Africa in the World

Scenario Logic and Modelling

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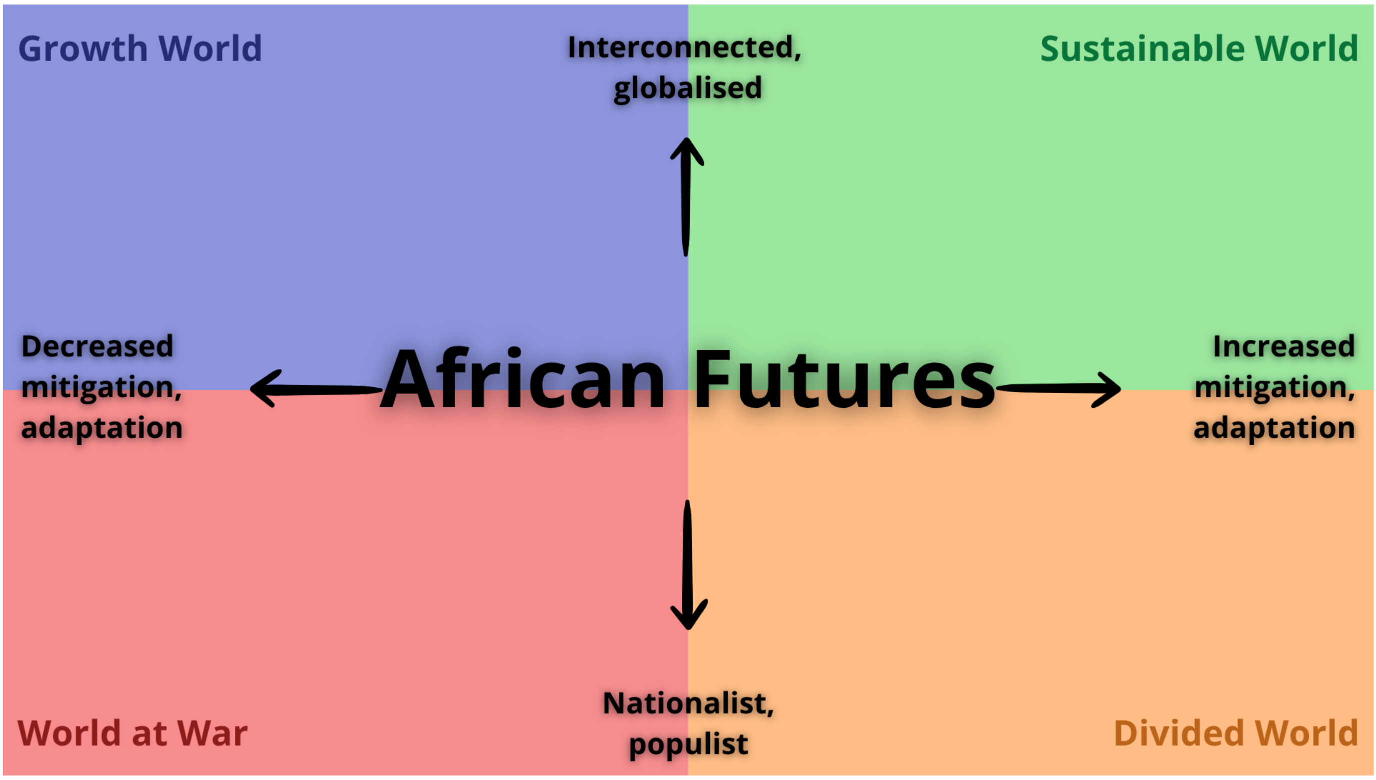
Africa's future development and geo-strategic positioning is subsequently framed within the four global futures scenarios, which are presented in the Global Power Shifts theme. The framing uses two key dimensions that represent fundamental, highly uncertain forces shaping the international system, each with significant implications for development, geopolitics and environmental resilience (Chart 1). The extent of interconnected globalisation (vertical axis) versus nationalist populism captures the degree to which countries and regions remain interconnected through trade, technology and cooperation—or shift towards national priorities. The extent of mitigation (horizontal axis) prioritises equitable growth, environmental stewardship and long-term resource management over decreased mitigation and adaptation.

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

The four subsequent quadrants each represent a possible future based on how these uncertainties might unfold: a Sustainable World; a Growth World; a Divided World; and a World at War. Since they are illustrative, no scenario seeks to present the current real global trajectory, which would inevitably fall somewhere between the four stylised futures. However, it is currently closest to the Divided World scenario.

Chart 1: Scenario framework



The accompanying theme on Global Power Shifts finds that, across measures and scenarios, the very top of the global power hierarchy is relatively stable. Here, the US and China lead an enduring bipolar world order, with India sitting in a third, potential kingmaker spot with enough power potential to tip the balance if it were to side fully with the US or China.

A combined EU has enough power potential to constitute a third pole in a multipolar world order, but this assumes its member countries act in unison. Also, at the country level, a few EU powers remain highly ranked, with France and Germany in the top ten across scenarios and indices. The same applies to the UK. Although Russia's power may stagnate or decline, depending on the scenario, it remains a top-ten global power.

The world order remains effectively bipolar, but with more power dispersed beyond China and the US, which, in the Global Power Shifts theme, was coined the move to a "mini-polar" world.

The defining feature of Africa's external relations is no longer Western predominance; rather, Western predominance is likely to become one component of a broader, more competitive international landscape. The question is whether strategic pluralism, in which African states engage multiple partners simultaneously to maximise economic opportunities, security cooperation and diplomatic flexibility, is a feasible strategy in a world that may force Africa to choose.

In a Sustainable World, governments prioritise sustainability and equity, but the road is long as the positive outcome is built by middle powers that straddle the North-South divide. For Africa, it assumes rapid and ambitious regional integration, progressing from an African continental free trade area, then a customs union and eventually a common market that allows the free movement of capital, labour and services across most countries. In this world, Africa progresses (as outlined in the Combined scenario and in other themes on the AFI website), marked by steady gains in productivity, accountability, democracy and stability. The Sustainable World maximises economic growth, achieving a 2050 African economy of more than US$17 trillion (compared to US$3.4 trillion in 2025), improves income and reduces poverty. However, it is the most difficult to attain given its focus on multilateralism, environmental sustainability and equity.

The Sustainable World produces stronger African growth than even the Growth World scenario because, among other factors, total fertility rates in Africa decline more rapidly, to the extent that the continent enters a potential demographic window of opportunity roughly a decade earlier than in the other three scenarios. Africa also gains from regional integration, better health, more and better education, improved governance, the provision of basic infrastructure and reduced conflict, which outweigh the Growth World's advantages from faster global capital accumulation and corporate expansion. In more developed regions such as Europe and North America, the Growth World scenario generally leads to faster growth and larger economies. In contrast, the African economy is US$3.6 trillion smaller in the Growth World than in the Sustainable World.

A transactional approach to international relations characterises the Growth World scenario. Characteristics include lower taxation, weaker redistribution, deregulation, greater corporate concentration, high trade and capital mobility, limited climate policy and increased corporate concentration with little regard for the environment. This high-growth, more unequal world would see a rise in the power and influence of private capital and of rich countries, which actively support the growth of large firms. This is a future that follows a pragmatic arrangement between the US and China to entrench their respective advantages in technology and military power, and to pursue economic growth in a so-called G2 world.

A Divided World future is characterised by global fracturing, populism, nationalism and a retreat from globalisation—effectively, the fraying of the current rules-based system, with its complex lattice of norms and institutions. National and competitive interests dominate as bickering and beggar-thy-neighbour policies escalate, although there is some trade integration at the sub-regional level. Economic growth is tepid, and poverty reduction is slow. National politics is dominated by xenophobia and anti-migrant sentiments. By 2050, the size of the African economy is US$10.8 trillion, significantly smaller than in the Sustainable or Growth World scenarios.

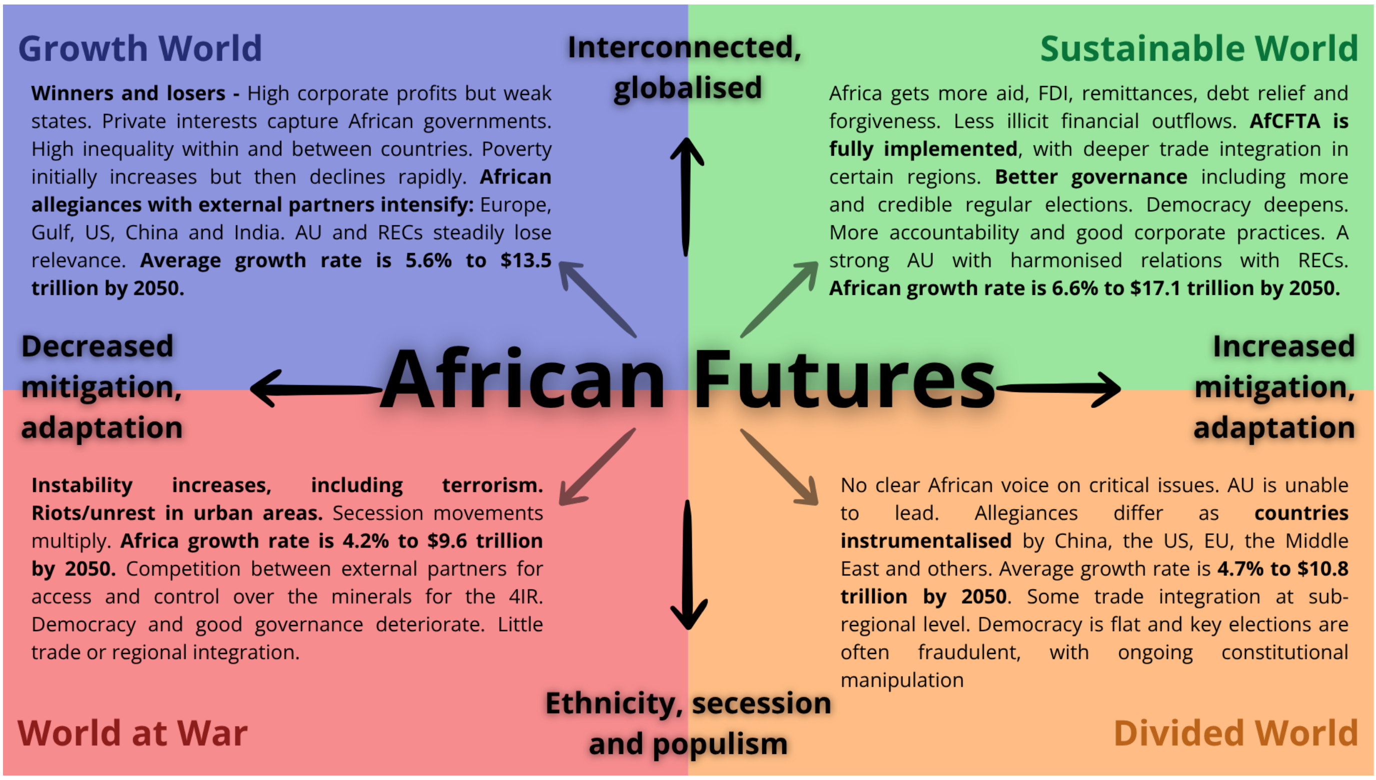
The World at War scenario is one in which competition between the US and China dominates all aspects of the global economy, politics and relations, leading to violent outcomes. Rather than a single war, this is a story of successive conflicts, most likely originating in the Middle East. Shut out of prospects for more rapid development, the absolute number of extremely poor Africans is projected to reach 463 million by 2050, compared to 601 million in 2025. Autocracy spreads, and those African countries that avoid fracturing grow slowly, constrained by their small domestic markets and without the advantages of trade integration. The World at War scenario results in a much smaller African economy of US$9.6 trillion in 2050, which is half the size of the African economy in the Sustainable World.

Although Africa's average military burden remains below the global average in most scenarios, many states lack the fiscal and institutional capacity to provide effective territorial security. The issue is therefore not expenditure alone, but the efficiency, accountability and legitimacy of security institutions. Inevitably, Africa will be more militarised in the Divided World, and especially in the World at War. In the World at War scenario, Africa's military spending rises to 5.5% of GDP—more than triple the 2025 level. In the other scenarios, military spending shrinks to 1.3% of GDP (Growth World) and to 1.2% (Sustainable World), and modestly increases to 1.9% in the Divided World by 2050.

In a World at War, the democratic backslide of recent years, which came later to Africa than in many other regions, worsens, with the continent's 2025 average level of electoral democracy falling to its lowest level since the late Cold War—that is, the period *before* the democracy wave of the 1990s. A Divided World sees somewhat higher levels of participatory electoral democracy, with the present-day backslide persisting, but with Africa returning to its 2016 electoral peak as of 2047. In a Growth World, the democratic backslide reverses much more rapidly, with momentum such that electoral democracy in 2033 is higher than in 2016 and reaches levels higher than at any previous point in its independent history. Even more rapid democratisation is reflected in the Sustainable World scenario.

The key characteristics of the four scenarios in Africa are summarised in Chart 2.

Chart 2: African scenario characteristics associated with each global scenario



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