



KADUNA STATE REPORT

Economic and Political Outlook 2019

2nd Edition

Economic intelligence unit

Developed: November 2018



**KADUNA STATE
PLANNING AND BUDGET
COMMISSION**

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Kaduna, Nigeria

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The Economic Intelligence Unit (EIU)

The Economic Intelligence Unit is a research oriented endeavour with the following core functions:

- i. **Fiscal Monitoring** – This focuses on the underlying real factors impacting both revenue and expenditure. It includes looking at the macroeconomic and mineral sector performance nationally and the macroeconomic performance of the state, and forging linkages with the relevant revenue and expenditure items to provide both a historical and forward looking commentary on performance. This would support both in-year and out-year decision making.
- ii. **Review of Emerging Economic Trends** – Identifying emerging economic and development issues that will be of interest and benefit to the state, from variety of sources including Kaduna State, Federal Government (such as NBS, CBN, NEC and other Federal MDAs), other states, development agencies and the private sector; and advising the Commissioner for Budget and Planning and the State accordingly. This function also involves monitoring the dynamics in the private sector and broader economy of Kaduna State, including identifying technical innovations that might benefit the state, use leading indicators to forecast the future dynamics and advice on policy formulation (and its impact on government).
- iii. **Economic and Fiscal Impact of Policy Pronouncements** – A number of new policy pronouncements have been made both nationally and within Kaduna state. In many cases, the impact (economic and fiscal) of the new pronouncements have not been assessed. The EIU will undertake this analysis both ex-ante (to inform policy, particularly in Kaduna State) and ex-poste.
- iv. **Ad hoc briefing notes, position papers etc. on emerging issues** – The unit is flexible under other ad hoc analysis that will support effective policy formulation, efficient service delivery and good governance in Kaduna State.

BRIEFING SHEET

Political and Economic Outlook

- The political permutation in Kaduna state ahead of the 2019 gubernatorial election took a new dimension when the incumbent governor of the All Progressives Congress (APC) announced his choice of Dr. Hadiza Balarabe. Dr. Balarabe, a Muslim, hails from Sanga local government area of Southern Kaduna, a Christian dominated zone.

The Commissioner Planning and Budget Commission is the first Nigerian to be appointed as a member in the World Bank Advisory Council. The appointment is usually for ministers of national governments that are appointed under the Government category not sub-national/State Commissioners.

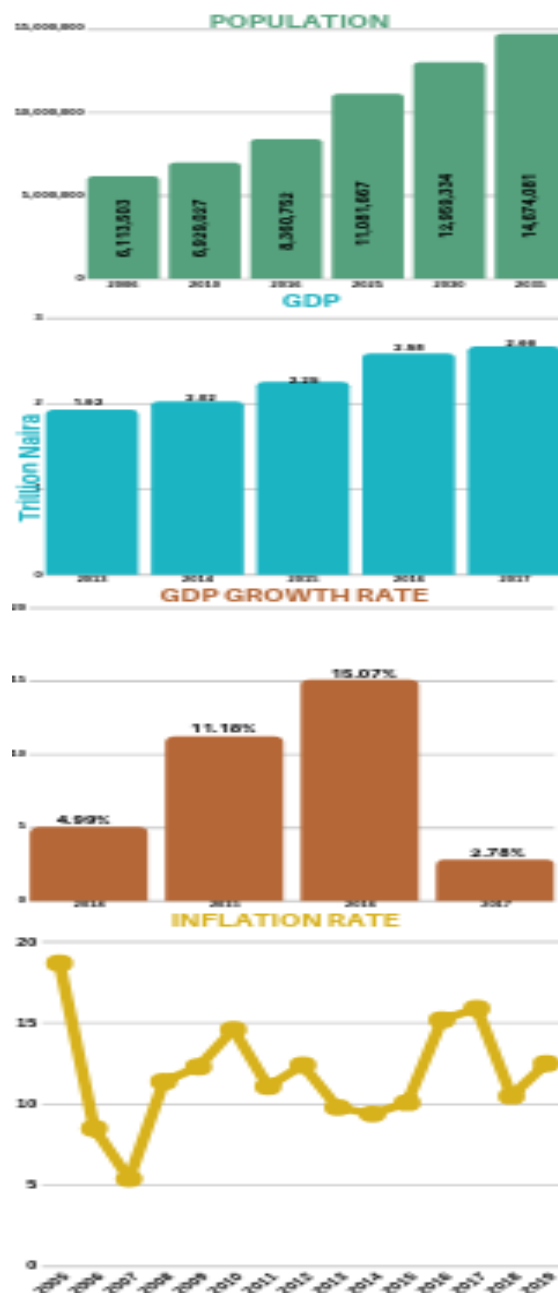
The State's GDP stands at N2.66 trillion in 2017 as against N2.58 trillion in 2016, N2.25 trillion in 2015, N2.02 trillion in 2014 and N1.92 trillion in 2013. The GDP grew by 4.99% in 2014, 11.18% in 2015, 15.07% in 2016 compared to 2.78% growth recorded in 2017 (year on year) in real terms and GDP per capita stands at N316,926.09.

The State introduced free education for girl-child which aims to encourage and increase enrolment of girls-child in the State.

The State adopted the best practice of 26% and 15% allocation to Education and Health respectively in the 2019 Budget.

Kaduna Conducted Local Government Elections using e-voting technology for first of its kind in Nigeria.

Election year comes with lots of political and economic uncertainties. In the first quarter of 2019, the policy makers are expected to be distracted from governance into full politics. Campaigning ahead of the 2019 elections will complicate the situation as politicians focus on shoring up support (and undermining opponents) rather than more prudent policy reforms.



MACRO ECONOMIC INDICATOR

ITEM	2018	2019	2020	2021
National Inflation	11.23%	12.5%	11.2%	9.8%
National Real GDP Growth	2.90%	3%	4%	4.5%
Oil Production Benchmark (MBPD)	1.8	2.1	2.1	2.1
Oil Price Benchmark	\$42.00	\$51.00	\$51.00	\$51.00
NGN:USD Exchange Rate	305	305	305	305
<i>Other Assumptions</i>				
Mineral Ratio	25%	32%	35%	38%



KEY CHANGES IN 2018

- In early 2018, e-release of fund was introduced as part of Public Finance Management.
- The State adopted the best practice of 26% and 15% allocation to Education and Health respectively in the 2019 Budget.
- Introduction of budget preparation in pre-election year before commencement of general elections campaign.
- Kaduna has hosted third editions of KADinvest, its annual investment summit organized by the State's investment promotion agency, KADIPA.
- Engagement of CSOs and Private Sector as a critical component for 2019 MTEF development.
- IBM and Kaduna Govt. signed MoU to train 1 million residents on digital skills.
- Kaduna Conducted LG election using e-voting technology.
- The State domesticated the Child Right Act as another measure aimed at enhancing inclusion in the State.
- Assessment was conducted in 165 of 255 PHC Centres to come up with an effective and efficient financial management system.
- Establishment of the Kaduna State Contributory Health Management Authority (KSCHMA).
- Establishment of climate change Unit in the Ministry of Environment and Natural Resources.
- Introduction of Local Government Fiscal Transparency Accountability and Sustainability program (LFTAS) for LGAs.
- Adoption of Presidential system of government in LGA and linking LGAs plan to budget.
- Inclusion of LG revenue projections in 2019-2021 Kaduna State Medium Term Expenditure Framework (MTEF).
- Implementation of Inclusive Rural Economy(IRE).
- Establishment of Quality Assurance Authority in the Education sector.
- Kaduna State rated first in the ease of doing business in Nigeria by World Bank.
- Free Education for Girl-Child was introduced in the State.

Major risks to our forecast

Scenarios, Q1 2019	Probability	Impact
Kaduna posts negative real GDP growth	Low	Medium
Gov el-Rufa'i wins Governorship election	High	High
Muhammadu Buhari loses the Presidential Election	Low	High
Crisis erupts in Kaduna	High	High
The Governor's arch rivals win Senatorial seats in general elections	Medium	High

Note: Scenarios and their products are as a result of probability

Source: Kaduna Economic Intelligence Unit.

OUTLOOK FOR 2019-22

POLITICAL STABILITY

Election year comes with lots of political and economic uncertainties. In the first quarter of 2019, the policy makers are expected to be distracted from governance into full politics. Campaigning ahead of the 2019 elections will complicate the situation as politicians focus on shoring up support (and undermining opponents) rather than more prudent policy reforms. Nigeria's leadership will struggle to deal with a range of challenges to political and economic stability. Economic growth will be constrained by the weak policy environment and dire infrastructure provision. Foreign Investments as well as Local Investments are likely to stay on the side-lines until the dust settles. The rise in political spending may trigger inflation. The sample size is too small to draw reliable inferences on the effect of elections on GDP growth, but the trend is mixed to negative, most likely due to the adverse effect of uncertainty. The prospects for 2020-22 are slightly stronger, with elections out of the way and oil prices strengthening crossing the \$80 mark and bullishly heading towards \$100 per barrel.

Despite the continuous rancour suffered by the former ruling party, the People's Democratic Party (PDP), the Party has somehow found its footing. The party witnessed hitch free primaries across the Country. Flag bearers were elected for various levels of elective positions with differences set to be put aside for the sake of the party. The Party seems to go into the 2019 Elections more united and stronger. The PDP's main rival, The All Progressive Party (APC), the governing party is witnessing serious divisions especially at state level. States like Zamfara, Ogun, Imo, Adamawa, Borno and Kaduna States are suffering internal party frictions and most of the time rancour springing up between National and State's party chapters.

The two foremost parties are fielding Candidates that have gone against each other at various times and levels. The PDP is fielding Atiku Abubakar, a former Vice President from 1999-2007 who has on various occasions gone against the incumbent President and APC's Presidential Candidate, Muhammadu Buhari for the Presidential ticket. The results for the 2007 General Election showed that Umaru Musa



Yar'adua pulled 24,638,063 votes, signifying 69.82% of the total votes, while Muhammadu Buhari of the ANPP and Atiku Abubakar of AC pulled a total of 6,605,299 votes (18.72%) and 2,637,848 votes (7.47%) respectively. Results from the 2014 APC Presidential Primaries shows the incumbent President pulling a total of 3,430 Votes while Atiku came third with a total of 954 Votes.

Records shows that there is no period that the PDP candidate has come out on top of the incumbent President at all levels of their political contests. The political atmosphere has since changed, and the PDP are gifted underserved advantages by the failures of the ruling APC and are likely to capitalise on the growing frustration in the polity, the loss of goodwill, increased poverty, increased unemployment, eroded purchasing power of the general public and insecurity. Nigerians are likely to choose their next President based on merit rather than based on religion, ethnicity or region unlike previous elections for the first time, because both candidates are Fulani, Muslims and Northerners.

Though, many Nigerians feel that the current administration has not met their expectations. The electorate is sufficiently disappointed that voter apathy will be greater in 2019 than in 2015. This is not likely to cost the APC the government its hold on power, the defeat of the presidential incumbent is less likely to happen in 2019.

There is a greater chance of occurrence of election violence in some states. There are important shifts in Nigeria's political and security context since 2015 elections, presently both evolving, and new risks to the 2019 elections. Given the relative success of the 2015 elections, Independent National Electoral Commission (INEC) ought to deliver credible elections again in 2019. Any regression from the level of performance achieved in 2015 could lead to violence because many will view the failings not as a result of incompetence but as a deliberate attempt to frustrate the will of the voters.

It is up to the combined efforts of political parties, securities agents, and INEC to curb election violence, but the bulk of the responsibility lies with the electoral body to maintain political stability.

ELECTION WATCH

General Elections are scheduled in the first quarter of 2019. The ruling party All Progressive Congress (APC) had witnessed so much party frictions and divisions since its inauguration as the governing party in May, 2015. The Governor has apparently succeeded in pushing all his political adversaries out of the party and played a major role in the party primaries where his close allies clinched party tickets at various levels. The Governor was unopposed in the party Governorship primaries and as such was given the Governorship ticket for the 2019 General Elections.

The former ruling party, the People's Democratic Party (PDP) has been quiet at State level since its defeat in the 2015 General Elections. However, the PDP has conducted hitch free primaries where Hon. Isa Ashiru, a former member of State House of Assembly and House of Representative clinched the Party ticket beating other powerful party Governorship aspirants. The party is expected to capitalise on the growing frustration, unpopular reforms and decisions of the incumbent Governor.

The political permutation in Kaduna state ahead of the 2019 gubernatorial election took a new dimension when the incumbent governor of the All Progressives Congress (APC) announced his choice of Dr. Hadiza Balarabe. Dr. Balarabe, a Muslim, hails from Sanga local government area of Southern Kaduna, a Christian dominated zone. Following the announcement, tongues have continued to wag as to the choice of the governor who for the first time is embarking on a Muslim/Muslim ticket in a state that has maintained to a greater extent of religious balance in the sharing of political positions since the return to democracy in 1999.

Being that Kaduna just went through a round of crisis owing to the death of a certain royal father of Agom Kingdom and also knowing the volatility and spontaneity Kaduna usually uses in exploding at the slightest provocations, it is now then noteworthy to examine if Governor Nasir el-Rufai thought it through before embarking on his choice of a Muslim-Muslim ticket for such a state as Kaduna.

While el-Rufai may have been prompted by political considerations, it is understood that some who have gone along with him are also hoping to use this development to give a Technical Knock Out to those who claim that Kaduna has a substantial proportion of Christians. If el-Rufai is able to prove the point by winning the election it would undoubtedly change the narrative as concerning the distribution of political powers in the State.

Remarkably, there is an option for the voters as the Peoples Democratic Party, PDP has come up with Isa Ashiru as its candidate with Sunday K. Marshall as running mate, a Christian from Southern Kaduna. However, whether or not Governor el-Rufai's choice of a Muslim as his running mate will affect his chances of winning the election positively or negatively will be left to the electorates to decide.

Time Table for the 2019 General Elections

S/No.	Event	Date
1.	Notice for elections,	August 17, 2018
2.	Collection of nomination forms for national and states elections by political parties.	between August 17 and August 24, 2018
3.	Conduct of party primaries Elections for national and state elections	From August 18 to October 7, 2018.
4.	Collection of nomination forms for FCT elections by political parties	From September 3 to September 10, 2018
5.	Party primaries for the FCT Area Council election	From September 4 to October 27, 2018
6.	Publish the personal particulars of National elections candidates	October 25, 2018
7.	Publish the personal particulars of the State Candidates	November 9 th , 2018
8.	Last date for the withdrawal or replacement of candidate(s) for president and NASS elections,	November 17, 2018
9.	Political campaigns by political parties for Presidential Election and NASS elections	From November 18 to January 14, 2019
10.	Last date for submission of nomination forms by political parties	December 3 for president and NASS elections, while state elections is December 17.
11.	Last date for the withdrawal or replacement of candidate(s) for Governorships and State House of Assembly Elections	December 1 st , 2018
12.	Political campaigns by political parties for Governorship and State Houses of Assembly	From December 1, 2018 to February 28, 2019.
13.	Publish notice of the polls	January 2, 2019,
14.	Publish official register of voters for the election	January 7, 2019
15.	Political party's submission of names of their agents for the elections	February 1, 2019
16.	The presidential and National Assembly elections	February 16, 2019,
17.	Governorship and state assembly and Abuja Area Councils elections	March 2, 2019

INTERNATIONAL RELATIONS

Nigeria operates a Federal system of government which its constitution clearly defines the roles and responsibilities of the three tiers of government thereby forestalling any form of overlapping and duplication of responsibilities. The Exclusive List in the Constitution is the sole responsibility of the Federal Government. These responsibilities include: International Relations and Foreign Affairs, Defence, Power, Telecommunications and so on. Kaduna State being a sub-national government, cannot operate an International Relations or a Foreign Affairs Department. Notwithstanding, the State has tremendous respect in the eyes of the international community from the advent of the current administration due to the Governor's and some of his Aids international experience and influences.

This can be seen as the Commissioner for Planning and Budget, Muhammad Sani Abdullahi appointed as a Member of World Bank Advisory Committee on Citizens Engagement. Mr Abdullahi along with other appointees would advise on development and implementation of a strategic framework for mainstreaming citizen engagement in World Bank Group operations. His appointment came on the backdrop of the giant strides recorded in the State as he initiated the development of Kaduna Citizens Feedback Application and citizens call centre to ensure that citizens directly monitor budget implementation as well inform government of their priorities. He also modernised and digitalised the Monitoring and Evaluation of the State by introducing the Eyes and Ears Platform and an Android application giving citizen a chance to participate in M&E, he facilitates budget town hall meetings to get citizens feedback, while leading civil society consultations, engagement and coordination on all state planning and budget activities.

This is the first time a Nigerian would be appointed as a member in the World Bank Advisory Council. The appointment is usually for ministers of national governments that are appointed under the Government category not sub-national/State Commissioners. This will really give a boost to the image of Kaduna State and its efforts on citizen engagement internationally.



million bpd, compared to the output recorded in the same period last year.

“For 2019, OPEC revenues are expected to be \$719bn, as a result of lower forecast crude oil prices. Slightly lower OPEC production and exports also contribute to the decline in expected earnings.

NON-OIL REVENUE

About 2.05 per cent growth recorded in the non-oil sector in the second quarter of the year is evidence the Economic Recovery and Growth Plan (ERGP) implementation is yielding positive results. Recently, the National Bureau of Statistics (NBS) published the latest gross domestic product (GDP) growth data, which showed the non-oil sector performance was the strongest growth since the fourth quarter of 2015.

According to the NBS report, the non-oil sector growth was driven by the three priority areas identified under the ERGP. They included transportation (road, rail water and air), which grew by 21.76 per cent, followed by construction (7.66 per cent) and electricity (7.59 per cent). Other non-oil sectors that drove growth in the second quarter include telecommunications (11.51 per cent), water supply and sewage (11.98 per cent) and broadcasting (21.92 per cent).

The industrial sector also maintained a continued positive growth rate, as a result of the performance of manufacturing and solid minerals, which grew by 0.68 per cent and 5.24 per cent respectively in the second quarter. The Services sector recorded its best GDP performance in nine quarters, growing by 2.12 per cent, compared to a contraction of -0.47 per cent in the first quarter of the year and -0.85% in second quarter of 2017. The NBS report showed headline inflation has consistently declined from 18.72 per cent in January 2017 to 11.14 per cent in July 2018, amid significant capital inflows to the economy.

Nigeria is in a pre-election period, and fiscal and inflationary pressures are increasing. The non-oil sector outlook remains weakened due to ongoing conflicts, despite targeted government support (import restrictions and subsidized financing schemes). The growth in non-oil sector – the biggest share of the economy – will remain limited by a slow recovery in private demand, but with its momentum likely strengthening by the election-related public spending in the second half of 2018 and early 2019. The central bank is expected to closely control the level of liquidity in the economy to maintain the exchange rates stable.

MAJOR INTERVENTIONS IN KADUNA STATE 2015 – 2017

In an effort to meet its campaign promises in line with its policies, the State Government intervene in some major Sectors/Activities, these includes;

EDUCATION

1. Construction of 6 science secondary schools across the 3 senatorial zones for both female and male.
2. Introduction of free girl child education.
3. Introduction of second chance program for female students drop out.
4. The introduction of Better Education Service Delivery for All (BESDA).
5. Employment of fresh 24,799 qualified Primary Schools Teachers.
6. Introduction of Bilingual Education for Islamiyya and Almajiri to study both Arabic and English.

HEALTH

7. Passage of Law to commence Health Insurance Scheme.
8. Comprehensive data base of Health Facilities in the State for better decision making.
9. Establishment of unified pricing of medicine across public health facilities.

COMMERCE AND INDUSTRY

10. Invitation and signing of MoUs on different investments in the State from Dangote Group of Company (in Automobile industry), VLISCO (in Textile industry), and some prospective investors from China. (also from Netherland)

AGRICULTURE

11. The Implementation of Agro Processing Productivity and Livelihood Support (APPEALS) Project for Women & Youth Empowerment.

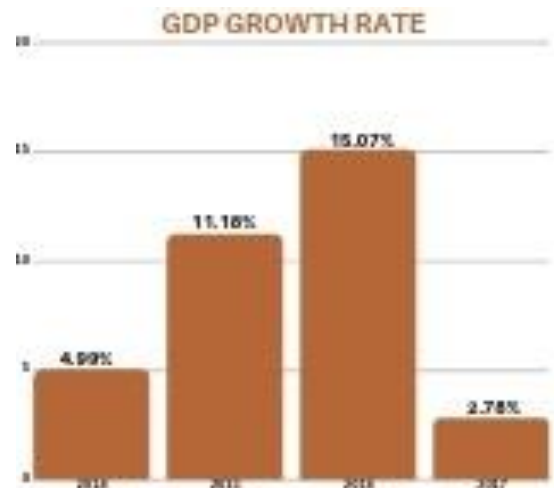
OTHER INTERVENTIONS

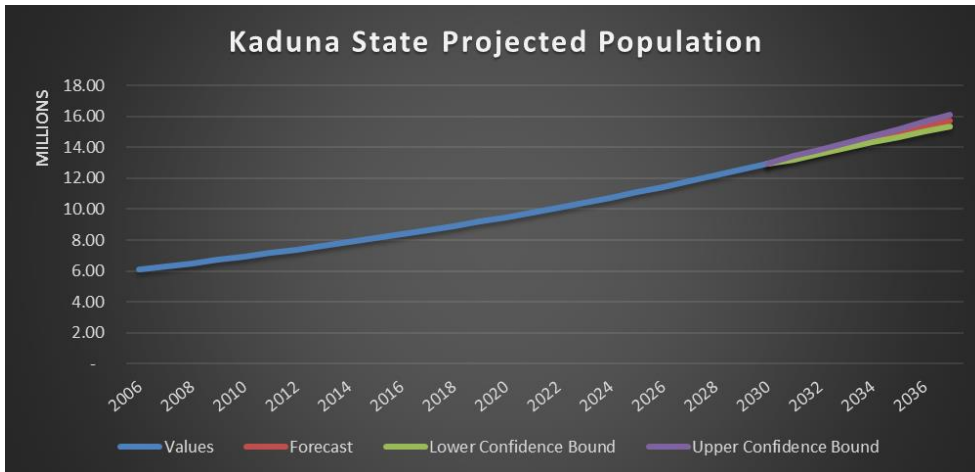
- 13. Newly commissioning of Joint Kaduna Entrepreneurship Center (KADSEC) at Kaduna Trade Fair Complex.
- 14. Development of the Kaduna State Gender and equitable Budget Initiative.
- 15. Establishment of a Climate Change Unit in the Ministry of Environment and Natural Resources.
- 16. Development of the Community Development Charters and Local Government Development Plans.
- 17. Kaduna State developed and launched a Priority Action plan on End Violence Against Children Campaign.
- 18. Beneficiaries of Special Women Empowerment Program with the sum of ₦200m set aside to be disbursed have been screened.

KADUNA STATE ECONOMIC GROWTH

The State largely depends on Federal Allocation to fund its annual budget. Averagely the state was allocated ₦3.073, ₦2.225 billion and ₦2.675 billion monthly in 2015, 2016 and 2017 respectively.

Kaduna State had witnessed a steady growth in its GDP since 2013. The State's GDP stands at ₦2.66 trillion in 2017 as against ₦2.58 trillion in 2016, ₦2.25 trillion in 2015, ₦2.02 trillion in 2014 and ₦1.92 trillion in 2013. The GDP grew by 4.99% in 2014, 11.18% in 2015, 15.07% in 2016 compared to 2.78% growth recorded in 2017 (year on year) in real terms and GDP per capita stands at ₦316,926.09. Kaduna State contribution to National GDP dropped from 2.5% in 2016 to 2.3% in 2017. The figures further show that Services contributed 50.60%, Agriculture 38.04% and industries 11.35% to 2017 total GDP.



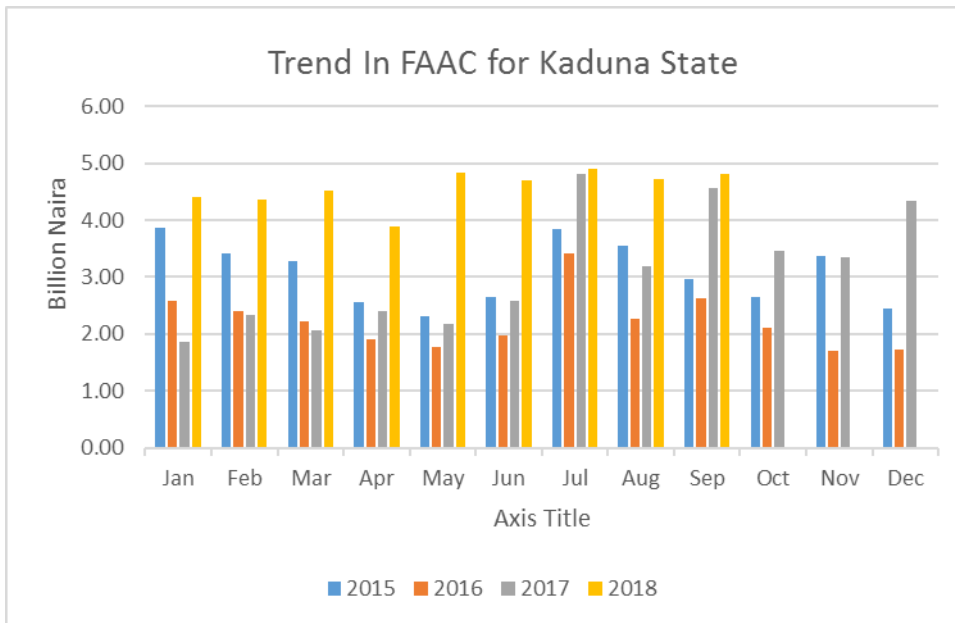


Source: KDBS

KADUNA STATE POPULATION PROJECTIONS WITH TREND ANALYSIS

Timeline	Values	Forecast	Lower Confidence Bound	Upper Confidence Bound
2006	6,113,503.00			
2007	6,307,912.40			
2008	6,508,504.01			
2009	6,715,474.44			
2010	6,929,026.52			
2011	7,149,369.57			
2012	7,376,719.52			
2013	7,611,299.20			
2014	7,853,338.52			
2015	8,103,074.68			
2016	8,360,752.45			
2017	8,626,624.38			
2018	8,900,951.04			
2019	9,184,001.28			
2020	9,476,052.52			
2021	9,777,390.99			
2022	10,088,312.03			
2023	10,409,120.35			
2024	10,740,130.38			
2025	11,081,666.52			
2026	11,434,063.52			
2027	11,797,666.74			
2028	12,172,832.54			
2029	12,559,928.61			
2030	12,959,334.34	12,959,334.34	12,959,334.34	12,959,334.34
2031		13,324,010.51	13,201,878.74	13,446,142.28
2032		13,725,246.36	13,588,753.46	13,861,739.25
2033		14,126,482.20	13,962,238.58	14,290,725.82
2034		14,527,718.05	14,323,260.78	14,732,175.31
2035		14,928,953.89	14,674,080.66	15,183,827.13
2036		15,330,189.74	15,016,664.02	15,643,715.46
2037		15,731,425.59	15,352,392.03	16,110,459.15

Source: KDBS



INFLATION

Nigeria's annual inflation rate rose further to 11.28 percent in September of 2018 from 11.23 percent in August. It was the highest inflation rate since May, mainly due to higher cost of food. On a monthly basis, consumer prices went up 0.84 percent, easing from a 1.05 percent gain in the prior month. Inflation Rate in Nigeria averaged 12.48 percent from 1996 until 2018, reaching an all-time high of 47.56 percent in January of 1996 and a record low of -2.49 percent in January of 2000.

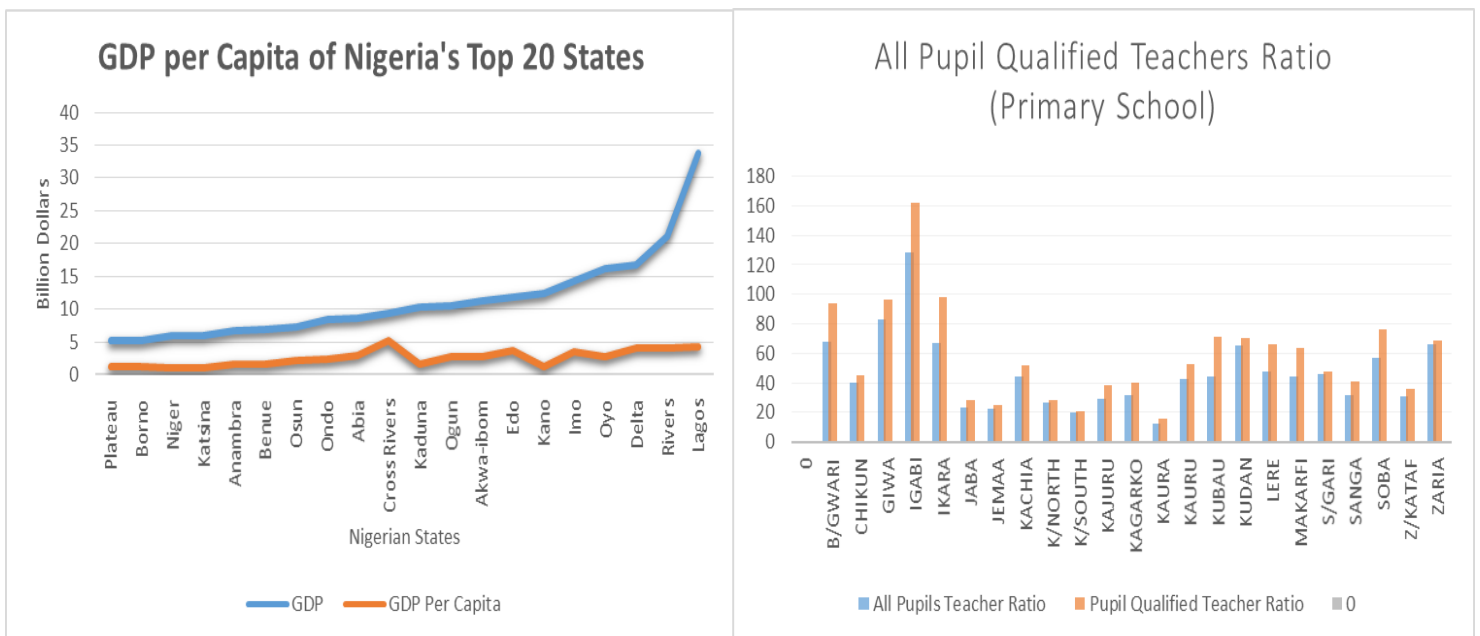
However, inflation is expected to increase slightly towards end-2018, averaging about 13% over the year, declining slowly in the medium-term. Accelerating growth will slow-down poverty increases: it will remain largely stagnant in 2018-2019, increasing by 0.5 percentage points by 2020 using the US\$1.9 PPP line. However, due to Nigeria's high population growth rate, gains from GDP growth are diluted and high inequality also results in limited trickle down to low income groups. The fiscal deficits will likely widen in 2018 due to increased pre-election spending and sustained revenue shortfalls. Focus Economics Consensus Forecast panellists expect inflation to average 12.0% in 2018, which is unchanged from last month's forecast. In 2019, inflation is seen averaging 10.1%. According to the panellists forecast.

EXCHANGE RATES

At its 24–25 September meeting, the Monetary Policy Committee (MPC) of the Central Bank of Nigeria (CBN) decided to leave the monetary policy rate as well as all other monetary policy parameters unchanged, meeting market expectations. As a result, the policy rate remains at a record-high 14.00%, with the asymmetric corridor at plus 200 and minus 500 basis points around the monetary policy rate. In addition, the Committee left the liquidity ratio unchanged at 30.00% and the cash reserve ratio stable at 22.50%. Notably, three MPC members voted to raise the policy rate and three voted to raise the cash reserve requirement due to high inflationary pressures.

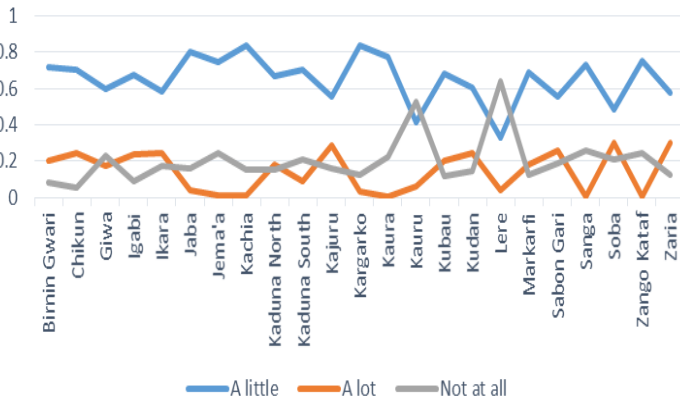
Specifically, pre-election spending, flooding and the farmer-herdsmen conflict in key food-producing states are threatening to keep price pressures high, while capital outflows have dented the Central Bank’s international reserves. That said, better harvests in the coming months could help relieve some pressure on prices

Focus Economics Consensus Forecast panelists expect the monetary policy rate to start year 2019 at 365.49 per dollar and end at 366.04 per dollar in December 2019 (Dollar to Naira).

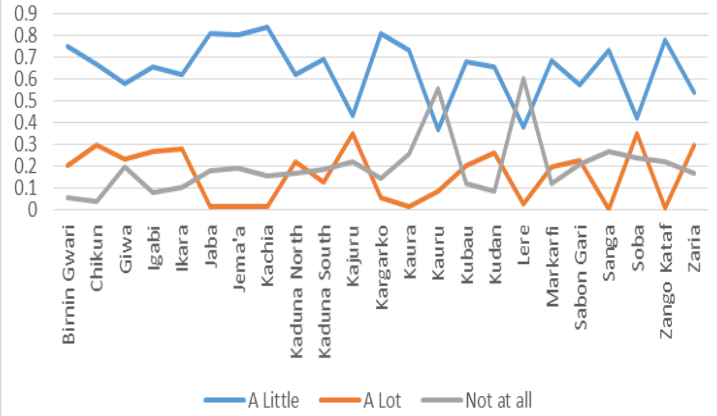


Source: KDBS (General Household Survey, 2017)

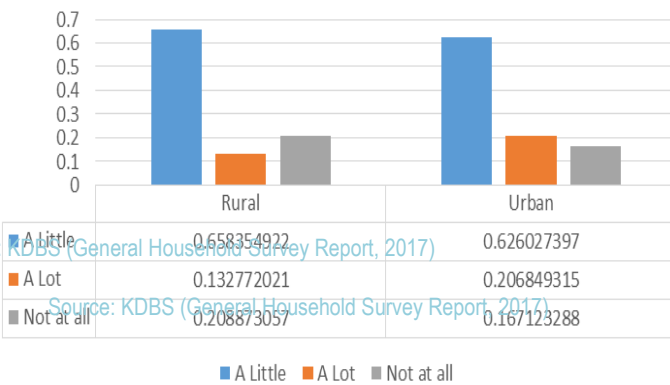
Reactions to State government Policies and decision-making to the needs of Residents



Perception of Kaduna State residents on whether the Government prioritises the poor on its decision-making.



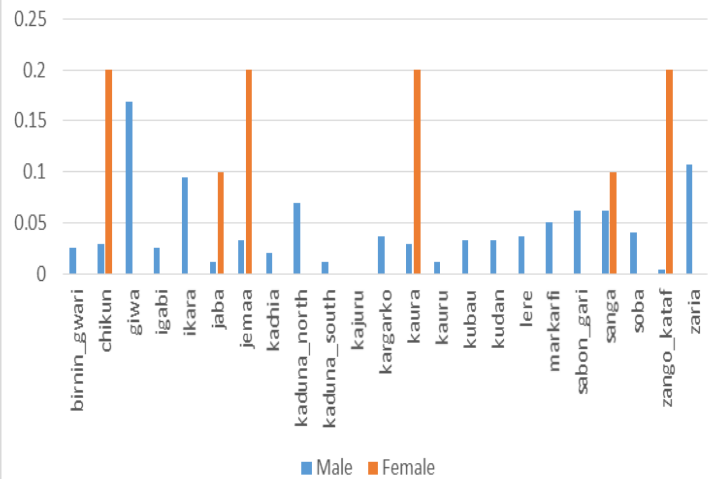
Perception of Kaduna State Residents on government decision-making response to their needs



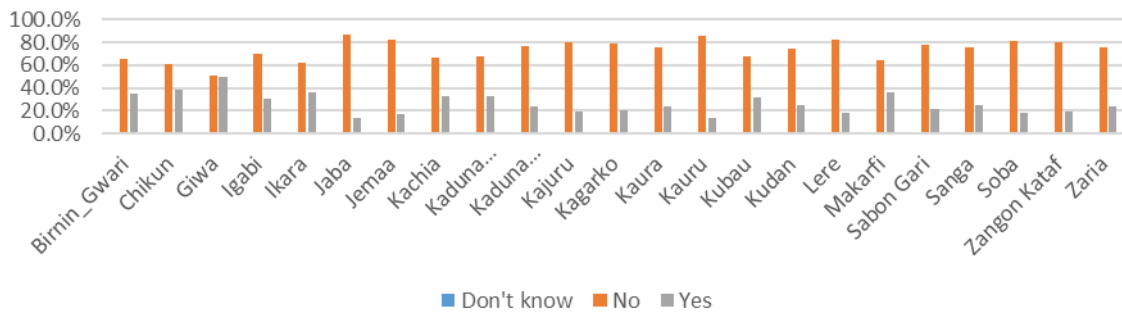
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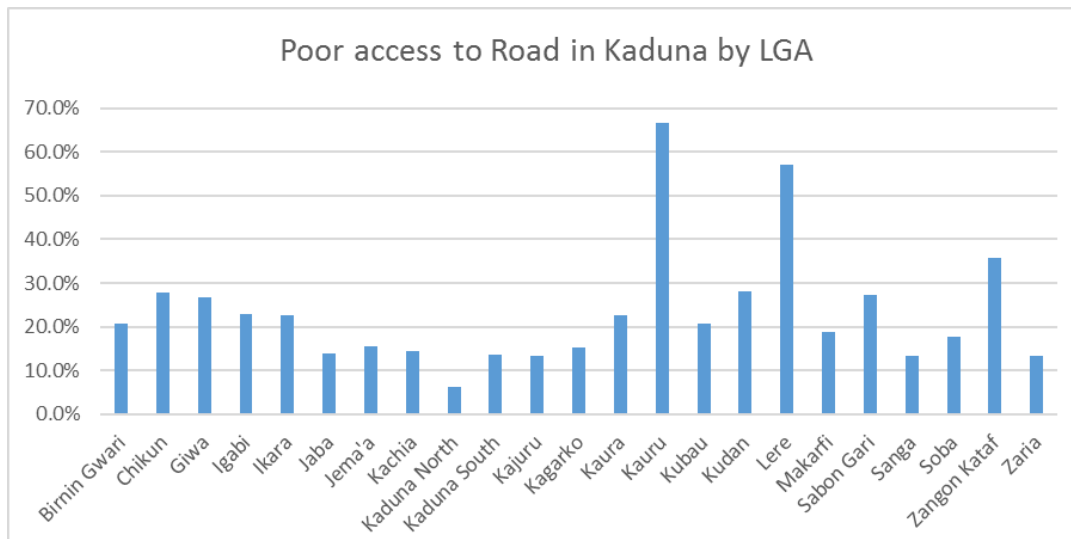
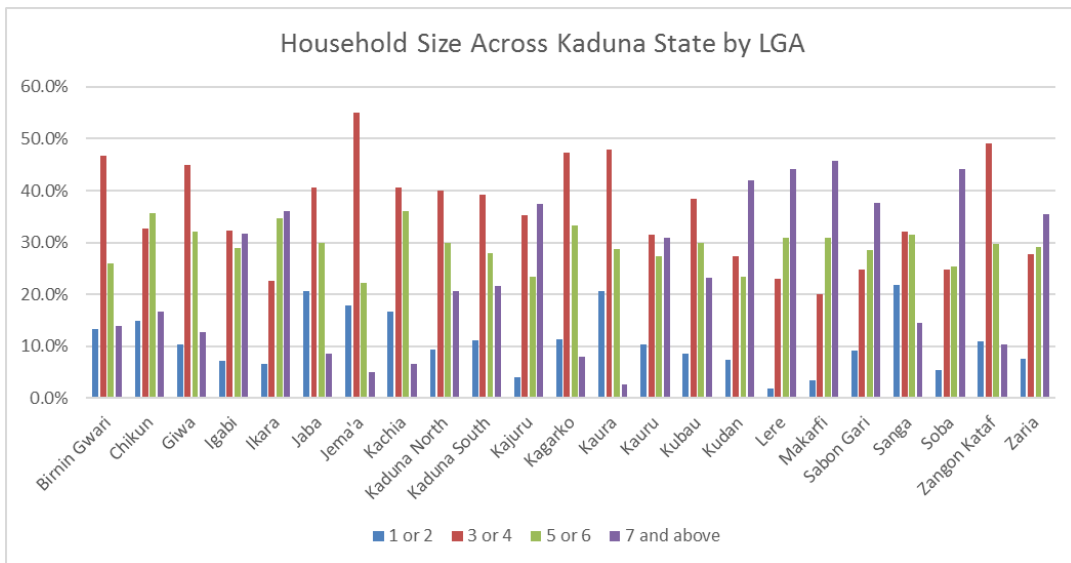
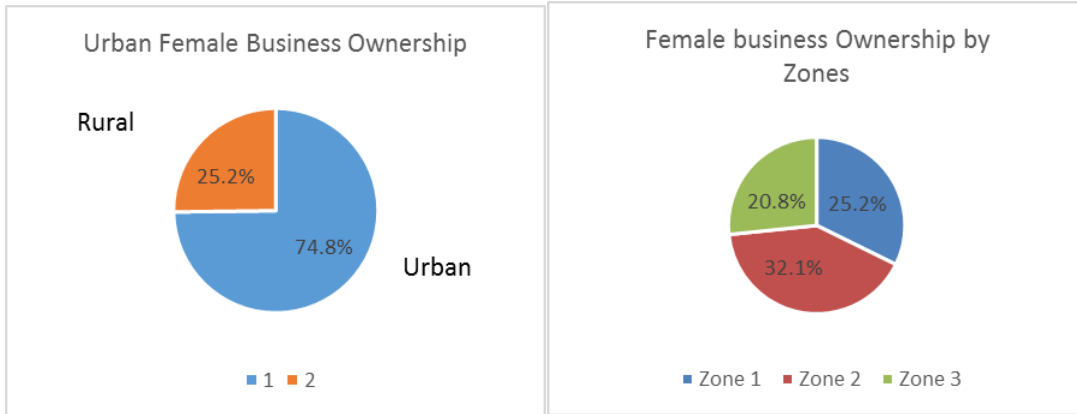
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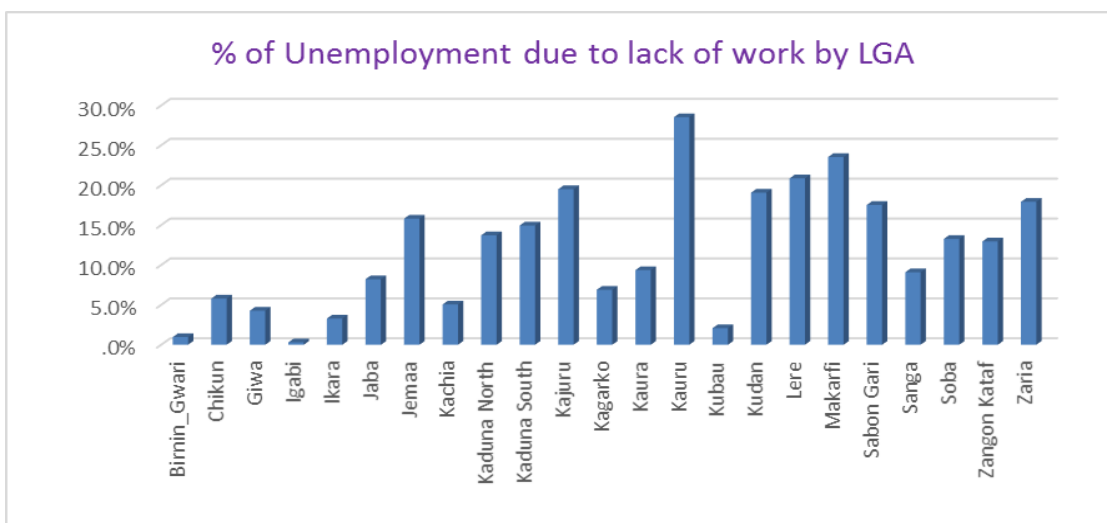
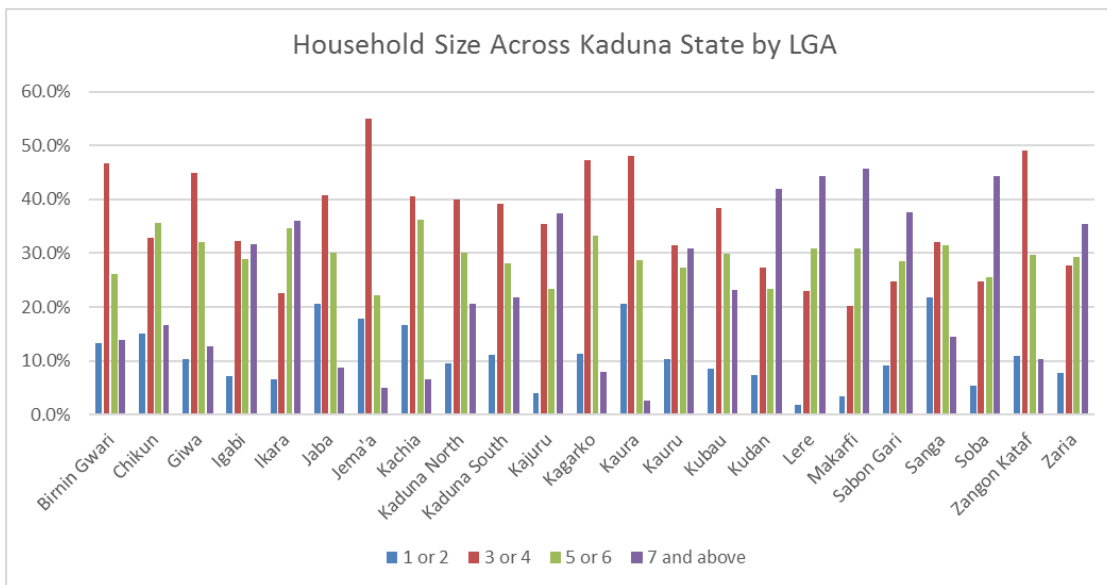
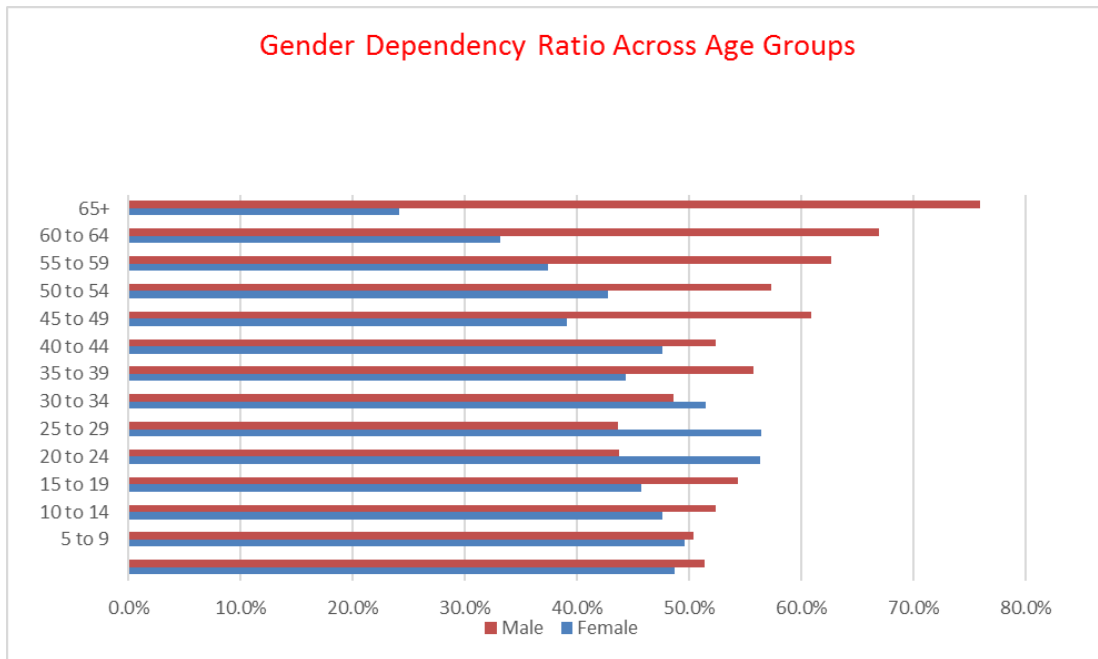
Membership of farmers Cooperative/Association



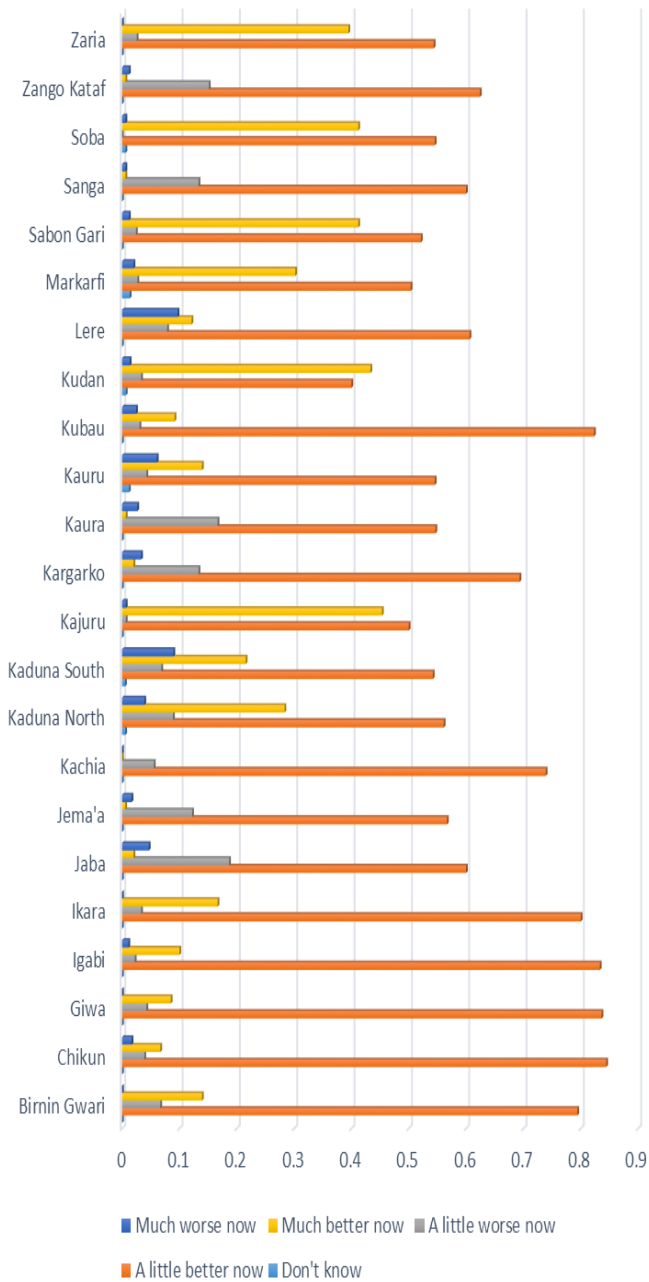
Female Business Ownership in Kaduna State



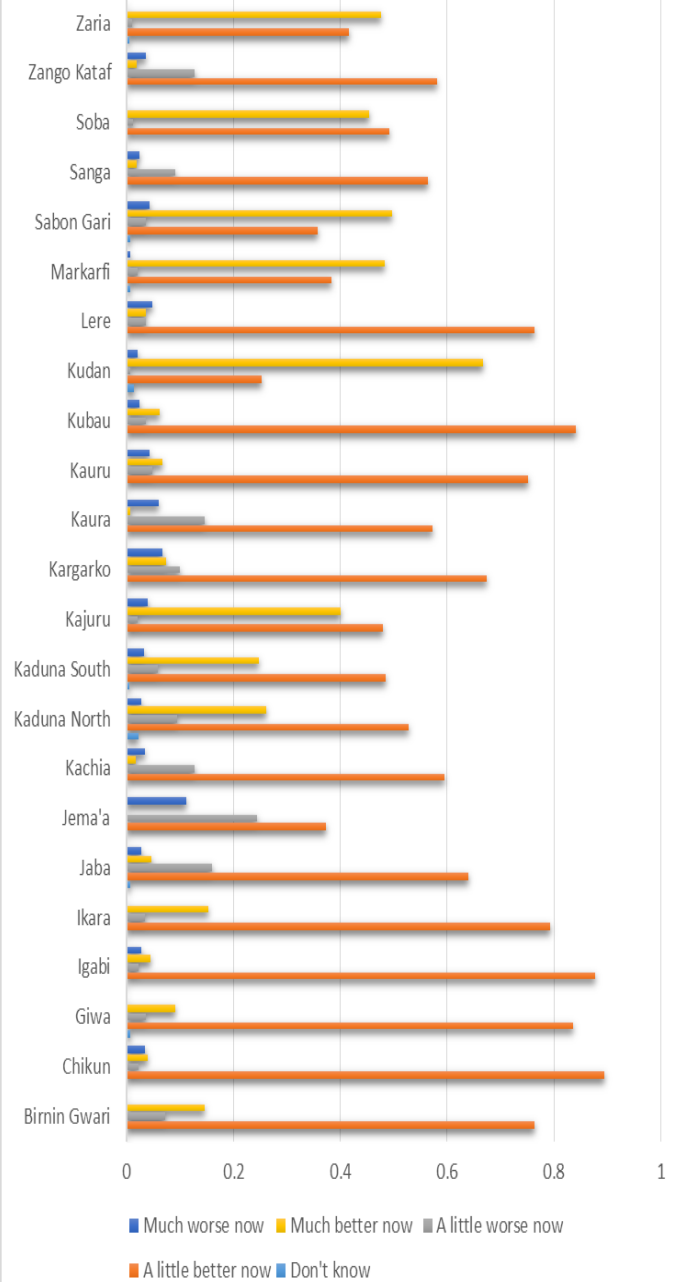


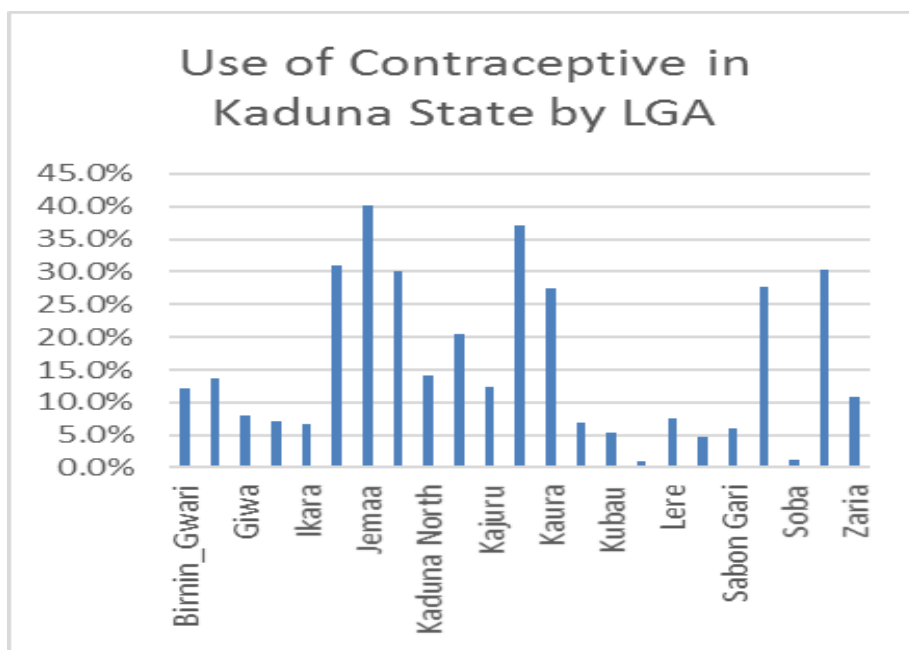
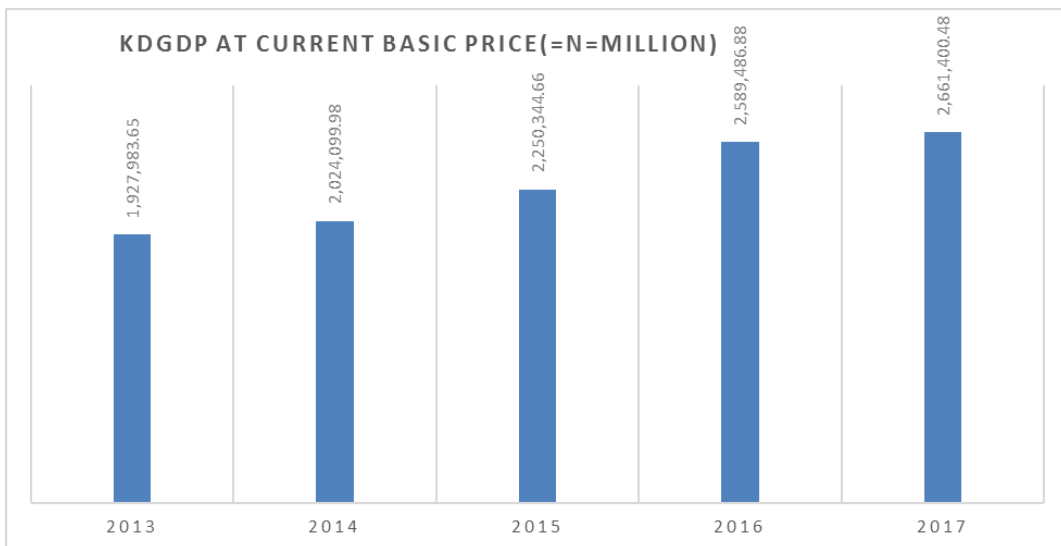
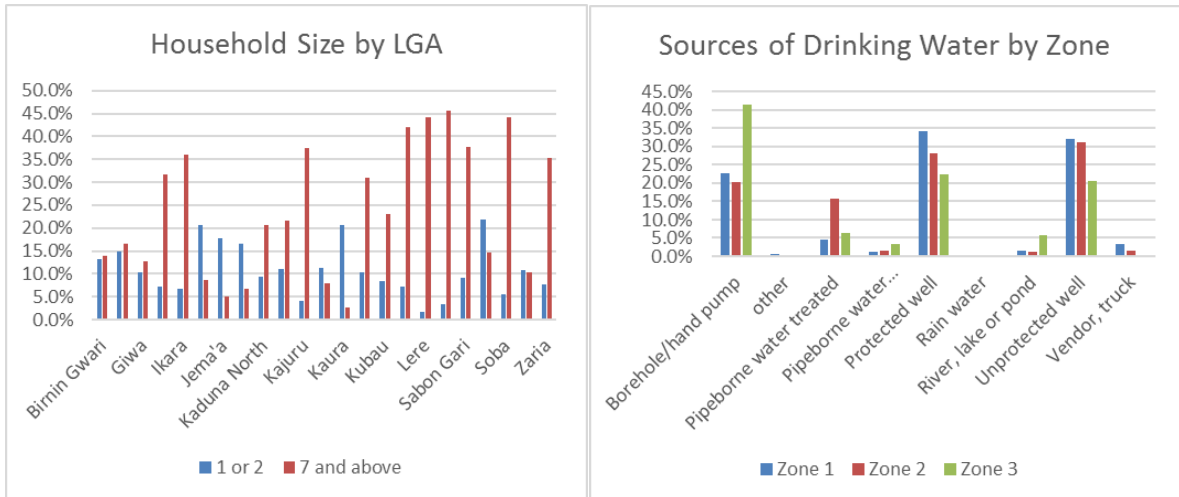


Resident's perception on Kaduna State Government performance



Responses on Level of crime and safety in Kaduna State NEIGHBOURHOODS





BASIC DATA

LAND MASS

46,020sq km (17,781 sq. mi), this makes Kaduna the 12th largest state in the country.

POPULATION

With an estimated population of 8.9 million in 2019, it is the 3rd most populous state in the federation.

MAIN TOWNS AND THEIR POPULATION

Population in millions (KSIP 2019)

Igabi: 627,610

Zaria: 595,472

Kaduna North: 587,450

Kaduna South: 580,511

Chikun: 537,197

Lere: 483,092

Zangon Kataf: 461,515

Soba: 427,817

Sabon Gari: 418,483

Giwa: 417,835

CLIMATE

The state enjoys a typical tropical continental climate with two distinct seasons, i.e. The dry and rainy seasons. These seasons reflect the interplay of North-East trade wind and South West trade wind which sweeps across the entire country from November to April and May to October respectively.

WEATHER IN KADUNA (ALTITUDE 613 METRES)

Kaduna lies between latitude 10.5105° North of the Equator and longitude 7.4165° East of the Greenwich Meridian with annual average temperatures: High - 31.6°C, low - 18.5°C and an average temperature of 25.0°C. The Average annual precipitation is 1192 mm.

Gross Domestic Product (GDP)

Kaduna State Gross Domestic Product (GDP) was measured at N2.66Trillion with an annual growth rate estimated at 2.78%

GROSS DOMESTIC PRODUCT (GDP) COMPOSITION

The State's GDP in 2017 comprises of Services (50.60%), Agriculture (38.04%), and Industry (11.35%).

LANGUAGES

English (official), Hausa, Yoruba and Ibo; many other local languages are widely spoken.

+PROMINENT ETHNIC GROUPS

Adara, Kutunni, Hausa, Fulani, Koro and Bajju Gbagyi, Ham, Chat, Kagoma, Yeskwa, Fantswam, Kaninko, Gwandara , Ninzom, Numana, Ayu, Nandu, Tari, Mada Numbu, Nindah, Kibo, Kagoro (Agrok), Maro' a (Asholia), Attakar (Akadi), Ganawuri, Bajju, Atyap (Kataf), Bakulu (Ikulu), Anghan (Kamantan), Ruruma, Rumaya, Surubu, Chawai (Tsan), Kiwalto Rishuwa, Kono, Kaibi, Kuruma, Amo, Kahugu, Gure, Pitti, Gbagyi, Kumuku, Maguzawa, Sayawa, Amo.

MEASURES

Metric system

CURRENCY

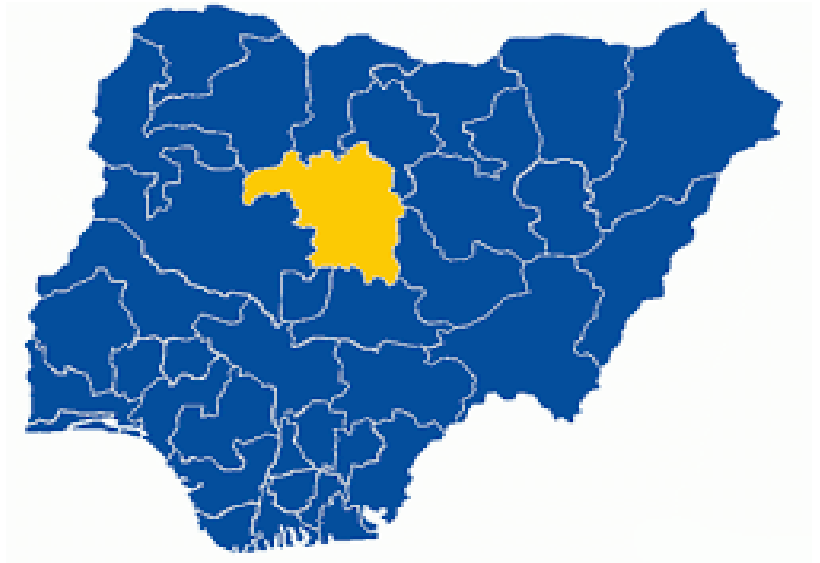
1 Naira (N1) = 100 kobo & N303.952 = US\$1 (2018 average)

TIME

WAT (UTC+01)

PUBLIC HOLIDAYS

New Year's Day; Good Friday; Easter Monday; Worker's Day (May 1st); Democracy Day (May 29th); Eid al-Fitr; Eid al-Adha; Independence Day (October 1st); Mawlid al-Nabi; Christmas



POLITICAL STRUCTURE

OFFICIAL NAME

Kaduna State

FORM OF STATE

Comprising 23 LGAs with Kaduna serving as its capital.

LEGAL SYSTEM

Based on English Common Law and Sharia law

STATE LEGISLATURE

State House of Assembly, comprising of 34 House Representatives; all of which were elected by universal suffrage for four-year terms.

NATIONAL ELECTIONS

The upcoming general elections were scheduled to hold in February and March (Presidential and Gubernatorial elections respectively) 2019; the incumbent governor, Mallam Nasir el-Rufai, was elected and nominated as flag bearer of the ruling party, the All Progressives Congress for the general elections. The Governor will like to test his popularity coming next general elections.

GOVERNOR

Elected by universal suffrage to serve a four-year term

STATE GOVERNMENT

The State Executive Council, is chaired by the Governor.

MAIN POLITICAL PARTIES

The All Progressives Congress (APC), a merger between the All Nigeria People's Party (ANPP), a faction of All Progressives Grand Alliance (APGA) and the Congress for Progressive Change (CPC); and a faction of the People's Democratic Party (PDP), which ruled from 1999 until its defeat by the APC in 2015.

MEMBERS OF THE EXECUTIVE COUNCIL

1	Nasir Ahmad el-Rufa'i	Governor
2	Barnabas Yusuf Bala	Deputy Governor
3	Dr. Paul Dogo	Commissioner for Health & Human Services
4	Hajia Hafsat Baba	Commissioner for Women Affairs & Social Development
5	Dr. Ibrahim Hamza	Commissioner for Water Resources
6	Dr. Manzo Maigari	Commissioner for Agriculture & Forestry
7	Professor Kabiru Mato	Commissioner for Local Government Affairs
8	Hon. Suleiman Abdu Kwari	Commissioner for Finance
9	Muhammad Sani Abdullahi	Commissioner for Planning and Budget Commission
10	Jafaru Sani	Commissioner for Education, Science & Technology
11	Dr. Amina Dyeris Sijuwade	Commissioner for Environment & Natural Resources
12	Hon. Daniel Auta	Commissioner for Youth, Sports & Culture
13	Mrs. Ruth Geoffrey Alkal	Commissioner for Commerce, Industry & Tourism
14	Barr. Umma Hikima	Commissioner for Justice
15	Balaraba Aliyu Inuwa	Commissioner for Works, Housing & Transport
16	Usman Mahmud Hassan	Commissioner for Rural & Community Dev.
17	Balarabe Abbas Lawal	Secretary to the Council

appointment. A statement from Government House disclosed that Malam Nasir el-Rufai has appointed her as Senior Adviser-Counsellor, with immediate effect. She is currently Executive Secretary of the State Primary Health Care Development Agency.

Analysis

The appointment of the running mate of the Governor as Senior Adviser-Counsellor will give her a bird's eye view of the workings of the State and will be better equipped to handle the role of the Deputy Governor in the event they win the 2019 Governorship Elections.

Impact on the Forecast

This is the first time Kaduna State will be fielding a Muslim/Muslim ticket since 1999. The role of Senior Adviser-Counsellor and as a woman, being the running mate to the Governor will increase gender equality and increase the role in women in politics and governance in the State.

ECONOMY

Forecast Updates

Economic Stability

Kaduna Conclude 3rd Economic and Investment Summit

Kaduna state government conclude the 3rd edition of its flagship economic and investment summit on the 5th April 2018. the summit is meant to outline the investment potential of the state as well as bring together investors and other stakeholders. The high point of this edition includes unveiling the 65.6 billion Kaduna state Infrastructure Master Plan (2018-2050).

Analysis

KADIPA, the State Government agency responsible for investment promotion say that the State's economy has grew five time more than the nation's economy in 2017. The state recorded more than 11% while the nation's GDP barely recorded 2%. Since inception, the summit has attracted a number of companies which include: HSV Farms, Jifatu Shopping Mall, Capital Rice, Olam Poultry and Feed Mill, Vicampro Potato Farm and Processing Plant, Falgates Food Manufacturing, Mahindra Tractors, Blue Camel Energy, Markets and Neighbourhood Centres and many more.

Impact on the forecast

The Summit will continue to draw major investments into the State thereby creating hundreds and thousands of direct and indirect jobs which will boot the socio-economic potentials of the State. Revenue will increase mainly through taxes and fees for setting up new companies, GDP will also increase as well, and insecurity will decrease.

World Bank reiterates Its support for Kaduna State

Kaduna state government received a delegation from the World Bank led by senior director for governance, Mrs. Deborah L. Wetzal, at sir kashim Ibrahim house, Kaduna. Mrs. Wetzal stated that Kaduna state is the first state she is visiting in Nigeria she commends Kaduna state government for being progressive despite the challenges.

Analysis

The World Bank and the Kaduna State maintains cordial partnership which was rejuvenated from the advent of this administration. This can be seen when the World Bank granted approval of \$350 Million to the State ahead of many other States requesting the loan facility. The World Bank in intervening in many sectors in the State.

Impact on the Forecast

World Bank support will boost socio-economic activities in the State. The ripple effect on the economy will result in increased job creation, improved infrastructure across all sectors especially schools and primary healthcare centres, roads and resuscitation of moribund industries in the state and good governance.

HEADLINE

VLISCO To Set Up Shop in Kaduna State.

Governor Nasir Ahmad el-Rufai received Mr David Suddens, CEO VLISCO group and his team who are looking at investing in Kaduna. VLISCO produces and distributes fashion fabrics for the west and Central African markets and African consumers in global metropolitan cities.

Analysis

The investment by the parties in resuscitating the Kaduna Textile Limited will bolster the economy of Kaduna State. It will create job opportunities, increase its Internally Generated Revenue and have a positive effect in its GDP. Cotton farmers will also benefit by this great feat.

Impact on the Forecast

Although there is no definite date for the commencement of VLISCO operations, but we foresee a very robust economy where unemployment is drastically reduced, an increased in the State's GDP, economic growth and development if the proposal comes to past eventually.

HEADLINE

Kaduna State No. 1 in registering property, enforcing contracts – World Bank

The World Bank has ranked Kaduna State number one in registering property and enforcing contracts in its latest ranking of doing business in Nigeria. The bank also ranked Kaduna State fifth in ease of doing business and 17th in dealing with construction permits in its 2018 assessment. This was contained in the bank's "Doing Business in Nigeria, 2018 Report".

Analysis

Kaduna as the most improved state in the 2018 doing business report, having scored an average of 65.97 on the four indicators, is the highest in the country. The state adopted a four-year development plan in 2016 focusing on promoting economic development and boosting private investment through reforming its business environment. From making its company incorporation process electronic to digitising its land registry to streamlining its construction permitting system and the results is impressive.

Impact on the Forecast

We foresee growing number of companies and investments coming into the State. It is part of government's broader effort to develop a market-based economy and improve revenue by simplifying and streamlining administrative procedures and reducing bureaucratic hurdles.

Progress Made with Reforms, But Not Enough

The Nigerian administration has made some good progress with its stated objective of easing the burden of doing business in the country with the el-Rufai led administration at the forefront of this charge. It is against this backdrop that Kaduna State was recently awarded by Business Day. The state is also the first in the Federation to launch an e-procurement portal to improve transparency and accountability in the award of contracts.

The Nigerian administration has made some good progress with its stated objective of easing the burden of doing business in the country. However, these moves fall far short of unshackling the

economy and shifting to a higher pace of growth and job creation. That will take bolder initiatives, but with a president and wider administration looking towards their re-election, time is not on their side with a national vote just months away. Indeed, political and fiscal considerations will likely prevent more rapid progress in fast tacking the economy.

Nigeria was among the ten economies that showed most notable improvement in the World Bank's *Doing Business 2018* report published on October 31st. The country climbed 24 places to 145th in the index. The government has welcomed the report, which said the Abuja administration had carried out reforms in five of the ten areas monitored by the annual review. The president, Muhammadu Buhari, described the progress made by Nigeria in the report as a landmark achievement that symbolises the success of his administration's ease of doing business reforms. He said on Twitter that the goal of the government is to make it easy for people, Nigerians and foreigners, to invest and do business in Nigeria.

PROGRESS ON MULTIPLE FRONTS

The el-Rufai led Administration has recorded tremendous progress in many fronts much especially in; Governance: the present administration has enhanced and revitalized the public service which leads to enhancement in service delivery, transparency and accountability; Education: Improving education is a priority to this administration, where the Governor is ensuring that every child gets at least nine years of free basic education and is improving infrastructure and tools while attracting the best people in character and learning to the teaching profession; Infrastructure: The administration is rehabilitating the State's decaying infrastructure, extending and expanding them where necessary to achieve economic development goals, while creating jobs for youth and women; Agriculture and Natural Resources: The el-Rufai led administration is making agriculture, real estate development, light manufacturing and mining the key drivers of the economy of the State and sources of new jobs for the youth. The administration is also strengthening State own Institutions to function optimally. Many MDAs in the State were given a facelift or remodelled to better serve the people of the State.

YET MAJOR HINDRANCES REMAIN

One of the greatest challenge faced by this administration is on security. Although, the Governor has received praises and accolades in the way he handled the recent Kaduna Crisis which erupted as a result of the gruesome murder of a famous traditional ruler from the Christian dominated Southern Kaduna. The actions of the Governor have boosted his chances of winning the 2019 elections portraying him as a man of peace and proactive. But still kidnapping for ransom

is still rampant in the State with no end in sight. These may affect government politically and in attracting foreign investments. Southern Kaduna remains volatile. Uncompleted projects littered the State which hinders its impact on the populace.

FRESH IMPETUS NEEDED AHEAD OF NEXT ELECTIONS

The government needs to implement a sustainable safety net for vulnerable groups, timely pension payment to its retired citizens. The retrenched civil servant of the State should be provided with palliative measures to serve as social and economic security. These and coupled with Grassroot Development Initiatives (GDI) and timely completion of major projects across the State will increase the chances of the present administration in the next General Elections.

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