

# NEXT

GENERATION NIGERIA

## Nigeria

### The Next Generation Report



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The Next Generation Nigeria Task Force is convened by the British Council Nigeria.

The Task Force is an independent body and the British Council does not necessarily agree with or endorse the views expressed within its reports.

All Task Force members serve in an independent capacity and not as representatives of any organisation.

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1. Nigeria stands on the threshold of what could be the greatest transformation in its history. By 2030, it will be one of the few countries in the world that has young workers in plentiful supply. *Youth, not oil, will be the country's most valuable resource in the twenty-first century.*
2. Nigeria has been struggling against the demographic tide since independence. Rapid population growth has created a huge strain on the country's economic, social and political systems. Today, just 1.2 adults care for each of the country's children and old people.
3. During the past 30 years, the Nigerian economy has stagnated, in sharp contrast to the fortunes of natural comparators such as Indonesia. The 1990s was a lost decade for Nigeria with per capita GDP falling to below 1980 levels.
4. Today, Nigeria's demographic tide is finally turning, as population growth slows and its 'baby boom generation' enters the workforce. By mid-century, depending on how fast family size falls, there could be as much as a whole additional adult to support each child and old person.
5. Nigeria stands ready to collect a substantial demographic dividend. If it continues with recent positive economic growth, improves health standards, and harnesses a growing workforce, *the average Nigerian's income will be as much as three times higher by 2030 and over 30 million people will be lifted out of poverty.*
6. If Nigeria fails to collect its demographic dividend, the seriousness of the country's predicament should not be underestimated. Its prospects will be bleak and could be catastrophic.
7. In the worst case, Nigeria will see: growing numbers of restless young people frustrated by lack of opportunity; increased competition for jobs, land, natural resources, and political patronage; cities that are increasingly unable to cope with the pressures placed on them; ethnic and religious conflict and radicalisation; and a political system discredited by its failure to improve lives.
8. Demography is pushing Nigerian states and regions onto widely different economic trajectories, and could further increase inequality if measures are not taken to promote social cohesion.

9. *Demographic factors are steadily elevating Nigeria's risk of conflict. If Nigeria fails to respond appropriately over the next decade, it could well face a demographic disaster.*
10. Nigeria is currently poorly positioned to maximise the economic opportunities created by its demographics, despite marked improvements in the policy environment over the past decade.
11. At present, health and education standards are low, especially in disadvantaged regions and among the poor. Many young Nigerians are ill-equipped for life in a modern economy. Young women are especially likely to be excluded from opportunities.
12. A shortage of jobs is a serious challenge, with young Nigerians taking many years to become productive contributors to society. *A Nigerian only produces more than he or she consumes for an average of 30 years of their life, compared to 34 years in Indonesia, 35 years in India, and 37 years in China.*
13. Young Nigerians are increasingly frustrated by their lack of opportunities, and there are signs of new movements emerging to campaign for change. The next generation can make a huge contribution to Nigeria's future, but if its potential is not harnessed, it will become an increasingly disruptive force.
14. Nigeria urgently needs to develop a thorough action plan for its next generation. At present, policymakers are faced with a dearth of robust data on the country's future challenges. Better evidence is needed to inform more far-sighted policies.



1. Investment in people must be substantially boosted. The government should set targets for increasing expenditure on education and health, using oil revenues to fund both infrastructure and recurrent spending, while ensuring that existing funds are spent more efficiently.
2. The priorities for education are to develop skills that lead to employment through expansion of vocational training, and to tackle the gross inequalities in educational provision that threaten Nigeria's integrity as a cohesive society.
3. In the health sector, rapid improvements are possible, especially by addressing very high levels of child mortality. Regions with low health standards need emergency funding to build effective primary health systems, with a focus on maternal and child health care.
4. The needs of young families must also be put at the heart of the Nigerian policy agenda. With better health and education, parents will choose to invest more in fewer children, giving those children a much better chance of living a prosperous, secure and fulfilled life. Creating pro-family policies must be a priority for the Nigerian government.
5. Without remedial action, the crisis in the job market will worsen rapidly as growing numbers of young Nigerians enter the workforce. *Nigeria needs to create almost 25 million jobs over the next ten years* if it is to offer work to new entrants, and halve current unemployment.
6. Nigeria needs to develop the infrastructure that will underpin a world class economy, spending up to an additional 4% of GDP on this task. It should diversify away from oil, with an emphasis on sectors that will improve employment prospects for young people, while removing obstacles to economic growth and private enterprise.
7. The oil industry contributes as much as 40% to national GDP, but is highly capital intensive and employs only a tiny fraction of the population. Other industries still in their infancy offer greater potential to Nigeria and Nigerians: communications; manufacturing (textiles, clothing and footwear; automobiles); and the mining of resources other than oil.
8. Nigeria must tap into the energies of the next generation, releasing its innovative and entrepreneurial potential and ensuring that young people have better opportunities for political expression. It should also harness the potential of its diaspora to provide opportunities for the young and for new ideas, investments, and contacts.
9. *With the right policies for the next generation, Nigeria's aspiration to become one of the world's largest 20 economies is within reach.* If Nigeria's leaders make the wrong choices today, the country will suffer the consequences for many decades to come – and Nigeria's development breakthrough could be forever lost.

The Next Generation Task Force was convened to explore Nigeria's future at a time of rapid demographic, social, and economic change.

Over the next 20 years, Nigeria will experience huge growth in the number of young adults in its society. If these young people are healthy, well educated, and find productive employment, they could boost the country's economy and reinvigorate it culturally and politically. If not, they could be a force for instability and social unrest.

The Task Force has undertaken an extensive programme of research. We have completed a comprehensive and unique study of the threats and opportunities presented by Nigeria's changing demography. We conducted two background studies

- A comprehensive literature review, covering Nigeria's geography, resources, regional dynamics, social tensions, government and governance, economy, population, health, and education.
- A series of interviews with Nigerian opinion formers, including politicians, civil society activists, writers, artists, business people, teachers, academics and young adults.

We then commissioned four new research studies, each of which explored different facets of the challenges facing Nigeria and generated the original insights that inform this report. From these studies, the Task Force has published the following papers:<sup>1</sup>

- *Capitalizing on Nigeria's Demographic Dividend*, by Holly Reed, which assesses the peer-reviewed demographic literature on Nigeria, before analysing the two most recent Demographic and Health Surveys for Nigeria (2003 and 2008), and the 2006 census.
- *Population and Economic Progress in Nigeria*, by Andrew Mason, Olanrewaju Olaniyan and Adedoyin Soyibo, which uses new data to provide an assessment of Nigerians' economic lifecycle and offers comparative estimates of public and private investment in human capital.
- *The Politics and Socio-Economic Dynamics of Demography in Nigeria: The Past and Present in the Future*, by Abiodun Alao, which examines the socio-economic situation of Nigeria's youth, including survey data on their attitudes and opinions.
- *Nigeria's Demographic Dividend*, by David Bloom, Jocelyn Finlay, Salal Humair and David Steven. This report provides the first estimates of the size of Nigeria's demographic dividend, and includes new findings in areas that include human capital, population policy, and Nigeria's diaspora.

Finally, we conducted an online survey of 650 Nigerians and held a series of debates across Nigeria.

The Task Force report is intended to catalyse a broader debate on Nigeria's future – and especially the needs of its young people. The next generation is beginning to find its voice. If Nigeria can harness its ideas and energy, then its future will surely be bright.

# TURNING THE TIDE

## THE FUTURE OF A YOUNG COUNTRY



**T**oday, Nigeria stands on the threshold of the greatest transformation in its history. Over the next 20 years, the fundamental nature of its society could alter beyond recognition.

Yet the direction of this change remains profoundly uncertain. Decisions made today will have a critical influence on the path the country takes. In the best case, Nigeria will enjoy a substantial boost to its development, becoming an economic engine not only for the region, but also for the whole of Africa. If the worst happens, it will see a deepening cycle of economic underperformance, social unrest, and even conflict.

The choice between success and failure rests on Nigeria's ability to harness the power of its single greatest asset: not oil, but youth. Although the effective use of Nigeria's vast oil resources is an important part of the story, the oil industry alone will not be able to effectively harness Nigeria's rapidly increasing numbers of young people.

Nigeria is already the world's eighth largest country. By 2030, it will have an additional 68 million people, and will add a further 63 million by 2050 (see box 1), making it the fifth most populous nation in the world after India, China, the United States, and Pakistan.<sup>2</sup> As a result, Nigeria will have a considerable, and growing, global influence.

But this is not simply about raw numbers. The world is ageing quickly. Western countries are already grappling with the burden imposed by their greying societies. Even countries like China are now seeing a decline in the share of working-age people in their population. While a global scarcity of young adults will accelerate in the coming decades, Nigeria will remain a young country throughout most of the twenty-first century.

*As youth becomes an increasingly precious resource, Nigeria will be one of the few large countries in the world that has young adults in plentiful, and growing, supply.*

## AGAINST THE TIDE

Throughout its history, Nigeria has battled against exceptionally tough demographic conditions. The numbers tell a clear story. Fifty years ago, at independence, there were just 45 million Nigerians. Today its population has more than trebled, topping 158 million.<sup>3</sup>

Such rapid growth places enormous strains on any society. In Nigeria, fertility rose through the first quarter century after independence, with each woman bearing an average of seven children in the mid-1980s.<sup>4</sup> During this period, infant mortality, while still shockingly high, was falling. The result was unsurprising: growing numbers of large families faced a constant struggle to subsist.

Today, over 40% of Nigerians are under fifteen, while 3% are over retirement age.<sup>5</sup> That means there is only slightly more than one adult of working age available to take care of each dependent in the population, a ratio that worsened after independence and is now barely higher than it was in 1960.

Any country with so few working age adults and so many children is likely to find economic progress exceedingly difficult to achieve. Throughout the post-independence period, Nigerians have devoted substantial resources to feeding, clothing, housing, educating, and securing the health of their children. This has come at a significant short-term cost, diverting funds that could have been used to construct factories, invest in infrastructure, or build the institutions needed to support a modern economy. Nigeria's post-independence generation has sacrificed its own prospects in order to make a substantial investment in their children's survival.

The economic impact has been predictable. Between 1980 and 2006, Nigeria's economy barely kept up with its surging population, with incomes barely higher today than they were 30 years ago.<sup>6</sup> Over the past generation, Nigeria has fallen far behind its international competitors, most of whom have enjoyed much more favourable demographic conditions during this period (see box 2).

Demography is clearly not the only factor in Nigeria's underwhelming economic performance over the past 50 years. Better education, healthcare, and governance would have all helped the country grow faster, but providing these services was complicated by rapid population growth.

*Nigeria has been struggling against a powerful demographic tide ever since independence.*

## CROSSING THE THRESHOLD

Today, this demographic tide is finally turning in Nigeria's favour. For half a century, Nigeria may have faced tough demographic conditions, but over the next 50 years, demography will begin to work in its favour. This will provide the country with opportunities on a scale that few richer countries can look forward to.

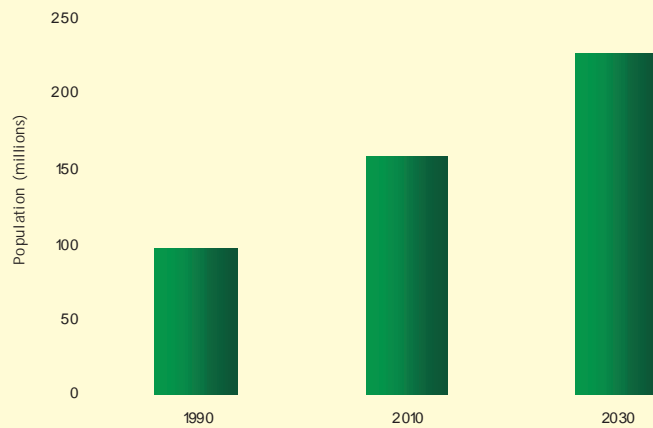
The drivers of change are easy to understand. For a generation now, Nigerian women have been choosing to have fewer children, following a pattern seen in countries across the world as they develop (though current levels of fertility in Nigeria are still relatively high).<sup>7</sup> As health standards improve, babies have a much greater chance of surviving to adulthood. For a while, family size grows rapidly, but parents soon adjust, choosing to focus their energies and resources on ensuring that a smaller number of children have the chance of a better life.

While Nigeria's population is still growing, it is doing so more slowly than at any time since independence and the proportion of children in the population is finally beginning to drop. At the same time, a large 'baby boom' generation is now entering the workforce. The net result is that there are now more adults available to support each child in the population. Depending on how fast fertility rates drop, by mid-century there could be as many as one extra adult Nigerian for every child. This change has the potential to provide a substantial economic boost.

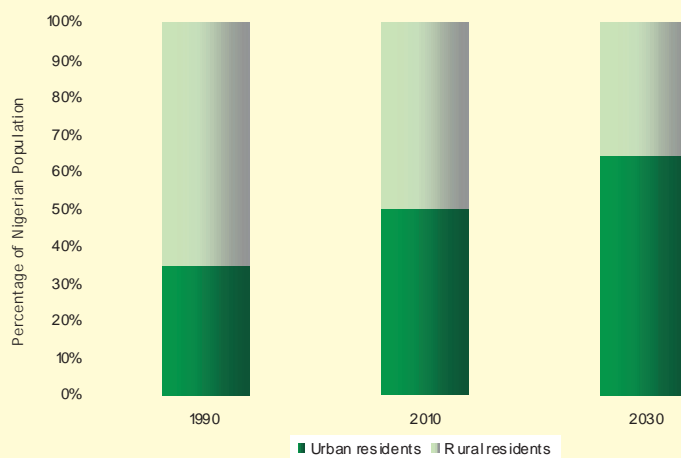
However, Nigeria will not collect this demographic dividend automatically. If the country fails to enact the right policies to capitalise on its one-off demographic opportunity, its future could be much bleaker even than the present. Judging the future by the past, wrong choices could seriously worsen the country's current situation.

*Nigerian policymakers must turn their attention to understanding and exploiting the country's demographic window of opportunity, or risk dramatic and long-term consequences*

## The Changing Face of Nigeria



Nigeria's population has grown by 60 million in 20 years. There will be almost 70 million *more* Nigerians by 2030.

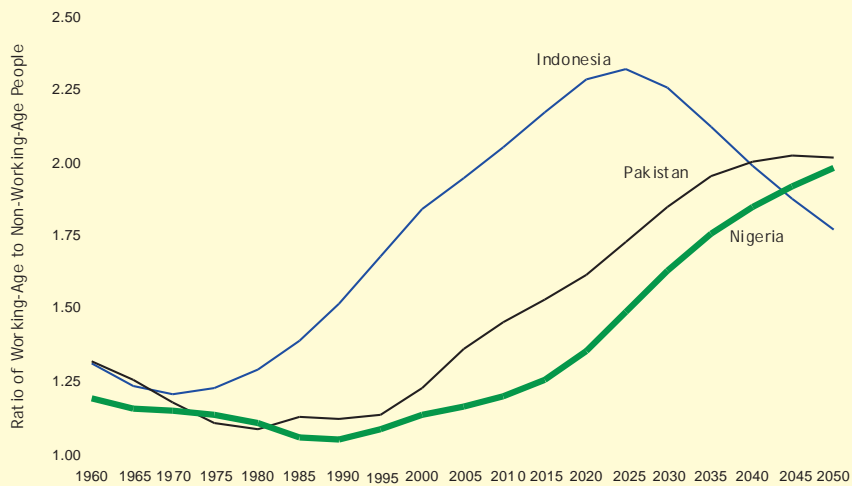


Nigeria is an increasingly urban country; virtually all its population growth is in its towns and cities.

Sources: UN DESA World Population Prospects (2008 revision) and UN DESA World Urbanisation Prospects (2007 revision)

Box 1

## Contrasting Fortunes



In 1980, Nigeria was considerably richer than both Indonesia and Pakistan.

Since then, Pakistan's economy has grown at 2.5% per year and Indonesia's by 3.6%, while Nigeria's has barely grown at all.

GDP per capita in Pakistan is now 50% higher than Nigeria's, while Indonesians earn twice as much as Nigerians.

But both countries – and Indonesia in particular – have enjoyed much more favourable demographic conditions than Nigeria (see graph).

In the next twenty years this will begin to change, offering hope for Nigerians of a new era of sustained growth.

Source: UN DESA World Population Prospects (2008 Revision)

Box 2





## DIVIDEND OR DISASTER UNDERSTANDING NIGERIA'S DEMOGRAPHIC CHOICES

Over the past 50 years, many countries have experienced similar demographic challenges to the ones that now face Nigeria. Our analysis draws on this international experience, providing a strong base of evidence on which effective policies can be built.

The demographic dividend is a concept that is well understood by economists. The window of opportunity opens as fertility and youth dependency decline, and the working age share of the population rises. The East Asian countries saw a sharp increase in the number of young adults in the workforce from the mid-1970s onwards, a period that coincided with the region's economic 'miracle'. One third of growth in this period can be directly attributed to the favourable demographic conditions the region was experiencing at the time.<sup>8</sup>

But demography is not destiny. Countries can only collect their dividend if young workers are healthy, adequately educated, and able to find productive employment. Robust financial markets help too, allowing adults to save for their retirement while generating the capital that can provide a further boost to growth. All this requires an effective government, a strong society, and relatively high levels of peace and security.

If these factors are not in place, a country will miss its opportunity. The damage may be subtle at first, with decades of underperformance followed by crisis as the baby boom generation reaches retirement.

The results may also be much more dramatic, as large cohorts of unemployed or underemployed young people destabilise their societies, fuelling crime and creating conditions where civil conflict becomes more likely. Instead of collecting a dividend, a country that is not well prepared to make the most of its baby boom generation can find itself in the midst of a demographic disaster.

In this report, we quantify – for the first time – the size of the demographic dividend on offer to Nigeria, while explaining the seriousness of the demographic risks the country faces.





## THE UPSIDE

During the current decade, Nigeria's economy has experienced relatively robust growth, with annual per capita income growth far outstripping its historical performance by most measures.

Assuming Nigeria maintains this growth, Nigerians would see significant improvements in their standard of living. By 2020, the average Nigerian could expect to have 48% more income than today.<sup>9</sup> By 2030, his or her income would have more than doubled.<sup>10</sup> Such a sustained period of growth would have a transformational impact on the lives of ordinary Nigerians.

But demographic conditions mean there is the potential for Nigeria to significantly accelerate the transformation of its economy. Task Force research has modelled a scenario that includes two economic drivers that are at the heart of the demographic dividend: an expanding labour force and steady improvements in life expectancy (see box 3). Their impact on Nigeria's prospects is substantial:<sup>11</sup>

- Average annual incomes increase from ₦311,224 today (\$2,070) to ₦516,452 in 2020 (\$3,435) and ₦884,359 in 2030 (\$5,882).<sup>12</sup>
- 31.8 million people are taken out of poverty by 2030, showing the potential of the demographic dividend to transform lives.<sup>13</sup>

Moreover, our research suggests that the dividend could be larger if its effects are augmented and supported by much-needed investment in human and social capital. At 48 years, life expectancy in Nigeria is still shockingly low and is projected to increase only to 56 years by 2030.<sup>14</sup> We explore what would happen if health improvements raised life expectancy to the current developing-country (excluding China) average of 64 years by 2030, which would correspond to Nigeria achieving a significant degree of catch-up by 2030 to income-adjusted global health standards. We also look at the impact of steady improvements to Nigeria's institutions, where the country continues to lag well behind international standards on indicators including corruption, rule of law, and public sector efficiency.

Again the results are striking. Although the impact of better health and institutions looks modest in percentage terms, adding about two percent to per capita GDP in 2030, its true impact is in terms of lives, bringing another 2.3 million people out of poverty.<sup>15</sup>

Over the next generation, Nigeria's demographic wave could bring huge benefits to its citizens – halving poverty and nearly trebling per capita incomes in a generation.



## THE DOWNSIDE

Unfortunately, at the same time as Nigeria's opportunities are increasing, its risks are multiplying.

Demographic change does not take place in the background. It heralds a profound and deep-seated transformation to all facets of a society, and many of these changes are already being felt in Nigeria. In 1960, fewer than 7 million people (17% of the population) lived in the country's towns and cities. Today, Nigeria is half urban, half rural. Over the next 20 years, the urban population will almost double, increasing by 65 million (64% of the population, see box 1).<sup>16</sup>

Nigeria's urban centres are very different in character from its traditional villages. Kinship structures are weaker and families are smaller. Young people – especially those in cities – tend to have very different attitudes and expectations than their parents – and the sheer size of the new generation ensures that it will be an influential, and potentially disruptive, force.

These social and cultural changes are unsettling, but they can have a positive impact with certain conditions in place. Young urban countries can be powerful engines for innovation, but only if the society is sufficiently robust to adapt to new pressures and demands. Weak states, with stagnant economies, are more likely to find themselves overwhelmed by the demands placed on them, leading to a vicious cycle of failure and decay.

In the worst case, Nigeria will find that:

- Growing numbers of young people are frustrated by a lack of employment opportunity.
- Competition for jobs, land, natural resources and political patronage fuels violent conflict between groups.
- This unrest is exacerbated by the growing impact of climate change on weather patterns, water and other resource availability, and agricultural productivity.
- Cities lack the resources to cope with the speed of their growth and become increasingly dysfunctional and lawless.
- The political leadership and democratic system as a whole are discredited, setting the scene for state failure.

These are not speculative concerns. Countries become increasingly vulnerable to civil conflict as they face the demographic conditions that Nigeria is now experiencing (see box 4).

Furthermore, strong economic performance cannot be taken for granted. Should Nigeria slip back onto the economic trajectory it experienced during the 'lost decade' of the 1990s, the average Nigerian will actually be economically worse off by 2030.<sup>17</sup> Unemployment will remain dangerously high and young people, in particular, will be left idle and prone to unrest. The risk of crisis will quickly rise, possibly to critical levels.

If Nigeria fails to collect its demographic dividend, the seriousness of the country's predicament should not be underestimated. Its prospects will be bleak, and could be catastrophic.

## ON A KNIFE EDGE

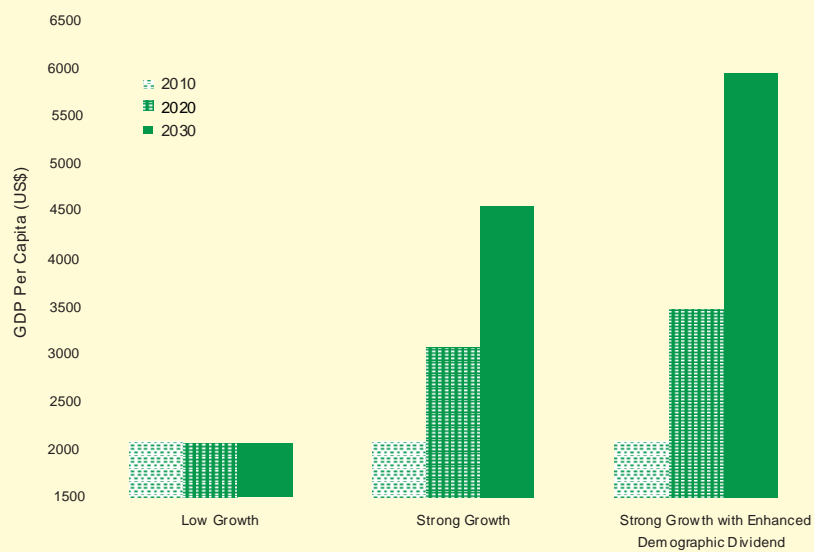
Our research demonstrates clearly that Nigeria is balanced on a knife edge between demographic dividend and disaster.

The opportunity is an enticing one. Nigeria's vision is to be one of the world's top 20 economies by 2020, and to demonstrate sustained regional and global leadership. The Task Force's work shows that this objective is indeed within reach, but only if the country fully exploits its now-or-never demographic opportunity. Inaction puts Nigeria at risk of becoming over-burdened and facing further decades of economic stagnation.

The opportunity and risks have quite different characteristics. The path to growth is long and will require many decades of farsighted and effective stewardship. Social unrest will strangle the economy, while conflict could destroy a generation of progress in little more than the blink of an eye.

These are not long term concerns. The demographic window is beginning to open now. Nigeria must act urgently to prepare itself for its new demographic challenges.

## Economic Scenarios for 2030



Nigerians will enjoy a much brighter future if the country can continue to grow at the rate seen in the current decade (strong growth) but reversion to the stagnation of the 1990s would be disastrous (low growth).

The demographic dividend, enhanced by further health improvements and better governance, offers a substantial additional boost to the Nigerian economy (strong growth with an enhanced demographic dividend).

Box 3

## Demography and Conflict

Research by Population Action International explores why countries experiencing a demographic transition are at an increased risk of conflict:

*Why are youth bulges so often volatile? The short answer is: too many young men with not enough to do. When a population as a whole is growing, ever larger numbers of young males come of age each year, ready for work, in search of respect from their male peers and elders.*

Young men commit three-quarters of the world's crimes. They are also at the heart of any war, whether as part of a regular army or an insurgent force. Competition for scarce resources intensifies the pressures that lead to violent conflict.

The research identifies four demographic factors that fuel civil conflict:

- A high proportion of young people in the population.
- Rapid rates of urbanisation.
- Competition for scarce cropland.
- Competition for scarce freshwater.

Each of these factors has the potential to increase the risk of conflict by between 150-200%, while a high death rate among adults (as is common in countries like Nigeria with a serious AIDS epidemic) also appears likely to increase a country's vulnerability.

According to the authors:

*Key demographic characteristics that increase the risk of civil conflict interact with each other and non-demographic factors, compounding net risk for countries in the early or middle phases of demographic transition.*

*Multiple demographic stress factors tend to exacerbate each others' effects, expose more of a population and more geographic areas to tensions, and test developing-country governments with complex challenges.*

Source: Population Action International

Box 4<sup>18</sup>



## READY FOR THE FUTURE CAN NIGERIA COLLECT ITS DIVIDEND?



Societies that maximise their demographic opportunities share a number of characteristics.

Most importantly, they provide quality education and healthcare for their children, and create sufficient jobs for young people entering the workforce. These accomplishments require sound economic policies and consistent investment in human capital. Unfortunately, Nigeria lags behind benchmarks established by a set of reasonable comparison countries, both within and outside of sub-Saharan Africa. Without significant and rapid improvements in its priorities and policies, Nigeria is highly unlikely to collect its demographic dividend in full.

However, recent years have seen encouraging signs of an upturn, offering hope for the future and creating a platform for the development of more effective policies. Nigeria now needs to create a reinforcing cycle of improved living standards, better health and education, and stronger and more effective governance. Increased national confidence – and the unity that this brings – will play a vital role in Nigeria's future.

Policy will need to be balanced between short and long term action. Over the next decade, Nigeria must develop a framework that can strengthen its business competitiveness over the entire period of its demographic dividend. Nigeria must also implement remedial measures to increase opportunities for the current generation of young people. Nigeria is a vastly diverse country, with a pressing need to build a cohesive and well-integrated society. For this reason, attention must be directed to the country's many poor and marginalised groups, ensuring that they can have an increased stake in the country's future.

Nigeria is fortunate to have many resources available to advance its economic improvement. Its oil is expected to last for around another 30 years, a period in which global demand and prices will increase significantly. Other industries offer greater potential for sustained growth and improved equality within Nigeria. The communications industry in Nigeria is growing quickly, and manufacturing of cars and textiles can be expanded with the willing manpower standing by.



Mining of resources other than oil in Nigeria is underdeveloped, but has the potential to contribute to a boom in this economy. Diversifying away from oil and creating jobs in these infant industries – communications, manufacturing and mineral resources – will create wealth and better equality for the baby boom generation.

By investing the wealth generated from oil in the future, Nigeria can kick start the much-needed diversification of its economy and prepare itself for a period when it will no longer be able to rely on oil.

Policymakers need to combine a forthright analysis of how prepared Nigeria is to collect its dividend, with a bold vision of what steps it can take to maximise its opportunities.

## HEALTH AND EDUCATION

Nigeria's performance on human development indicators remains poor, with health standards posing a sizeable obstacle to the country's development.

Nigerians do not live very long by international standards, with the country ranking 167<sup>th</sup> out of 176 countries in life expectancy.<sup>19</sup> One in six Nigerians die before their fifth birthday, an enormous loss of human potential and a barrier to the completion of Nigeria's demographic transition.<sup>20</sup> For those who survive, ill-health leads to poor performance in school and in the workplace, with Nigeria's health system rated as one of the worst in the world.<sup>21</sup> Unless health standards improve dramatically, Nigeria has little chance of fulfilling its potential over the coming decades.

A close analysis of Nigeria's education system reveals a nuanced picture. On average, young people have greater educational attainment than their parents. The fraction of students enrolled in primary school (a figure that includes students older than what is generally considered primary-school age) has hovered around 95% for the past decade; the corresponding figures for secondary and tertiary education are about 30% and 10%, respectively.<sup>22</sup> By contrast, only about half of Nigerians in their mid-forties have had any education at all.<sup>23</sup>

But these figures hide deeper problems. The education that most Nigerians receive is of dubious quality, and illiteracy remains high, even among those who attend school. Only 45% of primary school children in urban areas and 19% in rural areas can read a simple sentence. Large numbers of children are regularly absent from school and must repeat years. Many teachers lack the skills to do their jobs, while essential equipment, such as textbooks, is in short supply.

There are also marked disparities in access to education. Nigerian boys spend an average of nine years in school, but girls spend just seven years.<sup>24</sup>





Nigerian Muslims are much more likely to be excluded from education than Christians, with half having no schooling at all. There is also a pronounced North-South divide, which shows little sign of narrowing.

In part, these problems reflect the strains imposed by the rapid increase in the number of children needing education, but there has also been a clear failure by the government to invest in both education and health (see box 5). As Nigeria's population matures, demand for education will increase much less quickly – providing an opportunity to move towards universal access to basic and secondary school, while simultaneously driving standards up towards international benchmarks.

Most ordinary Nigerians are investing as much in their children as they can afford – the government needs to take a greater share of the burden if education and health standards are to improve.

## JOBS, JOBS, JOBS

Nigeria's failure to generate sufficient jobs for its growing workforce is a cause for deep concern.

Roughly three in ten Nigerians are currently unemployed, with unemployment and underemployment a particular problem for younger people. It is only when a Nigerian passes the age of 30 that unemployment levels drop below 25%.<sup>25</sup>

Another striking sign of failure in the labour market can be seen in the inability of many educated Nigerians to find productive work, a problem that appears to be worsening. Three in ten graduates of higher education are not working, and nearly as many of those who have completed secondary education are unemployed.<sup>26</sup> A highly educated Nigerian is not significantly more likely to find work than one with no education at all. Many are also forced to accept jobs that do not use their qualifications to the full. The proportion of graduates in technical and professional jobs is falling. Many educated men and women can only find marginal employment in sales, agriculture, or manual labour. Brain drain has resulted in massive numbers of Nigerians leaving the country to seek employment abroad.<sup>27</sup>

We have created a model of Nigeria's 'economic lifecycle' (see box 6), which shows that consumption steadily increases throughout childhood before reaching a plateau in the mid-twenties. Very young children are wholly dependent on adults to provide for them, with the average Nigerian not becoming economically productive until the late teens. Even after becoming economically productive, an average Nigerian does not generate more labour income than her or his individual consumption until 32 years of age, when she or he becomes a net contributor to society.<sup>28</sup>

Nigerians thus leave themselves just 30 years in which they produce surplus income that they can spend on their own families, invest in businesses, save for their retirements, or contribute to the taxes needed to build a strong society. This is in marked contrast to comparator countries.



The average Indonesian is a net contributor for 34 years, an Indian for 35 years, and a Chinese adult for 37 years. That translates into a substantial difference in a person's net lifetime contribution.<sup>29</sup>

Furthermore, the surplus produced by Nigerian workers is not sufficient to meet the needs of children and old people. Indeed, only 28% of the life-cycle deficit is funded by income earned in the domestic labour market<sup>30</sup> The rest is funded by income from assets and natural resources, remittances from Nigerians overseas, development funding from other governments, and from debt. Nigeria, in other words, is living unsustainably beyond its means.

The need for jobs will continue to become more pressing with every passing year, as growing numbers of baby boomers enter the workforce. Increased educational requirements will also mean growing demand for skilled opportunities. We calculate that Nigeria will need to create 15 million new jobs over the next ten years just to keep employment at current levels. If Nigeria aims to halve unemployment, it will need to create 24 million new jobs, expanding the labour market by almost 50%. If unemployment is to be brought to 7% by 2030, the labour market needs to nearly double in size, creating almost 50 million jobs.

Clearly there is a crisis in Nigeria's labour market – and this could worsen rapidly. Young Nigerians desperately need access to better jobs.

## THE REGIONAL DYNAMIC

Nigeria's highly diverse society compounds its demographic challenges, with vast regional differences encompassing language, religion, income, and education.

Demography has the potential to exacerbate divisions, with the demographic transition underway at different speeds in different parts of the country, and among various social groups. The Task Force has compared the rate of demographic change across Nigeria's states, using data from the 1991 and 2006 censuses.

In 1991, there was relatively little difference in the share of working age adults in the population of any state, with Lagos having the lowest and Kaduna the highest proportion. By 2006, however, the positions were reversed, with Lagos having almost two adults for every dependent, and Kaduna having just one. Two thirds of states had, like Lagos, seen their demographic conditions improve markedly in that period. The rest had, like Kaduna, experienced much less favourable demography.

These discrepancies will continue to widen over the next 20 years, with regions and states experiencing different stages of the demographic cycle. There also exists a religious divide, with the small numbers of people who hold traditionalist religious beliefs continuing to have very high fertility, Christians tending to have smaller families, and Muslims somewhere in between. The uneducated and poor are also unlikely to have completed the demographic transition, resulting in parents continuing to stretch limited resources over larger numbers of children.

In the worst case, demographic forces could have a disastrous impact on Nigeria's social cohesion, as regions and states with favourable demography increasingly diverge from those who are still battling against the demographic tide. Richer states, however, cannot be sure that they will be able to insulate themselves from demographic disaster in other parts of the country. Radicalisation and conflict in one part of Nigeria could quickly have a serious impact on the prospects of Nigerians throughout the country.

For this and many other reasons, solidarity between regions, states, and social groups will be essential. States experiencing favorable demographic conditions could prove sufficiently economically buoyant to support those that still have high dependency ratios, absorbing surplus labour through migration, providing wealth for investment in infrastructure and human capital, and supporting the development of more robust institutions at the federal level. Social protection policy could be a key instrument for promoting human security, a stronger sense of hope, and a greater stake in Nigeria's future.

Demographic forces seem certain to challenge social cohesion in Nigeria. The country's future rests on policies that prevent the current divide from widening.

## THE HUMAN FACTOR

On its human capital indicators, Nigeria still resembles a very poor country, not an emerging economic power.

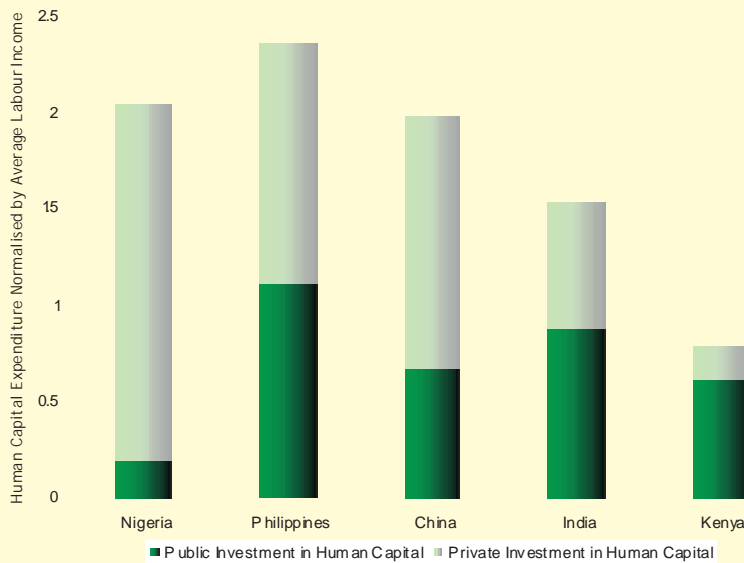
As things stand, health will certainly hold back Nigeria's demographic transition. The country's future lies in parents investing more in the future of smaller families. This will not happen in poor communities, where so many children fail to survive to maturity.

Nigeria's education system, while improving, is not fit for the demands of competitive global markets. There are clear signs that it is not providing Nigerians with the skills they need to get jobs. A significant part of Nigeria's educational investment is failing to provide a proper return.

Most of all young Nigerians need jobs. Unemployment is the scourge of Nigeria's youth. Without a proper job, a young adult has little chance of building a better life. The next generation is left little stake in Nigeria's future.



## A Failure to Invest in the Future



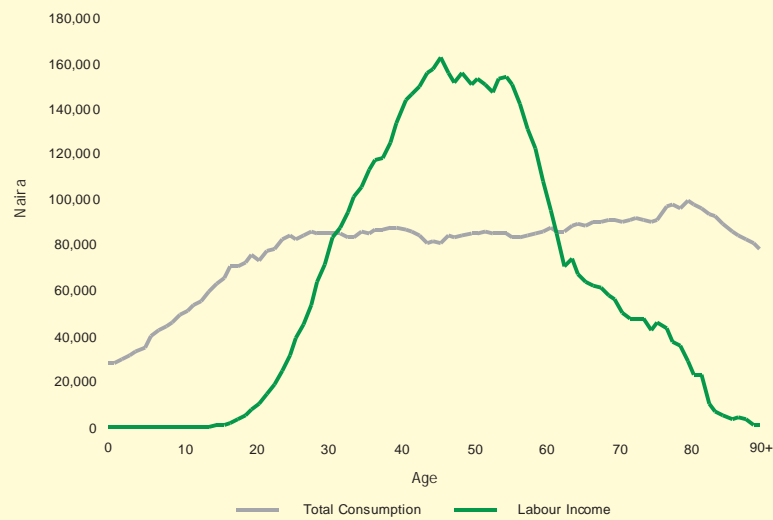
90% of investment in education and health comes from private expenditure, and only 10% from the government.

Nigeria ranks last of 24 countries for its investment in human capital. When controlled for income, the government spends less than a third of the investment made in Kenya, China, India and the Philippines.

Source: Lee, R., Mason, A. 2009a. "Low Fertility, Human Capital, and Macroeconomics", in European Journal on Population. (Updated to include Nigeria)

Box 5

## Nigeria's Lost Potential



Many of Nigeria's young people are locked out of the labour market and don't start to generate wealth until relatively late in life.

This leaves just thirty years in which they are net contributors to society—seven years less than their counterparts in China.

Source: Soyibo, Adedoyin (2009), *Managing Research and Innovation for National Development*

Box 6

## CHAMPING AT THE BIT NIGERIA IN ITS OWN WORDS



Nigerians themselves are, of course, acutely aware of the problems their society faces. A 2010 Pew Global Attitudes Survey found that just 23% are satisfied with the country's direction.<sup>31</sup> Talk to Nigerians and you will find a highly politicised populace that is eager for change.

Young Nigerians are especially restless. They think that radical improvement is needed across Nigerian society. They are dissatisfied with both the quantity and the quality of education, feeling that it does not prepare them for the workplace. They are worried about the deepening divides between north and south, Muslim and Christian, rich and poor, and men and women. And they do not think that they are fairly treated when they look for jobs.

At the same time, the next generation does not feel empowered to make change happen. Although young people are desperate to get involved in efforts to improve their country, many feel that the older generation is excluding them. Unable to express themselves through formal channels, some have turned to more destructive protest, as shown through the troubles in the middle belt of the country and the Niger Delta.



So what exactly does the next generation think about its prospects for realising its aspirations? Task Force research explored the attitudes, hopes and fears of young people from across Nigeria, providing a picture of how the country's youth are faring currently, and how prepared they are to overcome the challenges and grasp the opportunities of the future.

## THE CHALLENGE AHEAD

Our research comprised three elements:

- The first was an online survey<sup>32</sup> of 650 Nigerians from across the country . Of those that completed the survey, 63% were male, and 39% were married. 12% were under age 18, 21% were between 18 and 25, with the remainder aged 26 or over.
- The second was a series of debates in Abuja, Kano, Lagos, Port Harcourt and Enugu.
- And the third consisted of 56 in-country interviews by the Next Generation secretariat with future leaders, including politicians, civil society activists, writers, artists, business people, teachers, academics and students.

Our intention was not to conduct a representative survey, but to provide an opportunity for Nigerians to contribute their views to the Task Force. This consultation exercise provided an insight into the feelings of those who aspire to drive change in Nigeria.

The young Nigerians with whom we spoke are highly dissatisfied with the state of their country. And when asked to gauge their level of satisfaction with the way things are going in Nigeria today, 85% of our broader group of survey respondents were 'dissatisfied.' Over half believe rising population will lead to conflict.

The problems identified by the next generation start early in life. A group of young people working on a donor-funded project on reproductive health, who were interviewed by the Next Generation secretariat, spoke of the country's high infant and maternal mortality, which they attributed to the dearth of health services for mothers and children.



They noted that basic immunisation is absent in many areas, with rates as low as 20% in some rural districts in the north. They warned of the spread of HIV/AIDS, which flourishes because of low usage of condoms and low awareness of reproductive health among young Nigerians. And they observed that the weakness of primary public health care services is forcing many to turn to the unregulated private sector, where quality control is weak and quacks abound.

Education, as we noted earlier in the report, is a further key area of concern. When asked if the current education system provides skills relevant to employment opportunities, over 70% said no. A young politician in Kano told the secretariat that children educated in the 1970s received a much better education than today's students.

There are problems at all levels of education, with serious deficiencies in both quantity and quality of schooling. One young NGO activist told the Task Force that "the public school system is in a terrible state, full of poor, de-motivated teachers who strike every other week because the government doesn't listen to them, because politicians' own children are in private schools." In a Lagos primary school we visited, there was no functioning toilet and no drinking water for the 290 pupils. Asked what they felt was needed to improve their school, the young students listed basic facilities such as water, a toilet, comfortable chairs, fans and general maintenance to buildings. University students in Kano also mentioned the lack of chairs, which meant some had to stand for hours in sweltering heat to listen to lectures. "People get too tired and hot to listen or take notes," one student said.

It is not only in schools where teachers are underperforming. Universities, which are supposed to be the flagships of an education system, are failing to equip graduates with the skills they need. "There are lots of bad universities because the emphasis is on quantity, not quality," said a professor in Lagos. "A lot of universities are glorified secondary schools," added an NGO activist in Abuja, "[and] the products of university education cannot even put a couple of sentences together." A student in Kano, meanwhile, remarked that "teachers' colleges are absolutely corrupt – people can buy a certificate of education without even attending class."

Options for those who cannot attend universities are limited. "There used to be functioning technical schools," observed a journalist in Lagos, "but now they are moribund." Many believe there needs to be an attitudinal shift so that vocational schooling, which is so vital for producing employable graduates, will be viewed in a more positive light. A young businesswoman in Lagos pointed out that "not everyone is university material – you can do vocational training instead and it should not be looked down on." Such a shift can only occur if vocational schools receive investment.

Infrastructure is a further area of concern to young Nigerians. Many of those interviewed lamented the state of the country's roads, and in particular the neglect of roads in rural areas, which, along with the absence of investment in irrigation and fertilisers, has made farming an unattractive vocation. The lack of electricity, moreover, is seen as a great impediment to business and to job creation. A contractor for Shell told us that "24-hour power would enable manufacturing companies to stay open all day, and instead of one shift you could have three. This would triple the number of employees in some firms." For many young Nigerians, the cost of generators makes it impossible to set up businesses and forces them to resort to selling their wares in the street.

When asked to rate the gravity of access to employment, 86% of online survey respondents view it as a very serious problem. The lack of education and infrastructure contribute to the lack of jobs, but corruption and nepotism are further impediments. A young human rights activist reported that "you get the wrong people in the wrong jobs because people help their relatives, not those who have the right skills." A teacher in Kano said that "if you don't belong to the leaders' circles it's hard to get a job. There are no jobs for the common man." There was a widespread feeling that being young excludes you from job opportunities. At a debate in Abuja, one young participant complained that "there are a lot of old people in jobs who keep on being recycled. If this continues the good jobs will continue to elude the young people."

### LISTEN TO US!

Most of the young people we talked to believe that the next generation can bring positive change to Nigeria. Currently, however, there are few outlets for that voice. "Youth are not seen by our leaders," said a focus group participant in Abuja. "Do we feel that our energy and potential are put to effective use?" asked another: "The answer is no."

While some of the young adults with whom we spoke were positive about the potential for change, they are in the minority and most believe that their voice is systematically stifled from an early age. In schools, they have little say in how they are educated. A human rights activist in Lagos told the secretariat that while at university, his entire class had to repeat a semester because a group of students had complained about the poor quality of teaching. "The right to a fair hearing in schools does not exist," he said. "The authorities don't listen or they fail you if you complain."

Girls and young women have particular difficulties in making themselves heard. When asked if women could play an increasingly important role in the development of Nigeria, almost 80% of our survey respondents said yes, suggesting that many feel women's potential is untapped.



Strengthening women's basic rights is an important first step to equality. A number of human rights activists with whom we spoke to highlighted the problems girls have in reporting abuse or accessing health care services. A representative from the reproductive health project told us that "a young girl who is raped doesn't voice it because of stigma and because if she does she will get harassed in court or in hospital." A female UNICEF employee argued that "there is a culture of silence, where women don't talk about exploitation." Moreover, women's representation in public life is limited. Young women who spoke to the secretariat pointed out the small proportion of female members of parliament and argued that gender equality is too low on the country's leaders' list of priorities.

In general, the young people we consulted feel alienated, although there is a great desire among the next generation for more political participation. Two thirds of the Nigerians we surveyed plan to vote in the next election, while one focus group participant in Abuja summed up the views of many of his peers by arguing that "we need to bridge the generation gap, to have cooperation between the older and younger generations, because we are the ones who will take over tomorrow. So we need respect."

This cooperation is not happening. Instead, as another focus group member observed, "politicians say the youth are the future etc. but they don't want to leave their seat until they have grey hair...that is not how to give youth a chance." The problem is both attitudinal and structural. The older generation either sees little value in, or feels threatened by, youth involvement. "Nobody thinks of Nigeria in ten years time," said a Lagos television presenter. "Everyone thinks of what he or she can get now." An activist in Kano told us that "political godfathers have to allow you in – if you stick your neck out and challenge them you are in trouble. People like me who want to solve society's problems are not welcomed."

Structurally, the systems are not in place to involve young people. An NGO worker near Lagos described the status quo:

*There is a hierarchical and political system that oppresses the opinion of youth. The leadership is not at all representative of the country in terms of its age. The traditional system which is still in place muzzles the youth, so it's very difficult for the sentiments of people below the age of forty to be heard. Youth are seen as a separate group, not an integral part of national issues or the policy process. Very few young people are involved in decision-making.*

Furthermore, young people who decide to become politically active will face practical difficulties including having to deal with the endemic practices of bribery and kick-backs that characterise the Nigerian political system.

A university student we spoke to in Kano would like to go into politics after he graduates but believes he will be thwarted by his inability to pay the bribes needed to work his way up through a political party and the costs of an election campaign. "I need a good job first to be able to afford it," he explained. "Or if someone sponsors me instead I will have to reward him with contracts later." Several young people we consulted argued for a fairer democratic system, "where it's not all about money."

The price of continuing to ignore the young may be high. None of the university students we spoke to in Kano voted in the last election, for they saw it as a waste of time. "It is better to sleep at home," said one. "Nothing changes if you vote."

## A FORCE FOR GOOD

"The young must be consulted. Youth must be mainstreamed in all policy decisions," said a young focus group participant in Abuja. Her words hint at what needs to be done if the next generation is to be harnessed as a force for positive rather than negative change.

It is encouraging that those we consulted expressed a clear opinion that all is far from lost for Nigeria, and that it is not too late to change course. Indeed, many young people think that the right policies are often already in place, but that implementation lags behind. Another member of the Abuja focus group said that "our problem here is not the lack of good ideas but the lack of follow-up." The Child Rights Act and the Youth Policy, for example, have yet to be fully implemented.



Compulsory basic education for all has not been achieved. And the National Youth Service Corps is prevented from realising its potential by a lack of investment and political will on the part of policy-makers.

For Nigeria to benefit from leaders who will both develop and implement a vision for change, investment in the young by government is seen as essential. Education, our interviewees thought, will encourage people to make demands on their leaders and to peacefully and constructively agitate for change.

Civic education in particular, according to a number of focus group participants, was welcomed insofar as it could help instil national pride and the idea of service.

Nigerians today do not have a strong sense of nationhood – in our online survey, roughly half of respondents aligned their identity with their religion, compared with only a quarter who thought of themselves primarily in terms of their nationality.

A clearer sense of the rights and responsibilities of Nigerian citizens can only be developed if civic education begins at an early age.

If the government commits to greater investment in education, two areas are seen as key. The first is teacher training and pay. The new curriculum will be ineffective if teachers are not equipped to deliver it. Higher salaries will prevent strikes and encourage more motivated people to move into the profession, while continuing education can reinvigorate teachers. As a young journalist in Abuja commented, the recent strikes by university lecturers were not just about pay but also a demand for more exchange programmes, better equipment and more research funding.

The second area for investment is vocational schooling. The millions of young people who will enter the workforce in the coming years will not all be able to do white-collar jobs. As we argued in Chapter 3, it will be difficult for the country to create employment without a focus on manufacturing and agriculture, so technical skills are likely to come to the fore. If vocational institutions are to become attractive, however, standards must be improved. As a Lagos university professor argued, “people shun vocational training because the standard is so bad that graduates don't earn anything. If you do it well and graduates are seen to earn a good living, Nigerians will start wanting and respecting it.”

For jobs to be created, education must not stop at graduation. The in-country interviews revealed a desire for lifelong learning programmes so that workers can upgrade their skills. Agricultural extension programmes, for example, will help farmers keep up with new methods and technologies, and perhaps diversify into higher value produce.

Equally important for job creation is investment in infrastructure. “Once the infrastructure is in place,” said a young writer in Lagos, “investors and jobs will come.” Other interviewees highlighted the need for good roads and irrigation to boost agricultural production, while there were universal demands for a reliable power supply. Small and medium enterprises will be at the heart of job creation. Many of the young people we spoke to in Nigeria saw vocational training and improved infrastructure as vital for enabling SMEs to thrive. Some added that clarification of property and ownership rights, a favourable legal and tax framework, and stricter control of officials who demand bribes from small firms are also needed.

## A GATHERING WAVE

“Once the youth realize the urgency of the situation with regards to their futures,” writes a young Nigerian who contributed to the Task Force consultation, “I think a mass movement will ensue. Then and only then can change be effected in Nigeria.”

There are already signs that the pressure for change is building, as networks of young people come together to campaign for reform. Many are making use of the new opportunities that online technologies bring (see box 7).

According to one of our survey respondents:

*Youth groups are rising up everyday because Nigerian youth are tired. Tired of promises that amount to naught. Tired of a corrupt government and tired of recycled politicians. Tired of a failed and weak education system. Youth will [achieve change] by making their voices heard, going out to vote and making sure their votes count.*

The energy of the next generation gives Nigeria's leaders a choice. If they view young people's enthusiasm as an asset, they will find an important ally in the struggle to take their country forward. If they regard it as something to fear, they will find themselves in a struggle against a generation that is increasingly determined to make its voices heard.

## LightUpNigeria



In Nigeria, activism is increasingly directed at the problems that make it hard for young people to find the opportunities they need.

The LightUpNigeria movement has mobilised thousands of young Nigerians, both at home and overseas, to protest peacefully against the lack of a reliable power supply in the country.

The movement started out online, with Twitter and Facebook allowing a network to come together at high speed. LightUpNigeria's Facebook group now has over 28,000 members, while the movement has its own website (<http://www.lightupnigeria.org>). The campaign has organised town hall meetings in Nigeria, and protest rallies in Nigeria and in London, receiving extensive media coverage.

LightUpNigeria aims to put pressure on the country's leaders, at federal, state and local levels, to prioritise the provision of reliable energy. It also targets investors who can contribute to power generation. Its demands include a target for a minimum electricity provision of 300 Watts per capita by 2015 and a plan showing when each new megawatt will be added to the Nigerian electricity grid.

LightUpNigeria is only one example of young people finding new ways to mobilise and campaign for change. In March 2010, EnoughisEnough (<http://www.enoughisenoughnigeria.com/>) was founded as a coalition of youth groups working together to enrol, educate and support young voters. Its goal is to "mobilize 10 million young people, cutting across religious, ethnic and socio-economic divides in the country to vote in the 2011 elections."

Box 7





## AGENDA FOR NIGERIA COLLECTING THE DIVIDEND

The Task Force's research opens up a broad agenda for Nigeria, one that touches on all aspects of society and that will be relevant until the middle of the century, and perhaps beyond.

Importantly, it stretches the time horizon on which policymakers focus, helping them to explore long-term challenges that lie beyond the day-to-day issues that normally dominate the political agenda. By taking the long view, policymakers have an opportunity to build broad societal consensus around the reforms that will enable Nigeria to make the most of its demographic opportunities. The energy of young Nigerians can then provide the momentum needed to drive, and sustain, change.

On balance, the past decade has been positive for Nigeria. Successive governments have implemented much needed reforms and the economy has performed strongly in comparison to past years. The impact of the global economic crisis on Nigeria appears to have been limited, despite problems in the country's own banking sector. This is no reason for complacency, however. Nigeria is struggling to meet each of the Millennium Development Goals. If future governments fail to maintain the pace of reform or ensure that all parts of the country benefit from increasing prosperity, Nigeria could experience a sudden reversal of its fortunes.

Through Vision 2020, Nigeria has set the goal of becoming one of the world's 20 largest economies within the next ten years, while expanding its regional and global leadership roles. As the Task Force's research has shown, Nigeria will only achieve this objective if it consistently pursues policies that release the potential of its next generation. The Nigerian government also has the opportunity to play a compelling role on the international stage, as an advocate for Africa's young people and the role they can play in pushing the whole continent onto a more prosperous and secure path.

In this report, we set out some initial ideas for a policy agenda that will make the most difference to the next generation. We do not aim to provide final answers. Instead, our priority is to inform and catalyse debate within the government and business communities, civil society groups, faith and traditional leaders, and with members of the next generation itself. It is vital that the whole of Nigerian society mobilises behind an agenda that will meet the needs of the next generation.

We focus on five areas (see box 8). For each, we analyse key deficits in the current policy environment and propose ideas to tailor Nigerian policy to an era in which the next generation will swell the workforce at an accelerating rate. In each area, we aim to provide a sufficient foundation for more detailed work to be completed.

Nigeria urgently needs a robust action plan for its next generation. The Task Force's work serves as the first draft of this plan.

## UNDERSTANDING THE NEXT GENERATION

One striking finding from our research is how little is known about Nigeria's next generation.

Data are sparse and contested. Far from being a neutral assessment of population trends, the Nigerian census is highly politicised and unreliable. Federal funds and parliamentary seats are allocated according to the census results, and there are accusations of large undercounts in several areas.<sup>39</sup> As a result we cannot even be confident in how many people live in Nigeria. Other sources of evidence are usually patchy and out of date. Whether in the areas of health, education, or employment, the Nigerian government – and the international community – makes decisions based on information that is inadequate at best, and non-existent in many cases.

Given the lack of reliable data, it is unsurprising to find that strikingly little work has been completed on Nigeria's demographic dividend, or on the dangers posed by its demographic indicators. Despite recent signs of improved capacity within Nigerian institutions, international attention has failed to keep pace with the country's growing size and prominence. The government has made some efforts to improve its own research, but it is still far from generating the quality of analysis to allow for effective decision-making.

The international community is far from having a full grasp of Nigeria's future challenges. Interest in the country centres on its role as an oil exporter, with sporadic attention directed towards conflict, corruption, or other 'bad news' stories.

Few of Nigeria's key partners have considered the implications of the demographic threshold that Nigeria is now crossing. Foreign governments have an unfortunate tendency for kneejerk reactions to the security threat they believe young people pose, instead of promoting long-term strategies to enable Nigeria to seize its demographic opportunities.

Looking forward, we have identified the following priorities to understand the next generation:

- Strengthen statistical capacity at the national level. The Bureau of Statistics must be continually strengthened and placed at the heart of a cluster of institutions devoted to building the evidence needed for more effective policymaking. The National Strategy for the Development of Statistics must be fully and rapidly implemented.
- Increase the depth and breadth of research on Nigeria's next generation. Nigeria's academics, researchers and policy analysts must be engaged in a sustained programme to explore the attitudes, beliefs, and aspirations of the next generation in order to develop policies for maximising their potential, drawing on the expertise and resources of the international community as appropriate.
- Enable an active, nation-wide policy dialogue. The work of this Task Force should be used to launch a policy dialogue across Nigeria, through a series of roundtables, workshops, and online debates that aim to engage the whole nation in exploring the potential of the country's next generation.
- Undertake long-term strategic planning to develop policies oriented to the needs of Nigeria's next generation. The President should request that government ministries, civil society, and the business community collaborate on a long-term strategic planning exercise to explore 'next generation' policy options, in a process that gives a powerful voice to young people themselves. This is an opportunity to develop further Vision 2020 and to ensure that the next generation is fully involved in creating its own future.

At present, policymakers know too little about Nigeria's demographic challenges to develop effective solutions.

Policymakers now have the opportunity to turn Nigeria into a leader on the challenges facing the next generation, developing expertise that will resonate on a regional and global level.



## INVESTING IN PEOPLE

Striking conclusions have emerged from our analysis of Nigeria's human capital. The next generation's poor health and low education status compromise its ability to maximise its potential, and ordinary Nigerians are already spending as much on health and education as they can afford. However, some opportunities are on the horizon: slower growth in the number of children provides an opportunity to improve health and education systems and private investment in human capital will continue to rise – but only if the economy performs strongly. Public sector investment, in contrast, is far below international benchmarks. Therefore, the government must take primary responsibility for initiating a sustained increase in human capital investment.

The overarching priority for human capital development in Nigeria is to increase public sector commitment to health and education. In particular:

- The government should set a target of doubling per capita public sector expenditure on health and education by 2020, and doubling it again by 2030. This target could be achieved through more effective use of the Excess Crude Account, which is used to help stabilise the government's budget in the face of oil price volatility. We support the creation of a Next Generation Fund, with independent oversight, charged with investing oil profits in Nigeria's human capital. Oil must be used now to fund Nigeria's future, preparing for a time when natural resources begin to decline. The fund should have strong youth involvement, with young people helping to structure funding policies that will provide them with the vocations, skills, and opportunities that they need.

In the short term, this Fund would support improvements in education and health infrastructure, including the training of teachers and health workers. It would also build up an endowment to fund running costs in the medium and longer term, encouraging sustained improvement in both access and quality. Its long term focus would provide a balance for the government's more immediate priorities, and ensure continuity across successive administrations.

### Education

For education, the government should set the following immediate priorities:

- Improve the provision of basic education nation-wide, with particular emphasis on those parts of the country that are still far from meeting their obligation to provide free education to all children. Special attention should be paid to improving the education of disadvantaged children,

in particular girls, children in Northern regions, and children who speak Hausa. One in ten of the world's children who are not in primary school live in Nigeria,<sup>34</sup> and most of these live in Northern regions and/or speak Hausa. Girls are also highly vulnerable to exclusion from education. These extreme inequalities threaten Nigeria's cohesiveness and mean that some parts of the country have little immediate prospect of completing the demographic transition.

Rapid progress is possible. India managed to cut the proportion of children out of primary school from 50% in the mid 1980s to 15% 25 years later.<sup>35</sup> Nigeria starts from even more dismal numbers in the North East and North West, but is capable of making equally fast strides towards universal primary education, putting at least an additional two million children into school over the next ten years. Investments in infrastructure, teachers, and governance are necessary to reach this goal.

A sustained programme of engagement is needed with young parents in disadvantaged areas, many of whom are poorly educated themselves. Along these lines, the following priorities should be pursued:

- Reduce the costs of education for poor families, focusing not just on tuition costs, but on books, transport, uniforms, and meals.
- Open up a dialogue between parents and their communities about the non-economic barriers that keep children out of school.
- Increase the role played by parents in their local schools, empowering them to demand higher standards while playing a larger role in their children's education.
- Build a stronger link between educational provision and the labour market, through expanding Technical and Vocational Education and partnering with the private sector.

At present, too few young Nigerians are equipped with the skills needed to find jobs, often in spite of the education they receive. The government's renewed focus on Technical and Vocational Education must be the first step towards ensuring that all students not pursuing higher education are provided with relevant vocational skills during secondary school. A rapid expansion of technical training for young adults will also be needed to improve the prospects of those who have already passed through the educational system. An effective programme will rest on a partnership with the private sector that audits which skills are most likely to be useful in the next decade, and then designs the curricula and educational system needed to deliver them.

## Health

Rapid gains in health are also possible. Interventions exist to tackle the leading causes of death among young children. In particular, infectious diseases can be addressed through providing routine vaccination or other low cost measures such as insecticide-treated bed nets, basic medical care for pregnant women, or oral rehydration therapy for diarrhoeal diseases. As with education, regions with very poor health indicators need emergency funding to build effective primary health care systems, with a focus on maternal and child health care. Rapid progress can be made through pursuit of the following priorities:

- Strengthening the role of community groups in reaching out to under-served areas and groups, using their local networks and reserves of trust to break down the barriers to good health.
- Investing in primary health care services for families, centred around the needs of children and their parents, and delivered locally and at low or zero cost.
- Ensuring holistic delivery of education and health services to women, ensuring that a growing proportion of young mothers are empowered to make effective decisions about health.

Aside from their economic difficulties, Nigerians describe education and health as the most important problems facing them and their families.<sup>36</sup> Correcting Nigeria's human capital deficit will not only allow the country to capture more of its demographic dividend, it will also give citizens confidence that they are living in a society that is increasingly able to meet their basic needs.

Investment in human capital will bring Nigeria substantial economic reform, and will also lay the foundation for building a stronger society.

## YOUNG FAMILIES

One of the most important steps taken by young Nigerians is the decision to start their own families. The average Nigerian woman marries before the age of eighteen, while a man marries in his mid-twenties. They are then responsible for decisions that will have a huge impact on Nigeria's future. How quickly do they have children? And how large a family do they aim to raise? Are they able to provide proper nutrition and healthcare for their children, especially in their critical first few years? How much importance do they place on education? Can they find the jobs they need to support their children? And are they able to save anything for the years after their children have left home?

Support for young families must therefore be at the heart of Nigeria's policy agenda. It is strongly in the public interest that Nigerian families are of a size that allows parents to ensure each child is equipped to live independent and fulfilled lives; children receive quality care within the family, backed up by family-friendly public services; and parents get the support they need, especially those who suffer from disadvantage and social exclusion.

- At present, the overwhelming priority in this area must be a reduction of infant and child mortality rates. One main reason that Nigeria's demographic transition has been so slow is parents cannot be sure that their children will grow to adulthood, and therefore bear large numbers of children in order to achieve the desired number of surviving children. Without significant reductions in mortality, fertility rates will remain high, and the demographic transition process will be halted. Experience from around the world indicates that most people would prefer to have relatively small families, but only when they can be certain that illness, accidents, or conflict will not suddenly leave them with fewer children than desired.
- Support families who opt for smaller family size, with the expansion of family planning and education as cornerstones of this effort. With improved health for children, we would expect many young Nigerians to opt for smaller families, a trend that would accelerate over the next two or three generations. This would lead to Nigeria's population stabilising somewhere between 250-300 million people, and would alleviate pressure on natural resources, land, and infrastructure. A stabilising population will provide Nigeria's citizens with greater opportunities to improve their lives, and will enable Nigeria to become an influential regional and global player.

Already, young women in Nigeria are more likely than older women to want smaller families. Married women are also looking to space their children out, with nearly a quarter of all married mothers aged between 15 and 49 wanting to delay having another child for at least two years, and another 10% saying that they are satisfied with the number of children they currently have.<sup>37</sup> However, more than half of these women do not have access to family planning services. Better family planning, included as part of a range of health care services for young mothers, would help many more young Nigerians achieve their desired family size, while reducing the number of women who die in childbirth (which currently stands at more than one for every hundred births).

Education also impacts family size. The average Nigerian woman in her twenties desires 4.6 children, if she has received at least a secondary education. A woman with no education at all, in contrast, desires an average of 7.9 children.<sup>38</sup>

This impact is passed from generation to generation: educated mothers have healthier and more educated children, accelerating the demographic transition, enabling a society to maximise its demographic opportunities, and helping create the wealth that can support greater human capital investment for future generations. Nigeria's future rests on educated women who are able to shift the prospects of the next generation.

- Establish a national commission to oversee the development of a pro-family policy agenda in Nigeria. Creating pro-family policies is a task for every sector of the Nigerian government, touching on health and education, social protection, law and order, housing, and transport. Many Nigerians lack confidence in their government's ability to deliver these services, with over four in ten Nigerians citing the government itself as one of the three most important problems facing themselves and their families. The government will need to harness the energies of civil society and business if it is to address these goals, and it must make a sustained effort to create family-friendly policies.

We recommend that a Commission for the Nigerian Family be established to review the needs of families and make recommendations for integrated, pro-family policies.

## THE NEXT GENERATION AT WORK

In chapter 3 of this report, we identified profound weaknesses in the Nigerian labour market. Young people may be Nigeria's greatest asset, but the country is not creating enough employment to make full use of their talents.

Jobs need to be created for the unemployed (the majority of whom are men), while opportunities are needed to bring many more women into the workplace. Nigeria will be hard pressed to reach its Vision 2020 goal if it fails to move towards greater gender equality.

Oil has been, at best, a mixed blessing for Nigeria. As the Minister of State for Finance recently argued, during the twentieth century, the country suffered from a resource curse, as oil revenue led to an appreciation of the currency, a 'boom and bust' cycle of government expenditure, pro-cyclical fiscal policy, corruption, and a lack of investment outside the oil sector. In addition, the failure to develop value-added activities within the oil sector itself, such as refining, has resulted in the industry only employing only a few tens of thousands of Nigerians.

We believe there are three priorities for action to improve the labour prospects and productivity of the next generation:

- Develop the infrastructure needed to underpin a world class economy. Nigeria will have an insatiable appetite for infrastructure over the coming generation, with rapid population growth in its towns and cities, and growing demand from an expanding business sector. To date, Nigeria has been unable to keep up with this demand. Nowhere is this problem more pronounced than in power generation, where more than 30% of electricity is produced by dirty and inefficient private generators. Similarly, over half of Nigeria's gas is simply burned off, with flaring wasting \$2.5 billion worth of gas a year (enough to provide power generation for all of sub-Saharan Africa).<sup>39</sup> In Nigeria, small firms are losing almost a quarter of their output due to power cuts, while medium-sized firms are losing 14%, and large firms 17%.<sup>40</sup>

Correcting these deficits and responding to new demand will be costly. According to the World Bank, Nigeria needs to spend an additional 4% of its GDP on infrastructure in order to achieve faster economic growth,<sup>41</sup> with roughly a third of that amount needed to improve maintenance of the existing infrastructure. But this investment should yield a substantial return. The Bank believes that as much of half of Africa's improved economic performance since the turn of the century is due to better infrastructure. The rapid rollout of mobile telecommunications counts for the bulk of the improvement, with other key infrastructural elements (electricity in particular) still deteriorating and acting as a drag on growth.

- Diversify away from oil, with an emphasis on sectors that will improve the employment prospects for young people. Economic diversification policies are needed for both urban and rural areas. For rural areas, agriculture is vitally important. Agriculture productivity failed to improve in the 30 years since independence; and although output per worker has trebled since the mid-1980s, Nigerian agriculture is still far behind international benchmarks, with low research and training for farmers, low levels of mechanisation and irrigation, weak communications and markets, and inadequate access to credit.<sup>42</sup> Soil degradation is also a growing threat, especially in the North, where climate change is expected to exacerbate desertification.
- Remove obstacles to economic growth and private enterprise. In spite of many challenges, rapid progress is possible. With the population of rural areas stabilising and rapidly growing demand for agricultural products from the cities, significant further improvements are indeed possible. With greater investment in support for farmers, rural areas are well-positioned for a long agricultural boom that will improve living standards in Nigeria's poorest regions, while moderating migration from the countryside to the cities.



Boosting employment in urban areas is going to be a much more significant challenge. At present, manufacturing contributes less than 4% of GDP, against a government target of 10% for the end of the decade.<sup>43</sup> There are some promising sectors of the service industry, such as mobile telephone technology, film, and – before the recent crisis – banking, but many of these sectors offer marginal employment at best, and the service industry as a whole appears to add less value to the Nigerian economy than agriculture. In 2009, Nigeria ranked 99<sup>th</sup> out of 133 countries in the World Economic Forum's Global Competitiveness Index, revealing the profound difficulty of doing business in (and involving) Nigeria.

In addition to better infrastructure and healthier, more educated workers, businesses need:

- Continuation of the relative fiscal stability that Nigeria has experienced over the past decade, combined with ongoing action to reduce the corruption, bureaucracy, and crime that add significantly to business's costs.
- Restructuring of the banking sector to increase levels of investment in infrastructure and enterprise, and to provide personal finance services to a growing number of Nigerians.
- The development of special industrial zones and small business clusters, with tax concessions directed towards job creation.

Reducing levels of youth unemployment – and keeping them low as the labour market expands – should be the government's over-riding priority.

## NEXT GENERATION FUTURES

For Nigeria to collect its demographic dividend, its citizens need to have the confidence to plan for and invest in the future. The innovative energy of young people must be harnessed, and Nigeria must adopt far-sighted and consistent policies:

- Regulation of financial markets to facilitate saving and borrowing among Nigeria's youth. As young adults enter the workplace, they need opportunities and the financial structures to save or borrow money for major lifetime expenditures, especially as they start families or save for retirement. Nigeria's financial services industry has a major role to play in the country's future. It must therefore be regulated in a way that guarantees its soundness, while ensuring that it fulfils vital social functions.

Investment in social protection programmes. There is a very strong case for investment in social protection programmes, to ensure that all Nigerians – and especially the

poorest and most vulnerable – are resilient to shocks they may face through illness, accidents, unemployment, or natural disasters. Nigerians will be more likely to take risks beneficial to society (for example, investing in a business) if they know they are protected against other dangers to their livelihoods. Social protection will also strengthen families, increase the likelihood of children staying in school, and help tackle vulnerability in the poorest communities.

- Provide young Nigerians with greater opportunity to engage with the political process and become more active citizens. Over the coming years, the country can expect to see far-reaching social change, as young people bring new vision, attitudes, and desires to the workforce and wider society. Currently, however, youth are largely excluded from the political process. They are thus finding new ways to organise, using the internet, for example, to lobby against load shedding (intentional power outages, where demand exceeds supply) and electricity shortages. This energy could be hugely positive, or it could become a destructive force if the majority of young people becoming disaffected and disillusioned, and turn to violent protest.

Action is therefore urgently needed to enable young Nigerians to become increasingly active citizens. Youth groups should be invited to express their opinions at a regular Next Generation Forum with involvement from senior government leaders. The government should also reach out to the next generation through mobile phones (owned by 50% of Nigerians), through internet-based social networks, and through radio and television. Targets should be set for increasing youth voting levels and political parties should start investing in young leaders, ensuring that a new generation is quickly brought onto the political stage. Increased networking between young people is already occurring, facilitated by social media such as Facebook and Twitter. This provides a unique opportunity for the next generation to find its voice and to organise to protect its interests.

- Develop rehabilitation programs for youth who have been involved in conflict or crime. While investment in human capital and jobs will address some causes of social exclusion, action will also be needed to confront the radicalisation of young people, and to rehabilitate those who have become involved in conflict or crime. In particular, targeted training programmes will be needed for young people involved in violence, in prison, or as they leave prison.
- Leverage the Nigerian diaspora. The Nigerian diaspora should also be managed as a strategic asset. Nigerians overseas are increasingly numerous, wealthy, and well-connected. In the United States, for example, more than a quarter of the Nigerian-born

population over the age of 25 has a post-graduate qualification, making them much more educated than native US citizens.<sup>44</sup> Nigerians overseas are also sending home growing sums of money, with remittances increasing over eight-fold between 2001 and 2008, and now comprising 4.5% of Nigerian GDP.<sup>45</sup> Over the next 20 years, Nigeria is almost certain to continue to have surplus labour capacity. It will therefore need to:

- Enable those Nigerians who wish to work abroad to do so, using labour markets in other countries to soak up excess Nigerian labour, whilst domestic labour markets are expanded.
- Ensure that it is easy and secure for Nigerians to send money home, increasing investment in education, health, and enterprise.
- Exploit the power of the diaspora, using connections provided by the network to increase business opportunities for Nigeria.
- Encourage Nigerians to return home, bringing their education, skills, and experience back to their home economy.

Nigeria's next generation must be allowed to find its own voice, not frustrated by a lack of opportunity and political voice.

## NEXT STEPS FOR NIGERIA

The Task Force's work offers considerable hope for Nigeria. Over the next generation, it has the potential to enter a highly positive era, as its demographics create the conditions for a reinforcing cycle of economic growth, investment in human capital, and growing political stability.

However, it is undeniably the case that substantial remedial action will be needed if Nigeria is to take this opportunity to set a new course as a regional leader and an increasingly influential global player. We have set out proposals for:

- Increasing understanding of Nigeria's demographic and policy challenges.
- Making the investment in young Nigerians that will pay substantial dividends in the future.
- Putting the needs of young families at the heart of government policy.
- Focusing the government, private sector, civil society, and international partners on the pressing need to create jobs for young people.

- Harnessing the energy and initiative of the next generation, and enabling them to become active citizens.

However, better policies alone will not be enough. What Nigeria – and its next generation – needs in addition is visionary and far-sighted leadership. A new era is beginning for the country. Future challenges will be very different from those seen in the period since independence. Bold action is needed today to ensure that tomorrow's opportunities do not go to waste.

## Nigeria's Demographic Dividend

### Understanding the Next Generation

Equip policymakers with the insights they need to realise the dividend's potential

### Investing In People

Invest in human capital in order to build a stronger and more sustainable nation

### Young Families

Make women the priority, establish and implement pro-family policies in all areas of society

### Next Generation at Work

Create more opportunities for Nigeria's young people, cutting levels of youth unemployment

### Next Generation Futures

Harness the innovative energy of young people and engage them as active citizens

Box 8

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