NITDA
National Information Technology Development Agency

CLOUDFIRST.GOV.NG

2025

NATIONAL CLOUD INVESTMENT STRATEGY

SIZE THE OPPORTUNITY, SIGNAL THE SUPPORT START THE CONVERSATION

This document presents an overview of the market opportunity for cloud computing services in Nigeria across different economic sectors, and also presents strategies that the government is using to facilitate investment in the cloud industry in Nigeria

NATIONAL SOVEREIGN CLOUD INITIATIVE

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BACKGROUND

As global cloud spending and data center investment accelerates, the contribution of the Digital Economy to Nigeria's GDP is set to continue rising

Nigeria's digital economy is a powerhouse of growth, growing at an estimated 13% CAGR and positioning the nation at the forefront of Africa's technological transformation. With a domestic cloud market projected to triple to US$3.28 billion by 2030, a historic opportunity exists to harness this momentum, attract a significant share of the US$7 trillion global data center market, and establish the country as the definitive digital hub for Sub Saharan Africa.

The Information and Communication Technology (ICT) sector has become a primary engine of economic diversification, contributing 14.19% of GDP in the first quarter of 2025. These trends underscore the critical role of digital infrastructure in driving economic growth, enhancing public sector efficiency, and fostering innovation.

There is a huge shift towards digitalization of government services even as the gains of democracy are more entrenched and citizens and government desire more responsive services and support.

The National Cloud Computing Strategy being updated in 2025 and other initiatives such as the National Sovereign Cloud Initiative set a new tone for government participation in the digital market. By enforcing a "Cloud First" mandate for all Federal Public Institutions (FPIs), the government will act as an anchor tenant and market-maker. This will not only drive down IT costs by an estimated 30-40% but will also establish a framework for collaborative funding arrangements across critical agencies, investing in digital public infrastructure and shared services, and aggregating public sector demand.

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"Availability of clear policies and guidelines, signals a stable and predictable regulatory environment, which is essential for long-term investment "

A Consistent Strategy for Digital Transformation

Nigeria's drive to attract investment in data centers and hyperscalers is not a recent development but rather the culmination of a deliberate and consistent multi-year strategy to build a resilient and sovereign digital economy. Successive government initiatives have progressively laid the groundwork, demonstrating a sustained commitment to digital-led growth. This investment strategy is the next logical step in an evolution, not a revolution, building upon established policies, legal frameworks, and actionable roadmaps.

Foundational Policies and Strategies

- National Information Technology Policy (2001)
- Nigerian Government Enterprise Architecture (NGEA) (2019)
- Nigeria Data Protection Regulation (NDPR) (2019)
- National Digital Economy Policy and Strategy 2020 - 2030 (NDEPS) (2019)
- Nigeria Cloud Computing Policy (2019)
- Nigeria Data Protection Act (NDPA) (2023)
- National Artificial Intelligence Strategy (NAIS) (2024)

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The cornerstone of this journey was the 2019 Nigeria Cloud Computing Policy, which formally introduced the "Cloud First" principle. This directive mandated that Federal Public Institutions (FPIs) prioritize cloud-based solutions for IT procurement, aiming to reduce capital costs, enhance service delivery, and drive efficiency. This policy was intrinsically linked to broader national goals, such as the Economic Recovery and Growth Plan (ERGP), which identified ICT as a primary enabler for economic development. This remains consistent with the current administration's **Renewed Hope Agenda**, which prioritizes digital transformation and infrastructure modernization as key drivers for economic diversification and job creation.

The National Digital Economy Policy and Strategy (2020–2030), a comprehensive blueprint designed to transform Nigeria into a leading digital economy, which remains in effect solidified the government's vision and provided an overarching framework for subsequent initiatives, emphasizing the critical role of digital infrastructure in achieving national development objectives.

Actionable Roadmaps and Implementation

NITDA has translated these high-level policies into actionable plans through its Strategic Roadmap and Action Plan (SRAP).

The initial plan, SRAP 1.0 (2021 - 2024), demonstrated tangible success by achieving 41 out of 64 initiatives. Its impact was felt across several key areas, including:

- **Developmental regulations**
- **Support for digital innovation and entrepreneurship**
- **Advancements in digital literacy and skills**
- **Digital transformation in critical sectors like Agriculture, Education, and Public Institutions**

The current NITDA Strategic Roadmap and Action Plan 2.0 (2024–2027) continues this momentum, explicitly supporting the implementation of the national cloud policy and the development of digital public infrastructure.

NITDA continues to build its institutional capacity to support the technology industry and drive strategic programs for both public and private sector stakeholders.

Further, the execution of NITDA's strategic plans for the sector is operationalized through Digital Transformation Technical Working Groups (DT-TWGs), which are chaired by the Head of IT in each Ministry, Department, and Agency (MDA). This structure ensures that the digital transformation agenda is driven from within the government, fostering ownership and effective implementation at the institutional level.

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Legal and Regulatory Bedrock

A significant milestone in this journey towards a thriving Digital Economy was the enactment of the Nigeria Data Protection Act (NDPA) 2023. This landmark legislation, complemented by its General Application and Implementation Directive (GAID), establishes a robust legal framework for data protection and privacy.

The NDPA provides the legal certainty required to enforce data sovereignty, govern cross-border data flows, and build trust among citizens, businesses, and international partners, making it a critical enabler for investment in local data hosting.

Building directly on this legal foundation, the National Cloud Policy 2025 (NCP2025) represents a significant evolution of the earlier 2019 cloud policy. Where the first policy established the "Cloud First" principle, the NCP2025 provides the critical architecture for implementation at scale. It introduces a comprehensive National Cloud Technical Document with detailed implementation guidelines for Federal Public Institutions (FPIs) and service providers. Furthermore, it institutes SovGov, Nigeria's sovereign cloud governance committee, to ensure robust oversight and compliance. A central pillar of this new policy is the launch of the Digital Marketplace.

www.cloudfirst.gov.ng is a dedicated portal designed to streamline procurement, ensure transparency, and promote the adoption of certified cloud solutions across government.

Together, this consistent progression of policy, law, and strategy demonstrates Nigeria's unwavering commitment to creating a sophisticated, secure, and investment-friendly digital ecosystem.

The National Cloud Investment Strategy is therefore a direct and intentional continuation of this long-standing national vision.

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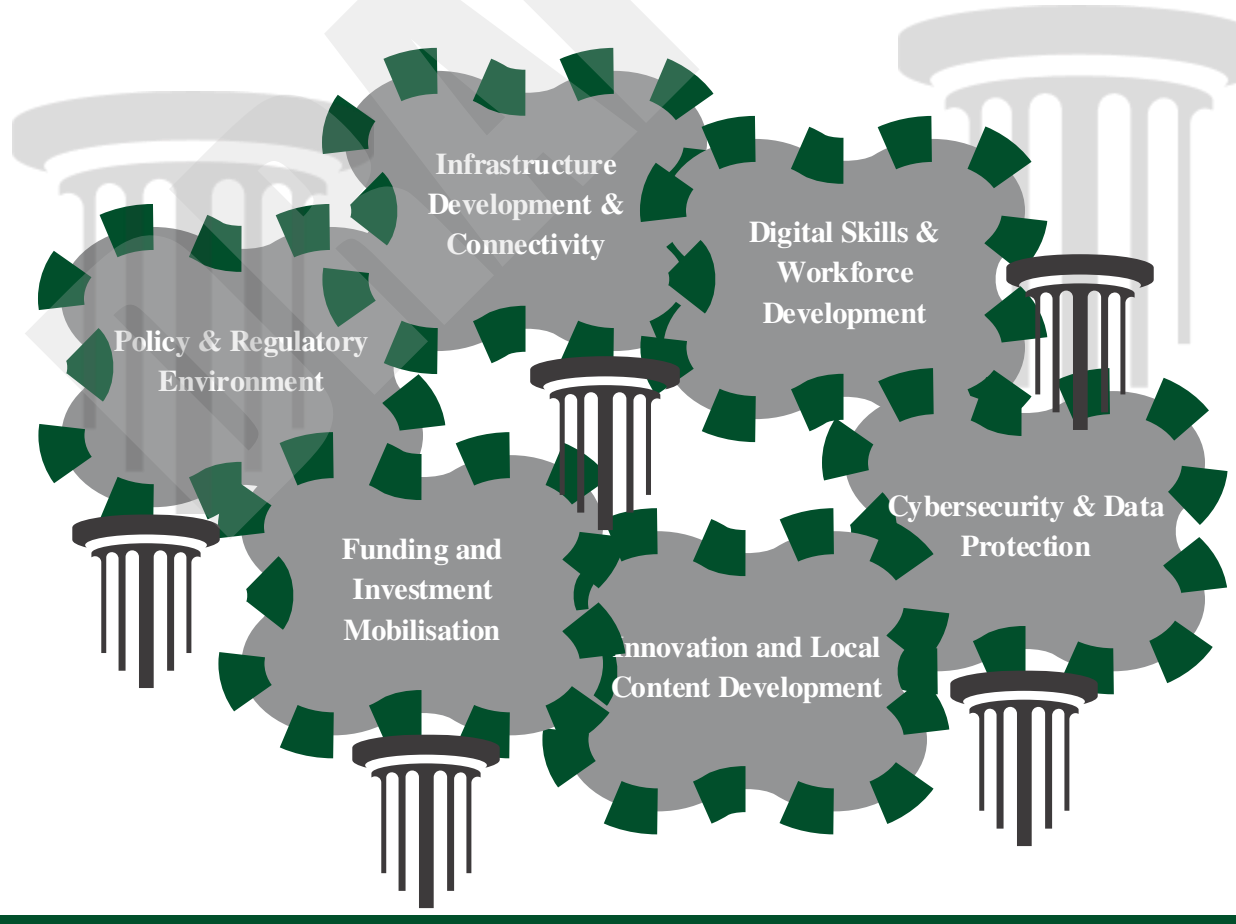
PILLARS OF THIS STRATEGY

This strategy is developed fully aware of the challenges that new and existing investors in the country may already be considering as risk factors with a view to de-risk investments.



Policy & Regulatory Environment

A modern, predictable, and pro-investment policy and regulatory environment establishing a local landscape built on trust, regulatory clarity, and stability.

- To build global confidence in Nigeria's governance structures.
- To accelerate public sector transformation.
- To stimulate the growth of a resilient local cloud industry; and
- To present a unified, predictable regulatory front to international investors.

Infrastructure Development & Connectivity

World-class digital infrastructure including fibre optic networks, data centre infrastructure, energy solutions and Internet Exchange Points (IXPs) that ensure data flows quickly and affordably within our borders.

- To achieve widespread national fibre connectivity.
- To promote the development globally competitive data centre market within Nigerian borders.
- To solve the energy deficit.
- To enhance the efficiency of the national internet ecosystem by maximising local traffic exchange.

Digital Skills & Workforce Development

Leverage the young population to groom a skilled workforce to design, operate, and innovate by building a robust pipeline of talent across education, industry, and government, and a culture of curious amd continuous learning for global competitiveness.

- To produce a generation of tech-savvy, globally competitive graduates by embedding cloud and digital skills into the national educational curriculum.
- To create an ecosystem where universities reliably produce job-ready talent for the tech industry.
- To leverage targeted training initiatives and partnerships to build a digitally skilled civil service that can confidently adopt and manage cloud services for national benefit

Cybersecurity & Data Protection

Ensure resilience of Nigeria's digital ecosystem, protection of citizens' rights and trust in the integrity of the nation's critical government and economic functions within the cloud

- To establish a national cybersecurity capability that inspires trust and ensures resilience against large-scale cyberattacks.
- To develop clear cloud security and compliance standards.
- To build a trusted ecosystem where the government and private industry can be responsive to address cybersecurity threats.

Innovation and Local Content Development

Repositioning Nigeria as a net producer of innovation, eliminating the dominance of a consumption-dominant model to becoming owners of our digital future via a vibrant ecosystem where Nigerian innovators leverage the cloud to solve problems and compete on a global scale.

- To create and sustain world-class innovation hubs that enable Nigerian startups to build, scale, and export cloud-based solutions.
- To foster the local capacity to justify a "Nigeria first" culture for the procurement of cloud-based services.
- To develop national research capacity that leverages the cloud to drive innovation.

Funding and Investment Mobilisation

To mobilise resources from government, private investors, development partners and users that can sustain a growing local IT ecosystem, leveraging innovative financing and support models to de-risk new investments and boost investor and market confidence.

- To ensure consistent government budgetary commitments to skills programs and cloud infrastructure under new expenditure models.
- To position Nigeria as a preferred destination for global cloud investment by attracting foreign direct investment (FDI).
- To establish national mechanisms that leverage both public and private capital to fund major investments in the local cloud industry

WHY NIGERIA NEEDS THIS

Investment in cloud computing infrastructure and services is an essential enabler and multiplier for Digital Transformation and Economic Development. The nation needs serious partners and that means cloud localization.

Driving Public Sector Efficiency and Service Delivery

Cloud computing offers Nigeria the opportunity to modernise public administration by reducing fragmentation across ministries and agencies. Cloud-based platforms enable centralised tax systems, procurement, and identity management, improving transparency and interoperability. Cloud-backed e-governance can cut administrative costs by up to 30% while enhancing citizen satisfaction. For Nigeria, this would mean more efficient service delivery and data-driven policymaking.

Supporting the Growth of the Digital Economy

Nigeria's digital economy depends heavily on scalable cloud infrastructure. Sectors such as fintech, e-commerce, and health tech use cloud services to process transactions securely, scale operations, and reach wider markets. Nigeria's fintech sector alone attracted US$1.2 billion in investment between 2021 and 2023, underscoring the cloud's role as a growth enabler.

> "At the heart of everything we do is co-designing and co-creation... but without operational sovereignty, we cannot fully control or secure our digital assets"
>
> — Director General
> **NITDA**

Enabling Startups and Innovation
With over 500 active tech hubs, Nigeria hosts one of Africa's most vibrant startup ecosystems. Cloud services lower entry barriers by providing affordable, on-demand computing power, allowing entrepreneurs to focus on product development rather than infrastructure. This democratizes innovation and supports Nigeria's ambition of becoming a global tech player.

Boosting Productivity and Job Creation
Cloud adoption drives productivity gains across sectors such as agriculture and manufacturing, with SMEs reporting efficiency improvements of up to 25%. At the same time, the expansion of cloud services creates new jobs in fields like cloud engineering, cybersecurity, and data science, directly supporting Nigeria's young workforce.

Enhancing Data Security and Digital Sovereignty
A national cloud strategy strengthens digital sovereignty by ensuring sensitive government and citizen data is hosted locally, reducing reliance on foreign servers. Cybersecurity-enabled cloud solutions can also mitigate the rising cost of cyberattacks, currently estimated at ₦5.5 billion annually, while boosting investor confidence in Nigeria's digital economy.

Enabling Regional Competitiveness
Nigeria is well-positioned to become a regional hub for cloud services under the African Continental Free Trade Area (AfCFTA). The domestic market is expected to grow from US$1.03 billion in 2025 to US$3.28 billion by 2030, contributing to Africa's projected US$18 billion cloud market. Strategic investment would allow Nigeria to consolidate its position as Sub Saharan Africa's digital leader.

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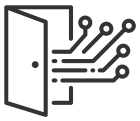
WHY NIGERIA IS READY FOR THIS

The Nigeria market is on the brink of hyperscale growth. The discerning observer can see the building blocks for a vibrant digital economy being laid, brick by brick.

A Government in Digital Transformation

Africa's Undisputed FinTech Powerhouse



Gateway to 1 billion Sub Saharan Africans

Insatiable appetite for data connectivity

AI Ready Population

A nation of sophisticated digital natives

Nigeria stands at a pivotal moment, presenting the most compelling case for hyperscale data center investment on the continent. This readiness is not based on future promises but on the powerful convergence of present-day realities. A massive, young, and digitally sophisticated population of over 160 million internet users has an insatiable appetite for data, driving exponential growth in local traffic and demanding faster, more reliable digital experiences.

This demand is supercharged by a world-class private sector, anchored by an undisputed fintech powerhouse that attracts billions in global venture capital and processes hundreds of billions of dollars in digital transactions. Simultaneously, Nigeria's government is undergoing a sweeping digital transformation, building on a foundation of over 100 million digital identities to modernize public services, which requires secure, sovereign data infrastructure.

Positioned as the economic anchor of West Africa and a key leader in the African Continental Free Trade Area (AfCFTA), Nigeria is the natural digital hub for a connected continent. As the nation proactively embraces the AI revolution, the need for powerful, low-latency local computing has become a strategic imperative. For investors, the signal is clear: Nigeria is a market where explosive domestic demand, government-led modernization, and continental leadership have created an unprecedented and urgent opportunity for hyperscale infrastructure investment.

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A Government in Digital Transformation

Massive Digital Identity Base: The National Identity Number (NIN) program has enrolled over 121 million Nigerians, creating one of the largest digital identity databases in Africa that requires robust, local data management.

121 million IDs

Unified Digital Payments: The Treasury Single Account (TSA) has processed over ₦70 trillion (approx. $47 billion) since its inception, proving the government's capacity to manage large-scale digital financial systems.

$47 billion

Africa's Undisputed FinTech Powerhouse

Dominant Investment Hub: Nigerian startups, overwhelmingly led by fintech, attracted over $1.2 billion in venture capital in 2022, consistently ranking among the top destinations in Africa for tech investment.

$1.2 billion

Explosive Digital Payments: The value of digital payment transactions in Nigeria is projected to reach $438 billion by 2025, with the number of digital payment users expected to exceed 149 million.

$438 billion

Gateway to 1 billion Sub Saharan Africans

Economic Anchor of West Africa: Nigeria's GDP of over $477 billion represents more than 70% of the entire ECOWAS region's economy, making it the center of gravity for regional trade and data flows.

70% of region

Gateway to a Billion Consumers: The AfCFTA is projected to boost Africa's income by $450 billion by 2035, with Nigeria positioned as a primary beneficiary and the natural data gateway for businesses entering this massive integrated market.

$450+ billion

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Insatiable appetite for data connectivity

Massive Connectivity: Nigeria has over 160 million active internet users, the largest connected population on the continent. This grows at between 2-5% annually alongside higher average usage lvels.

160 million

Exploding Data Traffic: Data traffic at the Internet Exchange Point of Nigeria (IXPN) has seen exponential growth, peaking at over 500 Gigabits per second (Gbps) in 2024, a clear indicator that keeping traffic local is a top priority.

500 Gigabits/s

AI Ready Population

Proactive National Strategy: Nigeria is one of the first African nations to develop a comprehensive National AI Strategy, aiming to create a local AI market worth over $460 million by 2026.

$0.5 billion

Growing AI Ecosystem: The country is home to over 120 AI-focused startups and research groups, building solutions for local challenges and creating a demand pool for high-performance computing.

120+ startups

A nation of sophisticated mobile-first digital natives

Social Media Dominance: Nigeria is home to over 45 million active social media users, with one of the highest engagement rates globally on platforms like Instagram, X, and TikTok.

45 million AUs

E-commerce Boom: The Nigerian e-commerce market is projected to reach over $15 billion in revenue by 2025, driven by a massive, mobile-first consumer base demanding fast and reliable online shopping experiences.

$15 billion

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THE MARKET FOR CLOUD SERVICES

The Nigerian Market for Cloud Services is shaped by private sector demand and public sector requirements especially turnkey service delivery transformations on the horizon

&

*The demand for cloud services in Nigeria is a tale of **two powerful engines**. The first is a dynamic, high-growth private sector, led by a world-class fintech ecosystem and a burgeoning class of Small and Medium Enterprises (SMEs) that see cloud adoption as a direct path to efficiency and scale. The second is a vast public sector, which is on the cusp of a major transformation. As both federal and state governments move to consolidate IT spending and modernize service delivery, they are set to become the largest single consumer of cloud infrastructure, creating a massive, stable, and long-term market for investors.*

> "Nigeria is really the best place to invest, it is one of the places to make money all over the world. It is the best kept secret actually in terms of investment"
>
> — *Aliko Dangote*

Public Sector: Primed for Consolidation

Nigeria's public sector represents a significant, yet historically fragmented, market for cloud adoption.

Federal Government Spending

At the federal level alone, annual IT spending on new projects is estimated to be between $150–$180 million*. This includes major investments in digitizing government services, upgrading legacy data centers, and supporting foundational systems like the National Identity Number (NIN).

However, this spending is often siloed within individual ministries and agencies, leading to duplication and inefficiency. Further, the choice of infrastructure for new and existing projects was hitherto not standardized, leaving every institution to decide based on their current capabilities (often defaulting to on-premise).

State Government Spending

At the state level, fragmentation between ministries, departments and agencies is also common with large YoY variability. States spent around $40-$50 million* on new IT projects between 2023 and 2024.

* Both estimates do not include IT spending embedded in other projects.

Federal Level
~ 900 Agencies, ~25 Ministries
$180 million annual spend

State Level
36 + 1 with ~ 55 MDAs each
$50 million annual spend

LGA Level
774 with ~ 10 depts each
annual spend unknown

- Lagos State, in its 2024 budget, allocated over ₦2.89 billion for its Smart City Project and ₦653 million for a new data center, signaling a clear commitment to modern digital infrastructure.
- Kaduna State has centralized its IT spending with a dedicated directorate, allocating ₦1.79 billion in 2024 for technology initiatives, a significant portion of which is directed towards cloud-hosted platforms.
- Edo State continues to drive its e-governance agenda, investing in digital ID, land administration systems, and citizen service portals that increasingly rely on managed cloud services.

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As Nigeria's private sector harnesses the power of its innovators and researchers, it becomes not just a driver of profit, but a force for transformation—reshaping agriculture, healthcare, and technology into engines of prosperity. It is a clear multiplier effect.

Private Sector: Poised for Hyperscale

The private sector, particularly the SME segment, is the engine of Nigeria's economic growth, and cloud technology can become its fuel.

Low Levels of Digitalization, Promising Cloud Penetration but low localization rates

Nigeria's private sector presents a compelling dual opportunity for investors, defined by a sharp contrast between highly digitized industries (media & entertainment, banking, financial services & insurance (BSFI), Fintech and e-commerce) and a vast, underserved foundational economy (MSMEs, manufacturing, healthcare, education, etc). This dynamic creates a market with both proven, existing demand hosted in non-localized clouds and enormous future growth potential from the innovations of the future that will be cloud-native. This presents a ground-floor opportunity to enable and grow with some of the largest segments of the Nigerian economy.

Increasing Sophistication of Service Offerings

There is an increasing demand for data-heavy applications which has profound implications for infrastructure. Advanced analytics, and the future adoption of Artificial Intelligence (AI) and Machine Learning (ML) services, are computationally intensive and require significant data processing power. Performing these tasks at operational scale on large datasets over high-latency international links is often inefficient, slow, and cost-prohibitive.

Potential Mid-Sized Corporate Cloud Accounts

~1.4 million businesses*, or 20% of registered businesses in the country.

Estimated Cloud Market at Peak Digitalization

9.8 Exabytes annually^

Estimated Local Datacenter Capacity Needed at Peak

980 - 1,960 MW (3.9% of global DC capacity) consuming ~2.94 million MWh of power annually

* Does not include sole proprietor SMEs (classified as Other End users), which number 40 million in 2020 (SMEDAN). There are 7 million registered businesses in Nigeria in 2024 (CAC)

^ Estimated total data need for a sector is the sum of estimated annual institutional customer storage need, estimated annual institution other storage need and estimated annual transactional data need. A multiplier, which stands for the intermediate processing and storage utilized to process each unit of customer data, is used to go from estimated average customer daily transaction data in each sector to total transactional data need in each sector. E.g. a multiplier of 17 is applied to BFSI sector. An adjusted multiplier (1/3 of transaction multiplier) is used to estimate the additional storage need for each unit of customer data held by a company, and other institutional data.

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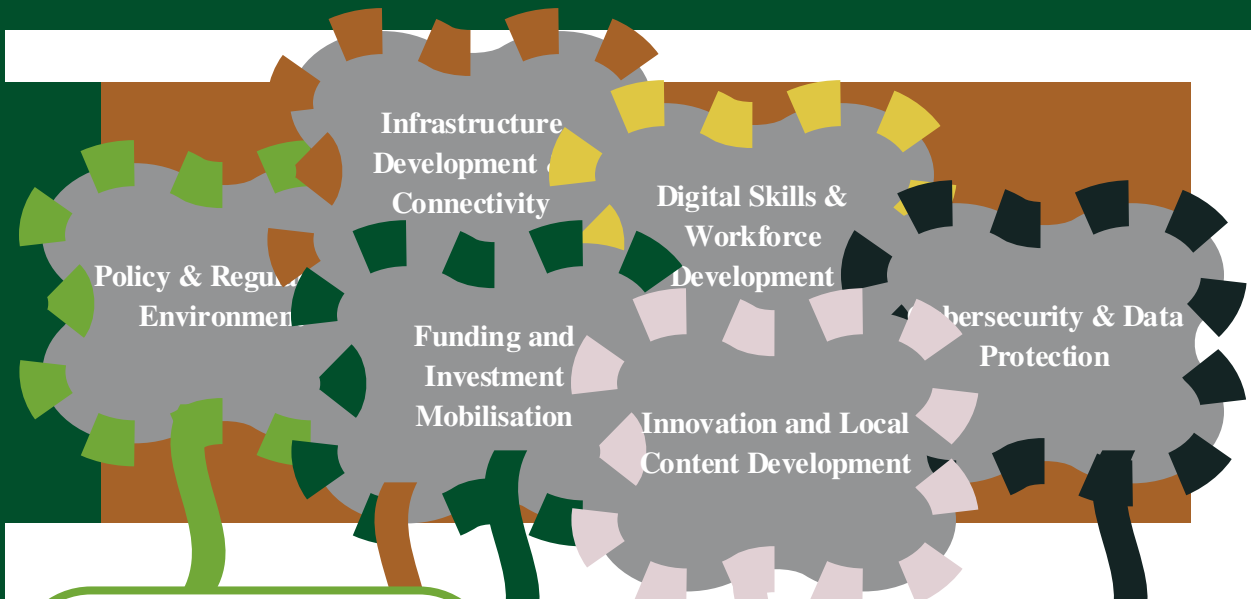
NATIONAL INVESTMENT IN CLOUD

Leveraging past successes in Telecoms and other industries, the Nigerian government is actively supporting existing and emerging investments in cloud while assembling the resources required to develop this sector.

Drawing lessons from the successful deregulation of the telecommunications sector, which unlocked unprecedented private investment and digital growth, the Nigerian government is keen on implementing a similar, private sector-led playbook for cloud infrastructure.

The strategy is not for the government to build and operate data centers, but to act as a strategic enabler—de-risking investment, providing powerful incentives, and creating a clear path for private capital to build the nation's digital backbone.



Investing in collaborative policy development (e.g. TWGs)

Development of clear implementation guidelines

Incentives for local cloud providers and foreign providers who plan to make significant investments

Establish a robust national cybersecurity capability

Develop clear cloud security and compliance practice standards around shared responsibility

Establish and enforce a transparent program for continuous compliance and audit

Ongoing projects to increase national fibre infrastructure & last mile access + New SPVs

Attract new investments in data centers within the country through PPP arrangements

Facilitate and incentivize power purchase agreements and hybrid power infrastructure

Co-invest in world-class hubs that enable startups to build, scale, and export cloud-native solutions

Foster a "Nigeria first" culture for procurement of cloud services

Develop research capacity that leverages the cloud to drive innovation in key sectors

Ensure both routine and new strategic budgetary commitments to cloud infrastructure within FPIs

Partner with foreign partners to position Nigeria as a preferred destination for global cloud investment

Unlock strategic capital for the local cloud ecosystem including Technology Development Zones

Public sector training initiatives on vendor-agnostic cloud computing principles and practices

Industry-Academia partnerships around cloud first development

Leverage new curriculum updates to embed foundational cloud skills from primary to tertiary

The responsibility for driving these strategic initiatives will be placed with SovGov, the National Sovereign Cloud Governance Committee in partnership with key stakeholders

WHAT SUCCESS LOOKS LIKE

A thriving Digital Marketplace, seamless listing for Cloud Service Providers and Systems Integrators, a one-stop shop for buyers from the government at all levels, a blueprint that the private sector adopts, and more

Economic Impact
Success is measured by the total procurement value flowing through the marketplace annually, demonstrating its role as a primary economic channel.

SME Empowerment
Success is the percentage of contracts (by value and volume) awarded to indigenous Nigerian providers or foreign CSPs with provisional indigenous status. A successful marketplace actively fosters local industry growth and local investment.

Market Diversity
Success is a continuous year-over-year growth in the number of certified providers and listed services. This indicates a healthy, competitive ecosystem that prevents vendor lock-in and drives innovation.

De Facto Industry Standard
Success is when private sector organizations, especially in regulated industries like finance and healthcare, begin to voluntarily adopt the government's cloud security and procurement standards.

(These metrics will be tracked by SovGov and reported on cloudfirst.gov.ng Digital Marketplace)

Seamless and Transparent
Success is a seamless and transparent certification process based on the National Cloud Computing Policy 2025.

Predictable Timelines
The certification process is successful when it has a published, predictable timeline and cost, allowing providers to plan and execute their entry into the government market effectively.

Cross-Government Adoption
Success is measured by the adoption rate of the marketplace across all tiers of government for their primary cloud procurements.

Measurable Efficiency Gains
Success is demonstrated through hard data on reduced procurement cycle times and quantifiable cost savings achieved through aggregated purchasing and the elimination of duplicative systems.

Economic Accelerator
The "Certified for Nigerian Government" status becomes a powerful market differentiator, boosting the commercial viability of local CSPs and SIs in the private sector market.

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CONCLUSION

Nigeria is poised not to be a bystander in the ongoing AI and Data Centre revolution leading to record levels of investment. As citizens and government digitalize their systems, investment in localized platforms are an imperative.

Nigeria is not merely participating in the global digital age; it is poised to become a formidable and sovereign leader within it. The convergence of a massive, young, and tech-savvy population, a world-class innovative private sector, and a strategic geographic position has created an unprecedented market opportunity. The question is no longer if Nigeria's digital economy will grow, but **who will build the foundational infrastructure to power it.**

This document has articulated a deliberate, clear, and multi-faceted strategy to answer that question. The Government of Nigeria, through the National Cloud Policy 2025 and its related initiatives, is acting as a strategic enabler. Our approach is designed to de-risk investment and catalyze growth by establishing a predictable policy environment, mobilizing public and private capital, fostering a skilled local workforce, and ensuring the development of world-class connectivity and energy infrastructure.

The vision is a resilient, self-reliant digital economy where Nigerian data powers Nigerian innovation securely and efficiently. The foundations are laid, the strategy is clear, and the commitment is unwavering. We invite our partners—local champions and global leaders—to join us in building this future. The time to invest in Nigeria's digital sovereignty is now.

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Prepared on behalf of the
Sovereign Cloud Governance Committee [SovGov]

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