

**Nigeria 2030: Alternate Scenarios for Africa's Powerhouse**

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**Abstract:**

*This thesis paper examines the political, economic, and social characteristics that define the country of Nigeria, Africa's largest country by GDP and population. It then identifies a set of eight prominent drivers that will have the greatest influence on Nigeria's future and uses the interaction of these drivers to create three plausible, distinct scenarios for Nigeria in the next decade. These three scenarios are **Fragmentation**, **Stagnation**, and **Emergence**, representing an attempt to manage the uncertainty of a rapidly changing world facing the Covid-19 pandemic, a large-scale conventional conflict between Russia and Ukraine, democratic backsliding, and the effects of climate change. The scenario process reveals several drivers to be of primary important for Nigeria's future and contain implications for domestic policymakers as well as U.S. foreign policy. Challenges and opportunities emerge from the scenarios, such as managing the consequences of the Covid-19 pandemic. The U.S. has an opportunity to use vaccine diplomacy to strengthen its relationship with Nigeria and reassert global leadership. The deteriorating security situation across the country is a major challenge for the Nigerian government and drives the political and economic stability of the country. Finally, the competition between the U.S. and China in Africa within each scenario highlights the ultimate importance of Nigeria to build a more stable, prosperous, and sustainable future in West Africa, the African continent, and indeed, the entire world.*

**Introduction:**

Nigeria features the continent of Africa's largest economy and population, with an overall population over 225 million people and a GDP of \$475 billion (nominal) or \$1 trillion (purchasing power parity).<sup>i</sup> Once a British colony, Nigeria witnessed the ascension of a stable, democratically elected government in 1999 following decades of military rule and instability. The 2015 elections saw the first peaceful democratic transfer of power in Nigeria's post-colonial history with the election of current President Muhammadu Buhari.<sup>ii</sup> The national economy relies on large oil and gas reserves, although thus far it has failed to take advantage of this sector due to rampant corruption and poor infrastructure. In addition to having the largest economy and population in Africa, Nigeria is widely considered to be the cultural capital of the continent. Its film industry, known as Nollywood, produces the second most films in the world, after India's Bollywood and ahead of Hollywood.<sup>iii</sup> Nigeria's arts and music scene are equally important. They are centered in the coastal metropolis of Lagos, generally considered to be the most populated city in Africa and one of the fastest growing.

The development of Nigeria has also encountered numerous challenges over the last decade. Like many former colonies in Africa, Nigeria's borders do not encompass one single religious or ethnic group. There are around 250 ethnic groups in the country with about 53.5% of Nigerians being Muslim and 45% Christian.<sup>iv</sup> This reality has created a political divide between the North and South of the country and provided Boko Haram and other terrorist groups room to operate in the northeast and remote regions. In addition, Nigeria must confront the challenges associated with a rapid rise in population. Over half of its citizenry is under the age of 25,<sup>v</sup> and there have been large-scale protests against police violence in recent years such as the "End SARS" movement. For reasons of geography, culture, population and economics, Nigeria is at

the heart of contemporary Great Power competition in Africa. China has invested \$20 billion in loans for the development of rail infrastructure,<sup>vi</sup> while the United States has maintained an active military and economic partnership with Nigeria, including the provision of more than \$2.1 billion in humanitarian assistance since 2015.<sup>vii</sup> In addition, Russia has increased the role of the Wagner Group in several countries surrounding Nigeria including the Central African Republic.

The next decade will be instrumental for Nigeria's future. The ongoing Covid-19 pandemic has hampered recent economic progress, as unemployment continues to rise and the country experiences its highest inflation in five years.<sup>viii</sup> The Nigerian government has imposed lockdowns and travel restrictions, and total cases and deaths from the virus remain low. However, the drastic rise of cases in China in 2022 and India in 2021 has proven that Covid-19 can still devastate countries that previously seemed to avoid major outbreaks. There are a variety of important factors that will affect Nigeria's trajectory in the coming decade, which will have strong implications for citizens of the largest country in Africa, its neighbors, and consequently U.S. foreign policy. The interaction of the following drivers will interact to inform three scenarios regarding Nigeria in 2030: **Fragmentation**, **Stagnation** and **Emergence**.

### **Drivers:**

#### *Peace and Security*

The colonial legacy of Nigeria has negatively impacted its security. Within the national borders arbitrarily drawn by European powers, there are over 250 diverse ethnic groups spread out across 36 Nigerian states. This ethnic diversity has been one factor contributing to recurrent conflict since attaining independence from Britain in 1960. Most notably was the Nigerian Civil War from 1967-1970 in which members of the Christian Igbo ethnic group in the southeast attempted to secede and form the Republic of Biafra. Over a million civilians perished, largely

from famine and disease, before the rebellious Igbo surrendered.<sup>ix</sup> The legacy of this conflict persists in the region. Following the ascension of former military dictator Muhammadu Buhari to the presidency in 2015, elected on a counterterrorism platform, government forces used increasingly heavy-handed measures that have killed hundreds if not thousands of Nigerians. This police brutality has recently led to a new secessionist movement called the Indigenous People of Biafra (IPOB), which initially sought a peaceful settlement to the issue of Biafran secession. However, in 2020, the IPOB formed a military wing of the political movement, called the Eastern Security Network (ESN), and began to resort to violence against government forces.<sup>x</sup> The government, in turn, has responded with a heavy hand against alleged attacks by the group.<sup>xi</sup> The ESN is one of many groups that has filled the vacuum left by a security environment in which the government does not have a monopoly on force.<sup>xii</sup>

Violence and instability threaten the security of other regions of Nigeria as well. In the northeast, Islamic extremist groups such as Boko Haram has been waging a violent insurgency for over a decade. Factions like the Islamic State West Africa Province (ISWAP) have emerged from Boko Haram to form new threats to security.<sup>xiii</sup> In the state of Borno, the epicenter of the violence, over 35,000 people have been killed in the last decade. Nationwide, estimates put violent deaths from Boko Haram (and its offshoots), state actors and sectarian groups at 87,903 over the same time frame, as of March 2022.<sup>xiv</sup> Violence has spread beyond the northeast and the south, where the ESN and sectarian violence has been on the rise. Kidnappings and banditry have spread across rural regions of Nigeria. Insurgent organizations from Boko Haram to local vigilante groups have contributed to this insecurity, culminating in a recent attack on a train traveling from the capital Abuja to the nearby city of Kaduna. At least 8 people were killed, and hundreds remain missing, despite the Abuja-Kaduna line having a reputation for relative safety

and efficiency.<sup>xv</sup> In the next decade, the ability of the government to restore peace and security in the country will be one of the principal factors affecting its direction.

### *Covid-19*

The ongoing Covid-19 pandemic is another significant driver of Nigeria's development in the next decade. Thus far total cases and deaths from the virus remain low: officially, there have only been 255,000 cases and 3,143 deaths.<sup>xvi</sup> Over 33 million doses of vaccine have been administered, and the government expects about 85 million secured doses to arrive soon. Officials aim to have 70% of the country vaccinated by the end of 2022, though polls show many Nigerians are hesitant to get inoculated.<sup>xvii</sup> The consequences of the pandemic now and into the future go beyond total numbers or public health considerations. Nigeria's oil industry, and economy in general, has been hit hard since the crisis began. The oil industry accounts for half of government revenue, and these revenues declined by about 65% in 2020.<sup>xviii</sup> Similar declines have been felt in Nigeria's informal economy, and World Bank experts believe that the country will not be able to recover from the pandemic unless it diversifies its economy. Nigeria's future will hinge on its ability to vaccinate most of its citizens before the virus can take a severe human toll, alongside the global progression of the pandemic. An effective public health response coordinated with an economic one will be an important indicator of which direction the country will go in. The future of vaccine production will be equally important, and could allow Nigeria to control its own supply of vaccines moving forward instead of relying on other countries.<sup>xix</sup>

### *Economic Diversification and Reform*

As stated before, the Nigerian economy has been hit hard by the Covid-19 pandemic. In the year 2020 Nigeria experienced a recession, with GDP contracting by 1.92%.<sup>xx</sup> This comes after four years of gradual growth following the previous recession in 2016. The performance of

the economy is greatly influenced by its oil industry: Nigeria is the largest oil exporter in Africa and contains the greatest natural gas reserves on the continent.<sup>xxi</sup> A report by Bloomberg Economics found that: “While crude contributes less than 10% to the country’s GDP, it accounts for nearly all foreign-exchange earnings and half of government revenue in the continent’s biggest producer of the commodity.”<sup>xxii</sup> The price of crude oil has been significantly diminished by the pandemic. Nigeria’s dependence on such a volatile industry makes its prospects for sustainable development grim unless it can diversify its economy moving forward. There have been some positive signs, such as the non-oil economy expanding overall in 2020 by 1.7%, driven by 3.4% growth in the agriculture sector and 17.6% in telecommunications. Room for diversification is evidenced by these trends. Additionally, Nigeria has one of the most influential film industries in the world, making up 2.3% of total GDP.<sup>xxiii</sup> Reforming the economy to be more dynamic would insulate it from external shocks. The country has one of the youngest populations of any large state in the world, and its future depends on whether there will be jobs available when they become working adults.

Economic diversification is also an important driver for the future of food security and government revenue in Nigeria. The state of the agriculture industry is particularly important moving forward. Formerly “the primary source of government revenue and foreign exchange earnings, agriculture in Nigeria has suffered from decades of underinvestment, corruption, policy neglect, and lost opportunity.”<sup>xxiv</sup> Nigeria today is a net importer of food and is heavily reliant on regional and international conditions for its food supply. Approximately 40% of Nigerians live below the national poverty line.<sup>xxv</sup> Nigeria’s ability to diversify the economy through practical reforms will be a vital force driving the future of the country.

*China and Foreign Direct Investment*

Nigeria's future will depend on its principal trading partners as well as its sources of investment. As the largest country by population in Africa, Nigeria is also its largest emerging market. In 2019, it received the fourth-most Foreign Direct Investment (FDI) of any country in Africa, only behind Egypt, South Africa and the Republic of the Congo. Nigeria received \$3.3 billion in FDI in that year, down from about \$6.2 billion in 2018, primarily due to a "slowdown in the investment in the oil and gas industry."<sup>xxvi</sup> The United States is currently the largest supplier of FDI in Nigeria but China's influence there is growing quickly.<sup>xxvii</sup> Nigeria signed on to China's Belt and Road Initiative (BRI) in 2019.<sup>xxviii</sup> Although the pandemic largely interrupted the flow of FDI and assistance to Nigeria, infrastructure projects like the Lagos-Kano railway have had portions completed with Chinese funding, and many more remain stalled due to the pandemic.<sup>xxix</sup> When the pandemic ends and the global economy begins to recover, Nigeria will have to decide whether to welcome Chinese investment and influence. The United States and organizations like the International Monetary Fund offer loans with significant strings attached. On the other hand, China has shown a willingness to offer low-interest loans with few requirements. A key driver of Nigeria's future will be how they prioritize engagement with China, the United States, and the international community.

### *Demographic Change*

The population of Nigeria stands at about 225 million people, sixth most in the world and the largest in Africa.<sup>xxx</sup> Projected to reach 264 million by 2030, Nigeria's population is one of the youngest in the world, with approximately 60% being under the age of 25.<sup>xxxi</sup> These demographic realities can become a source of strength to the nation in the near future, providing the world's largest working-age labor force that is contrasted to the aging societies in China, Japan, the United States and Europe. They can also become a source for instability. Nigeria is



quickly urbanizing and features some of the largest cities in the world. Between 2007 and 2017 the urban population grew from 41% of the total to over 50%.<sup>xxxii</sup> Lagos leads the way as Nigeria's largest city with over 13 million people, and there are 7 cities across the country that contain a million or more.<sup>xxxiii</sup> Social services, infrastructure and amenities have not been able to keep up, and access to health care is minimal. The government faces a massive challenge: to generate economic progress and provide jobs for the millions of young people coming of age. If they fail to do so, the conflict plaguing the northeast, south and pastoral areas may have new recruits. Rural citizens fleeing the violence will continue to flood the cities, hampering efforts to modernize and develop urban areas. The effect of demographic change in Nigeria's "baby boom" era will depend on a confluence of the other drivers. Increasing population can help lead the country to a prosperous future or act as a weight holding down development efforts. Crowded cities are susceptible to current and future pandemics. Health care and social programs are difficult to develop in rapidly growing populations.

### *Regional Factors*

These drivers will all be influenced by regional factors. Nigeria is surrounded by nations with similar standards of poverty and instability, even though it dwarfs its neighbors in overall size and influence. Events in other countries in West and Central Africa could be drivers affecting change in Nigeria. Niger, Chad, and Northern Cameroon are hotbeds for extremist violence. Groups like Boko Haram frequently retreat across borders or generate refugee flows from other countries. The recent death of the Chadian President on the battlefield forced the Nigerian government to strengthen security on the border.<sup>xxxiv</sup> Any infectious disease outbreak in the region could affect Nigeria's trajectory, such as an explosion of Covid-19 in Porto-Novo, Benin, or a reemergence of the Ebola virus.

Political crises in neighboring countries could also drive Nigeria's future over the next decade. The 2010's saw a substantial rise in political crises across sub-Saharan Africa, and especially in West Africa. Mali witnessed the overthrow of two governments between 2020-2021, Chad lost its authoritarian president of 30 years in a murky situation on the battlefield in 2021, and in Burkina Faso the government was overthrown by military officers in early 2022.<sup>xxxv</sup> These coups and military takeovers are symptoms of the political environment that characterize many countries in the region. Poverty, climate change, terrorism and counterterrorism, particularly along the Sahel, have laid the groundwork for political crises. Nigeria features many of the same conditions. If coups are contagious, as many observers believe, then political events in regional countries are likely to drive Nigeria's political future, for better or for worse.<sup>xxxvixxxvii</sup>

#### *Geopolitics - Russia/Ukraine*

The consequences of Russia's invasion of Ukraine will likely be a significant driver for the future of Nigeria. The price and supply of oil and petroleum products will be heavily dependent on the short-term progress of the conflict, with the potential for long-term impacts contingent on the future relationship between Russia and the international community. In addition, Nigeria, along with much of West Africa, is heavily dependent on Russian and Ukrainian foodstuffs. In 2020, for example, Nigeria imported \$2.15 Billion worth of wheat, of which \$556 million came from Russia.<sup>xxxviii</sup> While the conflict is probably going to continue being fought predominantly in Ukrainian territory, and is unlikely to significantly affect Russian wheat *production*, its *price* has already significantly risen. The consequences of wheat prices resulting from the Ukraine crisis will be an important driver for Nigeria's future. In the short-term, higher prices and decreased global supply could compound food security issues that are already prevalent due to COVID-19.<sup>xxxix</sup>

The political implications of the crisis may also prove consequential. In the first 2 months after Russia's invasion, most African nations refrain from choosing sides. Nigeria was no exception, objecting to the treatment of Nigerian citizens in Ukraine, but remaining neutral of any commitments to either the West or Russia.<sup>xi</sup> Nigeria voted to condemn Russia's actions and reaffirm Ukraine's sovereignty immediately following the invasion, but joined 57 other countries to abstain from the vote to remove Russia from the Human Rights Council a month later.<sup>xli</sup> If the conflict continues across the long-term, Nigeria and its regional neighbors will be more likely to lean towards one side or the other. The effects of the war could drive Nigeria closer to the West and the United States, increasing their economic and military relationships.<sup>xlii</sup> This outcome could accompany a severe crisis in food security. Or, Nigeria could be pushed closer to Russia, perhaps welcoming greater support from Russian military expertise and forces such as the Wagner group. Either way, the implications for peace and security in Nigeria, especially pertaining to its counterterrorism strategy, will be significant.

### *Climate Change*

The future of Nigeria, and indeed the entire world, will be driven by the impacts of climate change. The 2022 report by the Intergovernmental Panel on Climate Change (IPCC) found that between 2022-2040: "Global warming, reaching 1.5°C in the near-term, would cause unavoidable increases in multiple climate hazards and present multiple risks to ecosystems and humans (*very high confidence*)"<sup>xliii</sup> The report also found that countries in Sub-Saharan Africa, especially in West Africa, are among the most vulnerable to the impending consequences of climate change, despite having contributed very little in historic emissions leading to the crisis. In Nigeria, climate change may compound existing issues of fragility. Drought, flooding, and changing ecosystems could drive the conflict between farmers and pastoralists, limit the

development of coastal cities, exacerbate food insecurity, and hamper efforts to develop sustainable infrastructure.<sup>xliv</sup> Climate change will force the Nigerian government to adapt and mitigate. The future of the oil and petroleum industry, conflict, and the economy, to name a few, will be driven by the consequences of a changing climate and how the government responds.<sup>xlv</sup>

## **SCENARIO 1: FRAGMENTATION**

### **Introduction**

In this scenario, Nigeria enters 2030 as a fragmented nation in which the government exercises little control over the country outside of the main cities. It is driven in the short-term by consequences of the Covid-19 pandemic, fallout from the Russia-Ukraine crisis, and poor governance exacerbated by regional political tumult. In 2030, secessionist movements are rampant around the country. Poverty and conflict are more prevalent than any time since the Civil War 60 years before. Years of flawed counterterrorism strategy, supported by the United States, prioritized military solutions, and exacerbated the conflicts across the country. The Boko Haram insurgency, affiliate groups of the Islamic State, and related groups hold large swathes of Borno and Yobe states in the northeast. A *de facto* state has emerged in the Niger Delta region in the southeast under the leadership of the Indigenous People of Biafra. Cattle grazing communities seeking better pastures engage in violent clashes across the center of the country with sedentary farmers as desertification spreads because of climate change.<sup>xlvi</sup> The oil and petroleum industry has been severely depleted by years of flawed policy, neglect of infrastructure, and the emergence of the IPOB-led state. What remains of the industry is dominated by Chinese companies that use bribes and private security forces to keep it flowing. Government revenues are almost nonexistent and Foreign Direct Investment has come to a halt. Nigeria has essentially become a failed state, with a corrupt and ineffective government exerting

authority over the Federal Capital Territory surrounding Abuja. Coastal cities such as Lagos and Port Harcourt maintain wealthy districts segregated from massive slums.

***The Road to 2030:***

*2022-2023: Pandemic takes hold, Security deteriorates*

The government enters the second half of 2022 with plans to counter the ongoing coronavirus pandemic by the end of 2023. The UN and COVAX anticipate the supply of enough vaccines to inoculate over 70% of the country by then.<sup>xlvii</sup> However, cracks begin to emerge in the global response. China's pursuit of a "Zero-Covid" policy runs up against a new variant of the virus in mid-2022, and forced lockdowns extend the international supply-chain crisis.<sup>xlviii</sup> India also experiences a catastrophic wave with thousands of deaths a day despite desperate lockdowns and aid from the international community. At the end of the summer, other countries in South Asia and Africa begin to experience similar outbreaks. Mombasa, Dar es Salaam, and Kampala see alarming spikes in the spread of the virus for the first time. It continues to spread, centered on the large urban centers of Africa and slowly to more remote areas. Death rates from the virus are difficult to calculate due to poor testing and insufficient data. However, fear of the virus forces governments to implement strict lockdowns. Misinformation about the true death toll penetrates the information environment, generating distrust and fear amongst the population. Sub-Saharan Africa enters another recession, reversing the gains made in 2021 and predicted for 2022.<sup>xlix</sup> By the fall of 2022, this wave hits Lagos. With only 10% of the country vaccinated, and even fewer boosted, evidence of the severe human impact is clear as hospitals around the city are overwhelmed for the first time in the pandemic. The desperate government of President Buhari enforces stricter limitations on travel between Lagos State and its neighbors. This policy is ineffective, as the virus spreads outside of Lagos within two months and consumes the coastal

regions and main cities. The World Health Organization estimates that Nigeria is averaging over 2,000 deaths a day. Abuja, Kano, Lagos, and other cities experience rising unrest.

At the same time, the political and security environment in the region deteriorates. Coups in Niger and Cameroon create fear and uncertainty in the Buhari government. The Eastern Security Network (ESN) in the southeast and jihadist groups in the northeast take advantage of the instability and violence escalates around the country. Kidnappings and attacks by sectarian groups increase as new fault lines emerge. In response, President Buhari declares martial law, and begins to employ harsh rhetoric against the perceived enemies of the state. In the southeast, evidence emerges of increased cooperation between IPOB and Anglophone separatists in Cameroon.<sup>i</sup> The latter are threatened by a new campaign instigated by Cameroon's new military government installed via coup. With active operations in 35 of Nigeria's 36 states to combat Boko Haram, separatist groups and communal violence, the Nigerian military begins to conduct repressive operations immediately.<sup>ii</sup> The enactment of martial law removes most restrictions on military forces. Civilians fleeing cities to the countryside are met by roadblocks and live fire.

Nigeria enters 2023 with an economy that shrank by over 8% in the previous year, erasing the small gains made in 2021 and the first half of 2022.<sup>iii</sup> The Russia-Ukraine crisis remains ongoing, and its effects on wheat and oil prices have had severe economic consequences for Nigeria. The increase in wheat prices strains the government budget even further, compounding food insecurity. Rising oil prices due to the conflict in Ukraine have a compounding effect: the Premium Motor Spirit (PMS) subsidy placed on gasoline had unintended consequences for the federal budget, rising from the projected 443 billion naira (\$1.06 billion) to 4 trillion naira (\$9.6 billion).<sup>iiii</sup> The pandemic shows no sign of abating. The United States and Europe have reached a plateau in their vaccination campaigns and commit to

donating 100 million vaccines to the United Nations COVAX program. However, most of the leftover vaccines in these countries are Pfizer and Moderna, which require extremely low storage temperatures to remain effective. The United States and Europe renew production of the one-shot Johnson and Johnson vaccine but note that it will take months before production reaches sufficient numbers. The first several months of 2023 see COVAX purchase and rely on leftover AstraZeneca doses as well as Sinopharm vaccines produced by China. In addition, China begins sending direct shipments of its Sinopharm vaccines to its prominent allies, including Nigeria.

The planned presidential elections in February 2023 mark the end of President Buhari's maximum two terms in office, but candidates for his replacement have difficulty organizing their campaigns or face direct suppression and detention at the hands of the state security forces. Several leading candidates are imprisoned on flimsy charges. The leader of the IPOB, Nnamdi Kanu, is the subject of various rumors claiming he returned from exile abroad or that he has been killed by government intelligence forces.<sup>liv</sup> The pandemic and security situation in Nigeria motivates many neighboring countries to shut down borders. Sub-Saharan Africa continues to suffer from the effects of the virus, but mitigation efforts prevent the spread from carrying over to countries in the interior with the same ferocity experienced by those on the coast. In a shocking announcement on January 15th, President Buhari holds a press conference in Abuja in which he declares the suspension of the 2023 elections until the next year. Buhari claims this decision is built on the desire to rewrite the constitution, a plan called for by legal icon Afe Babalola the previous year.<sup>lv</sup> However, unlike Babalola's desire to have the constitution written by a council of impartial experts, Buhari names himself the chair of the committee responsible. Martial law remains stringently in place, although the government is losing control over most rural areas and smaller cities. Protests and violence grow in urban areas at the news of the

suspended elections. The United States, United Nations, and African Union denounce the decision, calling for elections to be reinstated under UN supervision.

The countries on the coasts of East, South and Western Africa are all experiencing severe outbreaks, but those with the largest and most densely populated cities suffer the most. COVAX decides to focus on delivering and administering vaccines in the largest countries and cities across the African continent before broadening the scope to include every country. By March 5 million vaccines a week are arriving in Lagos, Kano and Abuja through the COVAX program. Another 40 million doses enter Nigeria directly from China. The arrival of these vaccines does little to slow the violence around the country, as martial law remains in force and state security forces and armed groups are both responsible for rising civilian casualties. As Nigerians in the largest cities receive vaccinations, the magnitude of the crisis slowly begins to lessen. By June of 2023, President Buhari's government can gradually relax the lockdown policies in the wealthier areas of these cities. However, vaccine hesitancy has become more extreme. The more affluent and educated urban Nigerians are more likely to trust the government and understand the public health value. Massive slums on the outskirts of major cities are difficult to reach, and campaigns to bring the vaccine into these areas are slow. The virus continues to inflict severe damage around the country, but the panic and chaos that characterized the beginning of the year diminish. In the second half of 2023, the government attempts various strategies to encourage the rest of the country to get inoculated. Violence continues to simmer, primarily in the rural regions of the southeast and the grasslands across the center of the country. By the end of the year, approximately 100 million people have been vaccinated, significantly below the threshold of 190 million that experts believe would generate herd immunity and end the pandemic. Reliable



numbers are difficult to ascertain, but public health experts estimate about 1,000 Nigerians a day are continuing to die from the virus.

### *2024-2025: Economic Catastrophe*

In the United States, Ron DeSantis wins the 2023 election and is inaugurated as President in January. He runs on an isolationist platform consistent with the Trump doctrine, and neglects to support democracy or human rights in his foreign policy. The economic consequences of the pandemic and government mismanagement begin to grow clearer. The agriculture sector, which employed two-thirds of the labor force at the start of the pandemic, continues its steep decline as farmers clash with pastoralists in the center of the country and the southern regions in the Niger Delta also struggle.<sup>lvi</sup> Agriculture yields had been declining before the pandemic began for similar reasons. Nigeria produced an average of 50 million metric tons of cassava, accounting for 20% of global production and 46% of West Africa's total.<sup>lvii</sup> In the south, where farmers produce most of the cassava, supply lines have been interrupted by the ESN and most available food has been requisitioned by the IPOB. Overall, in just two years, the total output of the cassava industry has dropped to 40 million metric tons. The United Nations warns of an impending famine and the World Food Programme struggles to prepare a viable method for delivering humanitarian aid in the massive and unstable country.

President Buhari's government lacks legitimacy and faces intense criticism from urban constituents as well as the international community. Pressure rises to deal with the pandemic once and for all, and the government initiates a forced vaccination campaign into the slums and accessible areas of the country. Human rights violations are rampant: those who refuse to get the vaccine are jailed in crowded prisons where forced vaccinations are administered. By the latter half of 2024, social cohesion in Nigeria has all but collapsed. The forced vaccination campaign

in the country combined with declining coronavirus rates around Africa see the overall number of deaths reach their lowest point since the outbreak began. However, the consequences of the pandemic and government crackdown have taken their toll. Economic numbers are difficult to establish, but estimates place the economic contraction at about 7%. Total deaths from the Covid-19 pandemic are thought to approach 1 million, based on excess mortality. These figures are influenced by the security situation and the developing famine. President Buhari remains in power with the tenuous support of his administration, but nationally he commands little authority outside of the main cities.

#### *2026-2030: Atrophy*

Nigeria is no longer the largest economy in Africa, as it is surpassed in 2023 by a recovering South Africa and an Egypt that had marginal impacts from the coronavirus. The regional economy of West Africa is devastated. The World Food Programme has expanded its operations from the northeast of the country to the central and southern regions as well. The petroleum industry exports have declined to \$20 billion, down from \$64.78 billion in 2019.<sup>lviii</sup> The absence of agriculture jobs and the decline of the informal economy leave tens of millions of young people unemployed. Many of the young men begin to leave the cities and return to the countryside. Recruitment for organized separatist movements like the IPOB and militant groups like Boko Haram swell. In the northeast, the latter reemerges with increased strength, and competes with factions for local dominance. Kidnappings are pervasive and provide sources of income for these groups. Refugees fleeing the violence steadily increase, though most remain internally displaced and are not accepted at border crossings into neighboring countries.

By 2025, President Buhari has lost the support of even his most loyal supporters. He is ousted by the military and replaced by the chief of staff, Lt. General Faruk Yahaya. Military

coups occurred twice more before 2030, as the nominal government of Nigeria now administers a rump state. Nigeria is one of seven countries in the ECOWAS that has suffered a military coup in the preceding decade, as hope for the development of democracy and political institutions in the region fades.<sup>lix</sup> The federal government, led by the military, exerts control over a triangle area from Lagos to Benin City to Abuja. Transportation links between these areas are usable but remain susceptible to attacks by bandits and kidnappers.<sup>lx</sup> The negative effects of climate change continue to impact coastal cities. In Lagos, the newly developed Eko Atlantic neighborhood built on land reclaimed from the ocean causes flooding in poorer neighborhoods during the rainy season.<sup>lxi</sup> Neighborhoods for the elites become more insulated from poorer ones, and millions of people are displaced along the coast. Cities like Kano in the north remain independent but anarchic, as Boko Haram dominates the surrounding countryside. The Islamic State - West Africa Province (ISWAP) has also grown in significance, maintaining a brutal rivalry with several smaller jihadist groups as well as Boko Haram.<sup>lxii</sup> Only in the South, in the unrecognized Republic of Biafra, is there a modicum of stability. The remaining petroleum infrastructure and agricultural production provide the governing IBOP with sources of revenue, and Chinese companies have slowly been investing in redeveloping the oil facilities. The International Community continues to supply humanitarian aid to the north and central parts of the country in an effort that many fear will not be resolved in the coming decade. By 2030, Nigeria is characterized by a lack of central authority and a fracturing of the country into smaller states dominated by regional groups competing for space and resources.

## **SCENARIO 2: STAGNATION**

### **Introduction:**

Nigeria in this scenario enters 2030 as a relatively stable country that has emerged from the coronavirus pandemic without serious consequences. The economy has continued its sluggish growth of about 2.5% across the decade, largely because the government failed to diversify away from the petroleum industry and find new sources of revenue to invest in its people. Over the course of the preceding decade, there have been periods of higher growth and economic optimism followed by significant downturns. Nigeria's economy remains vulnerable to shocks, as proven by the impact of political crises in West Africa and the Russia-Ukraine crisis on oil and wheat prices. Inflation has declined from a high of 20% in 2023 but remains in the high single digits and hampers sustainable growth.<sup>lxiii</sup> China overtakes the United States as the largest source of Foreign Direct Investment in Nigeria towards the end of decade and continues to obtain contracts for Chinese companies to further develop the petroleum industry and infrastructure projects. However, many of these projects are slow to come to fruition, and in 2030 most of the infrastructure plans have not been completed. Emblematic of these stalled projects is the construction of railway lines between Lagos-Kano and Lagos-Calabar, vital priorities for the transportation sector and improving real estate values outside Lagos.<sup>lxiv</sup> Portions have been completed, but the country remains disconnected.

The security situation remains unresolved. Boko Haram has faded as an organized threat to the government, but offshoots of Boko Haram such as the ISWAP continue to terrorize the northeast in sporadic attacks. The effects of climate change have increased violence between pastoralist cattle herders and sedentary farmers across the center of the country. The IPOB remain antagonistic in the south, but their ESN military wing rarely clashes directly with government forces and does not severely threaten the petroleum industry or agricultural development in the region. Massive demographic change has continued to strain the health and

transportation sectors, and food insecurity is a major problem in many parts of the country. Essentially, Nigeria has continued its current trajectory, avoiding catastrophic collapse, but failing to take advantage of its massive emerging labor market, natural resources, and cultural assets. This scenario is driven by the confluence of pandemic recovery, low-level conflict in a poor security environment, China's heightened role in the country, and an inability to achieve economic diversification.

### ***The Path to 2030:***

#### *2022-2023: Gradual Recovery*

The global coronavirus pandemic begins to slow down in the second half of 2022 and into 2023. Waves of new variants continue to ripple around the world, but mortality rates significantly decrease as vaccination and booster campaigns continue in the rich world. The human impact of the virus in Sub-Saharan Africa remains surprisingly low, with scientists proposing theories attributing low death-rates to youthful populations and acquired immunities.<sup>lxv</sup> In 2022, the government of Nigeria is able to secure a total of 120 million vaccine doses through COVAX and international partners like China. While some vaccines go unused after expiration, supply chains and methods of delivery are becoming more efficient across the country. Nigeria opens its first vaccine production factories by the end of the summer, producing five million doses each month by the end of the year.<sup>lxvi</sup> China continues to provide substantial doses of its Sinopharm vaccine, accompanied by a sustained public diplomacy campaign from Beijing that begins to repair the fractured relationship between the two countries resulting from the coronavirus and racism against Nigerians in China.<sup>lxvii</sup> This diplomacy sets the stage for renewed Chinese investment in the country and a strengthened economic relations. By the end of 2022, Nigeria has vaccinated over 40% of its population but struggles to combat vaccine

hesitancy in a significant percentage of the population.<sup>lxviii</sup> Hard to reach areas like slums in major cities and rural areas are still experiencing new infections, though the overall public health impact of the pandemic remains relatively low. The same can be said for Nigeria's regional neighbors, who are vaccinating their populations at a slower pace but with similarly low levels of mortality.

The security environment remains poor throughout Nigeria. Kidnappings and banditry, violence from jihadist groups in the Northeast, and clashes between sedentary farmers and pastoralists continue. The federal government proves unable to provide effective security across the country resulting in the emergence of local vigilante groups intent on protecting their communities.<sup>lxix</sup> Democracy and political stability in West Africa remains tenuous. In June of 2022, a second coup attempt is successful and overthrows President Embalo in Guinea-Bissau.<sup>lxx</sup> While troubling, there is tentative optimism as Mali and Burkina Faso make progress towards forming transitional governments. ECOWAS supports the two countries in planning for elections in 2023. The United States continues to support the Nigerian military in their operations against Boko Haram and ISWAP in the northeast. They provide an additional \$5 million for training operations through the Trans-Sahara Counterterrorism Partnership (TSCP) and supply the Nigerian military with A-29 Super Tucano aircraft.<sup>lxxi</sup> The capacity of Boko Haram to maintain consistent operations is blunted, but the ISWAP emerges in its place. Analysts say that many former Boko Haram fighters have shifted their allegiance to the ISWAP. In September 2022, the latter carries out a large attack in Taraba State in a crowded market, killing over one hundred people and injuring far more.<sup>lxxii</sup> The government responds with a campaign of harsh reprisals, claiming that they killed two hundred fighters in a series of operations towards the end of the year.

Approval ratings for President Buhari's government remains low, but they begin to rebound somewhat after the vaccination campaigns.<sup>lxxiii</sup> Going into the 2023 February elections, the President's All Progressive Congress (APC) is in a strong position to win reelection, and President Buhari surprises political observers by endorsing his vice-president Yemi Osinbajo as his replacement and committing to leaving office. The economic recovery from the effects of the pandemic is slow but consistent. Fueled by surprising growth in the agriculture and telecommunications industry, the ongoing decline in crude oil prices is offset and the economy begins to grow at a rate of around 2.5%. This growth, combined with a slight rise in voter turnout to 43%,<sup>lxxiv</sup> allows the APC to win the 2023 election behind new President Osinbajo. He runs his campaign on counterterrorism, fighting corruption and increased government regulation and revenue generation. The base of support for Osinbajo is primarily in southwest and northern Nigeria, in and around Lagos state, Abuja and Kano.<sup>lxxv</sup> The opposition contests the election results and claims serious irregularities in the voting process. International observers condemn the flare up in violence and heavy-handed actions of the security forces, but generally agree that any irregularities did not change the outcome of the election. In the southern Niger delta region, violence instigated by the ESN increases.

President Osinbajo's first term begins with guarded optimism. 2023 witnesses steady growth of about 2.3% as the global economy recovers from the Covid-19 crisis. The Russia-Ukraine crisis is at a stalemate. Russia occupies the Luhansk and Donetsk regions, the front lines have calcified, and large-scale operations are over. The price of wheat peaked in late 2022 at 30% higher than pre-crisis levels but decreased to around 10% by summer 2023. In that time, other suppliers including India and the United States stepped in to replace most of the 17% of Nigeria's wheat imports coming from Russia.<sup>lxxvi</sup> Oil prices have stabilized at \$100 a barrel, and

the effects of Osinbajo's commitment to phase out the PMS subsidy has lessened the fiscal burden on the government. In 2023, the cost of the subsidy is down to 2% of Nigeria's GDP from a high of 4% the year before.<sup>lxxvii</sup> Inflation reaches 20% in the second quarter, but the gradual resolution of global supply issues leads to 13% inflation by the fourth quarter.

#### *2024-2025: Failure to Reform and Outside Shocks*

At the beginning of 2024, close to 95% of Nigerians own a mobile phone and 70% have access to the internet, though access to high-speed broadband remains limited.<sup>lxxviii</sup> China has recovered from the consequences of its "Zero-Covid" policy amidst the pandemic.<sup>lxxix</sup> Though Foreign Direct Investment (FDI) coming from China diminished during the pandemic, President Xi Jinping seeks to reassert Chinese investment abroad. He agrees to provide financing for the Ajaokuta-Kaduna-Kano (AKK) pipeline that had previously been stalled.<sup>lxxx</sup> By the middle of the year, the spike in spending makes China the largest source for FDI in Nigeria, surpassing the United States and rising to \$8 billion. The majority of these investments come through the resumption of other infrastructure projects and focus on coastal rail and port facility development.<sup>lxxxi</sup> The United Nations and international financial institutions continue to warn about potential debt traps created by these loans and investments, but President Osinbajo is ambivalent. The Nigerian government takes several steps that it bills as reform, such as mobilizing a national campaign to educate the population about the importance of paying taxes and investing in greater policing to punish tax evaders. These campaigns have little effect on overall government revenue, but this failure is disguised by the recovery of the oil industry and the revenue that accompanies it. The agriculture sector grows, then stagnates and declines as violence and instability resulting from political forces and climate change takes root in



agricultural areas. Nigeria continues to import a significant portion of its foodstuffs and the susceptibility of Nigeria's economy to external shocks remains apparent.

This susceptibility is exposed by the reemergence of the Ebola virus in neighboring Benin in the second half of 2024. The first case is discovered in August, and quickly rises to 3,000 active cases in the region by the middle of September. Nigeria shuts down its western borders and mobilizes the resources of the Nigerian Center for Disease Control (NCDC) to conduct monitoring and contact tracing. There are under 100 cases that end up crossing the border and preparations by the NCDC and international community in the wake of numerous past health crises prove successful. The crisis lasts 5 months before it is officially declared over. At the end of the year, and before the threat of Ebola has been eliminated, tensions flare between Russia and Ukraine after an offensive by the Ukrainians to retake parts of the Luhansk region. Oil prices spike as new sanctions are imposed by the European Union. Although the PMS subsidy is almost phased out, the lack of oil refineries in Nigeria means the revenues from exports of crude oil are negated by the costs of importing more expensive refined oil. The continued importance of the oil industry to Nigeria's economy, as well as its vulnerability to sudden changes, is largely unchanged. The economy slides into a recession in the final quarter of 2024 and the first quarter of the new year. The emerging population of young people looking for work are hardest hit. Nigeria's Human Development Index (HDI) rating drops for the first time since the middle of the coronavirus pandemic.

In 2026, infrastructure projects continue to develop at a sluggish pace, despite promises from the federal government. China is distracted by increasing tensions with the United States around Taiwan, showing less urgency towards its investments in Nigeria. The dispersion of funding for many infrastructure projects is stalled, but not cancelled. The Lagos-Kano railway

remains unfinished.<sup>lxxxii</sup> Sections of the line from Lagos-Ibadan and Abuja-Kaduna that were completed before the pandemic are now running more efficiently and face fewer disruptions. Increased security measures, electronic booking for tickets, and a sustained advertising campaign implemented by the Nigerian Railway Corporation allow for more passengers to rely on existing lines, and demand increases.<sup>lxxxiii</sup>

President Osinbajo's administration has declined in popularity. Nigeria lumbers ahead without significant changes in government policy towards reforming the economy or security. In rural and hard to reach areas of the country, vigilante groups have continued to fill the security vacuum. The military conducts sporadic airstrikes against jihadist targets around Brono State in the northeast in cooperation with regional actors, but local responses to violence on the ground are organized by these groups. Violence originating from jihadist groups is declining, with only 5 attributable attacks in the first half of the year, but conflict between farmers and pastoralists in the center of the country has been on the rise. The government's support is centered on Lagos State and Abuja. Nollywood, Nigeria's film industry, has been one bright spot, contributing 4.3% of GDP in 2025 compared to 2.3% five years earlier.<sup>lxxxiv</sup> However, economic benefits from this growth has overwhelmingly centered on Lagos, Ibadan, and several other cities nearby. Osinbajo's political base resides in these areas as well.

#### *2026-2030: Liberalization and Corruption*

The effects of these shocks lead the economy to remain below 1% growth through 2026, and President Osinbajo's APC loses the 2027 presidential election to the more conservative People's Democratic Party (PDP). The PDP is elected on a platform of economic liberalization and a return to conservative religious values. The Nigerian electorate desires economic growth, security and prosperity, and the PDP was successful at portraying President Osinbajo as

ineffective on the economy and beholden to global interests. The ascension of the PDP leads to a brief period of detente between the government and separatist forces, as well as the final marginalization of ISWAP. However, the effects of climate change continue to fuel the conflict between pastoralists and sedentary farmers in the heart of the country.<sup>lxxxv</sup> The PDP seeks to liberalize the economy to make it more competitive. They remove taxes and regulations implemented by their predecessors, diminishing government revenue, and clearing the way for a new wave of corruption and skimming off the top. Economic growth briefly rebounds to 2.5% in 2027 and the first half of 2028, before cooling off to below 2% in the final years of the decade.

By 2028, China and the United States have relieved tensions through diplomatic channels and a recommitment by the latter to the One China policy, opening the door for renewed Chinese direct investment into Nigeria. A spate of new contracts are given to Chinese companies amidst this new wave of interest, and opposition leaders repeat growing criticism that the deals are tainted by endemic corruption. Nigerians are concerned that China will not follow through dispensing funding again. International observers accuse the PDP government of skimming off the top. The bombastic President brushes aside the criticism and leans into cultural issues like criticizing same-sex relations, diverting attention from the slowed growth of the Nigerian economy. Major infrastructure projects including rail links along the coast remain unfinished. The liberalization policies of the administration lead to rampant corruption, setting back Nigerian institutional development and transparency by at least 5 years. Inequality increases as GDP per capita remains stagnant, and Nigeria enters 2030 with a similar quality of life as it did a decade before. The country's HDI score stands at approximately 0.54, exactly where it was in 2019 and good for 155th out of the 189 countries evaluated by the UN that year.<sup>lxxxvi</sup>

### **SCENARIO 3: EMERGENCE**

**Introduction:**

Within this scenario, the Nigerian federal election in 2023 ushers in substantial changes in policy. The new administration makes fundamental changes that allow Nigeria to diversify its economy, address significant political and administrative problems, and address persistent security threats. In 2030, Nigeria has experienced an average of 8% economic growth despite difficult geopolitical circumstances and more advanced effects from climate change. Lagos reaches a population of 20 million people and emerges as Africa's cultural and economic capital, surpassing Johannesburg as the wealthiest city by GDP.<sup>lxxxvii</sup> Thanks to a booming technology industry and rapidly expanding entertainment industry, Lagos is one of most important cities on the planet.<sup>lxxxviii</sup> The banking industry capitalizes on this growth to spur a construction boom that slowly replaces massive slums with high-quality apartment buildings connected to a modern plumbing system. At the heart of this boom is a reorganization of local government, with power shifting from the Lagos State Government to the hands of a newly established metropolitan government.<sup>lxxxix</sup> The metropolitan government elects a mayor for the first time since 1975 from the dynamic and well-educated class of Lagos' elite. He implements major reforms relieving the notorious Lagos traffic, improves transparency and tax collection, and welcomes foreign investment.

Nigeria has benefited from the leadership of Lagos as the driving economic force in the country. The security situation in volatile regions of the country is much improved by joint operations within the Economic Community of West African States (ECOWAS) to defeat jihadist groups across the Sahel and deal with the root causes of instability that led to their rise. In addition, the government largely resolved the conflict with IPOB in the southern states by granting greater regional autonomy.<sup>xc</sup> Conflict across the center of the country is a problem

driven by desertification and internalized divisions. Most importantly, Nigeria in 2030 has emerged as a great power in Africa and is emerging onto the world stage. The United States and China both compete to have the greatest influence in Africa's largest and most important state. This competition is primarily economic, though China has contributed surveillance systems and the United States continues to provide military training and millions of dollars in arms sales. Nigeria's political reforms have strengthened ties with the United States and the West. Inequality persists, but substantial progress has been made to put Nigeria on the path to becoming a high-income country by 2060. This scenario is driven by a swift vaccination campaign that hastens the end of the pandemic. In addition, government reform and economic diversification allow Nigerian film, fashion, telecommunications, and agricultural industries to thrive. These drivers create a substantially improved security environment despite continued challenges. Foreign direct investment in Nigeria comes from a diversity of sources, supporting public-private partnerships and rehabilitating the nation's infrastructure and transportation industries.

### ***The Road to 2030:***

#### *2022-2023: Ending the Pandemic, Reforming recovery*

In the second half of 2022 and into the next year, President Buhari's government takes advantage of COVAX support to begin a massive vaccination campaign in the country. Surplus vaccines from countries like the United States and Europe increase the supply, as do millions of doses from China. In addition, government predictions that domestic industry would begin producing vaccines by 2022 proves to be true. The beginning of production in July of 2022, combined with the influx of vaccines from other countries, leads Nigeria to have enough vaccines to inoculate its entire population by the middle of 2023. Vaccination campaigns begin in the major cities and follow timelines laid out by the NCDC. They are accompanied by a

massive public information campaign that recruits local and state leaders to publicly get the shot. The domestic success of vaccine development and the public diplomacy manage vaccine hesitancy to the point that 70% of Nigerians signal their willingness to receive it, up from only 50% in 2021.<sup>xci</sup>

The economic recovery coming out of the pandemic continues to surprise observers. The Nigerian Central Bank (CBN) extends mobile money licenses to include MTN and Airtel and eliminates the unpopular tax on mobile money transactions at the end of the year.<sup>xcii</sup> The poorest Nigerians are the biggest beneficiaries of the tax, simplifying their ability to profit from income generating activities like small-scale farming. The telecommunications industry is more competitive, and prices are already beginning to drop, though deeper internet penetration is slow. The Premium Motor Spirit (PMS) subsidy is eliminated by President Buhari to mitigate the effects of the Russia-Ukraine crisis on the federal budget.<sup>xciii</sup> The price of crude oil increased by 2% from 2022-23, significant enough to maintain government revenues but not enough to drive the recovery. Nigerians end the year looking towards the 2023 elections with optimism, reflected by public opinion polls showing 60% of citizens trusted the government to lead Nigeria out of the pandemic. The Boko Haram insurgency continues to fade following an energized military operation by the government into the northeast region. President Buhari initiates negotiations directly with the IPOB and signals a willingness to allow increased regional autonomy for the Igbo people in the southeast. As a result of ongoing negotiations, the ESN or IPOB affiliates have not conducted any attacks. By the end of 2022 there is real optimism that a lasting peace could be established in the Niger Delta, despite deep wounds and a tenuous trust between the parties. At the same time, pastoralist vs sedentary violence increases. Tensions have been aggravated by the slow and inefficient implementation of the National Livestock Transformation

Plan (NLTP), developed in 2018 in the lead up to the 2019 election.<sup>xciiv</sup> Both the cattle herding and farming communities are frustrated by the response, and confrontation becomes more frequent as climate change reduces the amount of arable and grazable land and population growth leads to confrontation.

In March 2023 the incumbent APC party won a resounding victory in the presidential elections, gaining 5% more votes than they had in 2019, although voter turnout remains well below ECOWAS averages at 50%.<sup>xciv</sup> Behind former governor of Lagos State Asiwaju Bola Tinubu, the political mastermind behind the formation of the APC credited with the election of President Buhari, the APC ran on a platform of human rights, ending conflict and corruption, and reforming the country to be “open for business.”<sup>xcvi</sup> Although allegations of corruption persist from Tinubu’s past time in public office, he recognizes the necessity of reform if the APC is going to remain Nigeria’s leading political party. President Tinubu immediately set about deepening the ongoing negotiation with the IPOB. In addition, he set up a working group to speed the implementation of the NLTP.

Most importantly, Tinubu organizes a summit for local and state leaders across the country for October 1, 2023, Nigeria’s Independence Day. The summit was a historically significant moment and reflected the decades-long trend of Nigerians from many different ethnic and religious groups developing a national identity.<sup>xcvii</sup> Taking place in the federal capital of Abuja, the summit goes on for ten days and brings representatives of the nation’s diverse stakeholders to one place to work out a wide array of issues. A consistent theme from the conference was the desire of most attendees to return Nigeria to a system of regional autonomy. One of the most charismatic speakers was former president of the Nigerian Bar Association (NBA) Dr. Olisa Agbakoba. Dr. Agbakoba spoke passionately about the efforts to implement a

devolved federal system from independence to 1966, only to be halted by the military when power was consolidated in a centralized federal system.<sup>xcviii</sup> In a historic move, President Tinubu endorses this perspective and other ideas for reform. These ideas include establishing metropolitan governments headed by elected mayors, as opposed to the existing order in which the state exercises authority over the cities therein. The summit culminates in the formation of a working group to enact constitutional reform. This working group built on the National Political Reform Conference of 2006 and was tasked with developing a new blueprint for reform to be presented on October 1, 2024.<sup>xcix</sup> The issues at hand include oil revenue sharing, clear responsibilities for education programs, strengthening the judicial system to confront corruption, eliminating the immunity clause for public officials, creating metropolitan government structures, and integration of local military forces under federal jurisdiction.<sup>c</sup> The last issue responded to an important complaint from officials in the Borno state. This state has experienced the worst consequences of Boko Haram and extremist violence, and stipulate that the federal military response has harmed civilians and made the population of Borno feel like they were living under an occupation.

#### *2024-2025: Open for Business, Structural Reform*

Over the course of the next year, President Tinubu signals his commitment to the impending constitutional reform to the world. He establishes increased transparency for all contracts with foreign governments. President Biden is elected to his second term and commits United States foreign policy to rebalance towards Africa. This rebalance includes economic and political issues, and Nigeria is invited to another "Summit For Democracy " in the middle of 2024.<sup>ci</sup> President Biden specifically highlights Tinubu's political reforms to promote the summit, and states that the \$537 consulate being built in the new Eko Atlantic development in Lagos will



be the heart of American foreign policy in Africa.<sup>cii</sup> China continues to compete for contracts to build infrastructure. In 2011, FDI reached a peak in Nigeria of \$8.84 billion then declined to \$3.3 billion just before the pandemic.<sup>ciii</sup> By the middle of 2024, Nigeria was on pace to receive \$14 billion, and anticipated significantly more following the constitutional reforms. China, Europe, and the United States compete for influence, and economic growth averaged 9% in the first half of 2025. Security issues in the central regions of the country continued to decline with the energetic implementation of the NLTP. Many rural citizens have moved to the cities as 60% of the population now lives in urban areas. The government invests \$50 million to enforce the new rules and regulations. Areas for grazing and farming are clearly delineated and law enforcement doubled the number of prosecutions for violations. These processes also benefit from increased transparency and reliable statistics.

Early 2025 witnessed a spike in the development of Lagos. The Eko Atlantic mega-city project becomes a profitable business center for Nigeria. The project created an artificial peninsula out of reclaimed land from the Atlantic Ocean that juts out from Victoria Island, the heart of Nigeria's megacity. The development created residential areas for 250,000 residents and brought in billions of dollars through investments and large corporations building headquarters there.<sup>civ</sup> In the same period, the Lagos light rail was finally completed after over a decade of construction.<sup>cv</sup> The light rail cut traffic congestion in the city by half and represented a significant achievement for relations between Nigeria and China, the largest funding source for both projects. Twenty-four-hour power and sanitation projects finally came to fruition.<sup>cvi</sup> The Lagos economy grew by and estimated 12% in 2023-2024, and 2025 saw an increase to 15%. This dramatic growth provided the engine driving Nigeria's economic success. Other cities, now connected by better rail and highway links, have followed Lagos' lead. The megacity is a symbol

of optimism for the people of Nigeria, and is the beating heart of African fashion, music, and culture. The benefits of this growth still go disproportionately to the upper classes, but better transport, access to the internet, and economic optimism spread to poorer areas as well. The constitutional reform conference reconvened to finalize the implementation of the reforms in October of 2025. Weeks of negotiation change the nature of the reforms on the margins, but within a month the government was ready for its implementation. By the end of the year, a massive shift in the transparency, structure, and efficiency of the Nigerian national government came into being.

#### *2026-2030: Emergence*

The rest of the decade sees Nigeria grappling with implementation of national reforms. Behind the strong leadership of President Tinubu and the APC, these reforms are gradually integrated into the federal system. Universal compulsory education through secondary school is instituted in 2026 alongside a gradual increase in education spending by the federal government. 20% of the federal budget is now invested in education, up from a paltry 6% in 2021.<sup>cvii</sup> The government partners with large banks and corporations to supplement these costs by sponsoring individual schools, especially in Western Nigeria. As a result of the Biden Administration's foreign policy rebalancing towards Africa, 50,000 Nigerian students are attending universities in the United States as part of exchange programs.<sup>cviii</sup> ECOWAS has reemerged as a powerful regional force, with Nigeria at the helm. No military coups have been successful in West Africa in several years, and cooperation on economic, migration and security issues is higher than it has ever been. Democratic political institutions are slow to develop in Burkina Faso, Niger, and Mali, with the military maintaining substantial power in politics, but continuity of civilian governments is stable, supported by Nigeria's active regional diplomacy.

In the 2027 election, the people of Nigeria provide a mandate for the government, reelecting Tinubu in a landslide and gaining seats for the APC. Turnout reached 60% for the first time in Nigeria's history, as rising optimism and economic conditions make voters more engaged. The biggest issue continues to be security and inequality. The remnants of Boko Haram and ISWAP are effectively eliminated by an ECOWAS military coalition, but the human toll in states like Borno remains high. Economic inequality between different classes and regions in Nigeria are severe. New divides between the prosperous areas near the large cities and the interior, rural areas are emerging. Humanitarian aid is still a necessity in many parts of the country. Despite progress, the World Food Programme estimates that at least 5 million people in the northeastern states of Borno, Yobe and Adamawa are food-insecure.<sup>cix</sup> The same can be said for the "Middle Belt" across central Nigeria, and parts of Edo state in the south. Violence waned with the reforms, but available space for a growing population of both cattle herders and farmers continued to shrink. The immediate effects were even faster rates of urbanization. By 2030, 60% of Nigerians lived in cities, up from 51% five years earlier.<sup>cx</sup> Despite the persistent inequality, from 2027-2030 Nigeria achieves GDP growth rates over 10%. The total GDP in 2030 is \$1.5 trillion and approaching \$6,000 per capita. Nigeria is the 11th largest economy in the world, featuring Africa's premier music, fashion, and film industries. Lagos has an estimated population of 30 million people and has emerged as a global city, featuring corporate headquarters and wealthy expatriates, especially in the new district of Eko Atlantic.

### **Observations and Implications:**

These three scenarios reveal two drivers to be more urgent and impactful than the rest. First and foremost is the urgent need to effectively deal with the Covid-19 pandemic. Africa, and Nigeria in particular, has yet to see catastrophic death rates, although recent research has shown

that the disease has spread through the population, with around 65% of West Africans holding Covid-19 antibodies.<sup>cxii</sup> This suggests that Nigeria could emerge from the pandemic without vaccinating a large majority of the population, and is more dependent on the effects of the pandemic on the global economy. It is a valid question whether committing vast public health resources to counter Covid-19 when diseases like malaria, for example, are killing more Nigerians. To abandon vaccination campaigns and allow unchecked spread, however, represents an enormous risk that would likely lead to negative outcomes for Nigeria, West Africa, and the rest of the world. In the *Fragmentation* scenario, a new variant of the virus does spread across Africa and finds Nigeria extremely unprepared. Although mortality from the disease is not as catastrophic as the worst waves in India, the United States, or Europe, its effects are significant enough that the government cannot ignore the threat. Existing fault lines are fractured, misinformation and distrust spread, and other important priorities are pushed to the side. The pandemic is a direct driver of President Buhari's decision to postpone elections, eventually leading to a military coup, recession, and deterioration of the security environment. The *Emergence* scenario envisions a robust response to the pandemic that builds trust in the government and allows Nigeria to focus on other important priorities, while in *Stagnation* Covid-19 diminishes because of factors largely unrelated to the domestic response. Regardless, the impacts of the pandemic drive Nigeria's policies at home and engagement with international actors. The first and third scenarios also illustrate the driving role Covid-19 will have regarding election outcomes in 2023.

The second driver that emerges from the scenarios to be of primary importance is the security environment. With different forms of violence from the Northeast to the Southwest, and everywhere in between, the fault lines of conflict in Nigeria are pervasive. Each scenario

describes a country that has failed to completely eradicate this conflict. Rather, the most favorable outcome, in *Emergence*, conflict is mitigated by developing a broad strategy that addresses the underlying factors leading to violence. President Tinubu and the APC recognize the inherent flaws in the Nigerian system and engage with dissatisfied groups in implementing constitutional reform. The military is used for limited operations in conjunction with regional partners to confront jihadist groups in the Northeast. Elsewhere, however, the summit to reform the constitution convenes farmers, pastoralists, the IPOB, and other areas that have been ignored. In both *Fragmentation* and *Stagnation*, on the other hand, the government relies on military force exclusively. The consequences in the first scenario are drastic: President Buhari enacts martial law and takes a hardline, driving a deteriorating security environment, military coup, and the dissolution of Nigeria as a viable state. In the second, the government still relies on force, but effectively outsources policing in the center and south of the country to vigilante groups. Both scenarios are plausible in that they continue existing policy, and either sustain or aggravate the underlying conditions of conflict. All three scenarios show how climate change and regional conditions will exacerbate insecurity in Nigeria. A proactive and engaging policy from the government is the only viable way to mitigate this insecurity, and *Emergence* provides an example of how it may succeed.<sup>cxii</sup>

### *Implications for U.S. Foreign Policy*

In the first speech by a member of the Biden Administration articulating US foreign policy towards Africa, Secretary of State Antony Blinken spoke at the ECOWAS Headquarters in Abuja. In a shift from the previous administration's view that African nations should steer clear of China, he stated: "I want to be clear: the United States doesn't want to limit your partnerships with other countries. We want to make your partnerships with us even stronger. We

don't want to make you choose. We want to give you choices.”<sup>cxiii</sup> This policy is in line with the administration's broader approach to China, where competition and collaboration are prioritized, with confrontation only when necessary.<sup>cxiv</sup> It also underscores the fundamental lessons that the US should take from these scenarios to pursue its interests when engaging with Nigeria: it must recommit to democratic values, at home and abroad, lead the effort to end the Covid-19 pandemic and prioritize sustainable economic engagement over military support.

On the campaign trail and in the White House, President Biden has said that democratic values sit at the heart of his foreign policy. In his first days in office, Biden “committed to a foreign policy that unites our democratic values with our diplomatic leadership, and one that is centered on the defense of democracy and the protection of human rights.”<sup>cxv</sup> With regards to Nigeria, it is imperative that the US takes these words to heart. Democracy is one of the principal competitive advantages that the US has compared to China or Russia. In Nigeria, an Afrobarometer poll from 2018 found that 69% of Nigerians prefer democracy to any other form of government, in line with most other African nations.<sup>cxvi</sup> In the *Emergence* scenario, Nigeria's relative success is built on a healthy democratic transition from President Buhari to his successor Tinubu. The ruling APC party takes the initiative to further strengthen Nigerian democracy by implementing inclusive constitutional reforms. These two steps sit at the foundation of the country's ability to move forward and generate substantial progress. Nigeria's heightened role and participation in ECOWAS becomes a source of strength and regional stability. Its ability to respond to the needs of Nigerians empowers entrepreneurship and makes the country less vulnerable to external shocks. In *Fragmentation*, the state of democracy goes in the other direction. Buhari's decision to postpone elections sets the stage for a military coup. The DeSantis Administration's reluctance to promote democracy at home or abroad compounds this

deterioration. In *Stagnation*, the distrust over the legitimacy of elections deepens antipathy between groups and contributes to economic malaise and exacerbating conflict. To promote its own interests, the US must protect its own democracy. Passing the John Lewis Voting Rights Act and reforming the Electoral Act are two important steps. Countering disinformation is another. Strengthening America's democracy will give moral legitimacy to diplomatic engagement abroad, promoting US and Nigerian interests simultaneously.

Second, the Covid-19 pandemic offers an enormous opportunity to reassert American leadership around the world. All three scenarios illustrate how important it is for Nigeria to emerge from the pandemic as quickly as possible with the least damage. The first scenario, *Fragmentation*, shows the calamitous results if a new wave of the virus finds the country unprepared and unprotected. The second and third scenarios illustrate how avoiding such a wave is a baseline for Nigeria to move forward in any meaningful way. It does not guarantee positive development, but the alternative almost certainly means Nigeria will be devastated economically, socially, and from a security perspective. Each scenario also demonstrates that Nigeria cannot acquire enough vaccines on its own to protect its citizens should another wave or variant arrive. Although plans are in the works to produce mRNA vaccines domestically, there is no plausible scenario in which Nigeria can produce enough doses to vaccinate enough of its population to achieve herd immunity. The US again holds a competitive advantage against its rivals, with the Pfizer, Moderna, and J&J vaccines providing much better protection against Covid-19 than Russia's Sputnik or China's Sinopharm.<sup>cxvii</sup> Taking the lead to purchase and provide enough vaccines for the rest of the world would represent diplomacy in its most powerful form: saving people's lives. If the vaccines are purchased and delivered through COVAX, the legitimacy of the United Nations and international cooperation would be strengthened, a welcome bonus.

Finally, these scenarios provide strong evidence for US foreign policy to prioritize economic engagement over military support. The Global War on Terror has led to the US military having a large, and ever increasing, footprint in Nigeria and the Sahel region. An over-reliance on counterterrorism operations has killed thousands of civilians, undermined support for domestic governments, and most importantly: it has not stopped the violence.<sup>cxviii</sup> In *Stagnation*, US military support for the Trans-Sahara Counterterrorism Partnership (TSCP) succeeds in depleting Boko Haram, but other extremist groups like ISWAP fill the vacuum. *Emergence* is the only scenario where such groups are marginalized over the long-term. In that scenario, economic and political engagement strengthens the links between government and the governed. US foreign policy must recommit to building sustainable economic relationships that supports Nigeria and the entire ECOWAS community.



Nigeria Map:cxix



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