



COMESA

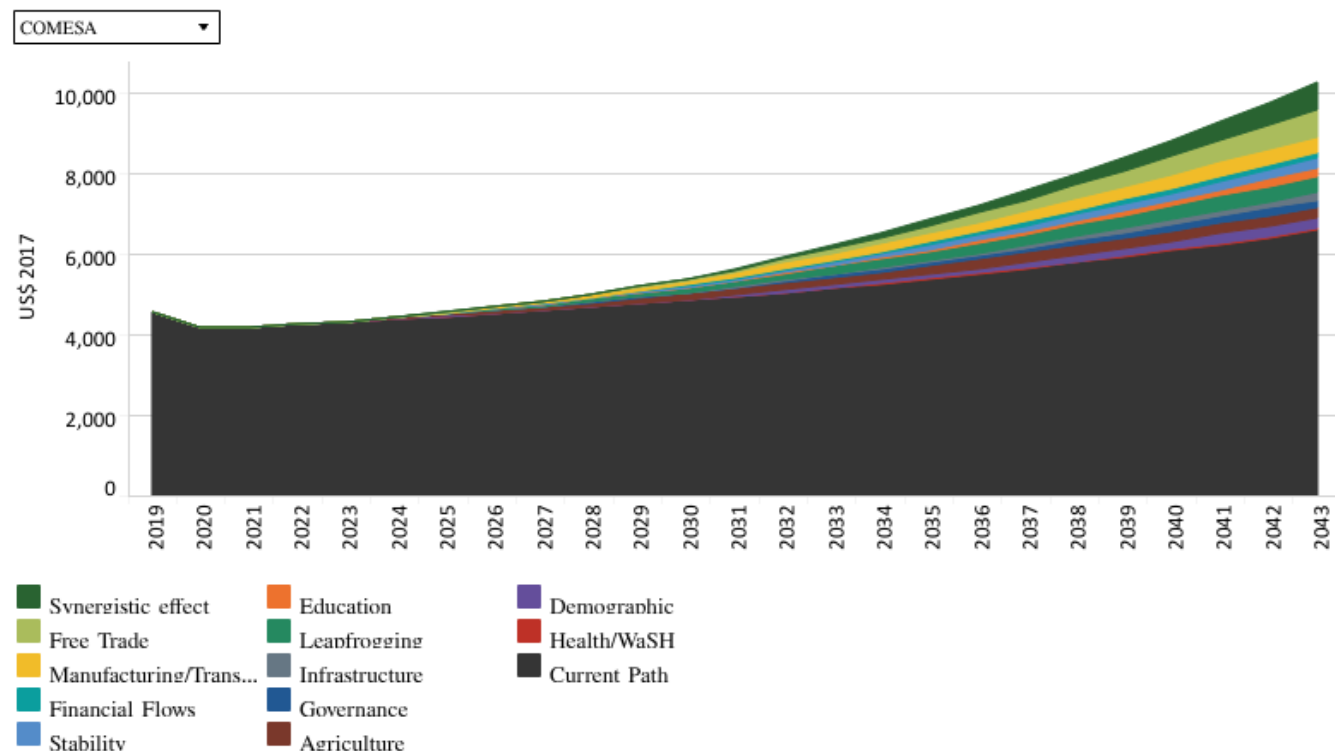
Combined Agenda 2063 scenario

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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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.

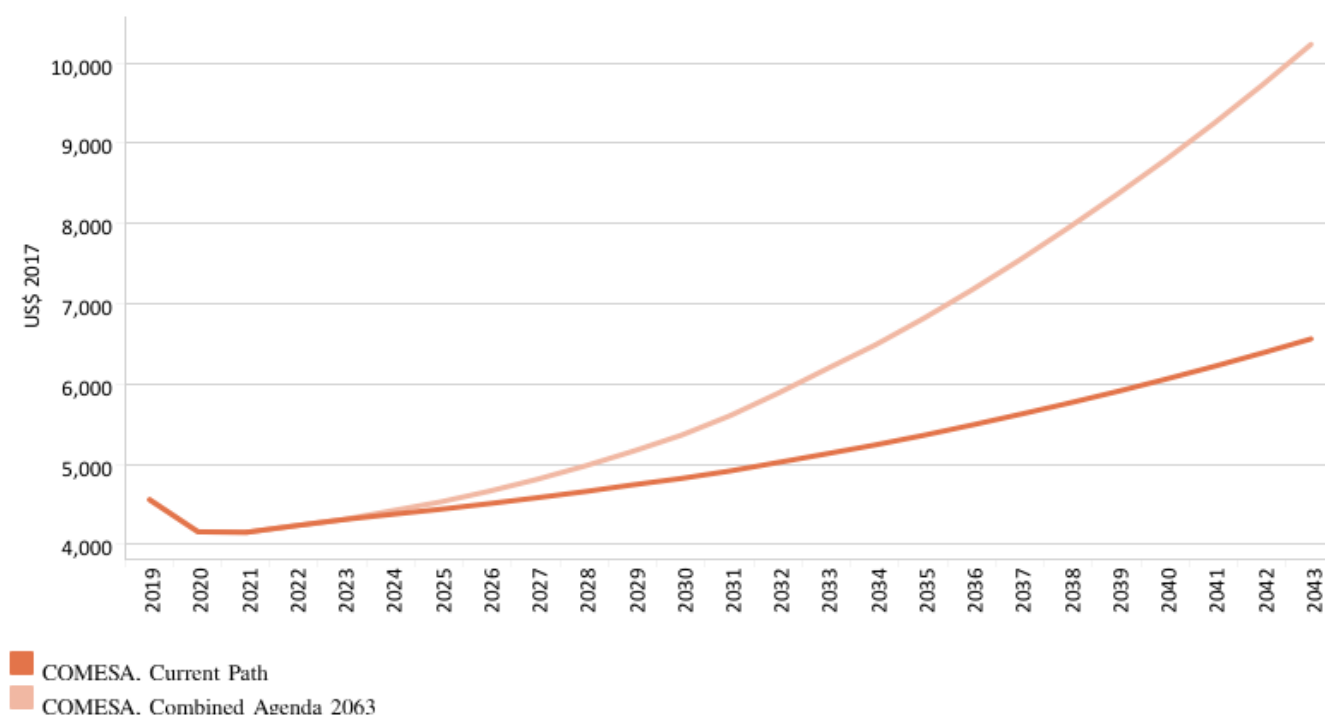
COMESA stands to benefit the most from the Free Trade scenario in terms of additional GDP per capita above the Current Path forecast. In 2043, the scenario would add US\$655 to the Current Path forecast's GDP per capita figure of US\$6 563, followed by the Leapfrogging scenario which would add US\$412. The synergistic effect of implementing all the scenarios' interventions equates to an additional US\$686 in 2043, highlighting the benefits of wide-scale, multi-sectoral reform.

Individual members largely mirror these trends, although certain members, such as the DR Congo and Somalia, would gain more from the Stability scenario or the Leapfrogging scenario, such as Madagascar. The Financial Flows scenario generally ranks low, but for the more diversified and developed economies of Mauritius and the Seychelles, the scenario ranks third and fourth respectively.

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



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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 would dramatically increase COMESA's GDP per capita. The REC's average GDP per capita would reach US\$10 235 in 2043, US\$3 672 higher than the Current Path forecast for the same year. The sizable increase of 56% means the REC opens a positive gap to Africa's average GDP per capita of US\$3 078 in 2043.

The combined impact of implementing all 11 scenarios' interventions is impressive for COMESA's members: Malawi would once again see the largest increase in GDP per capita in the scenario, potentially experiencing a 135.1% increase in 2043, compared to the Current Path forecast. As in earlier scenarios, Mauritius and Seychelles would see the smallest increases of 17.5% and 20.7% respectively above the Current Path forecast in 2043.

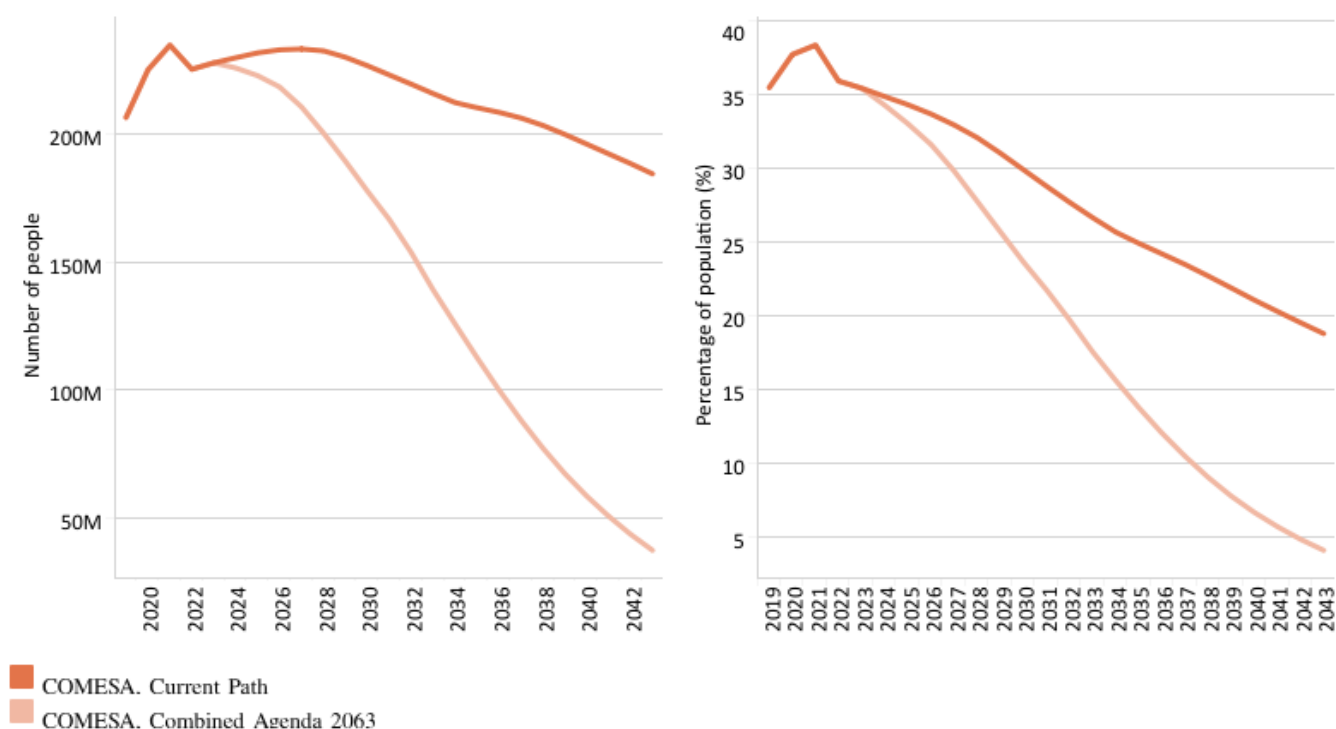
Compared to their 2019 levels, Uganda and Ethiopia could see their GDP per capita quadrupling by 2043, while 13 other members would see increases between 100% and 200%.

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

Millions of people and % of total population



COMESA \$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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The simultaneous implementation of all 11 scenarios' interventions as envisaged in the Combined Agenda 2063 scenario would nearly eradicate extreme poverty at the US\$1.90 poverty line for COMESA by 2043. From a high level of 35.4% in 2019, the poverty rate is projected to rapidly decline to 4.1% by 2043, a 14.7 percentage point decrease compared to the Current Path forecast for 2043. A reduction of that magnitude would result in 146.9 million fewer people being extremely poor in 2043.

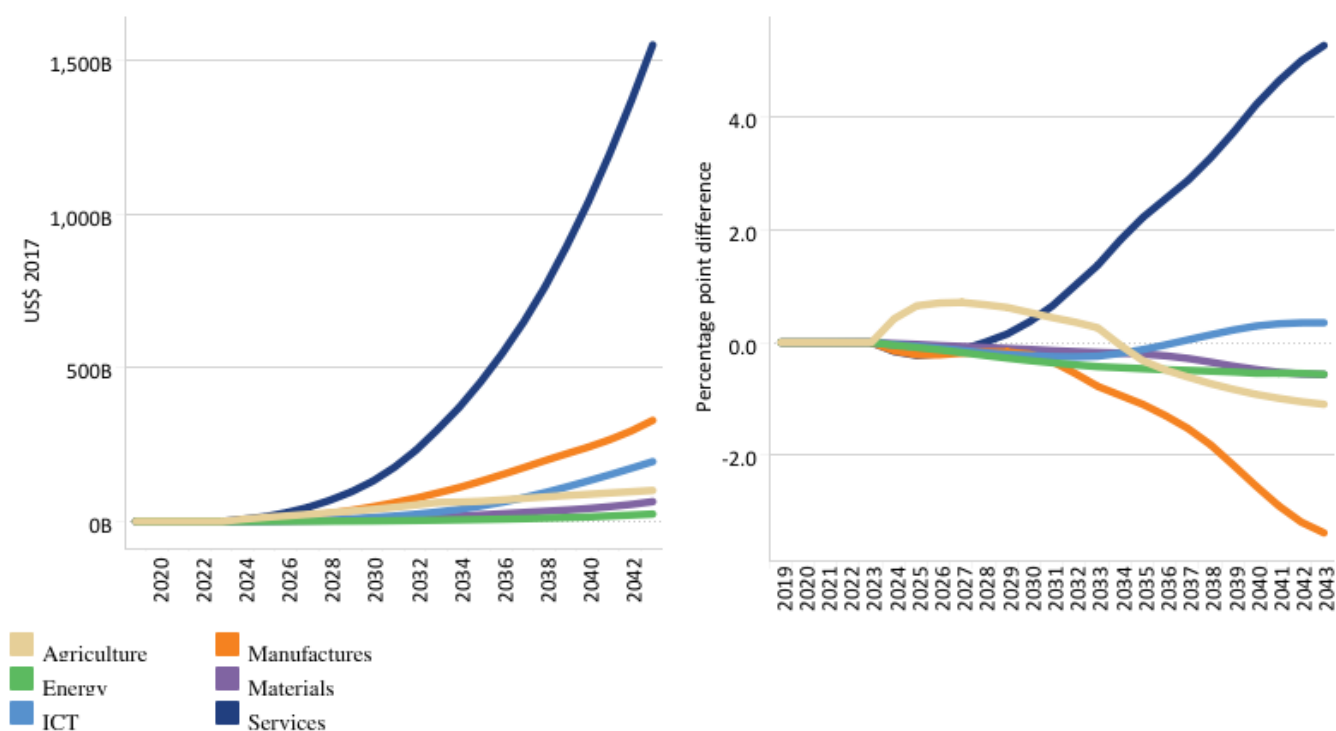
The Combined Agenda 2063 scenario has the potential to decrease the poverty rates of five countries (Malawi, the DR Congo, Burundi, Madagascar and Somalia) by 50 percentage points or more by 2043 compared to the Current Path forecast, eradicating extreme poverty in Malawi in the process. Four other low-income countries would also see extreme poverty eradicated, but Burundi and Madagascar would still have poverty rates above 17% in 2043, highlighting the urgent need for action.

Similarly, at the US\$3.20 level, Eswatini would continue to struggle even with a 35.4 percentage point reduction, only reducing its poverty rate to 24.5% by 2043.

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



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

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

The Combined Agenda 2063 scenario significantly boosts the service sector for COMESA, increasing its percentage contribution to total GDP by 5.3 points compared to the Current Path forecast for 2043. In contrast, the manufacturing sector declines in its percentage contribution, potentially seeing a 3.4 percentage point reduction by 2043. Both sectors do however grow in absolute terms, although services far outstrip manufactures — US\$1 551 billion additional GDP to the economy by 2043 compared to the Current Path forecast.

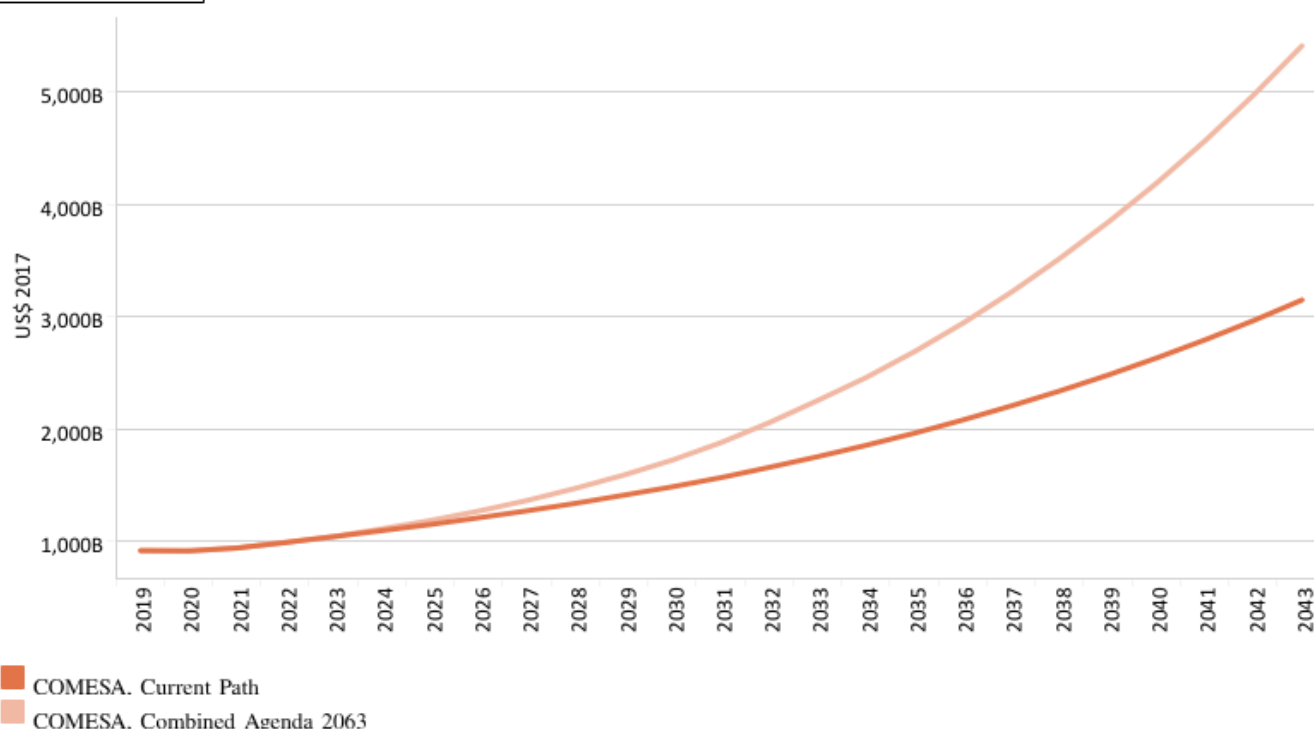
Djibouti is the only country that is projected to see a divergent trend, as its service sector is projected to contribute 6.7 percentage points less to GDP compared to the Current Path forecast, while its manufacturing sector would contribute 7.7 percentage points more. However, the service sector would still contribute 69% of GDP by 2043. Eritrea would see the largest decrease in its manufacturing sector's contribution to GDP, experiencing a potential decrease of 11.3 percentage points in 2043 compared to the Current Path forecast. This could be a negative trend should these activities be replaced with low-end services.

Chart 59: GDP in CP and Combined scenario, 2019–2043

Billions US\$ 2017, market exchange rates



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

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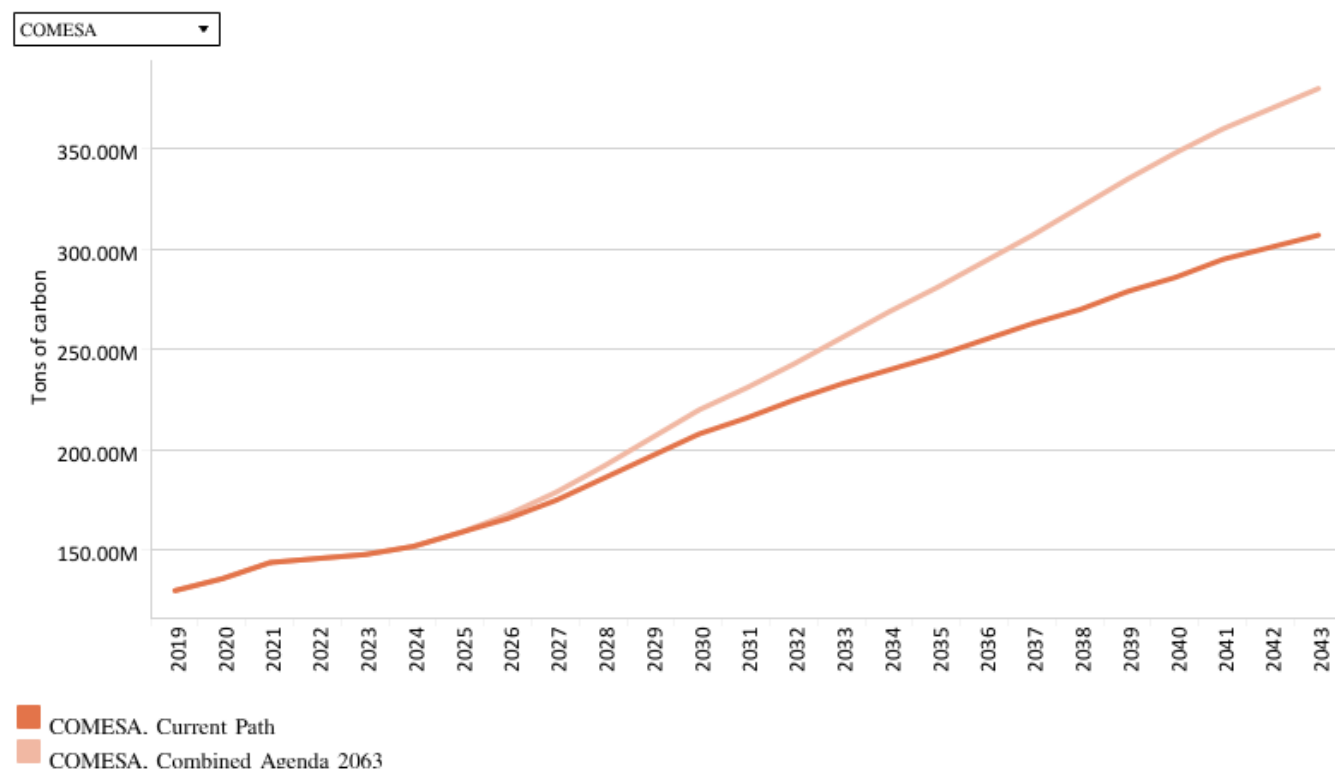
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COMESA's GDP is expected to grow significantly even along the Current Path forecast, reaching US\$3 150 billion by 2043. However, the Combined Agenda 2063 scenario would have a much larger effect, increasing GDP by US\$2 262.8 above the Current Path forecast for 2043 — a 72% increase.

Malawi is projected to see the largest percentage increase compared to its 2019 level in the Combined Agenda 2063 scenario. By 2043, the country's GDP is projected to be US\$193 billion, 145% more than in the Current Path forecast. Ethiopia is also expected to see a significant increase in its GDP, reaching US\$959 billion in 2043, 63% higher than the Current Path forecast for 2043. Additionally, Ethiopia's GDP would constitute 17.7% of COMESA's total GDP by 2043, 10 percentage points more than in 2019.

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 inevitable consequence of the increased economic activity and prosperity envisaged in the Combined Agenda 2063 scenario is increasing carbon emissions, but COMESA's projected increases are not unmanageable. By 2043, carbon emissions are expected to be 380 million metric tons of carbon, 73 million tons more than in the Current Path forecast. Although inescapable if growth is to be realised, attention should be given to ways to combat rising emissions as development occurs.

Zambia is projected to see the largest increase in percentage terms, nearly 135%, in its carbon emissions compared to the Current Path forecast by 2043. The second and third largest increases are expected for Malawi and Ethiopia, which is to be expected considering the discussion about [Chart 59](#) regarding their rapid economic growth in the Combined Agenda 2063 scenario. Egypt continues to be the largest emitter in the REC, reaching 177 million tons of carbon emissions by 2043, a 17.7% increase compared to the Current Path forecast.

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