



Inclusive Futures

Promoting disability inclusion

Labour Market Assessment - Nigeria

2021 Refresh



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Nigeria Labour Market Assessment 2021

Executive Summary

Entering 2020, Nigeria was already facing economic challenges with the Saudi-Russia led oil supply dispute driving down world prices and a key revenue stream funding public sector employment in the country. The addition of COVID-19 saw a steep plunge in GDP to -6% year-on-year in Q2 2020 and a technical recession in Q3. Surprising though was a return to positive GDP growth in Q4, albeit minor, and continued marginal growth in Q1 2021. Agriculture and manufacturing led the recovery, with services – as in most economies globally – lagging.

Unemployment, already relatively high, grew significantly in Q4 2020 to 17.5%; with youth, women, the higher educated and urban populations disproportionately impacted. This is likely related to the struggles of the services sector, that also of the informal sector, and the effect of COVID-19 on international economic migration. Underemployment and a shift to agricultural livelihoods have driven down household income. Food inflation compounded stresses on household income, as did a significant fall in international remittances on which half of households depend. African Development Bank forecasts are for economic growth of 1.5% in 2021 and 2.9% in 2022, although these dependent on a non-resurgence of COVID-19.

Government stimuli largely focused on agriculture, manufacturing and public sector (infrastructure, energy sector and digital) job creation. Stimulus packages predominantly benefited larger companies in the form of tax rebates, with the majority of SMEs being unregistered, operating in the informal sector while generating more than 90% of employment. Safety net payments reached only a fraction of the country's poor, being limited to those registered in the National Social Register. Credit stimuli again reached just a fraction of the poor, with loans dependent on collateral.

Notable in the 2019-2021 period has been the enacting of the Discrimination Against People with Disability (Prohibition) Act. The (Disability) Act requires companies to reserve 5% of their workforces to peoples with disabilities and establishes a National Commission for Persons with disability (NCPD) to monitor and enforce its provisions. Large employers are recognising the Act and realising that change in inclusion is now a priority, albeit from a low base. Very positively, the Central Bank is now requiring the banks to report inclusion in sustainability reporting.

Across sectors, employers are recognising that distanced working is the new norm, requiring digital skills and prioritising soft skills – included a repeated reference to emotional intelligence (and so empathy and resilience) above educational intelligence. Jobseekers have seen little material change in attitudes since 2019. Societal attitudes continue to create significant barriers, with perceptions of low capabilities and employers continue to consciously discriminate against people with disability in recruitment, irrespective of capabilities. Access to finance continues to be a barrier for potential entrepreneurs with disabilities. Jobseekers with disabilities also felt that vulnerabilities in employment have negatively changed over the past two years, with increased risk of sexual, verbal, and

physical abuse. OPD leaders and a representative of higher education referenced weak implementation/awareness of the Disability Act.



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Background

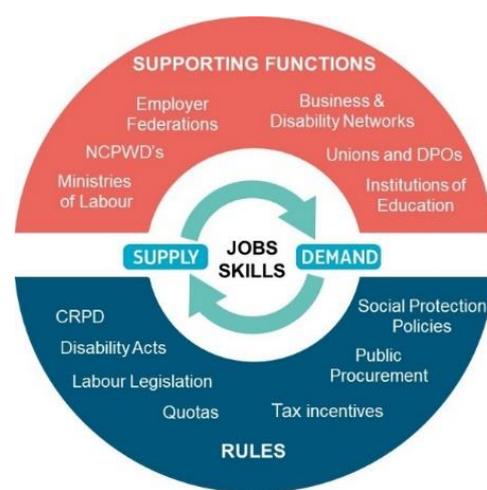
Inclusion Works is a UKAid funded programme implemented by a consortium of international and national development agencies and disability organisations. The four-year programme ending June 2022, evidences how labour market systems can adapt to be more inclusive of persons with disabilities in formal employment. It does that in Bangladesh, Kenya, Nigeria, and Uganda.

One of the programme's first implementation actions in 2019, was to complete labour market assessments (LMAs) in all four countries, recognising that programme first needed to have an objective assessment of how labour market systems in those countries function, or dysfunction, in relation the disability.

Those initial assessments adopted a Markets for Poor (M4P) approach to mapping demand for and supply of labour, supporting functions and regulatory frameworks (the “rules” of the system). The LMAs significantly influenced the programme; in recognising that often employers increasingly aspire to a more inclusive workforce but lack know-how and employer disability confidence; and that jobseekers with disability aspired to formal employment (including self-employment) but lacked employment readiness and self-confidence. Missing in the labour market system was a capacity building function to address that and act as a meaningful bridge between demand and supply. The original labour market assessment for Bangladesh can be found at

<https://asksource.info/resources/labour-market-assessment-inclusion-works-nigera>.

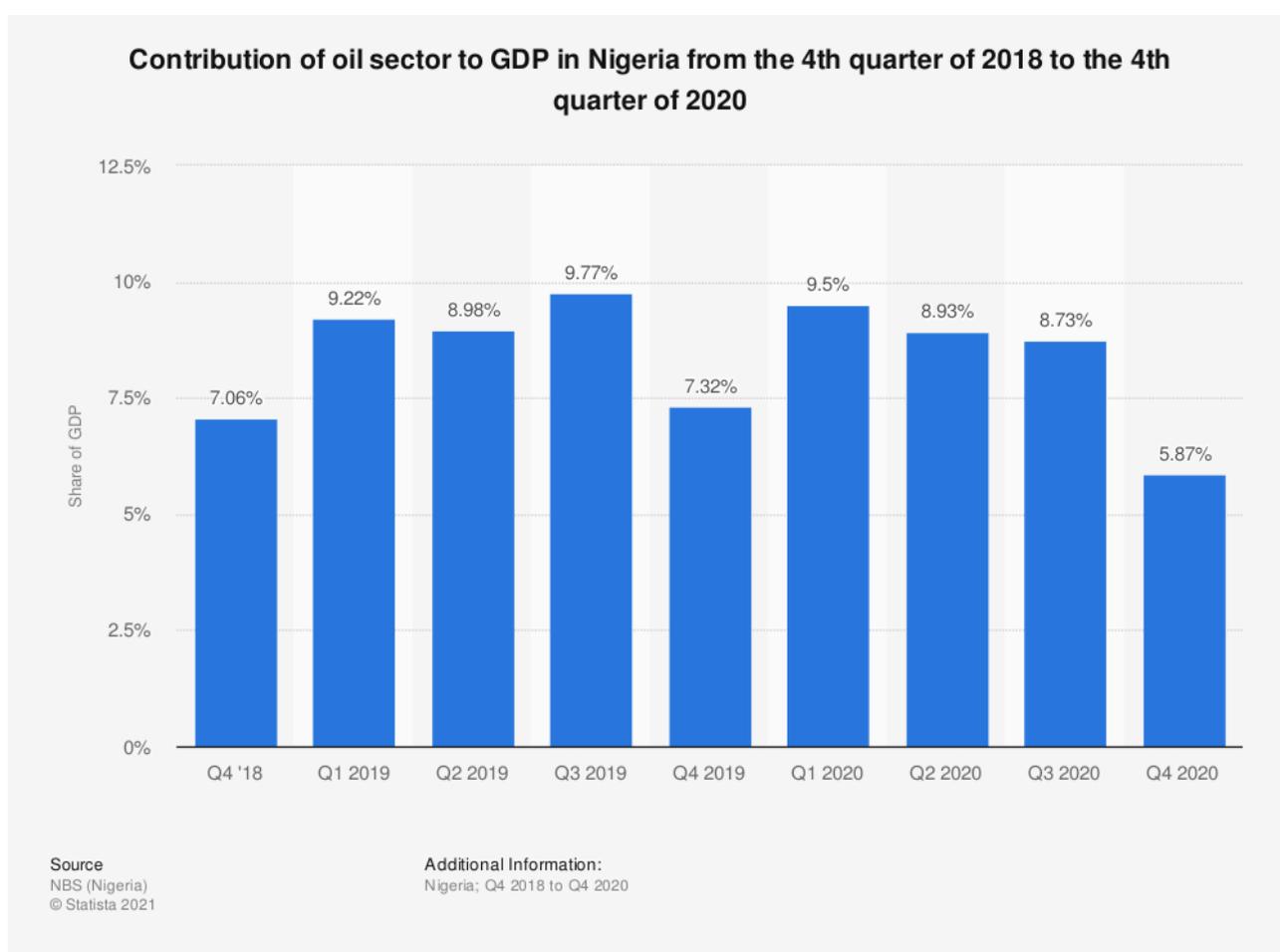
The Inclusion Works programme has now refreshed those initial labour market assessments (LMAs) in 2021, again following a structured M4P framework, and recognising that labour markets conditions will have evolved since 2019; not least in light of COVID-19. While the foundation (2019) LMAs first considered which sectors have the greatest opportunity to generate more inclusive employment (versus contribution to GDP growth, recognising that the two are not necessarily the same), the 2021 refreshed LMAs first considered how the macro economy weathered the pandemic, sector by sector. It has researched the effectiveness and inclusivity of economic stimulus/recovery packages and also any changes in labour market regulatory frameworks post-2019 relative to disability. The refreshed LMAs have then gathered opinions from the demand, supply and supporting functions of the system to gain an updated primary perspective on what has, or has not changed, within the system post-2019.



1. Macro-economic context

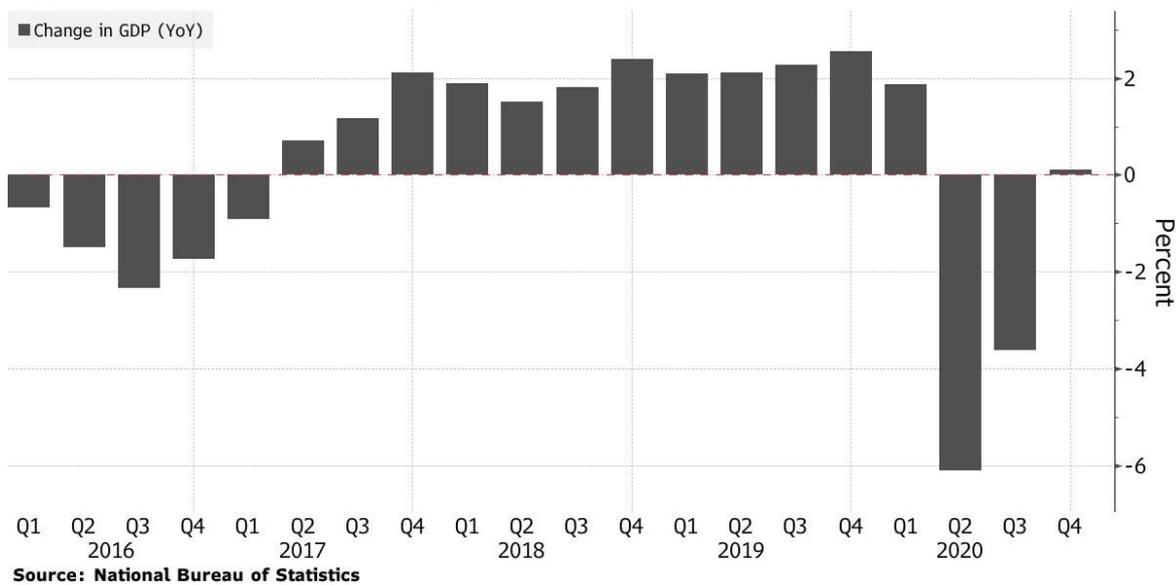
1.1 Key economic indicators

While not a significant generator of direct employment, Nigeria's Oil & Gas sector has been an important contributor to Gross Domestic Product (GDP); 80% of exports and ~50% of consolidated government revenues which finance employment within the public sector comes from Oil & Gas in Nigeria. Oil prices were already stressed at the beginning of 2020, with over production driving down crude prices globally. While over-supply was somewhat rebalanced in mid-2020, as Russia and Saudi Arabia agreed production cuts, global demand significantly reduced throughout the rest of the year as the impact of COVID-19 on economic activity became more tangible – all at a time when revenues were even more critical than before, in terms of fighting the health and economic consequences of the global pandemic.



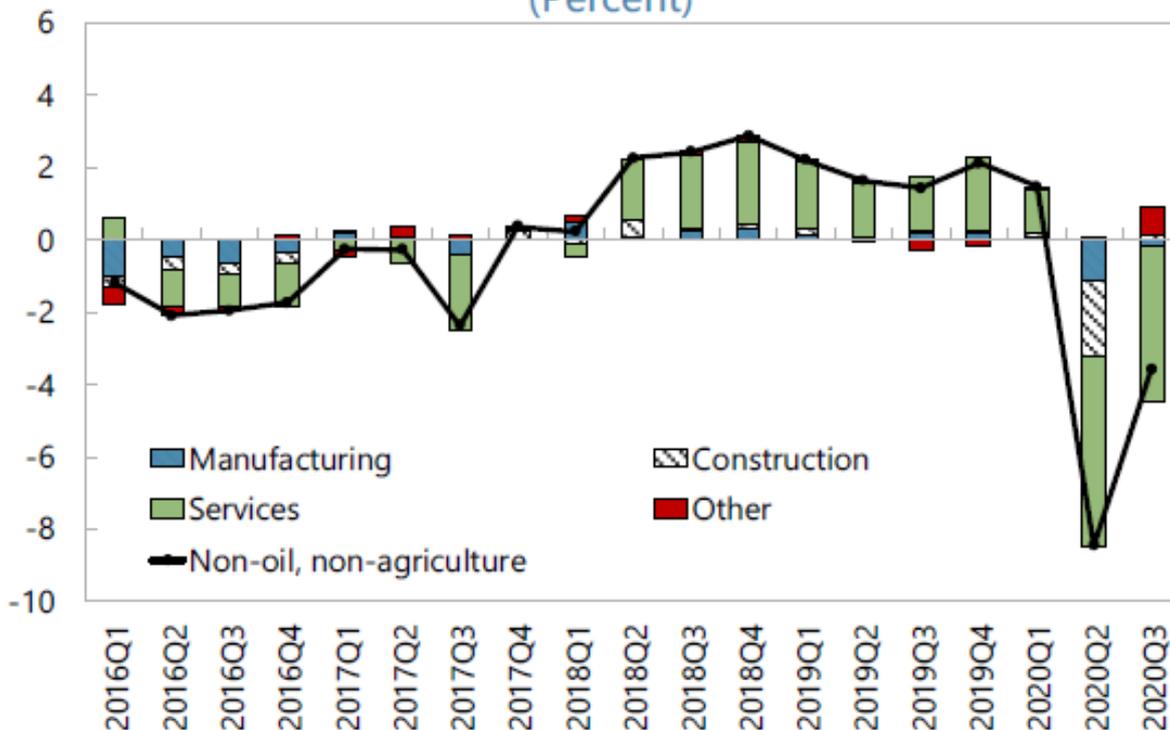
Nigeria slipped into technical recession in Q3 2020, with a reduction in GDP of 6.1% in Q2 and a further 3.6% in Q3. Not a surprise, although a modest recovery in Q4 of 0.1% was unexpected (against an anticipated further decline of just under 2%). Despite that, annual GDP contraction was 1.9% in 2020, compared to a 2.3% growth in 2019.¹

¹ National Bureau of Statistics

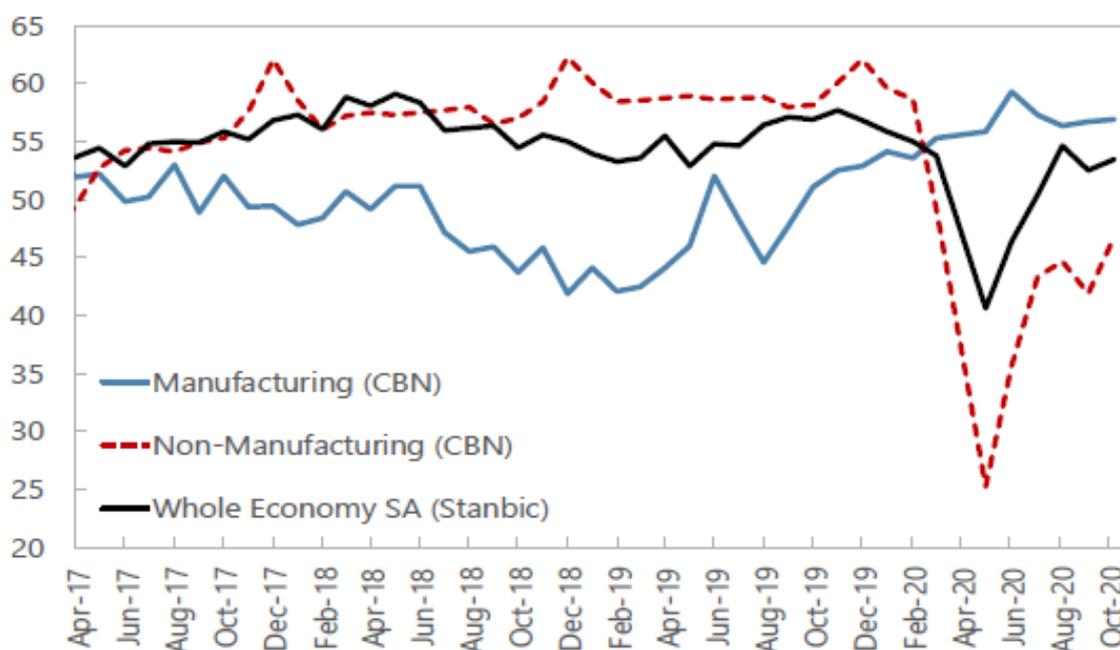


Recovery has not been linear across sectors, with the services sector particularly struggling to recover; reflected also in the relative slow recovery of the non-manufacturing purchasing managers index (PMI, a key economic confidence indicator) lagging below 50% (the threshold which reflects anticipation of economic growth).

Non-oil Non-agriculture Growth and Decomposition (Percent)



Purchasing Manager Index



Q1 2021 GDP figures continue to show a progressive recovery, with the economy now marginally (0.51%) larger compared to the same period in 2020. Agriculture and manufacturing have continued to lead the recovery, with services still lagging. Agriculture grew 2%, Manufacturing 3%. Within services, banking and finance was flat, wholesale and retail trade -2%, accommodation and food -5%, telecoms +8%.

1.2 Employment

While unemployment has been steadily rising over recent years, reaching 10.8% in Q3 2018 (% labour force participation without any employment), rates significantly increased to 17.5% by Q4 2020. Underemployment (less than 40 hours/week), always a significant challenge in Nigeria, rose to 22.8% in Q4 2020 (from 20.1% in Q3 2018); and that excluding very part time work (1-19 hours/week). Unemployment rates are particularly evident in the higher educated population, less in lower level of education, possibly reflective of the relative struggle in the services sector and in reduced opportunity to economically migrate. Youth are disproportionately impacted, females relatively more than males and urban more than rural.

The World Bank's RISING TO THE CHALLENGE: NIGERIA'S COVID RESPONSE, reports that "employment contracted sharply, and job turnover increased significantly in April, but both appear to have stabilized by the end of August. Even though many Nigerians returned to work after the easing of strict lockdown measures in the early phase of the COVID-19 crisis, most households remain in an economically precarious situation. More than two in three households report lower incomes now than one year ago. Nigerian households are facing increased economic precarity: unemployed workers have migrated back to the low productivity agricultural sector, and reports of food insecurity have increased substantially

from the previous year. Additionally, it appears that women's working situation has been disrupted more than men's as the crisis has evolved."²

² RISING TO THE CHALLENGE: NIGERIA'S COVID RESPONSE, World Bank, December 2020

National Bureau of Statistics

	Labour force population	Work 40 Hrs+	Work 20 -39 Hrs	Work 1 -19 Hrs	Work 0 Hr	Total Unemployed	Unemployment rates			Under employment rate
		Fully Employed	Under-employed	Unemployed	Unemployed		OLD Nigeria	NEW Nigeria	Intl.	
Total	69,675,468	30,572,440	15,915,639	11,027,211	12,160,178	23,187,389	56.1	33.3	17.5	22.8
Educational										
None	20,652,597	8,414,119	6,378,368	3,839,639	2,020,472	5,860,110	59.3	28.4	9.8	30.9
First School Leaving Certificate	9,240,842	4,191,875	2,197,042	1,642,647	1,209,280	2,851,926	54.6	30.9	13.1	23.8
Middle School Leaving Certificate	326,025	162,474	82,671	49,129	31,750	80,880	50.2	24.8	9.7	25.4
Vocational/Commercial	233,535	96,993	66,592	46,598	23,352	69,950	58.5	30.0	10.0	28.5
Junior Secondary School Certificate	3,351,293	1,477,931	719,264	529,298	624,799	1,154,097	55.9	34.4	18.6	21.5
Senior Secondary School Certificate	22,031,170	9,686,538	4,165,532	3,140,116	5,038,984	8,179,100	56.0	37.1	22.9	18.9
A' levels	748,228	272,915	95,978	169,570	209,766	379,336	63.5	50.7	28.0	12.8
NCE/OND/Nursing	5,779,243	2,766,061	1,163,199	679,592	1,170,392	1,849,984	52.1	32.0	20.3	20.1
BA/BSc/HND	5,940,546	2,817,286	741,208	672,334	1,709,718	2,382,052	52.6	40.1	28.8	12.5
Tech/Prof	187,033	82,660	51,537	25,075	27,760	52,835	55.8	28.2	14.8	27.6
Masters	349,306	189,592	62,518	56,748	40,448	97,196	45.7	27.8	11.6	17.9
Doctorate	73,859	46,054	15,323	12,483	-	12,483	37.6	16.9	0.0	20.7
others (specify)	761,792	367,942	176,408	163,985	53,456	217,441	51.7	28.5	7.0	23.2
Age-Group										
15-24	9,853,103	2,644,138	1,949,921	1,466,194	3,792,850	5,259,044	73.2	53.4	38.5	19.8

	Labour force population	Work 40 Hrs+	Work 20 -39 Hrs	Work 1 -19 Hrs	Work 0 Hr	Total Unemployed	Unemployment rates			Under employment rate
		Fully Employed	Under-employed	Unemployed	Unemployed		OLD Nigeria	NEW Nigeria	Intl.	
25-34	20,091,695	8,285,527	4,342,080	2,852,745	4,611,344	7,464,089	58.8	37.2	23.0	21.6
35-44	19,268,957	9,490,477	4,546,061	2,934,061	2,298,359	5,232,420	50.7	27.2	11.9	23.6
45-54	13,302,064	6,682,000	3,240,239	2,295,907	1,083,918	3,379,825	49.8	25.4	8.1	24.4
55-64	7,159,648	3,470,299	1,837,338	1,478,305	373,707	1,852,012	51.5	25.9	5.2	25.7
Gender										
Male	39,523,050	18,333,745	8,612,770	6,349,980	6,226,555	12,576,536	53.6	31.8	15.8	21.8
Female	30,152,418	12,238,695	7,302,869	4,677,231	5,933,623	10,610,854	59.4	35.2	19.7	24.2
Place of Residence										
Urban	26,459,732	13,893,541	4,280,005	3,216,856	5,069,331	8,286,186	47.5	31.3	19.2	16.2
Rural	43,215,736	16,678,900	11,635,634	7,810,356	7,090,847	14,901,203	61.4	34.5	16.4	26.9

Source: African Economic Outlook 2021, African Development Bank Group

A 2018 ILO estimate shows that 93% of all employment in Nigeria is informal, with 95% of women working in the informal sector as compared to 90% of men. Roughly 50% of informal workers are independent workers, mainly own account workers and 50% are employees, meaning they work for an employer, mostly in small or medium informal enterprises. The overwhelming majority of informal economy workers work in vulnerable working conditions, with little to no access to occupational safety and health or social protection and are dependent on a daily income to feed their families. The COVID-19 crisis has further aggravated their situation with ongoing restrictions on movements between states and within state borders and the inability to engage (safely) in economic activities. There is growing evidence on the economic losses faced by workers and businesses due to reduced demand, lack of access to markets, and the loss of mobility of people and goods. In Lagos and Abuja, this has already led to reports of increased criminality, with people taking to desperate measures to survive. Due to their over-representation in the informal sector and vulnerable employment, women and youth tend to be worst affected by the immediate and short-term adverse livelihood and economic consequences.⁴

1.4 Economic Outlook

The African Development Bank has a relatively improved, although conditional, outlook for 2021 and 2022, suggesting an economic growth of 1.5% in 2021 and 2.9% in 2022. It references stimuli included in the Finance Act 2020 could boost non-oil revenues, as well as improved inputs supply through reopening of borders. Downside risks include reduced fiscal space (reduced revenues and Foreign Direct Investment), flooding and increased insecurity which could impact agricultural production. Foreign exchange depletion in managing through 2020 could, the report suggests, risk exchange rate depreciation. A further resurgence of COVID-19 could “exacerbate these risks”.⁵

1.5 Economic stimuli

KPMG have provided a very helpful summary of the Nigeria Economic Sustainability Plan (NESP), approved by the Federal Executive Council (FEC) on June 24, 2020;⁶

Recovery Plan Overview

- **Recovery plan:** Nigeria Economic Sustainability Plan (Bouncing Back)
- **Budget:** ₦2.3 Trillion
- **Announcement:** Approved by the Federal Executive Council on 24 June 2020
- **Main orientations:** Fiscal & Monetary, Real Sector and Implementation.

⁴ A Rapid Diagnostics Assessing the Impact of COVID-19 on enterprises and workers in the informal Economy in Nigeria, ILO 2020

⁵ African Economic Outlook 2021, African Development Bank Group

⁶ Government and institution measures in response to COVID-19, KPMG, 2020

Main measures

General Objectives

- Prevent business collapse and ensure liquidity
- Use of labour-intensive methods to retain or create jobs in key economic areas
- Undertake jobs that enhance growth and create infrastructural investments in roads, bridges, solar power, and communications technologies
- Promote manufacturing and local productions at all levels and curb unnecessary demand for foreign exchange to stem the pressure on exchange rate
- Protect the very poor and most vulnerable through pro-poor spending

Key measures – Real sector

- ~~₦~~634.98bn for the creation of 5 million jobs in the agricultural sector while boosting agricultural production and guaranteeing food security.
- ~~₦~~317.29bn for mass housing strategy divided into two tracks. Track 1 will involve building of 300,000 homes across the country while Track 2 will leverage existing institutions to build additional 25,515 affordable homes across the country in 12 months.
- ~~₦~~240bn to create 250,000 jobs in the energy sector while providing solar power to 5 million households by 2023.
- ~~₦~~50bn for direct labour in National Infrastructure Projects to create jobs for youths in relevant priority sectors.
- Launch of programme to create jobs in digital outsourcing.
- ~~₦~~90bn for the launch of a national programme to promote domestic use of CNG and support the creation of 1 million jobs.
- ~~₦~~23.4bn to support the creation of 1 million jobs through the conversion of 30 million homes from dirty fuels (kerosene, charcoal, and diesel) to LPG and achieve emissions reduction in greenhouse gases while also applying LPG in other sectors such as agriculture, power generation, transport, industry, and technology. ~~₦~~15bn to sustain 300,000 jobs in 100,000 MSMEs by guaranteeing off-take of identified priority products.
- ~~₦~~260bn to establish the SME Survival Fund to sustain at least 500,000 jobs in 50,000 SMEs for 3 months.
- ~~₦~~350bn to support the creation of jobs in priority sectors using BOI, NEXIM and other national development banks as fulcrums.
- ~~₦~~60bn to create 296,000 jobs in the construction and rehabilitation of roads in the 6 geopolitical zones of the country through the use of local resources.
- ~~₦~~198.94bn to develop a robust health system with the capacity to withstand shocks.
- ~~₦~~10.29bn to fast-track the implementation of the National Water Supply, Sanitation and Hygiene programme.

- ~~₦~~87.06bn to increase support to vulnerable individuals and households in the context of COVID-19.
- ~~₦~~27bn to save existing aviation industry organisations and jobs, through a targeted stimulus package and fast track the establishment of a private sector driven national carrier.
- ~~₦~~144.12bn for the establishment of an economically viable Science and Innovation ecosystem in Nigeria.
- ~~₦~~2.39bn to strengthen the national capacity to manage immigration, correctional facilities, and public safety post-COVID-19.
- ~~₦~~6bn to establish a programme to organise artisanal miners and develop the mineral value-chain in 6 geo-political zones.
- ~~₦~~15bn to fast-track the implementation of the National Digital Switch Over Programme.

The Brookings Institution⁷ is less positive on the relevance of the stimulus package for those most in need, citing:

- The proposed law aims to provide 50 percent tax rebates to businesses that are registered under the Companies and Allied Matters Act so they can use this saving to continue employing their current workers. However, while the bill focuses on providing relief to formal sector businesses, 65 percent of Nigeria's total GDP comes from the informal sector, which also employs more than 90 percent of the workforce, and these workers need support to survive. Many businesses in the informal sector are unregistered so it will be difficult for them to get these benefits. These businesses are often supported by microfinance facilities. For the government to help, it will have to use small interest-free loans or small grants to these enterprises through microfinance facilities and other community-based channels. This will be even more important now that the country is considering a second wave of targeted lockdown.
- Cash transfers. On April 1, 2020, the government announced that it will make transfers of 20,000 Naira (\$52) to poor and vulnerable households registered in the National Social Register (NSR). Currently, the NSR has only 2.6 million households (about 11 million people) registered on its platform. The government hopes to increase this to 3.6 million households during the COVID-19 crisis. However, 87 million Nigerians live on less than \$1.90 a day. Therefore, the cash payments by the federal government will reach only a fraction of poor. Besides, Nigeria does not have a robust national information management system, making electronic payments difficult. This has resulted in many people in the NSR not receiving the money promised by the government. An immediate solution the government can explore is to provide prepaid debit cards to the poor. This can be done at the community/ward level to ensure that the cards reach the poorest. Of course, this is a stopgap solution, and more effective measures like direct bank transfers need be strengthened. But people need a Bank Verification Number (BVN) to open a bank account and obtaining a BVN requires a valid national ID or international passport,

⁷ How well has Nigeria responded to COVID-19? Brookings, 2020

which many Nigerians do not have. Currently, only about 40 percent of the Nigerian population have bank accounts.

- Central Bank of Nigeria stimulus package. The CBN's stimulus package offers a credit of 3 million Naira to poor families impacted by COVID-19. However, the loan requires collateral and is not interest-free. The loans could be made available free of collateral to poor households or just require signed guarantees by community leaders. The loans should be available at a low interest rate with long moratorium and repayment period. Moreover, not many poor households and businesses in the informal sector know about the available economic packages and policies implemented by the government.
- Food assistance. After President Buhari imposed the lockdown in Lagos, FCT, and Ogun states on April 1, 2020, the Federal Ministry of Humanitarian Affairs Disaster Management and Social Development announced that it will provide food rations to vulnerable households in these states. The extended lockdown has led to people facing hunger in many regions of the country. The government has not been able to provide food support to everyone who needs it, as the distribution system is marred by corruption and opaque accountability. The government has to improve transparency and accountability in the food ration distribution system. It should also make sure that middlemen do not have excessive control. The government could use the system of house marking used in the polio campaign (in which houses visited by vaccinators are marked) during food distribution, i.e., putting a mark on those houses where food has been distributed. The Ward Development Committees can also be used for distributing the food rations. The government could also better use technology to plug leakages, track rations, and reduce corruption.

Finally, worthy of note in the stimulus packages is the **Special Public Works (SPW) programme**⁸. This 52bn naira (\$136m) programme targets low-skilled workers, offering three-month job placements to up to 774,000. Jobs included are predominantly manual; drainage clearance, irrigation canal clearance, rural road maintenance, street cleaning, traffic control, public institution cleaning and did have delays from its October 2020 launch (finally launched 2021). Remuneration is 20,000 naira (\$53) a month, less than the minimum wage of 30,000 naira but significant in a country with very high levels of youth unemployment.

2. Policies and Regulatory Framework

On January 23rd, 2019, the Federal government of Nigeria signed the Discrimination Against People with Disability (Prohibition) Act. This is the localisation of the UNCRPD and is the main policy change since our first Labour Market Assessment in 2019.

While the act requires public institutions to reserve 5% of their workforce for people with disability, it also makes provision for the government to setup a National Commission for Persons with Disabilities (NCPD). The Commission is expected to serve as a regulatory institution, implementing the provisions of the Act as well as enforcing them.

⁸ <https://specialpublicworks.gov.ng/>

Through the Inclusion Works programme, Sightsavers has worked with the Federal Ministry of Humanitarian Affairs, Disaster Management and Social Development (FMHADMSD) and the Federal Ministry of Women Affairs to establish the Commission. In August 2020, the President appointed seven people with disabilities as board members and Executive Secretary of the commission. Since then, Inclusion Works has been supporting the operationalising process, specifically to identify key priorities for 2021.

Another important influence by the Inclusion Works has been with the Lagos state government. In 2019 the programme impressed on the government to initiate an Access to Work mechanism, similar to that in the UK. In 2021, this potentially comes to a fruition with conversations now underway to allocate a sizeable percentage of the disability trust fund for this, with an invitation to other development partners and bilateral agencies to also contribute. A public-private sector committee would be established to manage the fund, and grow it, and this provides a breakthrough mechanism for jobseekers and employers to access a fund which supports accommodation costs which employers could not reasonably afford alone and gets people with disabilities into work.

3. Demand for Skills

This section has taken views from a number of employers across business sectors, to sense their experiences over the last two years, most notably those of the last year during the COVID-19 pandemic. Conversations have naturally led to then look forward at the coming years, their confidence, and expectations during the post-pandemic economic cycle and how that has changed inclusive employment aspirations, as well as ways of working and skillsets they will tend to demand.

3.1 Human Resource (HR) Practitioners

The Chartered Institute of Personnel Management (CIPM) identifies both power supply and digital acumen as limiting Nigeria's economy over the COVID-19 period, and potentially the recovery from it. CIPM does recognise the efficiency of Nigeria's education system in switching to virtual delivery over the past year but does identify that curriculum needs modernising if education is to effectively support that recovery. The worsening security context is affecting foreign direct investment, while corruption and inflation are also limiting factors in the recovery of the economy. CIPM does project the economy will recover, but the speed (trajectory) of that recovery will be slower than others are predicting. While manufacturing is recovering, CIPM points to the high unemployment rates at the end of 2020, as we have also in Section 1, and that this reflects the struggle of the service sector to recovery. Service sector companies make up the majority of CIPM's membership.

CIPM see considerable change in members' ways of working over the past 12-18 months, prioritising employee wellbeing, and increasingly introducing flexible working policies. Digitalisation is increasingly making many routine repetitive tasks and roles redundant, while significantly changing skillsets and tools proficiency in others. Interpersonal skills are becoming increasingly important in the current (and future) ways of working. Empathy, an ability to manage people remotely, communication skills (specifically risk communication),

and resilience were all mentioned. Specific to HR practitioners, business intelligence is increasingly important.

CIPM sees the Disability Act (2018), as well as the recently formed Nigeria Business and Disability Network, as drivers for increased diversity and inclusion, driving companies beyond a CSR/philanthropic (charitable) approaches to ones which embed inclusion into the workplace, not least because of the punitive measures within the Disability Act for non-compliance.⁹ Diversity and inclusion is increasingly seen as a competitive imperative, and CIPM has now included disability inclusion within its performance measures for HR practitioners. The Institute would like to see more government recognition (certification) to incentivise inclusion, rather than rely only of punitive measures.

CIPM encourages programmes like Inclusion Works to introduce an inclusion reporting framework to support companies in along their inclusion journey. Interestingly, we've had similar requests from Kenya over the past two years and more recently have started a conversation with the ILO's Global Business and Disability Network on a benchmarking adaptation of its self-assessment framework. Finally, CIPM recognises that scaling HR practitioner mentoring is key to transitioning more people with disabilities into formal employment. It's a "game changer", with CIPM working with Inclusion Works over the past two years in pioneering this with significant success.

3.2 Financial Services

Consistent with CIPM, First City Monument Bank also projects that economic recovery will be slower than others are predicting, citing infrastructure, as well as existing systems as limiting factors. The Bank sees the financial sector as managing reasonably well, but with loan defaults as a material risk in this period. Repayment moratoriums have somewhat mitigated that risk, with the Bank working with financial regulators to embed this into sector wide policy. The Bank also mitigated investment risk during the economic downturn, targeting technology and alternative (solar) energy, and realising significant returns on those investments.

Over the past year-and-a-half, many (60%) of the Bank's staff worked remotely from offices and already positioned the organisation well for working through the pandemic. Digitalisation of products and processes has accelerated, as has the recruitment requirement of digital skills (including a practical problem-solving exercise within their recruitment process). In addition to digital skills, the Bank continues to prioritise interpersonal skills in recruitment, specifically mentioning communication skills, emotional intelligence, critical thinking, problem solving skills, and cultural intelligence.

The Bank does recognise that it is lagging on disability inclusive employment, and that it needs to accelerate. The Central Bank is now requiring banks to include inclusion in sustainability reporting, and First City Monument Bank recognises that this needs to be embedded in their sustainability programming.

⁹ The Persons with Disability (Prohibition) Act 2018 includes punitive measures on inaccessibility of the built environment as well as discrimination against persons with disabilities and set a 5% quota although only for public organisations.

Finally, the Bank asks for programmes like Inclusion Works to create libraries (databases) of more easily accessible inclusion resources which can support organisational diversity and inclusion initiatives. Also training materials which can be included in induction and existing staff training programmes.

3.3 ICT & Mobile Telecommunications

Airtel again cautions that economic recovery will take time, citing continued inflation and foreign exchange volatility as limiting factors. Airtel did see understandable deprioritising of data package purchases during the downturn, with voice calls anyway being more central to telecoms business models in Nigeria (limited access to PCs, laptops, and smart devices, as well as literacy and demographics). Airtel is not surprised that manufacturing has recovered faster than the service sector(s) in Nigeria, with the latter much more dependent on social interaction (telecommunications, hospitality, retail). Limited technology / digital penetration is also a significant limiting factor (online versus in-store retail).

Conversely, Airtel does see the future of work being much more virtual, with the Company already considering reducing its office footprint. Interestingly, the Company is already considering how savings in utility and telecoms costs associated to this can be shared with staff working remotely (from home). Airtel has recognised that working from home has had some negative productivity impact and will be looking at more specific soft as well as digital skills moving forward; self-motivation, employees can supervise themselves, be self-driven, tech savvy, output driven, conscious on time management - including work/life balance. More remote working is seen as a potential accelerator for diversity and inclusion, specifically disability and with a greater focus on outputs in performance management. That said, programmes like Inclusion Works must focus on employment readiness, as companies will rarely invest in this for new hires.

3.4 Utilities

Consistent with all the above, Ikeja Electric projects that the economic recovery will be slow, citing inflation and reduced purchasing power, increasing unemployment and limited effectiveness of government stimulus packages. Ikeja has seen energy consumption increasing during the pandemic, but with customers predominantly post-paid the Company is also seeing significant increases in bill default and debt. Government caps on energy pricing constrained business models in the sector. The impacts on oil and gas (cf. Section 1) had implications on exchange rates, which in turn have profitability impacts on investments in the sector which are largely US dollar based. Overall, this has led to power generators limiting supplies to distributor companies like Ikeja (to less than half of consumer demand).

Distanced working will be the new normal for administrative staff, with Ikeja also mentioning (like Airtel) that performance will be more measured against outputs delivered not time spent. Skills such as an ability to work without supervision, ability to use virtual tools for collaboration, use of cloud base systems now increase in priority.

Ikeja sees that embracing greater disability inclusion becomes an imperative, and that not doing so will cost the Company. Distanced working can help in this regard but needs investment in individual and organisational capacity. The Company (like Airtel) sees bias at recruitment as a limiting factor for inclusion, but also that there needs to be investments in

managers' capacity to know how to manage inclusively. Our interviewee also suggests that programmes like Inclusion Works support people with disabilities in skills development in HR competences, communication competences, procurement, and data analytics.

3.5 Consumer Goods

Unilever Nigeria's representatives' perspective is that the Nigerian economy will likely have more of a U shape; the steep decline already experienced, a prolonged period of recessed economic activity, followed by a period of relatively rapid recovery. The recovery could show itself toward the end of 2021 or early 2022, with the trajectory of that upswing somewhat dependent on oil and gas.

General perceptions are that COVID-19 has increased operating costs for businesses (existing office-based assets depreciating but not fully functioning, incremental costs of supporting virtual working). Unilever Nigeria's experience is the opposite and has in fact realised an increased profitability. That said, there has had to be additional investments in technology and new ways of working with customers/clients, along with similar in mental wellbeing.

While recognising that the manufacturing sector is recovering faster (in general) than services, Unilever does challenge that this is not linear across the sector or even across its own business. Products which are consumed daily have fared relatively well. Beauty and personal care products less so. So, a mixed bag in manufacturing.

Distanced working is in place now and hybrid ways of working at Unilever will likely remain long term. This has also led to innovations in international assignments, which can also now be delivered virtually, albeit it with necessarily adaptations to expatriate management. Unilever is currently piloting this "virtual assignment" approach. The future of work will clearly need more digital skills (an imperative), including project management tools, business canvas for innovation and design, data analytics etc. Soft skills will include adaptability, flexibility, and mental agility.

The Company's diversion and inclusion objectives remain constant and guided by its commitments to the SDGs. That continues to include its commitment to a 5% representation of disability across its workforce by 2025, with the Company beginning to include progress towards that as part of its sustainability/community reporting.

Unilever's advice to programmes like Inclusion Works, and to the business community, is one of increased collaboration; investing in skills sets of jobseekers with disabilities, increasing internship and work experience opportunities which will transition into full time employment. It calls for (more) practical tools, including practical advice on reasonable accommodation and advice on what is reasonable. Also, Unilever advise to start recognising changes in disability confidence through mechanisms like CIPM awards, but also in influencing Government in terms of incentive mechanisms and financial support for workplace adjustments – particularly for small and medium sized enterprises (SMEs).

4. Supply of Skills

4.1 Jobseekers

In Nigeria, as in the 2019 labour market assessment, we employed a World Café approach (as a catalyst to discussion) to gather changed employment aspirations from people with disabilities, the barriers which stop them realising those aspirations, the vulnerabilities they face in employment, and how they measure the success of their employment.

The group felt nothing had materially changed over the past two years in terms of their employment aspirations. These were still very broad in terms of waged employment, from architect, to diplomat, social worker, fish farmer, banker, and baker. There was an increased emphasis on job creation - of aspirations to be job creators for (and to share wealth creation with) other people with disabilities and other vulnerable groups.

In terms of barriers to realizing those aspirations, again the group felt these remain constant to two years ago. Societal attitudes continue to be discouraging, with perceptions of low capabilities. Employers continue to consciously discriminate against people with disabilities in recruitment, irrespective of capabilities. That people with disabilities were left with a feeling of “begging” when in search of employment.

Infrastructure and building accessibility remain a significant barrier (particularly for physical impairments) as does job portal/web accessibility (for visual impairments), lack of sign language interpretation as a significant communications barrier (for hearing impairments), and a reluctance from employers to provide technology accommodations to perform effectively within the workplace.

Not surprisingly, access to finance continues to be seen as a major barrier for potential job creators (entrepreneurs).

Overarching all of this, is a feeling that not all employers are recognising/implementing the Nigerian Disability Act and are reluctant to employ people with disabilities because of the perception of cost. Furthermore, employers are not likely to be recruiting inclusively now because of the economic pressures from the pandemic. So clearly quite a gap between the inclusive employment aspirations shared by employers earlier, and the barriers that people with disabilities continue to report here.

Again, vulnerabilities have not changed over the past two years- in terms of their nature but were felt to have increased in the likelihood of people with disabilities facing them in the workplace. Abuse (sexual, verbal, physical), exposure to danger in emergencies (fire, evacuation) and exposure to infection from necessarily reduced physical distancing and inaccessible toilets were all mentioned specific vulnerabilities in employment; women with intellectual disabilities felt to be most at risk from sexual abuse and rape in the workplace.

In terms of measuring success, the group identified taking care of basic needs, of promotion and career progression, of being acknowledged, and of gaining respect and acceptance from employers for their ability to do the job. For those with more entrepreneurial aspirations, measures of success included customer/client demand for their products and services. For

those with intellectual disabilities there was a clear voicing that success to them would be measured in transitioning into their own business (painters, fish farmers, bakers).

4.2 Leaders of Organisations of Persons with Disabilities

A second World Café with OPD leaders was very consistent. They perceived their members' aspirations as realising career potential, good salaries, conditions of employment and standards of living. Professions were again broad and included teaching, film making, media practitioner, self-employment. An important aspiration was acceptance (cf. jobseekers' measures of success) by colleagues and equal treatment and participation. Again, these were seen not to have changed over the past two years.

Barriers were in many ways similar, but also interestingly in some ways different. Similarities included communication barriers (sign language interpreters in the workplace, scarcity of tactile interpreters for the deaf-blind), institutional and cultural (entrenched discriminatory practices), attitudinal, financial (access to finance for potential entrepreneurs), infrastructural (particularly public infrastructure), lack of reasonable accommodation by employers. Again, weak implementation of the Disability Act was mentioned, as was the loss of confidence in jobseekers as a result of stigmatisation. What was different, was the mention of the lack of skilled labour with the community of people with disabilities (so more of a hard skills barrier) and that employers lack knowledge on inclusion. While these barriers have not materially changed in the past two years, despite the passing of the Disability Act, and this is a concern for the OPD leaders.

Vulnerabilities in employment were again consistent with jobseekers; risk of rape and sexual assault, risks in emergencies (evacuations) and particular risks for women in terms of verbal abuse. OPD leaders also agreed that these vulnerabilities have increased over the past two years.

Measures of success were largely consistent, accessing finance and optimizing profit for the self-employed, basic needs and standard of living, decent working relationships with colleagues, self-confidence and independence, career progression (although surprisingly this was specific to civil service employment).

5. Supporting Functions

5.1 Organisations of Persons with Disabilities

Following the World Café on aspirations, barriers, vulnerabilities, and measures of success in employment, we asked OPD leaders a number of questions on changes in context over the past two years (since the original labour market assessment in 2019).

- What are OPDs seeing as change over the past two years?
- Do OPDs see labour markets as more inclusive, or less?
- What more needs to change and how?

- What are OPDs expectations of their role now within the labour market system?

The leaders felt there had been an increase in the flow, sensitisation, and dissemination of disability related information over the past two years. They felt that the disability movement in Nigeria is growing fast and gathering momentum and had realised the signing of Disability Act (the Discrimination Against Persons with Disabilities (Prohibition) Act) in 2019, following years of relentless advocacy. This has and is creating more awareness on disability rights. The Act has also allocated 5% quota for the employment of persons with disabilities. Efforts to place disability rights to the fore resulted in the establishing of a national commission, which is charged with ensuring the inclusion and welfare of persons with disabilities as enshrined in the Act. There has been increased advocacy to employers of labour, however OPDs' capacity to navigate issues in the employment sector is still relatively low. The COVID-19 response plan provided access to social intervention funds and access to credit facilities for micro, small and mediums sized enterprises of people with disabilities.

The leaders see the inclusivity of the labour market as still evolving. However, attitudinal barriers still exist and there is a strong need to advocate and engage the Nigeria labour congress on the Disability Act.

The group felt OPDs are meant to supplement and not replace Government's responsibilities. They should be seen as partners and not opposition parties to the Government. They felt it important that a collaborative rather than confrontational approach to advocacy should be followed. In the Disability Act, the National Orientation Agency and Ministry of Information were noted as the Government agents tasked with awareness raising and as such OPDs should leverage on this to have these agencies create awareness of disability inclusion. Critical to this is the capacity building of ministries, departments, and agencies of Government on the Disability Act and on inclusion in employment.

The leaders felt that OPDs should, and are expected to, play a key role in advocacy within the labour market system for people with disabilities. Technical knowledge is required for OPDs to advocate on issues of employment. This can be acquired through knowledge transfer. measures to enhance capacity can also include having OPDs take advantage of internship opportunities that organizations offer, as well as having external consultants build the capacity of OPDs.

5.2 Education institutions

A conversation with the University of Abuja brings an important view that the skills needed to be successful in today's, and a post-COVID-19, workforce will be substantially different to those of the past two years. Data skills will be one of the key drivers for future growth and are now currently in high demand by many organisations. Medical skills are also, understandably, in greater demand in healthcare and nursing. Thirdly, emotional intelligence ("the ability to understand the way people feel and react and to use this skill to make good judgments and to avoid or solve problems"¹⁰) has become key in recruitment, including at the university, for effective working in collaborative environments.

¹⁰ <https://dictionary.cambridge.org/dictionary/english/emotional-intelligence>

The university has now set up a committee to proactively respond and adapt curricula to changes in skills demanded by employers.

The interviewee felt that there has not been material change in disability inclusion in employment over the past two years, as there's limited (no) awareness about the implementation of the Disability Act.

5.3 Trade unions

The Nigeria Labour Congress (NLC) provided a rare but important insight into trade union promotion and protection of the rights of people with disabilities. NLC lacks disability confidence, reporting that awareness of the Disability Act is low among it and its members. It had received offers of training from the Albino Foundation – a partner of Inclusion Works, but has until now been diverted by other priorities, compounded by perceived poor experiences of working with disability organisations in the past. That said, the interviewee does see opportunity for collaboration between itself and OPDs.

Prior experience of legislative change suggests, to NLC, that the main challenge will always be implementation. It suggested that the first decade of the Disability Act will need to be one of advocacy. NLC's expectation of compliance is low, with its perception that companies will likely factor in fines into costs of operation, until at least a reliable supply of appropriately skilled people with disabilities is realised.

Finally, a need to gather disability disaggregated data in public and private sector employment, as a primary advocacy source to release the 5% legislation.

5.4 Ministries, Departments and Agencies of Government

Inputs from the Federal Ministry of Humanitarian Affairs, Disaster Management and Social Development reflect the potential for influencing not only policy but the implementation of policy. The ministry mentioned the federal government's commitment to include people with disabilities in all interventions, specific to that of employment, not least the ongoing N-power and N-teach social protection programmes, public works scheme and the likes. The N-power programme is part of the social protection programme but dedicated to employment of youth in Nigeria. The Minister committed to a 10% reservation after Inclusion Works' (Sightsavers) wrote to her. The ministry has started to send inclusion data to the Disability Commission for verification and is starting to do similar for other programmes like cash transfers. There was also mention of the Ministry of Youth's 1-2 years employment programme, and specifically the Chartered Institute of Personnel Managers' mentors influencing on disability representation.

The ministry has now ensured the Disability Commission, established in part after Inclusion Works influencing, has a separate budget for implementing its activities. Further gains also in the Minister for Information has ordered the director general of the national broadcasting commission to give all TV stations a period of six months to one year to include sign language in all their news programmes – recognising that this started with the Inclusion Works (Sightsavers) to the Nigeria Television Authority (NTA) in starting this in January 2021.

The Ministry does recognise that Nigeria (here the Central Bank) has not done sufficiently well in mechanisms which specifically support people with disabilities who have lost their employment as a result of COVID-19, including supporting them back into employment or self-employment. It referenced the stimulus packages for SMEs but recognised that these have not made specific inclusion commitments.

The Ministry recognises that public service employment diversity and inclusion commitments through the Federal Character Act do not make mention of disability and encourages Inclusion Works to influence this in the national employment policy and support disability awareness within Ministries, Departments and Agencies. Balancing that we must recognise that the government is already the largest employer of people with disabilities in Nigeria. An area which will need to be prioritised is the professionalism of jobseekers; understanding that prior experience of employing people with disabilities has not been universally positive, and that often inclusion has been more quota compliance than a recognition of equivalent performance potential.

6. Conclusions & Recommendations

What's clear from the 2021 refresh of the baseline 2019 Labour Market Assessment (LMA) is that there has been regulatory change, the Disability Act, and that this is beginning to have a level of awareness among at least national and transnational employers. The Inclusion Works programme has seen such awareness through interactions with those employers. However, jobseeker and OPD leaders do not see that as consistent across the labour market, and people with disabilities continue to face endemic stigma and discrimination in the labour market as well as well increased vulnerabilities in employment, specifically in risks of sexual, verbal, and physical abuse.

Generally, the COVID-19 impacted economy has recovered well to 2019 levels, albeit with the critical-to-employment services sector lagging and still in negative territory. Significantly increased unemployment has particularly disadvantaged youth, particularly young women, and those with higher levels of education (likely linked to the lag in the services sector and constraints on international migration). Underemployment is on the rise, along with a drift to lower paid jobs in the agricultural sector.

The 2019 LMA included a number of specific recommendations, including to

- focus on the inclusion of people with disabilities in education institutions and the inclusiveness of curricula.
- provide technical support to employers and jobseekers.
- focus on ICT (digital) skills and relevant (agricultural) value chains.
- pay particular attention to the barriers of women with disabilities.
- increase the capacity of OPDs, including those representing the Deaf.
- Influencing ministries, departments, and agencies (MDAs) of government of support to employers on reasonable accommodation and the implementation of policy.

- Influence disability data reporting, in particular through employer reporting.

Clearly, the programme has made significant progress in much of this, with a 57% to 43% representation of women to men in transitions to employment, technical support to education institutions on physical as well as curricular accessibility, the inclusion of basic ICT skills in jobseeker training. Further progress has been made in the influencing of MDAs on the implementation of policy, including the formation of a national Commission to implement the Disability Act. In addition, the Lagos state government is now exploring the opportunity to pilot an Access-to-Work mechanism, with mentoring from the UK's Department for Work and Pensions. Equally, the programme's focus on employer disability confidence and agricultural value chains is consistent with the 2019 recommendations.

Those recommendations retain currency in the 2021 LMA refresh, now with an:

1. Increased imperative to focus on youth, digital and interpersonal skills including emotional intelligence.
2. Increased focus on the vulnerabilities of women with disabilities in employment.
3. Influencing of trade unions, and building their capacity, to promote and protect the rights of people with disabilities in employment.
4. Continued imperative to continue to support the development of the Nigeria Business and Disability Network as a key to sustaining the programme's progress.