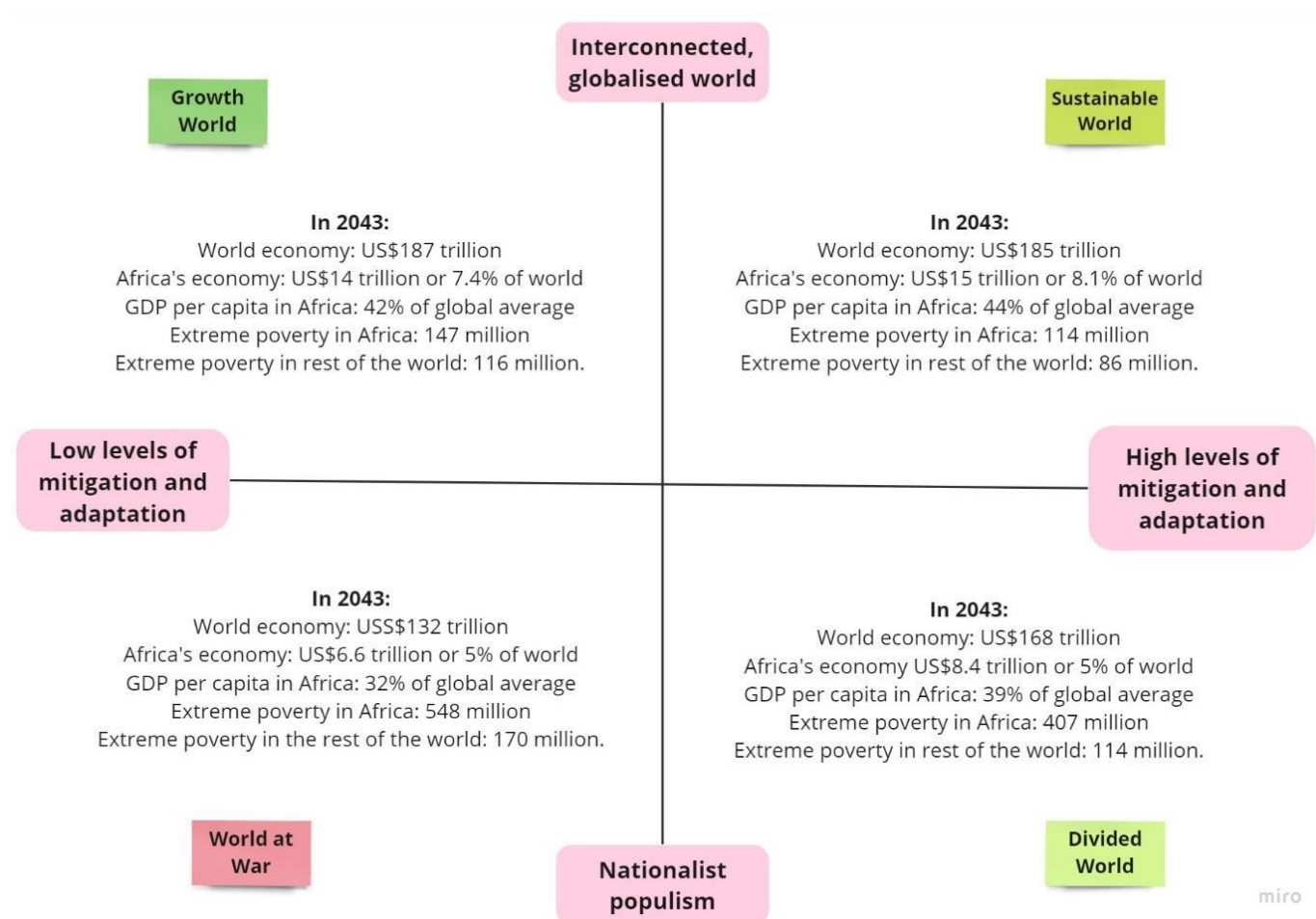
In material power terms (using GPI or the DiME Index), Africa remains a minor player in international affairs, regardless of the scenario — and the reader is reminded about the large number of African countries that constitute the continent, meaning that the effective exercise of 'African' power is invariably lower than the sum of all its countries. For example, the tripling of Africa's GDP in the Sustainable World scenario from its 2023 size means Africa will see its share of global power increase by a mere two percentage points from its 2023 level to 6.6% of the worldwide total in 2043, using the DiME Index and 4% using GPI.

Still, as a collective, the African continent could carry more weight towards the middle of the 21st century in the

Sustainable World scenario. If the African Union could speak with one voice globally and maintain that unity, Africa would become a swing region with significant soft and discourse power mainly because of its large population numbers and the collective voice of its 55 member states.

Meanwhile, the current trajectory towards a Divided World places a cap on Africa's development potential. Compared to the Sustainable World, GDP per capita in Africa will be 24% lower (US\$5 907 vs US\$7 738), and extreme poverty in Africa will be 91% higher (429 vs 225 million), reflected in Chart 16.

Chart 16: Comparing scenario impact on economic size, GDP PC and extreme poverty



## Wildcards and Megatrends: Great power implosion, technology and climate change

The four scenarios presented in this study and the associated African scenarios could be upended by any number of developments, particularly the impact of a **great power implosion**, **regional developments** in Europe or Asia, and **technology**, generative artificial intelligence in particular.

In *How Civil Wars Start: And How to Stop Them*, Barbara F Walter presents internal conflict and competition within big powers as one of the gravest threats to global peace, particularly the likelihood of a second civil war in the US. Academic reviews of her work indicate that she has exaggerated the threat posed by political polarisation in the US. For example, [Moyer, Matthews and others](#) find that wealthier, politically consolidated states (all of which are democratic) typically have more civil conflict onset associated with minority repression, not evident in the US, than any other cluster of motivated variables.

The US is already starkly divided and increasingly violent, as seen in January 2021 with the effort at an unconstitutional

power grab after Donald Trump lost the presidential elections. The re-election of Trump as the 47th president in 2024 means that the West is in deep trouble, as seen from the perspective of a partnership amongst liberal democracies to constrain China's growing power and influence. Already evident early in 2025, Trump's approach to the rest of the world will strengthen the hand of autocrats everywhere, undermine the global rules-based system and eventually accelerate the relative loss of power and influence of the US. It will accelerate the trend toward a Divided World or even the World at War scenario but could open up the door towards a Growth World should the US pursue a Grand Bargain with China.

A variant of **great power implosion** in China and Russia would likely follow democratisation in either or both. In the case of Russia, which will experience a steady diminution of its material power base in all scenarios, disruptive change is almost sure to follow the end of the presidency of Vladimir Putin, who has ruled since 1999. While change in both countries, also in North Korea, and the democratisation of oil-rich Middle Eastern countries may be desirable from a liberal and normative perspective, all will likely come with considerable negative economic consequences. In the case of China, these will be global.

The correlation between **income and democracy** is contested, but, according to a significant body of work, democracy becomes very likely beyond certain **income levels**. If that theory holds, the Chinese Communist Party and many countries in the Middle East will soon be in trouble. The democratisation of China (i.e., replacing the current authoritarian model with a political system that provides for greater individual choice and freedoms) will almost inevitably be violent and economically disruptive. Chinese growth rates differ per scenario, although steadily declining in all four as its economy matures and its population ages. It is highest in the Sustainable World, averaging 4% per annum from 2024 to 2043, implying that this scenario would present China with the earliest associated challenge.

**Regional developments could also alter the world in substantive ways**, such as the breakup of the EU or a radical reduction in its membership. The UK has already left the EU. At regular intervals, others threatened the same, although Russia's war on Ukraine and the damage that Brexit did to the UK has reduced threats of similar endeavours by others. China's economy is already larger than the EU27 in terms of purchasing power parity and market exchange rates. Given reasonable expectations of Chinese vs EU27 economic growth rates, this gap will increase in future, although the West remains significantly larger as a single group than others. The EU further serves as an essential advocate of a rules-based international order on matters ranging from consumer protection to human rights. A breakup of the EU will have significant adverse effects globally. On the contrary, substantial enlargement with the UK rejoining the EU, including other countries such as Türkiye or a democratic Russia, could unlock positive opportunities.

Should Asians set their differences aside, strengthen their political cooperation and overcome the deep divisions between countries such as Japan, Korea, India and China, Asia would become globally dominant, and a vastly different international order may emerge. However, that is unlikely, given the tensions between China, India and Japan. Historically, two adjacent large powers (China and India) compete rather than cooperate, and relations between these two are tense. More likely, Japan and others will enter closer ties with India as a bulwark against China.

The complex and unpredictable ways that environmental changes are intertwined with development and security illustrate how the biosphere crisis can only be successfully addressed through international cooperation. Europe recently experienced its worst drought in 500 years, much of Pakistan was under water, and portions of Africa are facing long-term distress with massive suffering and loss of life. Beyond Africa's needs, the window for global action to respond to these challenges is closing.

**The accelerated impact of environmental change is undoubtedly the most significant threat to humanity, particularly in poorer regions with less capacity to cope.** Catastrophic climate-change 'tipping points', for example, are nearing — from surging sea levels as polar ice melts to spiking temperatures as methane escapes from permafrost — that would drive an unstoppable cycle of higher global temperatures and more melting. Africa is particularly vulnerable due to its weak adaptive capacity, increased dependence on ecosystems for livelihoods, and rain-fed agriculture. Currently, the



continent is warming faster than the rest of the world, on average, and scientists warn that large portions of Africa may become uninhabitable by mid-century or earlier. Variations in rainfall are significant, and extreme weather events are becoming more regular. Globally, the accelerated impact of climate change is the most likely driver that could unlock the current geo-political impasse towards a Sustainable World. We examine these trends in a separate [Climate theme](#).

Technological innovation is a structural driver of change, but the advent of generative **artificial intelligence** and its potential unintended consequences could become a wildcard. Particularly in the Divided World, World at War, and Growth World scenarios, aggressive state or private sector competition could lead to a race to the bottom, with the rapid development of autonomous killer systems and a lack of regulation and control. Even in the Sustainable World, the extent to which a comprehensive regulatory regime could be pursued is debatable, given the technology's rapid evolution.

The challenge is twofold. On the one hand, rather than creating jobs and opportunities for the majority of the population in poor and middle-income countries, the current path of AI is raising the demand for capital, for highly skilled production workers, and even higher-skilled services, such as management-consulting and technology companies.

On the other hand, digital tools are used for massive data collection and processing - potent assets in both autocratic governments and private companies alike that are interested in surveillance and the dependence upon big data for social control and their business model, respectively. The power of generative Artificial Intelligence in today's connected yet dividing world is such that the World Economic Forum's [Global Risks Report 2024](#) identifies **misinformation and disinformation** as the number one global risk, given the number of elections that will occur.

It is important to underline how much a more crowded, interdependent world is changing interstate relations. The split between an apparent self-centred West and the Global South gained substantive impetus when, at the height of the devastating COVID-19 pandemic, European vaccine manufacturers blocked efforts to relax patent rights whilst simultaneously hoarding available vaccines for domestic use. In this changing world, Western countries underestimate how deeply intertwined their future is with the Global South regarding stability, growth, and environmental change. The divide was illustrated by the Global South's ambivalence in a forum such as the UN General Assembly on Russia's invasion of Ukraine, the decision in September 2023 to expand the original group of Brazil, Russia, India, China and South Africa (BRICS) to include six additional countries with more to follow and the very different responses to events in Gaza when comparing that in the West with reactions from the Global South.

## Conclusion: For Africa — politics for development

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

Our analysis started by presenting the recent history and likely forecasts of the global distribution of material power and influence, focusing on China and the US. In line with the more detailed research done by our colleagues at the [Frederick S Pardee Institute for International Futures](#) at the University of Denver, we find that a power transition that would see **China overtake the US as the most powerful country in the world will likely occur before mid-century**. However, a larger group of rich countries that share a commitment to individual (as opposed to collective) aspirations (democracy, individual human rights, etc.), aka the West, will continue to dominate globally and maintain a technological, wealth and power advantage even over a global axis led by Chinese and Russian concepts for subsequent decades. These divisions are, however, set to become less stark and decline in importance with the emergence of regionalism. From that perspective, what happens within the West, between the US and the EU, is therefore very important.

The emergence of China as the most powerful country globally will inevitably reshape global relations. However, it will occur in a more crowded and complex world where the ability to exercise power is constrained. Given the combined material power of the West and China's relative international isolation (it inspires fear rather than attraction and has tense relations in its neighbourhood), this trend will eventually deliver a global order that will evolve quite differently from the so-called liberal international order even as Asia partly 'decouples' from the rest of the world. At the same time, there are many examples of Chinese integration with the existing rules and norms, such as the extent to which its actions on debt relief for Africa today are to collaborate with international financial institutions rather than operate outside them and the steady adoption of best project standards in expanded infrastructure in Africa and elsewhere. In that future, Africa will geographically straddle a Western-dominated Atlantic to its north and west and an Indian and Pacific Ocean zone eastward, with China at its core but contested areas of influence emanating from India and others.

Several developments could disrupt this broad structural trend, namely, great power implosion in China (most likely as a result of internal pressures towards democracy) or the US (as internal political divisions widen), or the contraction or the expansion of the EU (through, for example, readmission of the UK, the inclusion of Türkiye and a democratic Russia). Deeper regional integration in Asia, the accelerated impact of climate change, the relations between the US and the EU, and India's foreign policy orientations will likely determine the nature of the subsequent global order. Leadership and leaders matter. Because of the influence of individual leaders such as Xi Jinping, Vladimir Putin and Donald Trump in shaping their countries' domestic and foreign policies, what happens to them individually could have global ramifications.

Debates on **power and influence**, such as that set out above, focus on so-called 'great powers' or the 'states that make the most difference,' which does not include any African country. That is typical and occurs despite the large populations of a country such as **Nigeria**, which, by 2043, would have 375 million people, making it the third most populous country globally. In the Sustainable World, Nigeria would have only 42 million extremely poor people - 11% of its population. Historically, a combination of population growth, slow employment growth and relative deprivation translate into more rapid outward migration, and it will be no different this time. **Migration from Africa is set to increase, and it will have significant economic and political effects, particularly in Europe.** Africans will bring their enormous enterprising, creative and connectivity assets, which are already evident in the world of music, the arts, film and literature, as well as in the realm of sport. Therefore, the first effects will likely be cultural, then economic, and ultimately also political. The Old World is ageing, and its demand for lower-skilled labour, which Africa has a large surplus, is increasing. If job opportunities exist, labour will follow, and it will be hard to stop.

Even as no African country emerges as a significant global power, the distribution of power in the 21st century does make the bed in which African states sleep. The issue for Africa is whether that bed facilitates more rapid development. For developed countries, the question is whether global stability is possible given the significant wealth, income, health and education disparities between Africa and neighbouring regions such as Europe, the Middle East and Asia.

Against this background, Africa's leaders must be cognisant of the limited space for the continent's development and the uphill battle to realise a Sustainable World scenario. **Africa needs geopolitical stability that allows for economic growth and human development.** For example, rather than the all-consuming preoccupation by the West with the war in Ukraine, Africans were seized with the second-order economic effect of the war and the impact it had on driving up global food and fuel prices. African responses to the war reflect a widening divide between the West and the Global South, recently accelerated by events in Gaza.

It is for these reasons that Africa's foreign policy and development efforts generally pursue the policies and approaches that would advance the Sustainable 'best of world' objective through greater convergence and more robust, more effective continental institutions, which support and sustain Africa's aspirations and values as enshrined in Agenda 2063. There is considerable scope in this regard by, for example, upgrading the African Governance Platform into a binding legal protocol similar to that of the Peace and Security Council (PSC) and then holding leaders to account, rationalising the plethora of AU-related institutions that litter the continent but provide little or no added value (such as a toothless Pan-African

Parliament), strengthening the relationship between the PSC and the A3 - the acronym for the three African countries that serve on the UN Security Council, etc. Then there are a host of practical measures, such as a lack of progress in implementing the Yamoussoukro Decision on open skies to deregulate air services entirely within the domestic domain of African governments that had made limited progress since 1999, when it was adopted. Most important is the movement towards ever larger integrated free trade regions in Africa that have the most significant development potential for Africa over long-term horizons. Given the political will, African leaders can implement many practical measures to reduce non-tariff constraints on cross-border trade.

**The priority for African leadership is to focus laser-like on every obstacle to maximise its sustainable development prospects.** That includes a next-generation rules-based global system that will facilitate poverty reduction, economic growth, stability and investment in the Global South. Africa needs to awaken to the importance of advocating for a reformed rules-based system that serves its development interests. It needs to present specific proposals in this regard or at least take a more activist role.

Largely a Western creation, in its current form, the rules-based order constrained armed conflict between major powers during the Cold War era. However, that containment resulted in several proxy wars in Africa and elsewhere. It has not facilitated Africa's development since it is primarily premised on maintaining a global structure that skews developmental advantages to the already rich. It allowed the developed world to spew such amounts of carbon into the atmosphere that it now constrains a similar development pathway for others, even as China is now the most significant global emitter of greenhouse gases by a large margin. For all the progress that globalisation has unlocked, such as through trade and knowledge transfers, the current international system embeds privilege through profit shifting and a global tax regime that does not enforce tax obligations where profits are generated. A world with five permanent seats and a veto within the UN Security Council is regularly touted as the most glaring example of the vast global ramifications, even if the declining authority of the Council would make current proposals on [reform](#) more symbolic than substantive.

**AU member states need to focus on the pursuit of a facilitating environment for more rapid growth and poverty alleviation,** even as the commitment to national development by ruling elites is absent in Equatorial Guinea, South Sudan, Eswatini and others in addition to a clutch of Francophone countries that have recently fallen victim to military takeovers. Since the achievement of the Agenda 2063 vision is shared amongst only some African leaders, it is up to critical African states to decide if they are willing to embark upon a two-track approach where some countries commit earlier to higher standards of governance than others. Many attempts have been made to achieve this, such as the Conference on Security, Stability, Development and Cooperation in Africa (CSSDCA), NEPAD and the African Peer Review Mechanism (APRM), pointing to the many hurdles to such a strategy. The differentiated approach in implementing the [African Continental Free Trade Area](#) goes in this direction, but much more is required. Taking this forward will require a different approach to one that seeks to herd every African country towards a common goal with slow reformers setting the pace for the group.

The war in Ukraine and the fear of China's rising influence have significant collateral damage effects, hastening this trend. **The West needs to make a sharp differentiation between China and Russia and resist simplistic narratives that pit a benevolent West against bad China associated with evil Russia in Africa.** While the US and China are both increasingly embracing the idea of a bipolar struggle, Africans need to work for a multipolar world where they are not in the pocket of any great power.

There is, simply put, no strategic profit to be gained by the ongoing demonisation of China in the US and Europe and vice versa. The Chinese Communist Party will not abandon its collectivist views on politics and development as much as democratic countries will not abandon a belief in individual freedoms and political rights. Nor can the West constrain China's momentum towards great power status. What is needed is a determined effort to rebuild relations between the West and China to one of mutual respect and acknowledgement of the differences in approaches to development and governance.

Africa can continue to seek profit from playing the West off against China as it has in the past, which is likely the default position on the current global trajectory towards a Divided World. What ultimately matters is what Africans do in participating and negotiating with Chinese and Western contractors, being similarly uncompromising in legal language, being willing to walk away from deals if they do not serve inclusive development goals and cracking down hard on any labour or environmental abuses by foreign companies.

The time for unreasonable confidentiality clauses and political conditionality is past. Choosing to side with China, Russia, the US, or Europe on matters not directly concerned with Africa or playing the one-off against the other serves no purpose. In the interests of unity, Africa should not commit to foreign policy support on issues where its interests are not directly at stake.

**Developmentally minded African governments should commit to a minimum set of project transparency and implementation requirements** (such as public consultation and environmental standards) that apply across the board for all companies and countries that invest in the participating African countries. The requirements should be clear, simple and public, with all subsequent agreements disclosed, available upon request, and bolstered in a binding legal protocol followed by domestic enactment and implementation.

It is self-evident that coordinated positions among Africa's leading countries on critical matters such as foreign investment, particularly in the mining sector, regarding beneficiation and transparency would maximise the ability to shape the international rules to the advantage of the participating countries. **Strengthening Africa's investment and financing models, with outside support where appropriate, would boost the continent's fortunes.** To facilitate investment into Africa, critical countries with the proper governance institutions and regulatory standards could set themselves up as investment routes to facilitate inward capital flows - a role that Hong Kong played in respect of China for many years.

**Looking to the West, what Africa needs is for Western governments to find ways to de-risk investment by its banks and the private sector in the continent.** Ultimately, low investments are driven by colonial-era hangovers and negative perceptions that have been deeply ingrained in a Western world that has provided a drip-feed of aid to Africa since the 1960s. Europeans and Americans regularly berate Africans for their lack of development in return for this payment, much of which was to buy loyalty during the Cold War, without sufficient recognition that the amounts and modalities are insufficient to change fundamentals such as Africa's poor human capital endowment that could unlock more rapid growth.

Instead, most Africans see aid as a nominal tax paid for past injustices and an international system skewed against the continent's development. Western rating agencies play a significant role in this regard. They have, for decades, adopted a punitive approach to investment in Africa compared to other regions, driven by the private sector's demand for a secure investment and a lack of knowledge of the continent based on the adverse reporting from a sprinkling of Western news reporters located in Nairobi or Cape Town. Changing these perceptions requires **ongoing engagement, communication and much greater visibility of Africa's development efforts in Europe and North America.** It requires massive student exchange programmes, regular trade fairs and political dialogue — not only visits when gas from Russia runs dry or to counter China's growing influence in Africa.

**Much more important for Africa than aid is a reset in the relations between the West and China.** The trajectory towards a Divided World will likely accelerate the continent's ongoing and emergent challenges. It is evident in the extent to which Moscow was able to leverage its limited assets in producing fertiliser, wheat, energy, arms and military cooperation to pursue an anti-Western agenda in Africa to the detriment of stability and development. Africans need to take political and diplomatic action to avoid further collateral damage.

China, Europe and the US are Africa's most important development partners, even as the continent's trade with other countries in the Global South is increasing. Africa desperately needs Chinese loans, investment and domestic

manufacturing contributions, and what the US and the EU can offer under their various initiatives, such as the US's Build Back Better World, the EU's Global Gateway, and the G7's Partnership for Global Infrastructure and Investment. Chinese companies have already built 60% of World Bank projects, and the West does not have the tools to replace that supply although it has many other offerings, including technology, investment standards, data protection standards and expertise in project management. Above all, the West sits atop a dam of potential investment monies that could improve Africa's prospects, given a more reasonable risk and investment framework.

**Beyond Africa's development needs, the accelerated impact of climate change will, almost inevitably, require an entirely different mindset and approach.** Separate themes on [climate change](#) and [energy](#) provide significant additional context and interpretation. Inevitably, those economic transitions with the highest growth content, such as implementing the African Continental Free Trade Agreement, result in the most significant increase in greenhouse gas emissions. Although emissions per capita in Africa are very low, the rapid growth in the continent's population, on top of the expansion of electricity access and greater energy intensity as incomes rise, points to rapid increases. **Africa is not responsible for climate change, but what happens in Africa will determine the global climate future.**

Amongst others, Africa needs to have a severe bout of introspection about **population growth** if it is to grow economically more rapidly, improve the prospects for its young population, and curb greenhouse gas emissions in its own and global interests. The theme on [demographics](#) explains that rapid population growth in Africa is a drag on development, given the low ratio of working-age persons to dependents. Eventually, only much deeper economic and political integration complemented by much more rapid and sustained economic growth in Africa could offset the continent's limited role in shaping global orientations - but that needs to occur sustainably.

**How do global players construct a collaborative rather than competitive global system that will enable humanity to survive and prosper in the long term, particularly in Africa?** The elements are well established. Most recently, they were reiterated in the UN Secretary-General's briefing to the General Assembly on [Priorities for 2023](#). "The world", Antonio Guterres warned, 'is staring down the barrel of a confluence of challenges unlike any others in our lifetime. ... This is not a time for tinkering. It is a time for transformation.' Many elements of an appropriate reform agenda are reflected in the September 2021 report by UN Secretary-General 'Our Common Agenda', but instead of action, Guterres warned, 'the chances of further escalation and bloodshed keep growing.' Amongst a host of priorities for urgent action, he listed an agenda for the radical transformation of the global financial architecture to place the needs of developing countries at the centre of every decision and mechanism of that system.

### Recommendations from Africa

1. We need geopolitical stability. No instrumentalisation of China-US rivalry or Russia-Ukraine war.
2. Relentlessly pursue development interests: invest in agriculture, set conditions for FDI including knowledge transfers, domestic economic linkages, renewables in addition to baseload energy from nuclear and gas
3. Full transparency on all government contracts, loans to state and SOE's. No hidden debt. To combat corruption and illicit financial flows agree to non-reciprocal tax information exchange mechanisms.
4. Strengthen our continental institutions: legally binding protocol on good governance; development of common technical standards, e.g. railways and ICT.
5. Reform of global financial and trade architecture, reduce cost of sovereign borrowing, provide debt relief, democratise decision-making processes, scale development/climate financing from private sources, global tax reform.
6. Accelerate full implementation of AfCFTA and maintain momentum at sub-regional level.
7. Invest in an early transition to sustainable energy including renewables, baseload from nuclear and gas
8. Encourage emerging technologies and innovation: supportive regulatory frameworks for tech advancements.
9. Act collectively: amplify Africa's voice on international trade, climate policies, global governance reforms.
10. Support Africa's creative industries and tech startups for economic diversification and job creation



## Endnotes

1. Consisting of Argentina, Australia, Austria, Belgium, Canada, Denmark, Egypt, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, South Korea, Luxembourg, Morocco, Netherlands, New Zealand, Norway, Poland, Portugal, Romania, Singapore, Spain, Sweden, Ukraine, UK and the US.

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Dr Jakkie Cilliers is the ISS's founder and former executive director. He currently serves as chair of the ISS Board of Trustees, head of the African Futures and Innovation (AFI) programme at the Pretoria office of the Institute, and is an extraordinary professor at the University of Pretoria. His 2017 best-seller *Fate of the Nation* addresses South Africa's futures from political, economic and social perspectives. His three most recent books, *Africa First! Igniting a Growth Revolution* (March 2020), *The Future of Africa: Challenges and Opportunities* (April 2021), and *Africa Tomorrow: Pathways to Prosperity* (June 2022) take a rigorous look at the continent as a whole.

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Scenarios and forecasting can help Africa identify and respond to opportunities and threats. The work of the African Futures & Innovation (AFI) program at the Institute for Security Studies aims to understand and address a widening gap between indices of wellbeing in Africa and elsewhere in the world. The AFI helps stakeholders understand likely future developments. Research findings and their policy implications are widely disseminated, often in collaboration with in-country partners. Forecasting tools inspire debate and provide insights into possible trajectories that inform planning, prioritisation and effective resource allocation. Africa's future depends on today's choices and actions by governments and their non-governmental and international partners. The AFI provides empirical data that informs short- and medium-term decisions with long-term implications. The AFI enhances Africa's capacity to prepare for and respond to future challenges. The program is headed by Dr Jakkie Cilliers.