The Combined Agenda 2063 scenario consists of the combination of all 11 sectoral scenarios presented above, namely the Stability, Demographics, 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.

Tunisia is moving rapidly through its demographic transition without having achieved the associated benefits that typically accompany high levels of urbanisation, improved health outcomes and high levels of education. Income and overall economic growth have deteriorated and job opportunities in the formal sector are scarce. The impediment, it would seem, is the country’s opaque economic system, which is dominated by strong vested interests that allow little competition and few new opportunities. Despite the impressive human capital outcomes, the Tunisian economy has under-delivered in terms of employment and economic inclusion. As a result, the country finds itself at a crossroad that requires radical but necessary economic and socio-political reforms if it is to achieve inclusive development.

The government faces numerous challenges, not least crafting a coherent development vision amongst the fragmented parties represented in parliament. Tackling the macroeconomic challenges faced in the country will require great understanding, sacrifices and tough decisions by all Tunisians.
When the sectoral scenarios are combined and their impact on GDP per capita is compared, trade, manufacturing, agriculture and leapfrogging make the greatest contribution to additional income for Tunisians.

**Chart 56: GDP per capita in CP and Combined scenario, 2019–2043**

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, whereas Chart 56 presents only GDP per capita in the Current Path forecast and the Combined Agenda 2063 scenario.

The combined impact of all scenarios on GDP per capita yields about US$14 552 over the Current Path’s US$12 840 in 2033. By 2043, per capita income is projected at US$19 086, roughly US$4 763 more than in the Current Path forecast in the same year.
In the Combined Agenda 2063 scenario, by 2043, only about 1.1% of Tunisians will be living in extreme poverty (at the US$3.20 threshold) compared to 5.3% in the Current Path forecast. This represents about 561 000 fewer people living in extreme poverty relative to 710 000 in the Current Path forecast.
See Chart 8 to view the Current Path forecast of the sectoral composition of the economy.

The service industry, already the largest contributor to GDP at 50.4% of GDP in 2019, will further increase its contribution to Tunisia’s economy to 55.4% in 2043. The other sectors are expected to slightly decline in their contribution to GDP, agriculture in particular. However, in absolute dollar terms, all sectors will be larger in the Combined Agenda 2063 scenario in 2043 compared to the Current Path forecast for that year. Services and manufacturing will contribute the largest share to the economy in 2043, which will be followed by ICT, agriculture, energy and materials, respectively.
In this sustained push to implement all the policies, the size of the economy grows by an additional US$15.9 billion, relative to US$77.8 billion in the Current Path forecast by 2033. By 2043, the economy will be a whopping US$151 billion, relative to US$98 billion in the Current Path forecast, representing a 56.4% increase.
There are greater carbon emissions in the Combined Agenda 2063 scenario. The environmental cost in this scenario is that carbon emissions increase by about 22.4% (14.2 million tons) compared to the Current Path forecast at 11.6 million tons of carbon by 2043.
Donors and sponsors

Reuse our work

- All visualizations, data, and text produced by African Futures are completely open access under the Creative Commons BY license. You have the permission to use, distribute, and reproduce these in any medium, provided the source and authors are credited.

- The data produced by third parties and made available by African Futures is subject to the license terms from the original third-party authors. We will always indicate the original source of the data in our documentation, so you should always check the license of any such third-party data before use and redistribution.

- All of our charts can be embedded in any site.

Cite this research

About the authors

Dr Jakkie Cilliers is the ISS’s founder and former executive director. He currently serves as chair of the ISS Board of Trustees and head of the African Futures and Innovation (AFI) programme at the Pretoria office of the Institute. His 2017 best-seller Fate of the Nation addresses South Africa’s futures from political, economic and social perspectives. His three most recent books, Africa First! Igniting a Growth Revolution (March 2020), The Future of Africa: Challenges and Opportunities (April 2021), and Africa Tomorrow: Pathways to Prosperity (June 2022) take a rigorous look at the continent as a whole.

About African Futures & Innovation

Scenarios and forecasting can help Africa identify and respond to opportunities and threats. The work of the African Futures & Innovation (AFI) program at the Institute for Security Studies aims to understand and address a widening gap between indices of wellbeing in Africa and elsewhere in the world. The AFI helps stakeholders understand likely future developments. Research findings and their policy implications are widely disseminated, often in collaboration with in-country partners. Forecasting tools inspire debate and provide insights into possible trajectories that inform planning, prioritisation and effective resource allocation. Africa's future depends on today's choices and actions by governments and their non-governmental and international partners. The AFI provides empirical data that informs short- and medium-term decisions with long-term implications. The AFI enhances Africa's capacity to prepare for and respond to future challenges. The program is headed by Dr Jakkie Cilliers.