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CEN-SAD

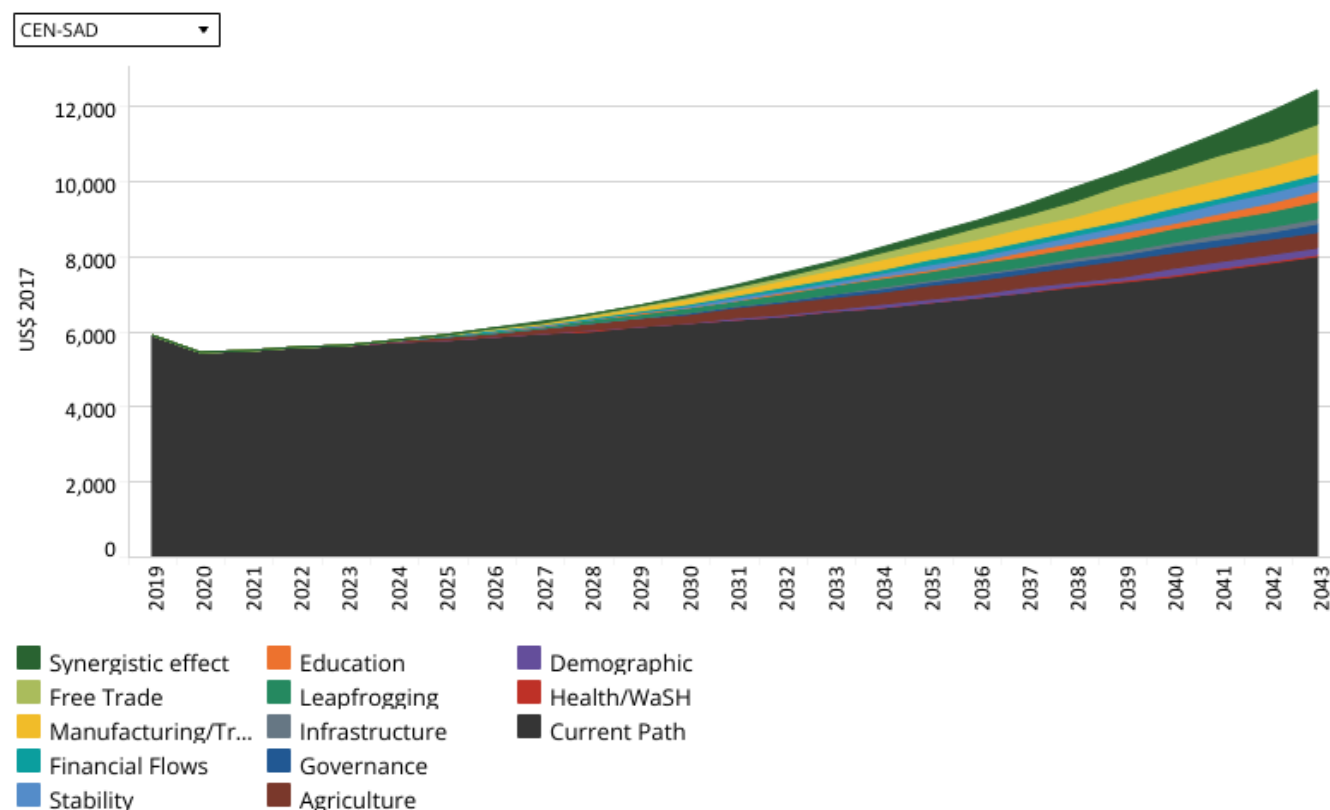
Combined Agenda 2063 scenario

Du Toit McLachlan

Last updated 13 December 2023 using IFs v7.63

Chart 55: GDP per capita in CP and scenarios, 2019–2043

Additional GDP per capita per scenario, purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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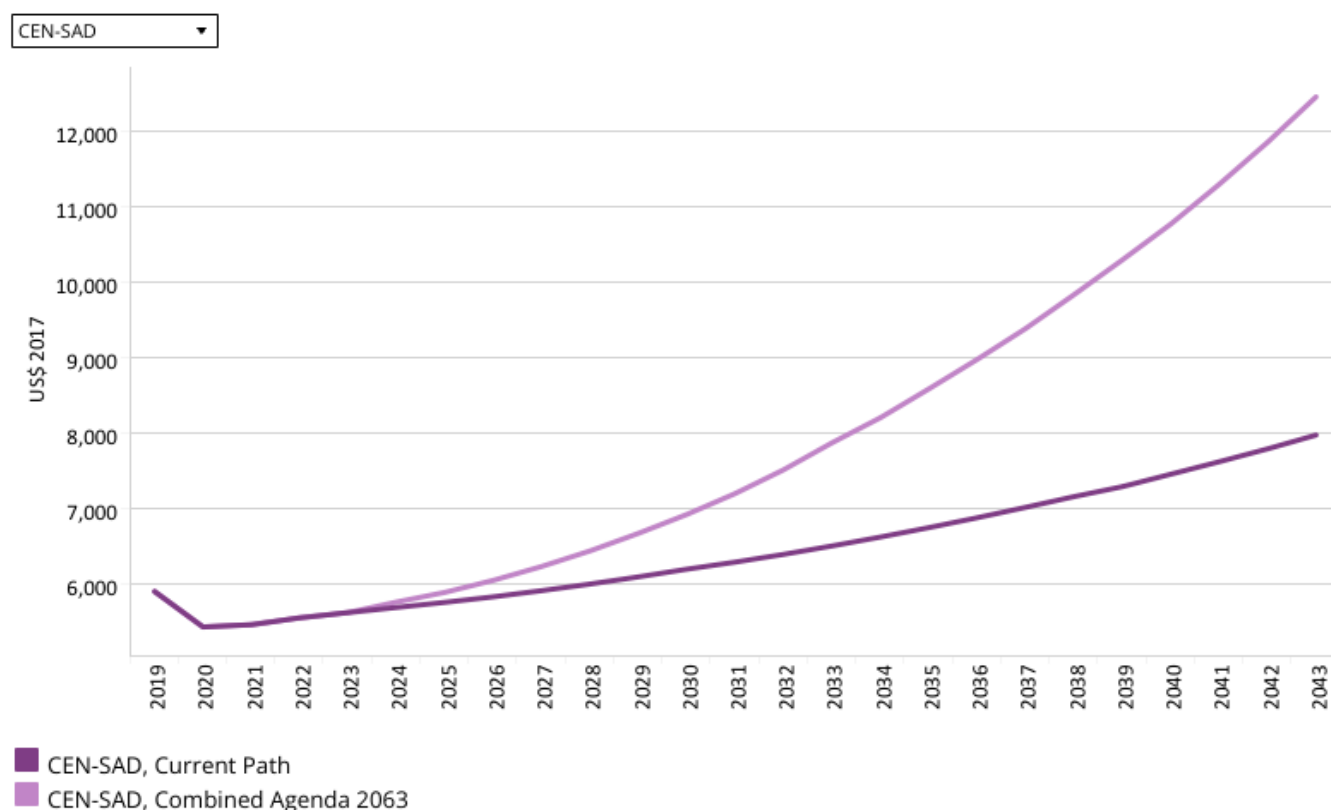
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The Combined Agenda 2063 scenario consists of the combination of all 11 sectoral scenarios presented above, namely the Stability, Demographic, Health/WaSH, Agriculture, Education, Manufacturing/Transfers, Leapfrogging, Free Trade, Financial Flows, Infrastructure and Governance scenarios. The cumulative impact of better education, health, infrastructure, etc. means that countries get an additional benefit in the integrated IFs forecasting platform that we refer to as the synergistic effect. Chart 55 presents the contribution of each of these 12 components to GDP per capita in the Combined Agenda 2063 scenario as a stacked area graph.

The Free Trade scenario is projected to have the largest positive impact on CEN-SAD's GDP per capita. The scenario would add US\$791 to the regional economic community's (REC) Current Path forecast for 2043, followed by the Manufacturing/Transfers increase of US\$548 and the Leapfrogging scenario increase of US\$444. The synergistic effect of implementing all 11 scenario's interventions simultaneously is US\$923, highlighting the importance of a holistic approach to development.

Individually, CEN-SAD's members mostly follow the same pattern, with the Free Trade scenario leading to the largest percentage increases for most countries. The Agriculture scenario provides the biggest increase for nine countries, Togo, Mauritania, Guinea-Bissau, Burkina Faso, Chad, Liberia, Sierra Leone, Niger and the Central African Republic (CAR), while the Leapfrogging scenario raises Somalia's and Mali's GDP per capita the most. Egypt's highest increase comes from the Manufacturing/Transfers scenario, the only country to do so.

Chart 56: GDP per capita in CP and Combined scenario, 2019–2043
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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Whereas [Chart 55](#) presents a stacked area graph on the contribution of each scenario to GDP per capita as well as the additional benefit or synergistic effect, Chart 56 presents only the GDP per capita in the Current Path forecast and the Combined Agenda 2063 scenario.

The Combined Agenda 2063 scenario which combines all the 11 scenario interventions will have a dramatic impact on GDP per capita for CEN-SAD. In the Combined Agenda 2063 scenario, it is assumed that the Governments of CEN-SAD member countries make a concerted effort to remove the binding constraints to growth and development. In 2043, the CEN-SAD's GDP per capita is projected to be US\$4 470 higher than the Current Path forecast — an increase of 56%.

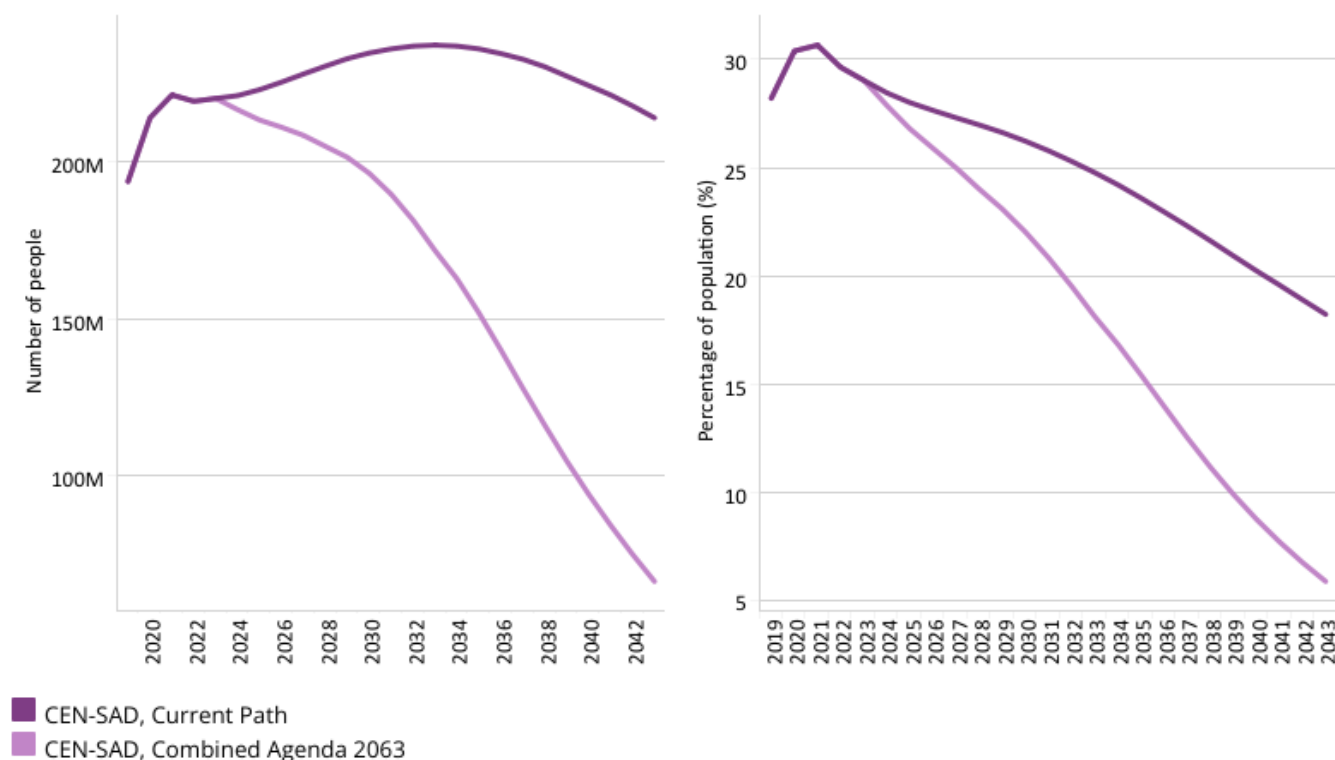
CEN-SAD's members will make remarkable progress in catching up with Africa's Current Path forecast average GDP per capita for 2043: ten members, Guinea-Bissau, Senegal, Côte d'Ivoire, Benin, Kenya, The Gambia, Comoros, Sudan, Mauritania, Ghana and Djibouti, will all have a higher GDP per capita than Africa's US\$7 157 in 2043 in the Combined Agenda 2063 scenario, where they would not have done in the Current Path forecast. Guinea-Bissau does particularly well, nearly doubling its Current Path forecast to reach US\$7 867 in 2043.

Chart 57: Poverty in CP and Combined scenario, 2019–2043

Millions of people and % of total population



CEN-SAD \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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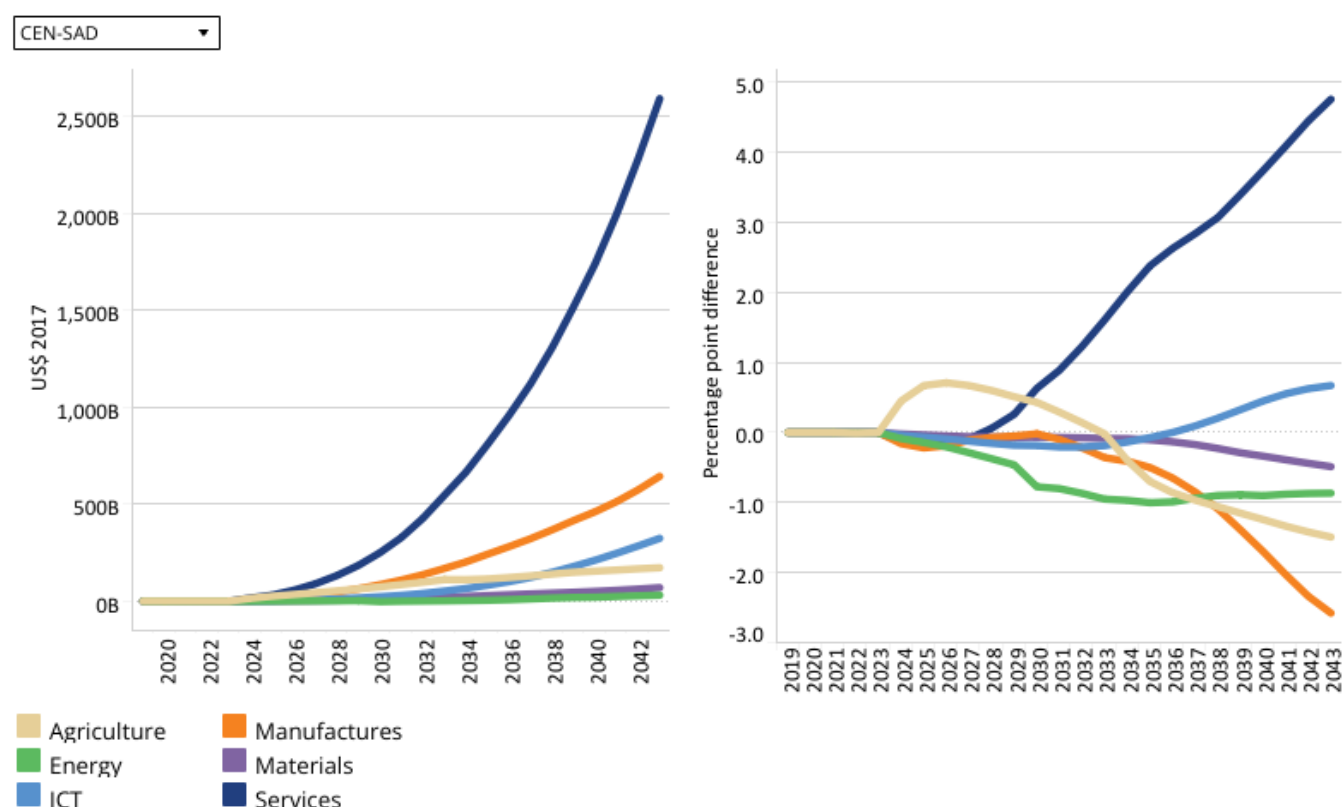
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The Combined Agenda 2063 scenario's full implementation would enable CEN-SAD to dramatically reduce poverty. The poverty rate in the Combined Agenda 2063 scenario is 5.9% in 2043, 12.3 percentage points below the Current Path forecast of 18.2% for the same year. The reduction would equate to 147.9 million fewer people being extremely poor at the US\$1.90 poverty line in 2043 compared to the Current Path forecast.

Individually, there are wide discrepancies in how effective the Combined Agenda 2063 scenario will be, with Sierra Leone expected to see a 32 percentage point reduction in its poverty rate for 2043, while Tunisia and Morocco, countries where poverty is already low, see reductions below 5 percentage points.

CAR's poverty rate will remain stubbornly high at 43% in 2043, despite a 25 percentage point reduction compared to the Current Path forecast. Three other countries, Nigeria, São Tomé and Príncipe and Benin, will still have poverty rates above 30%, in spite of reductions above 20 percentage points. The continued struggle to alleviate poverty in these countries, in spite of the Combined Agenda 2063 scenario's extensive interventions, highlights how poverty is ingrained in these countries and the scale of the challenge they face. Other CEN-SAD members fare better however, as six countries (Eritrea, Guinea, Niger, Sudan, Morocco and Tunisia) will eliminate extreme poverty by 2043 due to the Combined Agenda 2063 scenario's interventions.

Chart 58: Value added by sector in CP and Combined scenario, 2019–2043
Absolute and % point difference GDP

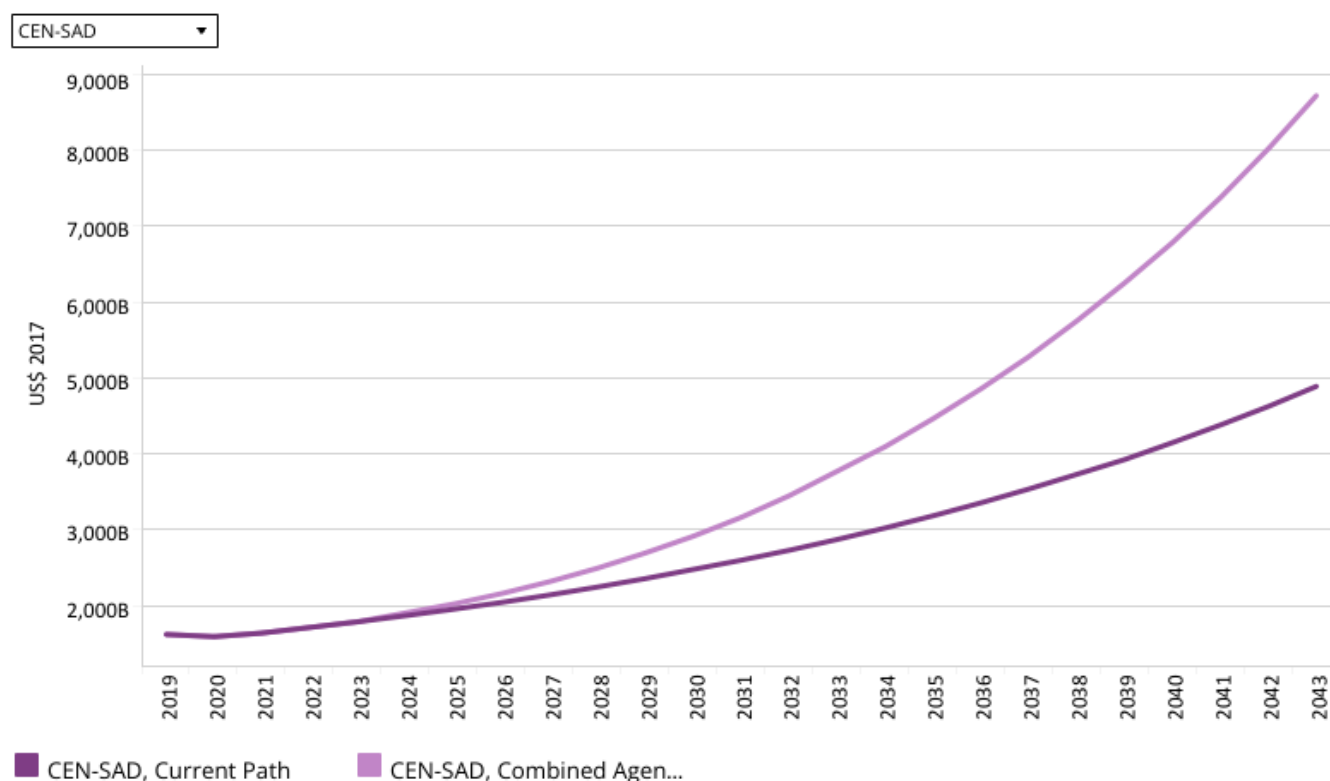


See [Chart 8](#) to view the Current Path forecast of the sectoral composition of the economy.

The service sector will grow significantly in the Combined Agenda 2063 scenario compared to the Current Path forecast: by 2043, CEN-SAD's services will add an additional 4.8 percentage points in value added over the Current Path figure of 56.8%. The share of manufacturing in GDP in contrast will shrink by 2.6 percentage points compared to the Current Path forecast for 2043, but both will increase in terms of absolute values. Services will add an extra US\$2.6 trillion, while manufacturing is projected to add US\$643.1 billion over its Current Path forecast; ICT will grow by US\$323.7 billion.

Djibouti, Burkina Faso and Guinea-Bissau are the only countries who do not follow this trend; the value added by services as a proportion of GDP declines by 6.7, 2.1 and 1 percentage point, respectively, in 2043. Eritrea on the other hand pivots sharply towards services, which adds an additional 11.5 percentage points of total value added, while its manufacturing sector shrinks by 11.3 percentage points in 2043. Djibouti and Liberia in contrast will see their manufacturing sectors add 7.7 and 6.7 percentage points, respectively, more to total value added in Combined Agenda 2063 scenario by 2043.

Chart 59: GDP in CP and Combined scenario, 2019–2043
Billions US\$ 2017, market exchange rates



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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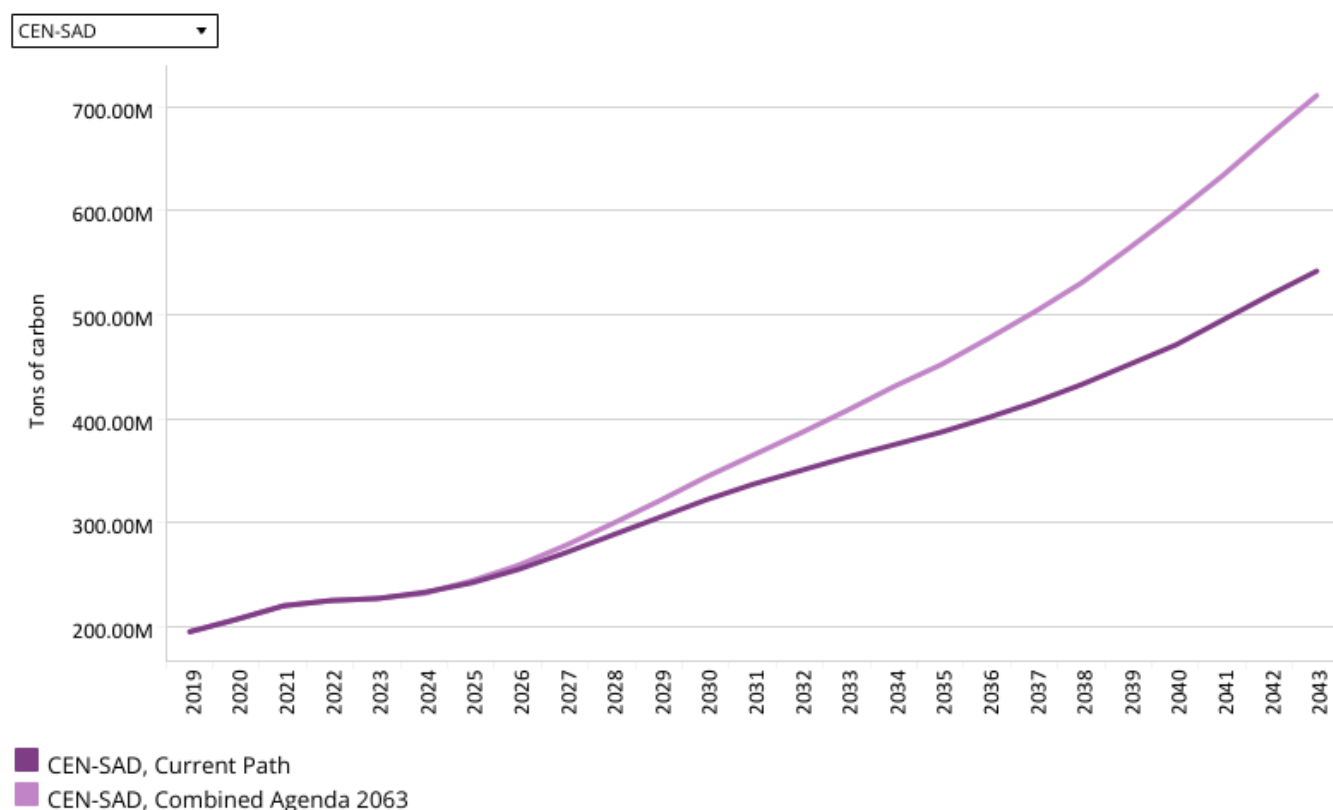
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The effect of the Combined Agenda 2063 scenario on the CEN-SAD GDP is impressive. In 2043, the size of the CEN-SAD economy is forecast to grow to US\$8.7 trillion by 2043 — 78.3% higher than the Current Path forecast.

Guinea-Bissau, CEN-SAD's third smallest economy in 2019, is projected to see the biggest increase in 2043 compared to the Current Path forecast, growing by 123% to reach US\$16.4 billion. Nigeria is also expected to benefit greatly from the Combined Agenda 2063 scenario: the economy is expected to grow by 91.7% in 2043 compared to the Current Path forecast. The Nigerian economy will also constitute 43.4% of CEN-SAD's combined GDP, 3.1 percentage points more than in the Current Path forecast.

Chart 60: Carbon emissions in CP and Combined scenario, 2019–2043

Million tons of carbon (note, not CO₂ equivalent)



Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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The Combined Agenda 2063 scenario is projected to significantly increase economic activity for CEN-SAD, which in turn will lead to an increase in the amount of carbon the REC emits. In 2043, CEN-SAD is expected to emit 711 million tons of carbon in the Combined Agenda 2063 scenario, an increase of 31.2% compared to the Current Path forecast. The need for development is great but must be balanced against environmental concerns.

The economies of Nigeria and Egypt are forecast to undergo sizable expansions in the Combined Agenda 2063 scenario, meaning their total carbon emissions will jump significantly too. In 2043, Nigeria will emit 288.7 million tons of carbon, 45.8% more than in the Current Path forecast, while Egypt will emit 176.5 million tons, a smaller rise of 17.7%. The same relationship between GDP growth and an increase in carbon emissions holds for most of CEN-SAD's members, with a few exceptions: Ghana is projected to see a 68.9% increase in GDP but only a 5.7% increase in carbon emissions in 2043. Chad, on the other hand, will see a 104% increase in GDP, but must manage a 71.9% increase in carbon emissions.

It is important to note that the total carbon emissions, as a percentage of Africa and the world's carbon emissions, is still small; however, the implementation of the Combined Agenda 2063 scenario, should be accompanied by concrete steps for climate change adaptation and mitigation.

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Mr Du Toit McLachlan joined the ISS in February 2021. He holds an honour's degree in international relations from the University of Pretoria and is the AFI website manager. His research interests include gender equality, international trade, and international geopolitics.

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