Africa in the World

Recent History

Jakkie Cilliers, Marvellous Ngundu and Blessing Chipanda

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Recent History

The US and Africa

During the Cold War, Africa's relevance rose as Washington and Moscow competed for influence, but the collapse of the Berlin Wall in 1989 diminished its strategic value. Until then, important states on the continent were courted with money and arms as part of the Cold War competition. 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, facilitated by state weakness, exclusion, local conflict, illicit economies, porous borders and ideological diffusion. 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 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. However, 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, its concerns about stability in the Middle East as well as in key African states such as Angola and Nigeria, and the support that the US had provided to oil-rich autocracies. However, for many subsequent years, the US was the largest provider of humanitarian relief and aid to Africa, particularly in the health sector, while efforts, such as the African Growth and Opportunity Act (AGOA), provided duty-free access to the US market.

Africa largely missed the extraordinary globalisation of US corporate investment since the 1990s: American outward foreign direct investment (FDI) expanded enormously worldwide. Africa captured only a small fraction of that expansion, typically less than 1% of US outward FDI stock. The decline in US interests in Africa is reflected in a steady decline in export value to the continent since 2014, coinciding with growing Chinese influence.

For the US, the long-run trend is best described as growth in the dollar value of US investment in Africa, but stagnation—and, more recently, relative decline—in Africa's importance within the US investment portfolio. There has also been a major change in what Americans invest in: from an overwhelmingly extractive model in the 1990s and 2000s toward a more diversified portfolio.

Over the last decade, US–Africa relations have shifted from a relationship dominated by aid, counterterrorism, health and governance toward one increasingly shaped by trade and investment, strategic infrastructure, critical minerals, technology and geopolitical competition. The change has occurred across three administrations—Obama, Trump I, Biden, and now Trump II—and has not been linear, though with considerable continuity.

At the beginning of the period, the principal pillars of US engagement remained initiatives established earlier: the President's Emergency Plan for AIDS Relief (PEPFAR), Power Africa, the Millennium Challenge Corporation (MCC), and, particularly, the African Growth and Opportunity Act (AGOA).

AGOA remained the centrepiece of US–African trade policy, giving eligible sub-Saharan African countries duty-free access for more than 1 800 products in addition to thousands covered under the Generalized System of Preferences. Congress extended AGOA for ten years in 2015.

The Trump administration introduced an important change in emphasis with Prosper Africa, announced in 2018 and launched in 2019. Instead of establishing another conventional aid programme, it sought to coordinate 16 US government agencies to increase two-way trade and investment.

Another important institutional innovation was the creation in 2019 of the US International Development Finance Corporation (DFC), which replaced OPIC and gave Washington a much stronger development-finance instrument.

The Biden administration's 2022 US Strategy Toward Sub-Saharan Africa emphasised African agency, democracy, economic opportunity, climate adaptation and energy transition, while explicitly recognising Africa's growing importance to global politics, including by hosting the December 2022 US–Africa Leaders Summit in Washington, DC, which was attended by 50 African delegations. The administration announced plans to commit at least US$55 billion to Africa over three years and placed trade, investment, infrastructure, energy, agribusiness and digital connectivity prominently on the agenda.

Prosper Africa survived the change of administration to President Trump and expanded. The objective remained to mobilise American private capital rather than to compete with China through state-financed lending. By 2024, the U.S. government reported that, since January 2021, Prosper Africa had helped close 1 695 deals worth US$63.5 billion across 41 African countries as the US sought to use relatively limited public resources to reduce investment risk and mobilise much larger pools of private capital.

Its weakness is that private companies cannot simply be instructed to invest in Africa.

The Lobito Corridor may ultimately prove the most strategically significant US initiative in Africa of the decade. The project centres on the railway running from the Atlantic port of Lobito in Angola through the DRC copper belt, with a planned extension into Zambia. By late 2024, more than US$3 billion had been committed across interconnected investments in transport, agriculture, clean energy, health and digital access.

In recent years, critical minerals have moved towards the centre of the relationship (also for the EU discussed separately below) given that Africa possesses large shares of minerals essential for electric vehicles, batteries, defence technologies, electronics and renewable-energy systems, particularly in the DRC, which dominates global cobalt production and is a major copper producer and Zambia (copper). Other African countries possess graphite, manganese, lithium, rare earths and platinum-group metals. Washington consequently increasingly views Africa through a supply-chain security lens. In February 2026, for example, the DFC approved additional African investments explicitly linking critical minerals and energy projects to American supply-chain and national-security objectives.

The US has also recognised Africa's rapidly expanding digital economy and its strategic significance. Thus, the Biden administration launched Digital Transformation with Africa (DTA) at the 2022 summit. American companies have obvious comparative advantages in a field in which the US potentially has a stronger proposition than in conventional infrastructure.

Washington has also become more supportive of African economic integration.

The United States increasingly views Africa in the context of competition with China, Russia, and, to a lesser extent, Gulf powers and other emerging states, but has also gradually become more pragmatic, offering an alternative whose clearest manifestation is the Lobito Corridor.

Security remained a major component of US–Africa relations throughout the decade, but the record has become increasingly difficult following coups in Mali, Guinea, Burkina Faso, Niger, Gabon and Sudan during this broader period. The deterioration of relations with Niger was particularly consequential because the United States had developed an important drone and counterterrorism presence there. Following the 2023 coup, American forces eventually withdrew. Russia exploited this dissatisfaction, particularly in Mali, Burkina Faso and Niger.

Democracy and governance has become a source of tension with African governments sometimes regarded American democracy conditionality as inconsistent—particularly where Washington cooperated closely with strategically important authoritarian governments. Since 2025, the emphasis has become more explicitly transactional and linked to U.S. national interests.

Development assistance and traditional aid have become less central to the administration's conception of the relationship, while greater emphasis has been placed on commercial deals, American investment, critical minerals, energy, security and reciprocal economic benefits.

Trump II rejects much of the language of the previous administration, but Lobito, DFC investment, critical minerals and commercially driven engagement fit surprisingly well with the direction in which US–Africa policy was already moving. Washington also confronted an increasingly multipolar Africa in which governments facing American pressure could turn towards China, Russia, Türkiye or Gulf states.

The US Africa Command, AFRICOM, still hosts the most extensive network of recurring multinational exercises across Africa, including its regular African Lion exercise. The 2026 version was hosted by AFRICOM across Morocco, Ghana, Senegal and Tunisia, involving several thousand military and civilian personnel, even as British and French military engagement has declined.

The result has gradually been a more transactional American approach. US interest in Africa has, of course, declined significantly during Donald Trump's presidency, which, amongst others, closed USAID amidst a barrage of disparaging comments about Africans and their leaders.

Europe and Africa

Historically, European relations with Africa were heavily shaped by colonial legacies and subsequently by the Lomé and Cotonou frameworks, development cooperation and aid conditionality. Relations centred on development assistance, trade preferences and European political conditionality. Today, relations between Europe and Africa are being replaced by a more explicitly geopolitical relationship organised around investment, security, migration, energy, critical minerals and competition for influence.

The EU is the most important advocate of a rules-based system and its domestic policies evidence efforts to balance the power of the market, technology and government, reflected in antitrust activities, Internet privacy, membership in international organisations and ongoing (though declining) support for the pursuit of democracy and human rights. Its social-democratic or more egalitarian model of development, particularly that of the Nordic countries, stands in sharp contrast to free-market capitalism in the US and to the emphasis on collective vs individual rights in China.

The 2023 Samoa Agreement, provisionally applied since January 2024, replaced Cotonou as the principal legal framework between the EU and 79 African, Caribbean and Pacific states, including 48 African countries. It broadens cooperation well beyond development assistance to climate change, migration, security, human rights, investment and multilateral cooperation.

At the November 2025 EU–AU Summit in Luanda, marking 25 years of EU–AU relations, the two sides characterised the relationship as a strategic partnership encompassing prosperity, security, governance, migration and cooperation in multilateral institutions. Development assistance is increasingly being combined with investment, most prominently evident when, at the February 2022 EU–AU Summit, Europe announced the Africa–Europe Global Gateway Investment Package, intended to mobilise around €150 billion for Africa. Its priorities include renewable energy, transport infrastructure, digital connectivity, health, education and private-sector development. Consequently, institutions such as the European Investment Bank and European development finance institutions have become more important alongside traditional aid agencies. Trade relations are also gradually moving towards investment, industrialisation and value chains

A revealing example is the 2025 EU–South Africa summit, where the parties explicitly committed themselves to industrialisation and the beneficiation of critical minerals at source, to cooperation with local industries, and to decarbonisation.

Trade agreements are also evolving, and Europe has also become more supportive of the AfCFTA. Long-term European interest is increasingly shifting from simply obtaining preferential access to individual African economies towards participating in African regional value chains and an integrated continental market.

Europe's search for diversified energy supplies has increased the strategic significance of countries such as Algeria, Egypt, Nigeria, Angola, Mozambique, Senegal and Mauritania. Simultaneously, the European Green Deal has increased Europe's longer-term interest in African renewable energy, green hydrogen and electricity interconnections.

Because Europe's energy transition requires cobalt, copper, lithium, graphite, manganese, rare earths and platinum-group metals and since Africa contains substantial reserves of several of these minerals, relationships with countries such as the DRC, Zambia, Namibia, Rwanda and South Africa increasingly have an economic-security dimension. African governments recognise this leverage and increasingly insist that minerals should be processed in Africa rather than simply exported, thus demanding local processing, industrialisation, technology transfer and value addition.

Migration may be the issue where European and African interests diverge most sharply. African migration has become a major domestic political issue, particularly in Mediterranean states. Consequently, EU relations with Morocco, Tunisia, Egypt, Libya, Mauritania and countries in the Sahel and Horn increasingly include migration management. From Europe's perspective this is understandable domestic politics, but from an African perspective it sometimes creates the impression that Europe increasingly sees Africa through a migration-control and security lens.

There is also a fundamental demographic contradiction emerging. Europe is ageing and will require workers; Africa has the world's youngest and fastest-growing labour force. The longer-term relationship will therefore probably have to move from simply preventing migration towards jointly managing legal mobility, skills partnerships and circular migration.

The inclusion of "migration and mobility" as one of four principal areas at the 2025 EU–AU Summit reflects precisely this unresolved tension.

The EU has sometimes struggled to reconcile the different approaches evident amongst its member states, such as France, Germany, Italy, Portugal and Spain, through "Team Europe", combining the Commission, member states, the EIB and European development institutions behind common projects.

In the meantime, Europe's position vis-à-vis Africa has weakened visibly. For many years, France in particular exercised extraordinary military and political influence in Francophone West and Central Africa. French forces intervened repeatedly, most recently through operations Serval and Barkhane in the Sahel. Military coups and political transformations in Mali, Burkina Faso and Niger, accompanied by intense anti-French sentiment, resulted in the withdrawal of French forces and a major reduction in European influence in the central Sahel, which was exploited by Russia—initially by the Wagner Group and subsequently by the Africa Corps. European security policy has therefore gradually moved away from large European counterterrorism deployments towards African-led security arrangements, training, financing, maritime security, peace operations and selective bilateral partnerships.

Despite growing competition, Europe retains significant advantages, including substantial foreign direct investment stocks, leading universities and research partnerships, technological leadership in many sectors, influential financial markets, reserve currencies such as the US dollar and the euro, extensive diplomatic networks and development finance and humanitarian assistance. Many African elites also continue to have strong educational, business and personal links with Europe. However, younger Africans are more transactional in their approach to external partners and express no preference for Western engagement versus that of China.

The response in the West to China's growing influence in Africa, discussed next, has been alarmist, with recent efforts to counter the Belt and Road Initiative in Africa and elsewhere. In 2021, the Biden administration launched Build Back Better World (B3W) and the EU launched 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, with a particular focus on Africa. From a geopolitical perspective, B3W/PGII represents the G7's strategic response to China's growing influence in the Global South, though the enthusiasm has declined markedly during the second US presidency of Donald Trump.

China and Africa

In contrast to the decline in US interest, from the 1990s onwards, China's relationship with Africa underwent significant changes as it grew in economic and political importance, becoming Africa's largest individual-country merchandise trading partner since 2009. A booming China needed oil and metals, and eventually found an outlet for its sizable current account surplus, as well as work for its construction companies that had built its roads, railway lines, and ports, matching Africa's need for investment and infrastructure.

Chinese customs data place China–Africa goods trade at approximately US$348 billion in 2025. The combined trade of the EU's 27 member states is of a similar order, although the comparison depends on whether services are included and on the exchange rate used. The EU also retains a much larger cumulative stock of direct investment in Africa. The US has a much smaller trade relationship with Africa, about one-quarter the size of the EU's or China's, despite longstanding initiatives such as AGOA.

China is also Africa's largest bilateral creditor (though as a group, Western private banks have a larger share), and it is a crucial source of infrastructure construction and investment. Trade and return on investment are now more critical for China, even as it continues to buy favours in Africa, such as building modern parliament buildings with grants in more than a dozen African countries, most recently in Zimbabwe and Cameroon.

Whereas the West provides aid, though amounts have sharply contracted recently, and, through various agencies, concessional loans, Chinese development finance generally takes the form of near-market-rate loans, much of it for infrastructure.

China's hard-nosed practice is quite different from its benevolent 'win-win' rhetoric. Research on publicly available Chinese sovereign loan contracts identifies unusually extensive borrower-confidentiality clauses, lender-controlled revenue accounts and provisions intended to protect repayment priority. These practices can complicate debt transparency and restructuring. The available contract sample, however, is not comprehensive, and some risk-protection mechanisms also appear in commercial and other official lending. More than one newly elected African leader (such as President Hakainde Hichilema of Zambia) has found that the amounts his country owed to China were much higher than initially thought once so-called hidden debt was also counted, while others, such as Zimbabwe, appear to underreport the numbers.

China's role in Africa is expanding beyond trade and loans. In addition to trade and finance, it now encompasses manufacturing and industrial investment, digital infrastructure, renewable energy, health cooperation, vocational training, peacekeeping, military cooperation, media and education, and the expansion of private-sector investment. A widely cited 2017 McKinsey study estimated that Chinese firms operating in Africa then accounted for about 12%—roughly one-eighth—of the continent's industrial production. China's manufacturing footprint has expanded considerably since then, although no comparable continent-wide estimate has been produced since.

Chinese firms, particularly Huawei and ZTE, have also become major suppliers of telecommunications infrastructure across Africa. This gives China an important role in the continent's digital transformation, while also generating debates about vendor dependence, cybersecurity, data governance and local technological capability.

China's military and security engagement on the continent is also growing and becoming a more important component of Beijing's Africa policy, though it remains much more modest than the US's. For example, in July 2024, Tanzania hosted the largest-ever Chinese military deployment to sub-Saharan Africa as part of Exercise Peace Unity 2024, which included troops from neighbouring Mozambique.

India and Africa

India–Africa relations have deepened and broadened considerably over the last decade, but along a trajectory rather different from those of China–Africa and Europe–Africa relations. India's relationship with Africa has unusual historical foundations. It combines Indian Ocean trading connections, the substantial Indian diaspora in eastern and southern Africa, Gandhi's South African experience, anti-colonial solidarity and cooperation through the Non-Aligned Movement.

But the centre of gravity has shifted. Where the older relationship emphasised anti-colonialism, non-alignment and political solidarity, today's relationship is increasingly about trade, investment, energy, pharmaceuticals, infrastructure, technology, skills and strategic cooperation. India has emerged as a significant trade, investment, technology and development partner, while deliberately presenting the relationship as one of South–South cooperation, African agency and mutual development rather than donor–recipient relations.

The scale is now substantial, much of it led by India's private sector. According to India's Ministry of External Affairs, India was Africa's fourth-largest trading partner in FY2024/25, with bilateral trade of about US$82 billion, while cumulative Indian investment in Africa reached approximately US$80 billion between 1996 and 2025. The relationship remains partly an exchange of African commodities for Indian manufactured goods. Major partners are Nigeria, South Africa, Angola, Egypt, Algeria, Kenya, Morocco and Mozambique, with India's first trade agreement signed with Mauritius in 2021.

New Partners

In the last decade, Gulf states such as the United Arab Emirates (UAE), Saudi Arabia, and Türkiye have moved from being secondary external partners in Africa to becoming important “middle powers” shaping investment, logistics, security and diplomacy, particularly in the Horn of Africa. Their rise is one of the more consequential changes in Africa’s external relations because these countries operate differently from the traditional Western powers and China.

The UAE has moved furthest and fastest. Its role is no longer mainly trade and finance through Dubai. Emirati firms and state-linked investors are building a network spanning ports, logistics corridors, mining, agriculture, renewable energy, telecoms and finance, often reinforced by political and security relationships. The Financial Times recently estimated the value of announced UAE projects in Africa at more than US$168 billion since 2017 and described the UAE as arguably the most consequential new external power to expand its African footprint over the past decade, as it increasingly occupies positions along the trade arteries connecting African production to the Gulf, Asia and Europe.

Saudi Arabia is following a somewhat different trajectory. Historically, its African influence rested heavily on religion, development finance and relations with Red Sea and Horn countries. Under its Vision 2030, this has become considerably more commercial and strategic. Riyadh is increasingly interested in agriculture and food security, mining and critical minerals, energy, ports and Red Sea security. Its engagement with Sudan, Ethiopia and Eritrea illustrates the link between securing economic resources and strengthening Saudi geopolitical influence across the Red Sea.

Qatar remains smaller economically but punches above its weight diplomatically. Its comparative advantage has been in mediation, elite political relationships, sovereign investment and aviation rather than in building the extensive commercial-security ecosystem pursued by Abu Dhabi. In several African conflicts and political disputes, Doha has used mediation as an instrument of influence.

Türkiye's rise is equally striking, but its model is different again. Ankara has constructed an unusually broad African presence combining trade, construction, airlines, diplomacy, humanitarian assistance, education and defence. Its diplomatic expansion is remarkable: Türkiye went from only 12 embassies in Africa in 2002 to around 44, while institutionalising relations through Türkiye–Africa summits.

The biggest recent change in Türkiye's role has been the shift from predominantly soft power to hard power. Turkish weapons have become important in several African militaries. Türkiye has supplied or supported forces in countries including Ethiopia, Somalia and several Sahel states. It also maintains Camp TURKSOM in Mogadishu, trains Somali forces and has become deeply involved in Somali security. A 2024 agreement made Türkiye a partner in Somali maritime security for 10 years, alongside its existing role in training troops, operating key infrastructure and supplying drones. Ankara has simultaneously tried to mediate between Somalia and Ethiopia, demonstrating how military involvement is now translating into diplomatic leverage.

African governments are no longer negotiating mainly with Washington, Brussels, Beijing, Paris and London. They can arbitrage among an increasingly diversified set of partners, now including the Gulf states, Türkiye and India. A more multipolar world, implicit in all four global futures scenarios, creates potentially the best external bargaining environment African states have faced in several decades. The reason is straightforward: the US, EU, China, Gulf states, Türkiye, India, Russia and others increasingly have to compete with one another for assets from and relations with Africa, such as critical minerals.

The distinction between commercial and geopolitical engagement is becoming blurred. The UAE, through DP World's investment in ports, illustrates this particularly clearly. A commercial concession can simultaneously provide access to strategic maritime infrastructure, influence over supply chains and leverage over governments. The same is true of investments in critical minerals, telecommunications and agriculture.

These new transactional relations move more quickly and place less weight on governance conditions than traditional Western interactions. Though attractive to African governments facing infrastructure and financing constraints, their engagement also reduces transparency. It creates difficult sovereignty questions where investment relationships overlap with security partnerships or domestic political networks.

The UAE's role in Sudan demonstrates the downside particularly starkly. Abu Dhabi has been accused of supporting the Rapid Support Forces during Sudan's civil war, a claim the UAE rejects, while simultaneously being deeply connected to African gold and commercial networks. This has produced intense debate over whether Gulf economic interests are becoming entangled with conflict and political fragmentation.

For Africa, a new category of external actors has therefore emerged. The UAE, Saudi Arabia and Türkiye are increasingly combining state capital, commercial companies, diplomacy and security instruments into a single foreign-policy strategy. The emerging African external landscape is therefore increasingly a competitive multipolar marketplace, in which the UAE, Saudi Arabia and Türkiye—along with India and others—can sometimes move faster and accept risks that traditional Western investors will not.

African actors today are, therefore, able to shape outcomes less through raw material power or diplomatic numbers alone than through strategic aggregation: combining votes, markets, strategic assets, procurement decisions, security capabilities and access to territory into bargaining leverage. The shift is incomplete and uneven, but it is increasingly visible. The result is that Africa is moving slowly from being primarily a rule-taker and arena of external competition toward becoming, in selected areas, a coalition builder, market gatekeeper and strategic broker.

Taken together, these developments suggest that African agency is changing along three dimensions.

First, there is a shift from bilateral dependence to competitive multi-alignment. Governments increasingly have several external partners to choose from.

Second, there is a shift from resource ownership toward attempted value-chain control. DR Congo cobalt quotas, Zimbabwe's lithium beneficiation policies and tougher mining agreements in several countries all illustrate efforts to turn geological endowment into negotiating power.

Third, there is a shift from 54 separate markets and diplomatic voices toward continental aggregation through the AU, AfCFTA, African G20 participation and coordinated UN diplomacy.

Multipolarity creates options or potential, as measured by using the various indices assessed in this theme. Those options become bargaining power only when African governments can credibly withhold access, choose another partner, coordinate with neighbours or impose conditions on participation. The continent possesses enormous collective leverage—54 UN votes, 1.5 billion consumers, resources, strategic sea lanes, rapidly growing labour forces, peacekeeping capacity and expanding cultural influence. Yet external powers frequently gain the advantage because they can still negotiate on a country-by-country basis.

The central strategic challenge of the next decade is therefore to translate Africa’s collective weight into greater influence: through coordinated diplomacy in forums such as the G20 and A3 (three African countries serving on the UN Security Council), stronger bargaining power over strategic resources and trade, more sustainable financing for African peace operations and the combined market strength promised by the AfCFTA. The scenarios that follow explore how this agency could evolve under different global conditions.

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About the authors

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

Dr Marvellous Ngundu is a Senior Research Consultant at AFI. He holds a Ph.D. in Economics from the University of Johannesburg in South Africa. He is the recipient of the 2024 Megatrends Afrika Research Fellowship at the Kiel Institute for the World Economy (ifw) in Germany, as well as the 2020/2021 fellowship program of the China Africa Research Initiative (CARI) at Johns Hopkins University's School of Advanced International Studies in the United States. His research interests lie in the fields of international, political, and development economics, with a particular emphasis on Africa-China economic relations.

Dr Blessing Chipanda is a Senior Research Consultant in the African Futures and Innovation (AFI) programme at the Institute for Security Studies (ISS), which he joined in January 2023. An economist by training, his research focuses on development economics, international trade, public policy, and econometric modelling. Within the AFI programme, he specialises in long-term forecasting and policy analysis to explore Africa's development trajectories. He has co-authored numerous reports and policy briefs that employ data-driven scenarios to support strategic planning and decision-making on the continent's economic and human development prospects. Before joining the ISS, Blessing served as an assistant lecturer and research assistant in the Department of Economics at the University of Pretoria. He holds a PhD in Economics from the University of Pretoria.

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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.