



Africa in the World

Impact of Scenarios on Africa's Development Prospects

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- Economic size, income and poverty
- GDP per capita
- Basic infrastructure
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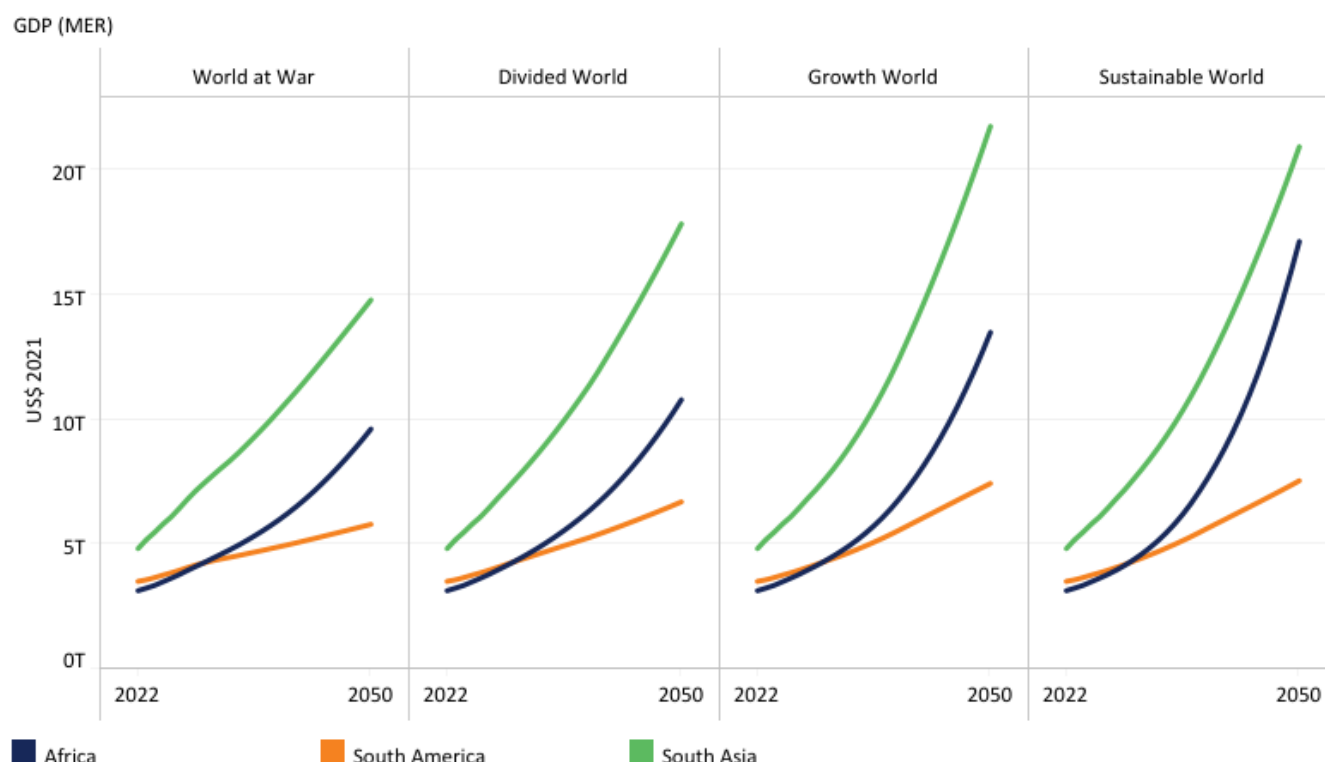
Economic size, income and poverty

Largely because of its rapidly growing population, the African economy grows faster than comparable regions such as South Asia and South America across all scenarios.

Chart 3 compares Africa's outcomes across the four scenarios using economic size (GDP at market exchange rates, MER), GDP per capita at purchasing power parity (PPP), and extreme poverty at the US\$3.00 threshold. The scenario forecasts run to 2050. The comparison highlights a central result that Africa's strongest development outcome occurs in the Sustainable World.

Africa grows most rapidly in the Sustainable World because deeper regional integration is combined with greater improvements in human capital, governance, infrastructure and stability. The scenario assumes an ambitious implementation of the AfCFTA, followed by deeper customs and market integration. These gains outweigh the Growth World's advantages from faster global capital accumulation. This mechanism is consistent with external evidence on the potential integration dividend. For example, [World Bank modelling](#) finds that full AfCFTA implementation could raise Africa's income by about 7% by 2035 and lift millions of people out of extreme poverty.

Chart 3: Africa, South America and South Asia compared: 2022 to 2050 using GDP (MER), GDP per capita (in PPP) and rates of extreme poverty (US\$3 per person) in 4 global scenarios



Source: IFs 8.72 initialising from WDI, World Bank Poverty and Inequality Platform and IHME-GBD data

Ranked from largest to smallest, the 10 African countries with the largest economies in 2025 were Nigeria, Egypt, South Africa, Algeria, Morocco, Ethiopia, Kenya, Ghana, Côte d'Ivoire and Angola. By 2050, South Africa, Morocco and Algeria will move down the rankings but remain within the top 10. Angola drops out of the top 10 in all scenarios, as does Algeria, although the latter only drops out of the top 10 in the Sustainable World scenario. In all four scenarios, Ethiopia, Kenya, Ghana and Côte d'Ivoire move up within the top 10. The new entrants to the top 10 by 2050 are the DR Congo and Tanzania, with their burgeoning young populations, mineral wealth and growth potential.

In the process, Africa's economic centre of gravity shifts eastward and toward larger, younger, faster-growing population centres. At the same time, the continent's established middle-income economies would remain important but become relatively less dominant. This is the emergence of a new continental balance in which Africa has several distinct economic poles rather than one or two dominant hubs: Nigeria in West Africa, Egypt in North Africa, South Africa in the south and an increasingly powerful East/Central African axis built around Ethiopia, Kenya, Tanzania and the DR Congo.

The changes would make Africa more economically multipolar internally—and potentially much more capable of collective bargaining externally.

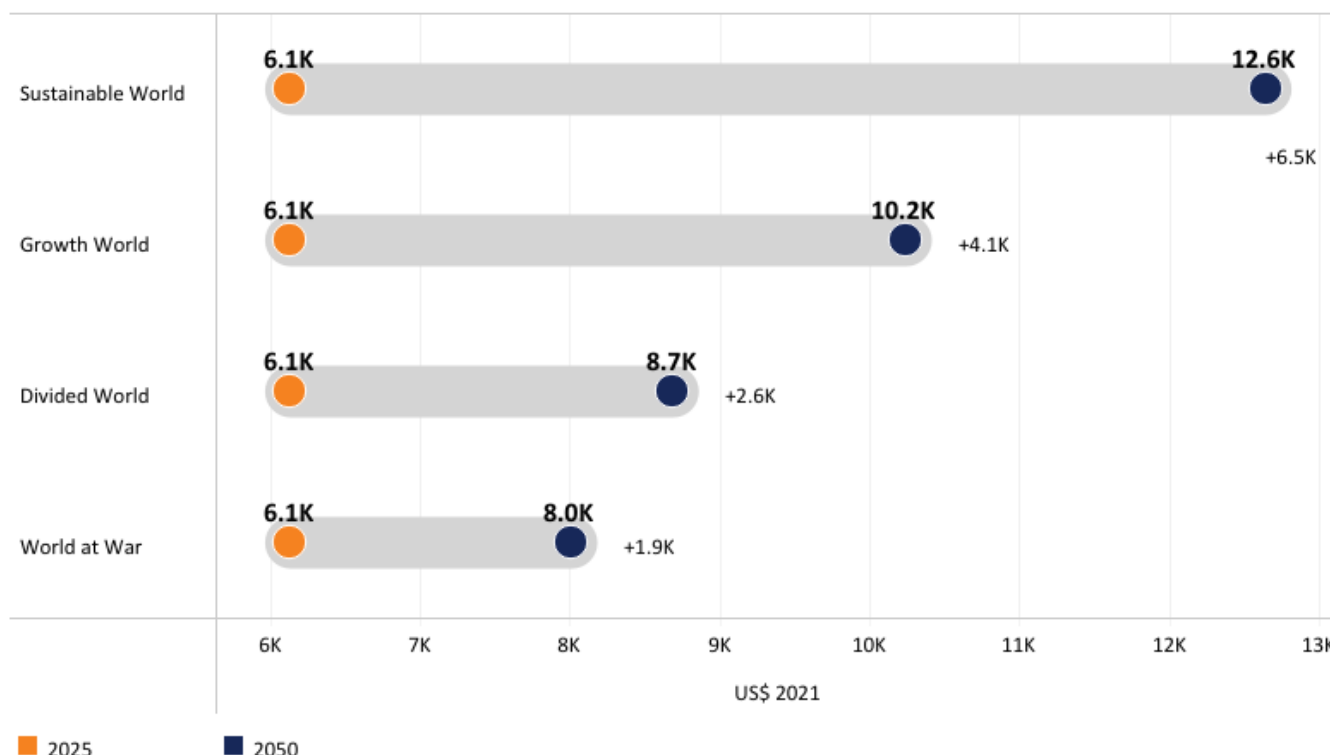
GDP per capita

Chart 4 compares changes in average GDP per capita in PPP terms. In the Sustainable World, the continental average more than doubles from about US\$6 135 in 2025 to US\$12 640 by 2050. In today's cross-country income distribution, this

equates to moving the continental average 30 spots up in the global GDP per capita ranking (from approximately the level of Mauritania or the Republic of the Congo to Fiji or Belize). The increase is substantially smaller in the Growth World and even lower in the Divided World and the World at War.

Comparisons with the present-day income levels of individual countries can be useful illustrations. Still, they should not be interpreted as equivalent living standards because GDP per capita does not capture differences in inequality, public services, prices or non-income dimensions of welfare.

Chart 4: GDP (PPP) per capita in thousands across scenarios, 2025 vs 2050

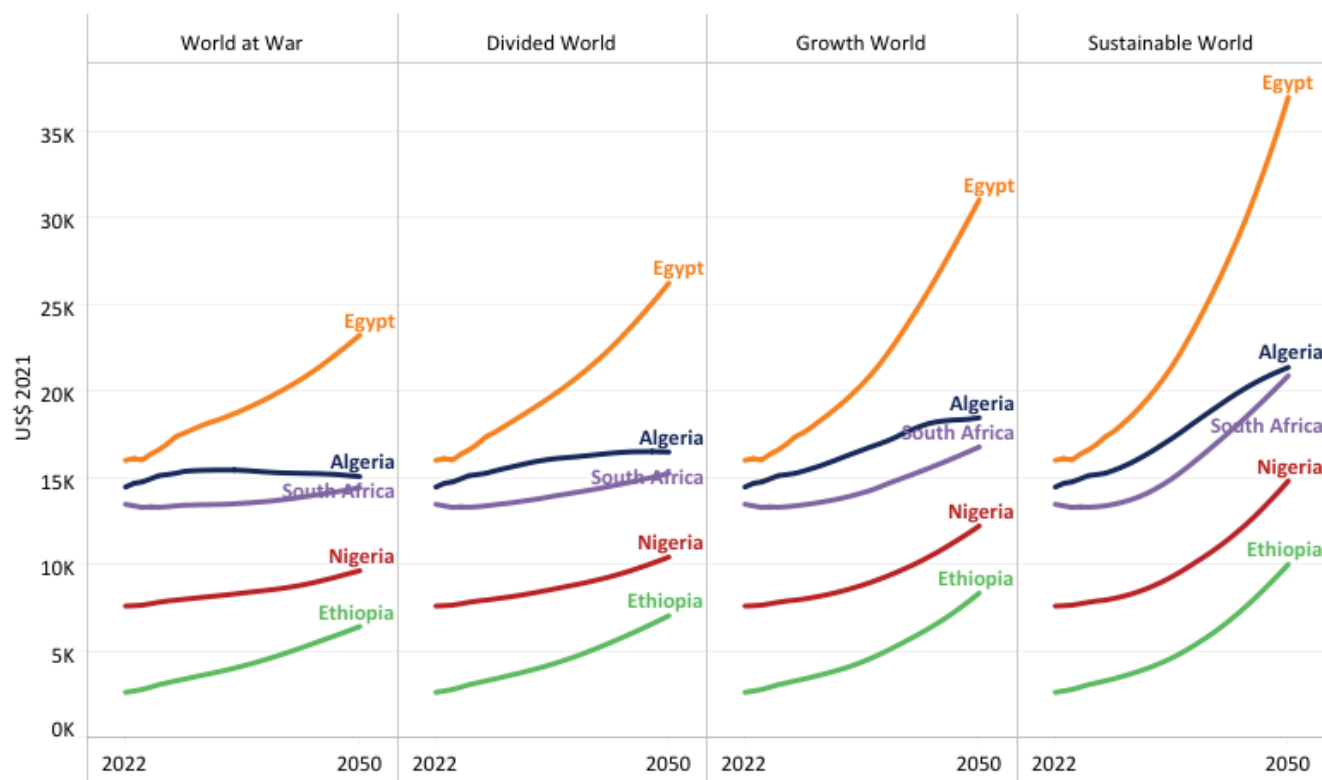


Source: IFs 8.72 initialising from WDI data

Numbers differ per country. Seychelles and Mauritius, Africa's sole two high-income countries, retain their ranking at 1st and 2nd spot in all scenarios using GDP per capita (in PPP), followed, in 2050, by Egypt, which moves up from 5th spot, leaping over Gabon with its declining oil wealth and Botswana with its diamond-backed growth model, which is already running out of steam. Apart from Seychelles and Mauritius, the top 10 in 2050 include Djibouti, Libya, Cabo Verde, Gabon, Botswana, Equatorial Guinea, Ghana, Tunisia and Algeria. South Africa does not feature among the top 10 countries in 2050 in any scenario, such is the impact of poor governance, deindustrialisation and institutional collapse. In 2025, South Africa was ranked 8th. Tunisia, at the 10th spot, retains that ranking only in the Growth World scenario; it is not in the top 10 in any other scenario.

Individual country findings can be visualised in Chart 5, which presents the alternative outcomes for each African country across the four global scenarios.

Chart 5: GDP per capita (PPP) in Africa, 2022-2050 by country and scenario



Source: IFs 8.72 initialising from WDI data

Although their relative positions change, the 10 African countries with the lowest GDP per capita in 2025 were Liberia, Malawi, Madagascar, DR Congo, South Sudan, Mozambique, Somalia, Central African Republic, Eritrea, Burundi and the Sahrawi Arab Democratic Republic . The list does not change by 2050, except that the DR Congo improves more rapidly and exits the group, to be replaced by Sudan.

Coming from a much lower base, Africa's average GDP per capita does not catch up with the averages of other developing regions, such as South America and South Asia, in any scenario, despite making huge strides in poverty reduction. Whereas the number of extremely poor Africans was 601 million in 2025 (39% of the total population), in a best-case Sustainable World, Africa would have only 207 million extremely poor people in 2050, or below 9%. If this were to occur, extreme poverty would cease to be the defining socioeconomic condition of the continent, with a large consumer and middle-income population that would drive internal consumption and urban demand. However, a larger, more economically secure population may become more demanding of state performance. Extreme poverty would be concentrated in a small number of fragile and conflict-affected settings.

The continental averages presented in Charts 4 and 5, therefore, conceal substantial variations, as the scenarios' impacts differ by country. The reasons for these shifts differ. For example, a World at War would affect hydrocarbon exporters, mineral exporters, food-importing states, tourism-dependent islands and conflict-affected Sahelian states differently than the Growth or Sustainable World.

Basic infrastructure

Human development indicators continue to improve across all four scenarios, but the pace differs markedly. In the World at War, average access to safely managed sanitation rises only slowly from the 2025 starting point, while gains are larger in the Sustainable and Growth Worlds. Even in the more favourable scenarios, Africa remains well below the global average by 2050. The implication is that aggregate GDP growth alone is insufficient: sustained public investment, effective local institutions and infrastructure delivery are necessary to translate growth into household welfare.

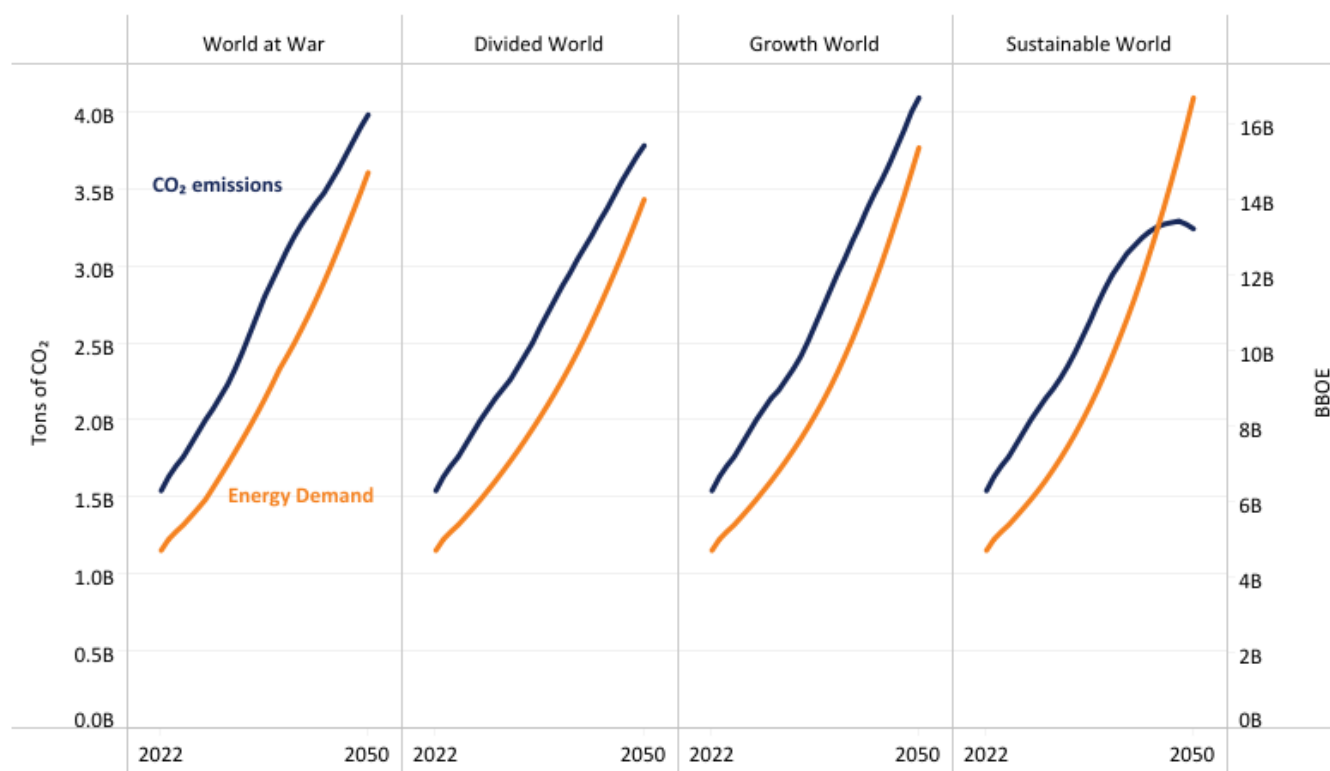
In the World at War, basic infrastructure provisions improves for many households, but not nearly as much as in the other, more optimistic future forecasts. For example, in this uncertain and unstable future, average access to safely managed sanitation in Africa increases from an average of 30% (lowest amongst global regions) by just over 12 percentage points from 2025 to 2050, compared to 20 and 17 percentage point increases in the Sustainable and Growth World scenarios. Even in a Sustainable or Growth World, the gap with 2050 global averages is more than 20 percentage points. While 71% of the global population has access to safely managed sanitation, the corresponding share for Africa in the most optimistic Sustainable World scenario is 50%, illustrating the challenges of catching up. In a Divided World scenario, safely managed access to sanitation in Africa increases to 45% by 2050, compared to an average of 68% worldwide.

Energy and climate

The pathways to the four worlds differ particularly sharply in energy and climate. In the Sustainable World, global fossil-fuel carbon dioxide emissions decline after peaking, whereas they remain substantially higher in the Growth World. The Intergovernmental Panel on Climate Change (IPCC) stresses that climate risks increasingly compound and cascade across sectors, including food, water, health, infrastructure and economic activity. Africa is especially exposed because climate hazards interact with rapid urbanisation, infrastructure deficits, poverty and high dependence on climate-sensitive livelihoods.

Chart 6 presents carbon dioxide (CO₂) emissions from fossil fuels for Africa. We examine these trends in a separate [Climate theme](#).

Chart 6: Africa: Carbon Dioxide Emissions from Fossil fuels and Energy Demand in BBOE, 2022-2050



Source: IFs 8.72 initialising from Appalachian State University and WDI data

In the theme on [Energy](#), we draw on the work of Vaclav Smil and the Human Development Index (HDI), which posits that high human development outcomes are rarely achieved below approximately 8.62 barrels of oil equivalent (BOE) of energy use per person per annum, although energy efficiency and the composition of energy supply matter substantially. Africa suffers from acute energy poverty, as reflected in an average energy demand per capita of 3.5 BOE per person per year in 2025. In only six African countries does demand exceed the 8.62 BOE threshold, meaning most African countries need large amounts of energy for development. The [IEA](#) estimates that around 600 million Africans still lack access to electricity, underscoring the scale of the investment challenge.

Inevitably, rapid development will be accompanied by even more rapid increases in energy demand. Thus, Africa's demand for fossil fuels and carbon emissions is projected to grow across all scenarios, given the continent's rapidly growing population and the need for energy to fuel its development, much of which will still come from coal, oil and gas.

Energy demand in 2025 for Africa was equivalent to 5.4 billion BOE, and the continent accounted for less than 5% of the world's CO₂ emissions from fossil fuel use. Because Africa grows most rapidly in the Sustainable World, its energy demand increases most rapidly in this scenario. By 2050, it will have increased threefold to 3.1 billion BOE. However, because of a more rapid transition to renewables in this scenario, its 2050 carbon dioxide emissions from fossil fuel use are actually the lowest amongst the four scenarios. Important to note that the Sustainable World includes a provision for a global carbon tax, under which richer countries pay more per ton of carbon emitted than poorer countries, thereby assisting the transition to more renewables. As a result, Africa's emissions from fossil fuel use increase more slowly than in the rapid growth of the Sustainable World would otherwise be expected.

If additional energy demand is met mainly through fossil fuels, Africa's carbon emissions will rise. In 2025, the continent accounted for less than 5% of global fossil-fuel CO₂ emissions. In the Sustainable World, its share will remain below 11% by 2050 even as energy use and incomes rise, reflecting faster deployment of lower-carbon energy and a global carbon price that helps finance the transition. This creates a dual policy challenge: expand energy access rapidly while avoiding long-lived, high-cost carbon lock-in.

Security and military expenditure

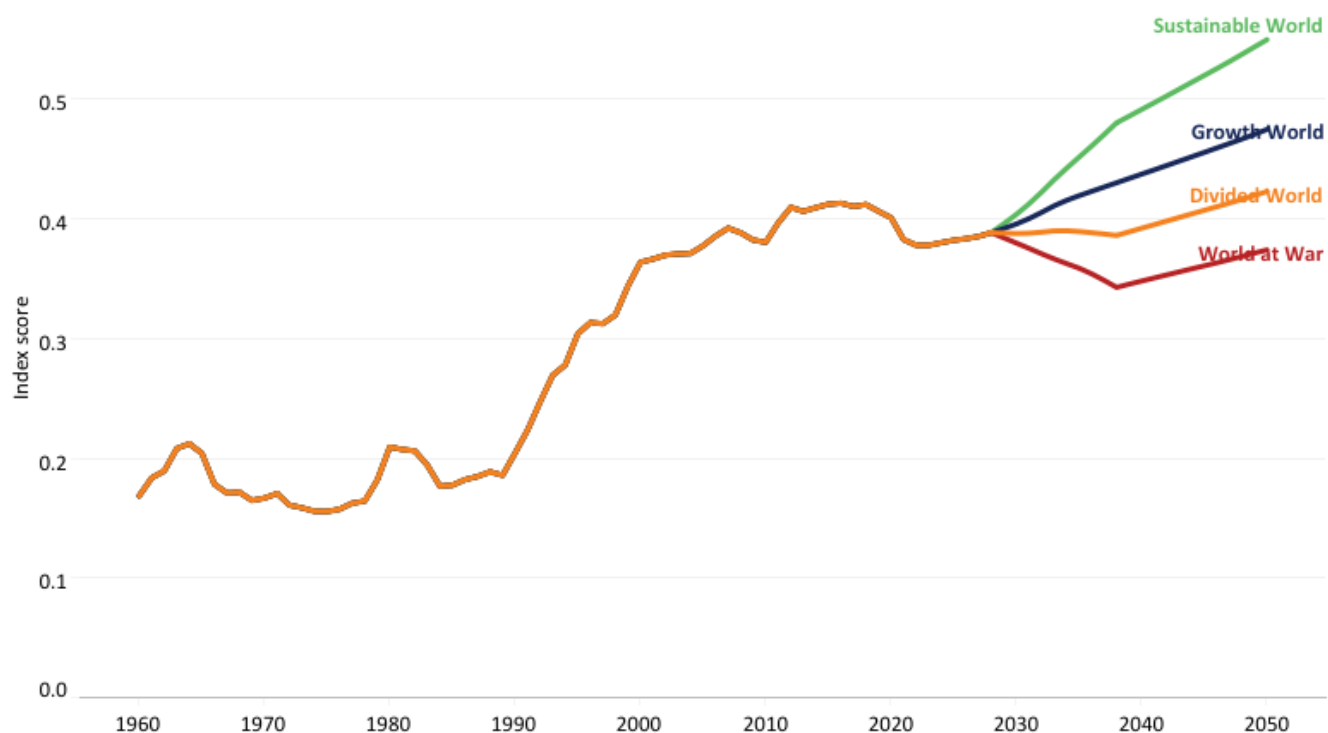
Africa becomes more militarised in the Divided World and especially in the World at War. Military spending will rise from 1.6% of GDP in 2025 to 1.9% in the Divided World and 5.5% in the World at War by 2050, while the share declines in the Growth and Sustainable Worlds. Military expenditure alone, however, is not a sufficient measure of security capacity. Outcomes also depend on professionalism, civilian oversight, legitimacy, intelligence, regional cooperation and the ability of states to provide security and justice efficiently.

Governance and democracy

Governance outcomes also diverge. In the World at War, the recent democratic backslide deepens, and the continental average of electoral democracy falls towards levels last seen before the democratisation wave of the 1990s. The Divided World produces a prolonged period of stagnation before partial recovery. The Growth World reverses the decline more quickly, while the Sustainable World delivers the strongest democratisation.

Chart 7 presents the average history of electoral democracy (or polyarchy) for Africa, using data from the Varieties of Democracy project (V-dem), with a forecast showing the scenario interventions.

Chart 7: Polyarchy Index from V-dem: 1960 to 2020s, with scenario interventions to 2050



Source: IFs 8.72 initialising from WDI data

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

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