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Justice in the Energy Transition: State Capacity and the Politics of Critical Infrastructure in Nigeria

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Abstract

Energy transitions in resource-dependent states are governance problems as well as technical ones. This article examines how Nigeria’s Mission 300 National Energy Compact and its updated Nationally Determined Contribution 3.0 conceptualise and operationalise justice, and how domestic dynamics shape whether justice is delivered. Drawing on energy justice scholarship, the political economy of rentier states, and the literature on state capacity, the article argues that the two programmes are best understood as products of different institutional lineages: one rooted in electricity-sector reform and investor-oriented stabilisation, the other in climate governance and vulnerability discourse. Using a comparative reading of both policy documents alongside governance and sector data, the analysis shows that both programmes only articulate justice rather than institutionalise it. Mission 300 prioritises grid reinforcement, loss reduction, metering, subsidy reform, and private-sector mobilisation, while offering few mechanisms for affordability, participation, or the protection of vulnerable groups. Nationally Determined Contribution 3.0 recognises gendered burdens, spatial inequality, and climate vulnerability, but provides limited instruments to embed these concerns in electricity-sector reform. The article concludes that Nigeria’s transition produces injustice not by design but through an inherited and fragmented governance structure. Addressing it requires treating justice as a design constraint, building coordination across federal and state government, and sequencing reform so households experience benefits alongside costs rather than long after them.

Keywords

electricity; justice; Mission 300; Nationally Determined Contribution; Nigeria; resource dependence; state capacity

1. Introduction

Energy transitions in resource-dependent states are shaped by technological choices, political incentives, institutional constraints, and distributive consequences. Scholarship on energy justice emphasises that transitions often reproduce existing inequalities unless distributive, procedural, and recognition dimensions are explicitly embedded in policy design (Jenkins et al., 2016). Research shows that low-carbon reforms can shift adjustment costs onto vulnerable households, particularly when tariff restructuring and subsidy withdrawal occur without targeted safeguards (Sovacool et al., 2017). These concerns are acute in resource-dependent states, where oil and other resource rents shape state incentives, institutional development, and reform coalitions, not just the structure of exports (Osunmuyiwa et al., 2017). In such settings, energy reforms are filtered through rent-seeking, clientelism, and elite contests over control of infrastructure and revenue, so that fiscal volatility, entrenched fossil-fuel interests, and institutional fragmentation complicate long-term planning and public accountability. Resource dependence matters here because it can slow low-carbon change and because it shapes who benefits from reform, which institutions gain power, and which transition pathways last.

Despite Nigeria's oil wealth, it has the largest electricity access deficit in the world, with roughly 86 to 90 million people living without electricity (World Bank, 2025). Only about 53.6 percent of households nationwide have access to electricity, and the gap between regions is stark: The south-east records around 74.6 percent access while the north-east trails at 29.5 percent, and urban access of 82.2 percent dwarfs the 40.4 percent recorded in rural communities (Chibundu, 2026). The Nigerian grid is fragile, having collapsed 12 times in 2024 and repeatedly again in 2025, and rarely carries more than six gigawatts for a population approaching 230 million (Intelpoint, 2024).

The federal government has adopted the Mission 300 National Energy Compact, developed under a World Bank Group and African Development Bank (AfDB)-led initiative that is partly financed by both institutions and aims to connect 300 million people in sub-Saharan Africa to electricity by 2030. In Nigeria, the Compact seeks to expand electricity access, accelerate decentralised renewables, stabilise the grid, and mobilise USD 15.5 billion in private investment (Federal Government of Nigeria, 2024). Its measures include metering expansion, loss reduction, transmission upgrades, clean cooking targets, and subsidy reform. It largely assumes a federal delivery model just as the electricity sector is moving toward decentralised state-level regulation.

The Electricity Act 2023 authorises states to establish their own electricity markets, producing divergent regulatory practices across subnational governments with very different administrative capacities and fiscal resources (Federal Republic of Nigeria, 2023). Legal analysis of the Act describes a substantial shift from centralised regulation toward a decentralised framework in which states can create their own markets and regulators, opening space for renewable obligations and state-specific design, but contingent on technical competence, regulatory maturity, and fiscal capacity that are unevenly distributed (Adeyemi, 2024). The literature on just transitions underscores that institutional design and state capacity are central to whether reforms advance equity or entrench disparities (Healy & Barry, 2017).

Mission 300 operates alongside Nigeria's updated Nationally Determined Contribution (NDC) 3.0, which foregrounds principles of a just transition, climate vulnerability, subnational inequality, and the need for

stronger institutional coordination (Federal Ministry of Environment, 2025). Although both are programmes of the Nigerian government, they come from different institutional lineages. Mission 300 centres on electricity-sector reform, infrastructure stabilisation, and investor-oriented implementation, and is developed through the federal government's compact process under the AfDB- and World Bank-led Mission 300 initiative (Federal Government of Nigeria, 2024). NDC 3.0 is a product of climate governance, prepared by the Federal Ministry of Environment and tied to vulnerability discourse and cross-sector planning as part of the Paris Agreement. This reflects a wider literature on why justice concerns visible in climate language can become diluted when translated into implementation frameworks for electricity reform (Edomah et al., 2021; Koblowsky & Ifejika-Speranza, 2012; Malley et al., 2021).

This raises the article's central research question: How do the Mission 300 Compact and Nigeria's NDC 3.0 conceptualise and operationalise justice, and how do domestic governance dynamics shape their ability to deliver an equitable energy transition? The article argues that the two programmes conceptualise justice very differently, Mission 300 treating it as a by-product of technical reform and NDC 3.0 naming vulnerability and inequality directly, but that both fail at the same point: Neither builds distributive, procedural, and recognition concerns into implementation. Justice is stated across the policy documents but barely embedded in the rules, sequencing choices, and governance arrangements that shape outcomes. These gaps are simultaneously current policy failures and they are rooted in a layered governance structure built up over time through reforms designed for different purposes, and made worse by a decentralisation reform that leaves uneven state capacity to decide who bears the costs of transition and who gets its benefits.

The rest of the article proceeds as follows. The next section develops the conceptual framework and its eight justice dimensions, followed by a note on approach and sources. The article then situates Mission 300, NDC 3.0, and the Electricity Act 2023 within the history of Nigeria's electricity governance, before the comparative analysis applies the eight dimensions to each framework. A discussion section explains how the inherited governance configuration produces these deficits, and the conclusion draws out implications for decentralising, resource-dependent states.

2. Literature Review

2.1. *Energy Justice in a Resource-Dependent State*

The most widely used energy justice framework remains the triad of distributive, procedural, and recognition justice (Jenkins et al., 2016; McCauley et al., 2013). Distributive justice concerns how costs, benefits, and risks are allocated across groups and places. Recognition justice asks whose needs and vulnerabilities are seen. Procedural justice concerns whether affected groups can shape the decisions that govern energy systems (Jenkins et al., 2016). This framework in the literature also argues for a whole-systems view, in which justice is assessed across production, transmission, distribution, consumption, and waste rather than only at the point of access. That systems perspective matters for Nigeria, where the burdens of transition are spread across tariff policy, grid reliability, off-grid markets, fuel use, and the costs of new energy infrastructure.

A second move is to spatialise justice. Work on spatial energy justice shows that vulnerability is not only social but geographic: Infrastructure deficits, affordability pressures, and misrecognition can cluster in particular

regions and become self-reinforcing (Bouzarovski & Simcock, 2017). This is directly relevant to Nigeria, where electricity access, climate vulnerability, and state capacity are unevenly distributed across states and regions. A national policy can therefore widen inequality even as it raises aggregate access, if investment, regulatory competence, and political attention concentrate in already advantaged places.

These tenets sit within the broader concept of the just transition, which links decarbonisation to distributive and procedural fairness and insists that the move to a low-carbon economy should reduce rather than reproduce social inequality (Heffron & McCauley, 2018). The term is often invoked loosely, with policy documents committing to a transition that is low-carbon without specifying what makes it just, and Heffron and McCauley argue that energy, environmental, and climate justice should be understood as parts of a single framework rather than separate concerns. Later work develops this from theory toward practice, setting out five forms of justice—distributive, procedural, recognition, restorative, and cosmopolitan—applied across the energy life-cycle from extraction to waste, and treating justice as something institutions enforce through rules and decisions rather than a normative overlay added after reform is designed (Heffron, 2022). This framing matters for the Nigerian case in two ways. It supplies the restorative tenet, concerned with redress for harms already done, which the article applies to both frameworks; and its insistence that justice depends on the rules institutions actually enforce anticipates the article's central distinction between articulated and institutionalised justice.

Recent Nigeria-specific work confirms that justice gaps lie less at the level of policy rhetoric than at the level of implementation. A study of renewable energy transition in Nigeria finds that policy documents often articulate justice aspirations, but participation is commonly tokenistic, benefits are uneven, and reparative mechanisms are weak or absent (Amaefule et al., 2026). That study extends the core triad with restorative justice, arguing that transitions should not only avoid new harms but address displacement, land disputes, and cumulative environmental burdens. This is central to an article arguing that justice is not an automatic by-product of technical reform, and it provides the grounding for the additional justice dimensions developed in the justice in practice and discussion sections.

2.2. Resource Dependence and the Political Economy of Transition

Energy transitions are shaped by political settlements, institutional structures, and power relations, not solely by technology (Newell & Mulvaney, 2013). State-centred accounts emphasise that governments mediate distributive conflict and determine whether reforms advance or undermine equity (Routledge et al., 2018). This is directly relevant to Nigeria, where both Mission 300 and NDC 3.0 position the state as the central architect of transition while relying on market mechanisms and private investment to deliver outcomes. The Nigerian state is expected to coordinate reform and protect vulnerable groups, but risks reproducing inequality when fiscal imperatives or elite interests dominate policy design.

Resource dependence sharpens this. Work applying socio-technical transition theory to rentier states argues that standard transition models must be reworked because regime dynamics are strongly shaped by political elites and patron–client relations (Osunmuyiwa et al., 2017). In Nigeria, oil rents shape reform coalitions and the incentives of institutions, so that the question is less whether low-carbon change is technically feasible than whose interests it serves and which institutions it empowers. This dynamic does not disappear as the energy mix shifts. Rentier logics can carry into low-carbon markets, where the rents once captured through

control of fossil-fuel allocation reappear in the allocation of renewable concessions, mini-grid subsidies, import licences for solar equipment, and donor-financed electrification contracts. The question of who captures these new streams is as political as the older contest over oil, and the entrenched interests built around fossil-fuel supply have both incentive and capacity to shape, slow, or capture the transition rather than be displaced by it. Reading the transition through this lens guards against the assumption that decarbonisation neutralises the rentier political economy; more often it reroutes it.

Political economy perspectives further highlight how incumbency, rent distribution, and institutional fragmentation shape transition trajectories. Energy transitions unfold through political struggle, with winners and losers determined by coalitions seeking to defend or reshape existing arrangements (Healy & Barry, 2017). Mission 300's emphasis on tariff reform, loss reduction, and utility stabilisation responds to chronic liquidity crises among distribution companies, yet these reforms are politically sensitive because of their household cost implications, and subsidy reduction has repeatedly met organised resistance. At the same time, reliance on private-sector mobilisation creates incentives for developers to concentrate investment in commercially viable states, reinforcing regional inequality, an outcome NDC 3.0 explicitly flags.

2.3. State Capacity and Multilevel Implementation

If resource dependence sets the political terms of transition, state capacity sets the conditions under which policy can be carried through. The literature on state capacity underscores why reform objectives that are clearly articulated nationally are inconsistently implemented in practice: Uneven administrative capacity at subnational levels produces divergent outcomes even where goals are shared (Soifer, 2013). This is particularly salient under the Electricity Act 2023, which devolves regulatory authority to states of widely varying institutional maturity, technical expertise, and fiscal resources. Work on electricity federalism in Nigeria states the problem starkly: Formal legal powers do not guarantee that states have the wherewithal to build robust electricity systems (Herbert, 2021). Decentralisation is not self-executing; its effectiveness depends on competence, regulatory maturity, and fiscal capacity at state level (Adeyemi, 2024; Herbert, 2021).

Empirical evidence suggests the risk is substantial. A nationwide assessment of climate governance across Nigerian states finds that only a small minority have climate policy documents, fewer still have dedicated budget lines, cross-sectoral coordination is weak, and subnational uptake of national commitments is often more symbolic than operational (Okereke et al., 2025). This does not make multilevel governance impossible, but it means implementation capacity is highly uneven and cannot be assumed. Newell and Mulvaney (2013) argue that transitions in fossil-fuel-dependent political economies face structural constraints that technical reform alone cannot resolve, and that just transitions require deliberate mechanisms to redistribute risk and protect vulnerable groups. Markkanen and Anger-Kraavi (2019) similarly show that transitions impose uneven adjustment costs across workers, regions, and income groups, particularly when reforms affect prices, employment, and access to essential services.

Taken together, these strands of literature suggest that energy justice in Nigeria is not an ancillary concern to be addressed after technical reforms are designed. It is a constitutive dimension of transition governance, shaped by rentier political economy and conditioned by uneven state capacity. Assessing the transition therefore requires examining not only whether access expands or infrastructure improves, but whether

institutional arrangements embed affordability, participation, recognition, and protection against cumulative and spatially concentrated vulnerability. This provides the foundation for the institutional analysis that follows.

3. Approach and Sources

The article uses a comparative document analysis of Nigeria's two principal energy-transition frameworks, the Mission 300 National Energy Compact (Federal Government of Nigeria, 2024) and the third Nationally Determined Contribution, NDC 3.0 (Federal Ministry of Environment, 2025), read against the statutory framework established by the Electricity Act 2023. These two documents represent some of the most authoritative current statements of federal intent on electricity access and decarbonisation respectively. They were produced within a short window of one another, and they originate from different parts of the same federal government, which makes them well suited to a comparison of how justice is framed across institutional lineages.

Each document is read against the dimensions of justice developed in the literature review section. Rather than coding for the presence or absence of the word justice, the analysis asks, for each dimension, what the document proposes, what mechanism it specifies for delivery, and what it leaves unaddressed. This distinction between articulation and operationalisation is the analytical core of the article: A commitment that is stated but not attached to an instrument, a budget line, a responsible authority, or an enforceable rule is treated as articulated rather than institutionalised.

The comparison is then situated within secondary evidence on the sector, including governance and stakeholder analyses, legal commentary on the Electricity Act, sector regulator data, and recent reporting on tariff reform, access figures, mini-grid deployment, and clean cooking. This triangulation guards against taking either document's self-description at face value and allows the analysis to assess stated commitments against observable implementation conditions. The approach is interpretive rather than causal: It establishes how justice is framed and where the framing breaks down at the point of delivery, not the magnitude of any single reform's distributive effect, which would require household-level data beyond the scope of this article.

4. The Institutional and Historical Context of Nigeria's Energy Governance

A persistent weakness in policy-focused analyses of Nigeria's transition is a presentist reading that treats current governance problems as contemporary failures rather than inherited structures. Edomah (2021) attempts to correct this through historical analysis. This work shows that Nigeria's electricity sector developed through three broad phases: an early colonial period of fragmented provision for administrative and extractive purposes; a postwar and post-independence phase of direct state intervention and centralisation; and a market-reform phase from 2005 onward centred on unbundling, regulation, and privatisation. In this context, current governance problems are the outcome of successive institutional settlements built for different goals: colonial control, state-led industrialisation, and later market efficiency. The movement from the Nigerian Government Electricity Undertaking to the Electricity Corporation of Nigeria, then to the Niger Dams Authority and National Electric Power Authority, and later to the unbundled post-Electric Power Sector Reform Act market, did not produce a stable governance architecture. Edomah (2021) finds that it shifted the sector from a centralised public monopoly to a fragmented field of regulators,

generation firms, transmission actors, distribution companies, rural electrification agencies, donors, and subnational actors. Present justice deficits are rooted in this inherited structure, not only in current policy design.

Work on policymaking adds detail on how governance failure is produced. Policymakers shape energy infrastructure through three main levers—licensing, regulation, and control over access to data—and the policy process is often disjointed rather than cyclical, with weak links between agenda setting, implementation, and evaluation (Edomah et al., 2016). This matters for a justice analysis because affordability safeguards, recognition of vulnerable groups, and participatory procedures all depend on institutions able to carry policy through coherent cycles rather than issuing aspirational commitments that break down at implementation. The same work links institutional design to corruption, over-centralisation, and distorted development priorities, with infrastructure decisions shaped less by domestic need than by export orientation, political power, and the management of oil-fuelled expectations (Edomah et al., 2016). A major review of the 2005 power sector reform reinforces this: Privatisation and unbundling were introduced to remedy chronic failure, but implementation has been constrained by overlapping mandates, weak regulation, fiscal stress, gas-to-power bottlenecks, and recurrent political interference (Ogunleye, 2016).

This literature helps resolve a question about price-based reform that recurs throughout the analysis. The point is not that sector stabilisation and affordability are inherently incompatible. Rather, tariff reform and cost-reflective pricing become socially regressive when pursued in a system with poor service quality, weak metering, low incomes, and limited compensatory protection (Ogunleye, 2016; Sesan et al., 2024). The central issue is not the goal of financial stabilisation itself, but the institutional and political conditions that shape its implementation and distributive effects. The fiscal pressure behind these reforms is real: Tariff shortfalls, the gap between the cost of generation and the revenue collected, rose from around ₦140 billion in 2022 to nearly ₦1.9 trillion in both 2024 and 2025, and in 2026 Nigeria and the World Bank cancelled roughly USD 718 million in undisbursed power-sector funding after reform targets were missed (Omolu, 2026). The diagnosis that the sector is financially unsustainable is therefore accurate. What the historical and political economy literature adds is that pursuing cost recovery through the existing institutional channels, without compensatory protection, predictably transfers the adjustment onto households least able to absorb it.

The governance field is also densely populated and externally shaped. Governance is distributed across generation companies, the Transmission Company of Nigeria, distribution companies, the Nigerian Electricity Regulatory Commission (NERC), the Rural Electrification Agency, and a large set of donor and multilateral actors. External actors such as the World Bank, AfDB, Deutsche Gesellschaft für Internationale Zusammenarbeit, and Japan International Cooperation Agency do more than finance infrastructure; they shape market design, regulatory reform, and intervention priorities through grants, loans, technical assistance, and programme conditionalities (Edomah et al., 2021). This is essential for interpreting Mission 300, which is itself a joint AfDB and World Bank initiative. Where donor and multilateral organisations exert strong influence while domestic coordination remains weak, policy documents may reflect several institutional logics at once: fiscal stabilisation, investor confidence, development co-benefits, energy access, and climate commitments (Edomah et al., 2021). Network analysis reinforces this, showing that stakeholder relations are denser and more regulated in the centralised grid space, while decentralised systems have looser networks in which a smaller group of actors, including the Rural Electrification Agency and

international development agencies, can drive interventions with less embedded coordination (Edomah, 2023). This helps explain why off-grid and decentralised initiatives may scale quickly while remaining weakly integrated into any broader justice-oriented governance strategy.

The climate governance literature adds a final layer that bears directly on the difference between the two documents. Nigerian climate policy has been marked by long-running contestation over where climate coordination should sit, particularly between the Federal Ministry of Environment and proposals for a more central commission reporting closer to the presidency, a contest reflecting competing understandings of authority and political leverage (Koblowsky & Ifejika-Speranza, 2012). Integration of climate mitigation with development priorities works best when mitigation is embedded in sector planning and budget processes and when cross-ministerial engagement is structured rather than ad hoc (Malley et al., 2021). Together these studies support the article's framing: The divergence between Mission 300 and NDC 3.0 reflects not only different ideas about justice but distinct institutional lineages and mandates. This is an inference from the governance literature rather than a documented claim about the drafting of Mission 300 itself (Edomah et al., 2021; Koblowsky & Ifejika-Speranza, 2012; Malley et al., 2021).

Within this inherited and fragmented field, the Electricity Act 2023 pushes longstanding tensions into a sharper federal-state form. By enabling states to establish their own markets and regulators, it can in principle improve responsiveness to local conditions and widen opportunities for renewable integration (Adeyemi, 2024). The Act provides that where a state has not established its own regulatory authority, NERC continues to regulate within that state, an arrangement that formally preserves continuity but in practice makes the pace and quality of devolution depend on each state's capacity to stand up a functioning commission. By mid-2026, a number of states had enacted their own electricity laws and begun establishing regulatory authorities, while many others had not, so that the regulatory map is now a patchwork of devolved and federally retained jurisdictions. Because the Act's effectiveness depends on capacities that are unevenly distributed, it makes uneven state capacity more consequential for the distribution of transition benefits and burdens (Herbert, 2021; Okereke et al., 2025; Sesan et al., 2024). It is against this backdrop that the comparative analysis of Mission 300 and NDC 3.0 should be read.

5. Justice in Practice: A Comparative Analysis of Mission 300 and NDC 3.0

This section details the findings on how justice is operationalised by comparing the design and implementation logic of the two programmes. The dimensions in Table 1 build directly on the conceptual framework. The distributive, procedural, and recognition rows correspond to the core energy justice triad (Jenkins et al., 2016); the restorative row follows Amaefule et al.'s (2026) extension of that triad to displacement, land, and cumulative harm; the spatial row derives from work on spatialised energy justice (Bouzarovski & Simcock, 2017); and the institutional, temporal, and labour rows operationalise the state capacity and political economy literatures developed in the literature review section (Markkanen & Anger-Kraavi, 2019; Newell & Mulvaney, 2013; Soifer, 2013). The dimensions are derived from the theoretical discussion rather than assembled ad hoc. This matters especially for sequencing, which refers here to the order and timing of reforms, including whether protections and benefits are introduced before, alongside, or only after households face new costs.

Table 1. Justice analytical framework applied to Mission 300 and NDC 3.0.

Dimension	Energy Justice Lens	What Mission 300 Does	What NDC 3.0 Adds	Combined Gaps/Risks in Nigeria
Distributive	Who bears costs and who gains; affordability, subsidy, and tariff impacts.	Pushes cost-reflective tariffs; reduces subsidies; focuses on utility liquidity and system efficiency.	Recognises that price increases deepen poverty; flags affordability risks for women, informal workers, and rural households.	Tariff reforms may increase energy poverty without targeted subsidies; sequencing risks backlash; justice is not integrated into financial reforms.
Procedural	Participation, transparency, and meaningful voice at all levels.	Centralised planning; minimal mechanisms for consultation; assumes federal regulatory dominance.	Notes decentralisation; acknowledges weak state capacity and poor coordination mechanisms.	Institutional fragmentation likely; state regulators uneven; no framework for joint planning or dispute resolution.
Recognition	Addresses differentiated vulnerability (gender, region, livelihoods).	Acknowledges clean cooking deficits and rural access challenges, but superficially.	Highlights gendered burdens, health risks, climate sensitivity, and livelihood precarity.	Justice concerns recognised in NDC 3.0 but not operationalised in Mission 300; vulnerable groups remain unprotected.
Spatial	Uneven energy poverty across regions; rural–urban and north–south divides.	Mentions rural expansion and decentralised mini-grids.	Identifies climate vulnerability hotspots and regional inequalities.	Private sector focuses on high-income states; no redistributive mechanisms; inequality may widen across regions.
Restorative	Redress for displacement, land disputes, and cumulative environmental harm.	Largely silent on redress or compensation.	Notes vulnerability but does not specify reparative mechanisms.	Cumulative and historical harms unaddressed; no channels for compensation or remedy.
Institutional	Fairness in enforcement, consistent rules, and administrative capability.	Assumes strong federal authority; downplays subnational variation.	Flags weak measurement, reporting, and verification systems, limited subnational capacity, and inconsistent regulatory readiness.	Decentralisation may amplify uneven state capacity; institutional incoherence threatens implementation.
Temporal	How burdens and benefits are spread over time; intergenerational fairness.	Sets multi-year targets but prioritises financial fixes upfront.	Warns that climate shocks will intensify vulnerability without social protection.	Short-term burdens fall on households while long-term benefits remain uncertain; sequencing is misaligned with protection needs.

Table 1. (Cont.) Justice analytical framework applied to Mission 300 and NDC 3.0.

Dimension	Energy Justice Lens	What Mission 300 Does	What NDC 3.0 Adds	Combined Gaps/Risks in Nigeria
Labour/Income	Impacts on livelihoods, informal markets, and household budgets.	Notes subsidy reform and efficiency gains, but no labour strategy.	Identifies economic vulnerability and livelihood risks, especially in rural areas.	Without compensatory measures, reforms may worsen income insecurity and deepen dependence on informal energy.

As seen in Table 1, across all eight dimensions, Mission 300 responds with a technical instrument while justice appears only as an indirect effect. On the distributive row, it pushes cost-reflective tariffs and subsidy reduction; on the procedural row, it assumes centralised, federally led planning; on recognition, it acknowledges clean cooking and rural access gaps only in passing; and on the restorative and labour rows, it is largely silent. The NDC 3.0 column flags gendered burdens, spatial inequality, climate vulnerability, and livelihood risk across the recognition, spatial, temporal, and labour rows. However, the final column, the combined risks, shows why this is not enough: In every case, the recognition in NDC 3.0 is not matched by an enforceable mechanism, so the gap between stated concern and operational tool persists. The two columns show that Mission 300 does not address justice by omission and NDC 3.0 does not address justice by under-specification. The Combined Gaps/Risks in Nigeria column shows that both failures land hardest where state capacity is weakest. Justice remains weakly institutionalised across both, and decentralisation under uneven capacity is what turns that weakness into unequal outcomes.

Distribution is the most immediate challenge, and recent events make it concrete. Mission 300 prioritises cost-reflective tariffs, subsidy reduction, and utility liquidity, framed as necessary to stabilise the sector and attract investment, but without explicit affordability safeguards, targeted subsidies, or consumer protection. The April 2024 Band A reform shows what this looks like in practice. NERC moved the roughly 15 percent of customers on the best-served feeders to cost-reflective tariffs, raising the affected rate from about ₦68 to ₦225 per kilowatt-hour, an increase of more than 200 percent, before partially walking it back to around ₦207 under pressure (Akpan, 2024 ; “Electricity tariff hikes,” 2025). The backlash was immediate: Labour unions protested nationwide and picketed the offices of NERC, the Transmission Company of Nigeria, and distribution companies, demanding reversal (Johnson & Ahiumayoung, 2024). Even Band A customers frequently did not receive the promised 20 hours of supply, so the reform raised what households paid without reliably improving what they received. NDC 3.0 recognises that price increases can deepen poverty and disproportionately affect women, informal workers, and rural households, yet does not specify how electricity-sector reforms will be adjusted to mitigate these effects. As previously discussed, the difficulty is not stabilisation as such but the pursuit of cost-reflective pricing in a system of poor service, weak metering, and low incomes without compensatory protection (Ogunleye, 2016; Sesan et al., 2024). Tariff reform thus proceeds without a parallel justice architecture, raising the risk that energy poverty intensifies even as sector finances improve.

Procedural justice reveals a second structural weakness. Mission 300 assumes a largely centralised model in which federal institutions retain planning and regulatory authority, with limited consultation and an under-specified role for state actors. This is increasingly misaligned with the post-2023 reality, in which the Electricity Act 2023 devolves substantial authority to states, empowering them to license private operators

and regulate intrastate generation, transmission, and distribution within their territory (UN Trade and Development, 2023). NDC 3.0 acknowledges decentralisation and weak coordination but does not resolve the resulting ambiguity. Without clear frameworks for joint planning, dispute resolution, or public participation, procedural justice remains fragile, and households and subnational actors have little capacity to influence decisions affecting tariffs, access, and service quality. The Band A episode again illustrates the point: A major affordability decision was taken centrally and adjusted only after street-level protest, which is the opposite of a procedure designed to give affected groups voice before the fact.

Recognition justice exposes the limits of Mission 300's design. The Compact acknowledges rural access gaps and clean cooking deficits but treats households as a broadly uniform group of beneficiaries. NDC 3.0 offers a sharper diagnosis, highlighting women's exposure to biomass cooking, health risks, climate sensitivity, and rural precarity, but recognition is not translated into targeted interventions. Clean cooking is the clearest example. Only around 16.8 percent of Nigerians had access to clean cooking fuels and technologies as of 2021, roughly 35.5 million people out of a population then near 211 million, leaving the large majority dependent on firewood, charcoal, and other polluting fuels with their associated burdens of respiratory disease and lost time ("FG incentivises clean cooking," 2024). These burdens fall disproportionately on women, who manage household cooking and bear the health and time costs of biomass dependence. Federal interventions such as the Grassroots LPG Penetration Programme, run under the Decade of Gas initiative, distribute cylinders and have set a target of five million liquefied petroleum gas (LPG) cylinders by 2030, around one million household conversions a year (Babatunde, 2025). But neither Mission 300 nor NDC 3.0 specifies how affordability, the LPG supply chain, safety, or adoption barriers will be addressed across states with very different market conditions, nor how a one-off cylinder reaches a household that cannot afford recurrent refills. The point is sharpened by the fact that cooking gas prices have risen toward ₦2,500 per kilogram amid supply tightness, which puts recurrent refills beyond the reach of exactly the households the programme is meant to convert. Recognition of the problem is not the same as an instrument to resolve it. Restorative justice is weaker still. Following Amaefule et al. (2026), a transition should not only avoid new harms but address displacement, land disputes, and cumulative environmental burdens; both frameworks are largely silent on redress, leaving historical and cumulative harms unaddressed.

Spatial justice is similarly underdeveloped, and the mini-grid record demonstrates why. Mission 300 relies heavily on private-sector delivery through mini-grids and decentralised solar, implicitly assuming market expansion will close access gaps. Nigeria has indeed become a continental leader in decentralised renewables, connecting nearly six million people through more than 170 mini-grids and 1.2 million standalone solar systems (Ikeh, 2025; World Bank, 2025). But the same market logic that drives this growth also limits its reach. Developers prioritise commercially viable sites, and field research finds that mini-grids have largely not reached the poorest and most remote communities, who face the highest tariffs or remain excluded, with industry representatives candidly stating they have little interest in serving rural areas where there is no money to be made (Sesan et al., 2024). The result is that a market-driven model expands supply impressively in aggregate while leaving the spatial distribution of access broadly intact, mapping onto the existing north-south and rural-urban divides. NDC 3.0 identifies regional inequality and climate vulnerability hotspots but proposes no mechanism to realign investment flows, so spatial disparities are likely to persist or widen.

Institutional justice emerges as a central constraint across all dimensions. Mission 300 presumes regulatory coherence and administrative readiness that do not exist uniformly across Nigeria's states, while NDC 3.0 flags weak monitoring, inconsistent data, and uneven regulatory capacity without specifying how these deficits will be addressed. The uneven progress of state electricity commissions under the 2023 Act makes this tangible: Where some states have enacted electricity laws and begun standing up regulators, many have not, and NERC continues to regulate by default in those that lack the capacity to take over. As the state capacity literature predicts, decentralisation without coordinated capacity-building risks uneven enforcement, divergent tariffs, and fragmented planning (Herbert, 2021; Okereke et al., 2025; Soifer, 2013). Justice outcomes therefore depend on state capacity at the federal and subnational levels and not only on nationally defined rules.

Temporal justice further complicates implementation. Mission 300 sequences reform so that financial adjustments—tariff increases and subsidy reduction—precede improvements in access or reliability; benefits are long-term and uncertain while costs are immediate. The Band A reform again illustrates the asymmetry: Households paid more from the month the tariff changed, while the promised supply improvements were inconsistent and, for many, never materialised. NDC 3.0 warns that climate and livelihood shocks will intensify vulnerability without social protection but does not link this to the sequencing of electricity-sector reform. The result is a temporal asymmetry in which households absorb short-term burdens without assurance of timely benefits, raising political and social risk. Finally, labour and income impacts remain largely unaddressed: Mission 300 notes efficiency gains and fiscal savings but no employment or informal-livelihood strategy, and NDC 3.0 recognises economic vulnerability without integrating labour into energy policy design (Markkanen & Anger-Kraavi, 2019). Manufacturers have reported that the tariff increases raised production costs and contributed to closures and job losses, a labour consequence neither framework anticipates or cushions.

Overall, justice under Mission 300 and NDC 3.0 is unevenly articulated and weakly embedded in implementation. Mission 300 prioritises reform feasibility and investment mobilisation; NDC 3.0 foregrounds vulnerability without operational tools. Domestic fragmentation amplifies these gaps, transferring authority without ensuring capacity or coordination, so that justice outcomes are shaped less by deliberate design than by existing inequalities in state capacity, market viability, and household resources.

6. Discussion: How Institutional Dynamics Produce Justice Deficits

The preceding analysis identifies where justice is weakest across both frameworks. This section explains why. It argues that these justice deficits are not separate problems but stem from the same underlying governance configuration: reforms implemented through fragmented institutions, shaped by Nigeria's rentier political economy, and devolved to states with widely varying levels of capacity. Market-based mechanisms then tend to favour commercially viable projects over the needs of vulnerable groups (Amaefule et al., 2026; Okereke et al., 2025; Osunmuyiwa et al., 2017; Sesan et al., 2024).

Three cross-cutting dynamics connect the rows of Table 1. The first is institutional layering. Because Nigeria's electricity governance is the accumulated residue of colonial, state-led, and market-reform settlements (Edomah, 2021), reform does not operate on a clean institutional slate but through overlapping mandates, weak policy cycles, and contested authority (Edomah et al., 2016; Ogunleye, 2016). This is why distributive and procedural failures recur: Affordability safeguards and participatory procedures require

institutions able to carry policy coherently from design to delivery, and the inherited structure does not reliably provide them. The second dynamic is the dispersal of authority among many actors, including powerful external ones. Where the World Bank, the AfDB, and other agencies shape market design and intervention priorities while domestic coordination remains weak, policy documents carry several institutional logics at once (Edomah et al., 2021). Mission 300, as a joint AfDB and World Bank initiative, is intelligible in these terms: Its emphasis on investor confidence and financial stabilisation reflects the logics of the actors most central to its design, which helps explain why justice appears as aspiration rather than instrument. The third dynamic is the divergence of institutional lineage between the two documents. Mission 300 descends from electricity-sector reform; NDC 3.0 from climate governance housed in the Federal Ministry of Environment amid long contestation over where climate authority should sit (Koblowsky & Ifejika-Speranza, 2012; Malley et al., 2021). The recognition and restorative concerns articulated in climate language are diluted when translated into an electricity-reform framework, not because anyone rejects them but because they cross an institutional boundary that the governance system does not bridge.

Decentralisation under the Electricity Act 2023 is the mechanism through which these dynamics translate into uneven outcomes on the ground. The Act devolves substantial authority to states, but formal powers do not confer the capacity to exercise them (Herbert, 2021), and the empirical record shows that few states possess the policy instruments, budgets, or coordination mechanisms that effective implementation requires (Okereke et al., 2025).

Mission 300 assumes a coherence of federal authority that no longer holds in the face of the Electricity Act, while NDC 3.0 acknowledges the capacity gap without proposing instruments to close it. The reliance on market-led delivery compounds the problem: Mini-grid regulation has grown investment but not reworked unequal access, because developers rationally prioritise commercially viable sites (Sesan et al., 2024). The spatial bifurcation visible in Table 1 is thus a market failure to be corrected at the margins and the expected result of devolving delivery to markets and states of unequal capacity without redistributive scaffolding.

This explanatory frame also clarifies the temporal problem. Sequencing financial adjustment ahead of tangible benefits is risky in any setting, but it is especially corrosive where institutional legitimacy is already thin and households have long absorbed the costs of unreliable and expensive supply through generators, informal connections, and fuel stacking. The burden falls first on those least able to bear it, and the inherited governance structure offers no compensatory channel, so the temporal asymmetry becomes a political vulnerability rather than a transitional inconvenience. The speed of the protests that met the Band A reform is a measure of how quickly that vulnerability converts into open resistance.

In this context, Nigeria offers a lesson that travels beyond the case, and comparison helps clarify why. South Africa's Just Energy Transition Partnership demonstrates one failure mode: A transition explicitly framed around justice and backed by substantial international finance has nonetheless struggled against the political economy of a debt-laden incumbent utility, fiscal constraints, and dependence on coal-region employment (Seiler et al., 2023). Strong justice language, in itself, has not resolved underlying governance and capacity challenges. Indonesia's experience points to a related problem. Despite receiving substantial international support through the Just Energy Transition Partnership and other climate finance initiatives, decarbonisation has been constrained by power asymmetries within the state itself. Institutions most supportive of transition objectives, such as planning and environmental agencies, possess limited authority, while ministries and

state actors with the greatest influence continue to prioritise growth, energy security, affordability, and incumbent fossil-fuel interests (Apriliyanti et al., 2026). The result is a pattern of fragmented implementation, symbolic commitments, and the strategic use of veto points that slow transition despite the availability of external finance.

India's experience with electricity federalism suggests a more positive possibility, showing that devolved authority can improve responsiveness and implementation where subnational governments possess adequate regulatory and fiscal capacity (Chatterjee, 2018). Yet this is precisely the condition that is unevenly distributed across Nigeria's states. A contrasting set of cases sharpens the point. Studies of community-level transitions in Samsø (Denmark) and Feldheim (Germany) show that decarbonisation was accepted as fair not because outcomes were evenly distributed—they were not—but because the procedures that produced them were perceived as legitimate, built through sustained consultation, local ownership stakes, and compensation for those who bore the heaviest burdens (Mundaca et al., 2018). Crucially, this depended on a generous timeframe that let communities absorb and shape the change rather than have it imposed on them. The relevance to Nigeria is less about scale than about sequence and voice: The Band A reform failed the same test these cases passed, imposing a cost centrally and ahead of any benefit, with consultation arriving only after the protests. The lesson is not that Nigeria should replicate small European villages, but that the legitimacy of distributive outcomes depends on procedural and temporal design, precisely the dimensions its frameworks leave to chance.

Taken together, these cases suggest that the effectiveness of transition programmes depends less on the volume of finance mobilised than on the governance structures, institutional capacity, and political incentives through which that finance is deployed. The comparison reinforces the article's claim: In decentralising, resource-dependent states, justice does not emerge automatically from technically sound reform, nor from justice rhetoric alone. It depends on institutional alignment across levels of government, explicit rules governing distribution and sequencing, and mechanisms that compensate for uneven capacity. Where those are absent, technically sound reforms reproduce inequality through predictable channels: affordability shocks, spatial clustering of investment, uneven participation, and divergent regulatory protection. The contribution of the analysis is therefore to shift the account from identifying governance problems to explaining how a specific institutional configuration produces and sustains them.

7. Conclusion

This article has examined how justice is conceptualised and operationalised in Nigeria's energy transition, focusing on the interaction between the Mission 300 National Energy Compact, NDC 3.0, and the country's decentralising governance structure. Situating these frameworks within energy justice scholarship, the political economy of resource dependence, and the state capacity literature, the analysis shows that Nigeria's transition is constrained not by a lack of ambition or technical diagnosis but by the absence of an institutional architecture capable of integrating distributive, procedural, recognition, and restorative concerns into implementation. Mission 300 and NDC 3.0 fail at the same point from opposite directions: The Compact treats justice as an indirect by-product of technical reform, while the NDC names vulnerability without binding electricity-sector instruments. Justice is therefore shaped less by deliberate design than by pre-existing inequalities in state capacity, market viability, and household resources, an outcome the inherited and fragmented governance configuration produces rather than corrects.

The Nigerian case offers broader lessons for energy transitions in decentralising, resource-dependent states. Justice does not emerge automatically from technically sound reform, nor from justice rhetoric alone; it requires institutional alignment across levels of government, explicit rules governing distribution and sequencing, and mechanisms that compensate for uneven capacity. Without these, transitions risk stabilising infrastructure while destabilising households, or expanding access while widening regional inequality. Three implications follow. First, justice should be treated as a design constraint rather than a downstream outcome, with affordability protections and targeted regional support embedded directly in reform instruments. Second, decentralisation demands governance innovation, including clear federal–state divisions of responsibility, coordination mechanisms, and sustained capacity-building. Third, sequencing matters: Households must experience tangible improvements alongside, rather than long after, cost adjustments. Whether Nigeria’s transition reduces vulnerability or reproduces it will depend on whether these institutional challenges are addressed.

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Conflict of Interests

The author declares no conflict of interests.

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