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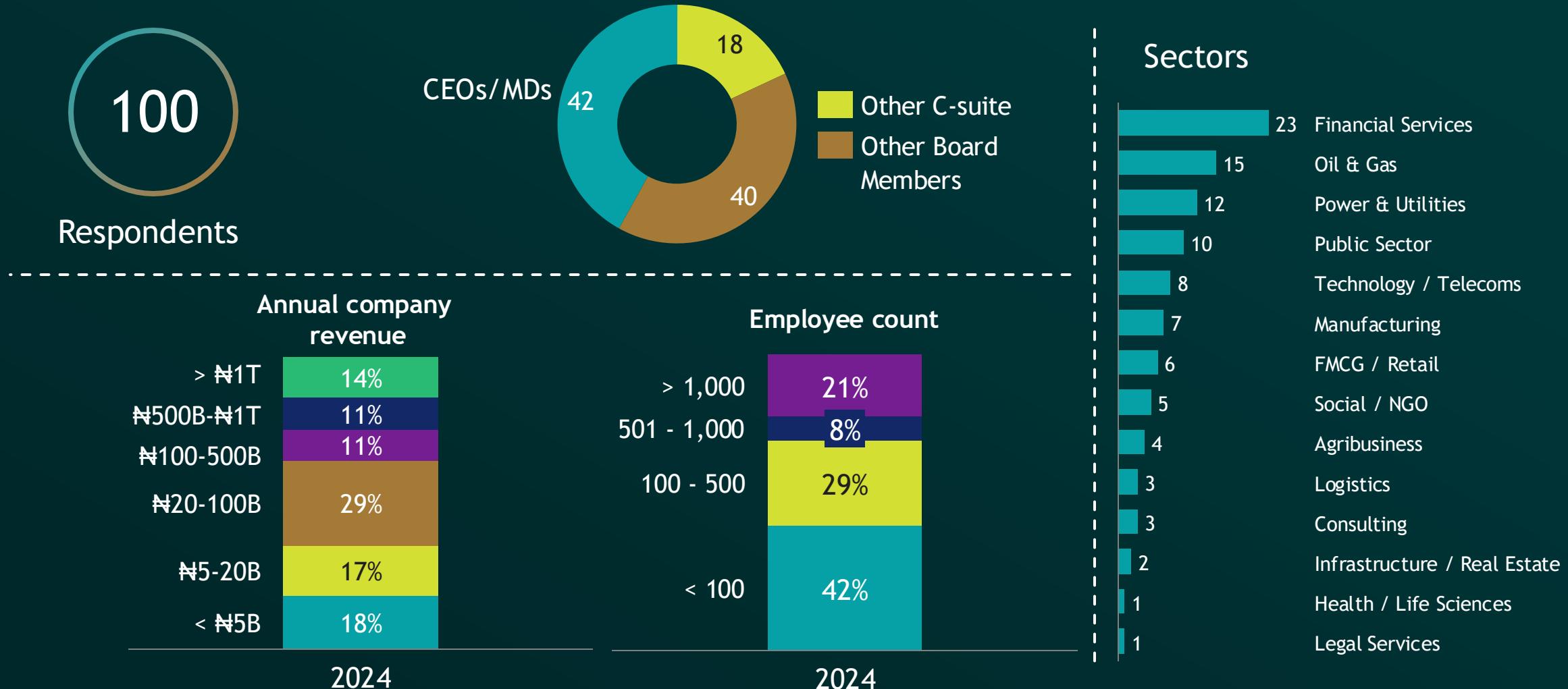


BOSTON
CONSULTING
GROUP

Nigeria's leaders are betting on growth, but capability will set the pace

Reflections on Nigeria Executive Outlook 2025

Survey Methodology¹ : Our perspective is informed by a broad base of leadership experience in Nigeria



1. The Nigerian Leadership Outlook Survey combines qualitative indicators on Economy, Leadership and Talent Development, Product Innovation, Digital Transformation, GenAI, ESG and Sustainability to gauge governance sentiment, strategic priorities, and the overall level of leadership optimism regarding Nigeria's economic landscape and institutional resilience.

Key takeaways



Improved market sentiment is driving leaders to focus on domestic growth and talent

51% rank *domestic growth and talent* in top three strategic priorities

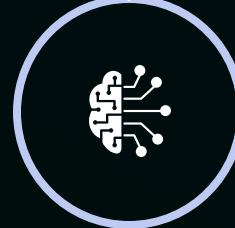
74% say business environment has improved vs. 2024



Execution capability is the critical bottleneck

Execution management is the most underdeveloped capability

35% cite *leadership & talent gaps* as main internal constraint



GenAI ambition is high, but adoption is still limited

63% of Nigerian organizations are still exploring or piloting with AI

83% of leaders expect to integrate GenAI in 12-24 months

Takeaway 1

Improved market sentiment is driving leaders to focus on domestic growth and talent

74%

of leaders say the
business environment
is better than last year

VS. 2024

Source: Nigeria Executive Outlook 2025; BCG Analysis
Question: Compared to last year, how has the business environment changed? Five
options given; Much better; Better; Neutral; Worse; Much Worse"

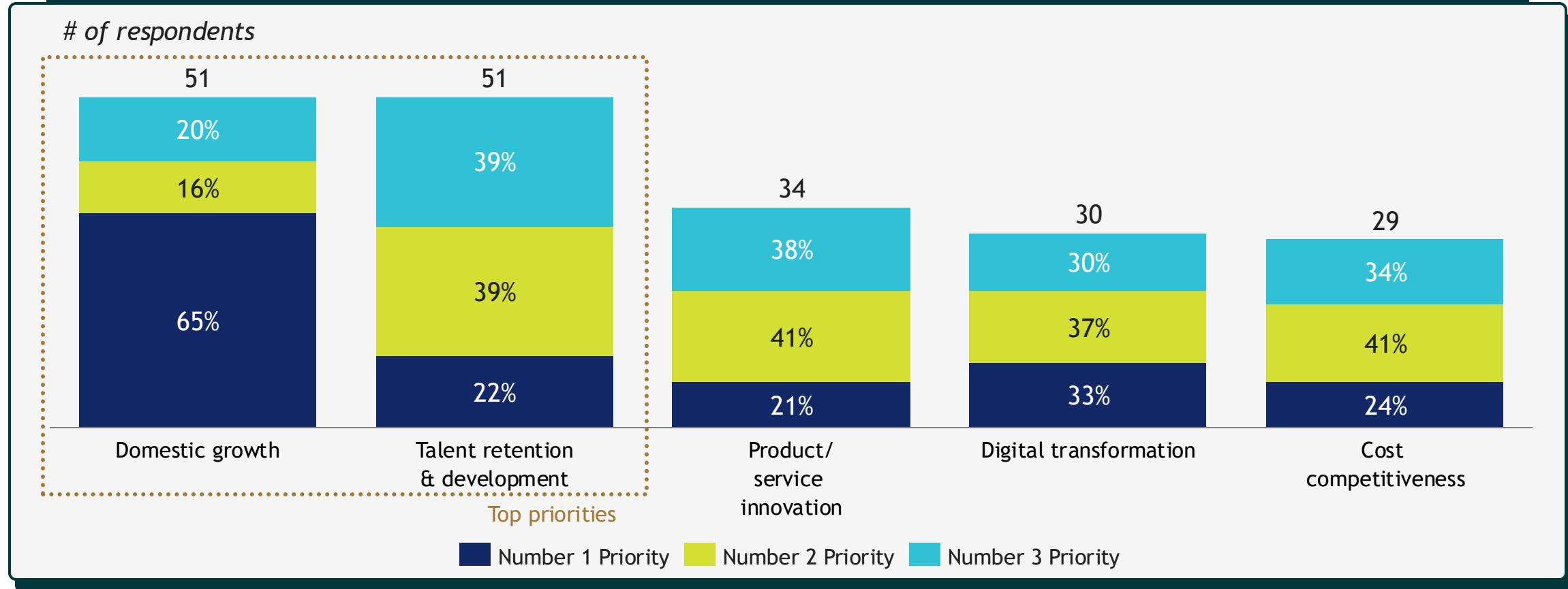
64%

express confidence in
government policy

Question: How confident are you that government policy over the next 12 months will
support private sector growth? Five options given; Very confident; Somewhat
confident; Neutral; Somewhat Unconfident; Neutral"

Leaders prioritise domestic growth and talent retention & development

Top strategic priorities for Nigerian leaders for the next 3 years



Question: Rank your top 3 strategic priorities for the next 3 years (The list contains 10 choices, including an "Other..." option)
Source: Nigeria Executive Outlook 2025; BCG Analysis

Leaders indicate FX as the key external factor influencing their strategic plans

Three core themes are influencing how leaders form their strategic decisions today



1. Foreign Exchange

Source: Nigeria Executive Outlook 2025; BCG Analysis
Question: What is the biggest internal challenge preventing your organization from delivering on its strategic priorities and transformation efforts? (Open questions - two answers requested - bucketed in key themes)

Takeaway 2

Execution capability is
the critical bottleneck

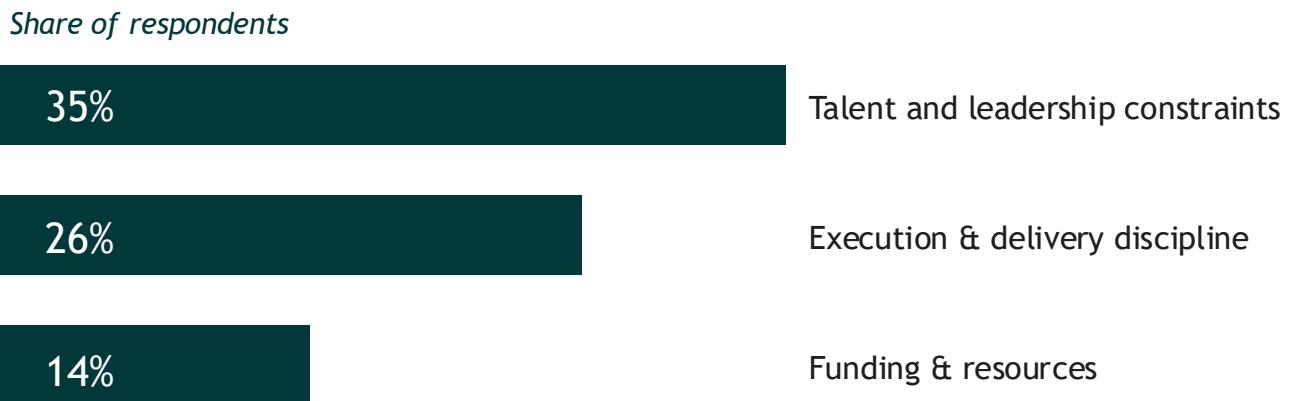
Delivery is constrained by execution, digital fluency, and leadership & talent constraints

Source: Nigeria Executive Outlook 2025; BCG Analysis

Top three capabilities currently most underdeveloped in Nigerian organizations relative to their ambitions



Top three internal challenges preventing organizations from delivering on strategic priorities and transformation efforts



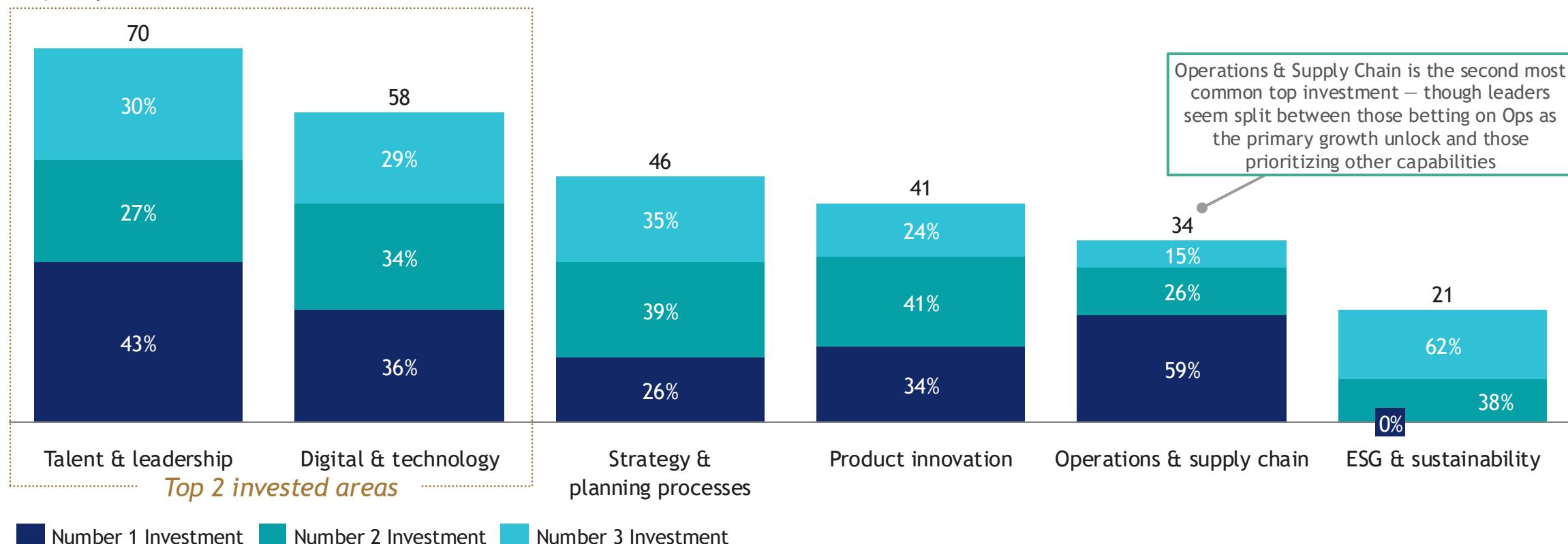
Question: Which capabilities are most underdeveloped in your organization relative to your ambitions? (Select up to 3 of given list of 9 options)]

Question: What is the biggest internal challenge preventing your organization from delivering on its strategic priorities and transformation efforts? (Option questions - bucketed in key themes - multiple answers possible)

Nigerian leaders are investing in talent and digital capabilities to support growth aspirations

Top investment priorities for Nigerian leaders today

of respondents



Source: Nigeria Executive Outlook 2025; BCG Analysis

Question: Which areas are receiving the most investment to close capability gaps? (Rank up to 3: where 1 = Highest investment priority; 3 = Lowest investment priority) - (The list contains 13 choices, including an "Other..." option)

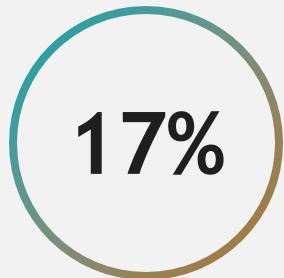
Takeaway 3

GenAI ambition is high, but adoption is still limited

GenAI adoption in Nigeria remains early-stage, with most organizations still exploring or piloting use cases compared with the global average

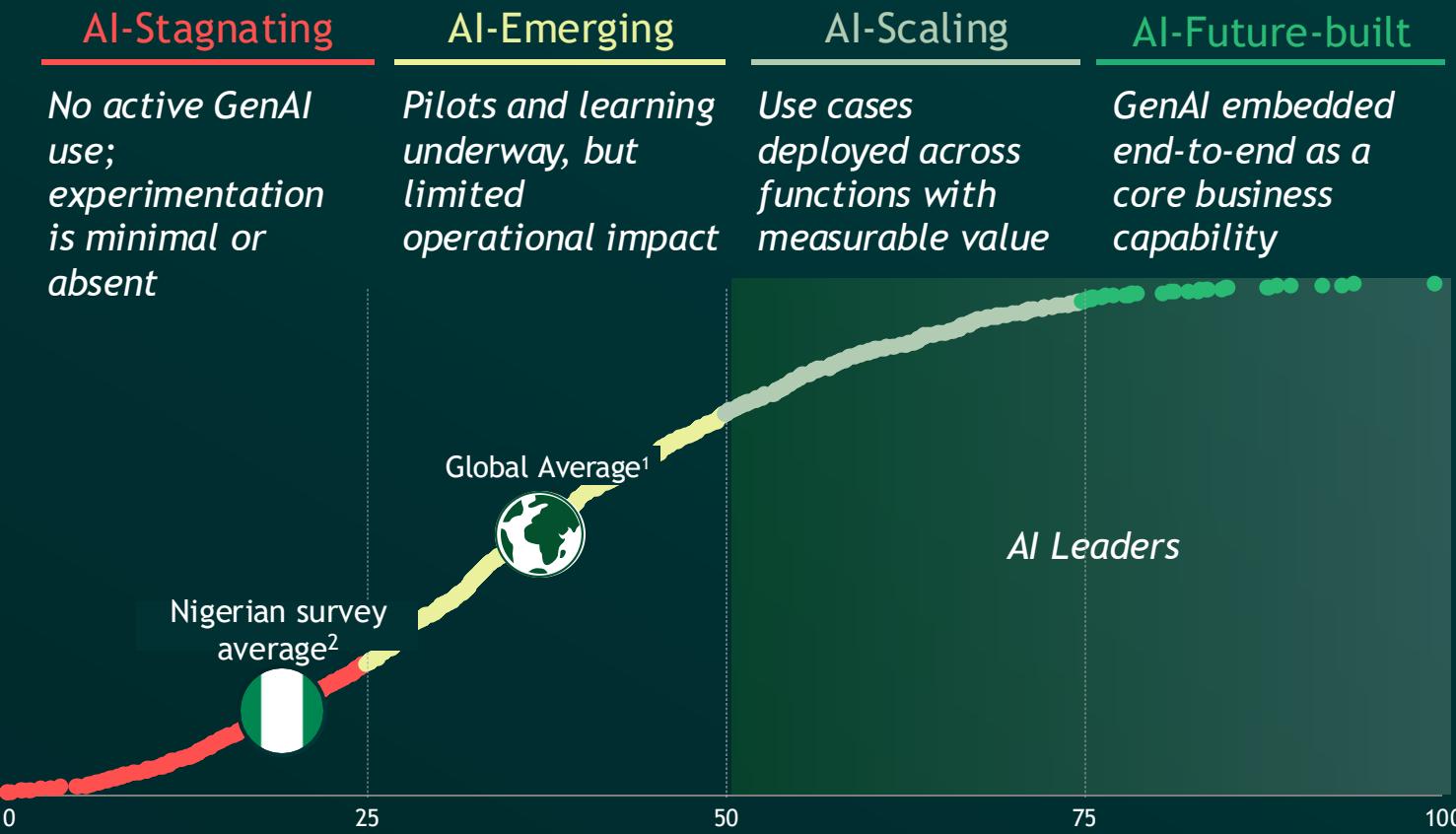


of Nigerian organizations are **still exploring or piloting** with AI



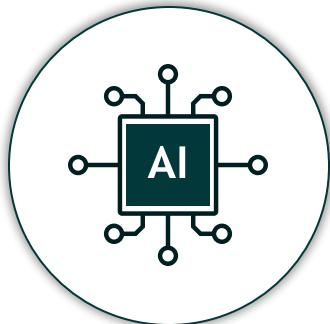
have **scaled or embedded** GenAI in their organization

Source: Nigeria Executive Outlook 2025; BCG Analysis
Question: How would you rate your organization's current GenAI maturity? Choose from 'N/A'; 'I don't know'; 'Exploring ...'; 'Experimenting ...'; 'Scaling ...'; 'Embedding ...'; 'Transforming ...' where "... refers to the description of the stage provided in the survey



1. Global sample size included ~1000 orgs across 29 sectors. 29% of organizations assessed AI-stagnating, 49% AI-emerging, 22% AI-scaling and 4% AI-future-built 2. N=100

Leaders' GenAI ambitions begin with productivity, with transformation as the prize

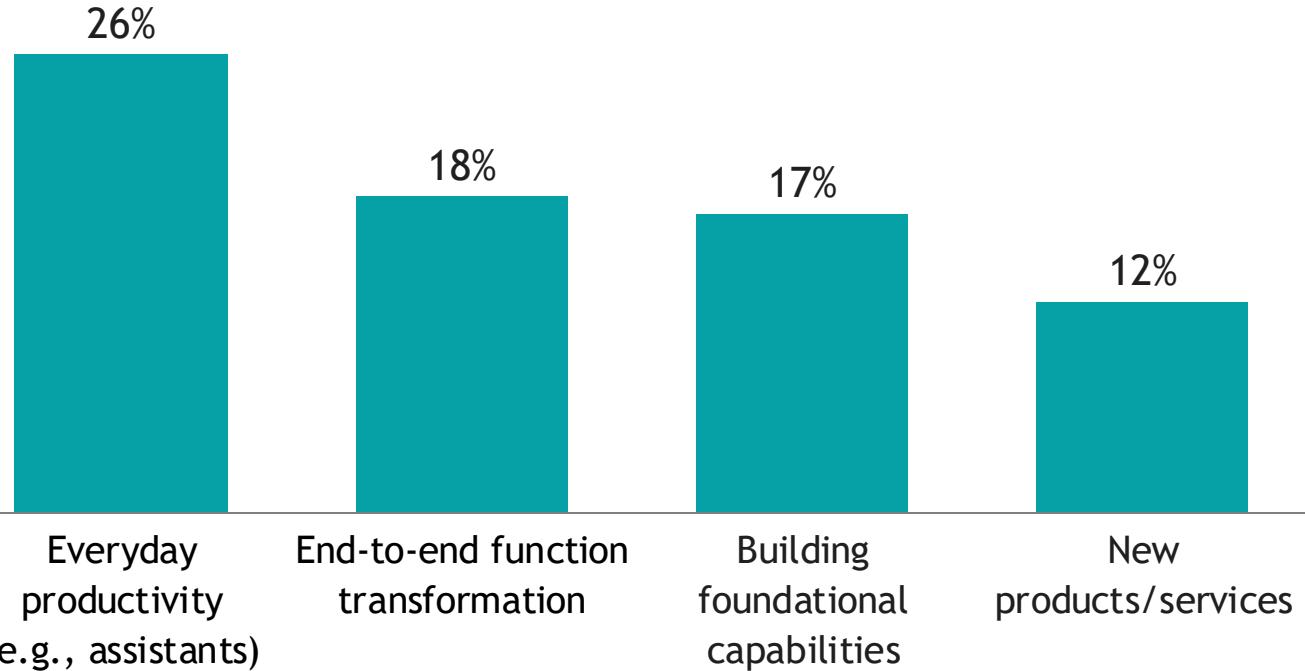


83%

expect to integrate GenAI within
12-24 months



Nigerian Organizations' Top Ambition for GenAI in the Next 12-24 Months



Source: Nigeria Executive Outlook 2025; BCG Analysis

Question: What is your organization's top ambition for GenAI in the next 12-24 months? (Select one out of six options -'I don't know' 'N/A'; 'End-of-end function'; 'Responsible & Compliant AI adoption'; 'Building foundational capabilities'; 'New products/services'; Everyday productivity (e.g., assistants))

Four imperatives for Nigerian leaders in 2026

1

Plan with Optimism and Resilience

Confidence is returning, but uncertainty lingers. Ensure your plans are agile enough to flex under stress

2

Invest Where Capability Unlocks Value

Redirect capital and leadership time toward capability gaps; particularly in data, execution, and digital fluency

3

Upskill for GenAI and Digital

Move from pilots to programs. Prioritize use-case clarity, talent development, and responsible adoption frameworks

4

Build the muscle to execute

Invest in transformation management, execution discipline, and cross-functional leadership alignment

1

Nigerian leaders can stay resilient by adopting an ‘uncertainty advantage’ principle in strategic planning amid persistent macro-level volatility

Uncertainty Advantage is anchored on strengthening strategy and constantly disrupting/reinventing using volatility as a source of advantage and competitive edge

3 core components to an Uncertainty Advantage



Signal
advantage



Decisive
move
advantage



Resilience
advantage

1

Four questions could drive a faster, more flexible, and proactive risk-intelligent approach to strategic planning to unlock uncertainty advantage

1

What worlds might we be operating in?

- Define scenario(s) describing how the world will evolve
- Link to key risk indicators which signal they are materializing
- Determine risk appetite

2

What could winning look like?

- Define the winning value proposition and operating model in each scenario
- Tie each to plausible core and adjacent actions / capabilities to achieve it

3

Which investments are most attractive and resilient?

- Evaluate the value creation/protection tradeoff for each action & capability
- Identify those capabilities that will be required in any scenario
- Reevaluate risk appetite

4

How aggressively can we move without limiting flexibility?

- For each scenario, determine the decision point to act
- Allocate resources to initiatives required under any scenario
- Continuously monitor to make quick contingency decisions on "if / then"



Signal Advantage



Decisive Move Advantage



Resilience Advantage

3 Nigerian organizations can leverage Gen AI to unlock their full growth potential

Roles, operating models, and org structures

Greater productivity and redesigned work



New roles to govern and unlock AI potential



Reimagined processes and ways of working



Redesigned organizations reflecting changed work



Behavioral science, nudges at scale



Purpose, culture, and change management

Talent and skills

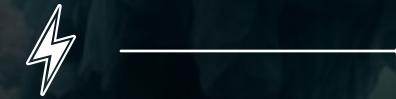
Changing skillset requirements and new career paths



Revamped HR processes (e.g., talent acquisition, performance management)



AI enabled performance management



Personalized training

Extensive change management needs



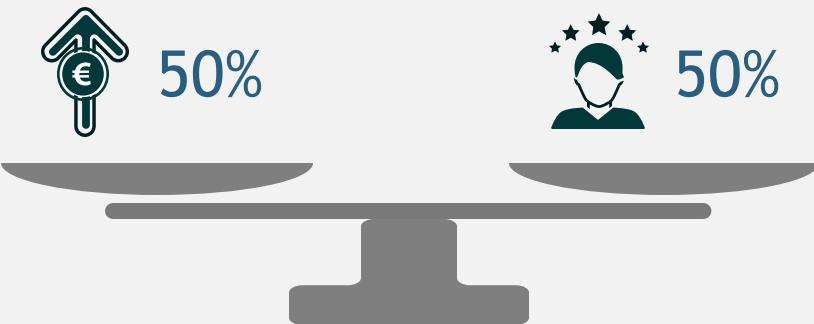
3 How is it being used | Many industries are piloting GenAI applications

								Not comprehensive
Functions	Marketing	Sales	Logistics & distribution	Customer support	Customer success	Legal	Finance	Human resources
GenAI Use Cases	Hyper-personalized campaigns	Personalized sale pitch generation	Conversational assistant for logistics coordination	Conversational assistant responding to customer queries	Dashboard and report generation to track key metrics	Legal document review and synthesis to extract key points	Business case draft	Conversational assistant for employee knowledge mgmt.
	White papers, blogs commercial, and ad writing	Demos tailored to customer environment	Supply chain optimization from demand forecast*	Auto-generated user guides & tutorials	Account profile generation to find upsell opportunities	Convert Legalese into plain English	Financial statement & budget draft	Virtual recruiter for sourcing, interviewing, and screening
	Visual marketing material generation	Client outreach email writing	Robot route planning in warehouse*	Support swarming w/ recommended resolutions	Customer sentiment and experience mgmt.	Contract draft creation	Sale forecasting using full body of data (e.g., AE sentiment)*	Workforce training and job simulation
Sample adopters	Coca cola	Realtor.com Twillo	Lippert	Salesforce PNC	ConsumerAffairs FiscalNote	American Subcontractors Associations Beiersdorf	BNY Mellon	PaloAlto Albemarle
Potential Impact	5-10x Faster content generation ¹	4x Reply rates ²	99% Accuracy in order execution ³	42% Outbound calls eliminated ⁴	12% Net rev. retention increase ⁵	70% Increase in productivity ⁶	5x Faster deployment ⁷	2x Faster resolution of support issues ⁸

*Long term use case that requires further evolution of underlying technologies 1. Jasper website 2. Lavender website 3. Avaamo website 4. Ushur website 5. ChurnZero website 6. BlackBoiler website 7. Boltzbit website 8. Moveworks website; Source: Desktop research; BCG analysis

4 Building the muscle to execute ensures the desired change actually happens...

Performance (“WHAT”) Execution certainty & enablement (“HOW”)



Source: BCG Analysis

- 1 **Reinforcing governance and practices** to drive value delivery
- 2 **Right transformation team** with clear roles and responsibilities
- 3 **Financial discipline** employed to drive accountability and ensure real impact
- 4 **Rigorous stage gate methodology** to ensure clarity on the maturity of initiatives
- 5 **Robust tools & reporting** providing one source of truth and real-time, efficient tracking
- 6 **Culture and change initiatives** and milestones in focus for leaders, included everywhere relevant