



National Cloud Investment Strategy

Size the Opportunity, Signal the Support,
Start the Conversation

August 2026

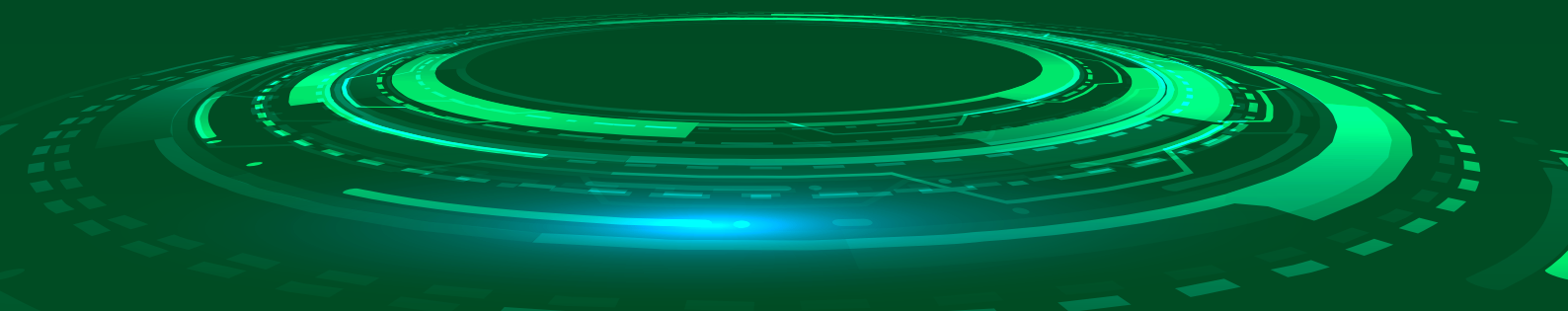




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CHAPTER I

Executive Overview

The opportunity, national vision and strategic objectives





Executive Summary

Nigeria stands at a defining moment in the evolution of its digital economy. As cloud computing, artificial intelligence, digital public infrastructure, and data-driven services reshape economies worldwide, the demand for secure, resilient, and locally available digital infrastructure continues to grow. This National Cloud Investment Strategy sets out Nigeria's roadmap to harness this opportunity by positioning the country as the preferred destination for cloud infrastructure, hyperscale data centres, sovereign compute, and digital infrastructure investment in West Africa.

Nigeria's cloud computing services market is projected to nearly triple within five years, growing from an estimated US\$1.03 billion in 2025 to US\$3.28 billion by 2030 (Mordor Intelligence January 2025). This growth is underpinned by one of Africa's largest and most dynamic digital markets, a rapidly expanding fintech and technology ecosystem, increasing digital public service delivery, rising enterprise cloud adoption, and a youthful, digitally connected population. Government intends to reinforce this demand by progressively implementing Cloud First requirements across Federal Public Institutions, aggregating eligible public-sector demand, and enabling certified providers to participate through the Digital Regulatory Platform.

US\$1.03bn Estimated market, 2025	US\$3.28bn Projected market, 2030	~26% Indicative CAGR
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Nigeria has established one of Africa's most comprehensive regulatory and institutional foundations for cloud adoption through the National Sovereign Cloud Initiative (NSCI). As part of the Initiative, Government has developed a suite of complementary regulatory, governance, and assurance instruments, including the National Cloud Guideline 2026 (NCG 2026), the National Cloud Technical Guideline, the National Digital Infrastructure Assurance Framework (NDIAF), this National Cloud Investment Strategy, and other supporting frameworks to operationalise the Initiative's objectives. Collectively, these instruments provide investors with regulatory certainty, clear governance arrangements, defined institutional responsibilities, and a structured Approval in Principle (AIP) pathway for cloud investment.

This Strategy is built around six mutually reinforcing pillars: a predictable policy and regulatory environment; investment mobilisation and financing; world-class digital infrastructure and connectivity; digital skills and workforce development; innovation and local content development; and cybersecurity and data protection. Together, these pillars provide the strategic foundation for developing a competitive, secure, and sustainable cloud ecosystem capable of supporting both national priorities and regional digital transformation.

Beyond meeting Nigeria's domestic requirements, this Strategy positions the country to become a regional cloud and digital infrastructure hub serving West Africa and the broader African Continental Free Trade Area (AfCFTA). By combining market scale, regulatory certainty, strategic geography, and Government commitment, Nigeria offers investors a unique opportunity to participate in building the digital infrastructure that will power Africa's next phase of economic growth.



Investors, cloud service providers, infrastructure developers, technology companies, financial institutions, and development partners are invited to engage with Government through the structured investment pathway established under this Strategy. Together, Government and industry can build the trusted digital infrastructure that will underpin Nigeria's digital future and serve as the foundation for regional digital growth.

NATIONAL VISION

Vision Statement

VISION

To establish Nigeria as Africa's premier hub for sovereign cloud, hyperscale digital infrastructure, and trusted data services, powering national transformation, regional digital integration, and a globally competitive digital economy through secure, resilient, and sustainable cloud infrastructure.

SECTION 1

Strategic Objectives

This Strategy pursues seven strategic objectives, each of which is developed in detail in the sections that follow:

- 01** | Attract hyperscale and strategic cloud infrastructure investment into Nigeria, including data centres, sovereign compute capacity, and related digital services.
- 02** | Strengthen sovereign cloud capacity for government and regulated sectors, consistent with the National Sovereign Cloud Initiative and the National Digital Infrastructure Assurance Framework (NDIAF).
- 03** | Establish Government as the anchor customer for the domestic cloud market, through Cloud First implementation, compliance monitoring, and demand aggregation
- 04** | Promote indigenous participation and local content across the cloud value chain, including certified indigenous cloud service providers and service integrators.
- 05** | Build a skilled cloud workforce across government, academia, and industry, closing the gap between the talent Nigeria produces and the talent the cloud economy requires.



- 06 | Provide a predictable, transparent regulatory and investment pathway, so that investors can plan around clear rules, defined timelines, and named institutional counterparts.
- 07 | Position Nigeria as a regional cloud and data-centre hub under AfCFTA, converting scale and market leadership into cross-border digital trade advantage.

1.1 Why This Strategy Matters

Nigeria's digital economy has reached an important inflection point. Over the past two decades, Government has progressively established the legal, policy, and institutional foundations necessary to support cloud computing, digital infrastructure, data protection, and digital public services. The National Sovereign Cloud Initiative (NSCI) consolidates these efforts into a coordinated national programme that provides regulatory certainty, promotes digital sovereignty, and strengthens Nigeria's digital infrastructure.

While these regulatory instruments establish the governance framework for cloud adoption, investors require a complementary strategy that clearly articulates the commercial opportunity, Government's long-term commitment, institutional arrangements, and investment pathways. This National Cloud Investment Strategy fulfils that role.

The Strategy complements the National Cloud Computing Guideline 2026, the National Cloud Technical Guideline, the National Digital Infrastructure Assurance Framework (NDIAF), by translating regulatory certainty into investment confidence. It provides investors, development partners, financial institutions, and technology providers with a coherent understanding of Nigeria's cloud ambitions, implementation priorities, and collaborative approach to market development.

Ultimately, this Strategy seeks to bridge the gap between policy and investment by demonstrating that Nigeria is not only regulating cloud computing but actively creating an enabling environment for long-term investment, innovation, and sustainable digital economic growth.



CHAPTER II

Foundations & Policy

The policy, legal and strategic groundwork
for this Strategy





SECTION 2

Background

As global cloud spending and data-centre investment accelerate, the digital economy's contribution to Nigeria's GDP is set to continue rising, reflecting a broader continental and global shift toward Cloud First digital infrastructure.

Nigeria's digital economy is a driver of national growth, and a historic opportunity exists to harness this momentum. Nigeria's domestic cloud computing market is projected to nearly triple, from , a compound annual growth rate of roughly 26% (Mordor Intelligence Report January 2025).

The Information and Communication Technology (ICT) sector has become a primary engine of economic diversification, contributing (11.18% of real GDP Q2 2025), according to National Bureau of Statistics data. These trends underscore the critical role of digital infrastructure in driving economic growth, enhancing public sector efficiency, and fostering innovation.

Public and Private sectors institutions are increasingly adopting digital platforms to improve service accessibility, operational efficiency, transparency, and responsiveness to citizens and businesses. This transition is driving demand for secure, scalable, and interoperable cloud infrastructure capable of supporting public services at national scale.

The National Sovereign Cloud Initiative (NSCI) is Nigeria's foundational programme for sovereign cloud adoption. It will be operationalised through a structured suite of instruments the National Cloud Computing Guideline 2026, its accompanying National Cloud Technical Guideline, and the National Digital Infrastructure Assurance Framework (NDIAF), which together define the guideline, technical, and assurance requirements for cloud adoption in Nigeria. This Strategy is the investment-facing companion document that translates the regulatory foundation into a clear proposition for capital. Through the progressive implementation of the Cloud First mandate across Federal Public Institutions (FPIs), Government intends to act as an anchor customer and market catalyst by aggregating eligible public-sector demand, promoting shared digital infrastructure, and enabling certified providers to participate through the Digital Regulatory Platform.

2.1 Cloud Infrastructure as National Strategic Infrastructure

Cloud infrastructure has evolved beyond a conventional information technology service to become a foundational component of modern economies. It provides the digital infrastructure upon which governments deliver public services, businesses innovate and compete, financial systems operate securely, and emerging technologies such as artificial intelligence, big data analytics, the Internet of Things (IoT), and digital public infrastructure are developed and deployed. As economies become increasingly data-driven, access to trusted, resilient, and scalable cloud infrastructure has become a strategic national capability.



For Nigeria, cloud infrastructure is central to achieving the objectives of the Renewed Hope Agenda, accelerating digital transformation, enhancing public sector efficiency, strengthening national competitiveness, and supporting sustainable economic growth. It underpins the delivery of digital government services, financial technology, healthcare, education, agriculture, manufacturing, e-commerce, and other strategic sectors that are critical to the country's socio-economic development.

Cloud infrastructure also plays a vital role in strengthening national resilience. The ability to securely host critical government systems and strategic data, maintain continuity of essential public services, protect critical information infrastructure, and support rapid recovery from cyber incidents or physical disruptions is increasingly dependent on robust and resilient cloud capabilities. Equally important, the availability of high-quality digital infrastructure enhances investor confidence, attracts technology investment, enables innovation, and supports the development of indigenous digital capabilities.

Recognising this strategic importance, the Federal Government through the National Information Technology Development Agency (NITDA) established the National Sovereign Cloud Initiative (NSCI) as a national programme to accelerate the development of a secure, resilient, and globally competitive cloud ecosystem. Rather than focusing solely on technology adoption, the Initiative adopts a whole-of-government approach that integrates policy, regulation, investment, infrastructure development, digital skills, cybersecurity, and ecosystem development to strengthen Nigeria's digital economy and position the country as a preferred destination for cloud investment.

Accordingly, cloud infrastructure is recognised as strategic national digital infrastructure. Through coordinated implementation of the NSCI and its complementary regulatory, governance, and investment instruments, Government seeks to create an enabling environment that encourages private sector investment, promotes innovation, strengthens digital sovereignty, and positions Nigeria as the regional hub for cloud services, hyperscale data centres, artificial intelligence infrastructure, and trusted digital services serving West Africa and the broader African Continental Free Trade Area (AfCFTA).

STRATEGIC OUTCOMES

The recognition of cloud infrastructure as strategic national infrastructure is intended to:

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| 01 | Position Nigeria as the preferred regional destination for cloud infrastructure, hyperscale data centres, and digital infrastructure investment. |
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| 02 | Strengthen national digital sovereignty and the resilience of critical government and economic infrastructure. |
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| 03 | Enable trusted digital public infrastructure and accelerate the digital transformation of government and strategic sectors. |
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| 04 | Support the growth of artificial intelligence, fintech, digital trade, and other data-driven industries through secure, scalable computing infrastructure. |
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| 05 | Create high-value employment, stimulate indigenous innovation, attract foreign direct investment, and enhance Nigeria's competitiveness within the African Continental Free Trade Area (AfCFTA). |
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SECTION 3

A Consistent Strategy for Digital Transformation

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

Nigeria's drive to attract investment in data centres 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.

3.1 Foundational Policies and Strategies

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|----|---|
| 01 | National Information Technology Policy (2001) |
| 02 | Nigerian Government Enterprise Architecture (NGEA) (2019; NGEA v2.0 under revision) |
| 03 | Nigeria Data Protection Regulation (NDPR) (2019) |
| 04 | National Digital Economy Policy and Strategy 2020–2030 (NDEPS) |
| 05 | Nigeria Cloud Computing Policy (2019) |
| 06 | Nigeria Data Protection Act (NDPA) (2023) |
| 07 | National Artificial Intelligence Strategy (NAIS) (2024) |
| 08 | National Cloud Computing Guideline 2026 |

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) prioritise 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, and remains consistent with the current administration's Renewed Hope Agenda, which prioritises digital transformation and infrastructure modernisation as key drivers for economic diversification and job creation.

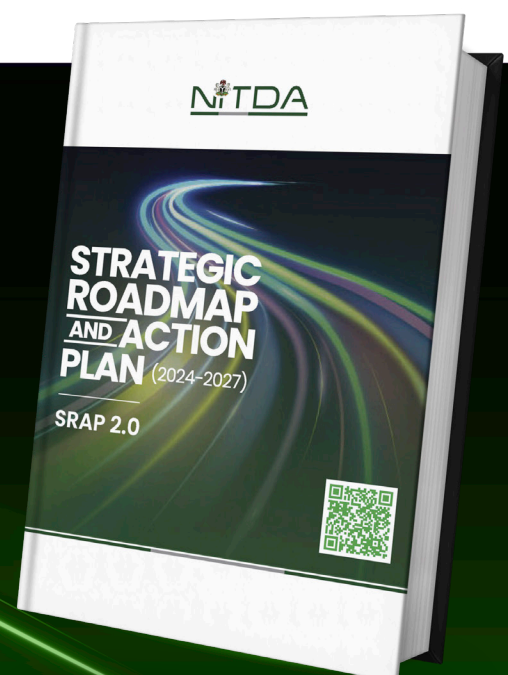
The National Digital Economy Policy and Strategy (2020–2030) established Nigeria's long-term vision for a digitally enabled economy and continues to provide the overarching national policy framework. The FMCIDE Strategic Blueprint: Accelerating our Collective Prosperity through Technical Efficiency (2023–2027) builds upon that foundation by translating national policy into an actionable implementation agenda focused on digital infrastructure, digital public infrastructure, innovation, emerging technologies, digital inclusion, and talent development under the Renewed Hope Agenda. The National Sovereign Cloud Initiative and this National Cloud Investment Strategy are strategic instruments developed within this broader policy continuum.

3.2 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 of 64 initiatives, with impact felt across developmental regulations, support for digital innovation and entrepreneurship, advancements in digital literacy and skills, and digital transformation in critical sectors including agriculture, education, and public institutions.

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

NITDA's strategic priorities are implemented through coordinated regulatory programmes, strategic partnerships, and inter-agency governance arrangements that bring together Federal Public Institutions, sector regulators, development partners, and the private sector. This collaborative implementation model ensures that national digital transformation initiatives are supported by sustained institutional coordination, clear governance structures, and effective execution, providing investors with confidence that Nigeria's cloud and digital infrastructure agenda is backed by long-term Government commitment.



SECTION 4

Legal and Regulatory Foundation

NITDA's mandate under the NITDA Act (2007) to plan, develop, and regulate Information Technology in Nigeria is the legal foundation for this Strategy and for the wider National Sovereign Cloud Initiative. That mandate covers policy formulation, standards-setting, and regulation of IT practice across public and private sectors, including cloud computing and data infrastructure.

Building directly on this legal foundation, the National Cloud Computing Guideline 2026 represents a significant evolution of the earlier 2019 cloud policy. Where the first policy established the “Cloud First” principle, National Cloud Computing Guideline provides the critical architecture for implementation at scale. It introduces a comprehensive National Cloud Technical Guideline with detailed implementation guidelines for Federal Public Institutions (FPIs) and service providers, and it institutes SovGov, Nigeria's sovereign cloud governance committee, to ensure robust oversight and compliance.

A central pillar of National Cloud Computing Guideline 2026 is the Digital Regulatory Platform which is a dedicated portal designed streamline procurement, ensure transparency, and promote the adoption of certified cloud solutions across Nigeria.

Together, this consistent progression of policy, law, and strategy demonstrates Nigeria's 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.





CHAPTER III

Governance & Institutions

Regulatory roles, investor principles and the cloud ecosystem





SECTION 5

Institutional and Regulatory Governance

Cloud and data-centre investment in Nigeria engages more than one regulator. This section clarifies which institution is responsible for which decision, so that investors and partners have a single, unambiguous reference for engagement. The table below is not exhaustive: other institutions, including the Federal Ministry of Power, NERC, NMDPRA, the Federal Ministry of Environment, ONSA/ngCERT, state governments, and development finance institutions are engaged on specific matters described in the relevant sections of this Strategy.

INSTITUTION	MANDATE RELEVANT TO CLOUD INVESTMENT	ROLE IN THIS STRATEGY
FMCIDE	Provide overall policy direction	Issue National Sovereign Cloud Policy and provide strategic oversight
NITDA	Lead IT regulatory agency; issuer of the Cloud First Guideline, NDIAF, Cloud Technical Document 2026; and secretariat to SovGov	Strategy owner and principal point of contact for regulatory guidance, including Approval in Principle (see Section 14)
Nigeria Data Protection Commission (NDPC)	Enforcement of the NDPA 2023 and its GAID; approval of PII cross-border data transfer mechanisms; data controller/processor registration	Data protection compliance,
Central Bank of Nigeria (CBN)	Foreign exchange policy and access; oversight of financial-sector data and payment systems infrastructure	FX access and repatriation queries; data governance for cloud hosting of regulated financial services (see Section 6.2)
Nigerian Communications Commission (NCC)	Licensing and regulation of telecommunications infrastructure	Connectivity, IXP interconnection, and last-mile fibre matters under Pillar 3
Nigerian Investment Promotion Commission (NIPC)	Pioneer Status incentives, One-Stop Investment Centre, general FDI facilitation and investor aftercare	Primary channel for fiscal incentive applications; coordinates with NITDA on sector-specific regulatory clearance
Sector regulators (e.g. NAICOM, NUPRC, NERC)	Sector-specific licensing and data/security requirements	Engaged on a case-by-case basis where sector-specific hosting or interoperability requirements apply
Bureau of Public Procurement (BPP)	Public procurement regulation and oversight	Governs public-sector procurement (see Section 18)

5.1 Investor Engagement Principles

Implementation of this Strategy shall be guided by the following principles in engaging domestic and international investors:

- 01 | Regulatory Coordination: Investors should experience a coordinated regulatory environment in which relevant institutions work collaboratively to facilitate investment while respecting their respective statutory mandates.

- 02 | Transparency: Regulatory requirements, certification procedures, technical standards, and investment pathways shall be publicly available and communicated clearly.
- 03 | Predictability: Investment decisions should be supported by clear policies, published procedures, defined timelines, and consistent regulatory interpretation.
- 04 | Single Point of Engagement: NITDA shall serve as the primary point of engagement for cloud investment matters and coordinate interactions with relevant government institutions where necessary.
- 05 | Technology Neutrality: Regulatory decisions shall remain technology-neutral and promote innovation, competition, and fair market participation.
- 06 | Collaborative Problem Solving: Government recognises that digital infrastructure projects are complex and will continue working collaboratively with investors to address implementation challenges while maintaining regulatory integrity.

5.2 SovGov — the Sovereign Cloud Governance Committee

SovGov, instituted under National Cloud Computing Guideline 2026, is an advisory body comprising representatives from NITDA, sector regulators, and other relevant stakeholders. Its role is to support the implementation of the regulatory and technical documents issued under the National Sovereign Cloud Initiative providing a single forum where cross-cutting issues such as certification standards, data classification disputes, and coordination with sector regulators are worked through collaboratively, rather than requiring investors to navigate each agency independently. NITDA serves as secretariat, and SovGov's full membership, terms of reference, and meeting cadence will be published on appropriate NITDA channels as the committee is operationalised.



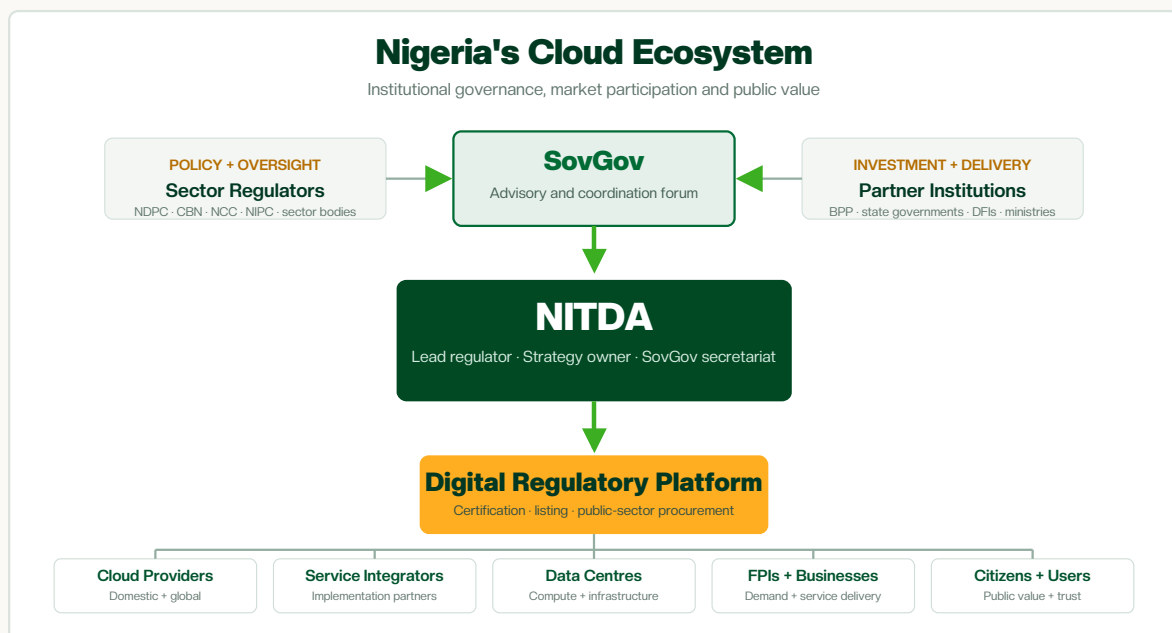


Figure 1: Nigeria's Cloud Ecosystem — institutional and market relationships.



CHAPTER IV

Strategic Pillars

The six pillars underpinning Nigeria's cloud investment strategy



SECTION 6

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-risking investment. It rests on six pillars, summarised below and detailed in the sections that follow. The pillars build in sequence: a stable policy and regulatory foundation (Pillar 1) underpins the capital mobilisation needed to fund infrastructure (Pillar 2); that infrastructure (Pillar 3) requires a skilled workforce to operate it (Pillar 4); together these enable Nigeria to become a producer rather than a consumer of digital innovation (Pillar 5); and cybersecurity and data protection (Pillar 6) provide the trust layer that underwrites every preceding pillar.

1	Policy & Regulatory Environment A modern, predictable, progressive investment regulatory landscape	2	Funding and Investment Mobilisation Mobilise and de-risk public and private capital
3	Infrastructure Development & Connectivity World-class fibre, data centre, power and IXP infrastructure	4	Digital Skills & Workforce Development A skilled pipeline of cloud talent across government, academia and industry
5	Innovation and Local Content Development Nigeria as a net producer, not just consumer, of digital innovation	6	Cybersecurity & Data Protection Resilience, trust and clear compliance standards for data in the cloud

6.1 Pillar 1 — Policy & Regulatory Environment

A modern, predictable, and progressive investment policy and regulatory environment, establishing a local landscape built on trust, regulatory clarity, and stability. This pillar aims to build global confidence in Nigeria's governance structures, accelerate public sector transformation, stimulate the growth of a resilient local cloud industry, and present a predictable regulatory front to international investors.

STRATEGIC ACTIONS

- 01 | Invest in collaborative policy and regulations development.
- 02 | Develop clear implementation guidelines under National Cloud Computing Guidelines 2026.



- 03 | Design incentives for local cloud providers and foreign providers making significant investments, coordinated through NIPC (see Section 5).

6.2 Pillar 2 — Funding and Investment Mobilisation

Achieving Nigeria's cloud ambitions will require sustained investment in cloud infrastructure, digital public infrastructure, and cloud skills development. This pillar seeks to mobilise and catalyse public and private capital, attract strategic investments, and deploy innovative financing mechanisms that strengthen investor confidence and support the long-term growth of Nigeria's cloud ecosystem.

To achieve these objectives, Government may explore blended financing mechanisms, public-private partnerships, development finance, infrastructure funds, and other investment mobilisation instruments to support cloud and data centre investments while promoting local participation and sustainable ecosystem growth. Before considering any new financing vehicle, Government will first assess the capacity of existing infrastructure, innovation, and development-finance mechanisms to support strategic cloud infrastructure, sovereign compute capacity, research, and skills development, so that any new instrument is additive rather than duplicative.

STRATEGIC ACTIONS

- 01 | Ensure routine and new strategic budgetary commitments to cloud infrastructure within FPIs.
- 02 | Partner with foreign investors to position Nigeria as a preferred destination for global cloud investment.
- 03 | Unlock strategic capital for the local cloud ecosystem, including through the potential designation of dedicated technology development zones, an option requiring further policy development to define legal basis, designating authority, and applicable incentives.

FOREIGN EXCHANGE CONSIDERATIONS

Foreign exchange access and repatriation certainty are consistently raised by hyperscale and data-centre investors as a precondition for capital commitment. This Strategy does not itself establish foreign-exchange policy; that authority rests with the CBN. NITDA's role is to ensure that cloud and data-centre investment is appropriately represented in any FX facilitation windows and investor-protection mechanisms made available by CBN and NIPC to strategic infrastructure sectors. Coordination on this item is placed with the SovGov committee, working jointly with CBN and NIPC; specific FX terms will be confirmed through that channel rather than committed to in this document.

No specific FX facilitation mechanism is committed in this strategy; the coordination pathway above reflects the current state of engagement between NITDA, CBN and NIPC on this issue.

6.3 Pillar 3 — Infrastructure Development & Connectivity

World-class digital infrastructure comprising national fibre optic networks, hyperscale-ready data-centre infrastructure, resilient energy solutions, and Internet Exchange Points (IXPs) enable secure, reliable, and affordable digital connectivity across Nigeria. This pillar seeks to accelerate nationwide broadband connectivity through strategic investments, including leveraging the implementation of Project BRIDGE and the rollout of approximately 90,000 km of additional fibre optic backbone infrastructure, while promoting the development of globally competitive data centres, strengthening power infrastructure for digital facilities, expanding internet exchange capacity, and creating the digital foundation required to position Nigeria as a regional hub for cloud services, artificial intelligence, digital public infrastructure, and cross-border digital trade.

POWER & ENERGY

- 01 | Grid reliability: national grid capacity and reliability remain insufficient for uninterrupted hyperscale operation in most locations, requiring embedded generation or hybrid power as the practical baseline rather than the exception.
- 02 | Power Purchase Agreements (PPAs): facilitate and incentivise PPAs and hybrid power infrastructure, coordinated with the Federal Ministry of Power and NERC, to give investors a predictable route to securing dedicated capacity.
- 03 | Embedded/captive generation: clarify the licensing pathway for embedded generation and gas-to-power arrangements serving data-centre campuses, working with NERC and the Nigerian Midstream and Downstream Petroleum Regulatory Authority (NMDPRA) where gas supply is involved.
- 04 | Siting near power corridors: infrastructure corridor access (Section 6.3 enablers, Section 15) should explicitly prioritise proximity to available or plannable power capacity when identifying data-centre-ready sites.

ENVIRONMENTAL & SOCIAL SUSTAINABILITY

- 01 | Water usage: large data centres are water-intensive for cooling; investors should be able to reference water-availability guidance for candidate sites, particularly in water-stressed states.
 - 02 | Renewable energy: encourage, without mandating, renewable and hybrid power sourcing for new data-centre capacity, aligned with any forthcoming national data-centre sustainability guidance.
 - 03 | Carbon and efficiency reporting: continuous alignment future National Cloud Computing Guideline updates with internationally recognised data-centre efficiency metrics (e.g. Power Usage Effectiveness) to give investors a comparable disclosure basis.
 - 04 | Coordination: sustainability requirements, if formalised, should be coordinated with the Federal Ministry of Environment rather than set unilaterally by NITDA.
-



STRATEGIC ACTIONS

- 01 | Advance ongoing projects to expand national fibre infrastructure and last-mile access.
- 02 | Attract data-centre investment through Public-Private Partnership (PPP) arrangements.
- 03 | Facilitate and incentivise Power Purchase Agreements (PPAs) and hybrid power infrastructure for data-centre campuses.

6.4 Pillar 4 — Digital Skills & Workforce Development

This pillar seeks to build a skilled workforce capable of designing, operating, securing, and innovating with cloud technologies. It aims to strengthen the pipeline of talent across education, industry, and government by embedding foundational cloud and digital skills into relevant curricula, expanding industry-academia collaboration, and delivering targeted capacity-building programmes for institutions. The objective is to produce job-ready professionals, strengthen indigenous technical capability, and enable Government and industry to adopt and manage cloud services effectively.

STRATEGIC ACTIONS

- 01 | Deliver training on vendor-agnostic cloud principles and practices.
- 02 | Establish industry-academia partnerships oriented around Cloud First development.
- 03 | Embed foundational cloud skills into curricula from primary through tertiary education.

6.5 Pillar 5 — Innovation and Local Content Development

This pillar seeks to reposition Nigeria from being predominantly a consumer of digital technologies to becoming a competitive producer of cloud-enabled products, platforms, and services. It aims to support innovation hubs and startups that can build, scale, and export cloud-native solutions, promote indigenous participation and local value creation in public procurement, and strengthen national research capacity in cloud computing and related emerging technologies.

STRATEGIC ACTIONS

- 01 | Co-invest in world-class innovation hubs that enable Nigerian startups to build, scale, and export cloud-native solutions.
- 02 | Promote indigenous participation and local value creation in cloud procurement, consistent with applicable public procurement law, competition principles, technical requirements, security considerations, and Nigeria's international obligations.



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- 03 | Develop national research capacity that leverages the cloud to drive innovation.
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6.6 Pillar 6 — Cybersecurity & Data Protection

Cybersecurity and data protection are fundamental enablers of Nigeria's cloud ecosystem, providing the trust, resilience, and regulatory certainty required to support digital transformation, critical government services, and private sector innovation. This pillar seeks to strengthen the security and resilience of cloud infrastructure, safeguard citizens' rights and sensitive data, and foster confidence among investors, service providers, government institutions, and users through a secure, risk-based, and internationally aligned cloud environment.

Government will continue to strengthen national cybersecurity capabilities, promote the adoption of recognised security and data protection standards, and encourage collaboration among public institutions, cloud service providers, and sector regulators to ensure a resilient and trusted digital ecosystem capable of supporting Nigeria's long-term digital economy ambitions.

STRATEGIC ACTIONS

- 01 | Strengthen the implementation of nationally recognised cybersecurity and cloud security standards to improve the resilience, security, and trustworthiness of cloud infrastructure and digital services.
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- 02 | Promote collaboration among government, cloud service providers, sector regulators, and relevant stakeholders to enhance cyber resilience, incident response, information sharing, and the protection of critical digital infrastructure.
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- 03 | Foster a secure and trusted cloud ecosystem by supporting continuous compliance with applicable cybersecurity, data protection, and risk management requirements, while promoting international best practices and investor confidence.
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CHAPTER V

The Investment Case

Why Nigeria, the market and the numbers behind the opportunity



SECTION 7

Why Invest in Nigeria's Cloud Ecosystem

Nigeria's competitive advantages for cloud and data-centre investment rest on a combination of market scale, Government demand, regulatory reforms, private-sector maturity, regional access, infrastructure investment, and workforce potential. The sections below set out the demand-side case (why Nigeria needs this investment) and the readiness case (why Nigeria is positioned to absorb it now).

7.1 Why Nigeria Needs This

Investment in cloud computing infrastructure and services is an essential enabler and multiplier for digital transformation and economic development. Meeting this demand will require credible long-term partners capable of deploying secure, scalable, and locally available cloud infrastructure.

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, interoperability, and citizen satisfaction.

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, underscoring the cloud's role as a growth enabler.

ENABLING STARTUPS AND INNOVATION

Nigeria hosts one of Africa's most vibrant startup ecosystems, anchored by an established network of tech hubs across the country. Cloud services lower entry barriers by providing affordable, on-demand computing power, allowing entrepreneurs to focus on product development rather than infrastructure.

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 help mitigate the cost of cyberattacks to the Nigerian economy, while boosting investor confidence in Nigeria's digital economy.

BOOSTING PRODUCTIVITY AND JOB CREATION

Cloud adoption drives productivity gains across sectors such as agriculture and manufacturing. 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.



ENABLING REGIONAL COMPETITIVENESS

Nigeria's participation in the African Continental Free Trade Area provides a strategic platform for deeper regional digital integration and expanded cross-border trade in services, strengthening the long-term case for locating regional cloud capacity in Nigeria.

7.2 Why Nigeria is Ready for This

Nigeria's readiness is supported by expanding digital demand, public-sector transformation, a mature fintech ecosystem, increased local internet traffic, and ongoing investment in national connectivity infrastructure.

Nigeria stands at a pivotal moment, presenting a compelling case for hyperscale data-centre investment on the continent. This readiness is not based on future promises but on the convergence of present-day realities. A massive, young, and digitally sophisticated population of is driving sustained growth in local data traffic and rising demand for faster, more reliable digital experiences.

This demand is met by a mature private sector, anchored by a fintech industry that processes large volumes of digital transactions. At the same time, Nigeria's Government is advancing a broad digital transformation, building on a foundation of to modernise public services, which requires secure, sovereign data infrastructure.

Nigeria's participation in AfCFTA provides a strategic platform for deeper regional digital integration and expanded cross-border trade in services, strengthening the long-term case for locating regional cloud capacity in Nigeria. As the nation embraces the growth of artificial intelligence, the need for low-latency local computing has become a strategic priority.

SECTION 8

Key National Indicators

8.1 A GOVERNMENT IN DIGITAL TRANSFORMATION

National Identity Number (NIN) enrolment

127 million IDs

One of the largest digital identity databases in Africa; requires robust, local data management (NIMC, Dec 2025)

8.2 AFRICA'S FINTECH POWERHOUSE

Electronic payment transaction value

N1.07 quadrillion (~US\$702.6bn) in 2024

Up 79.6% from ₦600 trillion in 2023, per NIBSS data; USD figure is an approximate conversion at prevailing 2024 exchange rates as reported by the source

8.3 GATEWAY TO SUB-SAHARAN AFRICA

Nigeria GDP

US\$187.76 billion (2024)

World Bank data; nominal USD GDP has declined since 2023-2024 following naira devaluation



8.3 GATEWAY TO SUB-SAHARAN AFRICA

Active internet users

148 million+ (NCC, Dec 2025)

Growing connected population

8.3 GATEWAY TO SUB-SAHARAN AFRICA

IXPN peak data traffic

2 Tbps (March 2026)

Doubled from ~1 Tbps in April 2025; indicator that keeping traffic local is a growing priority

8.4 AI-READY, DIGITALLY SOPHISTICATED POPULATION

E-commerce market size

US\$9.35 billion (2025)

Projected to grow at ~12.46% annually, driven by a mobile-first consumer base

SECTION 9

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.

Demand for cloud services in Nigeria is driven by two principal market segments: a growing private sector, led by fintech, e-commerce and digitally enabled SMEs; and a large public sector progressively modernising service delivery and consolidating eligible ICT demand.

As federal and state governments progressively modernise service delivery and consolidate eligible ICT demand, the public sector has the potential to become one of the country's largest and most stable consumers of certified cloud services.

SECTION 10

Public Sector Primed for Consolidation

10.1 Federal Government Spending

At the federal level alone, annual IT spending spans digitising government services, upgrading legacy data centres, and supporting foundational systems. NITDA's research and statistics function will publish a consolidated federal IT spend estimate to support investor due diligence.

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 has hitherto not been standardised, leaving every institution to decide based on its current capabilities often defaulting to on-premise.

10.2 State Government Spending

At the state level, fragmentation between ministries, departments and agencies is also common, with large year-on-year variability in technology spending.

SECTION 11

Private Sector Poised for Hyperscale Consolidation

The private sector, particularly the SME segment, is a key driver of Nigeria's economic growth, and cloud adoption can materially improve its efficiency and reach.

11.1 Low Digitalisation, Promising Penetration, Low Localisation

Nigeria's private sector presents a compelling dual opportunity for investors, defined by a sharp contrast between highly digitised industries (media & entertainment, banking, financial services & insurance (BFSI), fintech and e-commerce) and a vast, underserved foundational economy (MSMEs, healthcare, education). This dynamic creates a market with both proven, existing demand hosted in non-localised clouds, and enormous future growth potential from cloud-native innovation.

11.2 Increasing Sophistication of Service Offerings

There is increasing demand for data-heavy applications, with profound implications for infrastructure. Advanced analytics and the future adoption of AI/ML services are computationally intensive and require significant data processing power. Performing these tasks at operational scale over high-latency international links is often inefficient, slow, and cost-prohibitive.

SECTION 12

Regional Competitive Positioning

Nigeria competes for cloud and data-centre investment with several established and emerging African markets. Its principal competitive advantages are the scale of domestic demand, the depth of its fintech and digital-services ecosystem, strategic access to West Africa, expanding connectivity infrastructure, and Government's commitment to aggregating public-sector cloud demand. However, Nigeria must continue to address power reliability, foreign-exchange exposure, permitting complexity, skills availability, and regulatory coordination to convert these advantages into sustained investment.

SECTION 13

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 Government to build and operate data centres, but to act as a strategic enabler de-risking investment, facilitating access to applicable incentives, and creating a clear pathway for private capital to build the nation's digital infrastructure.

Incentive measures may include tax-related incentives, expedited permitting, access to suitable infrastructure corridors, power infrastructure support, public-private partnership support, investment facilitation, and other measures to be discussed with relevant government entities during implementation.

Fiscal incentives are channelled through NIPC's existing Pioneer Status and One-Stop Investment Centre mechanisms rather than a new, separate NITDA incentive regime, to avoid creating parallel or conflicting instruments for investors.





CHAPTER VI

Investment Pathway

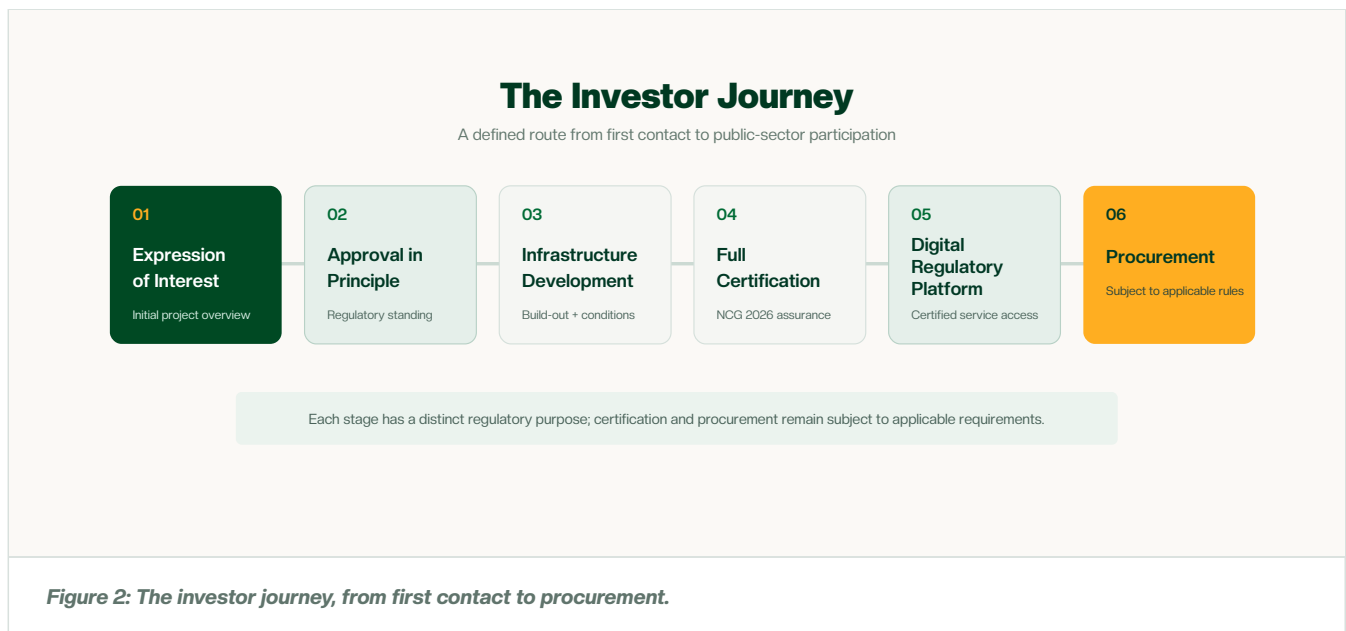
The Approval in Principle process
and NITDA investor support



SECTION 14

Investment Pathway: Approval in Principle

An investor considering Nigeria needs a clear, predictable pathway from initial interest to operational certainty. Section 14 sets out that pathway.



14.1 What NITDA Can Offer

NITDA can offer a structured, time-bound Approval in Principle (AIP): a documented statement, issued after regulatory review, confirming that a proposed investment is consistent with the NDIAF, National Cloud Computing Guidelines 2026, and applicable data governance requirements, and setting out the conditions under which full certification would follow.

An Approval in Principle issued under this Strategy is a preliminary regulatory facilitation instrument. It does not constitute a statutory licence, final certification, procurement commitment, fiscal incentive approval, land allocation, foreign-exchange guarantee, or approval otherwise required from another competent authority. It does not confer exclusivity or create an entitlement to Government patronage. Full certification and operational approval remain subject to satisfaction of applicable legal, technical, security, environmental, sector-specific, and institutional requirements.

14.2 AIP Process



STAGE	DESCRIPTION
1. Expression of Interest	Investor submits project overview (scope, location, data types, target sector) to NITDA
2. Regulatory Review	Review against NDIAF, data classification, National Cloud Computing Guidelines 2026 technical requirements, and NDPA compliance posture; NDPC consulted where cross-border data transfer is proposed
3. AIP Issuance	Formal Approval in Principle issued, documenting regulatory standing and any outstanding conditions
4. Full Certification	On satisfaction of conditions (e.g. physical build-out, security certification), investor proceeds to full certification under NDIAF and, where relevant, listing on the Digital Regulatory Platform.

14.3 NITDA Investor Support Services

Recognising that successful digital infrastructure investment requires coordinated engagement across multiple institutions, NITDA will serve as the primary regulatory interface for investors seeking to establish cloud infrastructure and services within Nigeria.

Subject to applicable laws and the mandates of relevant government institutions, NITDA will:

- 01** | Provide pre-investment consultations on regulatory requirements and applicable technical standards.
- 02** | Coordinate regulatory engagement with relevant government institutions where cross-sector approvals are required.



- 03 | Facilitate the Approval in Principle (AIP) process established under this Strategy.
- 04 | Provide guidance on certification requirements under the National Cloud Computing Guideline 2026 and the National Digital Infrastructure Assurance Framework.
- 05 | Support investors in understanding Government's Cloud First policy, and opportunities for public sector participation.
- 06 | Promote continuous dialogue between Government, industry, and development partners to strengthen Nigeria's cloud ecosystem.

These services are intended to improve regulatory clarity, reduce administrative complexity, and enhance investor confidence while maintaining compliance with applicable Nigerian laws and regulations.

Investors may initiate contact through NITDA's Office of the Director-General or via the enquiry channel published on the Digital Regulatory Platform, which serves as the confirmed institutional entry point for investor engagement. A dedicated investor enquiry mailbox will be published on appropriate NITDA channel as part of this Strategy's issuance.





CHAPTER VII

Delivery, Risk & Monitoring

Constraints, risk register, roadmap and performance measurement





SECTION 15

Infrastructure Development Constraints and Enablers

This section identifies the specific bottlenecks that most directly affect the pace and cost of cloud and data-centre investment in Nigeria, distinct from the strategic pillars in Section 6. Each constraint below is paired with the intervention required, the lead institution, and an indicative delivery period.

CONSTRAINT	CURRENT EFFECT ON INVESTMENT	REQUIRED INTERVENTION	LEAD INSTITUTION	INDICATIVE PERIOD
Unreliable and costly grid power	Forces reliance on embedded/captive generation, raising total cost of ownership for data centres	Facilitate PPAs and hybrid power infrastructure; clarify embedded-generation licensing pathway	Federal Ministry of Power; NERC; NMDPRA	2026–2029
Limited carrier-neutral fibre redundancy	Constrains latency and resilience for hyperscale-grade connectivity	Advance Project BRIDGE and last-mile fibre expansion; support carrier-neutral interconnection at IXPN	NCC; IXPN; FMCIDE; NITDA	2026–2029
Land acquisition and permitting	Slows site selection and construction timelines for data-centre campuses	Streamline permitting coordination for designated data-centre-ready sites; prioritise siting near power corridors	State governments; NITDA; NIPC; NEPZA	2026–2027
Foreign-exchange access and repatriation certainty	A consistently cited precondition for hyperscale capital commitment	Ensure cloud and data-centre investment is represented in CBN/NIPC FX facilitation windows	CBN; NIPC; SovGov	2026–2027
Import duty and customs treatment of data-centre equipment	Raises upfront capital cost for imported servers, cooling, and power equipment	Review customs classification and duty treatment for qualifying data-centre equipment	Nigeria Customs Service; Federal Ministry of Finance; NITDA	2027–2029
Shortage of hyperscale-ready sites	Limits the pipeline of sites meeting power, connectivity, and land-title requirements	Publish a national inventory of data-centre-ready sites with power and fibre access	NITDA; state governments	2026–2027
Specialist technical skills (cloud, data-centre operations)	Constrains the pace at which certified indigenous providers and operators can scale	Deliver targeted vendor-agnostic training and industry-academia partnerships under Pillar 4	Federal Ministry of Education; NITDA; industry partners	2026–2029
Certification and regulatory processing time	Uncertainty over timelines affects investor planning and capital deployment	Publish firm AIP and certification turnaround timelines (Section 14)	NITDA	2027
Access to long-term infrastructure finance	Limits the bankability of large-scale data-centre and connectivity projects	Engage development finance institutions and blended-finance mechanisms for qualifying projects	DFIs; NITDA; Federal Ministry of Finance	2027–2029

Risk Register

The risks most relevant to cloud and data-centre investment in Nigeria are set out below as a structured register, with mitigation approaches and lead institutions for each.

RISK	LIKELIHOOD	IMPACT	MITIGATION	LEAD INSTITUTION
Power supply constraints affecting data-centre uptime	High	High	PPA facilitation, embedded generation licensing pathway, siting near power corridors (Section 6.3)	NITDA / Federal Ministry of Power / NERC
Financing limitations for large-scale infrastructure	Medium	High	Blended finance, PPPs, development-finance mechanisms, infrastructure funds, and assessment of existing financing vehicles (Section 6.2)	NITDA / NIPC / DFIs



RISK	LIKELIHOOD	IMPACT	MITIGATION	LEAD INSTITUTION
Foreign exchange exposure	Medium	High	Coordination with CBN on FX facilitation for strategic infrastructure sectors (Section 6.2)	CBN / NITDA / NIPC
Skills gaps in cloud engineering and operations	Medium	Medium	Curriculum embedding, industry-academia partnerships (Pillar 4)	NITDA / Federal Ministry of Education
Cybersecurity threats to cloud-hosted government data	Medium	High	Implementation of nationally recognised cloud-security requirements, incident-response coordination, continuous compliance, and applicable certification and assurance requirements under NCG 2026 and NDIAF	NITDA / ngCERT / NDPC
Regulatory fragmentation across MDAs and states	Medium	Medium	SovGov as single coordination forum, institutional roles matrix (Section 5)	NITDA / SovGov
Low adoption readiness across federal/state institutions	Medium	Medium	Cloud First implementation, institutional readiness support, phased adoption, and Digital Regulatory Platform onboarding (Sections 17 and 18)	NITDA
Investor uncertainty over regulatory exclusivity claims	Medium	Medium	Formal Approval in Principle pathway; clear public messaging that legal exclusivity is not offered (Section 14)	NITDA

SECTION 17

Implementation Roadmap

Implementation proceeds in three phases, moving from institutional foundation-setting through market scale-up to regional consolidation.

2026–2027 — Foundation

- 01 | Operationalise SovGov and publish its membership, terms of reference, and meeting cadence.
- 02 | Publish the National Cloud Computing Guideline Technical Document and open the Digital Regulatory Platform for certification.
- 03 | Begin Cloud First implementation and compliance monitoring in pilot Federal Public Institutions.
- 04 | Publish firm AIP turnaround timelines and the Point of Contact for investor enquiries (Section 14.3).
- 05 | Expected market outcome: regulatory certainty established, providing the foundation required for early investment decisions.

2027–2029 — Scale-Up

- 01 | Extend Cloud First implementation and compliance monitoring across all Federal Public Institutions and begin state-level adoption.
- 02 | Process the first wave of hyperscale and data-centre investments through the AIP pathway.
- 03 | Roll out skills programmes and industry-academia partnerships under Pillar 4.
- 04 | Reach initial indigenous-provider certification targets.
- 05 | Expected market outcome: the domestic cloud ecosystem expands significantly as FPIs migrate and private-sector adoption accelerates, creating opportunities for indigenous providers, system integrators, and international technology partners.

2029–2032 — Consolidation

- 01 | Establish Nigeria as a recognised regional cloud and data-centre hub under AfCFTA.
- 02 | Achieve cross-government adoption of the Digital Regulatory Platform as the default procurement channel for cloud services.
- 03 | Sustain year-on-year growth in FDI inflows tracked via the AIP pathway.
- 04 | Mature a competitive indigenous cloud-service-provider ecosystem, reducing reliance on single-vendor dependency.
- 05 | Expected market outcome: Nigeria established as West Africa's preferred destination for hyperscale cloud infrastructure and regional data centres, supporting increased digital trade under AfCFTA.



SECTION 18

Implementation and Monitoring

Implementation of this Strategy shall be coordinated by NITDA through its operational departments, regulatory programmes, SovGov, inter-agency governance arrangements, and structured partnerships with Federal Public Institutions, sector regulators, development partners, and the private sector. Existing institutional coordination mechanisms may support implementation where relevant; however, no single mechanism shall substitute for the responsibilities assigned to the respective lead and partner institutions under this Strategy.

INDICATOR CATEGORY	NITDA'S COORDINATING ROLE	PARTNER INSTITUTION(S)	REPORTING FREQUENCY
Cloud adoption (FPIs on certified cloud)	Track adoption and coordinate Cloud First implementation and compliance monitoring	FPIs; Office of the Head of Service	Annual
Infrastructure investment (FDI into data centres)	Track investment facilitated through the AIP pathway (Section 14)	NIPC; CBN; SovGov	Annual
Indigenous participation (% of certified providers)	Monitor certification pathway outcomes via the Digital Regulatory Platform	NITDA; certified indigenous CSPs	Annual
Jobs and skills (cloud-related roles created)	Coordinate skills-training reporting with Education; coordinate employment data with Labour and NBS	Federal Ministry of Education (training); Federal Ministry of Labour and Employment; National Bureau of Statistics (jobs data)	Annual
Public-sector procurement value (via Digital Regulatory Platform)	Aggregate procurement data from the Digital Regulatory Platform distinct from FDI, which is tracked separately above	SovGov; Bureau of Public Procurement	Annual
Ecosystem growth (certified providers, listed services)	Publish certified-provider and listed-service counts	SovGov secretariat	Annual

Targets for each indicator category shall be agreed by NITDA with the relevant partner institution(s) and published through appropriate channel, consistent with the reporting frequency above. Execution responsibility sits with the named partner institutions in coordination with NITDA; NITDA's role is to convene, track, and publish progress rather than to execute each workstream unilaterally.

18.1 Performance Measurement

Performance is measured against the outcomes below. Where a baseline has not yet been established, NITDA will publish it by the date shown rather than substitute a directional statement for a target.

OUTCOME	KPI	BASELINE	TARGET	DEADLINE
Government adoption of Cloud First	% of FPIs completing cloud-readiness assessment and classifying eligible workloads	To be established by Q4 2026	100% of FPIs assessed and classified; all new eligible cloud procurements through the approved framework	2029 (framework requirement from 2027)



OUTCOME	KPI	BASELINE	TARGET	DEADLINE
Indigenous provider participation	Number of certified indigenous cloud service providers on the Digital Regulatory Platform	To be established at Digital Regulatory Platform launch (2026)	Final numeric target to be approved and published by NITDA following baseline validation	Q4 2027
Investment mobilisation	Value and count of investments receiving Approval in Principle	To be established from the first AIP issued (2026)	Final numeric target to be approved and published by NITDA following baseline validation	Q4 2027
Regulatory predictability	AIP and certification processing time	To be published by NITDA in 2026 (see Section 14.3)	Published turnaround time met or bettered in at least 90% of applications	From 2027
Workforce development	Cloud-related jobs created, construction and operations	To be established jointly with the Federal Ministry of Labour and Employment and NBS by 2027	Final numeric target to be approved and published by NITDA following baseline validation	Q4 2028
Cross-government adoption	Digital Regulatory Platform adoption rate across FPIs; number of participating states	To be established at Digital Regulatory Platform launch (2026)	All 36 states plus FCT registered; Regulatory Platform as default procurement channel across FPIs	2032
Procurement transparency and efficiency	Procurement cycle time through the Digital Regulatory Platform; SME contract share by value and volume	To be established at Digital Regulatory Platform launch (2026)	Final numeric target to be approved and published by NITDA following baseline validation	Q4 2027
Digital infrastructure capacity	Operational data-centre capacity (MW); domestic traffic exchanged at IXP	IXPN peak traffic: 2 Tbps (March 2026); data-centre capacity baseline to be established by NITDA in 2026	Final numeric target to be approved and published by NITDA following baseline validation	Q4 2027

NITDA shall publish an initial Strategy Performance Baseline and Target Schedule no later than Q4 2027, consolidating all validated baselines, approved numeric targets, responsible institutions, and annual reporting requirements under this Strategy.



CHAPTER VIII

Conclusion & Reference



SECTION 19

Conclusion

Nigeria's scale, digital economy, strategic location, expanding connectivity infrastructure, innovative private sector, and growing demand for cloud services create a significant opportunity to establish the country as a leading regional cloud and digital infrastructure hub. Realising this opportunity will require coordinated implementation, sustained regulatory certainty, reliable infrastructure, investable project pipelines, and effective collaboration between Government and the private sector.

Through the National Sovereign Cloud Initiative and the regulatory, governance, assurance, and investment instruments developed under it, Government is establishing the foundations for a secure, resilient, competitive, and investment-ready cloud ecosystem. The Strategy provides a framework for mobilising private capital, strengthening domestic capabilities, accelerating cloud adoption, and attracting the infrastructure required to support artificial intelligence, digital public services, financial technology, e-commerce, and regional digital trade.

Successful implementation will position Nigeria to meet its domestic cloud and data infrastructure requirements while serving the wider West African and African market.

The implementation of this Initiative will continue to be supported through coordinated implementation, transparent stakeholder engagement, periodic performance reporting, and sustained collaboration with investors, service providers, sector regulators, development partners, and indigenous technology companies.





SECTION 20

Invitation to Invest

Nigeria invites domestic and international investors, cloud service providers, system integrators, and development partners to build its sovereign cloud ecosystem together. The regulatory foundation is in place: the NITDA Act, the Nigeria Data Protection Act, and the National Cloud Guideline 2026 give investors legal certainty. The institutional foundation is in place: SovGov, NITDA, and named sector regulators give investors a single, predictable point of engagement. And the market foundation is in place: a Government progressively implementing Cloud First requirements and aggregating eligible public-sector demand, a fintech-led private sector already running on cloud infrastructure, and a young, digitally fluent population driving sustained demand.

Government's commitment is to regulatory certainty, active collaboration, and long-term market development not to picking winners or offering exclusivity that would undermine a competitive market. What NITDA offers instead is a defined pathway: submit an Expression of Interest, proceed through Approval in Principle, build and certify under NCG 2026, and list on the Digital Regulatory Platform as a certified provider to Nigeria's public sector (Section 14).

Investors ready to take the first step should contact NITDA through the channel set out in Section 14.3. The opportunity is significant, the framework is defined, and Government is ready to engage.

SECTION 21

Abbreviations

ABBREVIATION	MEANING
AfCFTA	African Continental Free Trade Area
AI	Artificial Intelligence
AIP	Approval in Principle
BFSI	Banking, Financial Services and Insurance
CBN	Central Bank of Nigeria
CSP	Cloud Service Provider
DFI	Development Finance Institution
DG	Director-General



ABBREVIATION	MEANING
ECOWAS	Economic Community of West African States
ERGP	Economic Recovery and Growth Plan
FDI	Foreign Direct Investment
FMCIDE	Federal Ministry of Communications, Innovation and Digital Economy
FPI	Federal Public Institution
FX	Foreign Exchange
GAID	General Application and Implementation Directive
GDP	Gross Domestic Product
ICT	Information and Communication Technology
IT	Information Technology
IXP	Internet Exchange Point
IXPN	Internet Exchange Point of Nigeria
KPI	Key Performance Indicator
MDA	Ministry, Department and Agency
NAICOM	National Insurance Commission
NAIS	National Artificial Intelligence Strategy
NCC	Nigerian Communications Commission
NCG 2026	National Cloud Guideline 2026
NDEPS	National Digital Economy Policy and Strategy
NDIAF	National Digital Infrastructure Assurance Framework
NDPA	Nigeria Data Protection Act
NDPC	Nigeria Data Protection Commission
NDPR	Nigeria Data Protection Regulation
NERC	Nigerian Electricity Regulatory Commission
NEPZA	Nigeria Export Processing Zones Authority
NGDX	Nigeria Data Exchange
NGEA	Nigerian Government Enterprise Architecture
NIBSS	Nigeria Inter-Bank Settlement System
NIMC	National Identity Management Commission



ABBREVIATION	MEANING
NIN	National Identity Number
NIPC	Nigerian Investment Promotion Commission
NITDA	National Information Technology Development Agency
NMDPRA	Nigerian Midstream and Downstream Petroleum Regulatory Authority
NSCI	National Sovereign Cloud Initiative
NUPRC	Nigerian Upstream Petroleum Regulatory Commission
PPA	Power Purchase Agreement
PPP	Public-Private Partnership
SI	System Integrator
SME	Small and Medium Enterprise
SPV	Special Purpose Vehicle
SRAP	Strategic Roadmap and Action Plan
USD	United States Dollar

**Size the Opportunity.
Signal the Support.
Start the Conversation.**

