

Market Intelligence Brief

Nigeria

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1 Executive Summary

Having overtaken South Africa several years ago, Nigeria is now Africa's largest economy. Despite periods of volatility due its dependence on oil export revenues, the country has seen significant economic progress over the last couple of decades, with the size of its economy almost tripling since 2000 in real terms. However, robust economic growth hasn't fully translated to living standards, with Nigeria ranking 161 out of 189 countries in the United Nations Human Development Index in 2020, with high levels of poverty and relatively low levels of educational attainment persisting.

Alongside having the largest economy, Nigeria is also Africa's most populous country with a population of around 216m, making it the sixth most populous country in the world. Looking ahead, with its fertility rate expected to remain considerably higher than its replacement rate, fast-paced population growth is set to continue. According to the United Nations Population Division, the Nigerian population will grow to around 263m by 2030, and further to just over 400m by 2050, making it the third most populous country in the world, ahead of the US and only behind India and China. As well as its scale and projected growth, its age composition is another remarkable feature of Nigeria's population, with a median age of just 19 and 54 per cent of the population under the age of 20 at present.

Nigeria's booming youth population has caused significant capacity issues within its education system. Indeed, although thousands of new education institutions have been built in recent years, a lack of places throughout its schooling and higher education systems has resulted in Nigeria having the highest number of out-of-school children in the world. Further, the quality of available facilities is often poor, teachers are inadequately trained and education participation rates are low by international standards. A major contributory factor has been historic under-funding of the education sector, with government expenditure on education consistently at less than half the level recommended by UNESCO over recent years.

Capacity and quality constraints within the domestic higher education system have led to a large number of Nigerian students pursuing higher education qualifications abroad. According to estimates from UNESCO, around 71,000 Nigerian students travelled abroad to study at the higher education level in 2019, making it by some distance the largest outbound international student market in Africa. In fact, in 2016, the volume of outbound students was even higher at around 97,000, before challenging macroeconomic conditions weighed on the ambitions of many prospective international students. Looking ahead, robust growth in outbound students is expected to resume and according to higher education enrolment specialists, IDP Connect, while much recruiting activity continues to concentrate in and around Lagos, there is also strong demand in other cities, including Suleja and the capital Abuja.

Traditionally, the UK and the US have been the preferred destination for Nigerian students, together hosting around one third of total Nigerian outbound students in 2019 according to UNESCO. However, over recent years and in large part due to the affordability squeeze caused by domestic macroeconomic conditions, Nigerian students have shown increasing interest in alternative destinations, including other Sub-Saharan African countries as well as China due to the availability of generous scholarship options.

According to HESA, there were 5,765 Nigerian students enrolled on UK TNE and distance learning courses in the 2020/21 academic year (excluding Oxford Brookes students). This represents an increase of 32 per cent compared to 2019/20 but is still almost 10 per cent below the number of TNE enrolments recorded in 2016/17. Still, in 2020/21 Nigeria ranked as the second largest UK TNE market in Africa, marginally ahead of South Africa (5,440), but well behind Egypt where there were almost 24,000 enrolments. In 2020/21, almost 70 per cent of UK TNE provision in Nigeria was via distance learning, with around 90 per cent of provision taking place at the postgraduate level.

With higher education demand expected to continue to grow and outstrip domestic capacity in the years ahead, Nigerian authorities see online and distance learning as the most feasible and affordable way in which the country can meet current and future demand for higher education and so there is considerable scope for expansion of UK TNE provision to Nigerian students in future. Indeed, Nigeria is one of five priority countries identified in the UK's International Education Strategy, with a UK government delegation visiting Nigeria in May 2022. During the visit, a Memorandum of Understanding (MoU) was signed. The purpose of this MoU is to collaborate on a project to improve outcomes in entrepreneurial education as part of the British Council's Going Global Partnerships: Innovation for African Universities programme. The MoU will also provide a platform that will further strengthen the implementation of TNE guidelines.

2 Introduction

This report was produced by the British Council's *Insight and Engagement* team with external research support provided by Oxford Economics.^[1] This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Nigerian policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto Nigeria's education system and student population, as well as the economic and demographic factors, and policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of Nigeria's education system – including student mobility, transnational education programmes and research collaboration – and also highlights national level education projects and partnerships between the UK and the UAE.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in Nigeria.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **John McNamara, Global Head of Research, Education Insight Hubs** at email john.mcnamara@britishcouncil.org

^[1] www.oxfordeconomics.com/

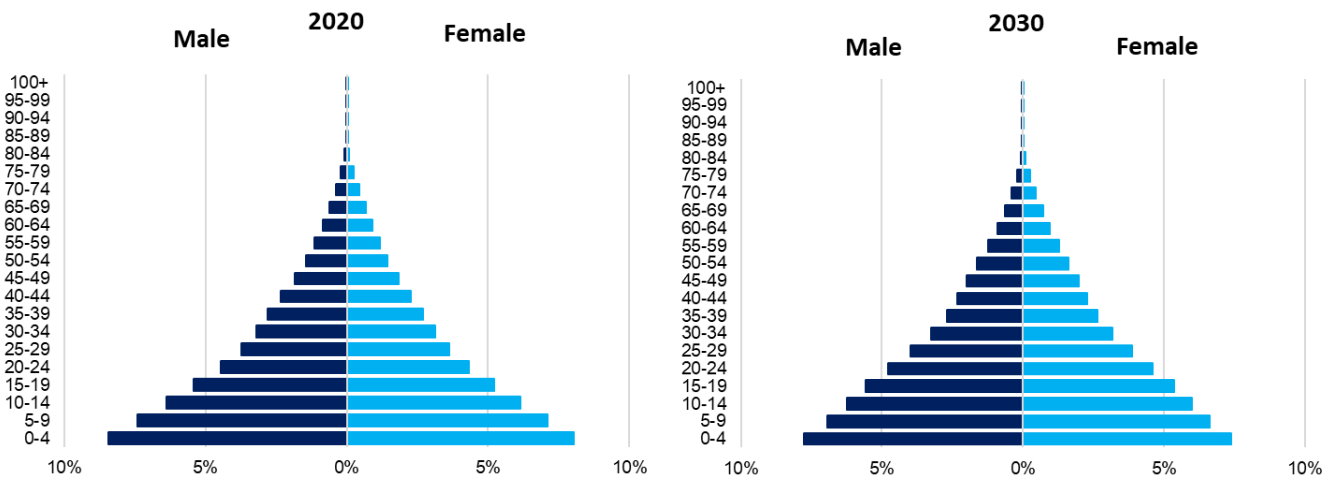
3 Macro Environment

3.1 People

With a population of around 216m, Nigeria is the most populous country in Africa, and recently overtook Brazil to become the sixth most populous country in the world. Looking ahead, although the rate of population growth is expected to gradually slow, the United Nations project that the Nigerian population will have grown to around 263m by 2030, and further to just over 400m by 2050, making it the third most populous country in the world, ahead of the US and only behind India and China.¹

Nigeria is also one of the youngest countries in the world with a median age of just 19² and 54 per cent of the population under the age of 20. By 2030, the Nigerian population is expected to age slightly, with the share of the population aged below 20 expected to fall marginally to 52 per cent. Meanwhile, the share of the population aged over 65 is expected to remain low, up slightly to 2.9 per cent in 2030, from 2.7 per cent in 2020.

Figure 1: Nigeria’s population pyramid, 2020 and 2030



Source: UN Population Division

As at 2020, Nigeria’s student age population (15-29) stood at 55m, and is expected to expand substantially to 74m by 2030, representing annual average growth of 3 per cent and underpinned by continued strong expansion in each of the 15-19, 20-24 and 25-29 sub-categories. Contributing to the fast-paced expansion and youthfulness of the Nigerian population has been the country’s high fertility rate, which currently stands at around 5.3. The fertility rate has however been on a gradual downward trend over recent decades and stood

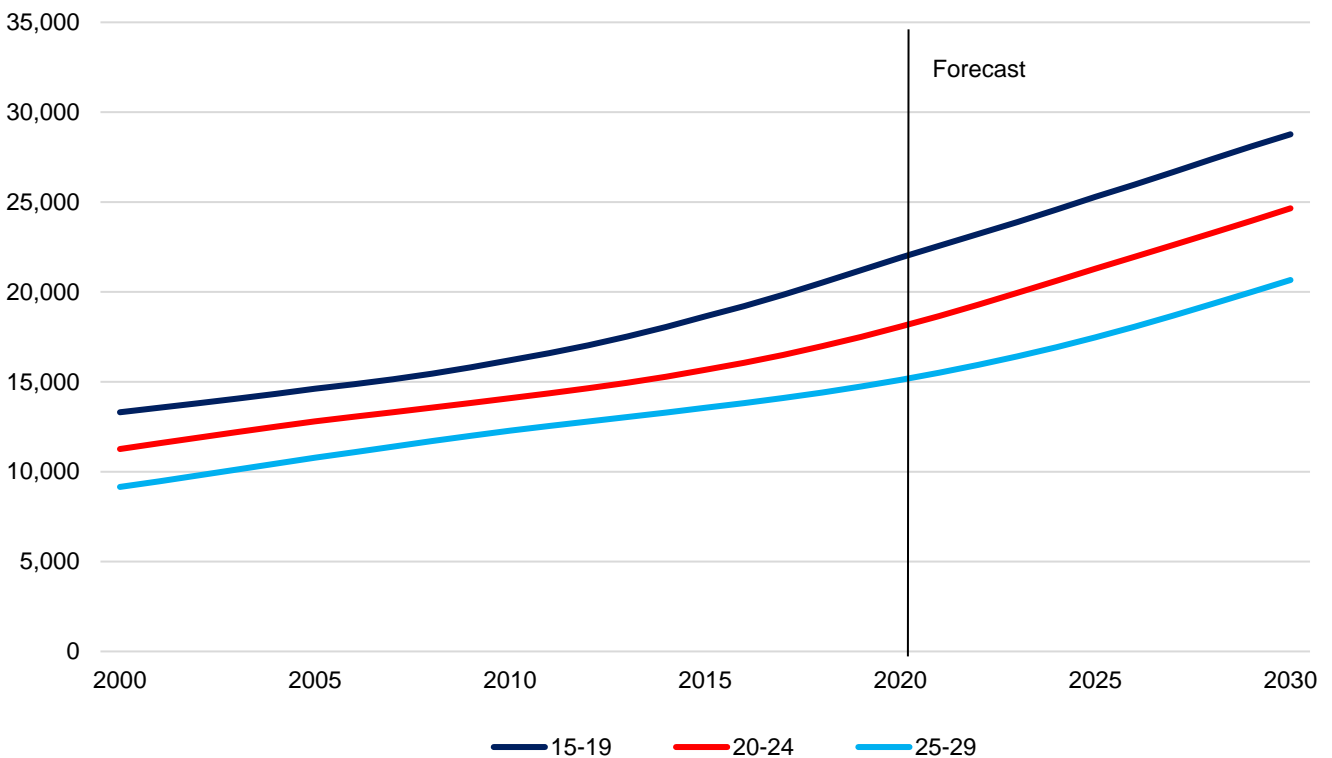
¹ World Population Prospects, United Nations Population Division, 2019, <https://population.un.org/wpp/>

² Median age, CIA World Factbook, 2022 <https://www.cia.gov/the-world-factbook/field/median-age/country-comparison>

above 6 between 1950 and 2000. However, despite the expected continuation of this gradual downward trend, Nigeria’s fertility rate is projected by the United Nations to remain very high by global standards in future, and well above its replacement rate which is currently estimated at around 2.5.

While in many cases a youthful and growing population presents economic opportunity and the prospect of a “demographic dividend” for countries, demographers have argued that this is unlikely to be realised in the case of Nigeria. The demographic dividend generally occurs when a period of high fertility begins to slow, with gains coming as the population matures and enters the workforce and rising longevity at older ages becomes widespread. Increased tax revenue from the growing workforce then allows the government to increase spending in ways which will boost productivity and long-term economic growth. Expert demographers argue that the demographic dividend occurs when a nation’s working age-population reaches about two-thirds of the total and when the population aged under 15 represents less than 30 per cent of the total. Even by 2030, the working age population in Nigeria is expected to account for only 56 per cent of the total while the under 15 population is expected to account for 41 per cent of the population, with Nigeria unlikely to reach the population structure required to benefit from a demographic dividend for several decades due to its persistently high fertility rate.³

Figure 2: Nigeria’s student age population (000s)



Source: UN Population Division

³ Nigeria falls short of reaping reward from its population bulge, *Financial Times*, 2019, <https://www.ft.com/content/69f907ce-e127-11e9-b8e0-026e07cbe5b4>

In 2020, the United Nations estimated that just over 50 per cent of Nigerians lived in urban areas, which is considerably above the Sub-Saharan African average of 41 per cent. By 2030, the urbanisation rate is expected to increase to just below 60 per cent, and to 70 per cent by 2050. The country comprises 36 states and one Federal Capital Territory, Abuja. Lagos, the country's commercial capital, is by some way the largest city in Nigeria, with a population of just over 15m. It is estimated that around two-thirds of the population of Lagos live in slums, with no access to roads, clean water, electricity or waste disposal.⁴

Nigeria is an extremely diverse country with more than 250 ethnic groups. Around 54 per cent of the population is Muslim, 35 per cent are Christian and 11 per cent are Roman Catholic. The north of the country is predominantly Muslim, consisting of a variety of Sufi, Salafi, and Shi'a communities. Christianity, mainly Catholicism and Anglicanism, is dominant in the south-eastern states. English is the official language in Nigeria, but there are over 500 additional indigenous languages used also.⁵

3.2 Economy

Despite periods of volatility, Nigeria's economic growth over the last decade has been strong and the country became the largest economy in Africa following the release of rebased GDP statistics in 2014. Nigeria is classified by the World Bank as a lower-middle income country and is Africa's largest oil exporter with crude oil representing around 80 per cent of its total exports and half of government revenues.

While the oil industry remains vital in relation to Nigeria's external and fiscal balances, it has contributed less than 10 per cent of GDP over recent years, with growth in the industry disappointing in recent years, mainly due to an escalation in oil theft and infrastructure damage. As a result, economic growth has primarily been driven by non-oil sectors, including manufacturing, telecommunications, construction and merchandise trade. Agriculture's contribution to nominal GDP has remained broadly stable over the last couple of decades, hovering around 25 per cent, with the sector remaining a salient provider of employment and growth. By contrast, industry's contribution to nominal GDP has been in decline, falling from around 40 per cent in the early 2000s to just over 20 per cent in 2021. At the same time, the services sector's contribution to nominal GDP has grown considerably since 2000, with its share of GDP rising from around 35 per cent up to over 50 per cent by 2021.

In 2020 after the onset of the Covid-19 pandemic, Nigeria experienced its deepest recession since the 1980s, with services and industry hit especially hard. This was in part caused by lockdown measures limiting mobility and restricting people's ability to go to work. Additionally, with oil prices plummeting by more than 50 per cent in the first half of 2020, exports and government revenues fell sharply. However, the economy began to bounce back in the second half of 2020, with GDP surpassing pre-pandemic levels in 2021. The labour market, however, was hit harder, with the unemployment rate rising from around 25 per cent in early 2020 to 33 per cent by the end of the year, with more than 20m jobs being lost. Employment levels have

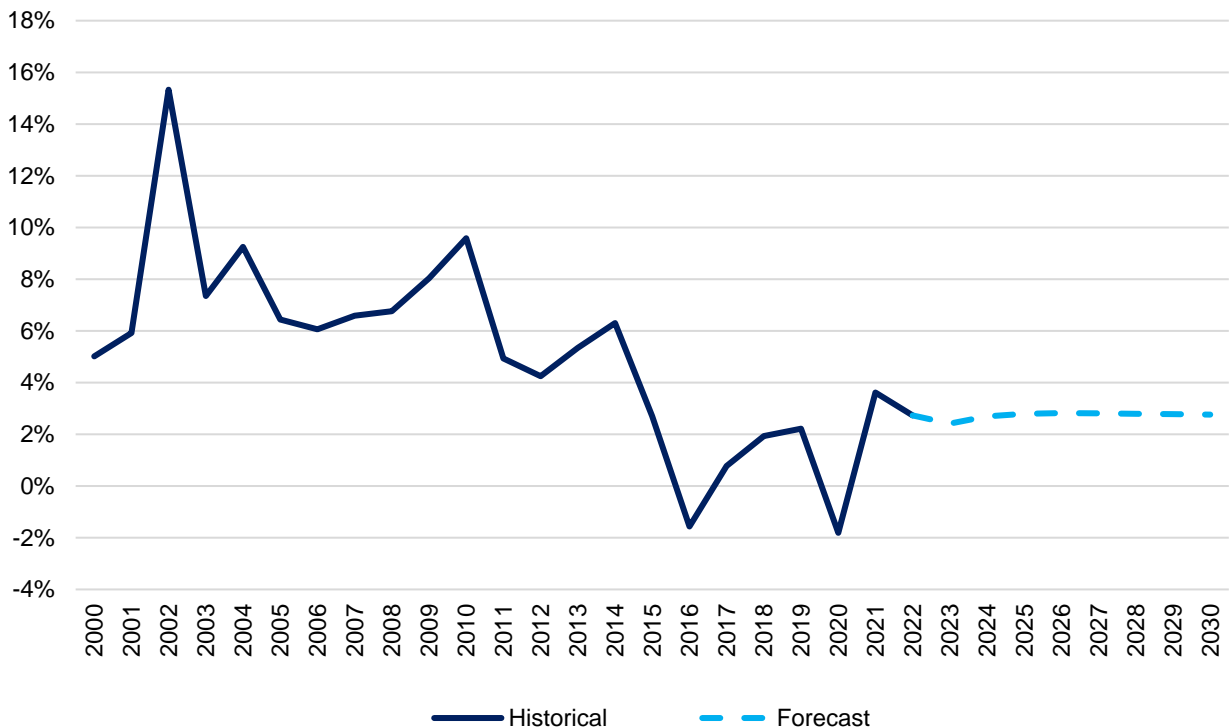
⁴ Lagos population, *World Population Review*, 2022, <https://worldpopulationreview.com/world-cities/lagos-population>

⁵ Nigeria, *CIA World Factbook*, 2022, <https://www.cia.gov/the-world-factbook/countries/nigeria/#people-and-society>

rebounded since, but full recovery to pre-pandemic levels is not expected until 2024 according to Oxford Economics.

In the medium term, Oxford Economics forecasts GDP growth of around 3 per cent per year for Nigeria, with the country one of the few expected to financially benefit from the war between Russia and Ukraine. Indeed, despite the sub-par performance of the oil industry of late, with oil prices rising above \$100 per barrel for the first time since 2014, export and government revenues are booming. The robust pace of economic growth projected over the next decade is expected to underpin a significant expansion of middle-income households within the country. In 2020, there were an estimated 430,000 households with an income of US\$35-70,000 in Nigeria, which is expected to more than double to 910,000 households by 2030, which should act as strong driver of continued growth in outbound student mobility from the country over the next decade. Nigeria's GDP per capita is also expected to see strong growth in the period to 2030, rising to around US\$2,390 (current prices) by 2030 from US\$1,940 in 2020, which will see Nigeria's GDP per capita remain more than 30 per cent higher than the Sub-Saharan African average.

Figure 3: Nigeria's real GDP growth



Source: Haver Analytics / Oxford Economics

With its foreign exchange reserves highly dependent upon oil export revenues, oil price volatility has historically made the naira exchange rate vulnerable to shocks in the wider global economy. One of the ways Nigerian authorities have tried to ensure stability is through maintenance of the exchange rate since its collapse in the context of recession between 2014-2016. Consequently,

the naira exchange rate remained very stable from mid-2016 until early 2020, at around 360 per US\$. However, with oil prices plummeting after the onset of the Covid-19 pandemic and foreign exchange reserves coming under strain, the Central Bank of Nigeria has devalued the currency significantly since March 2020 and it is currently trading at around 460 per US\$. Looking ahead, Oxford Economics sees exchange rate risk remaining high in Nigeria. Foreign exchange liquidity is expected to remain tight and could prompt the exchange rate to buckle should reserves drop unexpectedly.

3.3 Government and education policy

Nigeria is a constitutional democracy of 36 states with a federal government based in the capital city of Abuja. After declaring independence from the UK in 1960, the country experienced multiple military coups. However, after military dictator Sani Abacha died in 1998, the military facilitated a democratic transition, with Olusegun Obasanjo elected president in 1999 on the platform of the Peoples' Democratic Party (PDP). A challenge to the PDP emerged in 2013 when four opposition parties merged to form the All Progressives Congress (APC). The APC picked the former military ruler Muhammadu Buhari as its presidential candidate, and he beat Goodluck Jonathan in the March 2015 election to produce Nigeria's first democratic change of government. The Buhari administration was slow out of the blocks during a time when the country was faced with a severe oil price shock, with a Cabinet appointed only five months after the president was inaugurated. Buhari was nonetheless successful in securing a second term, beating the PDP's Atiku Abubakar in the 2019 presidential elections. Nigeria's 2019 general election was the largest such democratic activity ever undertaken in Africa.

The education sector is overseen by the Federal Ministry of Education (MoE), with local authorities responsible for implementing state-controlled policy. The National Policy on Education provides the legislative guidelines that set standards, procedures and implementation plans that ensure educational development and delivery of education in Nigeria. The first National Policy on Education was published in 1977 but has been revised several times, with the latest version published in 2014.⁶ However, since declaring independence in 1960, Nigeria's central government has been dominated by instability and as a result, it has been difficult to successfully implement a unified set of education policies.⁷

In its Education 2030 Framework for Action, UNESCO recommends that governments should allocate at least 15-20 per cent of public expenditure to education.⁸ However, despite promises by President Buhari to increase education spending significantly, recent budget allocations have fallen well short, at below 8 per cent over the last five years. This persistent under-funding of education in Nigeria has led to a wide range of challenges across the education system. For example, according to UNICEF, even though primary education is officially free and compulsory, about 10.5 million of the country's children aged 5-14 years are not in school, with only 61 percent of those aged 6-11 regularly attending primary school. The impact of insurgency

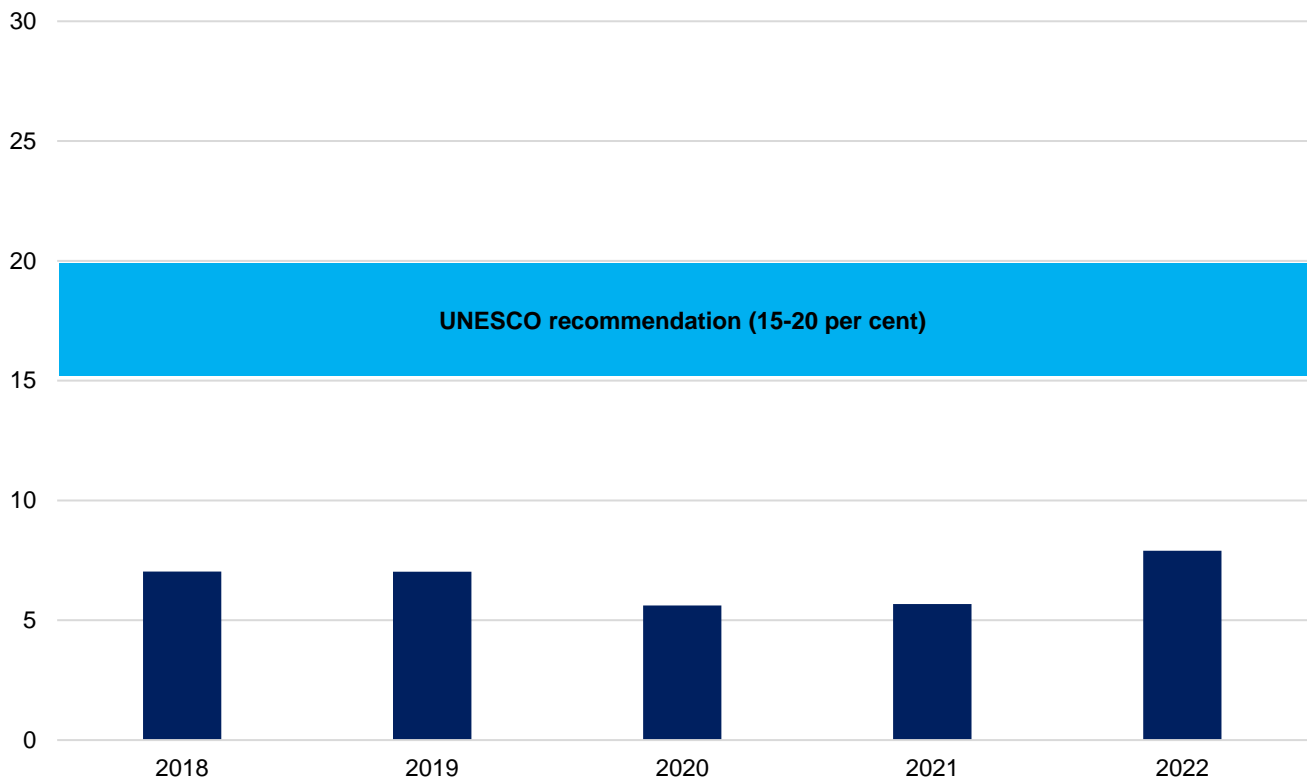
⁶ National Policy on Education, *Federal Ministry of Education*, 2014, <https://education.gov.ng/wp-content/uploads/2020/06/NATIONAL-POLICY-ON-EDUCATION.pdf>

⁷ A Critical Analysis of Nigeria's Educational System, *Global Journal of Human-Social Science*, 2019, <https://files.eric.ed.gov/fulltext/ED610967.pdf>

⁸ Education 2030 Framework for Action, *UNESCO*, 2016, <https://unesdoc.unesco.org/ark:/48223/pf0000245656>

in the northeast of the country has made the situation even more challenging there, with at least 802 schools remaining closed, 497 classrooms listed as destroyed, and another 1,392 damaged but repairable in the states of Borno, Yobe, Adamawa.⁹

Figure 4: Nigeria government expenditure on education (per cent total government expenditure)



Source: World Bank / Premium Times Nigeria

⁹ Nigeria Education, UNICEF, 2022, <https://www.unicef.org/nigeria/education>

4 Domestic Education Environment

4.1 Overview

The education system in Nigeria is divided into kindergarten/early years, primary, secondary and tertiary education. The MoE is responsible for overall policy formation and ensuring quality control but is primarily involved with tertiary education. School education is largely the responsibility of local (primary) and state (secondary) governments.

Nigeria's education system is overburdened by strong population growth, with around 54 per cent of the population currently under the age of 20. Although thousands of new education institutions have been built in recent years, ongoing capacity issues have resulted in Nigeria having the highest number of out-of-school children in the world. Further, the quality of available facilities is often poor, teachers are inadequately trained and education participation rates are low by international standards.¹⁰ These fundamental challenges throughout the country's education system have contributed to Nigeria having relatively low literacy rates in its population. In 2018, its youth literacy rate stood at 84 per cent, compared to the Sub-Saharan Africa average of 93 per cent, according to the World Bank.

Within Nigeria, there is a distinct regional difference in participation rates in education between the oil-rich south and the impoverished north of the country. Gender, like geography and poverty, is also an important factor in the pattern of educational marginalisation in Nigeria, with more than half of girls not in school in some states in the North of the country. The education deprivation in northern Nigeria is driven by various factors, including economic barriers and socio-cultural norms and practices that discourage attendance in formal education, especially for females.

Lack of capacity has also been an issue historically in the higher education sector. However, since 1980, the number of recognised universities in Nigeria has grown significantly, from 16 to 217 which has significantly reduced, if not eradicated, the problem. But while efforts at increasing capacity by building new universities have generally been positive for access in absolute terms, they have also created issues related to instructional quality. Nigeria's institutions and lecture halls are severely overcrowded, student to teacher ratios have increased sharply, and faculty shortages are chronic. Over the past decade, strikes have become an almost ritual occurrence at Nigerian universities, disrupting lectures, causing delayed graduations, the loss income for university staff, and further eroding the already low trust in the education system. The introduction of private universities, which typically have better infrastructure and resources, has gone some way to alleviating these problems, but are much more expensive and so are outside the reach of most Nigerian students.

Given the inherent capacity and quality issues within its domestic education system, large numbers of Nigerian students have travelled abroad for the purposes of study in recent years, and in many cases, with great success. For example, in the US, more than half of Nigerian

¹⁰ Education in Nigeria, *World Educations News + Reviews*, 2017, <https://wenr.wes.org/2017/03/education-in-nigeria>

immigrants (54 per cent) were most likely to occupy management positions — surpassing 39 per cent of the US-born population and 32 per cent of the total foreign-born population, according to 2017 data from the Migration Policy Institute. Further, Nigerians are twice as likely to hold a bachelor's degree compared with 31 per cent of the total foreign-born population and 32 per cent of the US-born population.¹¹

4.2 Early years, primary, secondary

Since legislation was passed in 1976, education has been compulsory for all Nigerian children aged 6 to 15. This raised primary school enrolment dramatically, increasing by 37 per cent between 1970 and 1980.¹² In 2008, the Nigerian government introduced the 9-year basic education curriculum which aimed to expand access to and increase the quality of education throughout Nigeria, raising child literacy rates and improving human capital development.¹³

Pre-tertiary education in Nigeria is administered at the federal, state and local government levels and is overseen by the MoE which is currently mandated by the National Policy on Education (2014). Guided by the legislative procedures and academic standards set out in the government's National Policy, the MoE is responsible for the formation and implementation of education policy as well as quality control. Pre-tertiary education is split into three stages: pre-primary (1 year), compulsory basic education (6 years of elementary and 3 years of junior secondary) and post-basic/senior secondary (3 years). Although overseen by the MoE, elementary and junior secondary schooling is largely operated at the local and state government level, giving institutions autonomy over education policy. Take up of early childhood education is relatively low within Nigeria, with just over one-third of children aged 36-59 months receiving early childhood education at present, according to UNICEF.

English is Nigeria's official language, and until recently was the language of instruction at all levels of education. However, in late 2022, the Nigerian government approved a new National Language Policy that mandates the use of local languages as the language of instruction for primary school pupils, instead of English. Under the new policy, after the exclusive use of local languages for the first six years of schooling, the mother tongue is then to be combined with English at the junior secondary level.¹⁴

Nigeria ranks 29 out of 112 countries in the English First English Proficiency Index (EPI), with 75 per cent of Nigerians under the age of 25 being proficient in English.¹⁵ When compared to other African countries, Nigeria ranks third, behind only South Africa and Kenya where English is the predominant medium of instruction at all education levels.

¹¹ 3 facts you didn't know about Nigerian students in the US, *Study International*, 2021, <https://www.studyinternational.com/news/nigerian-students-in-the-us/>

¹² Nigeria History & Background, *Education Encyclopaedia*, 2022, <https://education.stateuniversity.com/pages/1100/Nigeria-HISTORY-BACKGROUND.html#:~:text=In%201976%2C%20Nigeria%20passed%20a,from%2037%20percent%20in%201970.>

¹³ Universal Basic Education Commission (UBEC), 2022, <https://ubec.gov.ng/>

¹⁴ Nigeria junior schools to teach in local languages, not English, *Aljazeera*, 2022, <https://www.aljazeera.com/news/2022/12/1/nigeria-junior-schools-to-teach-in-mother-tongues-not-english>

¹⁵ Nigeria EF EPI, *EF English Proficiency Index*, 2021, <https://www.ef.com/wwen/eipi/regions/africa/nigeria/>

In elementary school (grades one to six), the national curriculum includes subjects such as English, mathematics, Nigerian language, basic science and technology, religion and national values, and cultural and creative arts. In grade four, students can take lessons in pre-vocational subjects such as home economics, agriculture and entrepreneurship. During elementary school, academic performance is assessed regularly and students are awarded the Primary School Leaving Certificate upon completion of grade six, with students then progressing to junior secondary school.

In 2020, there were almost 33,000 junior secondary schools in Nigeria, providing education to 3.1m males (53 per cent of total enrolment) and 2.7m females (47 per cent of total enrolment).¹⁶ After nine years of basic education (grade nine) students take the Basic Education Certificate examinations. To ensure that students gain a breadth of qualifications, they are expected to take examinations in 10-13 subjects, including mathematics and English.

Upon completion of compulsory education, students can attend senior secondary education which lasts for three years (grade 10 to 12) and is offered by both public and private education institutions. According to the MoE, in 2020 there were almost 4.5m students enrolled at the 21,688 senior secondary schools, 54 per cent of which were male. The 2014 national curriculum reforms stipulate that students at public schools must take four core subjects and four additional subjects which can include vocational training. This new approach was implemented to increase the employability of new graduates and to reduce the high levels of youth unemployment in Nigeria. At the end of the 12th grade, students take the Senior School Certification Examination to assess academic performance in their chosen subjects. There are currently two exam boards, the West African Examination Council and the National Examination Council.

Students who are enrolled at private education institutions can take other courses including the U.S. K-12, International Baccalaureate or the Cambridge International Examination curricula. These courses lead to the globally recognised International General Certificate of Secondary Education (IGCSE). Some private education institutions also offer Nigeria's national curricula.

4.3 Technical & vocational education and training

Upon completion of primary education, students have the opportunity to take an alternative academic pathway, attending one of the country's technical and vocational education and training (TVET) institutions. According to UNESCO, there are five main types of TVET institutions in Nigeria, including technical colleges (171 institutions), vocational enterprise institutions and innovation enterprise institutions (235 institutions), monotechnics (99 institutions) and polytechnics (123 institutions). All TVET institutions are monitored by the National Board for Technical Education (NBTE) which is responsible for the regulation, supervision and accreditation of TVET programmes at both the secondary and post-secondary levels.¹⁷

¹⁶ Secondary Education, *Federal Ministry of Education*, 2020, <http://www.fmebasic.intellisys.xyz/index.php/secondary-schools>

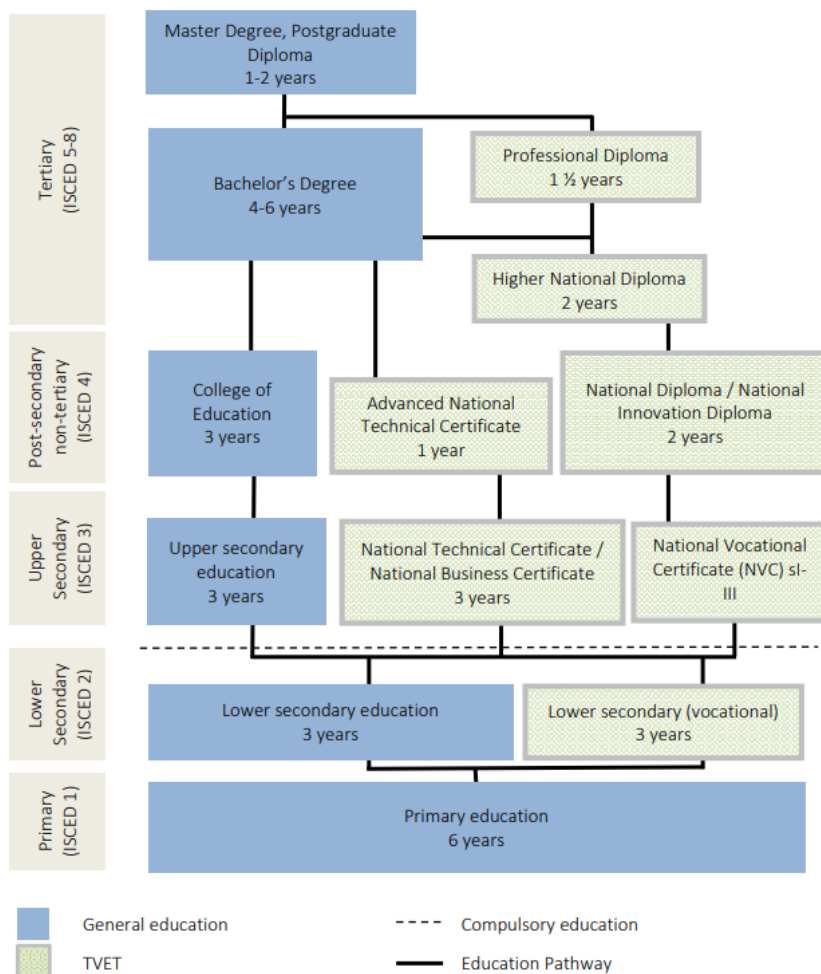
¹⁷ TVET Country Profile, *United Nations*, 2019, https://unevoc.unesco.org/wtdb/worldtvtdatabase_nga_en.pdf

At the junior secondary level, students can enrol on training courses in areas such as welding, joinery, garment making or computer science at one of Nigeria's Technical Colleges. Following this, students who successfully pass the junior school certificate examination can pursue work or embark on further TVET programmes at the senior secondary level. Currently, there are two courses available to students, the National Vocational Certificate and Trade Tests and the National Technical Certificate/National Business Certificate Programme. Typically, these courses can last up to three years and are taught at one of the technical colleges, polytechnics or vocational and innovation enterprise institutions.

At the post-secondary level, there are four types of TVET courses available to students, which last up to two years. These include the National Diploma (National Innovation Diploma), the Advanced National Technical Certificate (Advanced National Business Certificate), the Higher National Diploma and the Professional Diploma.

There is also a range of non-formal TVET programmes offered by the NBTE, the National Commission for Mass Literacy, the Adult and Non-Formal Education and the National Directorate of Employment. These courses range from arts and crafts to livestock management.

Figure 5: TVET in the Nigerian education system



Source: UNESCO

4.4 Higher education

Higher education in Nigeria is offered by its 217 universities, 205 colleges¹⁸, 59 polytechnics¹⁹ and 36 monotechnics.²⁰ Established in 1962, the National Universities Commission (NUC) is responsible for coordinating the development of Nigeria's universities by supporting their financial and educational needs. There is currently a total of 106 publicly run universities in Nigeria of which 49 are Federal and 57 are State.²¹ In response to the rapid population growth in Nigeria and the lack of public funding for new state universities, there has been a marked increase in the number of private universities, of which there are now 111, accounting for over half of all universities in the country.²²

Three of Nigeria's universities are ranked in the top 1,000 of the Times Higher Education World University Rankings, with the highest-ranking institution being the University of Ibadan (401-500th). The next highest ranking is the University of Lagos (501-600th), followed by the Covenant University (601-800th).²³

To gain a place at one of Nigeria's higher education institutions (HEI), students must sit the Unified Tertiary Matriculation Examination. For most university courses, students need a score of at least 200 (out of 400) to secure a place, although this differs across degrees and institutions, dependent on their internal screening policies and the demand for courses. The JAMB is responsible for designing entrance examinations as well as coordinating the allocation of students to universities. In 2020, over 2.1m candidates registered for the examination, the highest number since the introduction of the examination.²⁴ The rapid increase in the student-age population and subsequent surge in demand for university places over recent years has caused competition for limited places to increase markedly. As a result, universities have raised entrance requirements and private universities have raised the price of degree programmes.

The latest publicly available statistics published by the NUC show that in 2019 there were 1.8m full-time undergraduate students enrolled at Nigeria's universities. The majority (65 per cent) of students were enrolled at Federal universities, followed by State universities (30 per cent) and private universities (5 per cent). Male enrolment at university was 7 per cent higher than female enrolment, with the largest disparity seen at federal universities where males accounted for 58 per cent of total undergraduate students.²⁵

Inadequate funding, shortage of academic staff, ineffective training, corruption and poor allocation of funds are the key factors constraining the development of Nigeria's higher education system at present. At the higher education level, universities lack sufficient funding to engage in research, thus producing graduates with outdated skills and knowledge. These

¹⁸ List of Accredited Colleges of Education in Nigeria, *MySchoolGist*, 2022, <https://www.myschoolgist.com/ng/colleges-of-education-in-nigeria/>

¹⁹ List of All Federal, State and Private Polytechnics, in Nigeria, *MySchoolGist*, 2022, <https://www.myschoolgist.com/ng/list-of-accredited-polytechnics-in-nigeria/>

²⁰ List of Approved Monotechnics/Specialised Institutions in Nigeria, *MySchoolGist*, 2022, <https://www.myschoolgist.com/ng/monotechnics-in-nigeria/>

²¹ List of Universities, *National Universities Commission*, 2022, <https://www.nuc.edu.ng/nigerian-universities/federal-universities/>

²² Private Universities, *National Universities Commission*, 2022, <https://www.nuc.edu.ng/nigerian-universities/private-universities/>

²³ Top Universities in Nigeria, *Times Higher Education World University Rankings*, 2022, <https://www.timeshighereducation.com/student/where-to-study/study-in-nigeria>

²⁴ JAMB registers 2.1 million, warns varsities against portal admission, *Punch*, 2020, <https://punchng.com/jamb-registers-2-1-million-warns-varsities-against-portal-admission/>

²⁵ Statistical Digest, *National Universities Commission*, 2019, <https://www.nuc.edu.ng/>

issues have been compounded by the historic shortage of academic staff and ineffective training programmes.

5 International Education

5.1 Student mobility

According to estimates from UNESCO, around 71,000 Nigerian students travelled abroad to study at the higher education level in 2019, making it by some distance the largest outbound international student market in Africa, and the 14th largest in the world. However, after growing every year since UNESCO records for Nigeria began in 1998, the volume of outbound students declined for three consecutive years between 2017 and 2019, after peaking at around 97,000 in 2016. In fact, in 2016, Nigeria ranked as the fifth largest outbound international student market globally, only behind China, India, Germany and South Korea.²⁶

The decline in outbound international student flows from Nigeria in the 2017-19 period has been primarily attributed to challenging macroeconomic conditions for prospective mobile students. Specifically, economic recessions in 2016 and 2017 triggered sharp increases in unemployment, while at the same time, the naira depreciated sharply, falling to a value of less than 470 per US\$ in the first quarter of 2017 from a value of around 200 per US\$ just two years earlier. The consequent sharp decline in the international purchasing power of Nigerian households was further compounded by government restrictions on the amount of foreign exchange available to the public, making it difficult for students to pursue education abroad.

Historically, the majority of Nigerian international students have chosen to study in the UK and the US, who together hosted around one-third of total Nigerian outbound students in 2019 according to UNESCO. However, over recent years and in large part due to the affordability squeeze caused by domestic macroeconomic conditions, Nigerian students have shown increasing interest in alternative destinations. For example, in 2019, almost one in five Nigerian outbound students studied in other Sub-Saharan African countries, such as South Africa, Ghana and Benin. Meanwhile, China has also emerged as an increasingly popular destination for Nigerian students due to the availability of generous scholarship options for prospective students.²⁷

Looking at the UK's recruitment of Nigerian international students, after remaining largely stable at around 18-19,000 for several years between 2009/10 and 2014/15, a considerable decline was observed for four consecutive years thereafter, with the number of inbound Nigerian students falling to 11,825 in 2018/19, which was almost 40 per cent below the peak level seen in 2013/14.²⁸ The decline was broadly attributed to the economic downturn in Nigeria and the resulting reduction in government scholarships, as well as the UK's tightened post-study work visa requirements from 2012.

In 2019/20, with the naira stabilising and economic conditions gradually improving, the volume of Nigerian students on higher education programmes in the UK recovered to just under 14,000, representing an increase of 18 per cent on the previous year. In 2020/21, despite the onset of

²⁶ UIS Database, *UNESCO Institute for Statistics*, 2022, <http://data.uis.unesco.org/>

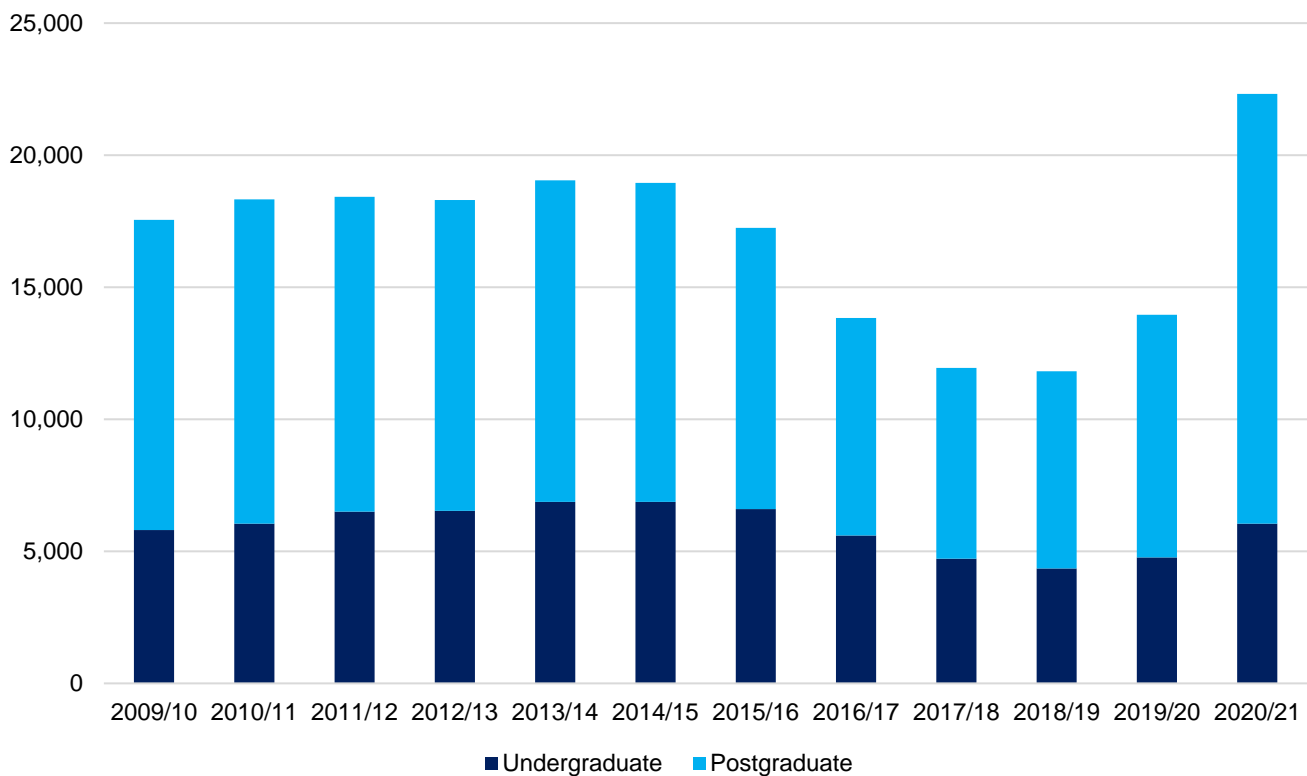
²⁷ Nigeria: Students look beyond the "Big Five" for study, *The Pie News*, 2021, <https://thepienews.com/news/nigeria/>

²⁸ Higher Education Statistics Agency, 2022, <https://www.hesa.ac.uk/>

the Covid-19 pandemic, the number of Nigerian students in the UK surged further, recouping the losses seen over previous years and reaching a record high of 22,320, with the reintroduction of the Graduate Route from summer 2021 a key driving force behind the increase.

Over the last decade, Nigeria has primarily been a postgraduate market for UK HEIs, with an average of two-thirds of total higher education enrolments being at the postgraduate level. Nigerian postgraduate students may prefer the UK to other destinations due to the shorter duration of master’s programmes (one year compared with at least two years in the US and Canada), reducing overall tuition costs, with improved opportunities for scholarships and strong ties with UK research also important in this context. In the 2020/21 academic year, the postgraduate share of total enrolments increased to almost 73 per cent, which is the highest share seen since HESA records began in 2002/03.

Figure 6: Nigerian students in HE programmes in the UK

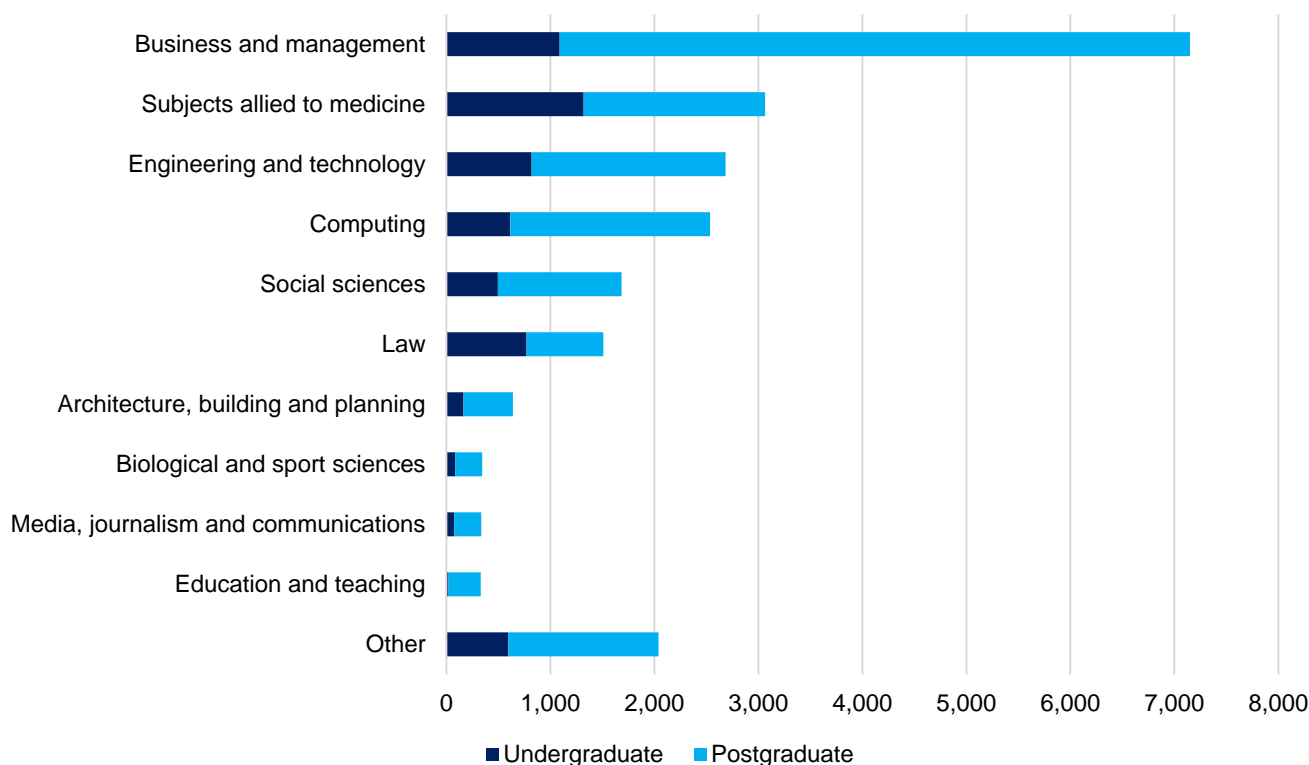


Source: HESA

In terms of subject areas, business and management was by some distance the most popular broad subject area with Nigerian students at postgraduate level, with just over 6,000 enrolments in 2020/21. Next came computing (1,920 enrolments), engineering (1,865), subjects allied to medicine (1,745) and social sciences (1,190). At the undergraduate level, there was a broad degree of similarity in terms of the leading subject choices, with subjects allied to medicine ([which includes nursing](#)) the most popular choice with 1,320 enrolments, followed by business and management (1,090), engineering and technology (820), law (770) and computing (615).

Looking back over the last five years, there has been little change in the leading subject choices by Nigerian students, with four of the top five subject choices at both undergraduate and postgraduate level remaining the same in 2020/21 as compared to 2015/16.

Figure 7: Subjects studied by Nigerian HE students in the UK, 2020/21



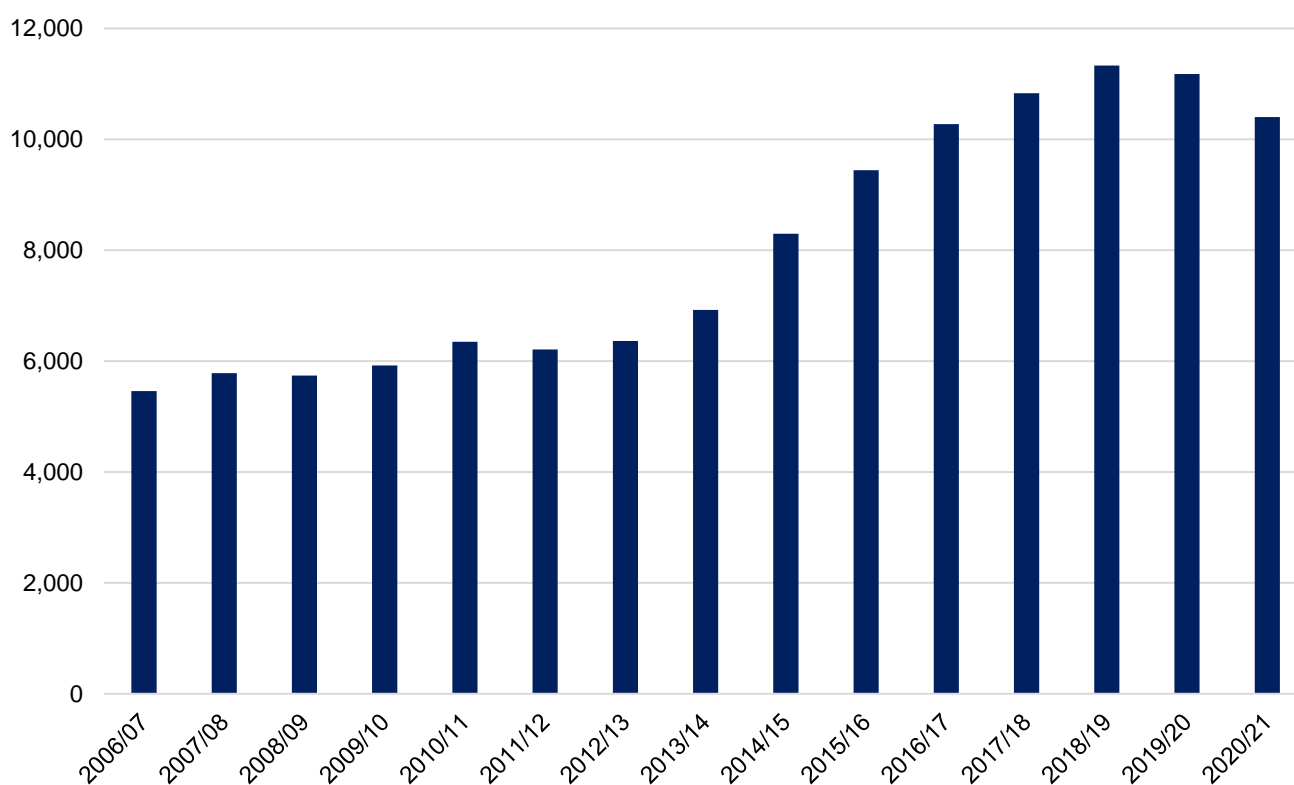
Source: HESA

Over the last two decades, Russell Group institutions have consistently accounted for around 20 per cent of all Nigerian students enrolled at UK HEIs. However, after showing a remarkable degree of stability over a long period, the Russell Group share of total Nigerian enrolments declined slightly in 2019/20 before dropping more sharply to just 12 per cent in the 2020/21 academic year, which was the lowest share on record. This indicates that the recent resurgence in Nigerian enrolments at UK HEIs has been almost exclusively driven by non-Russell Group universities, with the volume of Russell Group enrolments still well below previous peak levels, despite the total number of Nigerian enrolments at UK HEIs reaching a record high in 2020/21.

Alongside the UK, the US has historically been a leading destination for Nigerian international students. After remaining stable at around 6,000 students for several years, the volume of Nigerian students studying in the US picked up and grew steadily from around 6,400 in 2012/13 to a peak of just over 11,300 in 2018/19. Growth in Nigerian enrolments in the US then stalled in 2019/20, before falling by 7 per cent in the 2020/21 academic year with Covid-related travel restrictions combined with tightened visa restrictions and the anti-immigration climate under the Trump administration contributing to the downturn over the last couple of years.

However, despite the recent downturn, in 2020/21 Nigeria remained by some distance the largest African international student source market for the US and ranked as the 11th largest source market for the US globally (excluding OPT students). Looking ahead, the Biden administration has sought to provide a more accommodative environment for international students, including the cancellation of a proposal to limit international student visa to four years, which is likely to lead to a resurgence in the growth of international students flows from Nigeria to the US in future.²⁹

Figure 8: Nigerian HE enrolments in the US



Source: IIE (Note: OPT students excluded)

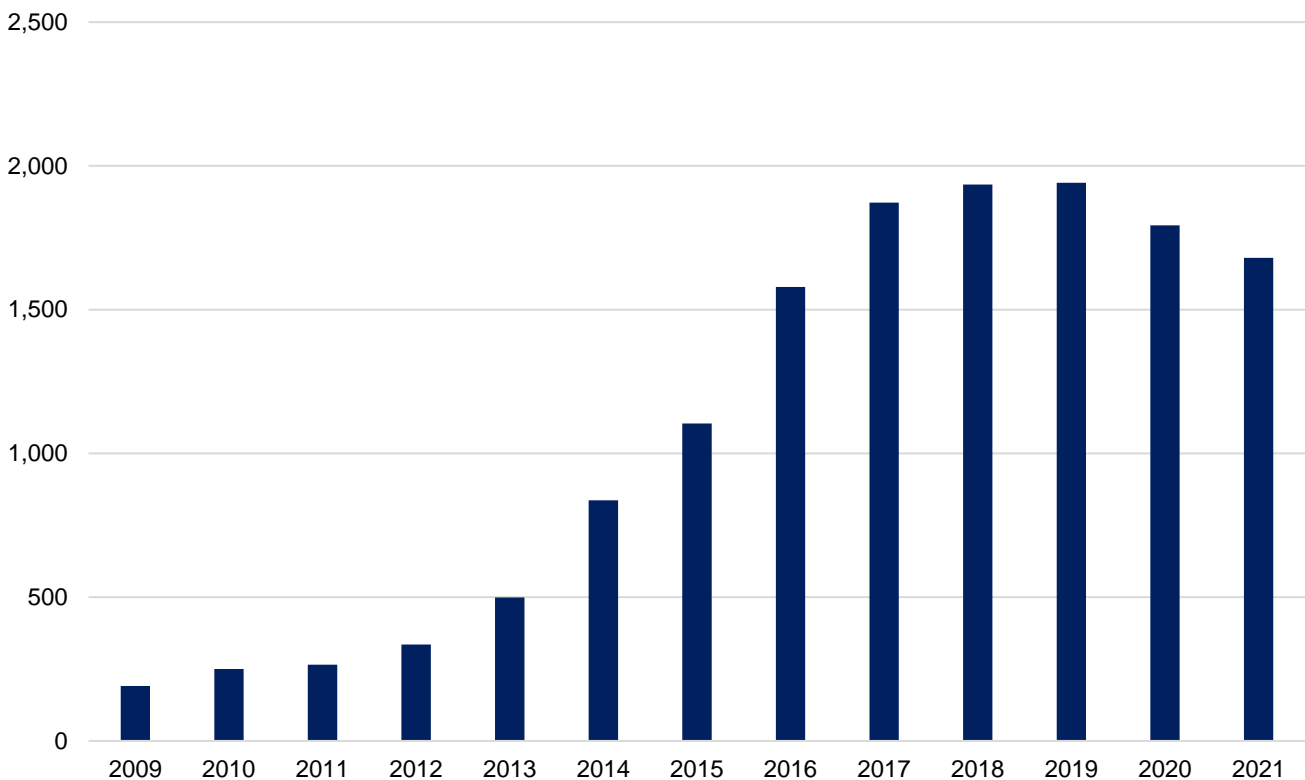
Although still a relatively small host market for Nigerian international students compared to the UK and US, Australia has experienced very strong growth in Nigerian inbound students over the last decade. In 2009, there were less than 200 Nigerian international students enrolled at the higher education level. However, after 10 consecutive years of growth, the number of Nigerian enrolments had increased to just below 2,000 in 2019, representing a ten-fold increase over the decade. Contributing to this strong growth, the Australian government, through its embassy and trade agency AusTrade, has been active in promoting Australian higher education in the Nigerian and West African markets over recent years. AusTrade has a dedicated West African

²⁹ Four-year international student visa limit reversed, *Study Group*, 2021, <https://blog.studygroup.com/four-year-international-student-visa-limit-reversed-by-biden>

office based in Accra, Ghana and the Australian government offers scholarships through the Australia Awards.

However, after peaking at around 2,000 students in 2019, declines in Nigerian international students studying in Australia were recorded in 2020 and 2021, with the volume of student enrolments down to 1,680 by 2021, a decline of around 13 per cent compared to the 2019 level. Given its academic year starts in February, inbound student flows to Australia were largely shielded from the impact of the pandemic in 2020, and as such the decline seen in 2020 was likely related to the recent resurgence of Nigerian student flows to the UK due to the reintroduction of the Graduate Route. By contrast, in 2021, the highly restrictive border control and international travel policies employed by the Australian government after the onset of the Covid-19 pandemic was the driving force behind the decline. However, in late 2021, the government temporarily extended work rights for international students and is offering other incentives such as visa application fee refunds to entice international students back, which could help facilitate a return to the upward trajectory of student flows from Nigeria to Australia in the years ahead.³⁰

Figure 9: Nigerian HE enrolments in Australia

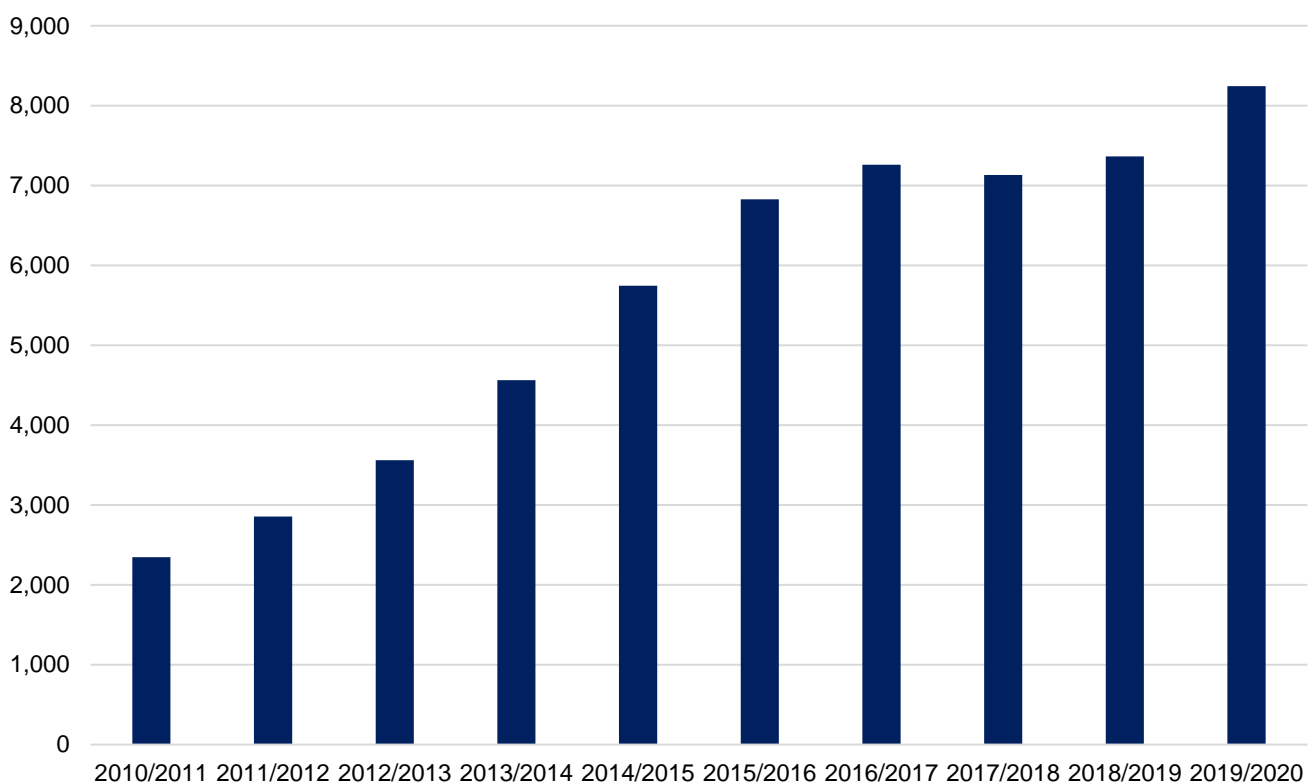


Source: AusTrade

³⁰ Australia: International enrolments down 17% in 2021, *ICEF Monitor*, 2022, <https://monitor.icef.com/2022/03/australia-international-enrolments-down-17-in-2021-but-visa-applications-now-trending-up/>

Over the last decade, Nigerian student enrolment in Canada has grown rapidly, with Canada investing heavily in gaining a foothold in the Nigerian market. In 2010/11, Nigerian higher education enrolments in Canada stood at around 2,300 and after several years of consistent growth, had reached almost 7,300 in the 2016/17 academic year. In the following two years, growth in enrolments stagnated, attributed to increasingly restrictive and prolonged visa practices for prospective Nigerian students, with Nigeria’s visa approval rate found to be consistently below that of other major Canadian source markets. Canada has however taken steps to smooth visa processing for Nigerian students with the introduction in 2020 of a Nigeria Student Express pilot, which aims to reduce processing times for study permit applications from eight weeks to 20 days or less and, less explicitly, to reduce rejection rates for Nigerian study visa applications.³¹ In 2019/20, Nigerian higher education enrolments in Canada began to grow again, rising above 8,000 for the first time on record, with Canada now beginning to compete with the US as the second most popular destination for Nigerian international students, behind the UK.

Figure 10: Nigerian HE enrolments in Canada



Source: StatCan

At present, there is very little consolidated data about international students studying in Nigeria, with neither the government nor UNESCO publishing data on the scale of inbound student

³¹ Demand-side data provides further evidence of shifts in Nigeria study abroad, *ICEF Monitor*, 2022, <https://monitor.icef.com/2022/03/demand-side-data-provides-further-evidence-of-shifts-in-nigerian-study-abroad/>

mobility to the country. However, the NUC statistical digest lists the proportion of foreign students at all accredited universities. Of the 157 universities covered, only two have a foreign student population of more than 5 per cent of the total enrolment. That is, the African University of Science and Technology, Abjua and Nile University of Nigeria, Abjua, both have 22 per cent foreign students. The vast majority of the rest of the universities in Nigeria have less than one per cent foreign students in their overall student populations.³²

5.2 Transnational education and distance learning

According to HESA, there were 5,765 Nigerian students enrolled on UK TNE and distance learning courses in the 2020/21 academic year (excluding Oxford Brookes students). This represents an increase of 32 per cent compared to 2019/20 but is still almost 10 per cent below the number of TNE enrolments recorded in 2016/17. Still, in 2020/21 Nigeria ranked as the second largest UK TNE market in Africa, marginally ahead of South Africa (5,440), but well behind Egypt where there were almost 24,000 enrolments. In 2020/21, almost 70 per cent of UK TNE provision in Nigeria was via distance learning, with around 90 per cent of provision taking place at the postgraduate level.

With its young and rapidly growing population, expanding middle class, and the country's ambition to build a globally competitive economy, higher education demand in Nigeria is set to grow. However, the country's higher education capacity is insufficient to meet the growing demand and online and distance learning is seen as the most feasible and affordable way in which the country can meet current and future demand for higher education.³³

Within Nigeria, the NUC has developed guidelines (“Guidelines for Cross-border Provision of University Education in Nigeria”) to provide a framework for quality provision in cross-border university education. These guidelines set out the processes and requirements for registration/licensing, accreditation, monitoring and evaluation of programmes delivered in Nigeria through TNE. The guidelines provide for three models:

- Twinning and articulation agreements, covering partnership models between Nigerian and overseas universities that are recognised and accredited by authorities in the home country. Students are required to spend a minimum of two semesters at the home campus of the overseas university.
- The branch campus model, where a private university is founded following NUC guidelines. Programmes must be of comparable standard to those offered at the home campus and meet quality assurance requirements of Nigerian universities.
- The open and distance learning model, excluding programmes offered exclusively online, where courses must comply with standards and criteria of the Guidelines for Open and Distance Learning in Nigerian Universities. Currently, there are limits on the academic programmes that can be offered by ODL.

³² Statistical Digest 2018, *National Universities Commission*, 2019, <https://education.gov.ng/nuc-2018-statistical-digest/>

³³ UK looks to Nigeria for opportunities in TNE, *The Pie News*, 2021, <https://thepienews.com/news/uk-looks-to-nigeria-for-opportunities-in-tne/>

So far, engagement from foreign higher education providers has been slow, perhaps owing to the political uncertainty and economic volatility seen in Nigeria over recent years, alongside the still developing infrastructure and quality assurance framework for the provision of TNE in Nigeria. However, in the years ahead as the economic and political environment within the country stabilises, Nigeria is expected to become a major TNE market in the international landscape.

6 UK Cooperation

The UK government published its International Education Strategy in March 2019 and identified Nigeria as one of five priority countries where there is significant potential for bilateral growth in the international higher education sector. As part of this effort, a UK government delegation, led by UK International Education Champion Sir Steve Smith, visited Nigeria in May 2022. During the visit, the British Council and the NUC signed a Memorandum of Understanding (MoU) on TNE. The new agreement aims to encourage the exchange of educational, scientific and cultural knowledge and expertise whilst developing both nations' higher education research capacity.³⁴ The partnership has been financially backed by a £600,000 grant which will be used to support systemic change in 20 Nigerian universities and organisations. It is hoped that the MoU will improve both countries' school leadership and assessment methods, provide British and Nigerian students with greater access to high quality education opportunities and increase the offering of TNE programmes both physically and virtually.

Nigeria also benefits from the UK's Commonwealth Scholarship and Fellowship Plan, funded by the Foreign, Commonwealth and Development Office. Each year, around 800 students are offered the scholarship which allows them to study a fully funded postgraduate degree at one of the UK's HEIs.³⁵

In addition, the Going Global Partnerships – Innovation for African Universities programme, launched in 2021, aims to increase educational collaboration between the UK and Sub-Saharan African universities. Under the initiative, three universities were chosen to act as 'centres for excellence', to help cultivate cross-institution partnerships in Kenya, Ghana, Nigeria and South Africa. Moreover, collaborations will focus on the exchange of knowledge in fields such as entrepreneurship and innovation to enhance the research capacity of higher education institutions, whilst accelerating technological development.³⁶

At the pre-tertiary level, the Nigerian Schools Foundation (NSF) is a bilateral UK-Nigeria association which aims to promote and maintain high quality educational and social standards at Nigerian secondary schools. Founded in 2012, the NSF have implemented several initiatives such as the NSF Excellence in Education Development scheme which provides expert training, coaching and resources to Nigerian secondary schools. Presently, there are over 40 schools involved, benefitting from the additional teacher training, strategic planning and resources provided by the programme.³⁷

Further, the Connecting Classrooms through Global Learning Programme is an ongoing project established in 2010 between the British Council, the UK's Foreign, Commonwealth and Development Office and the Nigerian government which aims to increase cooperation between UK and Nigeria junior and secondary schools. The two main aims of the project are to enhance the international components of school curricula through strengthening bilateral school-level

³⁴ Nigeria Gets £600,000 UK Grant for 20 Institutions, *allAfrica*, 2022, <https://allafrica.com/stories/202205180010.html>

³⁵ Commonwealth Scholarships, *British Council – Nigeria*, 2022, <https://www.britishcouncil.org/study-uk/commonwealth-alumni-membership/commonwealth-scholarships>

³⁶ Going Global Partnerships – Innovation for African Universities, *British Council*, 2021, <https://www.britishcouncil.org/programmes/education/higher-and-further-education/going-global-partnerships-innovation-african>

³⁷ Our Mission, *Nigerian Schools Foundation*, 2022, <https://www.nsf.community/>

relationships and to assist teachers' professional development by increasing training opportunities and increasing international cooperation. Since the Covid-19 pandemic, the programme has been limited to online collaborations, restricting face-to-face meetings. Nevertheless, the establishment of new partnerships between UK and Nigerian schools has continued.³⁸

In June 2021, the UK and Nigeria established the Innovative Teachers Fellowship programme in attempt to overcome the lack of digitally skilled teachers in the Nigerian education sector. The scheme was motivated by the Covid-19 pandemic, which highlighted the lack of digital fluency across Nigerian teachers, which was essential as educational institutions were forced online. The scheme was designed to increase teachers' digital competency by providing them with a six-week training programme. 261 teachers across six political zones received training and mentoring as a result of the scheme and were awarded certificates by the Tai Solarin University, Nigeria.³⁹

Another key institution underpinning educational relationships between the two countries is the Britain-Nigeria Educational Trust (BNET) which was founded in May 2007.⁴⁰ The Trust's key objectives are to increase access to education throughout Nigeria, improve the quality of education, support teacher training and development and provide educational institutions with the appropriate equipment and teaching facilities. To achieve this, the Trust promotes partnerships with UK institutions and initiates education projects, funded by voluntary donations from individuals, organisations and annual subscriptions. One 2020 BNET project involved the establishment and financial support of the Agbado E-Learning Centre which is a weekend centre which offers primary school children in suburban Lagos the opportunity to develop their digital proficiency and ability to read and write.⁴¹ The Trust also co-sponsor two visiting Commonwealth research fellows to the Ahmadu Bello University, Zaria and Bayero University in Kano. The aim of the sponsorship is to develop course curriculums, enhance the quality of teaching and improve the way in which students are examined.

³⁸ Connecting Classrooms, *British Council*, 2022, <https://www.britishcouncil.org/programmes/education/schools-projects/connecting-classrooms>

³⁹ UK-Nigeria Tech Hub Innovative Teachers Fellowship, *Department for Digital, Culture, Media and Sport*, 2021, <https://www.gov.uk/government/case-studies/uk-nigeria-tech-hub-innovative-teachers-fellowship>

⁴⁰ Britain-Nigeria Educational Trust, 2022, <https://britain-nigeria.org/>

⁴¹ BNET Projects Update, *Britain-Nigeria Educational Trust*, 2022, <https://britain-nigeria.org/bnet-projects-update-february-2020/>