Africa in the World

Power and Influence Potential

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Power and Influence Potential

Briefly

The theme on Global Power Shifts introduces three composite measures of national power and influence used in the International Futures (IFs) forecasting platform: the Global Power Index (GPI), the Diplomacy, Military, Economy (DiME) Index and the Formal Bilateral Influence Capacity (FBIC) Index.

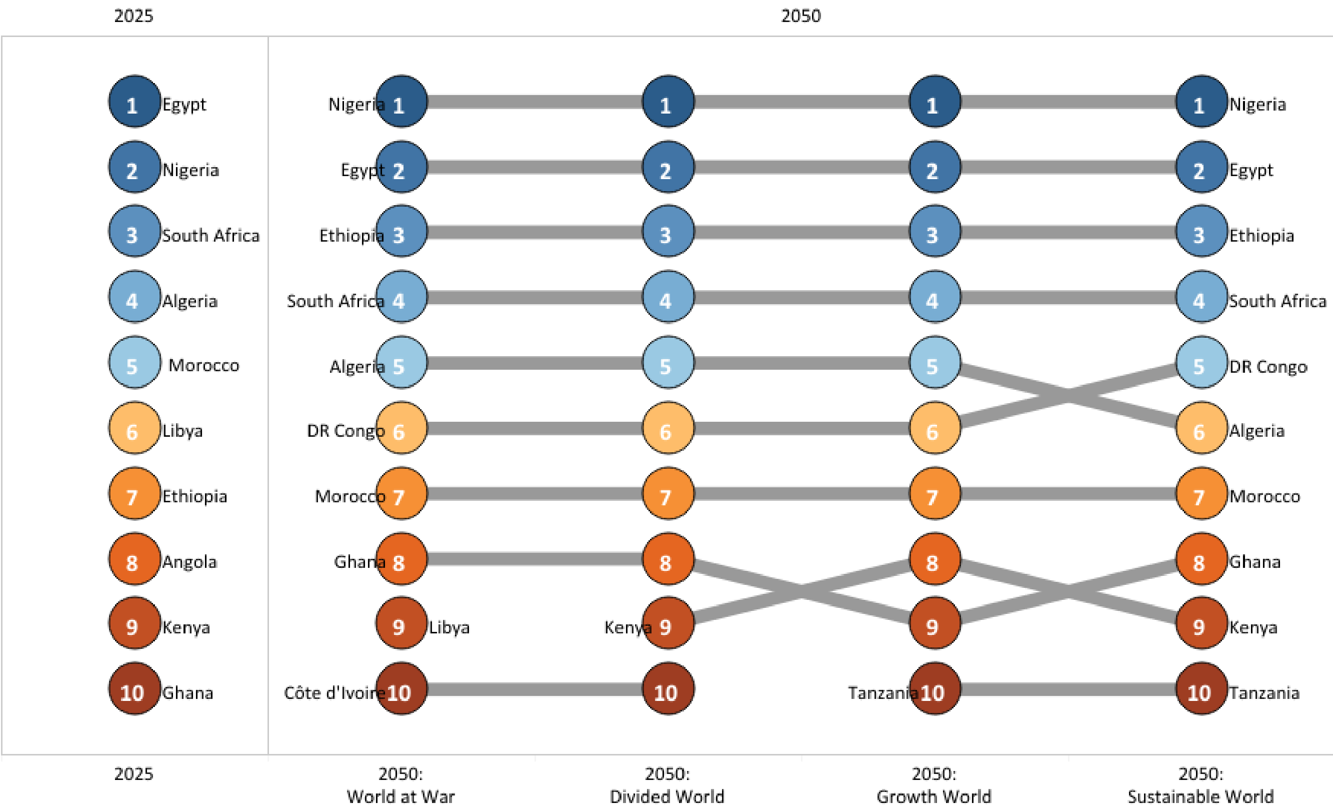
The Global Power Index (GPI)

The Global Power Index (GPI) calculates a state's power potential as a percentage of the global total in any given year. Among the factors included in the calculations are economic size, technological sophistication and population size.

Chart 8 presents the power potential of the top 10 African countries in 2025 and 2050 for each scenario, with Nigeria and Egypt having significantly greater power potential than the others across all scenarios. These top 10 countries account for roughly 58% of Africa's power potential. The power potential of South Africa, Algeria, Morocco, Libya and Angola generally declines, while that of Ethiopia, DR Congo, Tanzania and Côte d'Ivoire increases.

It is also useful to consider how these countries rank globally. In 2025, Egypt ranked 39th out of 188 countries, followed by Nigeria in 40th, South Africa in 48th and Algeria in 50th.

Chart 8: Power potential for top 10 African countries, 2025 and 2050 for each scenario using the Global Power Index



Source: IFs 8.72 Global Power Index

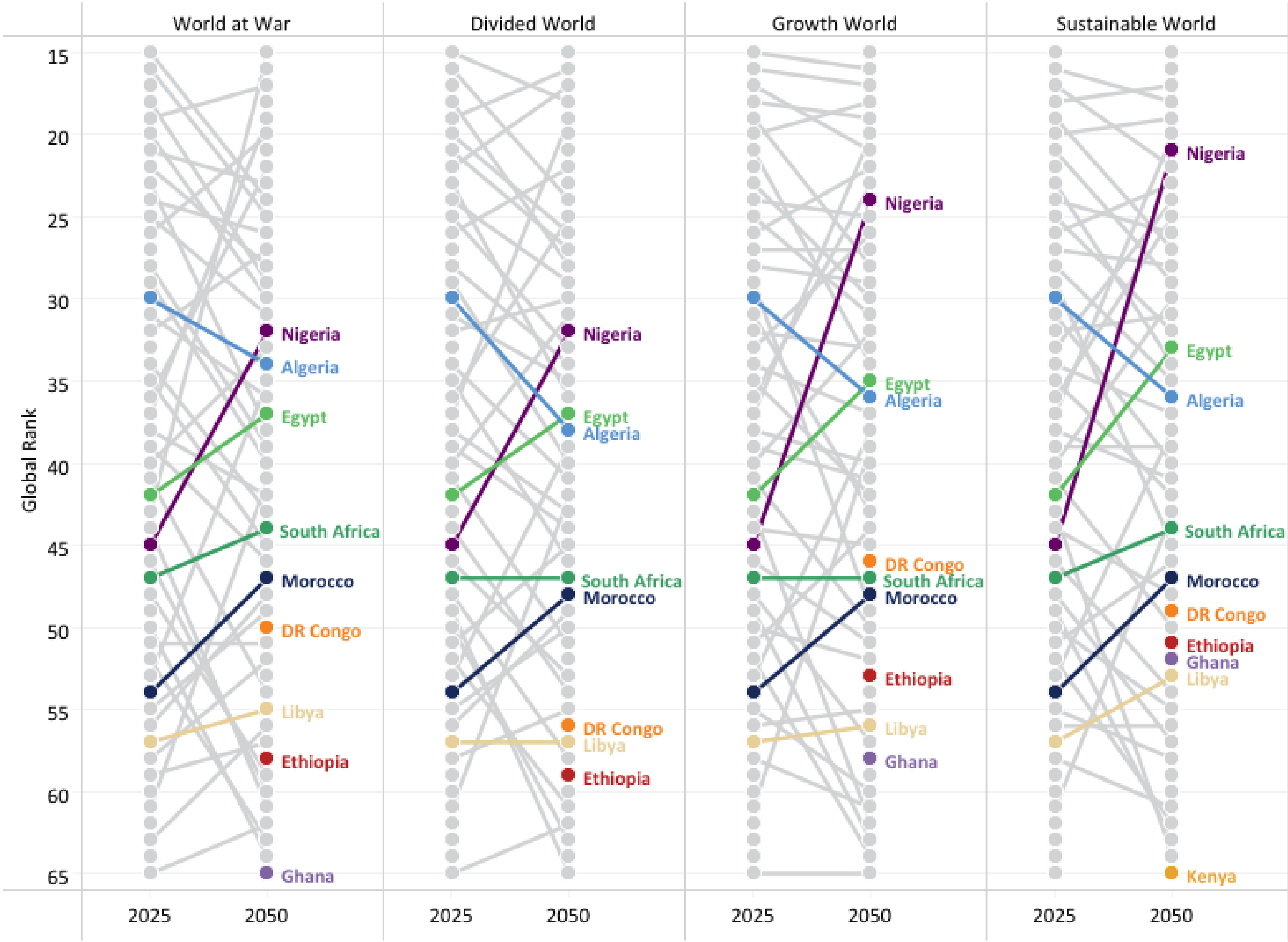
Seen within a global comparative perspective, Nigeria is expected to enter the top 20 most powerful countries by 2050, doing so only in the Sustainable World scenario, with Egypt at 23rd place. Both drop several places in the other 3 scenarios, including in the Growth World. Nigeria's high ranking is largely a function of its large population, which, in all scenarios, surpasses that of the US and makes it the third-largest globally. In 2025, Nigeria, Africa's largest economy, accounted for less than 0.7% of the global economy. It doubles that to 1.4% by 2050 in all scenarios. Within Africa, Nigeria's economy accounts for 20.5% of the continent's total in 2025, followed by Egypt at 14.5% and South Africa at 12.7%. These relative positions shift across the four scenarios, with Ethiopia likely to overtake Algeria (currently the fourth-largest) and even the size of South Africa's economy by mid-century.

The Diplomacy, Military, Economy (DiME) Index

The DiME Index narrows the focus to the specific, practical levers of national statecraft. It groups capabilities into three functional pillars: Diplomatic networks (embassies, treaty participation), Military might (personnel, equipment, nuclear capabilities) and Economic base (market size, financial resources).

The six African countries with the greatest potential for influence using DiME across the forecast horizon are: Egypt, Nigeria, South Africa, Algeria, Morocco and Libya. All climb up the global influence ladder over time. For example, Egypt, the African country with the most influence, moves from the 41st spot in 2025 to the 35th or higher by 2050, but is overtaken by Nigeria, which moves from 44th to 24th position (in the Growth World) or higher. South Africa remains in the third-highest position among African countries across all scenarios by 2050, and its global ranking is unchanged. Nigeria would experience the largest improvement in its ranking, moving from the 44th spot in 2025 to the 24th in the Growth World scenario. However, it does not equally well in the other scenarios, where it remains at the 32nd position.

Chart 9: Top 10 most influential African countries, ranked globally in 2025 and 2050 per scenario using DiME



Source: IFs 8.72 DiME index

The analysis suggests the emergence of a more distinctly multipolar African order, with several regional powers capable of projecting influence beyond their immediate neighbourhoods. The crucial feature is their geography. Five of the six are concentrated at Africa's northern and southern extremities, while Nigeria anchors West Africa. Central and East Africa lack an equivalent heavyweight. Moreover, four of the six—Egypt, Morocco, Algeria and Libya—simultaneously belong to African, Mediterranean and Arab political orientations. Their growing influence, therefore, does not necessarily translate into stronger collective power in Africa. That diversity matters since there is no obvious African hegemon. Even Nigeria, which will increasingly dwarf the others demographically, does not possess South Africa's corporate reach, Egypt's strategic geography, Morocco's commercial diplomacy or Algeria's hydrocarbon and military resources.

The result of the geographic spread could be competitive regional leadership rather than continental dominance and/or encourage the same impetus towards multipolarity also evident globally, with smaller African countries becoming less simply followers of regional hegemons and potentially more capable of multi-alignment among African powers, or sharper competition between the six, already evident between Morocco and Algeria. Their rivalry over Western Sahara and competition for regional leadership and security have already inhibited Maghreb integration, particularly within the Arab

Maghreb Union. If both become more capable internationally without resolving their political differences, the effect could actually intensify competition rather than increase African collective influence.

Egypt and Ethiopia illustrate another problem, even though Ethiopia is outside the top six. In addition to straddling Africa and the Middle East, Egypt's increased influence does not necessarily strengthen Africa collectively if it translates into more intense competition over the Nile and Horn of Africa.

Thus, greater African influence does not automatically mean greater African unity, as it depends on the leading states' use of their growing capabilities to build coalitions or compete for primacy, all of which makes the African Union (AU) more important as a forum for conflict resolution and management. The AU is therefore important internally to constrain and mediate competition among Africa's strongest states and externally to aggregate their capabilities into African negotiating power. Without the second function, external powers can simply cultivate different African powers separately.

For Washington, Beijing, Brussels, Moscow, Ankara and Riyadh, these six most influential African countries are becoming increasingly valuable gateway states. Each offers access to something different.

- Egypt offers access to the Suez, the Red Sea, the Arab world and northeast Africa.
- South Africa offers finance, mining, sophisticated corporations, Southern Africa, G20 and BRICS influence.
- Nigeria offers West Africa, hydrocarbons, cultural reach and eventually an enormous consumer market.
- Morocco offers Europe-Africa connectivity, finance, phosphates and expanding West African commercial networks.
- Algeria offers gas, Mediterranean access, military capability and access to the Sahel.
- Libya—assuming sustained political stabilisation—offers hydrocarbons, capital, Mediterranean access and a bridge into the Sahel.

External powers, therefore, have incentives to compete for relationships with these countries, which increases their bargaining power and their potential to act as brokers between Africa and others, but only if they pursue regional or pan-African rather than national interests. Among the six, Nigeria is potentially different because of sheer demographic scale. Nigeria, therefore, probably has the largest upside and largest execution risk among the six.

With its small population and large hydrocarbon resources, Libya benefits from its strategic Mediterranean location and proximity to Europe and the Sahel.

Eventually, Africa's future global influence may depend less on producing a single great power than on whether several medium powers learn to exercise power collectively.

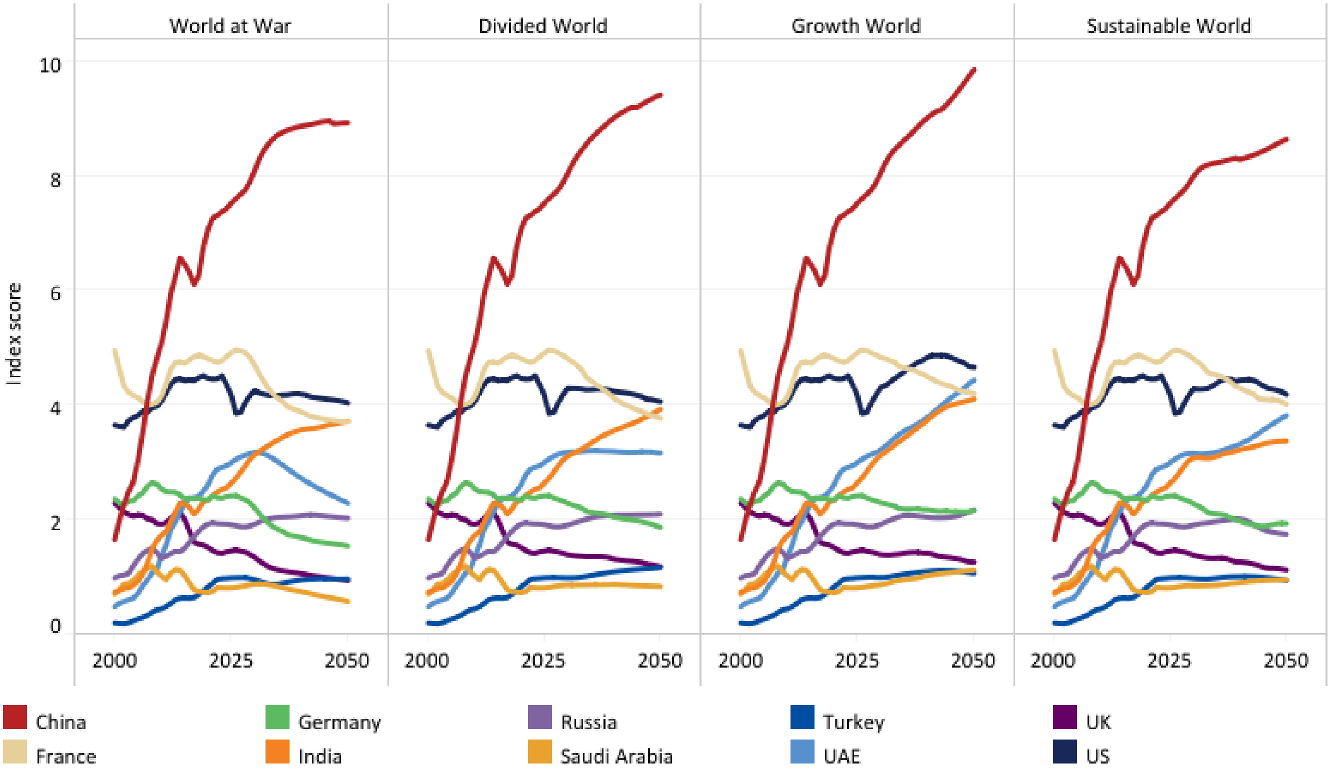
The Formal Bilateral Influence Capacity Index (FBIC)

The FBIC Index in IFs quantifies bilateral relational power, i.e., the capacity for influence, between specific country pairs (dyads). It departs from the premise that interstate influence is driven by two intersecting dynamics: the absolute volume of interactions between two states and the relative dependence of one state on the other. By examining these relational dynamics across economic, political and security dimensions, the FBIC Index evaluates which side of a dyad can most credibly leverage its relationship to compel decisions that a dependent state might not have otherwise made.

According to the FBIC Index, Europe appears extraordinarily influential in Africa, which is perhaps not surprising given its colonial history. Chart 10 presents the FBIC calculation of the history and future influence capacity of the US, China, France, Germany, the UK, India, UAE, Russia and Türkiye on Africa from 1960 to 2050. French (and US) influence capacity in Africa peaked in 1985 and has declined since then, and this trend continues across all scenarios. Using FBIC, France still has more influence capacity in Africa than the US. At the same time, the latter is stagnant but gains the most influence in the Growth World scenario, given the US economy's more rapid growth there.

UK influence capacity peaked earlier, in 1981, and was overtaken by Russia; by 2025, it ranks below the UAE, Russia and Germany, with continued decline across all scenarios except the Growth World. Towards the end of the forecast horizon, Türkiye's influence in Africa is larger than that of the UK.

Chart 10: Influence of external actors on Africa in different scenarios, 2000-2050



Source: IFs 8.72 initialising from bilateral data

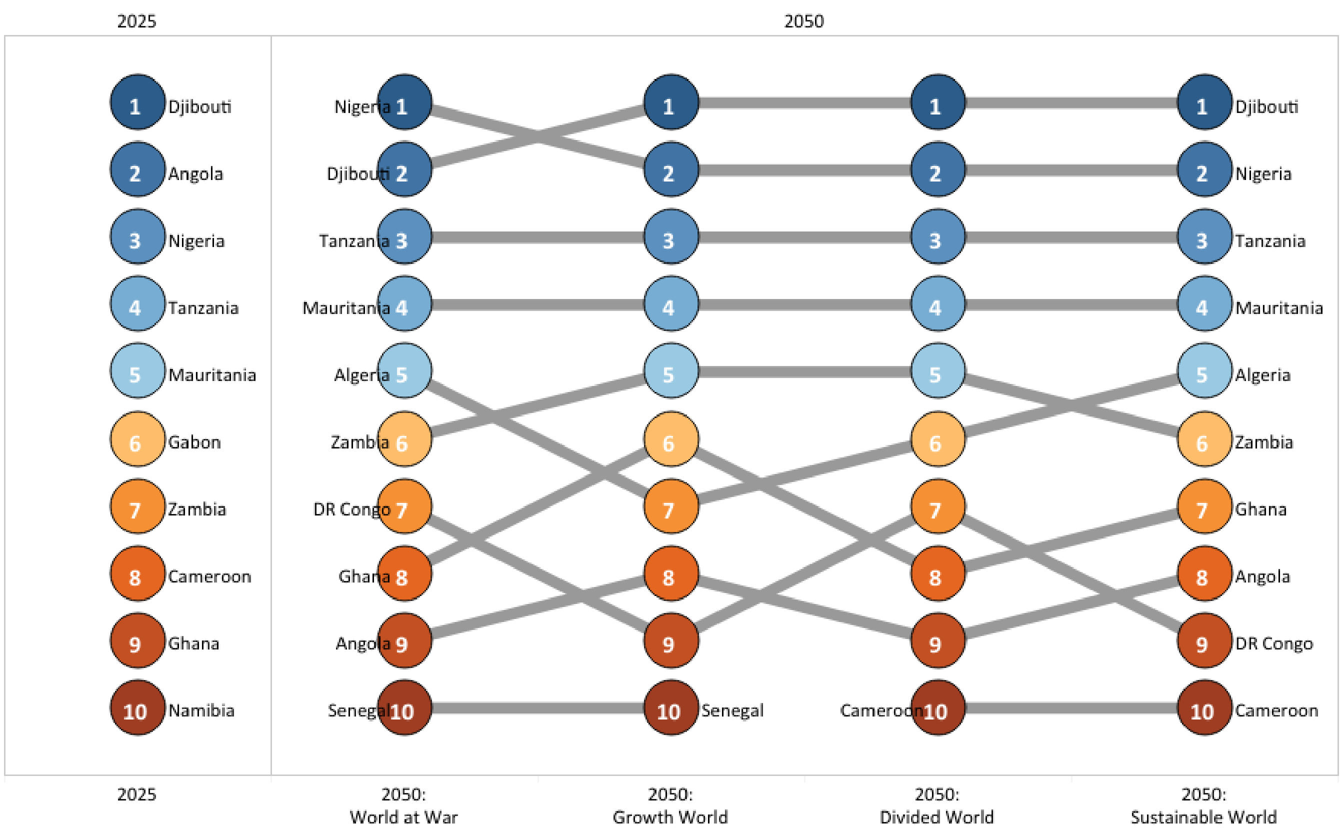
Most revealing is the sharp decline in the influence of France (historically the Western country with the most influence in Africa), as well as the decline of the UK. According to the FBIC, French and US influence in Africa is now at roughly similar levels. Anti-French mobilisation intensified across parts of Francophone Africa during the 2020s. Military governments in Mali, Burkina Faso and Niger incorporated it into their political narratives. At the same time, demands to redefine relations with France also emerged through civil society, opposition movements and democratically elected governments, including Senegal.

Given its growing trade relations with Africa, it is perhaps not surprising that Chinese influence on Africa surpassed that of the US and France in 2007 and, in 2025, is larger than that of any other. Apart from China, India's influence on Africa is expected to steadily increase to 2050, potentially overtaking that of France and the US in some scenarios.

It is evident that the flow of materials from Africa to China, along with Beijing's investments in infrastructure and trade with the continent, is altering Africa's external relationships. As a single country, China will become hugely influential in Africa during our forecast period. Its belief and advocacy of principles such as mutual respect, non-aggression, non-interference, equity and peaceful coexistence is popular in the Global South, meaning that China is likely to steadily close the soft power gap with the US and others. Afrobarometer's continent-wide comparative analysis of attitudes toward China, released in 2021, found that 63% of respondents across 34 African countries viewed China's economic and political influence positively, compared with 14% who viewed it negatively.

Towards the end of the forecast horizon, China has the same level of influence that France had in the 1980s across scenarios. Chart 11 ranks the 10 African countries where China had the most influence in 2025 and forecasts for each scenario in 2050, with the top five spots in that year including Djibouti (where China has its only overseas military base), Nigeria, Tanzania and Mauritania. In the case of the latter, fisheries, minerals, infrastructure and a remarkably durable political relationship with Beijing account for its high ranking. In both Djibouti and Mauritania, China's weight is magnified by the countries' small economies and limited number of alternative large-scale partners.

Chart 11: China's influence on African countries ranked per scenario for top 10, 2025 and 2050



Source: IFs 8.72 initialising from Diplometrics data

Note: High FBIC scores do not necessarily indicate the largest absolute economic relationship. Smaller states may rank highly in interactions with China relative to their overall external relationships, creating a high degree of dependence.

Today, the UAE's trade, investment ambitions, arms transfers and diplomatic engagement in Africa far surpass that of the UK as measured by FBIC. Thus, a Financial Times report shows that, by some estimates, the UAE had become the largest source of capital to Africa by 2026. However, a substantial component is greenfield investment projects representing planned capital expenditure rather than completed investments. Much of it is channelled through the US$240bn International Holding Company (IHC), chaired by Sheikh Tahnoon bin Zayed al-Nahyan, the UAE's national security adviser and brother to its de facto ruler, Sheikh Mohamed bin Zayed al-Nahyan. Dubai has also attracted large inflows from African elites who have shifted their investments to real estate and commercial ventures in Dubai rather than London, Paris or Geneva.

Following a decline in Russian influence for much of the 1990s, Moscow has made a concerted effort to benefit from the waning support for the West in the Sahel by providing security and arms to several military governments in West Africa in the wake of its invasion of Ukraine, as well as seeking to rebuild relations with countries such as Tanzania and South Africa. With limited economic leverage, however, Russia's efforts to build its own influence and undermine Western countries' influence in Africa are constrained. With an economy the size of Brazil's, Russia lags significantly behind great powers such as the US, China, and even Germany. Russia's longer-term influence is constrained by its limited economic weight, the fiscal and military costs of its external engagements, sanctions and uncertainty surrounding its future political and economic trajectory.

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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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