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Seeking workable solutions to the electrification challenge in Nigeria: Minigrid, reverse auctions and institutional adaptation

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ABSTRACT

Solving the hydra-headed economic, technical and institutional electrification challenges in the Nigeria Power sector requires innovative insights that decentralized offgrid reverse auction with solar power plus storage offers. However, running a successful auction requires a meticulous design with in-depth understanding of the environment and data access to provide insight on what capacity to procure, locations, costs and regulatory governance.

Combining GIS, energy system optimization and market/regulation design expertise, we contribute to bridging this knowledge gap for the Nigeria Power sector. We identified the most populated consumer clusters without electricity access, made load demand projections and determined the techno-economically optimized PV plus battery storage sizes to achieve high quality power supply with some demand side management. Furthermore, we analysed the land requirements/availability to achieve a shortlist of 233 clusters with 7.2 million people that require 3280 MW solar PV for the proposed auction. Finally, we discussed the pathway to adapt our design to the existing market/regulatory framework.

1. Introduction

Only 58% of Nigerians have access to electricity with 78% access in urban areas and 39% in rural areas [1]. Furthermore, an estimated 80% of those with access also use an alternative source of electricity supply, mostly diesel generators due to reliability concerns [2]. Nigeria currently has an available grid power hovering around 4,000 MW for over 190 Million people. It is estimated that the Nigeria economy loses US\$ 29.3 Billion annually due to the lack of adequate power supply and is estimated to have lost US\$ 470 Billion in GDP since year 2000 due to under-investment in power infrastructure [4]. Providing access to electricity is frequently considered a precondition for sustainable development [5]. Growing evidence, both micro- and macroeconomic, suggests that better electricity infrastructure significantly boosts economic growth and improves a range of development outcomes [3].

Detailed geospatial modelling suggests that decentralized systems, led by solar photovoltaic in offgrid/minigrid systems, are the least-cost solution for three-quarters of the additional connections needed in Sub-Sahara Africa [2]. In addition, renewable minigrid technologies are projected to have an especially large potential in providing universal access to electricity in Sub-Sahara Africa [7]. Dramatic cost declines in solar and wind technologies, and now energy storage, open the door to a reconceptualization of the roles of research and deployment of electricity production, transmission, and consumption that enable a clean energy transition [8]. Energy storage solves the temporal mismatch by storing excess PV output in a battery for later consumption [9].

Moreover, the long-term perspectives of the solar PV technology are very favourable based on the ongoing technological improvements and cost reductions in PV technology, batteries and electric appliances [10]. Over the last decades the growth of PV energy use was mainly driven by public incentives, but the shift to an economic driven use of solar PV electricity as one of the lowest cost electricity supplies is obvious [11]. Rapidly decreasing technology costs, increasing reliability, and a growing track record of deployments has strengthened the case for the accelerated adoption of minigrid solutions [12].

Nigeria has good solar resource potentials (the annual average solar radiation varies from $12.6 \text{ MJ/m}^2/\text{day}$ (3.5 kwhr/m²/day) in the coastal latitudes to about 25.2 MJ/m2/day (7 kwhr/m²/day) in the

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North $\left[15\right]$ ¹ Despite this potential, solar PV in offgrid/minigrid applications is still in its infancy. According to a recent study for the World Bank, a cumulative capacity of 236 kW solar minigrid serving about 9100 people exist in Nigeria and the operators are charging a high price between US\$0.58 and US\$0.61 per kWh when they do not receive capital grants [13]. As a potential solution, Arowolo $[60]$,² argued in favour of reverse auctions for solar PV plus storage for the Nigeria market and discussed how the auction run can be successfully executed. The author argued that the capacity to be contracted should be determined based on reliable power demand projections, locational information from Geographical Information System (hereinafter 'GIS') and energy system simulation tools. This is to provide reliable data on the needed procurement capacity (what to bid for) and at specified locations (where). The author posited that the availability of this information is crucial to achieve a competitive auction and effectively mitigate failure risk(s).

Models addressing electricity access typically need large volumes of reliable energy-related data and information, which in most developing countries have been limited or not available [16]. The use of innovative research methodologies such as the application of GIS and remote sensing technologies, spatial evaluation and interpolation of statistical and economic data will support and facilitate strategic energy decisions [17]. GIS are a powerful calculation and analytical tool of spatial variables [6]. GIS layers can provide location specific energy-related information that has not been previously accessible to enable filling data gaps in developing countries using remote sensing techniques and allows for the assessment of spatially explicit energy demand information [16].

Combining GIS, energy system optimization tools and market and regulation design expertise for research and analysis, this paper attempts to bridge the knowledge gaps and make contribution to the solar PV auction design and implementation literature for the Nigeria Power sector in five significant ways. First, we provide the consumer locations without electricity access (hereinafter 'non-electrified clusters') with their breakdown at the administrative decision-making levels (36 states plus FCT and the local governments of Nigeria). Second, we analysed the non-electrified clusters' population to determine the most populated ones that will provide the highest impact on solving electricity access problem with minigrid auctions. Third, we performed the load demand assessments and techno-economically optimized solar PV plus battery capacities for the selected clusters to achieve high quality power supply enhanced by some demand side management. Fourth, we determined the land requirements and ascertained the availability at the nonelectrified clusters to come up with a shortlist of 233 non-electrified clusters that require 3280 MW solar PV plus 7518 lithium-ion MWhr battery storage capacities. This should be the priority locations for the first sets of solar PV plus battery storage minigrid auctions in Nigeria. Finally, we provide the policy implications and implementation guidelines to fit in our proposed design with the existing market and regulatory framework to facilitate decision-making.

We thus strengthened the argument for auctions design for the Nigeria market with the critical groundwork required for minigrid/ offgrid electrification planning and the successful real-life implementation as a contribution to the achievement of SDG7 'Ensuring access to affordable, reliable, sustainable and modern energy for all by 2030' [18] for the Nigeria Power sector.

This paper is structured as follows: Section 2 is the literature review on geospatial electrification planning for Nigeria. Section 3 is the methodology. Section 4 is the results and discussions. Section 5 is the discussion of the regulatory limitations to overcome to successfully

implement our proposed solution. Section 6 is the policy implications and section 7 is the conclusion.

2. Literature review on geospatial electrification planning for Nigeria

In this section, we provide a review of the literature that has attempted to use geospatial modelling for electrification planning for Nigeria.

In their study [17], applied GIS to determine whether solar PV, diesel generator or grid extension is the least cost electrification option in African countries. The authors' analysis shows where grid extension will be the least cost option based on a distance of 10 km, 30 km and 50 km from the low (LV), medium (MV) and high voltage (HV) lines respectively. Their result in Refs. [17,19] for Nigeria as seen on the map of Africa suggests grid extension as the most economical option for a large part of Nigeria.

In a World Bank study [20], the authors used the Network Planner model to determine the least-cost geospatial implementation plan for the Kano Electric Distribution Company (KEDC is one of the 11 Discos³ in Nigeria). KEDC covers Kano, Jigawa and Katsina states. The analysis focused on the grid and offgrid roll-out to achieve universal electrification for an estimated population of 35 million people by 2030 using a weighted average household demand of 840 kWh/year. The authors concluded that grid roll-out is the least cost solution to provide power to approximately 97% of the households requiring a total cost of US\$3.3 Billion for universal access in this area and to provide new or improved connections for 5.3 million projected households by 2030. In a similar World Bank study [21], for the Kaduna Electric covering four states (Kaduna, Zamfara, Kebbi and Sokoto), using a weighted average household demand of 1330 kWh/year, the authors concluded that grid roll-out is the least cost electrification for more than 99% of the households. The authors also concluded that approximately US\$3.8 Billion is required to reach about 5.8 million households for an estimated 39 million people by 2030.

Mentis et al. [22] used a spatially explicit continent-wide model (at 1 km by 1 km resolution) in their Open-Source Spatial Electrification Tool (OnSSET) to consider varying electricity consumption targets to derive the least cost solutions for infrastructure development and resulting generation mix for Nigeria. The authors designed ten scenarios and estimated an investment need between a low of US \$11.7 Billion (20% grid, 0% minigrid and 80% standalone) and a high of US \$153 Billion (78% grid, 16% minigrid and 6% stand alone) to provide universal access in Nigeria. The authors' focused on a technology split between grid, minigrid and standalone solutions based on different levels of electricity access. However, the model does not provide the required macro-information to mobilize actions for initiatives such as Sustainable Energy for All or Power Africa [22].

In a related work, Mentis et al. [23] used GIS to analyze Nigeria on a settlement level with a grid cell size of 2.5 km^2 for electrification planning using 170 kWh/capita/year for rural and 350 kWh/capita/ year for urban areas. In their conclusion, the authors advocated grid extension for 86% of the newly electrified population in Nigeria with 2030 as the time horizon. This will be at a cost of US\$ 11.4 Billion based on the assumption that there is available investment funds and human capacities.

In their paper, Ikejemba and Schuur [24] focused on the location analysis to design a network of solar parks in Anambra State (South East Nigeria) using geographical and demographical characteristics. The authors used a square grid of 3.3 km by 3.3 km and assumed population is uniformly distributed around the grid points to obtain 262 suitable locations for the solar parks. The authors then made a shortlist of 71 ¹ Appendix 6 is the Solar Resource Map of Nigeria (Solargis). 2 potential locations for the installations. Furthermore, the authors ² This paper builds on the discussion in the paper Arowolo [60]; Designing

Reverse Auctions for Solar Power in Nigeria as a potential energy access solution. ³ Disco – Distribution Companies.

assumed that households are at a distance of 30 km from the nearest park and used mathematical (integer linear) programming to determine the best five solar park locations. Thereafter, they allocated the demand of each grid point to conclude that 1,157 MW of generation capacity is required by 2020 in the state.

Ohiare [25] used the network expansion planning (Network Planner) model to estimate the cost projections for three electrification technology options: (a) offgrid (solar PV with diesel generator), (b) diesel generator minigrid and (c) grid electrification. The author recommended grid extension for 98% of the currently non-electrified communities in Nigeria at an estimated total cost of US\$34.5 Billion for 125 million people by 2030. However, the author mentioned the limitation of his model to include the lack of consideration for the constantly changing nature of costs brought about by economic and technological changes. Others are the assumption that all cost conditions remain unchanged throughout the planning period, the costs excluding the technical and geographical constraints of connecting the communities and the exclusion of generation cost for the grid technology [26].

2.1. Knowledge gaps in the literature

Trotter et al. [27]; reviewed 306 scientific journal articles on electrification planning and related implementation analysis on Sub-Sahara Africa and identified further research need as follows. First, several reviewed articles point to the general lack and unreliability of data necessary for electrification planning. Second, no single article could be identified for 12 countries and fewer than 5 articles for 36 of the 49 countries. Third, there is no single study that has planned electrification along more than 3 out of the 5 possible value chain elements. Therefore, the authors advised that it is crucial to conduct electrification planning addressing the specific country or region where it is supposed to be implemented. Moreover, the authors concluded that it would be enlightening to understand the complete implication of a proposed alternative, from understanding the exact demand to selecting a generation technology, operation and transmission planning and the successful implementation.

Considering the research works that focus on Nigeria discussed above, AFREA [20] and AFREA [21] combined are limited to only seven (7) states out of the 36 states plus $FCT⁴$ in Nigeria. Furthermore, their results could only support high level planning to provide universal grid access with the investment total cost estimate for the advocated grid extension and intensification. The authors neither discussed generation source (i.e. where the power supply for the recommended grid roll-out will come from), the currently insufficient status of power supply nor focused on the detailed design of any specific generation technology for the 97% of households in their medium-term interim off-grid solution discussed. Furthermore, their research lacks discussion on the market design and regulatory framework to make their proposal compatible with the existing system to facilitate implementation.

Furthermore, although Ohiare [25] provided broad national coverage compared to AFREA [20] and AFREA [21]; the author neither focused on any specific generation technology nor performed the technical scrutiny of the resource potentials at different locations to facilitate operation.

Mentis et al. [22] and Szabo et al. [17] are at a low resolution of 1 km by 1 km while Mentis et al. [23] is at a grid cell size of about 2.5 km^2 . The papers applied frameworks developed by the authors to provide a broad and top-level overview of Nigeria. The papers lacked in-depth country discussions at the administrative levels that could facilitate informed decisions for operation and implementation.

Ikejemba and Schuur's [24] work is limited to only a state (Anambra), and is at a low resolution of 3.3 km by 3.3 km. In addition, the operation and implementation issues to integrate their proposal with the existing system were not discussed.

2.2. Our present work

We attempt to bridge the knowledge gaps identified in the literature (with a focus on Nigeria) by providing the complete implication of minigrid/offgrid electrification plan with solar PV plus battery storage technology. Our research takes an interdisciplinary approach by combining GIS (for geospatial planning at a high 100 m by 100 m resolution), energy system optimization tools with electricity market design and regulation expertise to achieve the following 1. Generate a robust database of the non-electrified clusters with their breakdown at the administrative levels. 2. Provide the detailed techno-economic optimizations for solar PV plus battery storage at the prioritized non-electrified clusters 3. Determine the land requirement per cluster and ascertain availability and 4. Address the implementation issues to adapt our proposed design to fit in with the existing market and regulatory framework based on indepth understanding of the status quo in the Nigeria Power sector.

3. Methodology

Electrification modelling combining geospatial planning with energy system modelling requires a series of input data to generate a realistic scenario analysis [28]. Our research approach is based on a step-by-step procedure: First, consumer clusters (such as villages, community, town or city etc.) are identified. Second, the electrification status of each consumer cluster is determined with satellite night light imagery and qualitative data from the school location dataset. Third, we provide the detailed breakdown of the non-electrified clusters at the administrative levels. Fourth, the population of the clusters are determined, and the most populated non-electrified clusters were selected for further analysis. Fifth, we applied the World Bank multi-tier framework [29] to make the demand projection at the selected non-electrified clusters. Sixth, we performed techno-economic optimization to determine the solar PV and battery sizes at the selected non-electrified clusters. Seventh, we analysed the clusters with GIS to ascertain the land availability. Finally, based on the above processes, we prioritized the most populated and feasible non-electrified clusters to run solar PV plus storage minigrid auctions in Nigeria.

3.1. Identification of consumer clusters

In this section, we will discuss the process to identify the locations of the existing and potential electricity consumers (the clusters) using population raster data, school location dataset and polling units' datasets.

3.1.1. Population raster data

To identify the populated areas in Nigeria, spatial demographic dataset from Ref. [30] is used as the base source [31] with population density at 100 m spatial resolution. This dataset is the most sophisticated spatially resolved (raster 5 cell pixels) dataset on population figures for Nigeria at the highest (100 m by 100 m) publicly available resolution. For each pixel, an estimated population number is provided. The raster pixels were analysed, and the population density threshold is set at 7 people per pixel ('ppp') i.e 700 people per $km²$ This threshold indicates the location of a community, town or city.

The dataset is then reclassified into a binary dataset containing values of "1" for all areas with a population equal and above 7 'ppp' and "0" for all areas with a population below 7 'ppp'. The resulting binary

⁵ Raster is a digital aerial photographs or satellites imagery made up of matrix of pixels containing a value that represents the conditions for the area covered by the pixel.

⁴ FCT means Federal Capital Territory (Abuja).

raster dataset containing values of "1" are converted to a vector⁶ dataset and a buffer zone with a radius of 500 m is added around the cluster. The 500 m is used based on the typical values for connecting locations within the same low voltage⁷ grid.

Finally, the populated areas are derived from the raster dataset and the consumer clusters are created. This process is illustrated in (Fig. 1).

Thereafter, the [30] dataset is extended with a school dataset [32]. The school dataset is provided by the Nigeria Millennium Development Goal (MDG) Information System. It contains information regarding the educational facilities, number of students, facilities and the administrative information of Nigeria schools. The dataset was collected by the Government and Sustainable Engineering Lab at Columbia University (NY) to facilitate local planning at the national scale of the MDG goals. Trained enumerators using android-based smartphones were used to collect locational information using GPS combined with data available through surveys as described in Ref. [33]. This provides a rigorous, georeferenced baseline data of 98,667 educational facilities in Nigeria. The school point dataset is used to extend the number of the consumer cluster to achieve a higher coverage of the populated areas. Similarly, a buffer zone with a radius of 500 m is added around each of the schools.

3.1.2. Polling units dataset

To further improve accuracy, the Worldpop and school datasets were extended with the polling units' dataset of INEC - Independent National Electoral Commission [34] of Nigeria. INEC's data provides information about local polling units, the location of polling booths and further administrative information. This dataset covers approximately 130,000 polling locations including their latitude/longitude coordinates (geo-located) that match satellite imagery. It is comprehensive, since most settlements have at least one polling unit [21]. Furthermore, the INEC data is the highest resolution and most validated national data source currently available and there is often a close match between polling unit locations and human settlements, particularly larger villages which are easily identified in satellite imagery [20]. Similarly, a buffer zone of 500 m is added around the polling units. The general approach is depicted in Fig. 2.

To create a reliable and comprehensive database useful for decisionmaking, we combined the three datasets to produce a robust database. With this newly created database, we calculated the population in every cluster by summing up the raster population pixel values within each cluster. Finally, administrative areas dataset for Nigeria obtained from Ref. [35], were assigned to each consumer cluster to further enrich the database with information at the administrative state and local government levels.

3.2. Determination of the electrification status

We determined the electrification status of the consumer clusters based on two steps:

Night light imagery [36]: These images are satellite data which shows night light emissions over an area at a spatial resolution of 750 m by 750 m. These regularly visible light emissions are usually based on street lamps or other permanent lights in the villages or communities. This high amount of light activity allows the assumption that any source of electricity exist in an area [28].

Qualitative data from the school dataset [32]: For each school, information is provided whether the facility is grid connected or not. Each cluster was defined as electrified where a grid-connected school is located within a region with night light emissions. Consequently, all the consumer clusters with observable night light emissions and information

on grid connection from the school dataset are considered electrified by grid connection. See Appendix 6 for the map of Nigeria showing the consumer clusters with nightlight emissions and electrified schools.

3.2.1. Administrative breakdown of the non-electrified clusters

We selected the non-electrified clusters from our model for the entire Nigeria. Thereafter, we provide their detailed breakdown at the administrative decision-making levels (36 states and FCT and at the local Government areas in Nigeria).

3.2.2. Determination of minigrid auction sites at the non-electrified clusters

Using the non-electrified clusters identified, we performed the power demand assessment by scaling the population from ≥ 100 to \geq 25,000 to determine the smallest possible number of the nonelectrified clusters that captures the largest population of non-electrified people for the entire country. This would be the priority locations for the solar PV plus battery storage minigrid auctions. With this process, we identified the most populated 340 non-electrified clusters.

3.2.3. Load demand projection

Load demand projections were estimated using an average household size of 6 people for rural areas in Nigeria [37] and the 'Tier 5' assumptions of the World Bank multi-tier framework for minimum 23 h daily power supply (i.e. minimum of 8.2 kwh/day energy consumption) covering households power supply, productive engagements and community facilities [29]. This should capture currently 'suppressed' demand and the anticipated load demand growth within the first year of installation due to the migration of people to the electrified locations, industrial and commercial activities. We thus derived the load demand projections for the most populated 340 clusters.

3.3. Energy system optimization (solar PV plus lithium-ion battery storage) sizing

Using HOMER (Hybrid Optimization of Multiple Energy Resources) software, we determined the optimal combination of the utility scale solar PV capacity (lifetime of 25 years) and the MWh lithium-ion battery capacity (lifetime of 15 years). We used the community load profile based on the peak power demand and the yearly energy requirement (derived from the tier 5 of the multi-tier framework) at the 340 selected clusters. Please see Appendix 5 for our assumptions.

Furthermore, we performed the sensitivity analysis for five scenarios 0% (i.e. uninterrupted power supply), 5%, 10%, 15% and 20% capacity constraints. This is to ensure that for each scenario, we can analyze the different combinations of the excess energy generated and the unmet electrical load occasioned by the community load demand curve. Furthermore, the selected capacity constraints have direct techno-economic impact on the PV and battery size capacities and the Levelized Cost of Energy (hereinafter 'LCOE') calculation.

Hence, the optimized solution avoids overcapacity of solar PV panels and gives high battery autonomy. With some demand side management, it can reallocate the excess energy generated to periods with unmet load to achieve a minimum battery autonomy of 20 h per day at the optimized LCOE. For instance, by using demand response - a reactive or preventive method to reduce, flatten or shift peak demand [38]. Demand side management solutions are crucial in energy management and planning in Africa and should be incorporated in any modelling framework [39]. Furthermore [40], found that demand-side management capabilities can reduce the number of requisite solar panels and batteries due to the integration of real-time management and control.

This simulation was performed separately for each of the 340 clusters due to their different solar irradiations and ambient temperatures to decide the robust scenario per cluster. Performance assessment using location specific parameters is very valuable since PV system cannot be considered a one-size-fits-all [41].

⁶ Vector use geometry (points, lines, and polygons) to represent the real world.

 $⁷$ Low voltage (LV) cable systems up to 1 kV serve to connect buildings and</sup> carry power over short distances of not more than several hundred meters [61].

Fig. 2. Identification of consumer clusters.

3.4. Land requirement and availability

A concern regarding the large-scale deployment of solar energy is its potentially significant land use [42]. Using data for utility-scale groundmounted fixed-tilt solar PV from the US National Renewable Energy Laboratory [42], we used the value of 7.6 acres (30,755.87 $\mathrm{m}^{2})$ per MW

for the installations between 1 MW and 20 MW and 7.5 acres (30351.19 m^2) per MW for the installations above 20 MW to compute the total land requirement for each of the 340 clusters.

Thereafter, we analysed each of the 340 clusters with a combination of the available GIS satellite imagery from Google (2018 imagery), Bing Aerial (2018 imagery), Google Streets and Open Street Maps to

Fig. 3. Map of Nigeria showing the non-electrified clusters with black dots.

ascertain the availability of the total land area required on a cluster-bycluster basis. This analysis also helps to shortlist the number of clusters that should later be physical visited for onsite verification prior to the implementation of our proposed reverse auction. Based on the above processes, we provide the details of the best clusters for solar PV plus storage minigrid auctions in Nigeria.

4. Results and discussions

4.1. Non-electrified cluster population

45,456 non-electrified clusters were identified in the entire Nigeria where an estimated 72.6 million people reside. However, about 10 million people without electricity access are out of the clusters. This population is assumed to live in small or dispersed rural settlements or have no permanent settlement locations and could not be assigned to any consumer cluster. In total, about 82.6 million people without electricity access were identified in Nigeria.

Our result is consistent in the range estimated by some renowned institutions. The World Bank estimated a total of 75 million people without electricity access in 2014 [43], Renewable Energy Policy Network for the 21st century (REN21) estimated 98 million in 2014 [44], while the International Energy Agency (IEA) estimated 74 million without access in 2016 [2].

4.2. Administrative breakdown of the non-electrified clusters

Fig. 3 is the map of Nigeria showing the non-electrified clusters.

We also provide the information on a state by state basis (36 states plus FCT) for the local governments located in the states to provide useful information to decision makers at the individual state and local government levels (please see Appendix 2). Fig. 4 is a sample result of the non-electrified clusters with the breakdown at the Local Government Area (LGA) for one of the states (Adamawa). We chose this state for illustration because it is quite representative. It has both high and low populated non-electrified clusters.

4.3. Determination of minigrid auction sites at non-electrified clusters

Fig. 5 is the result of the non-electrified clusters population scaling (with a minimum of 10,000 people) in the population scale range. Please see Appendix 1 for the full table.

Hereinafter, we focus on the 340 most populated non-electrified clusters with more than 17,000 people per cluster with an estimated 10.1 Million people. These are the priority non-electrified clusters where the first set of auctions run can take place. Therefore, we further screen these clusters in our analysis. The locations of the 340 clusters are shown in Fig. 6 (black dots) on the map of Nigeria.

4.4. Energy system optimization (solar PV plus lithium-ion battery storage) sizing

We made load demand projections of the most populated 340 nonelectrified clusters and simulated the PV and battery sizes in HOMER.

Table 1 is a snapshot of some results of the sensitivity/scenario analysis for a cluster (Lamurde - we chose to illustrate this populated cluster because it is representative with an average solar irradiation of 5.64 kwhr/m²/day and yearly average air temperature of 26 °C).

Furthermore, we performed the geospatial analysis of the clusters based on the land requirement/availability criteria. With these processes, we derived a shortlist of the optimally and carefully analysed 233 geographical locations for the proposed minigrid solar PV plus storage reverse auction (see Appendix 3).

In total, 3,280 MW solar PV capacity plus 7,518 MWhr lithium-ion battery storage capacity requiring a total land area⁸ of 100.55 km² is

⁸ Since we anticipate the states, local governments and communities will provide the land for the projects, they should be promptly engaged to ensure buy-in of the proposed solutions and address potential socio-political obstacles.

Fig. 4. Non-electrified clusters at the Local Governments in Adamawa State.

Fig. 5. Number of clusters per population scale in the 10,000 to 25,000 people range.

required at these 233 non-electrified clusters. Our result shows that solar PV capacity ranges between 6.45 MW and 92.55 MW and lithiumion battery sizes between 15 MWh and 197 MWh are required depending on the cluster. Furthermore, these 233 clusters cover approximately 7.2 Million people without electricity access that are in 187 different Local Governments in all the Nigeria states plus FCT (except Lagos).

Our result (on a finer scale for Nigeria) has enriched the literature by providing in-country micro-level data to increase understanding of the implication of using minigrid/offgrid solar PV plus battery storage for power generation and to facilitate system planning, market design and operations. Nigeria is a big and ethnically diverse country. A toplevel overview or recommendation for Nigeria (at country level) e.g Szabo et al. [17]; Mentis et al. [23]; and Mentis et al. [22] without focusing on what specific state or what local government etc. does not seem to facilitate decision making.

Furthermore, Mentis et al. [23]; Mentis et al. [22]; Ohiare [25]; AFREA [20] and AFREA [21] analysed the investment needs for grid extension. However, funding constraints and the low wheeling capacity of the grid makes their findings challenging for stakeholders to

implement. The grid's highest ever peak wheeling capacity of 5, 222 MW was achieved in December 2017 [45]. Moreover, grid collapse is often a recurrent problem. The national grid experienced six total system collapses in the first quarter of 2018 [46]. We have thus provided a workable solution with solar PV offgrid/minigrid plus storage reverse auction to attract private investments and potentially solve the lack of funding and grid constraint/collapse problems.

4.5. Levelized Cost of Energy (LCOE)

The LCOE of a given technology is the ratio of the lifetime costs to the lifetime electricity generation, both of which are discounted back to a common year using a discount rate that reflects the average cost of capital [47]. Appendix 5 explains how the LCOE is calculated.

The LCOE for the 233 selected non-electrified clusters (Appendix 3) range from a low of US\$0.18/kWh in the North to a high of US\$0.25/ kWh in Southern Nigeria. It is noteworthy that, auction results in Dubai, Mexico, Peru, Chile, Abu Dhabi and Saudi Arabia obtained in 2016 and 2017 confirm that the LCOE can be reduced to US\$ 0.03/kWh from 2018 onward given the right conditions [47]. For instance, Dubai

Fig. 6. Map of Nigeria showing the locations of the 340 clusters.

achieved (US\$0.03/kWh), Abu Dhabi (US\$0.024/kWh) and Saudi Arabia (US\$ 0.023/kWh) [48]. Hence, solar PV auction (without storage) have resulted in electricity prices from solar PV equal to almost a fifth of what they were in 2010, reflecting developments in the sector [49].

Based on our model and analysis, we understand the added cost of the battery storage to the solar PV system. Furthermore, we have provided some critical groundwork information to facilitate the auction design for the Nigeria case. Thus, we posit that it is not impossible to expect a well-designed solar plus storage auction to produce prices in the range of US\$0.09-US\$0.12/kWh in Nigeria. This cost will be at the low end of the current grid tariffs and can potentially achieve high quality power supply with some demand side management.

In comparison, the current grid tariff in Nigeria (2018) range from a low of US\$0.07/kWh 9 for LV residential customers in Eko Disco to a high of US\$0.21/kWh for high voltage maximum demand industrial customers in Yola Disco [50] and this power supply is only available at an average of 35.8 h per week [37]. To offset these negative impacts, industrial firms in developing countries often opt for self-generation of electricity, even though it is widely considered a second-best solution [3]. Most private enterprises in Nigeria are forced to resort to self-

generation at a high cost to themselves and the economy at about US \$0.20–0.30/kWh [51]. Therefore, we believe our design is technoeconomically feasible for Nigeria with the right policy support frameworks addressed in the next section.

5. Regulatory limitations to overcome for bidders

With the results obtained from our model and analysis, we have improved understanding of solar PV plus storage auction design for the Nigeria market. Furthermore, we have provided data on the clusters without electricity access as well as the most populated clusters that will have the largest impact on offgrid/minigrid solar PV plus battery storage reverse auction. In addition, we have ascertained the land availability and proved it is a techno-economically feasible potential solution to increase electricity access in Nigeria. In this section, we will discuss how to implement the solution from the market design and regulation viewpoint.

Nigerian Electricity Regulatory Commission Minigrids Regulation [52], is the current minigrid regulation guiding decision making in the Nigeria Power sector. Prospective bidders will read this regulation to make decisions on whether to participate or not in the auction run. This will have direct impact on the competitiveness of the auction. Below, we will discuss the key clauses that need to be amended or repealed in the minigrid regulation.

⁹ Exchange rate conversion of N305.30 to 1USD (Central Official exchange rate) from the website of the Central Bank of Nigeria as at 6th March 2018.

• NERC [52] Section ³ defined "Independent Electricity Distribution Network" or "IEDN″ as distribution network not directly connected to a transmission system operated by the system operator excluding minigrids.

Our proposed offgrid/minigrid solution does not require connection to the transmission system. Therefore, this regulation should be amended. The successful bidders shall become Independent Electricity distribution network operators. Hence, the regulation should be expanded to make allowance for the utility scale offgrid/minigrids.

• NERC [52] Section 4, Clause 1. This regulation shall apply to minigrids with Generation Capacity of up to 1 MW. Within the regulations, the term minigrid is used for any isolated or interconnected minigrid generating between 0 kW and 1 MW of Generation Capacity.

This should be amended to redefine the minigrid capacity range. The generation capacity should not be restricted to an uppermost limit of 1 MW. As shown in this paper, we have identified clusters where isolated utility-scale offgrid/minigrid between 6.45 MW and 92.55 MW can be installed.

• NERC [52] Section ⁵ Clause 2 gives the requirement for a minigrid to have a 'generator' in its network to be operated by a minigrid operator or a third party.

The term 'generator' should be clarified. If it means a fuel (such as diesel) run power supply generator, this regulation should be repealed, as there is no justification to demand a generator for minigrid installation, it should not be a requirement. We have shown in this paper that the minigrid market design is feasible and economically viable without needing a 'generator' in offgrid application.

• NERC [52] Section 6, Clause 3 and 4: A minigrid developer applying for a minigrid permit shall submit to the Commission an accurate description of the proposed distribution and generation system, including geographical depiction.

The accurate description of distribution, generation and geographical depiction of sites should not be the responsibility of the developers that have no hundred percent success guarantee in a bidding process. Otherwise, they may be deterred from participating considering the enormous transaction costs involved in gathering the information. The government should provide the information. The good news is that the effort in this research work has provided some of this critically required information, which the government can make available to prospective developers/bidders. However, this does not absolve the bidders of the responsibility to conduct their due diligence.

• Perhaps, a major regulatory limitation is related to the Distribution licensee's (i.e Discos) expansion plans and minigrid deployment. NERC [52] Section 7, Clauses 1b, c, d, e, f and g, Section 9 and 19 needs to be amended or repealed to allow an efficient development of the minigrid. Based on the Distribution licensee's expansion plans approved by the Commission, the minigrid activities will not interfere with the expansion plans into the designated unserved area of the Discos.

The Discos expansion plans are best on paper as they lack the financial viability to bring them to fruition. Currently, the dilapidated infrastructure of the Discos do not have the capacity to fully accept the loads currently fed to them, hence load rejection is a common occurrence. In addition, publicly available financial statements of some of the Discos show they are consistently making losses since privatization (they have cumulatively made a total loss of over US\$ 2 Billion between

2013 and 2016 – see Appendix 4). This is 42% more than the \$1.42 Billion invested by the Discos to acquire the assets during privatization. Moreover, assessing debt financing for investment is a significant challenge for the Discos as they are unable to provide convincing cashflow projection to the lenders that shows their ability to repay loans. Although, equity funding is an investment option for the Discos to explore, it seems the Disco investors are unwilling to stake in equity considering their recent threat to the government to sell off their business at discounts. According to an investor in Jos Disco *… "You asked me whether we are willing to quit the business. Now, please listen to me and put it down clearly that we bought our distribution company cash down for \$82 m in 2013; we are willing to take \$72 m in 24 h and leave."*¹⁰

Although the government (which has 40% stake) in the Discos is yet to make any investments in any of them since privatization. 11 Its recent plan to invest 72 Billion Naira (US\$ 235.8 Million) as a shareholder loan in all the 11 Discos to upgrade their distribution network infrastructure is a welcome development.¹² This is in addition to the ongoing N702 Billion (US \$ 2.3 Billion) government payment guarantee support (January 2017–December 2018). The support is to cover the shortfall arising from the lack of cost reflective tariffs. It is paid directly through $NBET¹³$ to the Gencos and gas companies to guarantee meeting their obligations. Besides, most Discos have received some of their share of the N 213 Billion (US\$ 1.07 Billion) Nigeria Electricity Market Stabilisation Funds (NEMSF)/Power intervention loan. 14

It is noteworthy that the case of fund diversion has been alleged against some DISCO.¹⁵ A case in point is $IBEDC¹⁶$ whose board of directors were suspended for misappropriating the sum of 6 Billion Naira (US\$19.6 Million from the NEMSF loan meant to improve its networks and reduce aggregate technical, commercial and collection losses and diversion of same to its shareholder company IEDMG.¹⁷ IBEDC is yet to refund the money in line with the agreed terms with the Regulator Order of September 2017.¹⁸ It should be enlightening to see the result of the proposed forensic audits of the DISCOs to understand the utilization of the funds received from the government post-privatization till date.¹⁹

Furthermore, the government Ministries, Department and Agencies (MDAs) allegedly owe debts in unpaid electricity bills to the DISCOs have been verified as N 27 Billion Naira (US\$ 88.4 million). The government has approved that the debt should be deducted from the current debts owed by the DISCOS to NBET. NBET shall then pay the equivalent sum to

 $^{\sf 15}\rm http://www.nercng.org/index.php/media-library/press-releases/568 ^{\sf 15}\rm http://www.nercng.org/index.php/media-library/press-releases/568$ [nerc-suspends-board-of-directors-of-ibadan-disco](http://www.nercng.org/index.php/media-library/press-releases/568-nerc-suspends-board-of-directors-of-ibadan-disco).

¹⁶ IBEDC is Ibadan Electricity Distribution Company Plc.

¹⁰ [https://punchng.com/fg-not-afraid-of-discos-threat-to-resell-firms/.](https://punchng.com/fg-not-afraid-of-discos-threat-to-resell-firms/)

 11 The total amount invested by the DISCOs to acquire 60% stake during the privatization was US\$1.42 Billion. The Discos were valued at US\$2.37 Billion. The Government 40% share was US\$ 946 Million.

¹² [https://www.thisdaylive.com/index.php/2018/07/31/fg-approves-tcn-to](https://www.thisdaylive.com/index.php/2018/07/31/fg-approves-tcn-to-manage-n72bn-planned-investment-in-power-discos/)[manage-n72bn-planned-investment-in-power-discos/.](https://www.thisdaylive.com/index.php/2018/07/31/fg-approves-tcn-to-manage-n72bn-planned-investment-in-power-discos/)

 13 NBET is Nigeria Bulk Electricity Trading Plc – the institution coordinating transactions between the Gencos and Discos.

¹⁴ The Nigeria Electricity Market Stabilisation Funds (NEMSF) was a loan facility availed to the DISCO and other market players to cater for the debts owed by the privatized PHCN to the generation and gas supply companies for the energy and gas supply prior to the privatization in 2013. It also covers the market shortfall for the non-cost reflective tariffs MYTO 2.0 until January 2015 before the commencement of the transitional market.The total deficit was 213 Billion Naira (US\$1.07 Billion at the exchange rate 163 Naira/1US\$) in December 2014 when it was finalized, and it was designed to fully pay off the deficit [4].

¹⁷ IEDMG is Integrated Energy Distribution and Marketing Group (IEDMG) Ltd.

¹⁸ [http://www.nercng.org/index.php/media-library/press-releases/525](http://www.nercng.org/index.php/media-library/press-releases/525-nerc-fines-ibedc-n50-million) [nerc-fines-ibedc-n50-million](http://www.nercng.org/index.php/media-library/press-releases/525-nerc-fines-ibedc-n50-million).

¹⁹ [https://www.businessdayonline.com/exclusives/article/nerc-unveils-plan](https://www.businessdayonline.com/exclusives/article/nerc-unveils-plan-tackle-liquidity-gaps-power-sector/)[tackle-liquidity-gaps-power-sector/](https://www.businessdayonline.com/exclusives/article/nerc-unveils-plan-tackle-liquidity-gaps-power-sector/).

the GENCOs.²⁰ Moreover, the government has recently approved funds to the Discos through a loan facility of N37bn (US\$ 121 Million) to assist in closing the metering gap. By October 2018, the Discos are expected to assess the fund to contract third party investors in a bidding process to finance the procurement of meters. However, it remains to be seen if this initiative will achieve the desired result.

In a nutshell, while the government seems to be making some efforts to address the sectoral liquidity issues, refurbish some dilapidated infrastructure and to resolve the metering problems. It appears the Discos can barely survive further in business (as material uncertainty exists that cast significant doubts on their ability to continue as a going concern). This opinion was unanimously expressed by their auditors PWC, KPMG, EY etc. in their financial statement). Therefore, the Discos should focus on solving their technical and financial challenges in their current operational areas in centralized generation and give room for other private players in decentralized generation in unserved areas. This will enable the centralized and decentralized generation to effectively co-exist. As the threat of grid expansion remains a major uncertainty for the investors, any assurance in this respect can improve the investment prospects [53].

On this basis, these potential investment show-stopper clauses 7, 9 and 19 and their accompanying annexes should be amended. The Commission has the power to amend or repeal, in whole or in part the provisions of the regulation as contained in Section 26 of the Regulation NERC [52]. Moreover, Section 71 (6) of the primary legislation, Electric Power Sector Reform Act EPSRA Act [54] on the terms and conditions of licenses clearly shows that exclusivity was not intended for Discos licensees as follows: "*unless expressly indicated in the license, t*he grant o*f a license shall not hinder or* restrict the grant of a *license to another person for a like purpose and, in the absence of such an express indication, the licensee shall not claim any exclusivity, provided that the commission may allow a licensed activity to be exclusive for all or part of the period of the license for a specific purpose, for a geographical area, or for some combination of the foregoing"*. Besides, there seems to be no official record till date that shows any Disco has been granted exclusivity to an unserved area. Therefore, the Regulator should amend these clauses.

Similarly, the transmission expansion plan [55] should focus on projects to refurbish the dilapidated transmission network infrastructure that causes the frequent national grid collapse (total and partial blackout) problems instead of the grid expansion projects.

6. Policy implications

6.1. Solar PV minigrid auction to attract investment and increase electricity access

Minigrid auction with solar PV plus storage is a workable scenario and a reasonable path forward to attract investment considering the current financial constraints bedevilling the Nigeria power sector. It is noteworthy that the three tariff increase scenarios proposed by the Government/World Bank's team in the Power Sector Recovery Program (PSRP) framework were not implemented. The only option left in the framework is to increase the tariff in July 2019 while the government supports the sector with US\$7.5 Billion.

In the best-case scenario, where the government provides this fund and is able to increase tariff in July 2019, the grid can be stabilized to provide about 4,000 MW of electricity by refurbishing the dilapidated infrastructure to address the frequent grid collapse problems and 5500 MW by 2021 [56].

Therefore, solar PV plus storage minigrid auction can attract investment and improve electricity access through decentralized generation competitively as shown in this paper. Our thoroughly researched shortlist of 233 non-electrified consumer clusters will provide 3,280 MW with expected high socio-political acceptability as it covers all states (except Lagos) in Nigeria.

6.2. Strengthening the institutional framework

Considering the depth of regulatory concerns, strengthening the regulatory framework will improve overall market performance and restore confidence to the sector [14]. Critical to an enabling environment are both the policies on the books and the effectiveness of their implementation [57]. Existence, scope and monitoring of officially approved electrification plans, utility transparency, monitoring and creditworthiness [57] are good starting points to strengthen the institutional framework in Nigeria.

6.3. Capacity building for sustainability

The sustainable management of a renewable energy project after its commissioning is an important aspect. Numerous implemented projects in Sub-Sahara Africa have failed to live up to their promises because effective management method/maintenance plans were not designed [58]. To ensure sustainability²¹ of off-grid solutions in the long-term, the entire supply chain should be developed and properly supported. A local ecosystem should be developed for offgrid electrification activities, including local manufacturing and assembly capacity, ancillary after-sales service system, a pool of trained technicians, and demand creating services [53].

Current efforts at the National Power Training Institute of Nigeria (NAPTIN) through the six months technical skills acquisition program $(NTSAP)^{22}$ for technicians, craftsmen, artisans etc., the one-year graduate skills development programs $(NGSDP)^{23}$ for engineers and the Solar PV (SPVI, 24 SPVIS, 25 MGD²⁶ training courses) in collaboration with the AFD and IFC is commendable. Nevertheless, there is a need for an upgraded training designed for utility scale solar PV plus storage installation and design (particularly on instrumentation, automation/ control and power system engineering). In addition, there is also a need for the government to fund some trainings in a sustainable way (for instance, the NGSDP is usually self-financed by the applicants except when they receive private sector scholarship). This will empower more people to meet the skills requirements of the sector and enhance sustainable solutions. Finally, to facilitate the extensive development of solar PV in Nigeria, trends across the country show that efforts should be improved towards education through increased awareness [59].

7. Conclusion

This paper contributes to improving the economic, institutional and technical challenges in the Nigeria power sector through the lens of market design and regulation. We combined GIS at a high resolution

²⁰ [https://www.thenigerianvoice.com/news/263279/communique-of-the-](https://www.thenigerianvoice.com/news/263279/communique-of-the-24th-monthly-meeting-of-the-honminister-o.html)[24th-monthly-meeting-of-the-honminister-o.html](https://www.thenigerianvoice.com/news/263279/communique-of-the-24th-monthly-meeting-of-the-honminister-o.html).

 21 Thousands of youths and educators should be enrolled in training programs that provide hands-on experience in the design, installation, testing, operation and maintenance to acquire the skills and competencies required in the solar industry to create a sustainable pool of skilled workforce in the entire value chain. Likewise, training programs should include technical and policy training for professionals and decision makers in the sector.

 22 NTSAP means National Technical Skills Acquisition Program. It is a 6 months government sponsored program to train line maintenance technicians, distribution substation operators, cable jointing, electrical maintenance and fitters, electrical marketing and meter management technicians.

 23 NGSDP is a one year Electrical/Mechanical Engineers graduate skills development program.

 24 SPVI means Solar PV Installation training couse. It is a 3 week (120 h course).

²⁵ SPVIS means Solar PV installer course. It is a 3 week (120 h course).

²⁶ MGD means Solar PV Minigrid Design Course. It is a 4 week (160 h course).

with energy system optimization tools to bridge the knowledge gaps in the literature and to provide the critically needed information (at the administrative levels) to enhance decentralized offgrid reverse auctions with solar power plus storage in Nigeria.

We provide the consumer locations without electricity access with their breakdown at administrative decision-making levels (federal, 36 States plus FCT and local Governments of Nigeria). Thereafter, we analysed the most populated clusters that provide the most impact on solving electricity access problem in Nigeria with minigrid auction. Thereafter, we performed the load demand assessment and technoeconomically optimized the solar PV plus battery capacities for the selected clusters to achieve high quality power supply with some demand side management.

Furthermore, we determined the land requirements and ascertained the availability of the land at the clusters to derive a final shortlist of 233 clusters covering 7.2 million people requiring 3280 MW solar PV and 7,518 MWhr battery capacities as the best locations for minigrid auctions in Nigeria. In addition, we showed it is a competitive solution with an LCOE from a low of US\$0.18/kWh in the North to a high of US \$0.25/kWh in Southern Nigeria and argued that it is not impossible to achieve competitive auction prices of US\$0.09-US\$0.12/kWh in Nigeria.

Besides, we discussed the regulatory limitations to overcome to make our proposed minigrid auction design adaptable to the Nigeria market. This centers on the need to amend or repeal specific sections and clauses in the current minigrid regulation [52]. Finally, we

Appendix 1. : Non-Electrified Clusters Population Scaling

provided the policy implications and guidelines to decision makers in the Nigeria power sector as follows. i. Solar PV plus storage minigrid auction can attract investment and improve electricity access through decentralized generation competitively. ii. Strengthening the institutional framework and iii. Capacity building for sustainability.

A limitation of this research is the ease of replicability. This work takes an interdisciplinary approach and has been specifically designed for Nigeria. Therefore, it cannot be replicated on the fly for another country. Furthermore, the determination of population and load profiles follows a simulation approach that may over or underestimate the results depending on the quality of input parameters. Hence, there is a need for physical site visit to the selected clusters to ascertain their current state before implementation of the auction. Thus, the attempt in this paper is by no means exhaustive.

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APPENDIX 2. : Breakdown of Non-Electrified clusters at the States and Local Government Levels

Akwa

Akwa
Akwa

Akwa

Akwa
Akwa

Akwa

Akwa

Akwa

Akwa

Akwa
Akwa

Akwa

Akwa
Akwa

 $\begin{array}{c} 6 \\ 13 \end{array}$

2

 $\begin{array}{c} 4 \\ 11 \end{array}$

2

 $\frac{4}{2}$

 $\begin{array}{c} 3 \\ 12 \end{array}$

6

3

 $\begin{array}{c} 1 \\ 13 \end{array}$

6

 $\begin{array}{c} 5 \\ 10 \end{array}$

2

9
34

 $\begin{array}{c} 2 \\ 10 \end{array}$

2

 $\begin{array}{c} 1 \\ 13 \end{array}$

2

 $\begin{array}{c} 1 \\ 100 \end{array}$

Jigawa

Jigawa

Jigawa

Kaduna

Kaduna

Kano

Katsina

Katsina Katsina

Katsina Katsina

Katsina Katsina
Kebbi

Kogi

Kogi
Kogi

Kwara

Kwara
Kwara

Kwara
Kwara

Kwara Kwara
Lagos

Lagos

Lagos
Lagos

Lagos

Lagos

Niger
Niger

Ogun
Ogun

Ondo
Ondo

Ondo
Osun

Osun

Osun
Osun

Osun
Osun

Osun
Osun

Osun

Osun

Osun
Osun

Osun
Osun

Plateau

Appendix 3. : Results of 233 techno-economically optimized clusters (PV and Battery sizes, LCOE and Land Requirements)

Appendix 4

Author's computation from the analysis of the publicly available financial statement of Discos (2013–2016). Exchange rate 1 USD = 305.3 Naira.

Appendix 5

List of techno-economic Simulation Assumptions.

• Generic 1Mwhr Lithium-ion battery

Nominal Capacity (Ah) = 1670. Nominal Voltage $(V) = 600$. Lifetime = 15 Years. Capital $cost = $700,000$. O and $M = $10,000/Y$ ear. Initial state of charge $= 100\%$ Minimum state of charge = 20% Throughput (kwhr) = $3,000,000$. Roundtrip Efficiency = 90% Maximum Charge current $(A) = 1670$. Maximum Discharge current $(A) = 5000$.

• Generic flat plate PV

Lifetime = 25 Years. Capital $cost = $1/Watt$. O and $M = 1\%$ of Capital Cost. Derating Factor = 80%

• Generic large free converter

Inverter Input. Lifetime = 15 Years. Efficiency = 95% Rectifier Input. Relative Capacity = 100% Efficiency = 95%

• Load Characteristics

Community load with peak evening hours demand. Random Variability: Day-to-Day = 10%; Timesteps = 20%

• Cluster Project Assumptions

Project lifetime: 25 Years. Discount rate: 6% (based on provision of sovereign/development partners guarantee for risk mitigation). Inflation Rate: 2%

Land assumed to be freely provided by the state and local governments.

Annual Capacity constraint: 0%, 5%, 10%, 15% and 20% sensitivity scenarios.

Cluster specific Solar Irradiation: NASA Surface meteorology and Solar Energy, horizontal radiation, monthly average values over 22 Years, available in HOMER software.

Cluster specific Ambient temperature: NASA Surface meteorology and Solar Energy, Air temperature, monthly average values over 22 Years, available in HOMER software.

The formula used for calculating the LCOE of is:

= *t* n $I_t + M_t + F_t$ $1 \quad (1+r)^t$ $n = 1$ $\frac{E_t}{(1+r)^t}$

Where:

LCOE = the average lifetime levelised cost of electricity generation.

 I_t = investment expenditures in the year t.

 M_t = Operations and maintenance expenditures in the year t.

 F_t = Fuel expenditures in the year t.

 E_t = Electricity generation in the year t.

r = Discount rate; and.

 $n =$ Life of the system.

APPENDIX 6

Consumer Cluster with Nightlight Emission and Electrified Schools (in purple).

SOLAR RESOURCE MAP OF NIGERIA.

Map Source: <https://solargis.com/maps-and-gis-data/download/nigeria/>

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