



# DR Congo

## Geographic Futures

Blessing Chipanda

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This page starts with a short analysis of the **Current Path** forecast for the Democratic Republic of the Congo consisting of a short introduction, the current population distribution and structure, climate and topography and an overview of the national development plan (if available). The Current Path initialises from country-level data that is drawn from a range of data providers.

The next section compares progress on the **Current Path** with **eight sectoral scenarios**. The eight sectoral scenarios are Demographics and Health; Agriculture; Education; Manufacturing; the African Continental Free Trade Area (AfCFTA); Large Infrastructure and Leapfrogging; Financial Flows; and Governance. Each scenario is benchmarked to present an ambitious but reasonable aspiration in that sector.

The third section compares the impact of each of the eight sectoral scenarios with one another and with a **Combined Agenda 2063 scenario** (the sum effect of all eight scenarios).

Progress is measured on various dimensions such as economic size (in Market Exchange Rates), Gross Domestic Product Per Capita (in Purchasing Power Parity) (GDPPC), extreme poverty, carbon emissions, the changes in the structure of the economy, and selected sectoral dimensions such as progress with mean years of education, life expectancy, the Gini coefficient or reductions in mortality rates.

A separate annexure lists the project data file adjustments (if any) and the scenario interventions for the DR Congo.

We use 2019 as a standard reference year, given the subsequent disruptive impact of COVID-19 nationally and globally. The forecasts extend to 2043 to coincide with the end of the third ten-year implementation plan of the African Union's Agenda 2063 long-term development vision.

The information is presented graphically and supported by interpretive text.

All US\$ numbers are in 2017 values.



## Summary

### Summary

- The DR Congo is the **largest country** by land area in sub-Saharan Africa, the second-largest in Africa and the 11th largest in the world. The country has the second largest tropical rainforest in the world covering more than 992 000 km. It is well known for its abundant and diverse mineral resources (mining the DR Congo's largest industry), extensive navigable waterways, vast hydroelectric potential and arable land, estimated at 80 million hectares. However, in 2021, the DR Congo ranked only 49th when comparing GDP per capita (US\$903.6 at PPP) in Africa. It is classified as a low-income country. Nearly 70.4% of the population lived in extreme poverty on less than US\$1.90 per day (at 2011 prices) in 2021.
- Current Path
  - The DR Congo has the **fastest-growing population** in Africa and globally, with an annual population increase of 3.3% in 2022. It is the fourth most populated country in Africa and the 15th most in the world.
  - The country's **economy** grew by 6.2% in 2021, driven by increased mining production and high global prices of commodity exports. The DR Congo is heavily dependent on commodity trade, particularly oils, copper, cobalt, tin, tungsten and tantalum.
  - The DR Congo's **GDP per capita** is forecast to increase to US\$1 971.8 in 2043, which is equivalent to 60.2% of low-income African countries' projected average in the same year.
  - In 2021, about 70.4% of the DR Congo's population (equivalent to 66.3 million people) lived in extreme poverty, surviving on less than US\$1.90 a day (at 2011 prices). As a result, approximately one-quarter of people living in **extreme poverty** in low-income countries in Africa in 2021 lived in the DR Congo.
- Scenarios
  - The **eight sectoral scenarios** are each explained in the various themes on the website and the impact on each is compared with the Current Path forecast and a Combined Agenda 2063 scenario.
  - The DR Congo's health sector has been greatly impacted by the country's protracted conflict, as well as by the continued long-standing complex humanitarian crises in the world. In the **Demographics and Health scenario**, the DR Congo will enter a demographic window of opportunity from 2043, six years earlier than the average for low-income countries in Africa.
  - The DR Congo has more agricultural land than any other African country, estimated at 80 million hectares of available arable land. However, only 10% of this is currently being cultivated, and as a result the country has the largest untapped agricultural production. In the **Agriculture scenario**, post-loss production in the DR Congo will increase by 4.1 million metric tons relative to the Current Path forecast of 90.3 million metric tons in 2043.
  - Political instability and conflicts in the 1990s severely affected educational outcomes in the DR Congo. In the **Education scenario**, the mean years of education will increase to 10.1 years—an increase of about 1.5 years relative to the Current Path forecast in 2043.
  - The **Manufacturing scenario** will reduce the share of Congolese people living below the US\$1.90 poverty line from 66.9 million people (in the Current Path forecast) in 2043 to 57.4 million people. This is a 14.1% reduction relative to the Current Path forecast.
  - In the **African Continental Free Trade Area (AfCFTA)** scenario, the DR Congo's trade balance will become positive (a surplus) from 2028, with a trade surplus of US\$3.5 billion, equivalent to 1.1% of GDP in 2043. This contrasts with the Current Path forecast, which projects a trade deficit of about 3.6% of GDP in 2043. The trade surplus will come from the materials sector.
  - The DR Congo has a very low mobile broadband rate relative to the average of its peers. In 2021, the country had about 12.3 subscriptions per 100 people, well below the average of 25.2 subscriptions per 100 people for

low-income African countries. In the **Large Infrastructure and Leapfrogging scenario**, mobile broadband subscriptions in the DR Congo will increase to 121.7 subscriptions per 100 people by 2043.

- The conflicts of the 1990s effectively kept foreign investors away from the DR Congo. In the **Financial Flows scenario**, FDI inflows in 2043 will represent about 6% of GDP compared to 4.8% in the Current Path forecast.
- In 2021, the DR Congo governance effectiveness index was 23.8% below the average for low-income African countries, indicating that the DR Congo generally is more poorly governed than most low-income African countries. In the **Governance scenario**, the gap will reduce to 12.2% relative to the estimated average of its low-income African peers in 2043.

- Scenario comparisons

- The first scenario comparison is **GDP per capita**. In 2021, the DR Congo's GDP per capita was 51.7% (US\$906) lower than the average of Africa's low-income countries. The Combined Agenda 2063 scenario will increase the country's GDP per capita by 49.1% (or US\$967.90) above the Current Path forecast of US\$1 971 in 2043. Among the sectoral interventions, the AfCFTA scenario will have the most significantly positive impact on the GDP per capita, followed by the Manufacturing and Governance scenarios.
- **Extreme poverty** in the DR Congo is very high, with limited responsiveness to growth. In 2021, 66.3 million Congolese people (70.4% of the population) lived below the US\$1.90 poverty line for low-income countries. In the Current Path forecast, that number will decline to 66.9 million (39.8%). In the Combined Agenda 2063 scenario, poverty in the DR Congo will decrease to 28.1% or 28.6 million people. The positive impact of the interventions in the Agriculture, Demographics/Health and Education scenarios on poverty are most significant.
- The **DR Congo's GDP** will grow substantially from US\$50.2 billion (2023) to US\$164.4 billion in 2043 in the Current Path forecast and to US\$277.4 billion in the Combined Agenda 2063 scenario.
- In the Combined Agenda 2063 scenario, the **manufacturing sector** will dominate the DR Congo's economic structure in 2043. The sector will contribute 32.7% to the GDP—a 7.5 percentage increase relative to the Current Path forecast in 2043. The manufacturing sector will be followed by the service sector (29.9% of GDP) and materials sector (21.5% of GDP).
- In 2021, the DR Congo's **informal sector** accounted for approximately 42.6% of GDP. The large informal sector is a significant constraint on economic growth. By 2043, the contribution of the informal sector to the country's GDP will decline to 34.5% on the Current Path and to 25.6% in the Combined Agenda 2063 scenario.
- **Life expectancy** at birth for the average Congolese person in 2021 was 62.6 years, with females having 2.4 years higher life expectancy than males. In the Current Path forecast, the average life expectancy in the DR Congo will increase to 67.6 years in 2043, with female life expectancy 2.9 years higher than that of males. The DR Congo's lower life expectancy is attributed to a relatively high disease burden of both communicable and non-communicable diseases, as well as high levels of stunting. Life expectancy in the DR Congo will increase to 69.2 years in the Combined Agenda 2063 scenario by 2043.

## Introduction

Chart 1: Political map of DR Congo

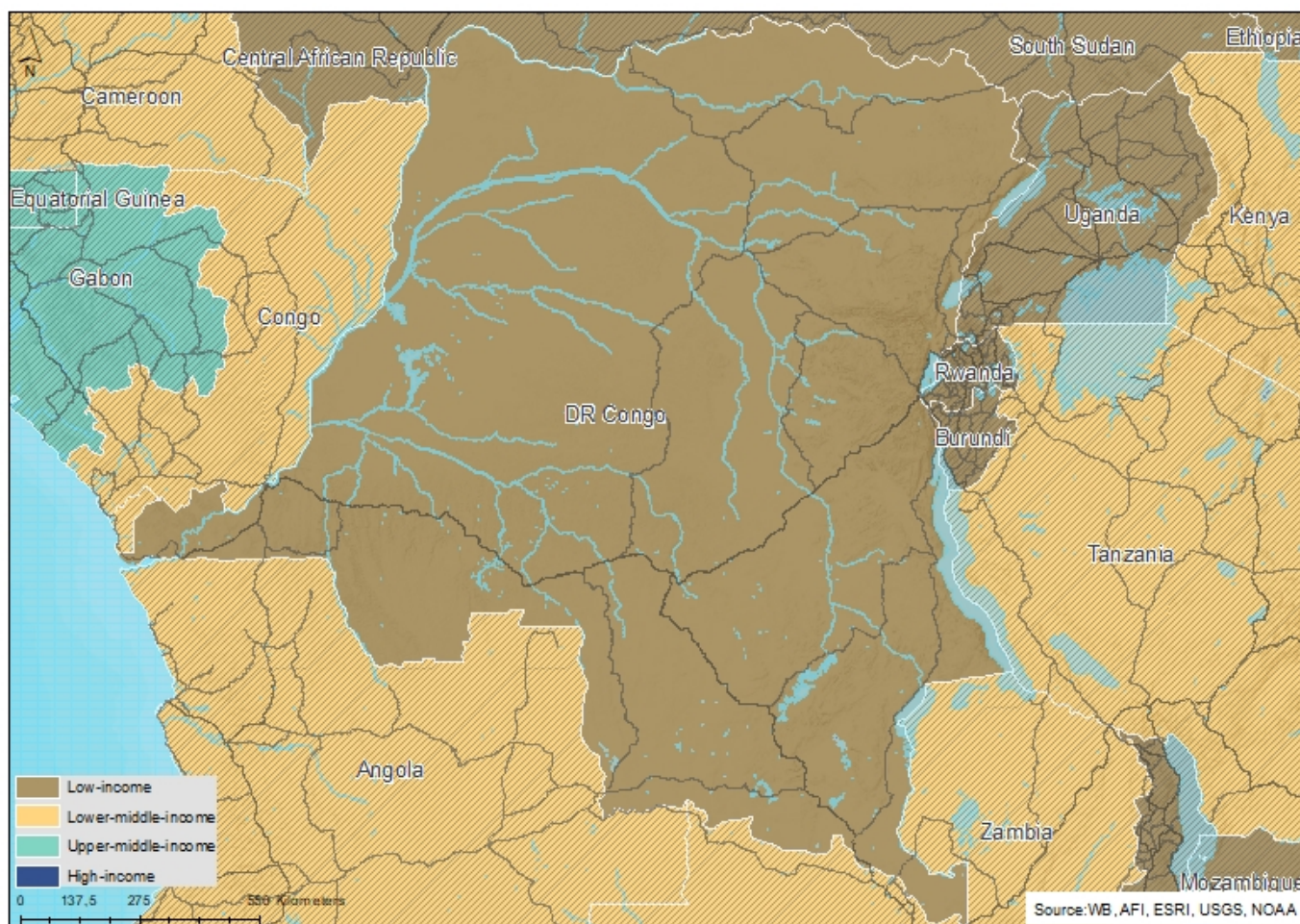


Chart 1 is a political map of DR Congo.

The Democratic Republic of the Congo (DR Congo) (also known as Congo-Kinshasa and formerly known as Zaïre) is located in Central Africa. The country is bordered to the north by the Central African Republic and South Sudan, to the east by Uganda, Rwanda, Burundi and Tanzania, to the south-east by Zambia, and to the south-west by Angola. To the west are the DR Congo's short Atlantic coastline, the Angolan enclave of Cabinda and Congo (Brazzaville). Kinshasa is the largest and capital city of the DR Congo.

The DR Congo is the largest country by land area in sub-Saharan Africa, the second largest in Africa and the 11th largest in the world. Its land area covers approximately 2 344 858 km<sup>2</sup>—an area approximately the size of Western Europe. The country has the second largest **tropical rainforest** (after Brazil) covering more than 992 000 km<sup>2</sup>.

The DR Congo is well known for its abundant and diverse mineral resources (mining is its largest industry), extensive navigable waterways, vast hydroelectric potential and arable land, estimated at 80 million hectares. The **country** possesses about 50% of the global cobalt reserves, 25% of the world's diamond reserves and large reserves of coltan. It is the largest producer of copper in Africa and the world's largest producer of cobalt.

Despite these abundant natural resources, the country remains one of the poorest and least developed in Africa and the world. Most people in the DR Congo have not benefited from this wealth. Since gaining its independence in 1960, conflicts, political instability, authoritarian rule and poor governance have impeded development progress and led to the ongoing humanitarian crisis in the eastern part of the country.



## DR Congo: Current Path

Chart 2: Population structure in Current Path, 1990-2043

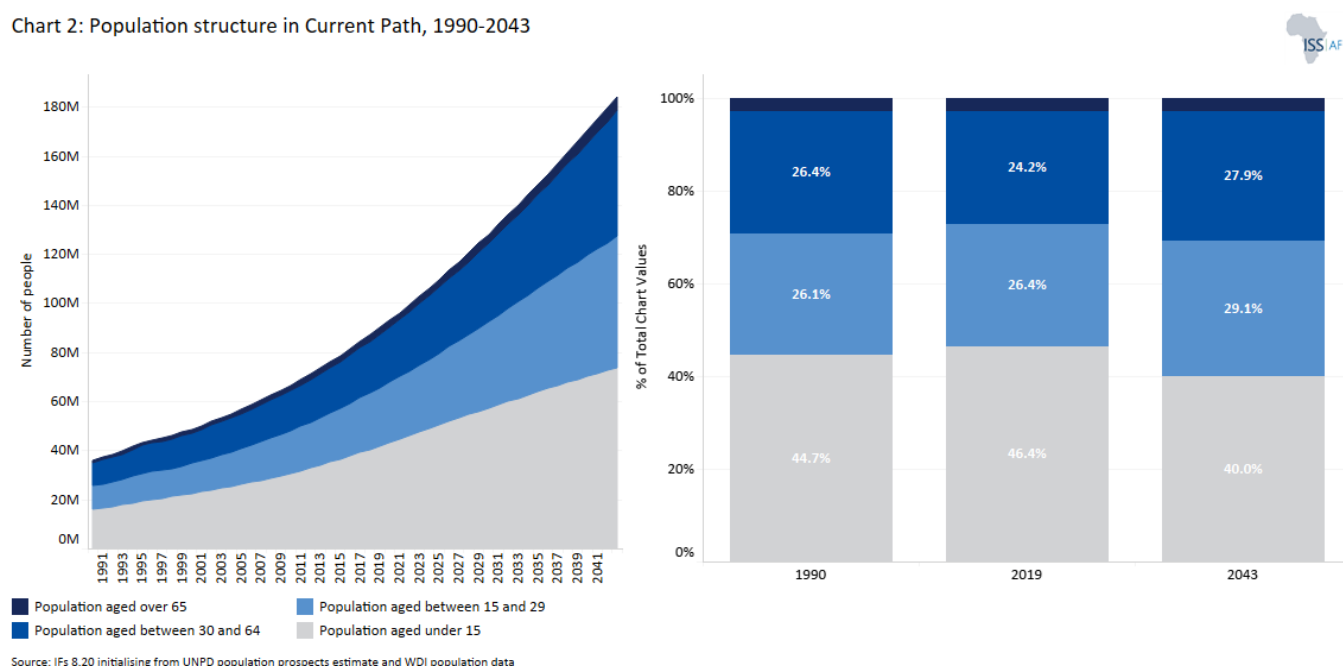


Chart 2 presents the population structure to 2043 in the Current Path forecast.

The DR Congo is one of the most linguistically diverse countries in the world, with about 215 distinct ethnic and linguistic groups. French, introduced by Belgian colonists, is the DR Congo's official language. However, most Congolese people are fluent in other languages such as Swahili, Lingala, Kikongo and Tshiluba. The majority of the population in the DR Congo is Christian, with nearly 70% of the population belonging to **various denominations**, followed by African religions, Islam and other beliefs.

With an **estimated population** of about 95.9 million in 2021, the DR Congo is the fourth most populated country in Africa and the 15th most in the world, after India, China, United States, Indonesia, Pakistan, **Nigeria**, Brazil, Bangladesh, Russia, Mexico, **Ethiopia**, Japan, Philippines and **Egypt**, respectively. The country has one of the fastest growing populations in Africa and globally, with an annual population increase of 3.3% in 2022. This is above the average population growth rate for low-income Africa (2.4%), Africa (2.5%) and the world (0.8%) in the same year.

The country's rapid population growth has a significant impact on the well-being of its people, exacerbating its high rate of malnutrition, poor education and healthcare services. With a growing population and a very high number of dependants (people younger than 15 years old and older than 65) versus working-age people (15–64 years old), social conditions like poverty and hunger will increase as the effects of rapid population growth hit the poorest first and GDP per capita is reduced. The state's negligible provision of medical care — along with poverty, violence and endemic disease—has led to low life expectancy at 62.9 years in 2022. This is below the averages for low-income African countries (64.8 years) and Africa (66.5 years). The DR Congo also has a very large youth bulge, with around 49% of its adult population aged 15 to 29 in 2022. By 2043, the proportion will only have declined to about 45%. Generally, a youth bulge above 40% is indicative of potential for instability.

The IFs Current Path forecast estimates that by 2043, the population of the DR Congo will increase by 60.6% over the next 20 years (2024–2043) to reach 164 million. The working population (age 15–64 years old) will account for about 60% of the population in 2043. This can be a potential source of growth provided the labour force is well-trained and sufficient jobs

are created. The population 15 years old and younger is expected to decline, constituting about 36.9% of the population in 2043, while the share of elderly people (65+ years) is projected to be 3.8%.

Chart 3: Population distribution map, 2022

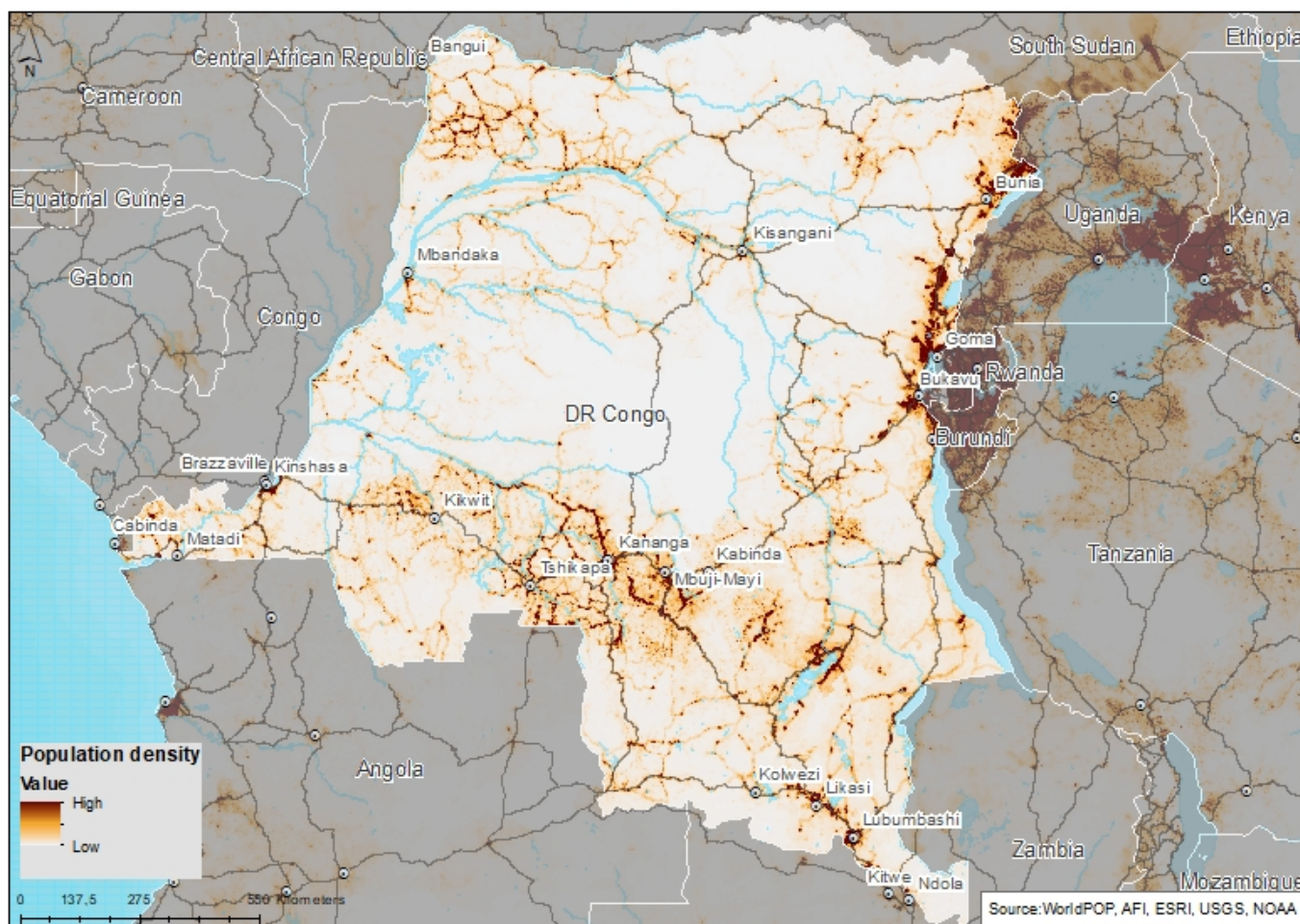


Chart 3 presents a population density map.

The population density of the DR Congo was 0.42 people per hectare in 2021, which is comparable to the averages of low-income African countries (0.44 people per hectare) and the continent (0.47 people per hectare). In the Current Path forecast, the country's population density is projected to remain below one inhabitant per hectare by 2043, which is on par with the projected averages for low-income African countries and the continent in the same year.

The country's population is concentrated on the plateaus, in the savannah near rivers and lakes. The north and the centre of the country, a domain of the jungle, are almost empty. The rural exodus, induced by factors such as avoiding conflict and its attendant risks as well as inadequate rural services, has swollen the population of the cities. The largest cities are Kinshasa, Lubumbashi, Mbuji-Mayi, Kananga, Kisangani and Bukavu.

Chart 4: GDP in MER and growth in the Current Path forecast, 1990-2043

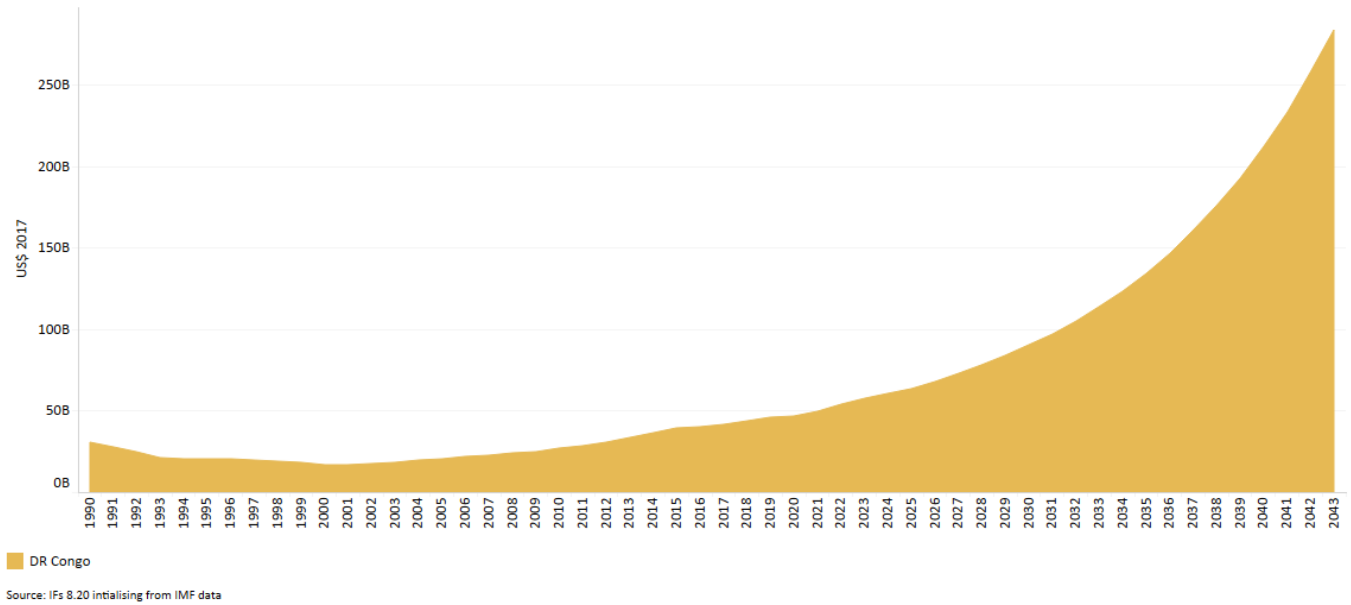


Chart 4 presents the size of the DR Congo’s economy from 1990 and includes a forecast to 2043 including the associated growth rate.

The Congolese economy was particularly hard hit by the series of violent conflicts in the 1990s. For instance, from 1990 to 2003, the size of the economy shrank by about 40%. The mining sector, which was the mainstay of the economy, collapsed.

Following the signing of an all-inclusive peace agreement in 2002, the transition government, led by Joseph Kabila, reengaged with international financial institutions leading to a resumption of support from the World Bank and the IMF. Several reforms and policies implemented under the auspices of the Bretton Woods Institutions, in conjunction with a rebound in post-war economic activity, served to control hyperinflation and revived economic growth. In 2002, after a recession that had lasted a decade, the country returned to growth.

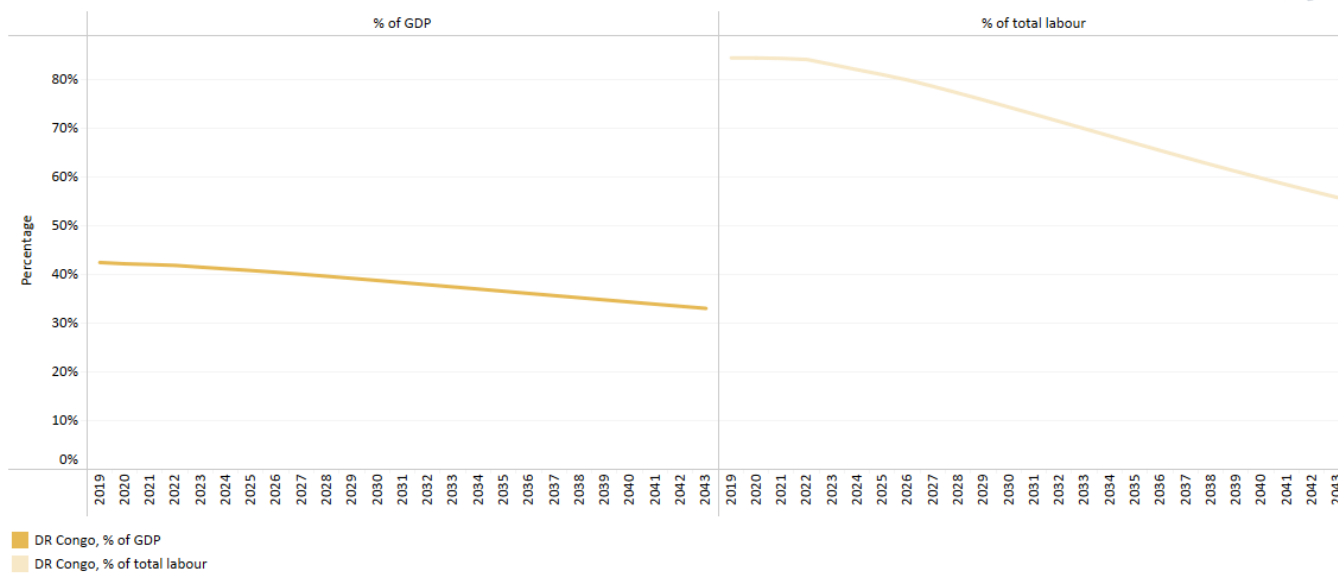
Buoyed by rising commodity prices, the DR Congo recorded an average growth rate of 7.9% from 2010 to 2015, compared to an average of 4.3% for sub-Saharan Africa over the same period. However, the subsequent cyclical fluctuations in commodity prices slowed the average growth dynamics to 3.3% from 2016 to 2019 and revealed the country's high exposure to commodity price shocks. During the COVID-19 pandemic year (2020), the country recorded a growth rate of 1.7%—a 2.8 percentage point drop relative to 2019. Overall, the GDP in 2020 increased from US\$44.9 billion in 2019 to US\$45.7 billion. This was an increase of about US\$784.8 million compared to an average increase of around US\$1.9 billion between 2016 and 2019.

In 2021, the DR Congo’s economy expanded by 6.2%, mainly driven by increased mining production and high global prices of commodity exports. The country is heavily dependent on commodity trade, particularly oils, copper, cobalt, tin, tungsten and tantalum. In the same year, the size of the economy was US\$48.3 billion, up from US\$29.7 billion in 1990. The hydrocarbon sector has dominated the economy. For the past 15 years, the share of the hydrocarbon sector has fluctuated around an average of 42% of GDP, the service sector about 33% of GDP, while agriculture, forestry and fishing represent 6% of GDP.

By 2043, the size of the DR Congo’s economy is projected to grow to US\$179.2 billion. The country’s current extractive industry-driven growth model is fragile and holds little promise for improvements in livelihoods. Without a significant

structural transformation of the economy, economic growth will continue to be at the mercy of commodity price shocks. The underinvestment in education, healthcare and physical infrastructure, as well as weak governance institutions, have underscored the limits of extractive industry-driven growth and the importance of **economic diversification** in the DR Congo.<sup>[2]</sup> With the expected decline in demand for fossil fuels from the global transition to a lower carbon economy, the country's growth model may have a limited time frame.

Chart 5: Size of the informal economy, as per cent of GDP and per cent of total labour, 2019-2043



Source: IFS 8.20 initialising from Elgin and Oztunali (2008), and Schneider and Enste (2012) data

Chart 5 presents the size of the informal economy as a per cent of GDP and in absolute terms, as well as the per cent of total labour involved in the informal economy.

The informal sector is a crucial lifeline for many people in the DR Congo. According to the country's Ministry of Labour, employment is dominated by the **informal sector**, which accounts for about 88.6% of total employment—59.7% in the agriculture sector and 28.9% in the non-agriculture activities.

In 2021, the size of the informal economy represented about 42.6% of the country's GDP, and by 2043 it is projected to decline significantly to 34.5%, which is above the averages of 26.6% and 24.3% for low-income African countries and Africa, respectively. Although the informal economy provides a safety net for the large and growing working-age population in the country, it impedes economic growth and hinders improved economic policies. Reducing informality will allow more people to benefit from better wages and redistributive measures. Therefore, the DR Congo needs to reduce the size of its informal economy with the least friction possible by reducing the hurdles to registering a business, tackling corruption and improving access to finance.

Chart 6: GDP per capita in Current Path forecast, 1990-2043

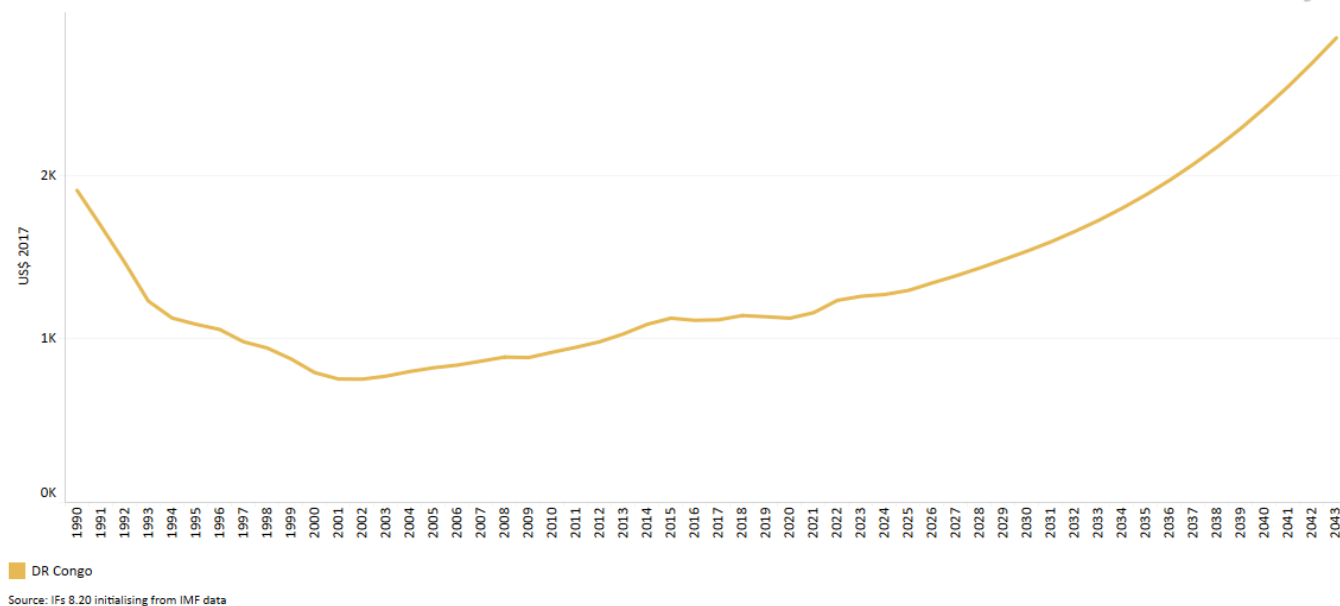


Chart 6 presents average GDP per capita from 1990 and includes the Current Path forecast to 2043.

Although many of the charts in the sectoral scenarios also include GDP per capita, this overview is an essential point of departure for interpreting the general economic outlook of the DR Congo. The country failed to fulfil any of the Millennium Development Goals (MDGs) by 2015 and remains a low-income country with one of the lowest GDP per capita in the world. The country ranks 179th of 191 countries on the 2021/2022 Human Development Index.

The series of violent conflicts in the 1990s have had a knock-on effect on economic growth and income. For instance, over the period 1990 to 2003, the GDP per capita declined to nearly 29% of its level at independence in 1960. In 2021, GDP per capita in the DR Congo amounted to US\$903.6, equivalent to about 48.3% of African low-income countries average in the same year and about 55.1% less compared to its level in 1960.

The country's GDP per capita is forecast to increase to US\$1 971.8 in 2043, equivalent to 60.2% of low-income African countries' projected average in the same year.

Chart 7: Extreme poverty in Current Path as % of population and numbers, 2019-2043

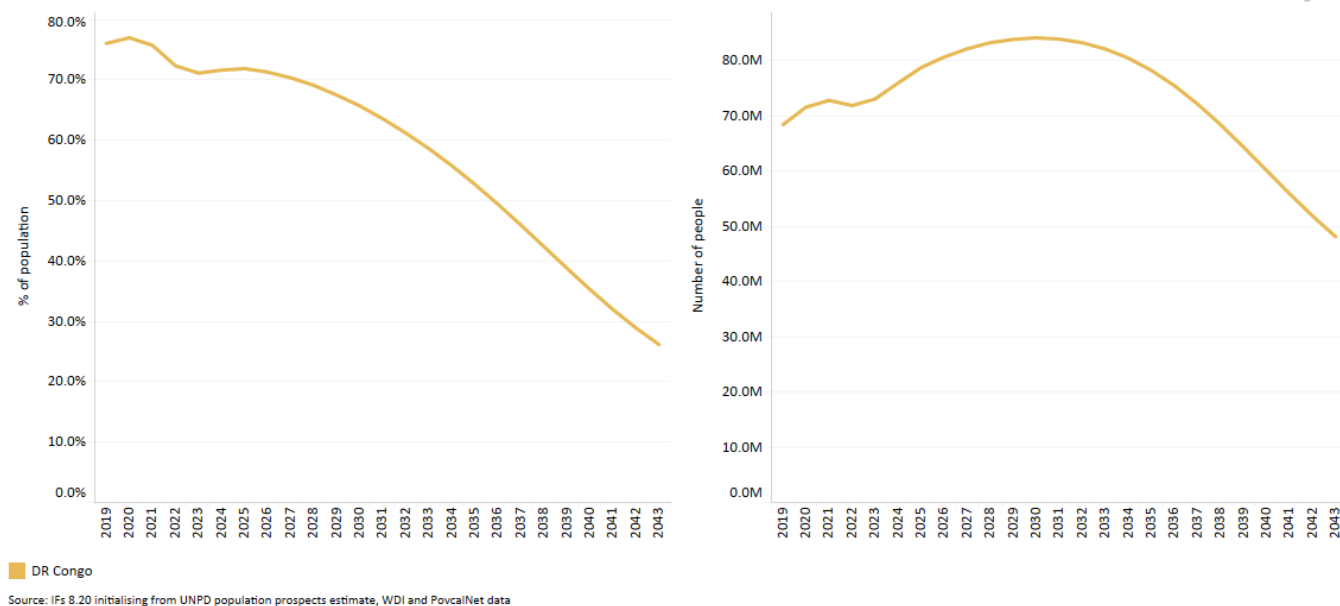


Chart 7 presents the number of people living in extreme poverty, also expressed as a per cent of the population.

In 2015, the World Bank adopted US\$1.90 per person per day (in 2011 prices using GNI), also used to measure progress towards achieving Sustainable Development Goal (SDG) 1 of eradicating extreme poverty. In 2022, the World Bank updated the US\$1.90 to US\$2.15 in 2017 constant dollars. They are:

- US\$3.20 for lower-middle-income countries, now US\$65 in 2017 values.
- US\$5.50 for upper-middle-income countries, now US\$6.85 in 2017 values.
- US\$22.70 for high-income countries. The Bank has not yet announced the new poverty line in 2017 US\$ prices for high-income countries.

This website still uses US\$1.90 and US\$3.20.

The DR Congo is one of the top five countries in the world with the most people living in extreme poverty, living on less than US\$1.90 (at 2011 prices) per day. In 2021, about 70.4% of the DR Congo's population, equivalent to 66.3 million people, lived in extreme poverty. Thus, approximately one out of four people who lived in extreme poverty in low-income African countries in 2021 lived in the DR Congo, and nearly one out of seven in sub-Saharan Africa lived in the DR Congo. The DR Congo has the second highest number of extremely poor people in Africa after Nigeria . Therefore, for the country to make significant progress towards the SDG target of reducing extreme poverty to less than 3% by 2030, a large reduction in poverty will be crucial. Ways for the DR Congo to reduce extreme poverty include educating children, ensuring basic healthcare, empowering woman and preventing child marriage.

In the Current Path forecast, in 2043, the DR Congo will be home to the highest number of extremely poor people in low-income Africa and remain the second highest in Africa, with 66.9 million people (about 40.8% of the population) living on the US\$1.90 per day poverty line.

Factors such as armed conflicts, poor governance, high fertility rates, infrastructure shortages and low schooling

completion are some of the root causes of the poverty of millions of Congolese people. Policymakers in the DR Congo should make growth more inclusive by integrating the most vulnerable segments of the population, especially women, into the economy and enhancing human capital formation to meet the needs of the labour market and hence create more gainful jobs and accelerate poverty reduction.

### **National Development Plan**



**RÉPUBLIQUE  
DÉMOCRATIQUE  
DU CONGO**

**PLAN  
NATIONAL  
STRATÉGIQUE DE  
DÉVELOPPEMENT**  
**2019-2023**





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The long-term development vision of the DR Congo is to build a diversified economy with inclusive growth to become a middle-income economy and overcome poverty. The overall aim of the [National Development Plan \(2019–2023\)](#)<sup>[1]</sup> is to overcome poverty.

The plan includes five pillars for improvement:

1. Human capital development, social and cultural development
2. Strengthening good governance, restoration of state authority and consolidation of peace
3. Consolidation of economic growth, diversification and transformation of the economy
4. Land use planning, reconstruction and modernisation of infrastructure
5. Environmental protection, fight against climate change, sustainable development and balance

## DR Congo: Scenarios

- Relationship between scenarios
- Demographics and Health scenario
- Agriculture scenario
- Education scenario
- Manufacturing scenario
- AfCFTA scenario
- Large Infrastructure and Leapfrogging scenario
- Financial Flows scenario
- Governance scenario

## Relationship between scenarios

Chart 9: Current Path and scenarios

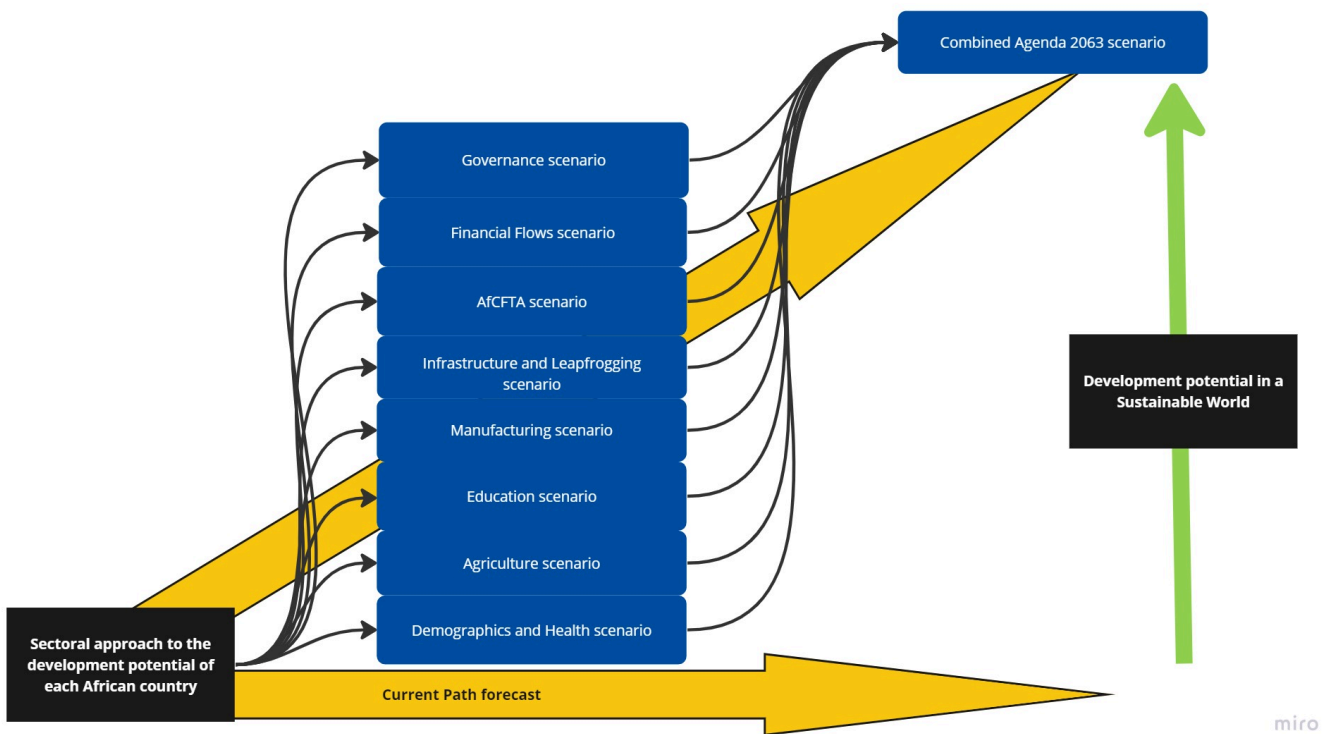


Chart 9 depicts the relationship between the Current Path forecast, the various sectoral scenarios and the Combined Agenda 2063 scenario.

The **Current Path** forecast is a dynamic scenario in the [International Futures forecasting platform](#) that imitates continuing current policies and environmental conditions.

The eight sectoral scenarios are each explained in the various themes on the website and the impact on each is compared

with the Current Path forecast and a Combined Agenda 2063 scenario. The eight scenarios are:

- A more rapid **demographic** transition and investments in better **health** and water, sanitation and hygiene (WaSH) infrastructure
- Better and more **education** (looking at quantity, quality and relevance)
- Large **infrastructure** and **leapfrogging** (the impact of renewables, ICT and the more rapid formalisation of the informal sector)
- Food security and an **agricultural** revolution
- A low-end **manufacturing** transition
- The full implementation of the **African Continental Free Trade Area (AfCFTA)**
- More inward **financial flows** (consisting of aid, foreign direct investment, remittances and illicit financial flows).
- Better **governance** (consisting of stability, capacity and inclusion)

The **Combined Agenda 2063** scenario is a combination of all eight sectoral scenarios.

The impact of these scenarios on **jobs/employment** and **greenhouse gas emissions and energy** are presented in separate themes.

A final theme models the effect of alternative **global scenarios** on Africa's development potential.

The interventions within IFs are detailed in an annexure at the end of this page.

## Demographics and Health scenario

Chart 10: Demographics and Health scenario

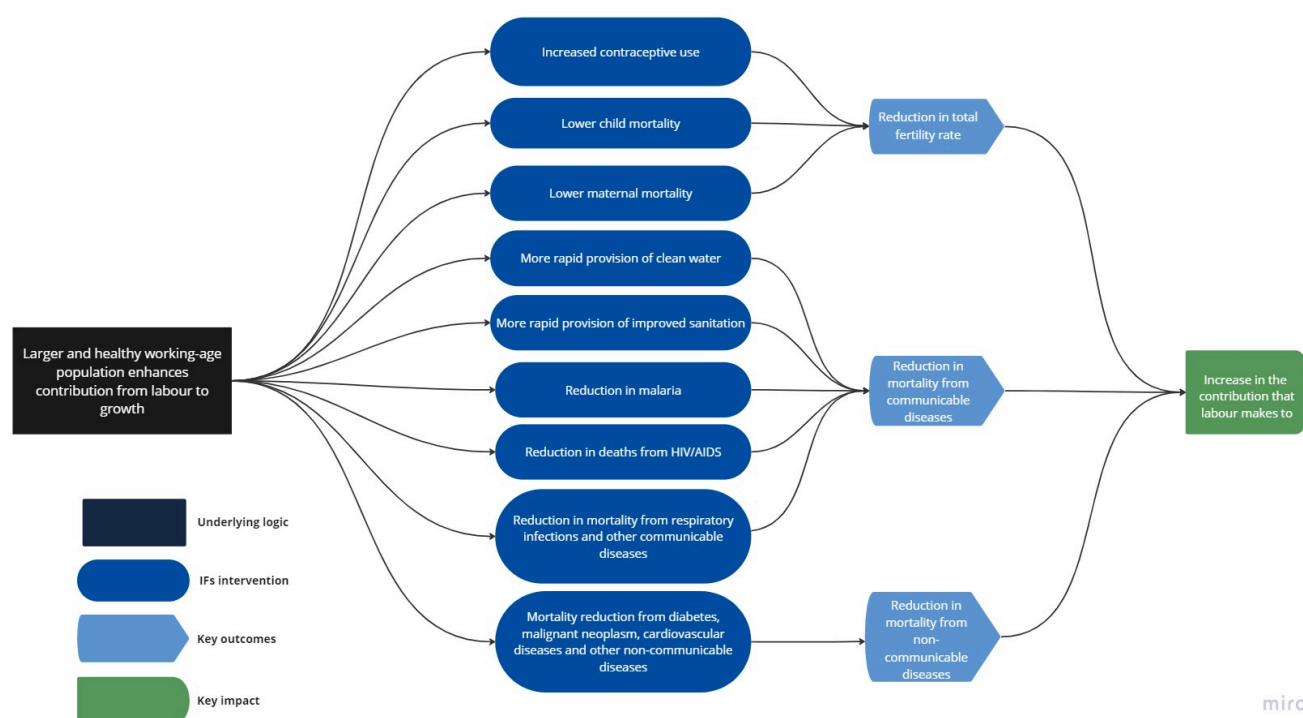


Chart 10 presents the structure of the Demographics and Health scenario as modelled in IFs that advances the demographic dividend and improves health.

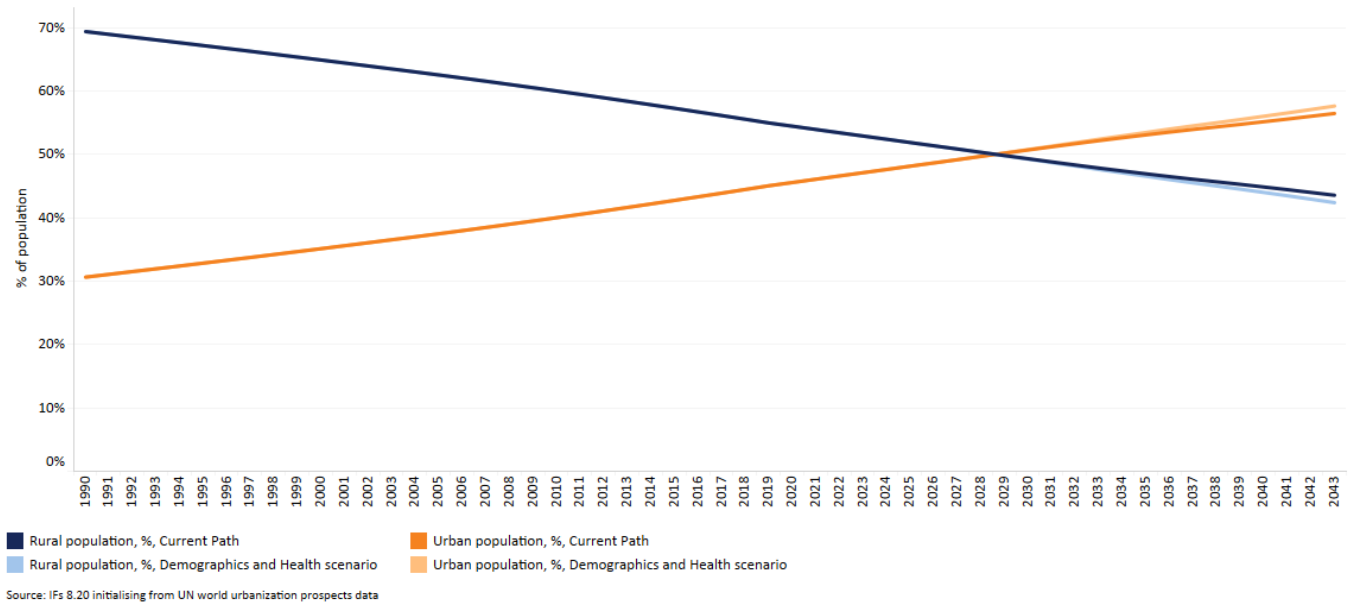
The Demographics and Health scenario consists of reasonable but ambitious reductions in child and maternal mortality ratio, increased access to modern contraception and reductions in the mortality rates associated with both communicable diseases (e.g. AIDS, diarrhoea, malaria and respiratory infections) and non-communicable diseases (e.g. diabetes), as well as improvements in access to safe water and better sanitation.

Visit the themes on [Demographics](#) and [Health/WaSH](#) for more detail on the scenario structure and interventions.

The characteristics of a country's population can shape its long-term social, economic and political foundations. Thus, understanding a nation's demographic profile indicates its development prospects. A healthy population is a key driver of labour and capital investment and economic growth. A healthier population can lead to higher GDP per capita in the long term due to its impact on population participation and productivity.

The DR Congo's health sector has been greatly impacted by the country's own protracted conflicts, as well as by the continued long-standing complex humanitarian crises in the world. This has been worsened by the COVID-19 pandemic and by recurrent disease outbreaks such as cholera, measles and Ebola. There is significant evidence that COVID-19 has had a negative effect on the utilisation of health services since March 2020, with a decline in hospital visits, a decrease in the number of antenatal care visits, reduction in access to family planning and contraception and increased food insecurity. Nearly 23 million children missed out on routine vaccinations in 2020 due to the COVID-19 pandemic—the highest number in more than a decade, according to [WHO/UNICEF data](#).

Chart 11: Urban and rural population in Current Path and Demographics and Health scenario, 1990-2043



Rapid population growth in the DR Congo goes hand-in-hand with rapid urbanisation. In 2021, about 45.3% of the population lived in urban areas, up from 30.6% in 1990. This is about 16.6 percentage points more than the average of 28.7% for low-income African countries.

On the Current Path development trajectory, the rate of urbanisation in the DR Congo is projected to increase to about 58.3% (nearly 95.4 million people) by 2043, while the rural population will drop to 41.7% by 2043 from about 69.4% in 1990 and 54.7% in 2021.

In the Demographics and Health scenario, the urban population in the DR Congo will decrease to about 92 million people (nearly 59.6% of total population). This is a reduction of about 3.5% (equivalent to nearly 3.4 million people) relative to the Current Path forecast in 2043. The size of the urban population in 2043 will be significantly above the projected average of low-income African countries by 17.3 percentage points in this scenario.

Rapid urbanisation in the DR Congo is associated with unemployment, poverty, inadequate healthcare, poor sanitation, urban slums and environmental degradation, especially in the main cities such as Kinshasa. Nearly three-quarters of the urban population in the DR Congo live in slums, which is 15 percentage points higher than the average for sub-Saharan Africa.

Chart 12: Infant mortality rate in Current Path and Demographics and Health scenario, 2019-2043

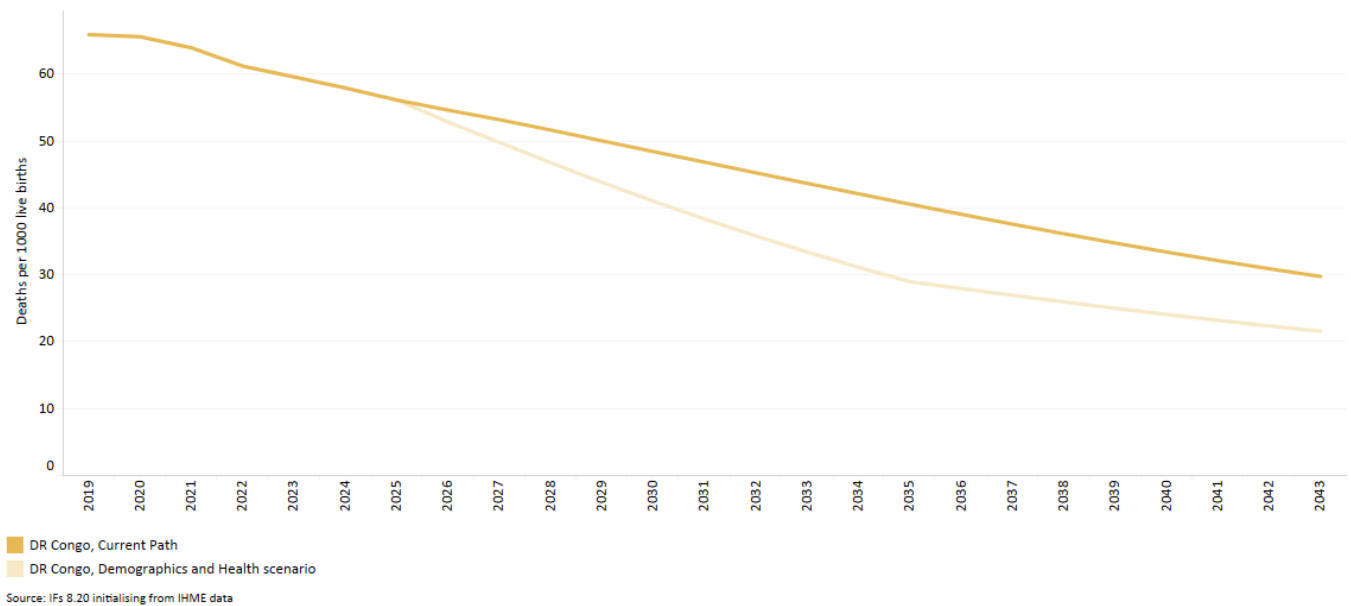


Chart 12 presents the infant mortality rate in the Current Path and the Demographics and Health scenario.

The infant mortality rate is the probability of a child born in a specific year or period dying before reaching the age of one. It measures the survival rate of children born and reflects the social, economic and environmental conditions in which children live, including their healthcare. The rate is measured as the number of infant deaths per 1 000 live births, and it is considered a proxy indicator of general population health. A high rate of infant mortality reflects precarious conditions such as poor nutrition, low access to safe drinking water and inadequate healthcare services.

At 49 infant deaths per 1 000 live births in 2021, infant mortality in the DR Congo was higher than the average of 46 and 43.6 deaths per 1 000 live births for low-income African countries and Africa, respectively. One reason for high infant mortality in the DR Congo is its reliance on a physical and healthcare infrastructure that has suffered from lack of investment and fallen prey to decades of protracted conflict, poor governance and economic mismanagement. The Demographics and Health scenario will reduce the infant mortality rate in the DR Congo to 19.2 deaths per 1 000 live births by 2043, compared to 27.1 deaths in the Current Path forecast.

When it comes to **fertility rates**, in 2021, the DR Congo had the fourth highest total fertility globally (an average of six births per woman) after Niger, Chad and Somalia, respectively. The fertility rate in the DR Congo is mainly driven by cultural values, which encourage people to have large families, and an early start to childbearing, which means more years of giving birth and less use of contraception. The Demographics and Health scenario will reduce the fertility rate from about four births per woman in the Current Path forecast to three births per woman in 2043.

Chart 13: Demographic dividend in the Current Path forecast and the Demographics and Health scenario, 1990-2043

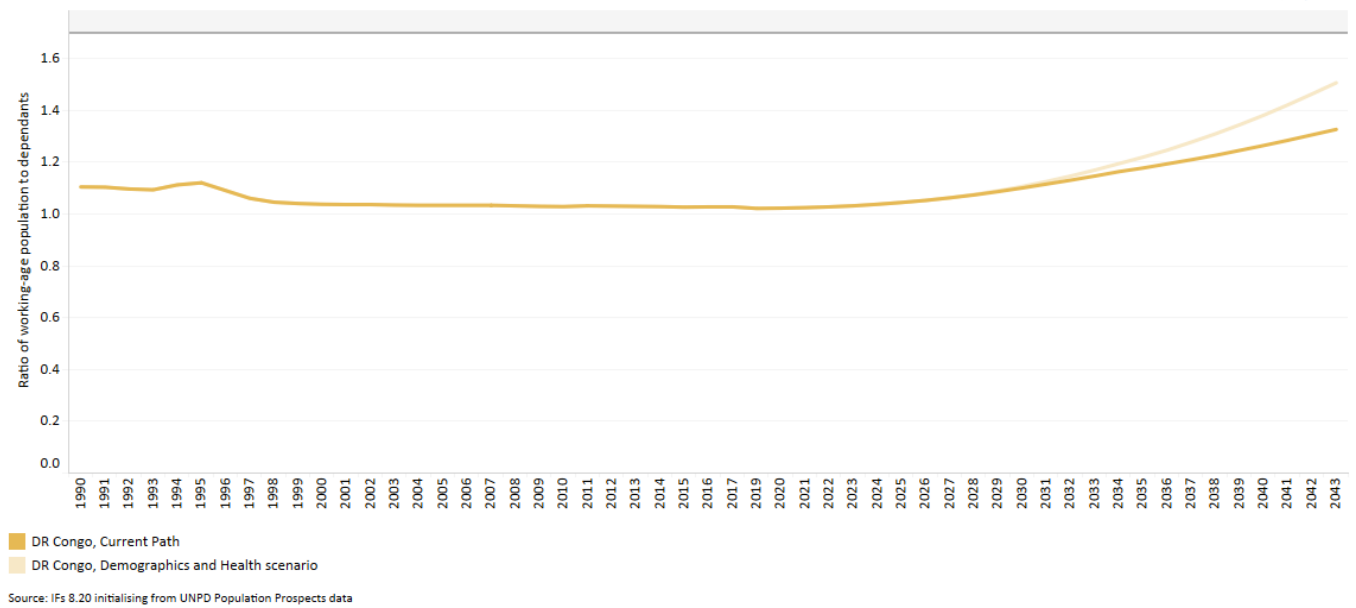


Chart 13 presents the demographic dividend in the Current Path and in the Demographics and Health scenario.

Demographers typically differentiate between a first, second and even a third demographic dividend. We focus here on the contribution of the size of the labour force (people between 15 and 64 years of age) relative to dependants (children and elderly people) as part of the first dividend. A window of opportunity opens when the ratio of the working-age population to dependants is equal to or surpasses 1.7.

In 2021, the ratio of the working-age population to dependants stood at 1.02 to 1. On the Current Path, it is forecast to be 1.5 to 1 by 2043. In the Demographics and Health scenario, the ratio of working-age population to dependants will be 1.7 to 1 by 2043. The minimum ratio of 1.7 to 1 described above will first be reached in 2043, six years earlier than the average for African low-income countries.

The increasing size of the working-age population in the DR Congo can be a catalyst for growth if sufficient education is provided and adequate employment is generated to successfully harness their productive power. Otherwise, it could turn into a demographic 'bomb' as many people of working age may remain in poverty, potentially creating frustration, social tension and conflict.

# Agriculture scenario

Chart 14: Agriculture scenario

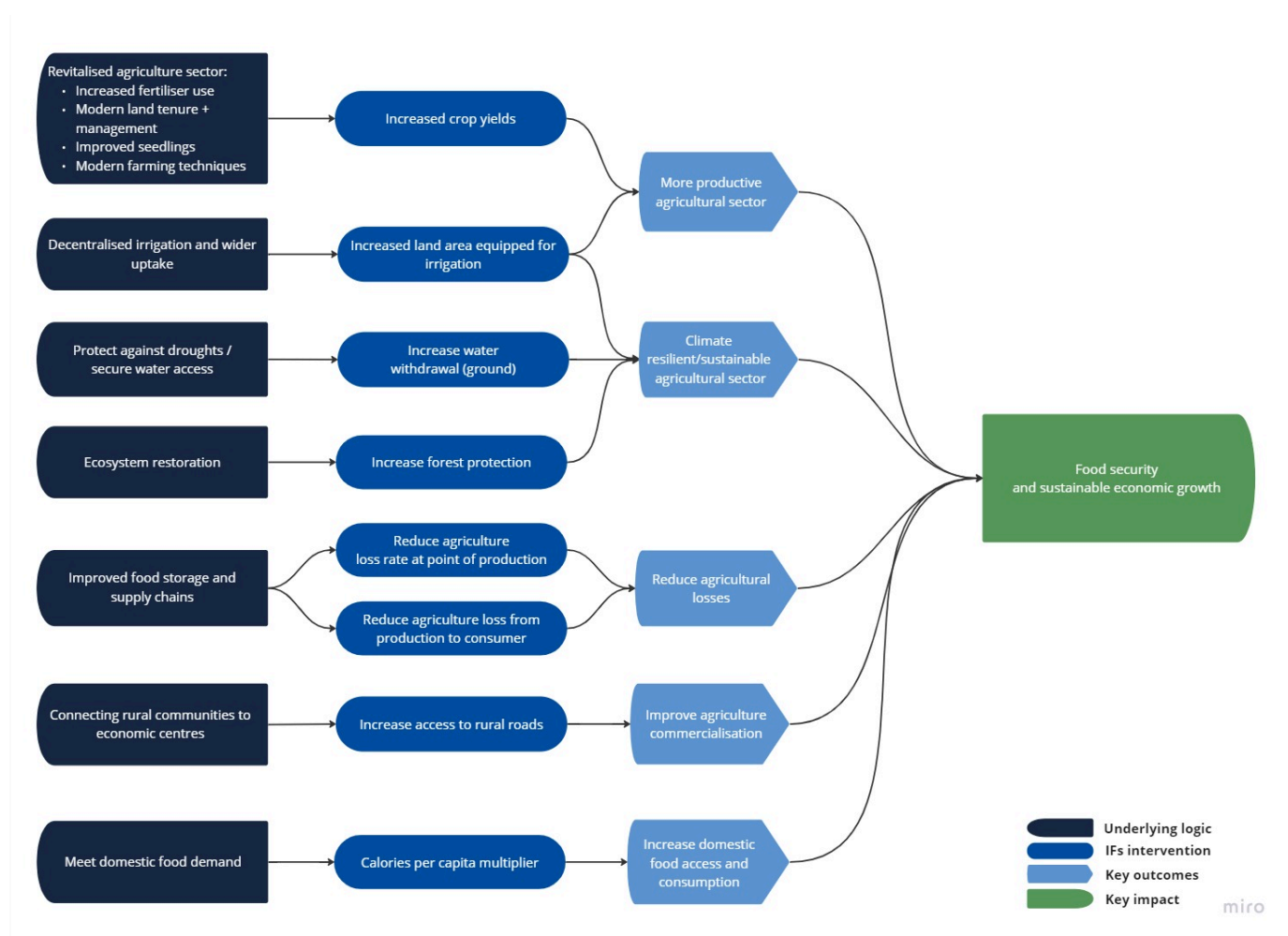


Chart 14 sets out the composition of the Agriculture scenario to advance food security.

The Agriculture scenario represents reasonable but ambitious increases in yields per hectare (reflecting better management and seed and fertiliser technology), increased land equipped and under irrigation and reductions in food loss and waste. We use increased calorie consumption as a proxy for food self-sufficiency above food exports as a desirable policy objective.

The increase in forest protection reflects sustainable land use practices.

Visit the theme on [Agriculture](#) for our conceptualisation and details on the scenario structure and interventions.

The DR Congo has more **agricultural land** than any other country in Africa. It has an estimated 80 million hectares of available arable land but only about 10% of this land is currently being cultivated. The country has the largest **untapped agricultural production**, with production potential capable of feeding a quarter of the world’s population. But the country has so far failed to make the required investments and policy changes to make this potential a reality.

Despite being the country with the largest available farmland in Africa, the DR Congo has not achieved food independence



and malnutrition is widespread. According to the Global Hunger Index 2023, the DR Congo is one of the world's most food-insecure countries, ranking 122nd out of 125, with an agricultural extension system that is apparently ineffectual. The main cash crops are coffee, palm oil, rubber, cotton, sugar, tea and cocoa. Food crops include cassava, plantains, corn, peanuts and rice.

The **agriculture sector** accounts for over 60% of new jobs, and in 2021, the sector accounted for about 19% of its GDP—a decline from about 56.5% in 1994. The agriculture sector in the DR Congo was severely affected by violent armed conflicts from 1996 to 2000. For instance, by 2006, agricultural productivity had **fallen** to 60% of its level at independence in 1960.

The DR Congo Agriculture Rehabilitation and Recovery Support project (ARRSP) aims to increase agricultural productivity by smallholder farmers. Other **constraints** on production include a lack of transport infrastructure, limited access to agricultural inputs and land disputes.

In 2021, crop yields were estimated at about 5 metric tons per hectare, a decline of nearly 1.5 metric tons per hectare in the past decade, however, above the estimated average of 2.9 metric tons per hectare for low-income African countries in the same year. In the Current Path forecast, crop yields are projected to increase to about 5.5 metric tons per hectare in 2043. In the Agriculture scenario, crop yields in the DR Congo will improve to 8.3 metric tons per hectare, which is an increase of nearly 2.8 metric tons per hectare relative to the Current Path forecast.

Chart 15: Import dependence in the Current Path and Agriculture scenario, 2019-2043

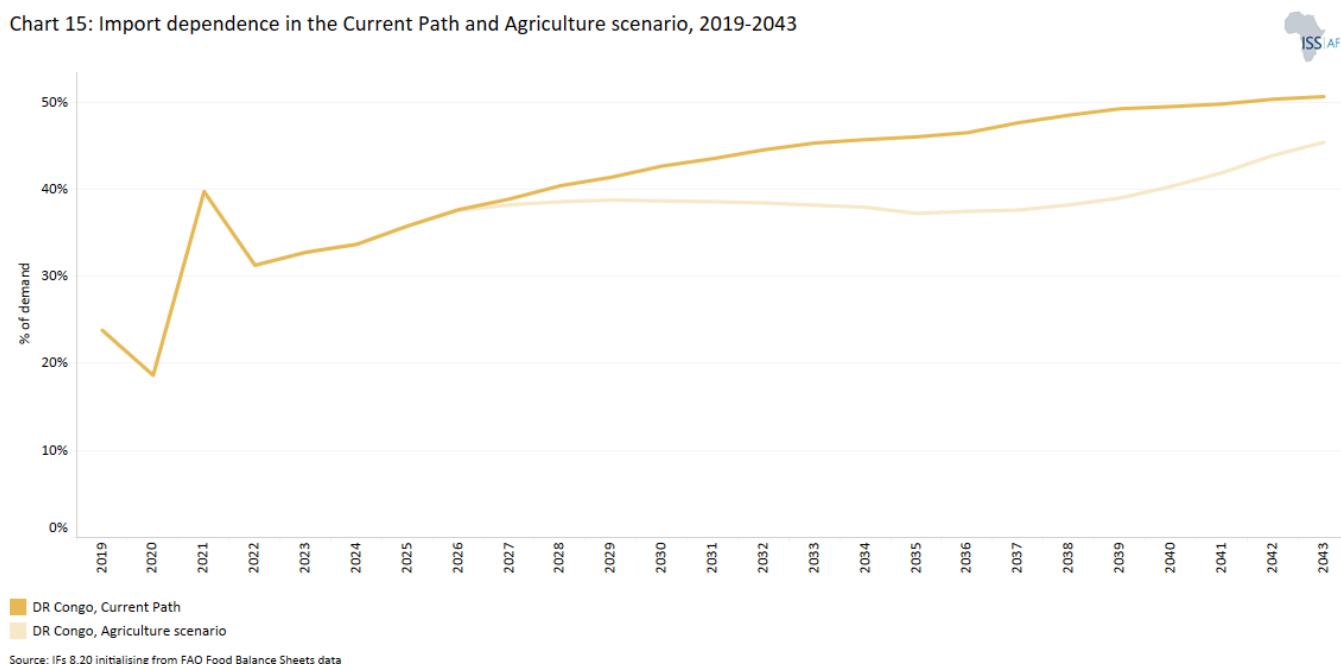


Chart 15 presents import dependence in the Current Path forecast and the Agriculture scenario.

The data on agricultural production and demand in the IFs forecasting platform initialises from data provided on food balances by the Food and Agriculture Organization (FAO). IFs contains data on numerous types of agriculture but aggregate its forecast into crops, meat and fish, presented in million metric tons. Chart 17 shows agricultural production and demand as a total of all three categories.

Without significant efforts to improve agricultural production, the current low crop yield will continue to make the DR Congo a net food importer for the foreseeable future. In 2021, the DR Congo's post-loss agricultural production (crop, meat and fish) stood at 59 million metric tons, falling short of 9.2 million metric tons to meet the year's agricultural

demand of 68.3 million metric tons.

In the Current Path forecast, by 2043, the gap between agriculture production and demand is projected to increase to nearly 50 million metric tons. The Agriculture scenario will increase post-loss production by nearly 4.1 million metric tons relative to the Current Path forecast of 90.3 million metric tons in 2043.

## Education scenario

Chart 16: Education scenario

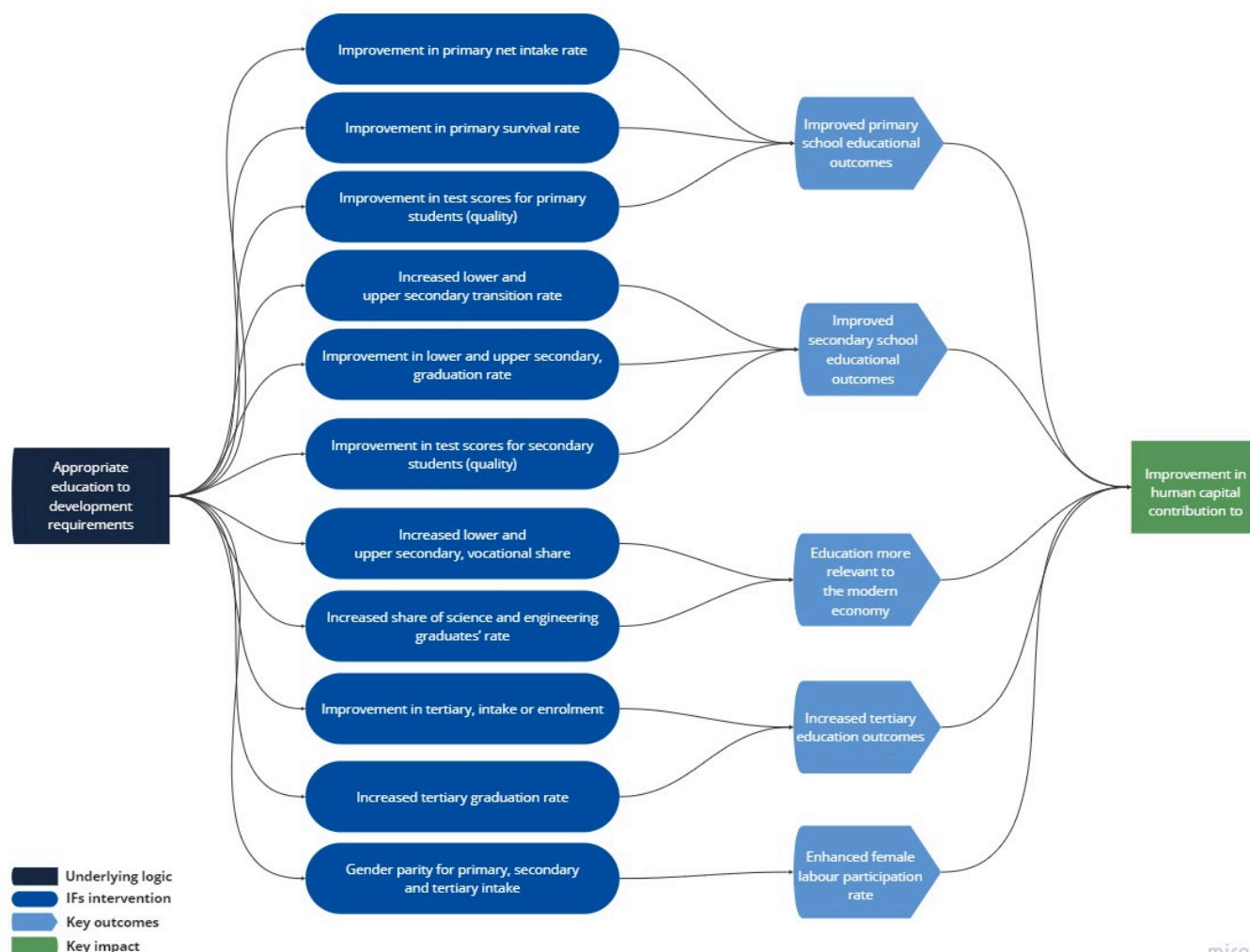


Chart 16 presents the structure of the Education scenario as modelled in IFs. The scenario improves the quantity and quality of education as well as its relevance to job requirements.

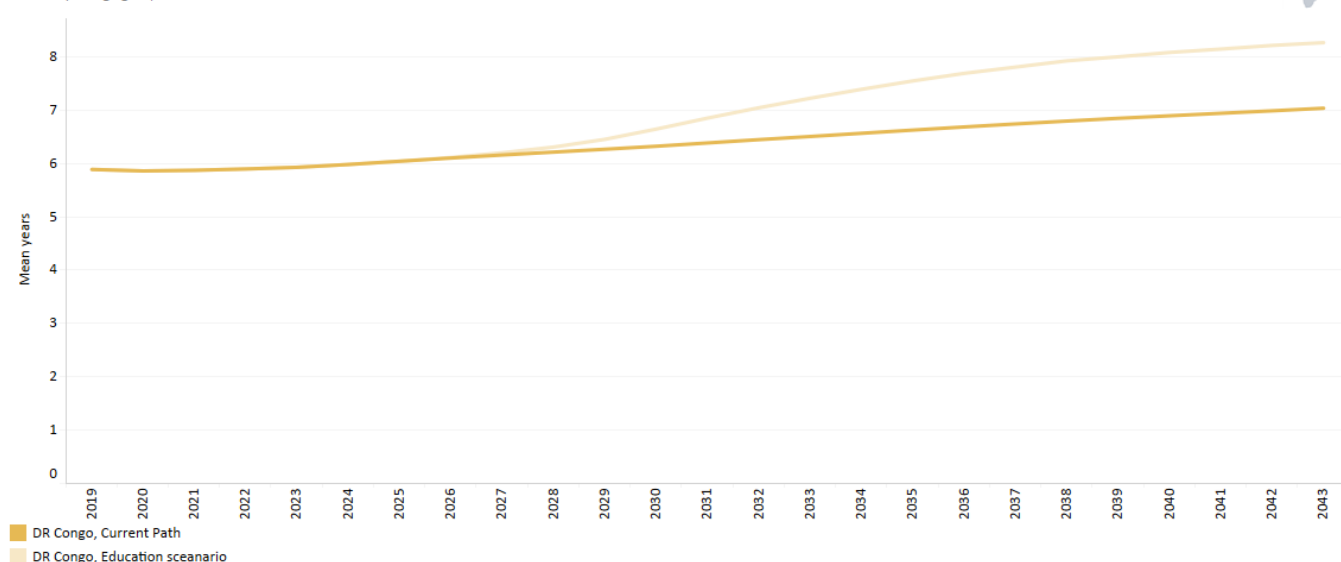
The Education scenario represents reasonable but ambitious improved intake, transition and graduation rates from primary to tertiary levels and better quality of education at primary and secondary levels. It also models substantive progress towards gender parity at all levels, additional vocational training at the secondary school level and increases in the share of science and engineering graduates.

Visit the theme on [Education](#) for our conceptualisation and details on the scenario structure and interventions.

Political instability and conflicts in the 1990s severely affected the educational outcomes in the DR Congo. In addition, widespread malnutrition, the difficulty of switching from mother tongue tuition to learning in French, and, in particular, financial constraints continue to hamper educational **outcomes**. Despite these challenges, the DR Congo has recorded a notable improvement in indicators related to education (i.e. literacy and net enrollment rates) in recent years. For example, the literacy rate for people aged 15 years and older improved from 61.2% in 2007 to 79.4% in 2021.

Quality education is crucial for economic development. It not only allows the country to increase its current added value but also creates tomorrow's technological innovations. Thus, Congolese authorities should accelerate reforms to improve the quality of education in the country.

Chart 17: Mean years of education in Current Path and Education scenario, 2019-2043  
15 to 24 year age group



Source: IFS 8.20 initialising from Barro-Lee data

Chart 17 presents mean years of education in the Current Path forecast and the Education scenario for 15 to 24 age group.

The average years of education in the adult population (aged 15 years and older) is a good first indicator of the stock of knowledge in society. However, since that measure changes only very slowly, Chart 17 presents the mean for the 15 to 24 age cohort.

The average years of education in the adult population (aged 15 to 24 years) is a good indicator of the stock of education in a country. The average years of education for adults aged 15 to 24 years was estimated at 6.8 years in 2021, about eight months above the average of low-income African countries. On the Current Path, the average years of education in the DR Congo is projected to improve to about 8.5 years by 2043, which is above the projected average of low-income African countries at 7.8 years in the same year. In the Education scenario, the mean years of education will increase to 10.1 years—an increase of about 1.5 years relative to the Current Path forecast in 2043.

Although the DR Congo has made **significant progress** in getting more children into school in recent years, the quality of education they receive is poor and not well suited to the needs of the job market. The main factors explaining this low quality of education are a shortage of teaching staff with the required skills, obsolete equipment and overcrowded classrooms. The **education sector** is underfunded: government spending on education was about 1.5% of GDP in 2021, while the average of low-income African countries was 3.6% of GDP.

In the Education scenario, the score for the quality of primary education will improve from 33.3 out of a possible 100 in 2021 to 35.7 in 2043—a 0.9% increase compared to the Current Path forecast of 35.4 in 2043. The score for the quality of secondary education will improve from 42.2 in 2021 to 41.7 in 2043 (in the scenario)—a 1.8% reduction in quality compared to the Current Path forecast of 42.4 in 2043.

By investing in the education of its citizens, the DR Congo can cultivate a foundation for innovation, economic advancement, and social harmony.

## Manufacturing scenario

Chart 18: Manufacturing scenario

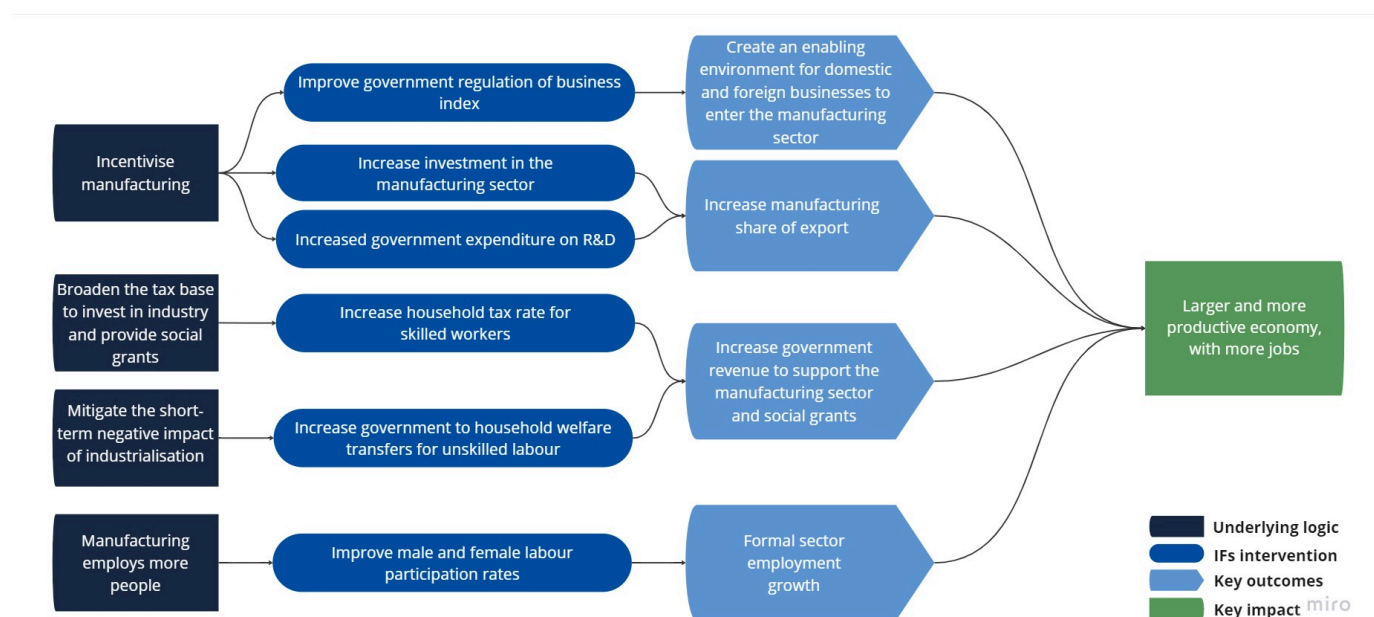


Chart 18 presents the structure of the Manufacturing scenario as modelled in IFs.

The Manufacturing scenario represents reasonable but ambitious manufacturing growth through greater investment in the manufacturing sector, in research and development (R&D) as well as improvement in government regulation of businesses. It increases total labour participation rates with a larger increase in female participation rates where appropriate. It is accompanied by increased welfare transfers (social grants) to unskilled workers to moderate the initial increases in inequality typically associated with a manufacturing transition.

Visit the theme on [Manufacturing](#) for our conceptualisation and details on the scenario structure and interventions. Chart 18 presents a summary chart that sets out the composition of the scenario.

In the DR Congo, manufacturing plays a marginal role in the country's economy. In terms of value added, the sector only contributed about 17.2% of GDP in 2021. Products include processed foods (particularly flour and sugar), beer and other beverages, cigarettes, textiles and clothing, footwear, processed wood and paper, chemicals, cement and bricks, glassware and metal goods, such as nails and metal furniture.

Chart 19: Value-add by the manufacturing sector in Current Path and Manufacturing scenario, 2019-2043

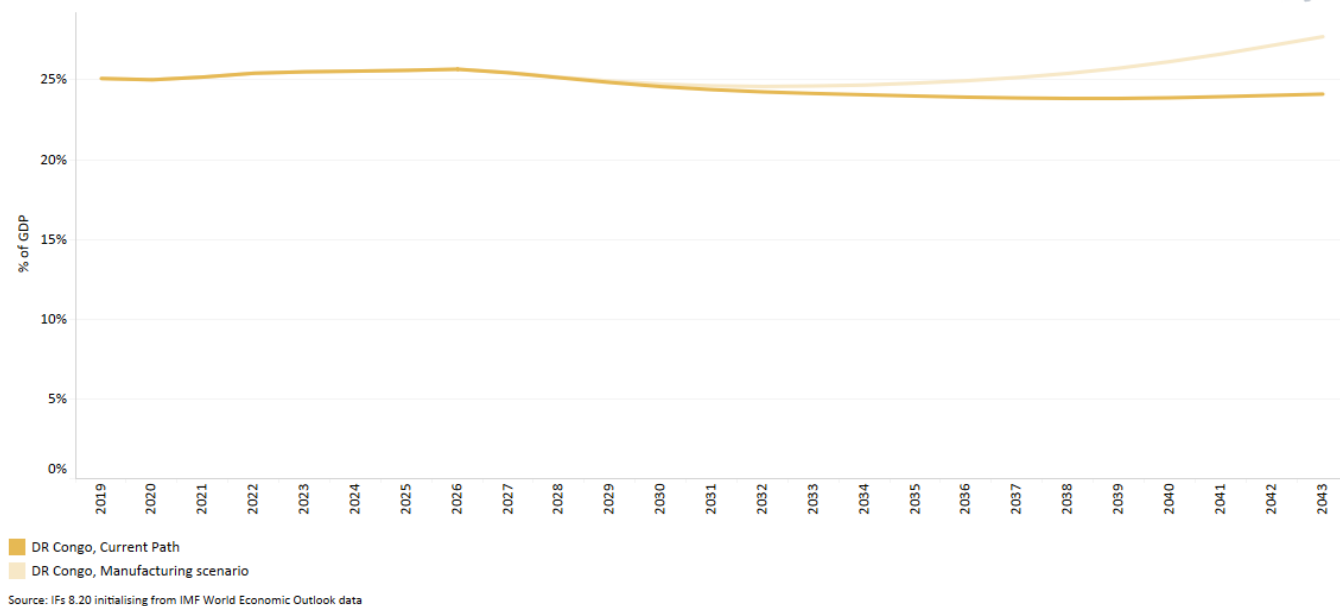


Chart 19 presents the contribution of the manufacturing sector to GDP in the Current Path and in the Manufacturing scenario. The IFs platform uses data from the Global Trade and Analysis Project (GTAP) to classify economic activity into six sectors: agriculture, energy, materials (including mining), manufacturing, services and information and communication technologies (ICT). Most other sources use a threefold distinction between only agriculture, industry and services, with the result that data may differ.

In the Current Path forecast, the manufacturing sector value-added contribution to GDP is projected to reach 25.2% by 2043. The manufacturing scenario will increase the share to 30.1% of GDP by 2043—an increase of nearly five percentage points relative to the Current Path forecast. Thus, the Manufacturing scenario will increase the size of the DR Congo’s economy by U\$16.9 billion relative to the Current Path forecast in 2043.

In addition to a larger economy, the Manufacturing scenario also reduces extreme poverty. Instead of 66.9 million people living below US\$1.90 in the Current Path forecast in 2043, 57.4 million (in the Manufacturing scenario) will live below the poverty threshold. This is the result of the inclusion of social transfers to unskilled workers and more rapid economic growth, as outlined in the Manufacturing scenario.

## AfCFTA scenario

Chart 20: AfCFTA scenario

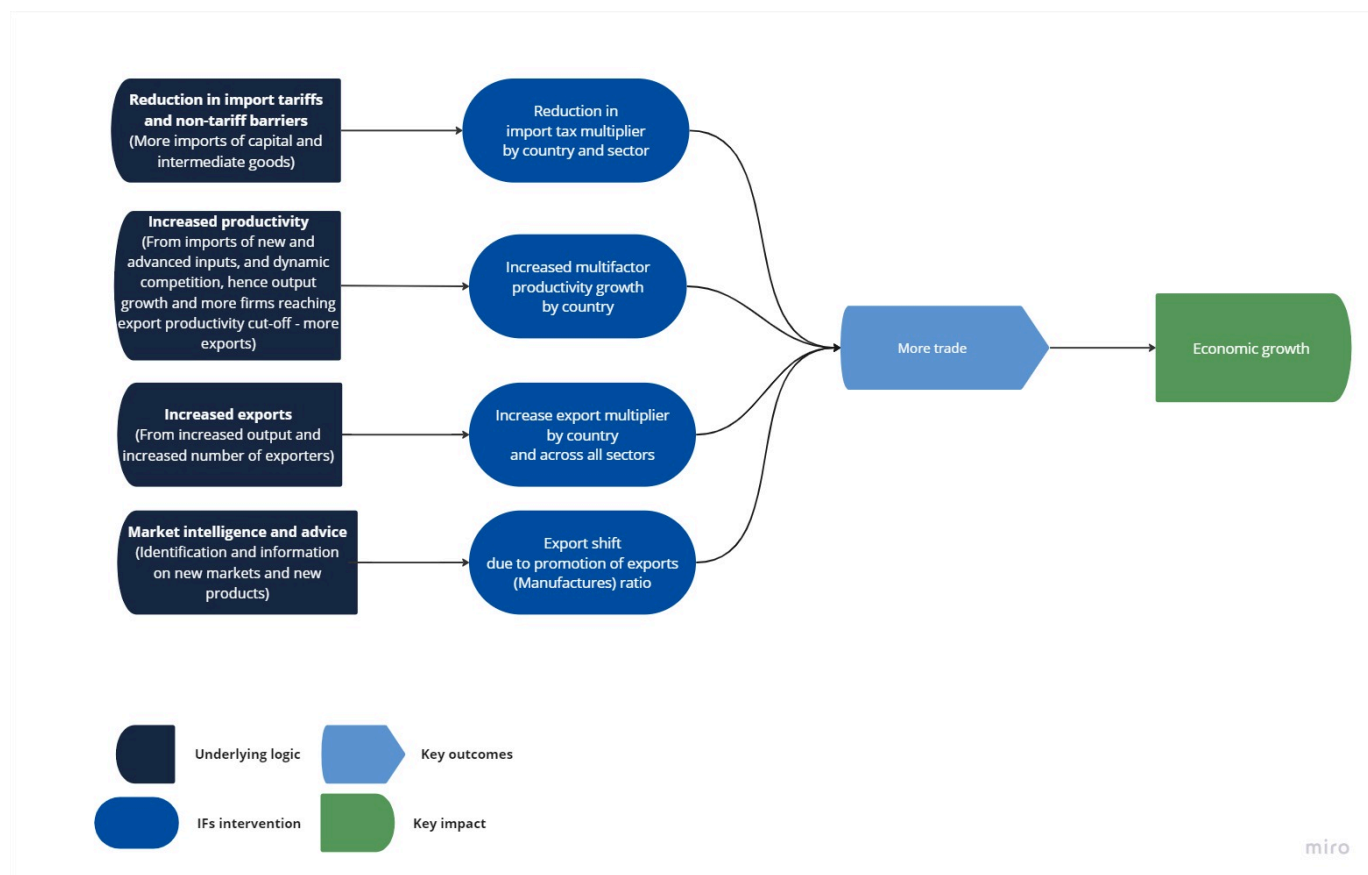


Chart 20 presents the structure of the AfCFTA scenario as modelled in IFs. The AfCFTA scenario represents the impact of fully implementing the continental free trade agreement by 2034. The scenario increases exports in manufacturing, agriculture, services, ICT, materials and energy. It also includes an improvement in multifactor productivity growth emanating from trade and a reduction in tariffs for all sectors.

Visit the theme on [AfCFTA](#) for our conceptualisation and details on the scenario structure and interventions.

International trade can help accelerate growth and improve living standards. In 2021, exports and imports represented 31% and 36% of GDP, respectively, in the DR Congo. The country's exports are highly concentrated in commodity goods, with the top five exports including refined copper and unwrought alloys, cobalt, unrefined copper, copper ores/concentrated and crude oil. Together these are the top five export products, representing about 92.2% of the country's exports.

According to the [Observation of Economic Complexity](#) (OEC), in 2021 the DR Congo was the world's biggest exporter of cobalt (US\$4.44 billion), tin ores (US\$282 million), copper alloys (US\$98 million) and cobalt ore (US\$92 million). In the same year, the value of exported refined copper was valued at US\$8.95 billion, raw copper at US\$779 million and crude petroleum at US\$582 million, destined mostly to China, the United Arab Emirates, South Korea, Saudi Arabia and Italy. The country's imports were mainly refined petroleum (US\$406 million), delivery trucks (US\$255 million), packaged medicaments (US\$254 million), poultry meat (US\$215 million) and stone processing machines (US\$170 million), sourced mostly from China, Zambia, South Africa, Rwanda and India.



The DR Congo deposited its instrument of ratification in February 2022 and became the 42nd country to ratify the AfCFTA. The **country** signed the AfCFTA in March 2018 and the National Assembly approved the treaty in April 2021.

Chart 21: Trade balance in Current Path and AfCFTA scenario, 2019-2043

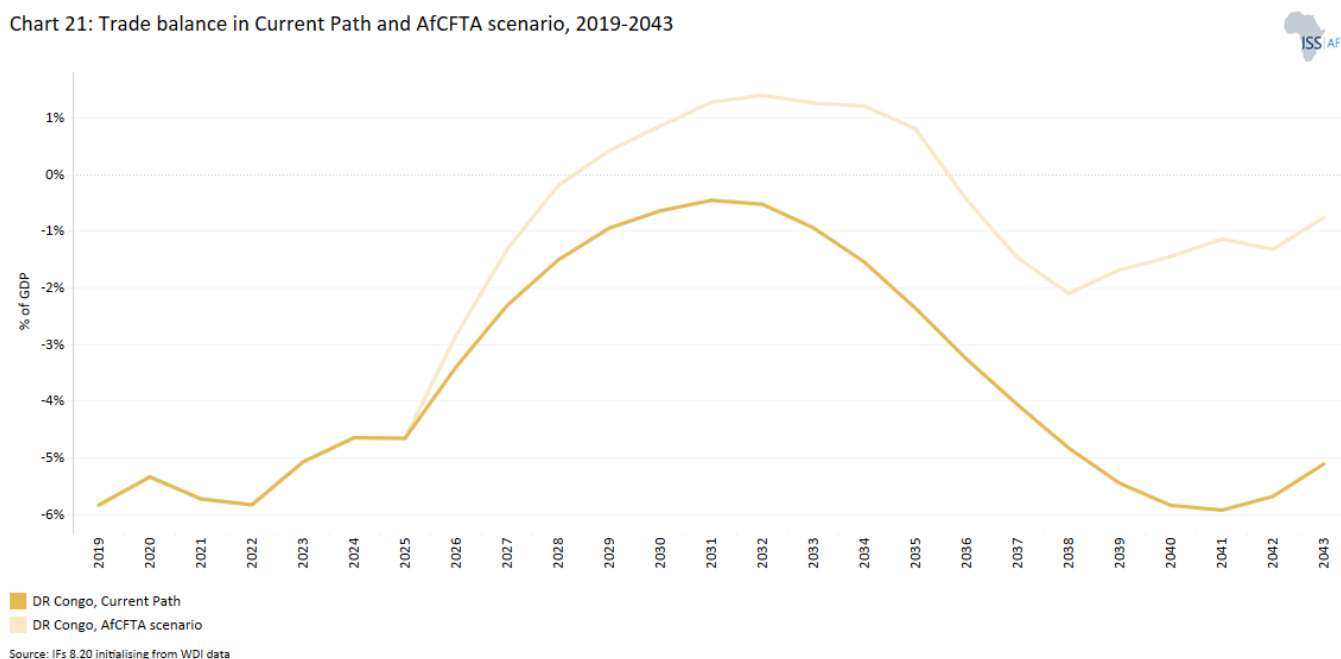


Chart 21 compares the trade balance in the Current Path forecast with the AfCFTA scenario.

Trade openness increases the size of the market available to domestic firms. As for the DR Congo, trade openness has led to significant progress in strengthening total trade (export plus imports), which represented 66.9% of its GDP in 2021.

The DR Congo's trade balance is structurally in deficit, and on the Current Path this trend is forecast to continue until at least 2043. The DR Congo's trade deficit will represent about 3.6% of GDP (equivalent to about US\$6.4 billion) in 2043, which is a slight improvement in trade balance compared to a deficit of 5% of GDP (equivalent to about US\$2.4 billion) in 2021.

In the AfCFTA scenario, the DR Congo's trade balance will become positive (a surplus) from 2028, with a trade surplus of US\$3.5 billion, equivalent to 1.1% of GDP in 2043, compared to a trade deficit of about 3.6% of GDP in the Current Path forecast in 2043. The trade surplus will come from the materials sector. In the AfCFTA scenario, the country's materials sector will have a trade surplus of US\$98.2 billion (equivalent to 31.9% of GDP) in 2043—an increase of about 2.5 percentage points relative to the Current Path forecast in the same year.

With the removal of trade restrictions following the implementation of the AfCFTA, it will become easier to import; however, DR Congo firms face intense competition on the export markets. Only using the trade balance is not a viable indicator to conclude that the DR Congo will be a loser in the implementation of AfCFTA, as other indicators need to be considered too.

## Large Infrastructure and Leapfrogging scenario

Chart 22: Infrastructure and Leapfrogging scenario

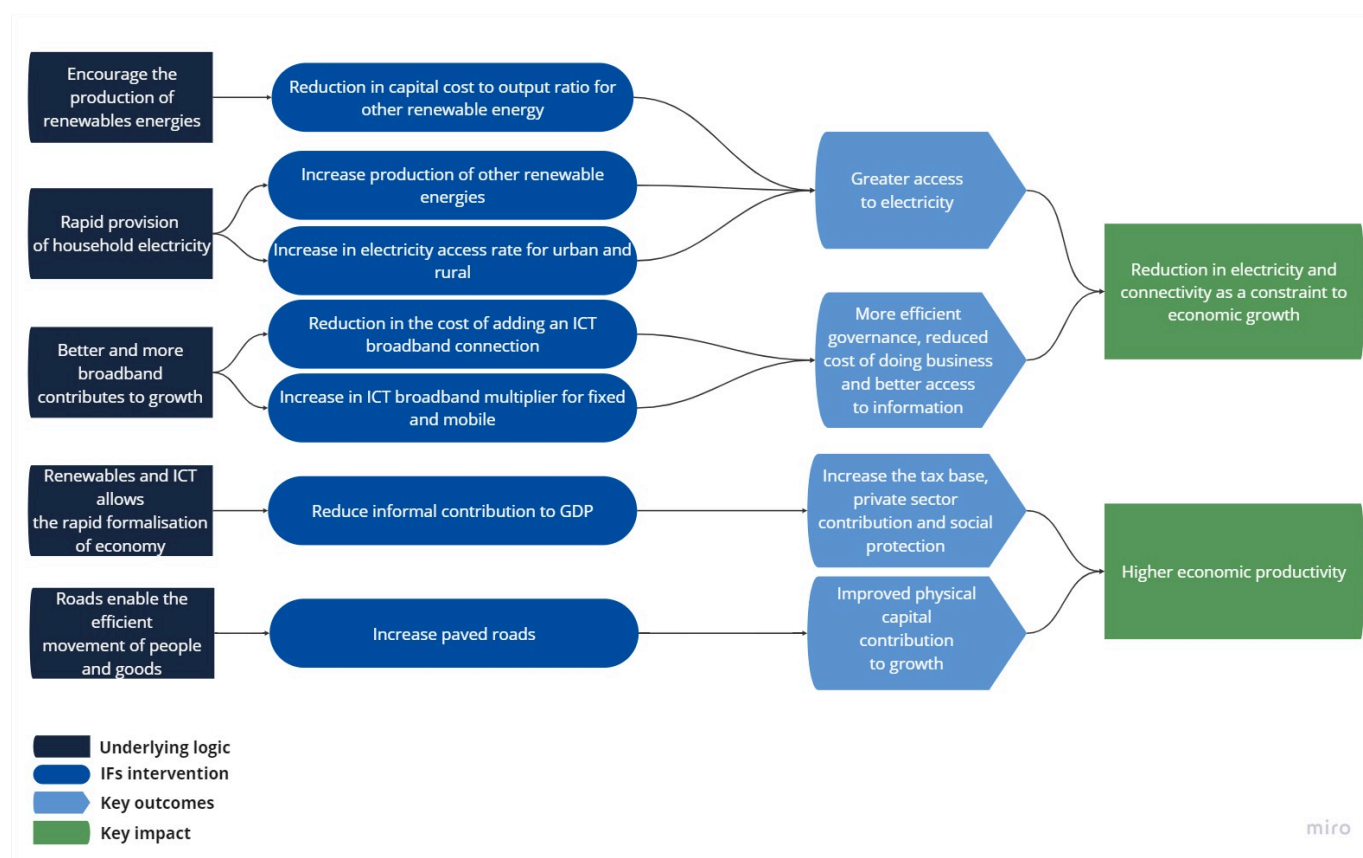


Chart 22 presents the structure of the Large Infrastructure and Leapfrogging scenario as modelled in IFs.

The Large Infrastructure and Leapfrogging scenario represents a reasonable but ambitious investment in road infrastructure, renewable energy technologies and improved access to electricity in urban and rural areas. The scenario includes accelerated access to mobile and fixed broadband and the adoption of modern technology that improves government efficiency and allows for the more rapid formalisation of the informal sector. A final intervention emulates investments in large infrastructure such as rail, port and airports.

Visit the themes on [Large Infrastructure](#) and [Leapfrogging](#) for our conceptualisation and details on the scenario structure and interventions. Chart 24 presents a summary chart that sets out the composition of the scenario.

Infrastructure shortage in the DR Congo is one of the key impediments to higher productivity and, hence, faster economic growth, particularly transport infrastructure. According to the [World Bank](#), the infrastructure investment needed in the DR Congo is among the highest in Africa.

Road transportation has always been a challenge and the country's vast geography, low population density, extensive forests and criss-crossing rivers further complicate the development of infrastructure networks. Due to a decade of war conflict, networks have been seriously damaged or left to deteriorate. Road and rail [infrastructure](#) is dilapidated, and the rail network has fallen into disuse. In 2021, the DR Congo's share of paved roads accounted for about 2.6% of total roads, and the share is forecasted to increase to 23.5% in 2043.

The country has abundant and varied energy resources such as hydroelectricity, biomass, solar, wind and fossil fuels. For instance, the country possesses a huge potential of hydroelectric power estimated at 100 GW, which represents about 13% of the world's hydroelectric potential. The country also has potential in other sources of energy, estimated at 70 GW for solar and 15 GW for wind power. In sum, the DR Congo has the potential to become a leading exporter of electricity in Africa.

Paradoxically, the country has one of the largest deficits in energy access in the world. The energy supply is largely insufficient for the country's needs and energy consumption comes mainly from biomass. Only 3% is generated by hydroelectric power, and the rest is from charcoal and firewood. Although progress has been made, the DR Congo still has one of the lowest rates of electrification globally. The share of the population with access to electricity increased from 6% in 2005 to 20.1% in 2021. IFs estimated electricity access at 20.8% in 2021, far below the 33.4% average of low-income African countries. By 2043, electricity access in the DR Congo is projected to increase to 46% of population.

Authorities in the DR Congo have taken several steps to overcome the infrastructure development problem, including entering into contracts with Chinese firms to modernise transport infrastructure. The country is continuing to implement reforms to make the energy and telecommunications sectors more efficient. Public-private partnerships have also been encouraged as a way to increase investment, including foreign direct investment (FDI), in infrastructure-related sectors.

Chart 23: Cookstove usage in Current Path and Infra/Leapfrogging scenario, 2019-2043

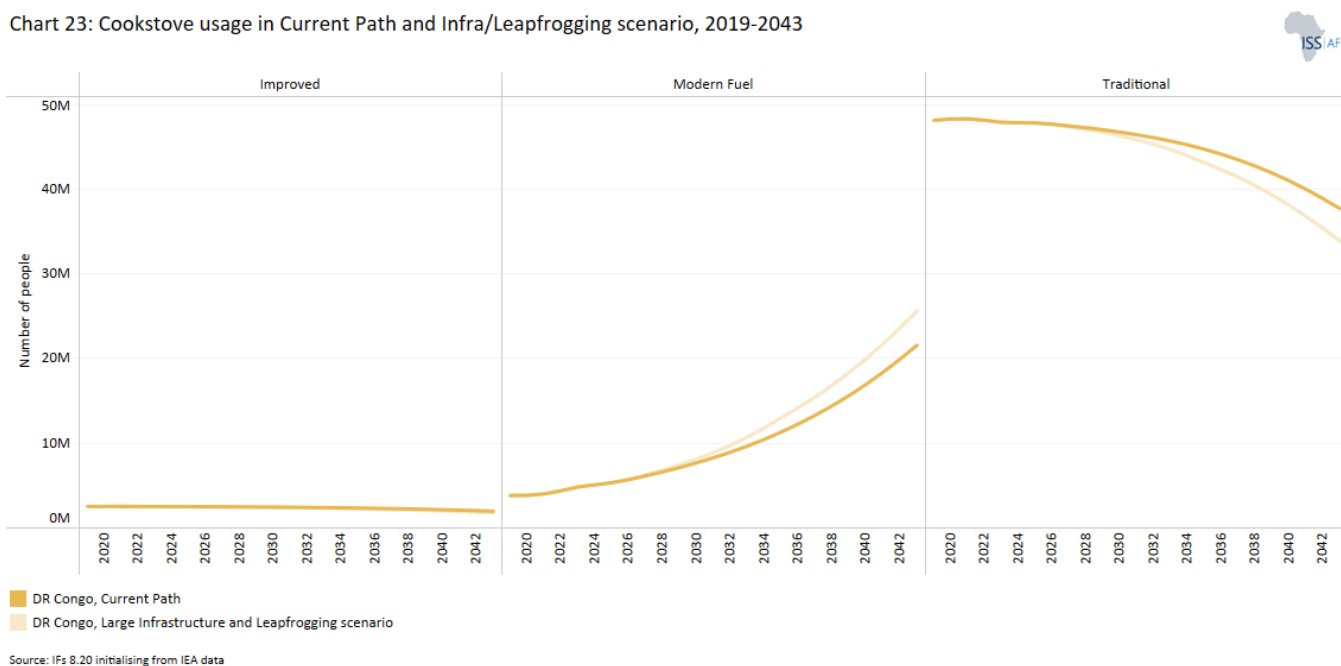


Chart 23 presents cookstove usage in the Current Path and the Large Infrastructure and Leapfrogging scenario.

With the low access to electricity in the DR Congo, many households use traditional cooking stoves, such as wood-burning and coal stoves. In 2021, about 87.2% of households in the DR Congo used traditional stoves for cooking, while nearly 4.6% used improved cooking stoves and about 8.3% used modern stoves.

In the Current Path forecast, in 2043, 68.3% of households will be using traditional stoves, while 3.6% will be using improved stoves and 28.1% will be using modern stoves. The Infrastructure and Leapfrogging scenario will reduce the use of traditional cookstoves to 64.2%, improved stoves to 3.4% and increase the use of modern stove to 32.4% of households by 2043.

Chart 24: Access to mobile and fixed broadband in Current Path and Infra/Leapfrogging scenario, 2019-2043

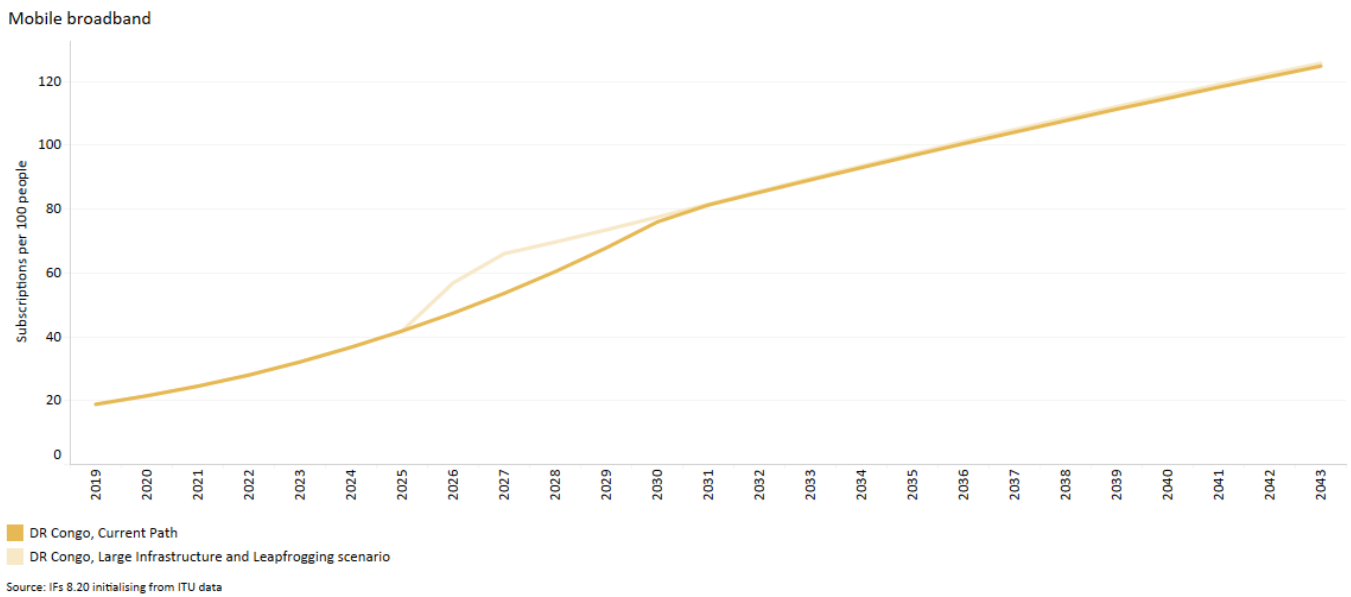


Chart 24 presents access to mobile and fixed broadband in the Current Path and the Large Infrastructure and Leapfrogging scenario.

Mobile broadband in Africa is expanding very rapidly, but fixed broadband lags.

The DR Congo has a very low fixed broadband rate relative to the average of its peers. In 2021, the country had about 1.6 subscriptions per 100 people, which was below the average of 2 subscriptions per 100 people for low-income African countries. In the Current Path forecast, the subscription rate will increase to 18.4 by 2043—less than the average projected for its peer African group. In the Large Infrastructure and Leapfrogging scenario, fixed broadband subscriptions are set to increase to 28 per 100 people by 2043.

The DR Congo had an estimated mobile broadband subscription rate of 12.3 per 100 people in 2021. The rate was significantly below the estimated average of 25.2 subscriptions per 100 people of low-income African countries. Mobile broadband subscription in the DR Congo is projected to increase rapidly reaching 121.7 subscriptions per 100 by 2043. The Large Infrastructure and Leapfrogging scenario will increase the rate by 0.9 subscriptions per 100 people relative to the Current Path forecast by 2043.

## Financial Flows scenario

Chart 25: Financial Flows scenario

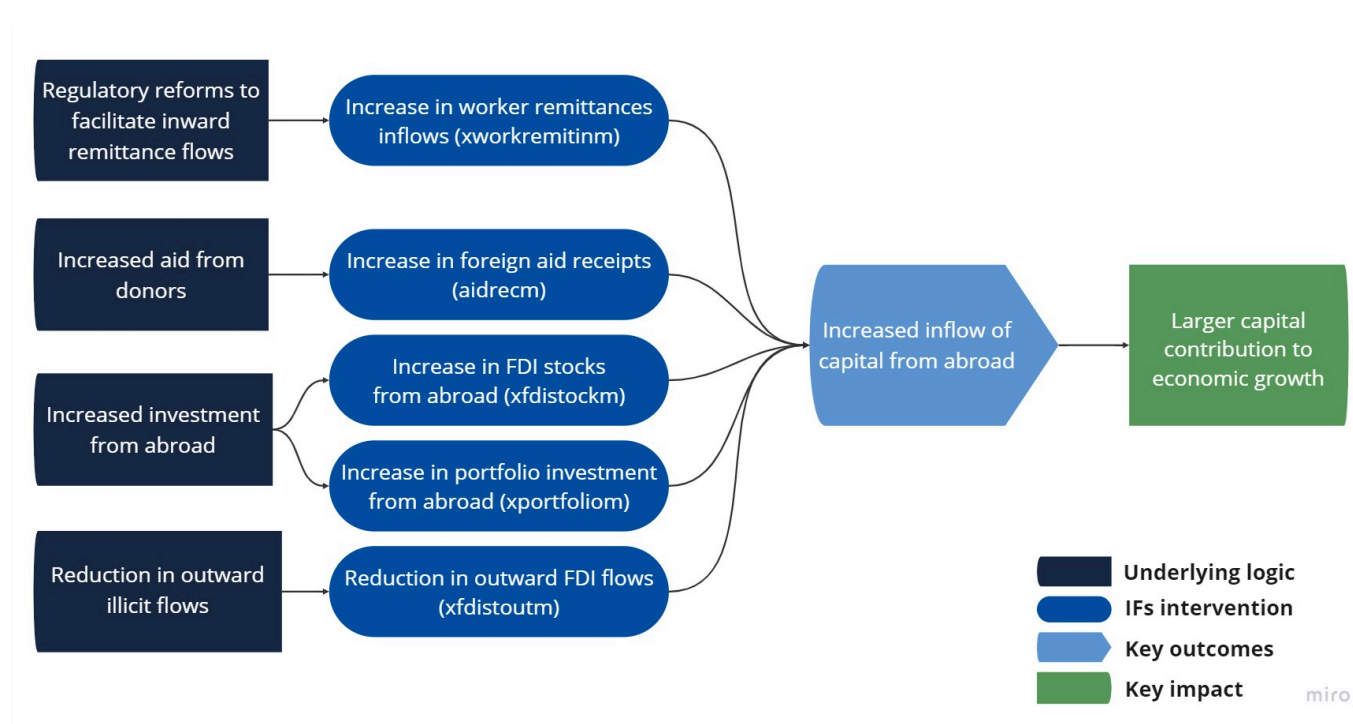


Chart 25 presents the structure of the Financial Flows scenario as modelled in IFs.

The Financial Flows scenario represents a reasonable but ambitious increase in inward flows of worker remittances, aid to poor countries and an increase in the stock of foreign direct investment (FDI) and additional portfolio investment inflows. We also reduce outward financial flows to emulate a reduction in illicit financial outflows.

Visit the theme on [Financial Flows](#) for our conceptualisation and details on the scenario structure and interventions. Chart 27 presents a summary chart that sets out the composition of the scenario.

Without data on illicit financial outflows, we reduce FDI outflows, using that as a proxy.

Many countries in sub-Saharan Africa are still heavily dependent on foreign aid to provide basic services like education and healthcare. This is the case for the DR Congo, despite its immense natural resources. Aid constituted about 5.4% of the country's GDP in 2021, which was below the average of nearly 7.2% of GDP of low-income African countries. In the Financial Flows scenario, foreign aid flows to the DR Congo as a percentage of GDP will increase to 4.3% of GDP by 2043—above the Current Path forecast of 3.9% and below the projected average of 5.1% of GDP for low-income African countries.

The conflicts of the 1990s effectively kept foreign investors away from the DR Congo. The government has recently implemented several policies and reforms to attract more FDI. The extractive sector accounts for most of the FDI flowing into the DR Congo, followed by the telecommunications sector. In 2021, FDI inflows represented 4.8% of the country's GDP, which was an increase of about 1.8% relative to 2020 (the COVID-19 pandemic year). This share was slightly above the average for low-income African countries, which was at 4.7% of GDP in 2021.

In the Financial Flows scenario, FDI inflows in 2043 will represent about 6% of GDP compared to 4.8% in the Current Path forecast. FDI can act as a catalyst for economic development as it brings much needed capital and technology to recipient countries. The Congolese government should continue its reforms to attract more FDI, especially manufacturing FDI.

Chart 26: Government revenue in Current Path and Financial Flows scenario, 2019-2043

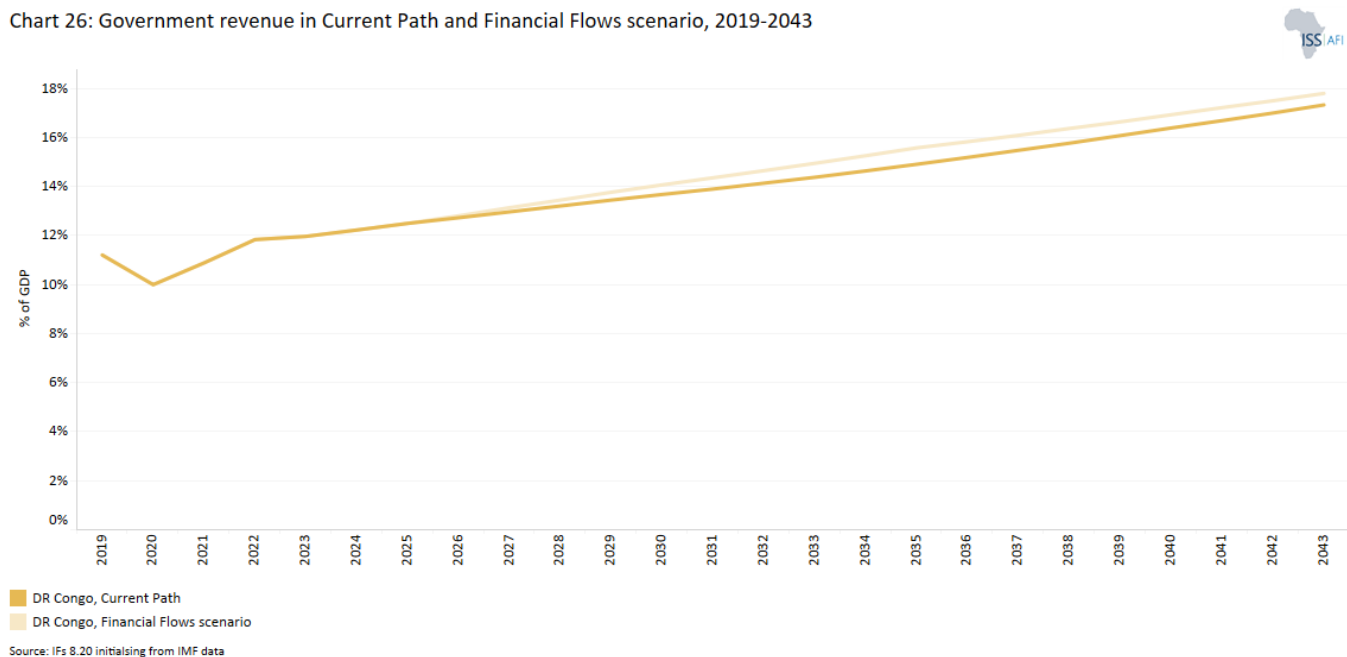


Chart 26 presents government revenues in the Current Path and Financial Flows scenario.

Wagner's law, or the law of increasing state activity, is the observation that public expenditure increases as national income rises. It is, therefore, reasonable to expect that government revenues will increase as a per cent of GDP in the Financial Flows scenario compared to the Current Path forecast.

Measured as a per cent of GDP, government revenue in the DR Congo stood at 12% of GDP (equivalent to US\$5.7 billion) in 2021. In the Current Path forecast, government revenue is projected to reach 17.4% (equivalent to US\$31.2 billion) of its GDP in 2043. In the Financial Flows scenario, however, government revenues will increase by nearly 0.6 percentage points of GDP to US\$33.6 billion (equivalent to 18% of GDP) in 2043. Much of the increase is due to foreign aid and the effect of more inward investment on growth.

## Governance scenario

Chart 27: Governance scenario

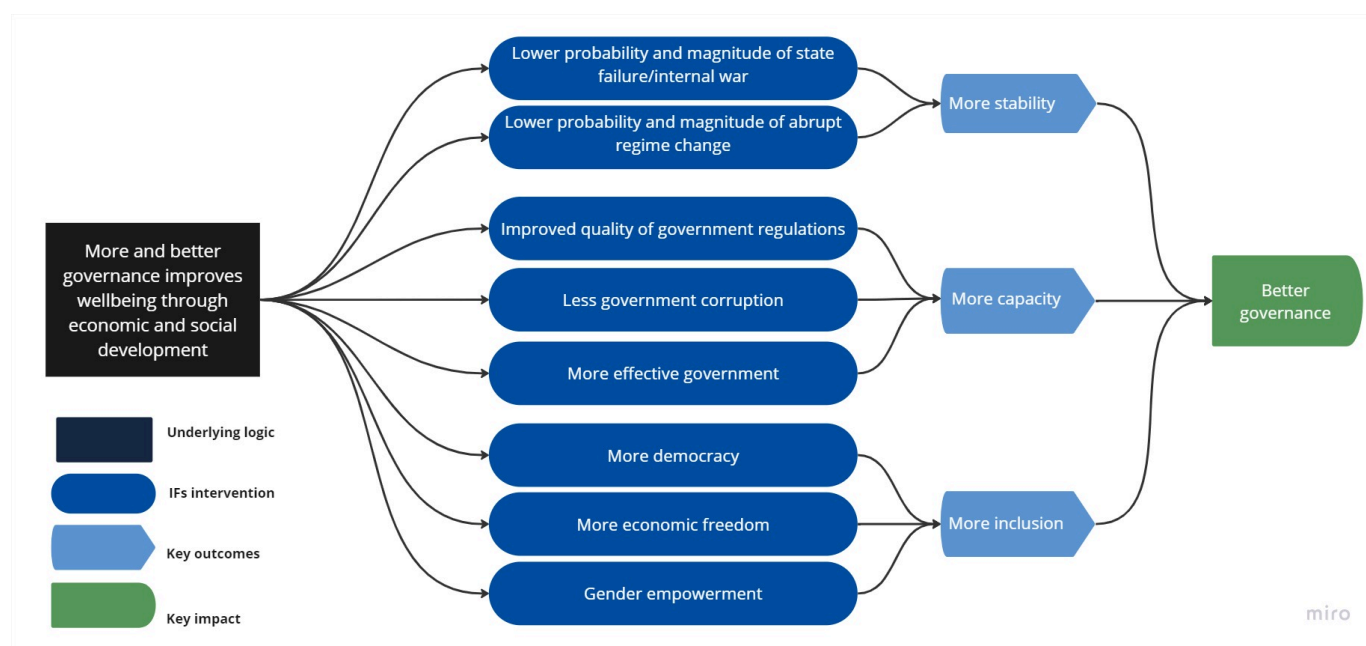


Chart 27 presents a summary chart that sets out the composition of the Governance scenario as modelled in IFs. Thinking of governance in terms of security, capacity and inclusion provides a useful lens to compare how countries progressed over time, as well as compare the state of governance between countries and groups of countries.

Visit the theme on [Governance](#) for a full conceptualisation and details on the scenario structure and interventions.

In brief, the stability dimension uses data from the Political Instability Task Force on:

- the probability and magnitude of state failure/internal war,
- the probability and magnitude of abrupt regime change, and
- social violence consisting of reductions in conflict and terror and police conflict.

Capacity is enhanced by improving the quality of government regulation, government effectiveness (both from the Worldwide Governance Indicators) and reductions in corruption using data from Transparency International.

Inclusion improves as a result of:

- an improvement in levels of democracy using the Polity IV index applied to those countries that evidence a democratic deficit,
- an improvement in gender empowerment using the gender empowerment measure (GEM) from the United Nations Development Programme (UNDP), and
- more economic freedom (using the associated index from the Fraser Institute).

These IFs indices compare well with the results from others, although IFs adopt a more structural/long-term approach. For example, the Worldwide Governance Indicators published by the World Bank measures six dimensions of governance, many of which overlap with the three IFs indices. These are: voice and accountability; political stability and absence of violence/terrorism; government effectiveness; regulatory quality; rule of law; and control of corruption.

As defined by the World Bank, government effectiveness ‘captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government’s commitment to such policies’.

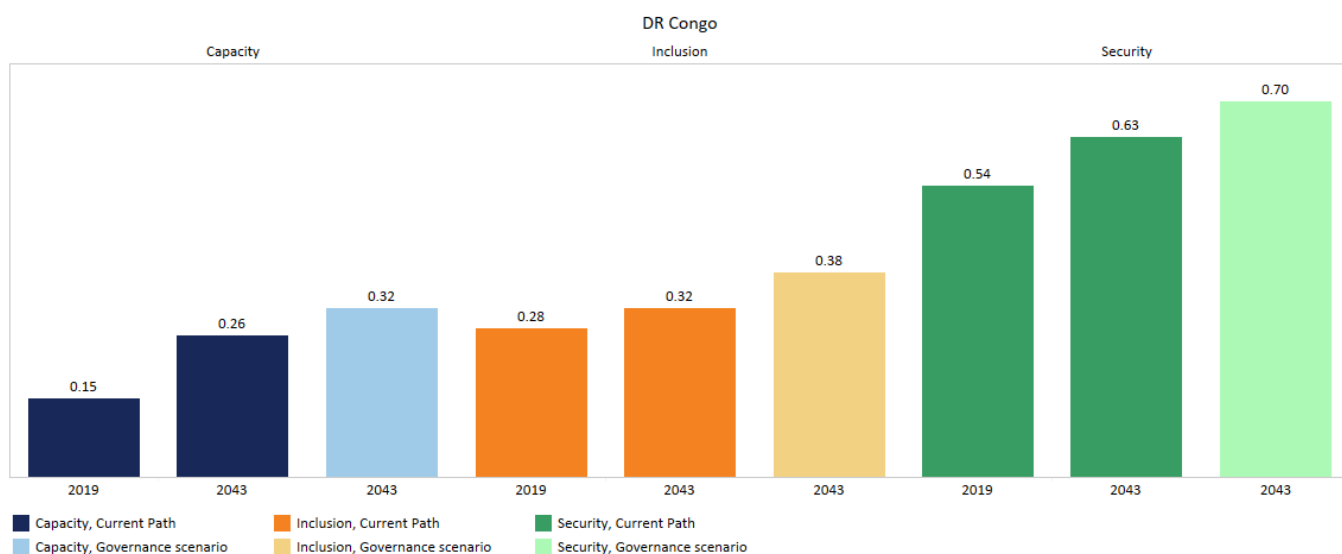
Governance in the DR Congo is characterised by networks of rent-seeking political, military and economic elites who direct and organise the abundant natural resources of the country to serve their ethnic and regional allegiances rather than for sustainable development. Corruption is endemic in the country, ranging from basic bureaucratic and administrative corruption to grand forms of corruption involving high-ranking members of the government and defence and security forces. The extractive (oil and mining) sector, tax and customs administrations, and the state-run enterprises are among the most affected.

Poor government effectiveness (average 0.9 between 2011 and 2021) and the absence of strong institutional and legal mechanisms to ensure accountability hamper economic progress in the DR Congo.

The capacity index within IFs indicates that the DR Congo had 26.7% less government capacity in 2021 than the average of low-income African countries. In the Current Path forecast, the DR Congo is projected to have 20.7% less capacity in 2043 than the average of its African peers. In the Governance scenario, the DR Congo will have 17.7% more capacity than the Current Path forecast in 2043, which will be just 6.6% less than its peers compared to a margin of 20.7% in the Current Path forecast.

The inclusion index with IFs indicates that the DR Congo had 34.4% less inclusion in 2021 than the average of low-income African countries. In the Current Path forecast, the DR Congo is projected to have 37.2% less inclusion in 2043 relative to its low-income African peers, whereas in the Governance scenario, the DR Congo will have 24.4% less inclusion relative to the estimated average for its peers.

Chart 28: Composite governance index in Current Path vs Governance scenario, 2019-2043



Source: IFs 8.20 initialising from WGI and TI data



Chart 28 presents progress with the three governance dimensions by 2043 in the Current Path and Governance scenario compared to 2019.

The composite IFs governance index is an average of the scores for security, capacity and inclusion. In 2021, the DR Congo was 23.8% below the average of low-income African countries, indicating that the DR Congo generally is more poorly governed than most low-income African countries. In the Current Path forecast, in 2043, the index will be 24.2% less than the average of its African peers. In the Governance scenario, the gap will be reduced to 12.2% relative to the estimated average of its low-income African peers in 2043.

## Scenario Comparisons

Chart 29: GDP per capita in Current Path and scenarios, 2019-2043

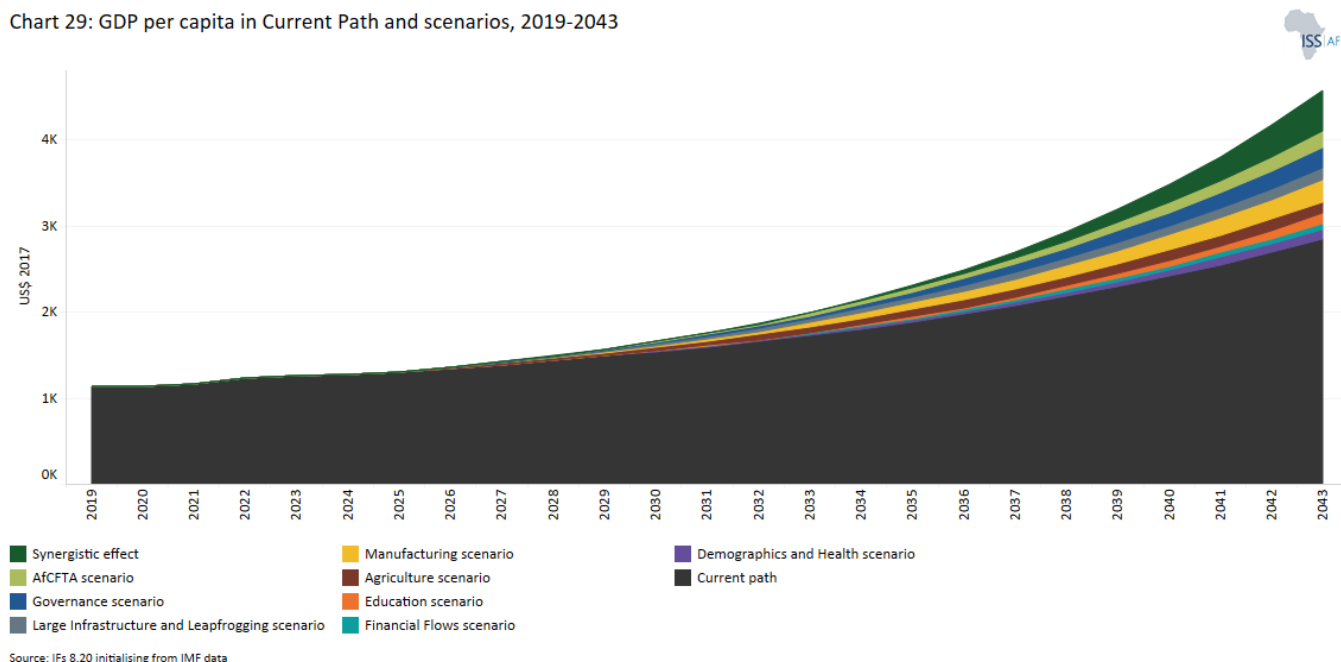


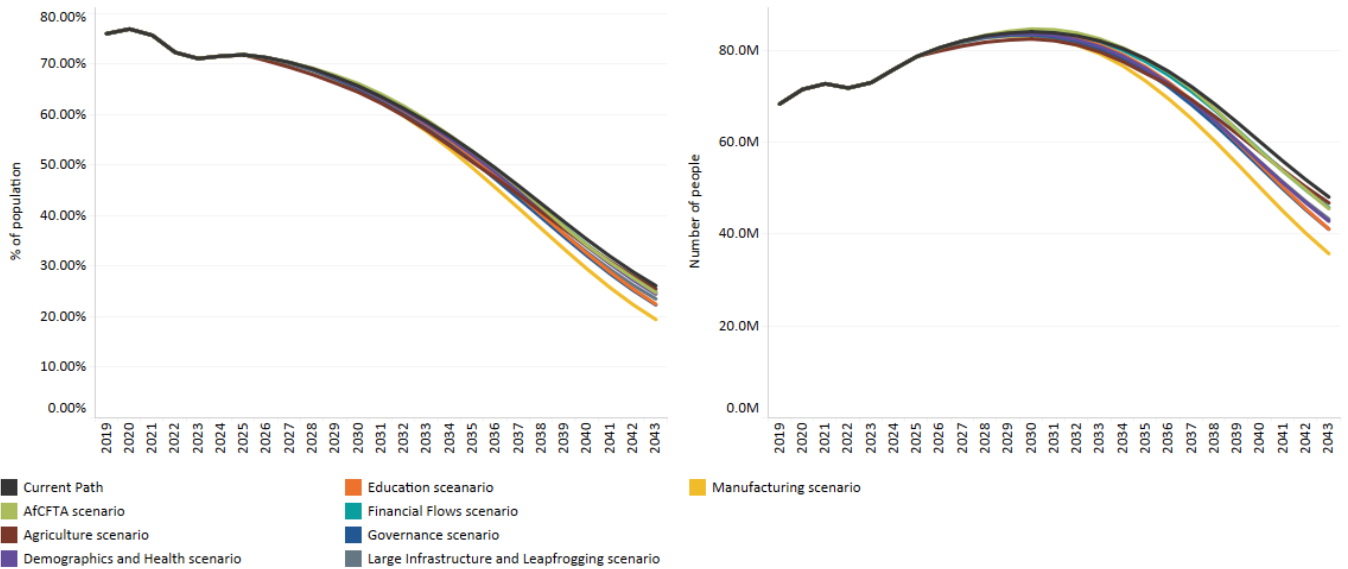
Chart 29 presents a stacked area graph on the contribution of each scenario to GDP per capita. The cumulative impact of better education, health, infrastructure, leapfrogging, etc. means an additional benefit in the integrated IFs forecasting platform that we refer to as the synergistic effect.

The synergistic effect of all the scenarios on the GDP per capita is US\$967.9 (equivalent to 49.1%) higher relative to the Current Path forecast of US\$1 971.8 in 2043.

Among the sectoral interventions, the AfCFTA scenario will have the greatest positive impact on the GDP per capita, taking it to US\$2 860.2. The second and third largest impact on GDP per capita will be achieved by the Manufacturing and Governance scenarios, followed by the Education scenario. In these scenarios, GDP per capita will increase to US\$2 169.1, US\$2 145.1 and US\$2 077.5, respectively.

The Combined Agenda 2063 scenario shows that a policy push across all the development sectors is necessary to achieve sustained growth and development in the DR Congo.

Chart 30: Poverty in Current Path and scenarios, 2019-2043



Source: IFS 8.20 initialising from UNPD population prospects estimate, WDI and PovcalNet data

Chart 30 presents the impact of each scenario on extreme poverty by 2043. The user can select the number of extremely poor people or per cent of the population.

The DR Congo is not on track to achieve the SDG goal of eliminating extreme poverty by 2030. In Current Path forecast, by 2030, 60.7% of the Congolese people (equivalent to about 72.6 million) will be living in extreme poverty using US\$1.90 at 2011 prices. The Combined Agenda 2063 scenario will reduce extreme poverty in the DR Congo to 57.8% of population—a reduction of 2.8 percentage points relative to the Current Path forecast in 2030.

In the Combined Agenda 2063 scenario, by 2043 the extreme poverty figure for the DR Congo will be reduced to 22.9% of the population (35.1 million people), about 31.7 million people fewer people (about 17.9% of population) relative to the Current Path forecast.

The Combined Agenda 2063 scenario will bring the DR Congo's extreme poverty below 3% of the population using US\$1.90 (2011 prices) in 2056. The Combined Agenda 2063 scenario shows that a concerted policy push across all the development sectors could significantly reduce poverty in the DR Congo.

Chart 31: GDP (MER) in Current Path and Combined Agenda 2063 scenario, 2019-2043

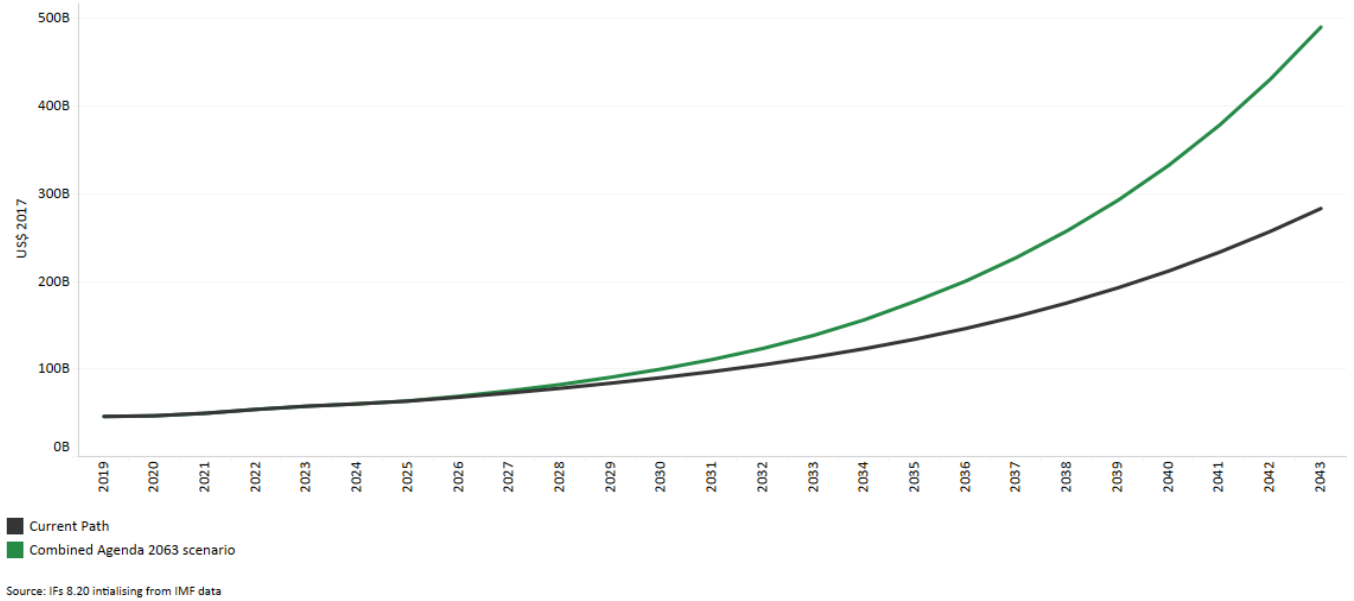


Chart 31 compares the size of the economy in the Current Path with the Combined Agenda 2063 scenario at market exchange rates (MER).

The Combined Agenda 2063 scenario consists of the combination of all eight sectoral scenarios, namely Governance, Demographics and Health, Education, Infrastructure/Leapfrogging, Agriculture, Manufacturing and Leapfrogging, AfCFTA and Financial Flows.

The Combined Agenda 2063 scenario dramatically impacts the expansion of the Congolese economy (GDP). In the Combined Agenda 2063 scenario, by 2043 the size of the economy is projected to expand to US\$302.4 billion compared to US\$179.2 in the Current Path forecast in the same year—a 68.7% increase relative to the Current Path forecast.

The Combined Agenda 2063 scenario shows the transformative power of a comprehensive policy push across all development sectors in achieving sustained growth in the DR Congo.

Chart 32: Value added by sector in Current Path and Combined Agenda 2063 scenario, 2019-2043

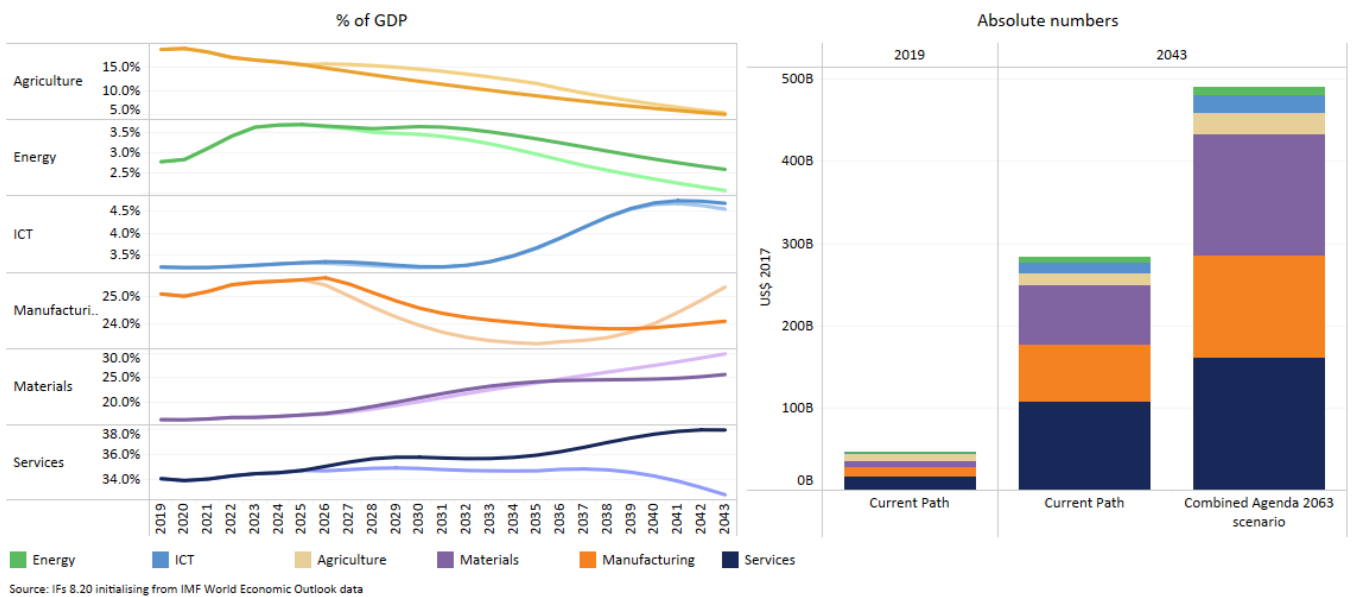


Chart 32 presents the change in the economy's structure, comparing the Current Path forecast with the Combined Agenda 2063 scenario from 2019 to 2043.

The IFs platform uses data from GTAP to classify economic activity into six sectors: agriculture, energy, materials (including mining), manufacturing, services and information and communication technologies (ICT). Most other sources use a threefold distinction between only agriculture, industry and services, with the result that data may differ.

In the Combined Agenda 2063 scenario, the manufacturing sector will experience a substantial increase in its contribution to the DR Congo's GDP relative to the Current Path forecast (7.5 percentage points larger in 2043). This will translate into an increase in GDP of US\$53.7 billion attributable only to the manufacturing sector in 2043 above the Current Path forecast.

Since the service sector is much larger than any other, it will contribute an additional US\$24.7 billion to GDP relative to the Current Path forecast in 2043. However, its contribution to GDP will decline from the 2043 Current Path forecast of 36.6% to 29.9% in the Combined Agenda 2063 scenario. The DR Congo's energy sector will continue to contribute the least in 2043. The Combined Agenda scenario will reduce the energy sector contribution to GDP from 2.7% (US\$4.9 billion) in the Current Path forecast to 2.2% (about US\$6.6 billion) in 2043.

Chart 33: Informal sector in Current Path and Combined Agenda 2063 scenario, 2019-2043

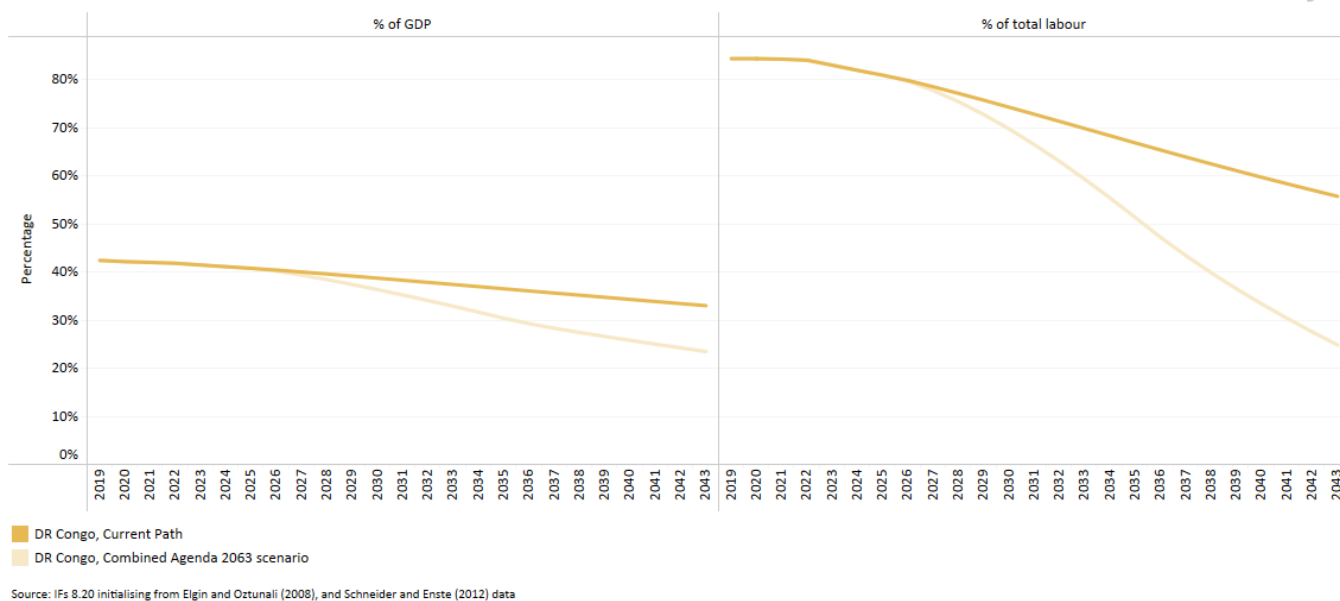


Chart 33 presents the size of the informal sector as a share of GDP and size of the informal labour force. Data on the contribution of the informal sector is often estimated and should be treated with care.

There are several definitions of an informal economy, but it is generally considered to be a set of economic activities that are not subject to taxation and other regulations. The informality rate in the DR Congo is one of the highest in the world. The size of the DR Congo’s informal sector was estimated at 42.6% of GDP in 2021—the largest among the low-income African countries and the third largest in sub-Saharan Africa after Zimbabwe (53.2%) and Tanzania (45.1%).

In the Current Path forecast, in 2043 the size of the informal sector will reduce to 34.5% of GDP (but increase in value to US\$61.9 billion). However, in the Combined Agenda 2063, the informal sector as percentage of GDP will be reduced to 25.6% (equivalent to US\$77.3 billion) in 2043. This is a reduction of 9 percentage points of GDP relative to the Current Path forecast.

Chart 34: Life expectancy in Current Path and Combined Agenda 2063 scenario, 2019-2043

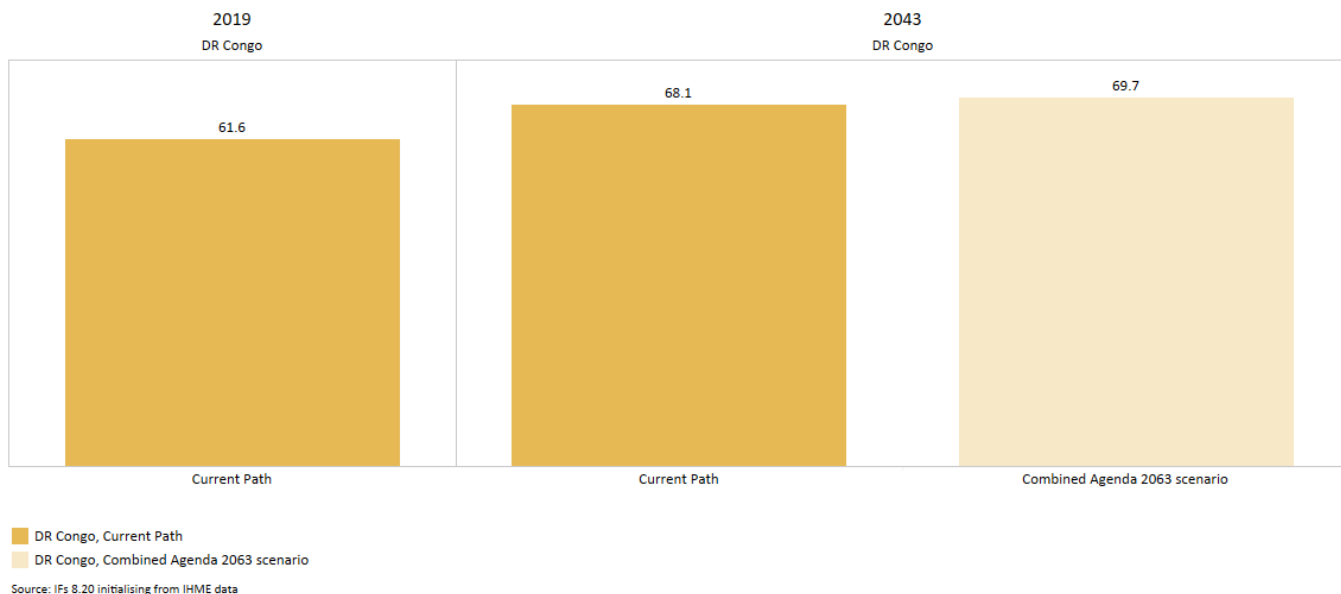


Chart 34 compares life expectancy in the Current Path forecast with the Combined Agenda 2063 scenario.

In 1960, the average female born in the DR Congo could expect to live 42.5 years, while the average male could expect to live 39.6 years. The average total life expectancy was 41.1 years. Since then, life expectancy in the DR Congo has improved by 21.3 years for females to 63.8 years and by 21.7 years for males to 61.3 years, and an average total of 62.6 years in 2021.

In 2021, life expectancy in the DR Congo was estimated at 62.6 years, which is more than a year below the average of low-income African countries. In the Current Path forecast, life expectancy in the DR Congo will improve to 67.6 years in 2043. In the Combined Agenda 2063 scenario, however, it is forecasted to improve to 69.2 years. This will be just 0.6 years below the average of low-income African countries, which is forecasted to be 69.8 years by 2043.

Chart 35: Domestic Gini in Current Path and the Combined Agenda 2063 scenario, 2019-2043

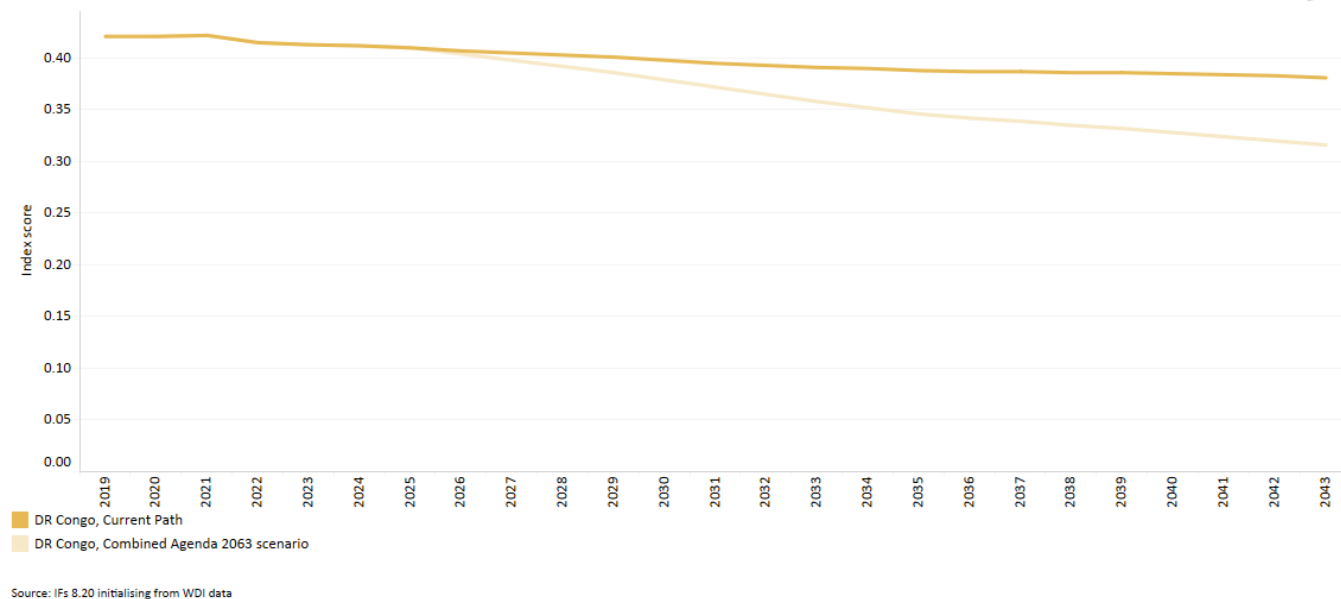


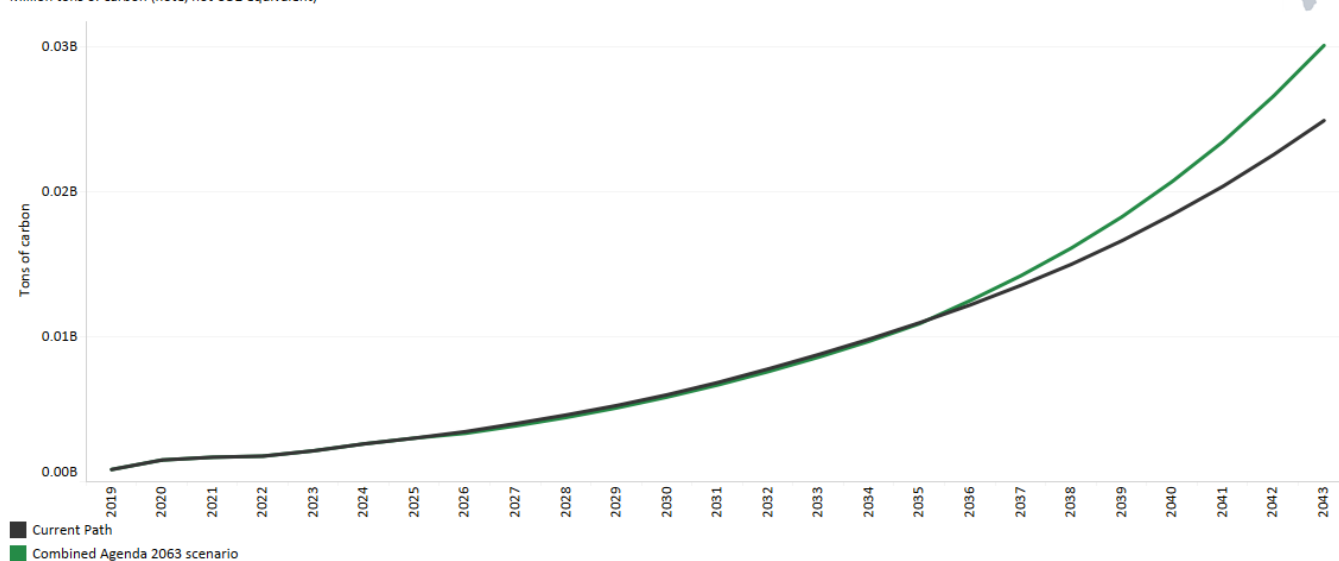
Chart 35 compares the Gini coefficient in the Current Path forecast with the Combined Agenda 2063 scenario.

Inequality in the DR Congo, using Gini coefficient index, is historically slightly higher than the average for low-income African countries and significantly higher than the average for Africa. Civil wars and general instability have exacerbated inequality across the DR Congo. In 2021, the DR Congo had a Gini index of 0.56—an increase from 0.42 in 2012.

In the Current Path forecast, inequality in the DR Congo using the Gini index is expected to decrease by 1.1% in 2043 relative to 2021. In comparison, the Combined Agenda 2063 scenario will reduce inequality in the DR Congo by 13.1% relative to the Current Path forecast to 0.48 in 2043.

Chart 36: Carbon emissions in Current Path and in Combined Agenda 2063 scenario, 2019-2043

Million tons of carbon (note, not CO<sub>2</sub> equivalent)



Source: IFs 8.20 Initialising from Carbon Dioxide Information Analysis Center data

Chart 36 compares carbon emissions in the Current Path forecast with the Combined Agenda 2063 scenario.

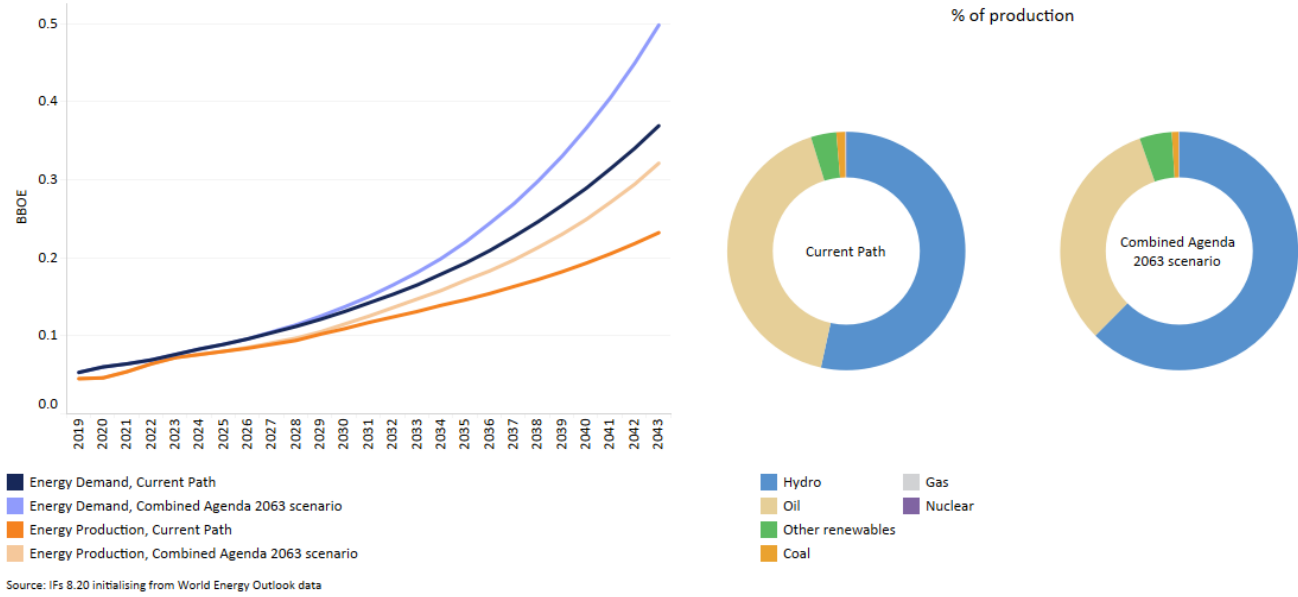
Since carbon dioxide (CO<sub>2</sub>), carbon monoxide (CO) and methane (CH<sub>4</sub>) have different molecular weights, IFs uses carbon. Many other sites and calculations use CO<sub>2</sub> equivalent.

The Combined Agenda 2063 scenario significantly impacts carbon emissions, albeit from a very low base, due to the increased economic activity it causes. In this scenario, the DR Congo's carbon emissions increase from about 2 million tons in 2021 to 21 million tons by 2043. This is a 950% increase over the period compared with 800% in the Current Path forecast over the same period. In 2043, the carbon emissions in the Combined Agenda 2063 scenario are about 16.7%, or 3 million tons, higher than in the Current Path forecast.

The materialisation of the Combined Agenda 2063 scenario would stimulate high economic growth and significantly reduce poverty in the DR Congo, but the cost in terms of environmental degradation is slightly higher. To mitigate the environmental impact of the Combined Agenda 2063 scenario, its implementation should be accompanied by concrete steps to accelerate the green energy transition.



Chart 37: Energy demand and production by type in Current Path and Combined Agenda 2063 scenario, 2019-2043



Source: IFS 8.20 initialising from World Energy Outlook data

Chart 37 compares energy demand and production in the Current Path forecast with the Combined Agenda 2063 scenario. Production is done in six types, namely oil, gas, coal, hydro, nuclear and other renewables. The data is converted into billion barrels of oil equivalent (BBOE) to allow for comparisons between different sources. Note that energy production could be for domestic use or export.

The DR Congo relies on imported hydrocarbon energy to meet its domestic energy demand. In 2021, the country's energy production was at about 53 million barrels of oil equivalent, creating unmet demand of about one million barrels of oil equivalent. On the Current Path, by 2043 the DR Congo's energy production is estimated to increase to 154 million barrels oil equivalent and unmet demand will increase to 98 million barrels oil equivalent. The Combined Agenda 2063 scenario will increase production to 202 million barrels oil equivalent. The contribution of renewable energy will increase from 50.5% (Current Path forecast) to 61.8% in 2043.

The positive shift towards sustainability, with the contribution of renewable energy, suggests a potential pathway for the DR Congo to enhance energy security and reduce dependency on imports by embracing renewable sources.

## Scenario interventions

Chart 38: Recommendations

All interventions start in 2024 and interpolate to 2033 after which they are maintained at that level, unless indicated otherwise.

Name	Description	Country or Group	Adjustments within IFs 7.84	Remarks
<b>Governance scenario</b>				
democm	Democracy	DR Congo	Interpolate to 1.2	Improves average democracy by 18.6% above Current Path forecast in 2043 but average in 2043 still lower than South America and South Asia.
econfreem	Economic freedom	DR Congo	To 1.12	Improves average economic freedom by 14.5% above Current Path forecast in 2043. Takes the DR Congo to above average of South Asia and South America in 2031.
govcorruptm	Government corruption	DR Congo	To 1.15	Improves government transparency by 26% above Current Path forecast in 2043. Average takes Africa to above South Asia in 2028 but remains below South America.
goveffectm	Government	DR Congo	To 1.15	Improves

	effectiveness (quality)			government effectiveness 21.2% above Current Path forecast in 2043. Gets to average of South Asia in 2033 still below averages of South America in 2043
govregqualm	Government regulatory quality	DR Congo	To 1.15	Improves average regulatory quality by 24.2% above Current Path in 2043. Takes Africa to above South Asia in 2029 and to the average of South America in 2043.
sfintlwaradd	State failure/internal war probability (sfintlwaradd)	DR Congo	To -0.4	Improves IFs government security index. Africa still below average of South Asia and South America.
sfintwarmagm	State failure through instability – magnitude, multiplier (sfintwarmagm)	DR Congo	To 0.8	Improves IFs government security index. Africa still below average for South Asia and South America.
<b>Demographics and Health scenario</b>				
contrusm	Contraception use multiplier (contrusm)	DR Congo	To 1.35	Contraceptive use for DR Congo increases by 16.3 percentage points above Current Path in 2043. Instead of gap of 47.9 percentage points with South America (2019), gap closes to 20 points in 2043

watsafem (OthImproved)	Percentage of people with access to other improved safe water (watsafem othimproved)	DR Congo	To 1.2	In place of reduction in unimproved that is used for other countries.
Sanitation (Improved)	Per cent of population with access to improved sanitation	DR Congo	To 1.5	In place of reduction in unimproved that is used for other countries.
malmortatiom	Maternal mortality ratio multiplier	DR Congo	To 0.73	Rates in DR Congo is less than for other comparable contries. The intervention moves DR Congo closer to South America. In 2019 maternal mortality was 50.4/100 000 live births in DR Congo compared to 13.8 in South America and 34.7 in South Asia. By 2043 DR Congo gets to 19.3 in the scenario instead of 27.1 in the Current Path forecast.
hlmortcdchldm	Communicable disease mortality multiplier for children under five	DR Congo	To 0.72	Rates in DR Congo are much higher than for other comparable countries/regions. The intervention moves DR Congo closer to South America
hlmortm (AIDS)	Mortality multiplier	DR Congo	To 0.6	DR Congo has one of the highest AIDS mortality rates globally.
hlmortm (malaria)	Mortality multiplier	DR Congo	To 0.5	DR Congo has one of the highest malaria

				mortality globally. In 2019 it is 0.488/1 000. On the Current Path it declines to 0.192 in 2043. In the scenario it declines to 0.08
hlmortm (OthCommumDis)	Mortality multiplier	DR Congo	To 0.9	Intervention on mortality rates from other communicable diseases are applied to DR Congo with a higher burden and with slow decline over the forecast horizon.
<b>Education scenario</b>				
edseclorvocadd	Lower secondary, vocational share, additive factor, decimal rate	DR Congo	To 4.7 (male) To 4 (female)	
edsecuprvocadd	Upper secondary, vocational share, additive factor, decimal rate	DR Congo	To 5 (male) To 8 (female)	
edtersciencshradd	Tertiary, sci-eng share of graduates, additive factor, decimal rate	DR Congo	To 5	
edpriintnm	Primary net intake rate multiplier (total)	DR Congo	To 1.12 (male) To 1.22 (female)	
edprigndreqintn	Primary gender particy time for intake, years			

edprisum	Primary, survival rate, multiplier (total)	DR Congo	To 1.22 (male) To 1.12 (female)	
edseclowrtranm	Lower secondary transition rate multiplier	DR Congo	To 1.1 (male and female)	
edseclowrgndreqtran	Lower secondary gender parity time for transition, years			
edsecupprtranm	Upper secondary transition rate multiplier	DR Congo	To 1.1 (male and female)	
edsecupprgndreqtran	Upper secondary gender parity time for transition, years			
edseclowrgram	Lower, secondary, graduation rate, multiplier	DR Congo	To 1.21 (male) To 1.36 (female)	
edsecupprgram	Upper secondary, graduation rate, multiplier (total)	DR Congo	To 1.2 (male) To 1.35 (female)	
edterintm	Tertiary, intake rate, multiplier, total	DR Congo	To 1.22 (male) To 1.2 (female)	
edtergndreqint	Tertiary, gender parity time for intake, years			
edtergradm	Tertiary, graduation rate multiplier	DR Congo	To 1.6 (male) To 1.3 (female)	
jedqualpriallm	Quality, multiplier on primary (total)	DR Congo	To 1.2	

edqualsecallm	Quality, multiplier on secondary (total)	DR Congo	To 1.2	
<b>Agriculture scenario</b>				
ylm	Yields multiplier	DR Congo	To 1.5	
landirareaactualm	Multiplier on land actually irrigated			
landirareaequipm	Multiplier on land equipped for irrigation	DR Congo	To 1.2	
aglossprodm	Loss rate of agricultural production (crop)	DR Congo	To 0.85	
aglosstransm	Loss rate of agriculture as moves from producer to consumer multiplier	DR Congo	To 0.85	
clpcm	Per capita calorie demand multiplier	DR Congo	To 1.1	
forestm	Increased forest protection	DR Congo	To 1.01	
waterwithdrawalm	Groundwater withdrawal (cubic km)	DR Congo	To 1.03	
infraroudraitrgtval	Road access target, fixed value percent	DR Congo	To 95	
infraroundraitgtyr	Road access target, years to reach	DR Congo	To 40	
<b>Manufacturing scenario</b>				

govhhtrnwelm (unskilled)	Government to household welfare transfers	DR Congo	To 1.5	
hhtaxrm	Household tax rate multiplier, by skill level			
govbusregindm	Government regulation of business index multiplier?/	DR Congo	To 0.85	
isdm	Investment in manufacturing sector	DR Congo	To 1.05	
randdexpm	Increase research development activities (total)	DR Congo	To 1.5	
labparm	Total labour participation rate (male & female), female more aggressive	DR Congo	To 1.01 (male) To 1.03 (female)	
<b>Large Infrastructure/Leapfrogging scenario</b>				
qem - Q (OthRenew)	Capital cost to output ratio in energy	DR Congo	To 0.8	
enpm (OthRenew)	Energy production multiplier for other renewables	DR Congo	To 1.2	
infraelecaccm (urban)	Electricity access multiplier urban	DR Congo	To 1.04	
infraelecaccm (rural)	Electricity access multiplier rural	DR Congo	To 1.27	
ictbroadmobilm	ICT mobile	DR Congo	To 3	



	broadband multiplier			
ictbroadcostm	ICT broadband multiplier on cost of adding a connection	DR Congo	To 0.8	
ictbroadm	ICT broadband multiplier	DR Congo	To 1.5	
Infrroadpavedpcntm	Paved road	DR Congo	To 1.2	
gdpinformshrm	Informal sector	DR Congo	To 0.95	
<b>AfCFTA scenario</b>				
mfpadd	Multifactor productivity growth additive factor	DR Congo	To 0.007	Calculations or adjustments were based on annual average growth rates for the period 2010–2018, using the Penn World Tables data – TFP at current PPPs (US=1)
XSM	Export multiplier – Manufacturing	DR Congo	To 1.22	Note: Economic freedom is now part of Governance and not part of the AfCFTA scenario
XSM	Export multiplier – Agriculture	DR Congo	To 1.22	
XSM	Export multiplier – Services	DR Congo	To 1.2	
XSM	Export multiplier – ICT	DR Congo	To 1.1	

XSM	Export multiplier – Materials	DR Congo	To 1.1	
XSM	Export multiplier – Energy	DR Congo	To 1.05	
xshift	Export shift as a result of promotion of exports (Manufactures) ratio	DR Congo	To 0.008	<p>In the <a href="#">World Bank policy research paper</a> , export promotion agencies for developing countries will have an elasticity of 8%.</p> <p>In the <a href="#">World Economy paper</a>, each additional export promotion agency increases exports by 6–10%.</p>
mtariffaxrm	Import tariff tax multiplier by country and sector: Agriculture	DR Congo	LDC: Interpolate from 1 in 2029 to 0.1 in 2042 (13 years)	<p>Under the AfCFTA, agriculture products are under sensitive products, have a fixed 10% tariff.</p> <p>(See for example, <a href="#">tralac, African Continental Free Trade Agreement.</a>)</p>
	Materials	DR Congo	LDC: Interpolate from 1 in 2023 to 0.01 in 2033 (10 years)	<p>Non-sensitive products have a 100% tariff reduction under the AfCFTA.</p>
	Energy, Service, and ICT sector	DR Congo	LDC: Interpolate from 1 in 2023 to 0 in 2033 (10 years)	<p>Only a few products are under the 3% of the excluded products, for example, corrugated flat-rolled steel.</p>

	Manufacturing sector	DR Congo	LDC: Interpolate from 1 in 2023 to 0.05 in 2033 (10 years)	Few manufactured products are under sensitive and excluded products.
<b>Financial Flows scenario</b>				
xworkremitinm	Worker remittances multiplier (positive numbers are receipts)	DR Congo	To 1.1	
aidrecm	Aid (foreign) receipts multiplier	DR Congo	To 1.15	We need to increase the provision of aid from OECD countries and FDI outflows from there and China.
xfdistockm	Foreign direct investment, stocks of investment from abroad, multiplier	DR Congo	To 1.08	
xfdistoutm	Foreign direct investment, stocks of outward investment, multiplier	DR Congo	To 0.8	
xportfoliom	Portfolio investment, stocks of investment from abroad, multiplier	DR Congo	To 1.5	

<b>Combined Agenda 2063 scenario</b>
Combination of all the above

The adjustment made to the project data file is listed below:

IFs Data series	Updated years	Source used for update
GDP growth rate, exogenous target (percent) (gdprext)	2017–2024	IMF World Economic Outlook April 2023
Labour force size (SeriesLabor)	2017–2022	World Development Indicators
Population (SeriesPopulation)	2017–2022	World Development Indicators
Population of young people (<15), Headcount (SeriesPopulationUnder15Mill)	2017–2022	World Development Indicators
Population Ages 15-64, per cent of total population (SeriesPopulation15to64%)	2017–2022	World Development Indicators
Total fertility rate: Children per woman (SeriesTFR)	2017–2021	World Development Indicators
Infant mortality rate (SeriesInfMortRateIHME)	2017–2021	World Development Indicators
Level of corruption (SeriesCorruption)		
Economic freedom level on scale of 1 to 10 (most free) (SeriesFreedomEcon)	2018–2020	Fraser Institute

Civil and political freedom level (SeriesFreedom)	2021–2023	Freedom House
Government expense as per cent of GDP (SeriesGovExpense%GDP)	2011–2018	
Central government debt as per cent of GDP (SeriesGovtDebt%GDP)	1998–2019	
Meat production (SeriesAgProdMeat)	2015–2021	Food and Agriculture Organization of the United Nations (FAOSTAT)
Production of cereals (SeriesAgProdCereals)	2015–2021	Food and Agriculture Organization of the United Nations (FAOSTAT)
Value added in manufacturing as per cent of GDP (SeriesVaddMan%)	2018–2021	World Development Indicators (WDIs)
Value added in agriculture as per cent of GDP	2018–2021	WDIs
Value added in industry as per cent of GDP (SeriesVaddInd%)	2018–2021	WDIs
Value added in services as per cent of GDP (SeriesVaddSer%)	2018–2021	WDIs
Number of households		
Size of informal sector as per cent of GDP (SeriesGDPInformal%Blended)	2009–2018	World Bank
Labour force size (SeriesLabor)	2017–2022	WDIs
Size of informal labour force per cent of total		
Agricultural land area (SeriesLandAgri)	2009–2021	Food and Agriculture Organization of the United Nations (FAOSTAT)

Area equipped for irrigation (total: 1 000 ha) (SeriesLandIrAreaEquip)	1996–2021	Food and Agriculture Organization of the United Nations (FAOSTAT)
Labour participation rate, female (SeriesLaborParRate15PlusFemale%)	2013–2023	International Labour Organization Statistics (ILOSTAT)
Labour participation rate, male (SeriesLaborParRate15PlusMale%)	2013–2023	International Labour Organization Statistics (ILOSTAT)
Labour participation rate, total (SeriesLaborParRate15PlusTotal%)	2013–2023	International Labour Organization Statistics (ILOSTAT)
Gini index (SeriesGiniExtended)	2010–2020	UNU Wider

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Dr **Blessing Chipanda** joined the African Futures and Innovation (AFI) programme in January 2023. Before joining the ISS he worked as an assistant lecturer/ research assistant at the University of Pretoria, Department of Economics. He is particularly interested in tasks within the wider realm of international trade, development economics, public policy, monetary policy, and econometric modelling. Equally interested in economic and socio-economic activities that impact social welfare. Blessing has a PhD in economics from the University of Pretoria, South Africa.

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