ECCAS

ECCAS: Scenarios

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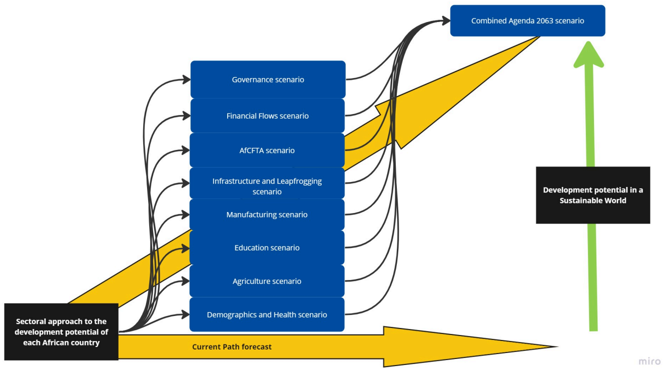
Table of contents

ECCAS: Scenarios

Briefly

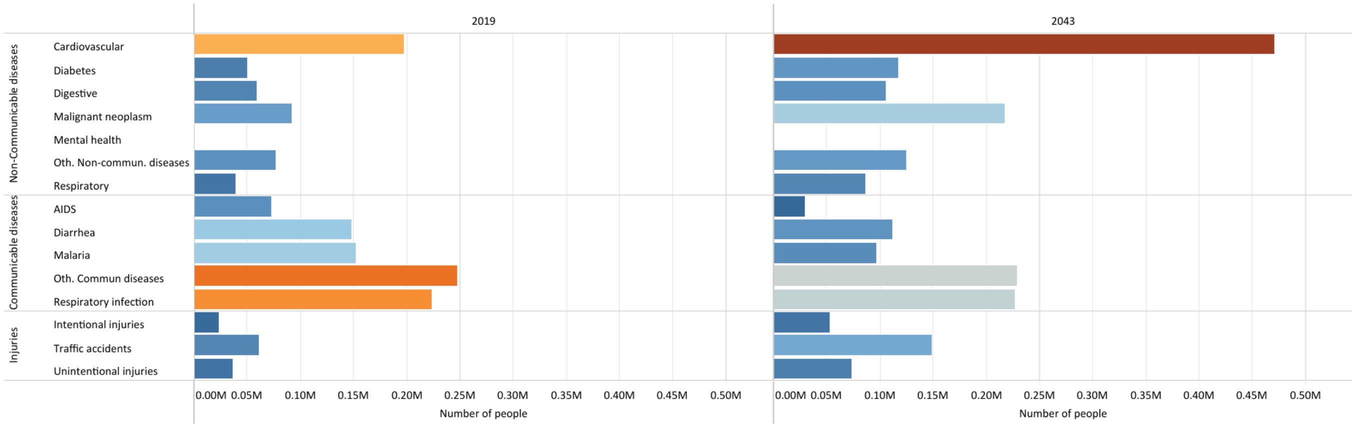
Chart 10: Relationship between Current Path and scenarios



The eight sectoral scenarios as well as their relationship to the Current Path and the Combined scenario are explained in the About Page. Chart 10 summarises the approach.

Demographics and Health scenario

Chart 11: Mortality distribution in the Current Path, 2019-2043



Source: IFs 8.22 initialising from IHME data

Chart 11 presents the mortality distribution in 2023.

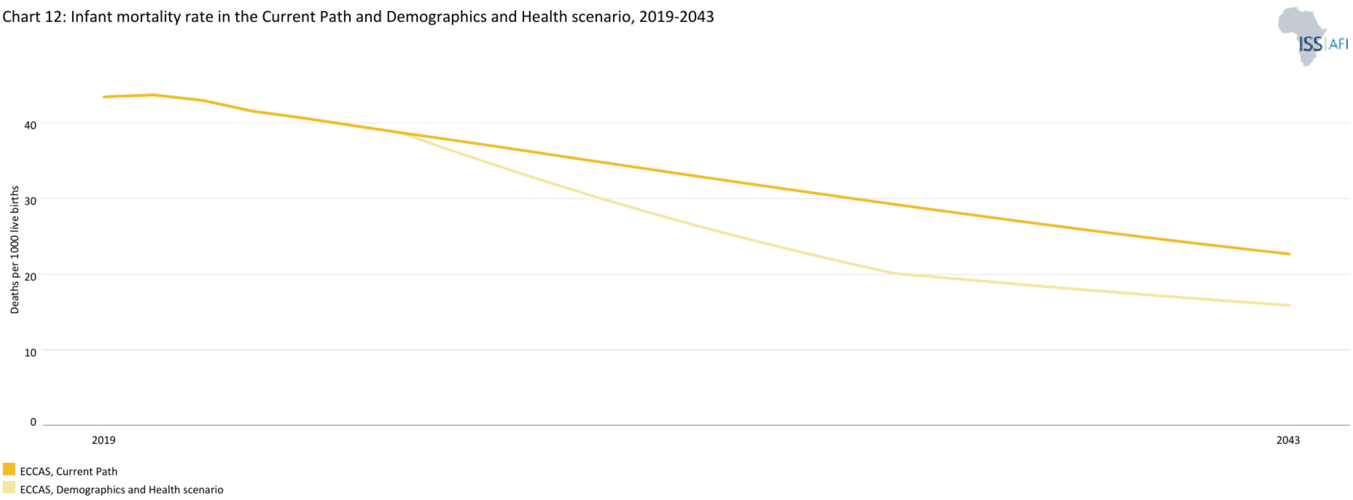
The Demographics and Health scenario envisions ambitious improvements in child and maternal mortality rates, enhanced access to modern contraception, and decreased mortality from communicable diseases (e.g., AIDS, diarrhoea, malaria, respiratory infections) and non-communicable diseases (e.g., diabetes), alongside advancements in safe water access and sanitation. This scenario assumes a swift demographic transition supported by heightened health and water, sanitation, and hygiene (WaSH) infrastructure investments.

Visit the themes on Demographics and Health/WaSH for more detail on the scenario structure and interventions.

In 2021, according to the GBD, neonatal disorders and malaria were amongst the leading causes of death in several ECCAS member states, including Angola, Burundi, Cameroon, DR Congo and Equatorial Guinea. Other countries in the region, such as Chad, Central African Republic, Rwanda, and São Tomé and Príncipe, had different leading causes, including diarrheal diseases, tuberculosis, stroke and lower respiratory infections. This highlights significant health challenges across ECCAS, with neonatal disorders being a leading cause of death in nearly all countries. This indicates widespread issues with maternal and child health, underscoring the need for improved healthcare services for pregnant women, newborns and young children. Additionally, the prevalence of diseases like malaria, HIV/AIDS, tuberculosis and diarrheal diseases across multiple member states reveals persistent public health challenges related to infectious diseases. These conditions are often linked to factors like poverty, inadequate healthcare infrastructure, limited access to clean water and sanitation, and insufficient disease prevention and treatment programs.

In 2023, communicable diseases were the leading cause of death in ECCAS, accounting for 54% of fatalities (867 000). Non-communicable diseases followed at 37% (589 000). However, this trend is projected to reverse: by 2034, non-communicable diseases will surpass communicable diseases as the primary cause of death in the region. By 2035, non-communicable diseases will account for 45% of deaths, while communicable diseases will decline to 44%. This shift will continue, with non-communicable diseases reaching 52% of deaths by 2043 and communicable diseases decreasing to 35%. Despite the grim outlook, the projected increase in non-communicable diseases reflects positive developments in the region as rising life expectancy, incomes and living standards are associated with a higher incidence of diseases like cancer and stroke. Simultaneously, the decline in communicable diseases, such as HIV/AIDS and malaria, indicates the effectiveness of healthcare advancements. However, this shift presents new challenges for ECCAS healthcare systems, necessitating increased investment in non-communicable disease prevention, diagnosis and treatment.

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



Source: IFs 8.22 initialising from IHME data

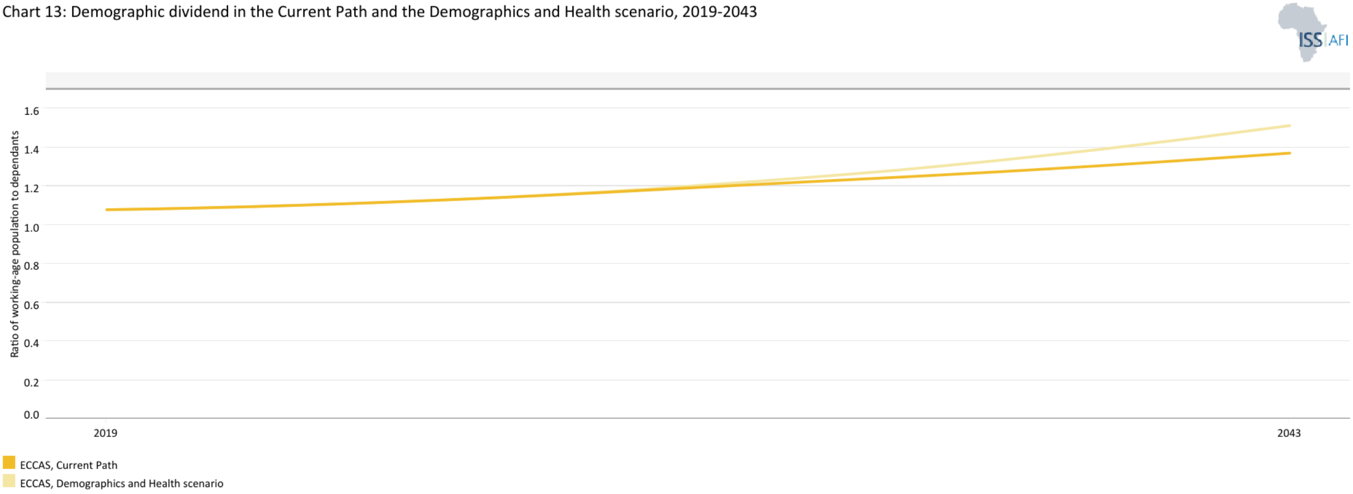
Chart 12 depicts the infant mortality rate in the Current Path versus the Demographics and Health scenario, from 2019 to 2043.

The infant mortality rate is the probability of a child born in a specific year dying before reaching the age of one. It measures the child-born survival rate and reflects the social, economic and environmental conditions in which children live, including their health care. It is measured as the number of infant deaths per 1 000 live births and is an important marker of the overall quality of the health system in a country.

In 2023, the infant mortality rate in ECCAS was 41.04 which means that for every 1 000 infants who were born about 41 died. It is slightly below the average of 42.3 for Africa and also the third-highest among all RECs. Central African Republic, Chad and Cameroon have the highest infant mortality rates (79.4, 66.9 and 43.5 deaths per 1 000 live births, respectively). The rate is lowest in São Tomé and Príncipe, Gabon and the Republic of Congo (19.2, 22.8 and 28 deaths per 1 000 live births, respectively). The health system in the Central African Republic is barely functioning due to a severe shortage of skilled health workers and medical supplies. Limited access to vaccination means that easily preventable diseases continue to take a toll. In Chad, many people live in rural areas with little to no access to healthcare, resulting in a Universal Health Coverage rate of approximately 31.4%. Coverage for reproductive, maternal, newborn and child health in Chad is similarly low, estimated to be between 28.9% and 33.5%. Conversely, since 1985, São Tomé and Príncipe, with support from UNFPA, has significantly expanded reproductive health services, leading to improved indicators for child and maternal health.

By 2043, in the Demographics and Health scenario, infant mortality in the region will decline to 15.9 deaths per 1 000 live births, which will be above Africa's average of 25.1, yet lower than the 22.7 in the Current Path. Central African Republic (38.6), Chad (33) and Cameroon (19.7) will have the highest infant mortality rates in the Demographics and Health scenario by 2043, while rates are lowest for São Tomé and Príncipe (9), Rwanda (7.8) and Angola (11.2). The Demographics and Health scenario will have the greatest impact on Central African Republic, Chad and Burundi, where the infant mortality rates will drop by 23.2, 12.1 and 11 deaths per 1 000 live births, respectively. São Tomé and Príncipe, Republic of Congo and Angola will experience the smallest reductions in this scenario, namely a drop of 1.7, 3.9 and 4.3 per 1 000 live births, respectively.

Chart 13: Demographic dividend in the Current Path and the Demographics and Health scenario, 2019-2043



Source: IFs 8.22 initialising from UNPD Population Prospects data

Chart 13 presents the demographic dividend in the Current Path compared to the Demographics and Health scenario, from 2019 to 2043.

The dividend is the window of economic growth opportunity that opens when the ratio of working-age persons to dependents increases to 1.7 to 1 and higher.

In 2023, the ratio of the working-age population to dependents in ECCAS was 1.08:1, meaning that for every 1.08 persons of working age, one dependent was supported. This ratio was lower than the 1.26:1 recorded for Africa as a whole, making it the lowest among the RECs. The low ratio indicates a smaller working-age population relative to dependents, which can constrain ECCAS's economic growth potential. At 1.82:1, the AMU has the highest ratio since the median age of its population is the highest amongst all RECs.

Gabon has the highest ratio of working-age population to dependents (about 1.47:1), followed by Equatorial Guinea and Rwanda (1.38:1 and 1.34:1, respectively). The ratio is the worst in the Central African Republic, Chad and Burundi (0.97:1, 1:1 and 1.02:1, respectively). In these countries, their large youthful populations mean that economic growth has to be particularly rapid if it is to translate into income growth.

The Demographics and Health scenario will increase this ratio to 1.51:1 by 2043 for the region, meaning it will not enter a potential demographic window of opportunity even by then. The ratio will be slightly below the average of 1.57:1 for Africa but 0.14 higher than on the Current Path. The impact of the scenario among member countries will differ, with ratios ranging from 2.29:1 (Rwanda) to 1.24:1 (Niger).

The countries that will experience the greatest change in their ratio as a result of the Demographics and Health scenario are Rwanda, São Tomé and Príncipe and DR Congo. Chad and Equatorial Guinea will see the smallest change in their ratios. Because the contribution that labour makes to economic growth is particularly important at lower levels of development, the slow demographic transition in these countries serves as an important drag on income growth.

Agriculture scenario

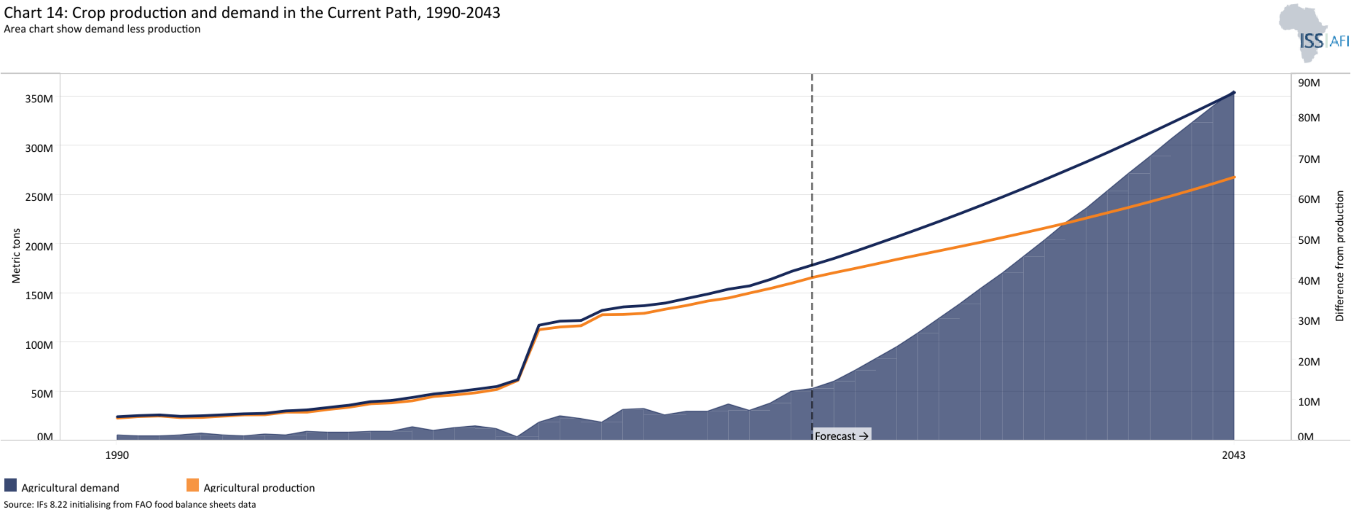


Chart 14 shows the crop production and demand from 1990 to 2043.

The Agriculture scenario envisions an agricultural revolution that ensures food security through ambitious yet feasible increases in yields per hectare, thanks to improved management, seed, and fertilizer technology, as well as expanded irrigation and equipped land. Efforts to reduce food loss and waste are emphasized, with increased calorie consumption serving as an indicator of self-sufficiency and prioritizing it over food exports. Additionally, enhanced forest protection signifies a commitment to sustainable land use practices.

Visit the theme on Agriculture for our conceptualisation and details on the scenario structure and interventions.

High population growth rates, coupled with low agricultural productivity and the instability caused by weak land tenure systems, ethnic clashes and political conditions, pose significant challenges to food systems in Central Africa.

Given the agricultural sector's significant contribution of over 20% to Central Africa's economic growth, a regional conference was convened in Cameroon in January 2024 by ECCAS, in partnership with CORAF and FAO, to modernise the Common Agricultural Policy (CAP) and bolster agricultural resilience within the region.

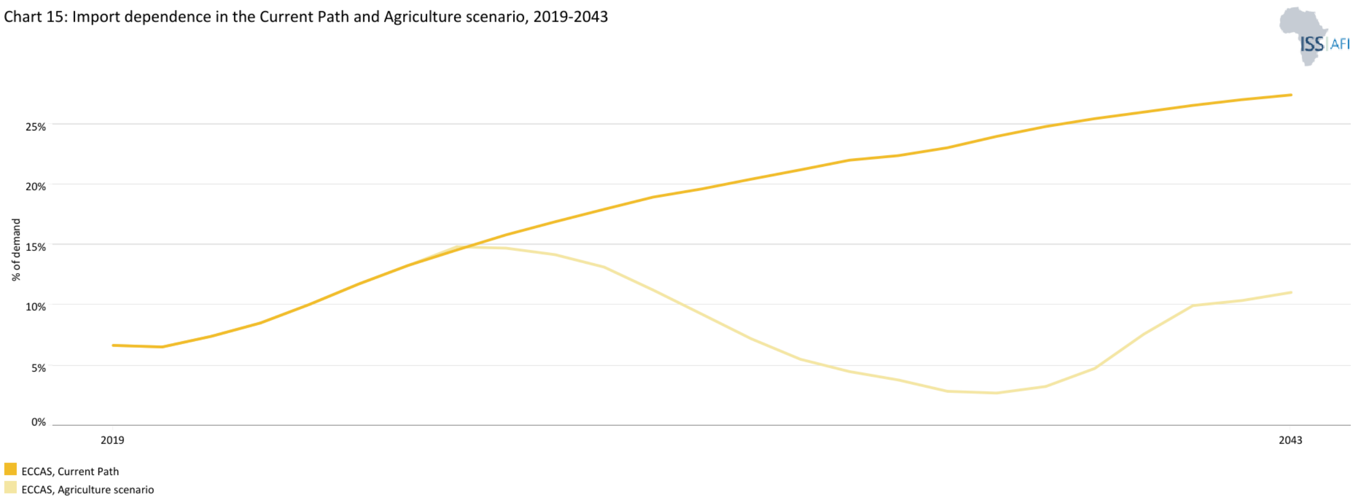
In 1990, ECCAS's crop production was only 23.1 million metric tons. By 2023, ECCAS's production had increased to 166.3 million metric tons, making it the fifth-largest producer among RECs. However, even with this growth, the region's demand for agricultural products exceeded supply by 12.7 million metric tons as demand stood at 179 million metric tons.

DR Congo dominated crop production within ECCAS, contributing 60.4 million metric tons or 41.5% of the region's total output. Cameroon and Angola followed closely, producing 29.6 million metric tons (20.4%) and 24.4 million metric tons (16.8%), respectively. São Tomé and Príncipe produced the smallest crop output within ECCAS, contributing only 126 thousand metric tons, or less than 1% of the region's total. Equatorial Guinea and Gabon followed with 300 thousand and 1.7 million metric tons, respectively.

The region's demand exceeded its crop production, indicating a shortfall of 8.9 million metric tons in domestic supply. DR Congo exhibited the highest demand at 61.9 million metric tons with a shortfall of 1.5 million metric tons, followed by Cameroon and Angola at 31.5 million and 27.5 million metric tons, respectively. São Tomé and Príncipe, Equatorial Guinea and Gabon continued to exhibit the lowest agricultural demand within ECCAS, with consumption levels of 160 thousand, 839 thousand, and 2 million metric tons, respectively.

This supply-demand gap is projected to worsen. Under the Agriculture scenario, ECCAS's crop production will reach 295.7 million metric tons by 2043, while demand will increase to 356.3 million metric tons. This will result in a shortfall of 60.6 million metric tons.

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



Source: IFs 8.22 initialising from FAO Food Balance Sheets data

Chart 15 presents the import dependence in the Current Path and the Agriculture scenario, from 2019 to 2043.

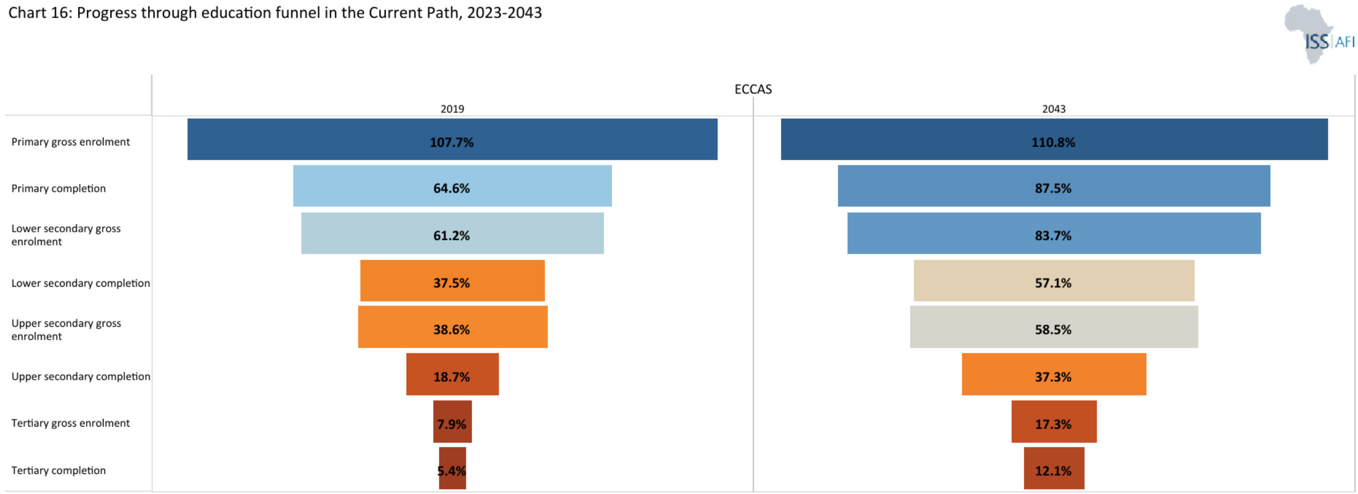
In 2023, Africa had an import dependence of 12%, indicating that it imported 12% of its total consumption, while ECCAS had a lower import dependence of 8.8%. This suggests that ECCAS was more self-sufficient in terms of producing goods and services for its domestic market. ECCAS ranked third among the RECs in terms of lowest import dependence, following SADC and EAC. Equatorial Guinea exhibited the highest import dependence within ECCAS, importing over 58% of its total consumption. This low level of self-sufficiency, coupled with rising global food prices and supply shocks, has exacerbated food insecurity, particularly among rural populations. São Tomé and Príncipe followed with an import dependence of 23.2%, while Gabon stood at 18.6%. Burundi, Chad and DR Congo exhibited relatively low import dependence, with rates of 5.5%, 6.1% and 6.6%, respectively.

DR Congo is the primary destination for agricultural imports at all processing stages within ECCAS. ECOWAS and ECCAS hold the largest market shares for highly processed imports. Among ECCAS members, Gabon, the Central African Republic and Cameroon emerged as the leading importers of unprocessed, semi-processed and highly processed agricultural goods.

ECCAS's import dependence is projected to undergo a substantial transformation under the Agriculture scenario, declining from 25.9% to 8.2% by 2043. This represents a reduction of 17.7 percentage points. Angola is poised to make the most significant strides, achieving a surplus with a negative import dependence of -9.6%. In contrast, Equatorial Guinea's import dependence is expected to worsen, reaching 64.3%.

Education scenario

Chart 16: Progress through education funnel in the Current Path, 2023-2043



Source: IFs 8.22 initialising from Barro-Lee data

Chart 16 presents the progress through the educational system compared to the Africa income group (primary gross enrolment, primary completion, lower-secondary gross enrolment, lower-secondary completion, upper-secondary enrolment, upper-secondary completion, tertiary enrolment, and tertiary completion (for 2023 and 2043)).

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.

Many ECCAS countries, including the Central African Republic, are grappling with a learning crisis. In sub-Saharan Africa, a staggering 89% of children are unable to read and understand an age-appropriate text by age 10, a condition known as learning poverty. Even countries like Angola, which ended its civil war over a decade ago, continue to face significant challenges in their education systems. Areas where classrooms were destroyed during the war have not been rebuilt and classes are often held outside and are forced to be canceled due to bad weather conditions. Factors such as inadequate infrastructure, gender inequalities, poor-quality education and limited funding hinder educational progress in countries like Cameroon. In Burundi, while school enrollment rates have increased, they remain high for younger children and drop significantly for adolescents due to household poverty, early pregnancy coupled with school violence. DR Congo struggles with both access and affordability of education, despite policies aimed at providing free primary schooling. São Tomé and Príncipe faces similar challenges, with limited access in rural areas due to geographical isolation and poverty. Additionally, the language barrier, as the official language of instruction is Portuguese, presents a significant challenge for students, many of whom speak local dialects at home. Equatorial Guinea's education system is largely private but faces challenges due to underqualified teachers, inadequate resources and poor conditions.

Rwanda, a post-genocide society, has implemented a unique approach to historical education, emphasising a single, approved narrative. However, the country's education system still faces challenges, including a lack of English proficiency among many teachers. Chad is also plagued by low schooling rates, particularly among girls, and high illiteracy levels. Teacher qualifications are generally low, with many lacking beyond secondary education.

In 2023, the primary gross enrollment rate for ECCAS was 112%, surpassing Africa’s average of 104.6%. However, the gross enrollment rates for lower-secondary education were 66.2%, slightly above the continental average of 65.4%, while upper-secondary enrollment lagged 41%, behind Africa's average of 42.3%. Additionally, the tertiary enrollment rate stood at 8.2%, significantly lower than Africa's average of 14.4%.

ECCAS demonstrated strong primary education enrollment at 112%, ranking second among the RECs behind SADC (112.7%). However, its performance declined at higher levels. In lower-secondary education, ECCAS ranked fifth at 66.2%, trailing CENSAD (66.4%) and COMESA (66.6%). At the upper-secondary level, it maintained a fifth-place position among RECs. The greatest challenge for ECCAS was tertiary education enrollment, which stood at 8.2%, the second lowest among the RECs, with only the EAC performing slightly worse at 8%.

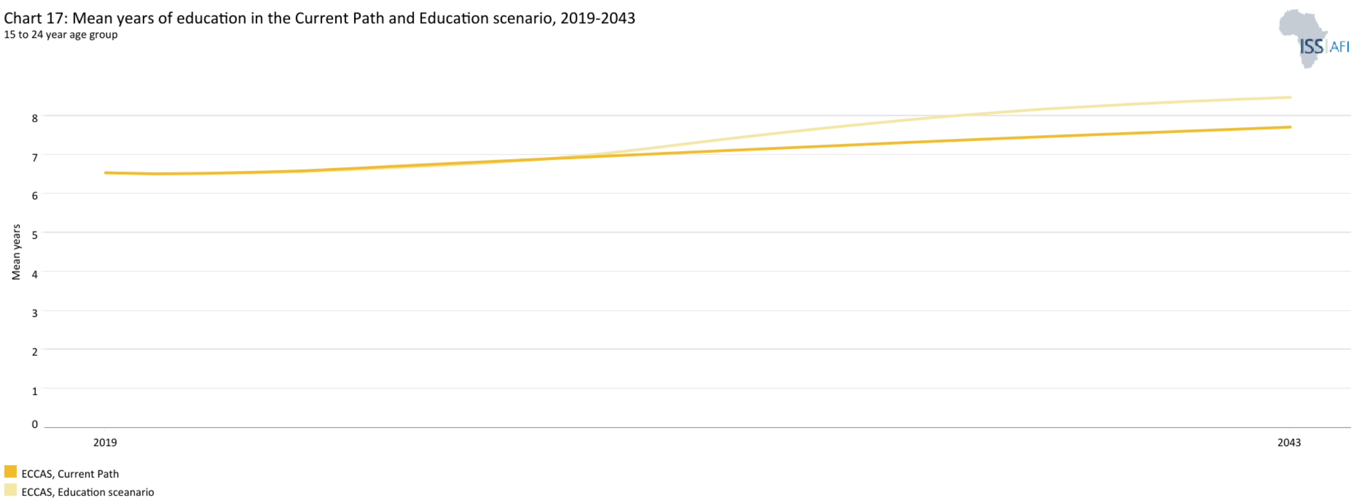
In 2023, ECCAS's education system lagged behind the African average at all levels. Primary completion rates stood at 71.3%, lower than the continental average of 77.2%. Lower-secondary completion rates were even more concerning, at 39% compared to Africa's 47.3%. The situation worsened at the upper-secondary level, with only 21% of students completing, significantly below the African average of 28.9%. Tertiary education completion rates were particularly low, reaching just 5.8% compared to Africa's 8.5%. ECCAS also faced significant challenges in education completion rates. At the primary level, it ranked second lowest among RECs, surpassed only by IGAD(56.3%). In lower- and upper-secondary education, ECCAS had the lowest completion rates of all RECs. Additionally, it ranked fifth for tertiary education completion, trailing IGAD (6.6%).

In the Education scenario, primary enrollment rates will increase from 110.8% to 117.4%, representing a 6% increase from the Current Path. Lower-secondary enrollment will rise from 83.8% to 123.7%, a substantial 47.5% increase from the Current Path. Upper-secondary enrollment is anticipated to grow from 58.5% to 91.3%, a 56.2% increase from the Current Path. Tertiary enrollment will also improve significantly, increasing from 17.3% to 31.6%, a 45.1% increase from the Current Path.

Under the Education scenario, ECCAS will make significant strides in education completion by 2043. Primary completion rates will increase from 87.5% in the Current Path to 117.6% (an increase of 34.1%). Lower-secondary completion will rise from 57% to 71.6% (25.3% increase), and upper-secondary completion will grow from 37.3% to 43.7% (17.2% increase). Tertiary completion will also improve, increasing from 12% to 16.1% (34.2% increase).

Chart 17: Mean years of education in the Current Path and Education scenario, 2019-2043

15 to 24 year age group



Source: IFs 8.22 initialising from Barro-Lee data

Chart 17 depicts the mean years of education in the Current Path compared to the Education scenario (for the 15 to 24 age group), from 2019 to 2043.

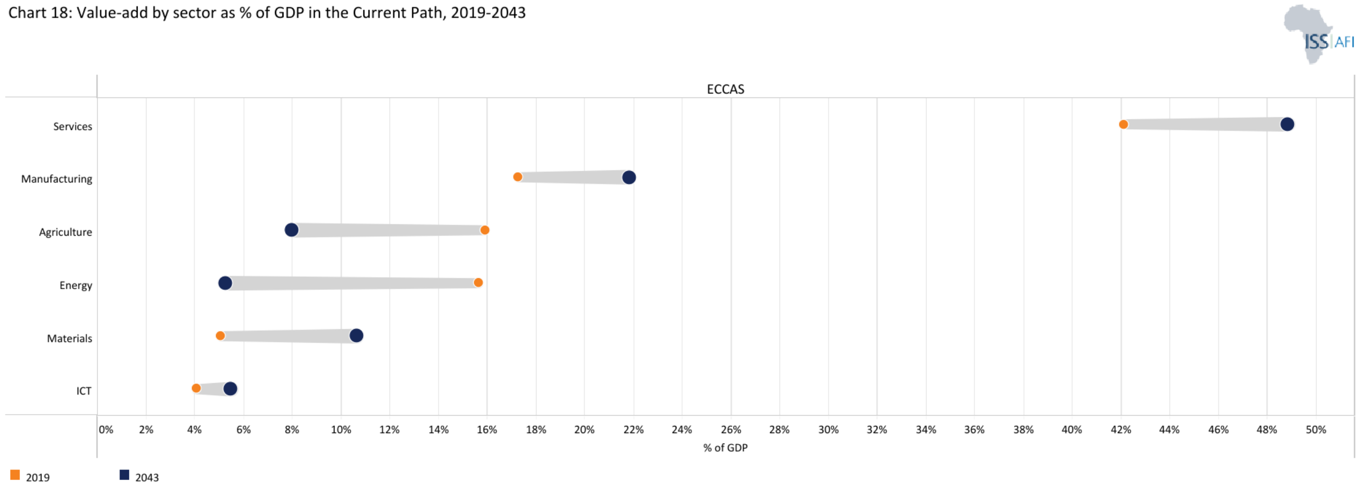
The average years of education in the adult population aged 15 to 24 is a good first indicator of how the stock of knowledge in society is changing.

Education is fundamental to development, but improvements in this area take time to show impact. In 2019, the average ECCAS adult aged 15-24 had completed 6.5 years of education, lagging behind Africa's average of 7.1 years. Under the Education scenario, ECCAS's average will rise to 8.5 years by 2043, exceeding Africa's projected increase to 8.1 years.

In 2019, males in ECCAS had an average of 6.8 years of education, while females had 6.3 years, reflecting a gender gap of 0.5 years. By 2043, this gap will be closed in the Education scenario as gender equality improves. Gabon will have the highest average years of education at 12.6, followed by Cameroon with 10.2 years. The Central African Republic will have the lowest, with an average of 5.6 years, falling below the ECCAS regional average. Equatorial Guinea is poised to benefit the most from the Education scenario, gaining an additional 1.64 years of education on average, followed by DR Congo with an increase of 1.24 years.

Manufacturing scenario

Chart 18: Value-add by sector as % of GDP in the Current Path, 2019-2043



Source: IFs 8.22 initialising from IMF World Economic Outlook data

Chart 18 presents manufacturing as a share of GDP in the Current Path compared to the Africa income group, from 2019 to 2043.

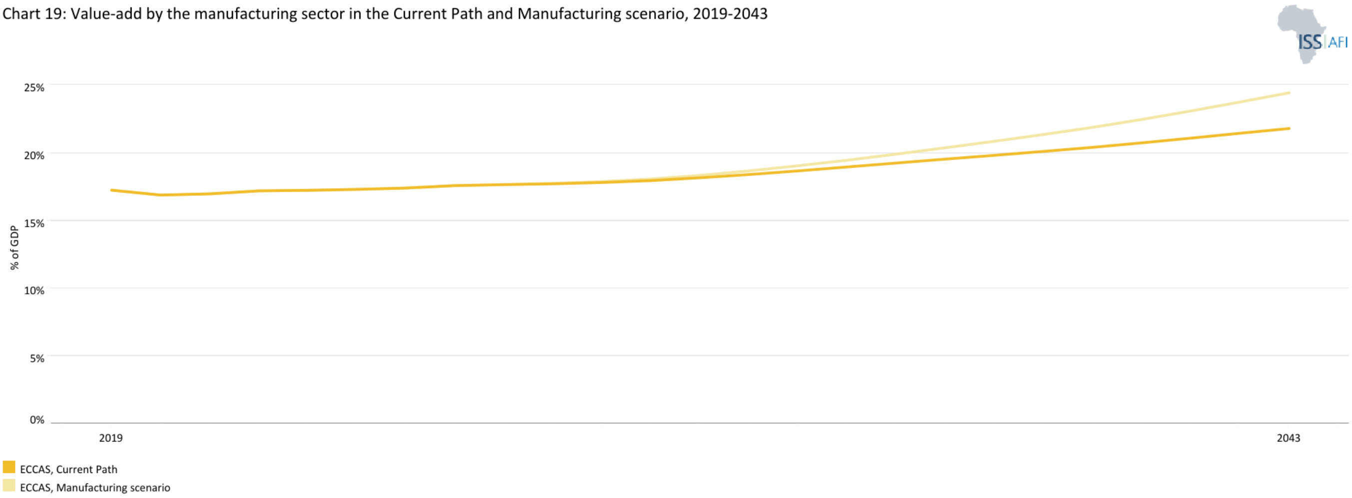
In the Manufacturing scenario, reasonable but ambitious growth in manufacturing is envisaged through increased investment in the sector, in research and development (R&D), and through improved government regulation of businesses. This is aimed at enhancing total labour participation rates, particularly among females where appropriate, and is accompanied by increased welfare transfers to unskilled workers to mitigate the initial rises in inequality typically associated with a low-end manufacturing transition.

Visit the theme on Manufacturing for our conceptualisation and details on the scenario structure and interventions.

Manufacturing plays a relatively minor role in the region's GDP compared to sectors such as agriculture and extractive industries. The existing manufacturing base is often tied to the processing of raw materials, particularly in resource-rich countries like Angola, DR Congo and Gabon. However, this processing is typically limited to basic stages, offering minimal value addition. The growth of manufacturing is hindered by infrastructure challenges, particularly in transportation and energy. Unreliable electricity supply and high energy costs pose significant barriers, especially for landlocked countries such as Chad and the Central African Republic. Despite this, Africa is poised to become the 'next great manufacturing hub', attracting a significant portion of the 100 million labour-intensive manufacturing jobs anticipated to relocate from China by 2030. Rwanda, a member of ECCAS, is among the countries expected to benefit from this trend, having recently implemented policies to promote manufacturing and industrial development.

In 2023, ECCAS's value added manufacturing sector contributed 17.4% to its GDP, slightly below the African average of 17.6%. Within the RECs, ECCAS ranked third, trailing behind SADC. Within ECCAS, DR Congo boasted the highest manufacturing contribution to its GDP at 25.3%, followed closely by Gabon at 24.1% and Equatorial Guinea at 18.9%. Chad, São Tomé and Príncipe, and Burundi exhibited the lowest manufacturing shares, with contributions of 4.8%, 7.3% and 10.4%, respectively. By 2043, manufacturing is projected to account for 24.6% of ECCAS's economy, reflecting a 41% increase from 2023. At this stage, ECCAS will place second among Africa's RECs in manufacturing output after AMU. Equatorial Guinea will surpass DR Congo, reaching the highest manufacturing share among member states at 28.9%, followed by the Republic of Congo at 27.2%%. Chad will hold the lowest manufacturing share at 6.8%, with Sao Tome and Principe close behind at 9.6%.

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



Source: IFs 8.22 initialising from IMF World Economic Outlook data

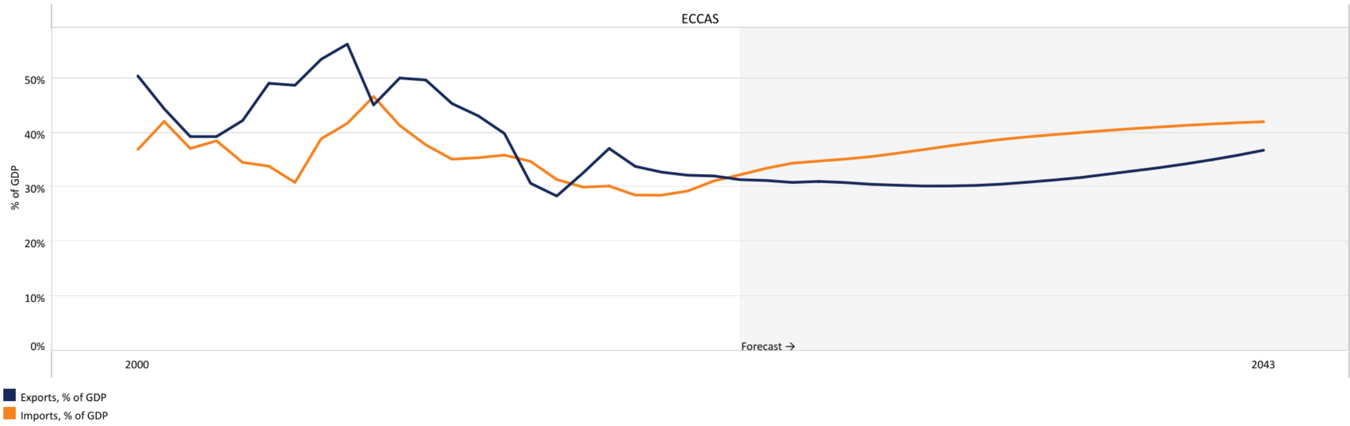
Chart 19 shows the value-add of the manufacturing sector in the Current Path and the Manufacturing scenario, from 2019 to 2023.

The Central African subregion is seeking to address economic challenges and achieve sustainable development through a harmonized industrialization and economic diversification masterplan (PDIDE). This plan aims to double the region's industrial contribution to GDP, currently at 12%, by focusing on structural transformation, value addition, and boosting manufacturing capabilities across various sectors.

Under the Manufacturing scenario, ECCAS's manufacturing value-added share will reach 24.5% by 2043, surpassing both the African average of 21% and its own Current Path average of 21.8%. ECCAS will also have the highest manufacturing value-added share among all RECs, surpassing both AMU and COMESA. Equatorial Guinea will surpass Gabon as the region's leader in manufacturing value-added share, with its value-added share to increase from 31.1% to 34.6% by 2043. Gabon and the Republic of Congo will follow closely, with projected shares of 29% (from 26.1%) and 28.9% (from 25.2%). Chad, São Tomé and Príncipe, and Burundi will maintain the lowest manufacturing value-added shares within ECCAS, with anticipated figures of 7.8%, 10% and 17.2%, respectively.

AfCFTA scenario

Chart 20: Export and imports as % of GDP in the Current Path, 2000-2043



Source: IFs 8.22 initialising from WDI data

Chart 20 shows exports and imports as per cent of GDP, from 1990 to 2043.

The AfCFTA scenario represents the impact of fully implementing the African 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.

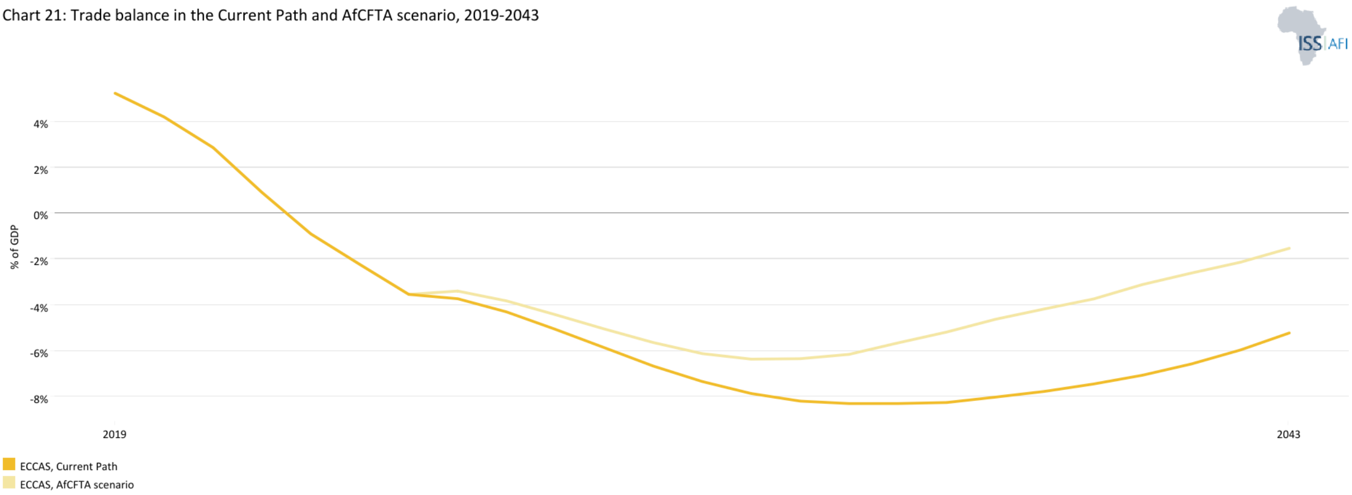
The economies of ECCAS are largely driven by natural resources. Crude petroleum and diamonds are significant exports in many nations, including Angola, Cameroon, the Republic of Congo, Equatorial Guinea and Gabon. Other notable exports include gold, copper, cobalt and agricultural products such as coffee, tea and cocoa. Key imports for most countries in the region include refined petroleum products, wheat, rice, medicines and machinery. Some countries also import fertilisers, gold, vehicles and packaged medicaments.

ECCAS's primary trading partners are China, India, the United Arab Emirates and the Netherlands. On a continental level, ECCAS member states have made limited progress in reducing tariffs on intra-regional trade, with only 34% of tariff lines reduced to zero. This has resulted in ECCAS having the lowest share of intra-regional trade as a percentage of GDP compared to the other RECs. A study found that mobile phones and export lead times can positively affect intra-ECCAS and intra-ECOWAS trade. However, internet access appears to be more influential in boosting trade within ECCAS. Inançli and Mahamat (2019) also identified factors like GDP, population, distance and political stability as drivers of bilateral trade within ECCAS.

In 2023, the total export value of ECCAS was US$74.3 billion, representing 31.6% of GDP while its total imports were valued at US$76.7 billion, constituting 32.5% of GDP. This indicates that the region had a trade deficit, as the value of imports exceeded that of exports. Angola led the region in exports with a total value of US$25 billion, representing 33.6% of ECCAS’s total exports. It was followed by DR Congo with exports worth US$17.5 billion and Cameroon with US$7.1 billion. Regarding imports, DR Congo led the region with imports valued at US$21 billion, accounting for 27.4% of ECCAS’s total imports. Angola followed with imports worth US$17.3 billion, and Cameroon with US$9 billion.

In the AfCFTA scenario, by 2043, the total value of exports will reach US$419.9 billion, accounting for 49.3% of GDP. This is in contrast to the Current Path, where exports will be US$278.7 billion, representing 36.8% of GDP. Therefore, under the AfCFTA scenario, the ECCAS economy will gain an additional US$141.2 billion in export value. The total value of imports will reach US$432.8 billion under the AfCFTA scenario, compared to US$318.2 billion in the Current Path indicating that, under the scenario, ECCAS will experience a trade deficit as imports will exceed exports. DR Congo will dominate the region's exports, reaching US$178.8 billion, which will account for 23.6% of the total ECCAS GDP. In contrast, Burundi will trail with exports valued at just US$363 million, representing a meager 4.38% of the regional GDP. Similarly, DR Congo will lead in imports with US$182.5 billion, comprising 24% of ECCAS GDP, while São Tomé and Príncipe will rank lowest with imports of US$778 million, contributing less than 1% to the total.

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



Source: IFs 8.22 initialising from WDI data

Chart 21 shows the trade balance as a share of GDP in the Current Path compared to the AfCFTA scenario, from 2019 to 2043.

In December 2019, the UN Economic Commission for Africa (ECA) and the ECCAS General Secretariat organised a regional workshop in Cameroon, to prepare comprehensive lists of services for unhampered trade under the AfCFTA regime. This workshop, held from December 3 to 5, brought together national experts from the eleven ECCAS Member States. The primary goal was to support these states in drafting convergent regional lists of commitments in five priority sectors: financial services, transport, telecommunications/ICTs, professional services and tourism. This initiative underscores ECCAS's commitment to enhancing trade openness and integration within the region. By aligning with the AfCFTA Protocol on Trade in Services, ECCAS aims to liberalise trade in services at a continental level, fostering economic growth and regional cooperation.

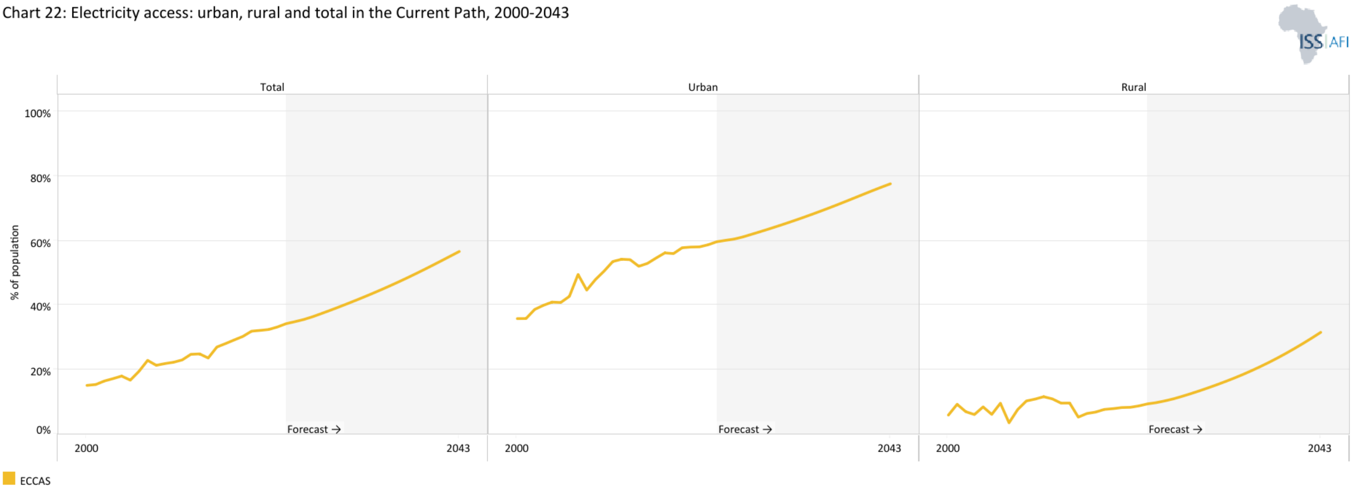
In 2023, ECCAS had a trade balance equivalent to 64.1% of its GDP. This indicates that the region's exports significantly exceeded its imports, contributing positively to its overall economic performance. Among the member states, the Republic of Congo had the highest trade balance, amounting to 121% of its GDP. This exceptionally high figure suggests that the Republic of Congo's economy was heavily reliant on exports, likely driven by its oil and mineral resources. Equatorial Guinea followed with a trade balance of 92.3% of its GDP, also reflecting a strong export-oriented economy. Under the AfCFTA scenario, the Republic of Congo maintained its top position with 155.1% percent, with Chad following at 109.8% indicating that Chad may have successfully diversified its exports to take advantage of the reduced trade barriers within the AfCFTA.

By 2043, under the AfCFTA scenario, ECCAS will achieve a trade balance of 100% of GDP, a significant improvement compared to 78.8% in the Current Path. The Republic of Congo will maintain its leading position with a trade balance of

155.1% of GDP, highlighting an even greater reliance on exports. Chad will follow with a trade balance of 109.8% of GDP, reflecting its robust export activities. These figures underscore the potential impact of the AfCFTA in enhancing trade dynamics within ECCAS, particularly benefiting countries with strong export sectors.

Large Infrastructure and Leapfrogging scenario

Chart 22: Electricity access: urban, rural and total in the Current Path, 2000-2043



Source: IFs 8.22 initialising from WDI data

Chart 22 presents the access to electricity in the Current Path for urban, rural and total populations, from 1990 to 2043.

The Large Infrastructure and Leapfrogging scenario involves ambitious investments in road and renewable energy infrastructure, improved electricity access and accelerated broadband connectivity. It emphasises the adoption of modern technologies to enhance government efficiency and the rapid formalisation of the informal sector, incorporating significant investments in major infrastructure projects like rail, ports, and airports, while highlighting the positive impacts of renewables and ICT.

Visit the themes on Large Infrastructure and Leapfrogging for our conceptualisation and details on the scenario structure and interventions.

A 2011 study revealed that Central Africa's infrastructure lagged behind all other African regions in terms of overall performance. Transportation within the region was characterised by slow speeds, high costs, poor road conditions, border delays, port congestion, time-consuming administrative procedures, a fragmented railway network and inefficient air transport. Additionally, the ICT backbone remained underdeveloped, with low access rates and exorbitant service costs.

Despite possessing the continent's largest hydroelectric potential at 650 million gigawatt hours per year (GWh/year), or over 57% of the total, Central Africa remains the least electrified sub-region in Africa. This is evidenced by its annual electricity production rate of approximately 4% compared to Southern Africa's 60%. Additionally, its per capita electricity consumption is around 109 kilowatt-hours (kWh) per year, far below North Africa's 740 kWh and Southern Africa's 1,600 kWh.

In 1991, ECCAS's urban electricity access rate stood at 63%, below the African average of 71%. Among the RECs, ECCAS ranked third, trailing ECOWAS and CENSAD. ECCAS's urban electricity access rate declined from 63% in 1991 to 59.6% in 2023, driven by rapid population growth outpacing electricity infrastructure development and ongoing political instability in the region. This rate is well below the African average of 80.8% and ranking lowest among all RECs. Within ECCAS, Gabon boasted the highest urban electrification rate at 98.6%, followed closely by Cameroon at 93.6% and Equatorial Guinea at 90.8%. In contrast, the Central African Republic exhibited the lowest rates at 32.7%, followed by Chad and DR Congo, which reported 36.8% and 45.3%.

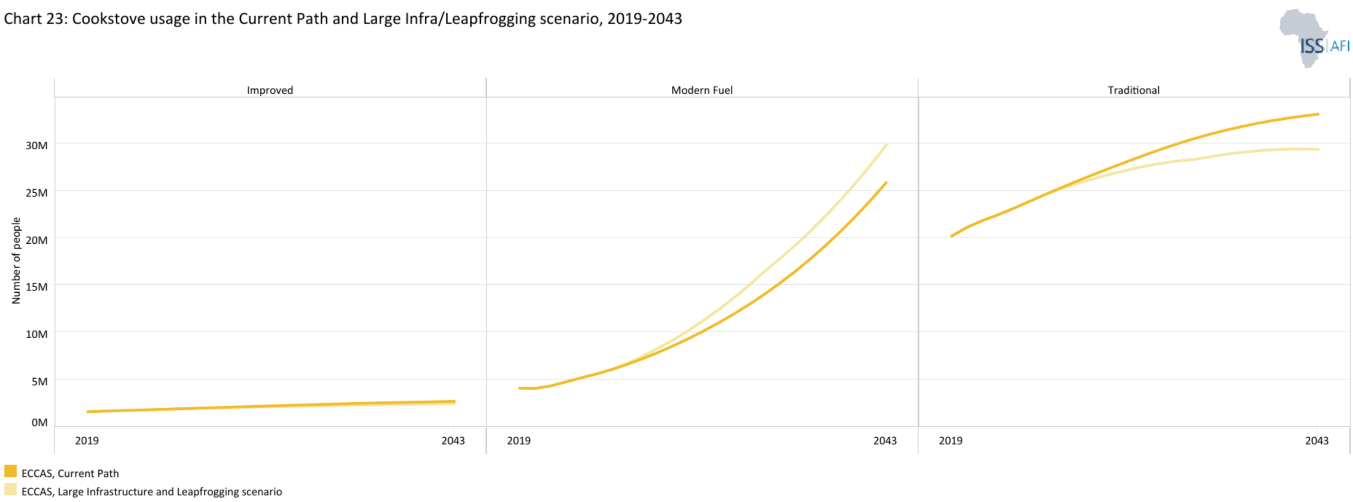
In 1991, ECCAS's rural electrification rate was a mere 6.1%, significantly lagging behind Africa's average of 12.2%. It held the lowest position among all RECs. Despite modest improvements, the rate increased to only 9.4% by 2023, still falling short of Africa's average of 39.5%. ECCAS remained at the bottom of the RECs, with SADC ranking second lowest at 22%, highlighting the region's substantial gap in rural electrification. Within ECCAS, São Tomé and Príncipe led the way in rural electrification with a rate of 69%, followed by Rwanda at 42.8% and Gabon at 30.1%. In contrast, Chad, the Central African Republic and Burundi exhibited alarmingly low rates, with only 1.3%, 1.8% and 2.3%, respectively.

ECCAS's total electrification rate increased modestly from 29% in 1991 to 34.2% in 2023. However, this progress lagged behind the African average which rose from 29.4% to 57% during the same period. As a result, ECCAS slipped from third to last place among the RECs in terms of electrification rates. Gabon led the region in total electrification with a rate of 92.7%, followed closely by São Tomé and Príncipe at 76.1% and Equatorial Guinea at 69.1%. In contrast, Chad, Burundi and the Central African Republic exhibited significantly lower rates, with only 9.8%, 10.7% and 15%, respectively.

Under the Large Infrastructure and Leapfrogging scenario, ECCAS's urban electrification rate will increase slightly from 77.6% to 81.4% by 2043. However, this improvement will still fall short of the overall African average which will reach 89% during the same period. Cameroon and Gabon will achieve universal urban electrification by 2043, reaching a rate of 100%. DR Congo and Burundi will make the most significant strides, with their electrification rates increasing from 73.8% and 79% in the Current Path to 78% and 85.4%. ECCAS's rural electrification rate will increase from 31.8% to 41.5% by 2043. However, this improvement will still fall short of the overall African average, which will be 55.4% during the same period.

São Tomé and Príncipe will maintain its leadership in rural electrification, with a projected rate of 100%. Rwanda and Cameroon will showcase the most improvement, with their rates increasing from 73.6% to 97% and 51.7% to 64.1%, respectively. ECCAS's total electrification rate will increase modestly from 56.7% to 62.9% by 2043. However, this improvement will still fall short of the overall African average which will reach 72% during the same period. Rwanda will lead with the highest electrification rate, with a projected rate of 97.5%, surpassing Gabon with 97.2%. DR Congo and Rwanda will make significant strides, increasing their rates from 51.6% to 57.9% and 78.1% to 97.5%, respectively.

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



Source: IFs 8.22 initialising from IEA data

Chart 23 shows the number of people using cookstoves in the Current Path versus the Large Infrastructure and Leapfrogging scenario, from 2019 to 2043.

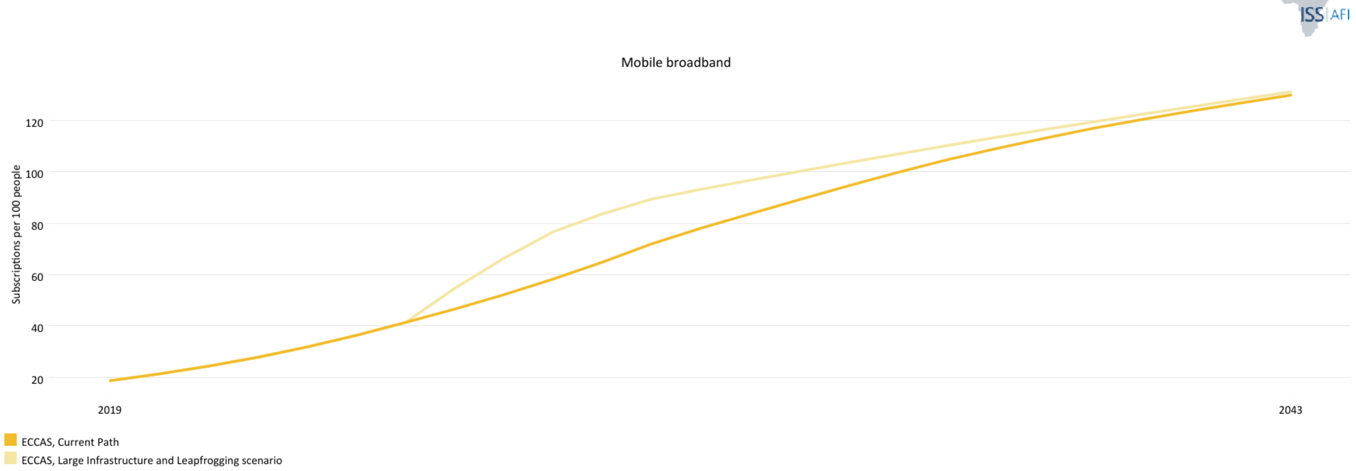
The scenario distinguishes between three types of cookstoves: traditional, improved and modern. The transition from traditional fuels to modern fuels can significantly improve the health and well-being of communities, particularly women and children, by reducing exposure to harmful pollutants, preventing accidental fires and burns, and saving time and labor.

In 2023, 23 million people in the region relied on traditional stoves fueled by firewood or charcoal for cooking. This placed ECCAS seventh among African regions in terms of the prevalence of traditional stoves, following EAC (30 million), SADC (39.5 million) and IGAD (41.4 million). On average, 140 million people in Africa used traditional stoves. DR Congo had the highest number of people relying on traditional cookstoves within ECCAS, with 9.2 million. Rwanda followed with 3 million. In contrast, São Tomé and Príncipe and Gabon exhibited significantly lower figures, with only 22 000 and 77 000 people, respectively, using traditional stoves. The Large Infrastructure and Leapfrogging scenario predicts a decline in people using traditional cookstoves from 33.1 million in the Current Path to 29.4 million by 2043. Despite this 3.7 million decrease overall, more people will be relying on traditional cookstoves than in 2023. DR Congo will continue to have the highest number of people relying on traditional cookstoves, with 13.2 million, down from 14.5 million in the Current Path. Burundi follows with 3.9 million, down from 4 million in the Current Path. São Tomé and Príncipe will have the least number of people relying on traditional cookstoves, with 16 000 people, from 19 000 in the Current Path. Rwanda showed significant improvement, with 1.8 million who will be relying on traditional cookstoves, down from 3 million in the Current Path.

In 2023, 1.8 million people in ECCAS relied on improved cookstoves, falling below Africa's average of 8.8 million. Among the RECs, ECCAS ranked sixth, following IGAD with 1.85 million users and ECOWAS with 2.6 million. Within ECCAS, Cameroon led in the adoption of improved cookstoves with 500 000 users, followed closely by Chad with 505 000 and DR Congo with 468 000. In contrast, São Tomé and Príncipe had significantly lower adoption rates, with only 400 users, while Gabon reported 1 600. In the Large Infrastructure and Leapfrogging scenario, ECCAS will have 2.5 million improved cookstove users, a decline of 243 000 compared to the Current Path. Chad will lead in adoption by 2043, with 1.05 million users, slightly down from 1.07 million in the Current Path. DR Congo will follow with 692 000 users, down from 765 000. São Tomé and Príncipe will continue to have the fewest users, with only 300 people relying on improved cookstoves.

In 2023, 5.2 million people in ECCAS used modern cookstoves, well below Africa's average of 81.2 million. Among the RECs, ECCAS ranked sixth, following IGAD with 6.7 million users and EAC with 4.4 million. Angola led in adoption within ECCAS, with 1.9 million users, followed by Cameroon with 1.2 million and DR Congo with 903 000. In the Large Infrastructure and Leapfrogging scenario, by 2043, ECCAS will have 29.9 million modern cookstove users, an increase of 3.98 million compared to the Current Path. DR Congo will have the highest number of users, reaching 9.16 million, up from 7.7 million. Angola follows with an estimated 7.4 million users, rising from 7 million. São Tomé and Príncipe will have the fewest, with only 39 000 people utilising modern cookstoves.

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



Source: IFs 8.22 initialising from ITU data

Chart 24 presents the percentage of the population and number of people with access to mobile and fixed broadband in the Current Path compared to the Large Infrastructure and Leapfrogging scenario, from 2019 to 2043. The user can toggle between mobile and fixed broadband.

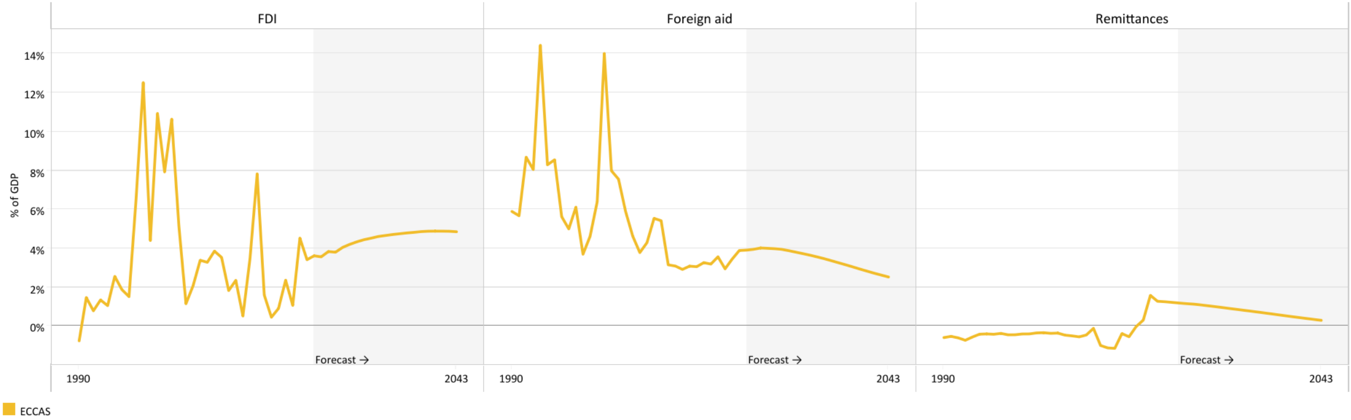
Mobile technology is the cornerstone for e-commerce in ECCAS, overcoming infrastructure challenges. With limited fixed broadband access, mobile devices are the primary gateway to the internet. Additionally, mobile money services have expanded online payment options, mitigating cash-on-delivery risks and addressing the low penetration of traditional banking methods. By the end of 2019, ECCAS boasted 17 active mobile money services serving approximately 50 million registered accounts. However, several factors hinder the growth of e-commerce in ECCAS. These include limited access to affordable mobile internet, especially for low-income populations, low adoption of digital payments, insufficient addressing systems, bureaucratic customs procedures, and a challenging business environment for e-commerce startups.

In 2023, ECCAS had 32.05 mobile broadband subscriptions per 100 people, significantly lower than the African average of 58.1 subscriptions per 100 people, representing a 44.8% gap compared to the continental average. ECCAS had the lowest number of mobile subscriptions among the RECs. In contrast, AMU had the highest with 105.4 subscriptions per 100 people, while IGAD was slightly higher than ECCAS at 44.1 subscriptions per 100 people. Among the member states, Gabon had the highest number of mobile broadband subscriptions, with 107.3 subscriptions per 100 people, followed by Rwanda with 68.9 subscriptions per 100 people. Equatorial Guinea had the lowest, with only 6.9 subscriptions per 100 people, closely followed by the Central African Republic at 8.8 subscriptions per 100 people. By 2043, under the Large Infrastructure and Leapfrogging scenario, ECCAS will reach 131.2 mobile broadband subscriptions per 100 people, up by 1.3 from the 129.9 subscriptions in the Current Path. Gabon will maintain the highest number of subscriptions, with 153.4 per 100 people, a slight increase of 0.1 from the Current Path. Rwanda will follow with 144.4 subscriptions per 100 people, up by 1.6 from 142.8. The Central African Republic will have the fewest subscriptions at 104.8 per 100 people, an increase of 2.1 from the Current Path, followed by Burundi with 123.8 subscriptions per 100 people, up by 1.9.

Internet access is expanding rapidly in Africa, offering a valuable solution for connecting remote and rural populations in ECCAS. Fixed broadband can support the growth of digital media, improve access to government services and boost business productivity. However, the growth in ECCAS lags behind the continental average. In 2023, fixed broadband access in ECCAS was 2.2 per 100 people, compared to the African average of 3.5. This placed ECCAS seventh among the RECs, ahead of ECOWAS, which had 1.9 subscriptions per 100 people, respectively. In the Current Path, fixed broadband access in ECCAS will reach 20.6 subscriptions per 100 people by 2043. Under the Large Infrastructure and Leapfrogging scenario, this figure will rise to 30.5, an increase of 9.9. Cameroon will have the highest number of subscriptions at 40.8, up by 8.1 from 32.7 in the Current Path. Most member states will experience substantial growth, with DR Congo increasing to 26.2 subscriptions per 100 people, up by 9 from 17.2 in the Current Path, and Chad rising to 28.6 subscriptions per 100 people, up by 10.1 from 18.5 in the Current Path.

Financial Flows scenario

Chart 25: FDI, foreign aid and remittances as % of GDP in the Current Path, 1990-2043



Source: IFs 8.22 initialising from IMF data

Chart 25 depicts the trends in Foreign Direct Investment, aid and remittances as a percentage of GDP, from 1990 to 2043.

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 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.

The ECCAS group's net aid will rise significantly from US$9.1 billion in 2023 to US$19.13 billion in 2043. However, as the economies within the Community expand, the relative impact of aid decreases. While aid as a percentage of GDP increases initially, it ultimately declines, falling from 3.9% in 2023 to 2.5% in 2043 under the Current Path. The Financial Flows scenario, which involves a more gradual reduction in aid as a percentage of GDP, results in higher overall aid levels for the ECCAS group.

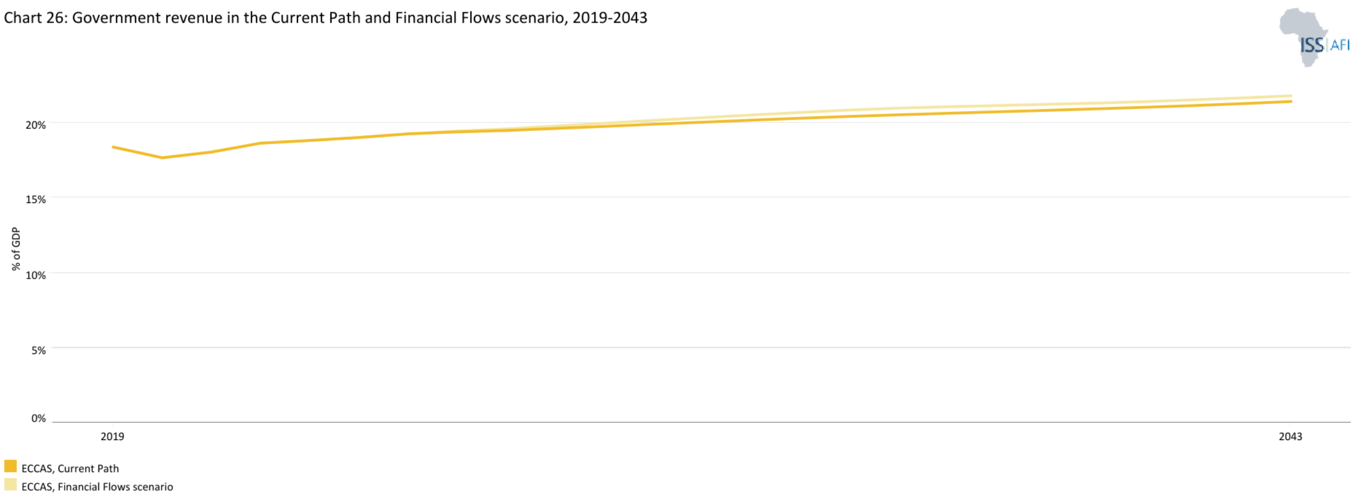
The distribution of aid within the ECCAS group is uneven. Upper-middle-income countries like Gabon and Equatorial Guinea receive minimal aid. Conversely, low-income nations, particularly Burundi and the Central African Republic, rely heavily on aid. While CAR's aid as a percentage of GDP declines under the Current Path, it remains higher under the Financial Flows scenario. The Democratic Republic of Congo (DR Congo) receives the most aid in absolute terms, with an increase of US$1.036 billion in 2043 compared to the Current Path. In 2043, aid to the DR Congo constitutes 3.5% of its GDP under the Financial Flows scenario, exceeding the 3.2% projected under the Current Path. Under the Financial Flows scenario, Equatorial Guinea's aid levels will decline to 0.2% of GDP by 2043. Due to their relatively high GDP per capita, Angola's aid will drop to 0 percent of GDP during the same period.

Remittances are a crucial component of many African economies, contributing significantly to their GDP. Beyond their economic impact, remittances serve as a lifeline for many African households, providing crucial income and driving local development. In 2022, remittances accounted for an average of 1.4% of GDP in Central Africa. The cost of sending US$200 in remittances to the ECCAS region averages 9.5%, significantly exceeding the SDG target of less than 3%. The leading remittance-sending countries to ECCAS are primarily francophone European nations, with France accounting for 13% and Belgium for 11%. Most migrants, both men and women, are concentrated in the DR Congo (16%), Uganda (8%) and Rwanda (7%). In 2023, remittances made up 1.1% of ECCAS's GDP, the second lowest among the RECs, with only SADC having a lower share at 0.2% of GDP. The Central African Republic had the highest reliance on remittances within ECCAS, accounting for 40.7% of its GDP. Burundi followed closely at 36.6%, while Chad received remittances equivalent to 2.6% of its GDP. In contrast, Angola and Gabon experienced net outflows of remittances, with negative percentages of -0.79% and -0.76% of GDP, respectively. By 2043, remittances in ECCAS will account for 0.47% of GDP under the Financial Flows scenario, compared to 0.30% in the Current Path. Burundi will have the highest remittance-to-GDP ratio at 32.6%, followed by the Central African Republic at 20.6%. On the other end, Equatorial Guinea and Gabon will have the lowest ratios, at -1.3% and -0.70%, respectively.

According to the United Nations Conference on Trade and Development (UNCTAD), foreign direct investment (FDI) in Central Africa decreased by 17%. Despite a significant increase in the number and value of greenfield projects, the region was adversely affected by the decline in international project finance deals.

In 2021, FDI inflows to ECCAS amounted to US$7.3 billion, representing 8.75% of Africa's total inflows, which stood at US$80 billion. In 2023, Equatorial Guinea, with its abundant natural resources, particularly oil, received the highest FDI inflows, accounting for 11.5% of its GDP. The growing mining sector has attracted significant investor interest. Equatorial Guinea has made significant progress in its economic development, particularly through business-friendly reforms and the exploration of its natural resources. The government has streamlined regulations and reduced bureaucracy, making it easier for businesses to operate. This has fostered innovation and economic growth, especially in the industrial sector. The country is also capitalising on its natural resources, such as the Congo Basin and its coastal areas, to promote green growth and climate finance. São Tomé and Príncipe, primarily driven by the oil sector, ranked second with FDI inflows amounting to 10.3% of GDP. Under the Financial Flows scenario, FDI inflows will increase significantly in these countries by 2043. In Equatorial Guinea, they will rise to 17.8% of GDP (compared to 15.8% in the Current Path), in São Tomé and Príncipe to 16.8% (from 12.9%).

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



Source: IFs 8.22 initialsing from IMF data

Chart 26 shows government revenue in the Current Path compared to the Financial Flows scenario, from 2019 to 2043. The data is in US$ 2017 and % of GDP.

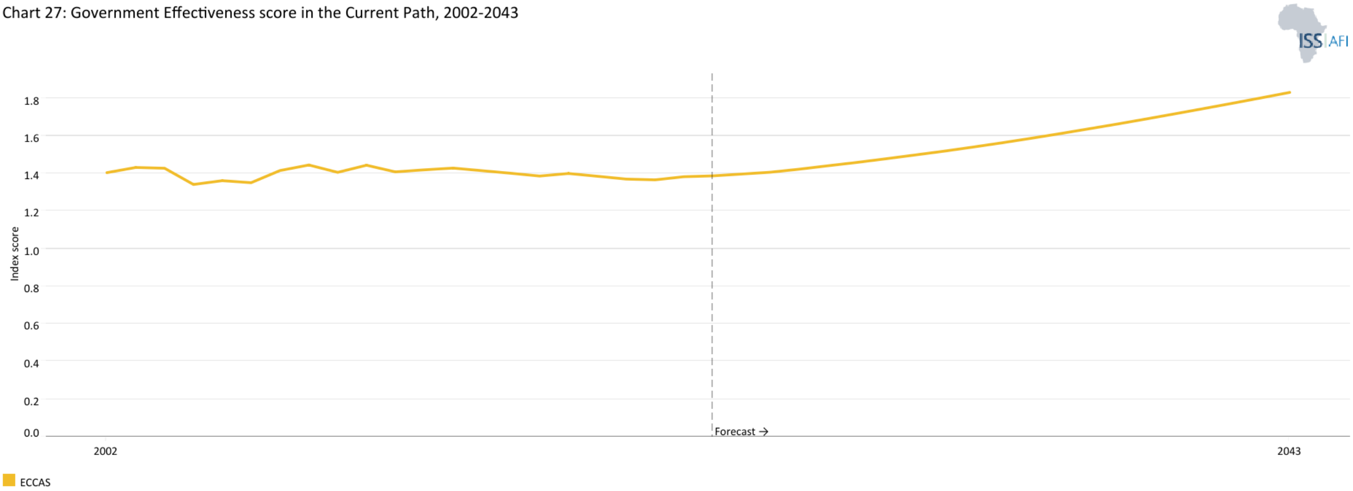
Wagner's law, or the law of increasing state activity, is the observation that public expenditure increases as national income rises. It is, therefore, reasonable to expect that government revenues will increase as a percent of GDP in the Financial Flows scenario compared to the Current Path.

In 2023, the government's total revenue in ECCAS amounted to US$44.6 billion, equivalent to 19% of GDP which was below the average of 20.3% of GDP for Africa. Among member countries, it ranged from 33% of GDP in the Central African Republic to just about 12% of GDP in DR Congo. In the Financial Flows scenario, government revenue will rise to US$170.6 billion in 2043, representing 21.8% of GDP just below the average of 22.8% for Africa. Compared to the Current

Path, the scenario can improve government revenue by an additional US$380 million by 2043. Central African Republic, Republic of Congo and Burundi will have the highest government revenue to GDP ratios at 35%, 29.4% and 28.76%, respectively. DR Congo (17.7%), Cameroon (19%) and Chad (21.7%) will record the lowest government revenue to GDP ratios in the scenario by 2043.

Governance scenario

Chart 27: Government Effectiveness score in the Current Path, 2002-2043



Source: IFs 8.22 initialsing from WGI data

Chart 27 presents the Current Path of government effectiveness from 1990 to 2043.

This scenario assumes better governance consisting of stability, capacity and inclusion. It measures a state's progress using the average of these three indices. To this end, it includes an index (0 to 1) for each dimension, with higher scores indicating improved outcomes.

Visit the theme on Governance for a full conceptualisation and details on the scenario structure and interventions.

Unlike ECOWAS, ECCAS lacks a specific, binding protocol for monitoring democracy and governance within the region. Instead, it relies on the African Charter on Democracy, Elections, and Governance, which has been ratified by only five of its eleven member states. Many ECCAS countries have a history of extending presidential terms through constitutional reviews. Chad is one example, having removed term limits in 2005. As a result, the region holds the African record for the longest-serving presidents. As witnessed in Chad's transition and other Central African nations like Gabon, power transfers frequently involve military coups and fraudulent elections.

In 2023, ECCAS's government effectiveness index score under the Current Path was 1.395. This score will improve to 1.830 by 2043. However, under the Governance scenario, government effectiveness will increase by 22.3% in 2043 compared to the Current Path, reaching a score of 2.237. In 2023, among ECCAS member states, Rwanda had the highest government effectiveness score at 2.623. São Tomé and Príncipe followed with a score of 1.756, and Cameroon with 1.671.

Under the Governance scenario, the government effectiveness scores of the Central African Republic, the DR Congo, and Chad will improve significantly by 2043. The Central African Republic's score will increase by 33%, from 1.140 to 1.520. The DR Congo's score is anticipated to rise by 23.5%, from 1.572 to 1.942. Chad's score will improve by 29.3%, from 1.036 to 1.339.

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

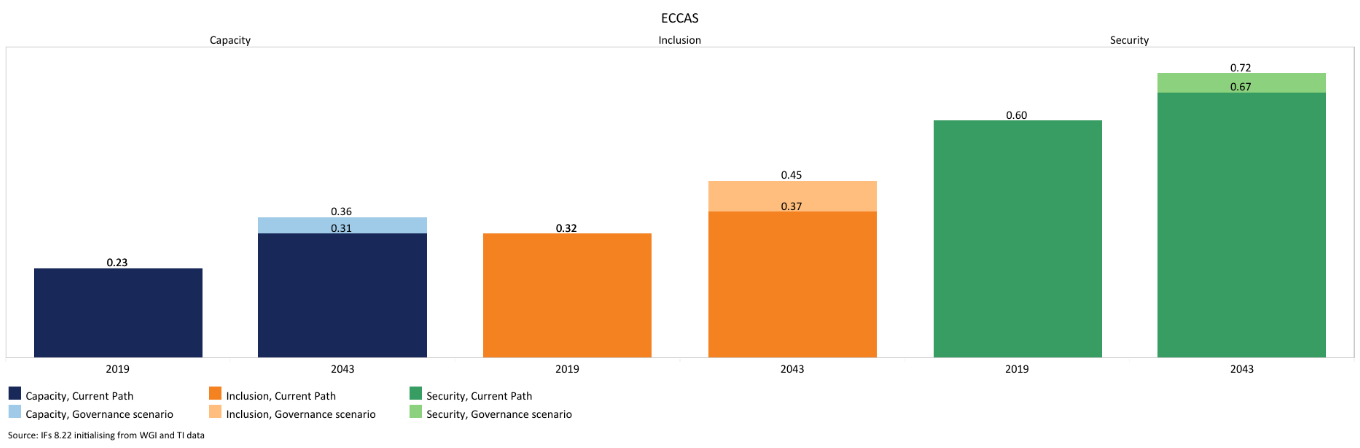


Chart 28 shows the composite governance index in the Current Path compared to the Governance scenario, from 2019 to 2043.

Central Africa is one of Africa's most vulnerable regions, having experienced numerous coups, crises and conflicts since 1990. The region has been plagued by a variety of conflicts, including ethnoreligious clashes, border disputes, civil wars and genocides. Notable examples include the ethnoreligious conflicts between Burundi and Rwanda, the 1994 Rwandan genocide, the struggle for control of Angola's government by three ethnopolitical factions, and the border disputes between Cameroon and Chad.

ECCAS's peace and security architecture, Central African Early Warning Mechanism (MARAC), and Central African Multinational Force (FOMAC) were established in 2004 to address regional threats. MARAC monitors conflicts, while FOMAC is a multinational force for peacekeeping and humanitarian missions. In discharging duties through MARAC and FOMAC, ECCAS is hindered by insufficient intelligence, limited resources, and reliance on external support by the AU and UN. Despite its intended role in addressing conflicts and promoting democracy in Central Africa, ECCAS has been largely ineffective in preventing constitutional changes, ensuring fair elections, or resolving crises.

In 2023, the region scored 0.60 on the Governance Security Index, which was the lowest among the RECs and below Africa's average of 0.68. Gabon, São Tomé and Príncipe and Rwanda had the highest scores (0.77, 0.75 and 0.73, respectively) which indicates relative stability in these nations. Central African Republic, DR Congo and Chad had the lowest scores (0.53, 0.54, and 0.61, respectively) which aligns with these countries' history of political instability.

In the Governance scenario, ECCAS's score on the government security index will improve to 0.72 by 2043, which will be higher than the Current Path of 0.67 and will be slightly below the average of 0.73 for Africa, indicating the region's path towards stability. In this scenario, São Tomé and Príncipe, Gabon and Rwanda still maintain the highest scores, Central African Republic, DR Congo and Chad still maintain the lowest scores. Despite maintaining the lowest scores, Central African Republic and DR Congo will record the largest improvement in the scenario of 0.089 and 0.069, respectively. Republic of Congo (0.014) and Equatorial Guinea (0.019) will have the least improvement in the scenario relative to the Current Path.

ECCAS's 2023 government capacity score of 0.23 lagged behind the African average (0.30) and other RECs. Rwanda, Gabon and the Republic of Congo demonstrated higher capacity (0.41, 0.38, and 0.37, respectively), while Burundi, DR Congo and the Central African Republic struggled (0.15, 0.16 and 0.19, respectively). These scores align with the 2023 Transparency International Corruption Perception Index, where the DR Congo, Burundi and Chad ranked among the lowest (162 out of 180).

In the Governance scenario, the score of ECCAS on the governance capacity index will reach 0.36 by 2043. This will be a 13.7% improvement over the Current Path. Rwanda (0.56), Gabon (0.49) and Angola (0.48) will maintain the highest scores. Burundi (0.29), DR Congo (0.303) and Republic of Congo (0.306) maintain the lowest scores. Notably, São Tomé and Príncipe (0.062), Rwanda (0.063) and the Central African Republic (0.054) will experience the most significant gains; whereas Republic of Congo (0.029) Cameroon (0.040) and Chad (0.041) will see the least improvement.

In July 2020, ECCAS signed a Memorandum of Understanding with UN Women to support the implementation of its Gender Policy and Action Plan. This collaboration aims to harmonise policies and strengthen ECCAS's institutional capacity to promote gender equality and women's empowerment in line with Agenda 2063 and the ECCAS Strategic Plan 2021-2025. Joint efforts will focus on knowledge sharing, capacity building and advocacy, including organising a conference on women's economic empowerment and entrepreneurship in Central Africa.

In 2023, ECCAS had a governance inclusion score of 0.32, below Africa's average of 0.48 and below the average of all the RECs. Within ECCAS, Gabon exhibited the highest governance inclusion score at 0.56 evidenced by the fact that Gabon elected its first female prime minister in July 2020, marking a significant step towards gender equality in the country's leadership. The Central African Republic (0.49) and São Tomé and Príncipe (0.47) followed Gabon. In contrast, the Republic of Congo recorded the lowest score at 0.26, with DR Congo (0.28) and Cameroon (0.33) also showing relatively low levels of governance inclusion.

By 2043, the ECCAS score on government inclusion will reach 0.45 in the Governance scenario, which will be 21% more than the Current Path and 20.3% below Africa's average. Gabon, Central African Republic and São Tomé and Príncipe will continue to have the highest inclusion scores while, Republic of Congo, DR Congo and Cameroon will have the lowest score.

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