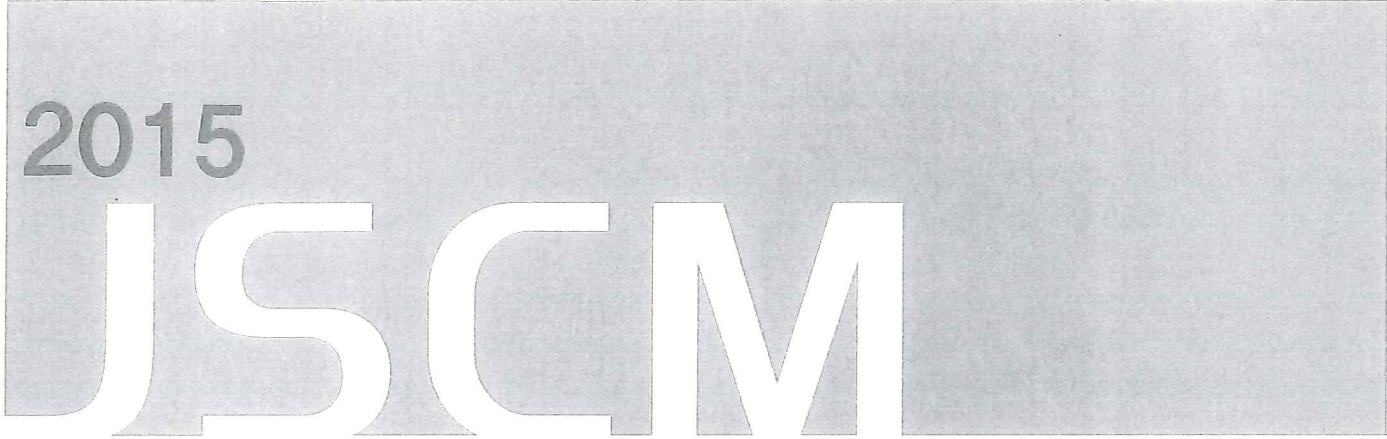


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Enhancing the Competitiveness of Public Utilities in sub-Saharan Africa : The Case of Electricity Reform in Nigeria

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(Abstract)The poor performance of the Nigerian National Electric Power Authority (NEPA) since its inception in 1972 led to the establishment of the Power Holding Company of Nigeria (PHCN) in 2005 and consequently to the unbundling of the PHCN by the civilian government of President Good luck Jonathan in 2010. However, despite efforts by past and present Nigerian governments to reform the energy sector in order to improve electricity generation and distribution the anticipated results appear elusive.

Keywords: unbundling, parastatals, privatization, megawatts.

Introduction

Nigeria is resource rich in coal, solar, hydro, nuclear, and petroleum oil and gas – with petroleum accounting for about 70% of its export revenue. However, Nigeria has remained poor in the supply of energy such as electricity (Akpata & Ogundipe, 2013; Natural Resource Governance Institute, 2015). According to the Nigerian Electricity Commission (NERC), the country energy sector generates less than 6,000 mega watts (MW) of electricity. This problem NERC suggest is largely as a result of the low gas supply to power stations, vandalism of gas pipelines, corruption, and poor project management (Okere, 2015). The inability of the country to generate up to 6,000MW NERC suggest as very little to do with regulatory activities. It is against this background that this study will examine the competitiveness of public corporations such as the Power Holding Company of Nigeria (PHCN) in its ability to supply, distribute, and generate electricity for Nigerians. The study will also attempt to examine socio- economic factors that have inhibited efficient power supply in Nigeria.

Literature Review

Since the beginning of the 1980's there has been a swing in the dominant intellectual and development strategies - away from state initiative, ownership and control in the direction of the market mechanism, and private ownership. This change was sparked by several factors, such as, the perceived success of the newly industrialized countries, and the emergence of conservative regimes in the key Western industrialized nations, a development which has propelled the flourishing of liberal economic doctrines and ideologies (Yahaya, 1993). The ideological bane of the shift from state to market development strategies in most developing countries is the motive that government has been interfering too much in economic activities rather than focusing on issues related to governance (Akinatyo, 2010). The shift towards a strong market economy has also been central to the development strategies propagated by multilateral organizations such as the World Bank and the International Monetary Fund from the 1980s through the 1990s (Haggard & Webb, 1994; Olukoshi, 1993).

However, as a result of the implementation of the world bank economic reforms programs such as structural adjustment, development economists and agencies encouraged private capital flows to the developing world and propagated the position that the private sector would be the provider of investment in infrastructure and public utilities in poor countries. As

a result, there has been a drastic reduction in their shares of state ownership from 16 percent to 8 percent of GDP between 1980 and 1996 (Auriol & Blanc, 2009).

The proliferation of the transfer of public ownership to private ownership between the 1980s and the 1990s was sparked by the poor performance in most instances of public corporations. Kornai(1980) suggests that the performance of these enterprises are at times induced by the lack of any commitment on the part of the government to not to bail out or subsidize money losing firms. Along the same lines, Kornai(2001), and Schmidt(1996) posits that the government of most developing countries that promotes public corporations use soft budget constraints to allow less efficient firms to rely on government. Thus, they suggest that government is in the business of adopting paternalistic or political behavior as they attempt to save jobs and increase employment. To this end, Debande & Friebe(2003) concluded that privatization is an alternative that will improve the public corporations productive efficiency.

Despite some of the gains of privatization there is also growing perceptions in some developing countries that reforms have not necessarily benefited the poor. For instance, Auriol & Blanc(2009) suggest that "since the ruling elites in Sub-Saharan African (SSA) countries design programs in the case of water and electricity there is a concern about their optimality". Their studies argued that some of the privatization programs in SSA are borne out of corrupt practices by some of the ruling elites thus the perceived benefits of privatization are negated by these practices, particularly in the case of utilities such as water and electricity.

Critics of state intervention in developing economies, Yahaya(1993), Lal(1983) and Little(1982), argue that attempts by the state to intervene and correct market failure have even led to bureaucratic failure that is greater than the market failure. Furthermore, these scholars assert that the attempts to use planning and modeling techniques to correct bureaucratic failure will merely compound the problem, because such intervention generally leads to further costs in acquisition and the processing of information; which would have been avoided if the market had been allowed to sway. Yahaya(1993), posits that state intervention induces inefficient, oligopolistic, structures of production, thereby undermining consumer welfare, without delivering the technological developments and learning effects it had promised. Contrarily, Beckman(1982) argued that, either directly or indirectly, both the public and private enterprises in developed economies are instruments through which private accumulation is facilitated. Even if public enterprises are inefficient and fail to implement their objectives, it is the contractors, consultants, and bureaucrats that will benefit from such inefficiency, because it will enhance their accumulation of material wealth.

Nonetheless, this study provides an opportunity to examine the performance of privatized public utilities such as NEPA in Nigeria and their attendant impact on socio-economic development. The power sector liberalization in Nigeria grew out of the wave of power sector liberalization sweeping the globe (Turkson & Wohlgemuth, 2001; Dubash, 2003; Wamukonya, 2003). In the case of Cameroon, Pineau(2004) assessed the performance of the AES-Sonel Corporation, the sole bidder in the sale of the Cameroon electricity company, and found those three years after reform that government involvement in the administration of the AES was unavoidable. Therefore, the anticipated competitiveness of the private sector appeared to be an elusive goal. Similarly, in the case of Thailand, after over ten years of electricity reform, millions of dollars spent on designing competitive markets, and legal and regulatory schemes the reform program did not seek the benefits of competition nor did it provide protection to consumers from profit maximizing monopolies. Instead, the preoccupation of the reform program in Thailand has been the sale of minority shares of state-owned utility monopolies, which has remained largely self-regulated (Greacen & Greacen, 2004).

Byrne, *et. al.*(2004) examined factors that led to the suspension of electricity reform in South Korea on June 17, 2004; four years after two major legislative initiatives were implemented to divide the national electricity monopoly into several companies. The decision to suspend South Korea's electricity reform was sparked by global uneven results of reforms,

concerns about social and environmental impacts, price related issues, and employment impacts from civil society groups. However, Newbery(2005) in his examination of electricity reform in Great Britain suggests that the reform program in Britain was the exemplar of electricity reform because it demonstrates the importance of unbundling ownership and workable competition in generation and supply of electricity.

The next section provides the background on privatization in Nigeria and the attendant reform of the electricity generation and supply.

Background on Privatization in Nigeria

Nigeria's development strategy is broadly capitalist, but it is not clearly defined or articulated, because the state, since independence, has played an ambiguous role neither supporting private enterprise effectively nor playing a key role in the promotion of economic growth and technological advancement (Forest, 1987). This ambiguity was obvious in the first development blueprint adopted by the Nigerian Parliament at Independence on October 1, 1960. For example, the 1962-1968-development plan was targeted towards a policy package that encouraged the development of a vibrant private sector. But since the inception of the crude oil industry in Nigeria, accompanied by the oil sector windfall of the 1970's, the Nigerian government reversed its initial reliance on the private sector (Ayodele, 1990). Instead, the Nigerian Second National Development Plan 1970-1974 supported the establishment of State Owned Enterprises (SOEs). The development indicated that the state owned enterprises are expected to stimulate and accelerate national economic development under the condition of capital scarcity and structural defects in private business organizations (Omoleke, *et. al.*, 2011).

Subsequently, the 1999 Nigerian Constitution equally supported the preeminence of SOEs. The state was responsible for harnessing national resources and promoting national prosperity and an efficient self-reliant national economy. The constitution also gave the state control of the national economy in such a manner as to secure the maximum welfare, freedom, and happiness of every citizen on the basis of social justice. The state, without prejudice, was also responsible for operating and participating in the areas of the economy other than the major sectors (Omoleke, *et. al.*, 2011). As a result of the constitutional provisions in 1999, several SOEs in Nigeria emerged in the following areas:

1. Marketing of commodities
2. Mobilization of funds
3. Development of infrastructures
4. Industrial development
5. Development of commercial and service ventures
6. Agricultural development
7. Development of mineral resources (Omoleke, *et. al.*, 2011)

However, the first serious attempt to re-examine the role of the state in terms of its ownership of enterprises began in 1981 when the civilian government of Shehu Shagari established a Presidential Commission on Parastatals to study the issue of privatization (Yahaya, 1993; Ake, 1982).

In its report of October 1981, the Commission disclosed a grim picture of the activities of public enterprises in Nigeria. They had low returns, low or negative profits, and lacked cost effectiveness. Consequently, the Commission recommended an increased role for the private sector, especially in non-sensitive or non-security related economic activities (Yahaya, 1993). Before the civilian government could respond to this report, the Nigerian economy was already in crisis. The effects of the sharp fall in oil revenues and the world recession were being felt in the country. For example, the Gross National Product (GNP) of the industrialized countries fell by 0.3 percent in 1982, GNP of the oil exporting countries fell by 4.3 percent in 1981, and by another 4.7 percent in 1982. In Nigeria, the production of crude oil fell by 2.056 million barrels a day in 1980, to 1.434 million in 1981, and to 1.299 million in 1982.

Between 1982 and 1983, the Nigerian global debt had also reached \$17 billion (Yahaya, 1993). The external debt opened up loan discussion between Nigeria and multilaterals such as the International Monetary Fund's (IMF). The loan conditions as outlined by the IMF would include a curb on government spending, privatization and commercialization of public enterprises, and rationalization of tariff structures that would have involved considerable liberalization and a vigorous export promotion drive (Bangura, 1987). However, the Shagari civilian government did not establish a concrete agreement with the IMF because a military coup led by General Buhari in 1983 brought an end to the process. Consequently, the ensuing military administration did not adopt the policies recommended by the IMF because the conditions for accepting the loan were considered far too stringent (Yahaya, 1993).

In regards to the public enterprises, a study group on Statutory Corporations, State Owned Enterprises (SOE's), and Public Utilities was set up with the mandate to investigate the causes of the inefficiency of state-owned enterprises, the desirability and methodology of privatization, and possible methods for reviewing the management structure of these enterprises. The study group overwhelmingly recommended the adoption of selective privatization of public enterprises, with between 55 and 70 percent in favor of the private sector because it was believed that it would contribute to greater efficiency in resource allocation. It provided that this did not extend to areas which might be in conflict to the national interest (Yahaya, 1993). The military administration accepted the argument of the group as it related to the privatization of SOE's, and the recommendation for privatization was seen as a general solution to the crisis in the public sector (Adamolekun & Laleye, 1986).

Nevertheless, the liberalization program under the Buhari administration was not fully implemented. The process was abruptly disrupted by another military coup in 1985. The ensuing military junta, led by General Babangida, however, adopted an elaborate privatization program as a result of the poor performance of the SOEs. The Technical Committee on Privatization and Commercialization (T.C.P.C.) was established in 1988 to facilitate the privatization process (Omoleke, *et. al.*, 2011: 74). The major thrust of Nigerian privatization policy is to reduce fiscal deficits, build a broader tax base, attract more investment, and grow the private sector. This thrust was designed to scale down the dominant role of SOEs in the Nigerian economy; which accounted for 50 percent of the GDP and over 60 percent of the modern sector employment. By March of 1993, a total of 55 public enterprises had been privatized by the T.C.P.C. (Omoleke, 2011).

The Need for Electricity Reform in Nigeria

Electricity production and supply in Nigeria has been a monopoly of the federal owned electric utility corporation known as the National Electric Corporation (NEPA) from June 29, 1972 until the early part of 2006 (Olukoju, 2004). Though NEPA supplied about 98.7 percent of the total electricity in Nigeria between 1972 until 2006, the power sector remained marked by low generating capacity and the country is challenged by frequent interrupted supply of electricity (Olukoju, 2004). For instance, when the civilian government took over power in Nigeria in 1999, power generation was about 1,700 megawatts out of an installed capacity of 5,906 megawatts. At the beginning of 2000, power supply declined to 1,500 megawatts, which amounted to 25.3 percent of the installed capacity (Idris, *et. al.*, 2013). At the beginning of 1999 power generation was about 1,700 megawatts. Presently, power generation in Nigeria ranges between 2,500 megawatts to about 3,000 megawatts, while the estimated national consumption is greater than 10,000 megawatts and the potential demand in the next few years is 15,000 megawatts. (Idris, *et. al.*, 2013). Table 1. Illustrates the inability of NEPA to generate electricity in Nigeria.

<Table 1> Electricity Generation in Nigeria

	Power Station	Installed Capacity	Average Capacity (MW)
1	Egbin	1320	635.90
2	Sapele	1020	181.14
3	Delta	912	373.20
4	Kanji	760	395.96
5	Afam	623	154.29
6	Shiroro	600	525.68
7	Jebba	578	481.42
8	Ijora	65	4.54
Total		5,878	2,752.13

※ Source: Sobowale(1999: 16).

<Table 1> also shows the major power stations in Nigeria, their installed capacity, and their available capacity. The Kanji power station built 35 years ago, and the oldest hydroelectric plant in Nigeria, has not been working for some time. The entire six plants at Afam were not working at some point as well. Overall, only four out of eight power plants were operational (Fiakpa, 1999). Most of these power stations are down because some of the spare parts for power generation are outdated and locally fabricated. In some cases, allocated Federal funds were not used to procure the necessary spare parts. This is compounded by the fact that 36 percent of installed capacities are over 20 years old, 48 percent are over 15 years old, and 90 percent are over 12 years old (Fikapa, 1999). At this juncture, the Nigerian electric power sector was at its lowest point of the 79 established generation units in the country; only 19 units were considered operational. This resulted in a daily generation of 1.75 gigawatts (GW), equivalent to approximately 5% of the generation capacity in New York City, which is not enough to enable the nation's 170 million inhabitants to effectively pursue social and economic development initiatives (Werker, *et. al.*, 2014). <Table 2> Illustrates the extent of the weakness of the Nigerian electricity power infrastructure.

<Table 2>Power Infrastructure Indicators for Nigeria

Indicator	Nigeria	Sub-Saharan Africa	World
Number of electrical outages in a typical month	26.3	10.7	8.6
Duration of a typical electrical outage (hours)	8.2	6.6	4.0
If there were outages, average duration of a typical electrical outage (hours)	8.2	6.7	4.4
Losses due to electrical outages (% of annual sales)	8.9	6.7	4.8
Percent of firms owning or sharing a generator	85.7	43.6	31.6
Proportion of electricity from a generator (%)	47.5	13.8	7.1
If a generator is used, average proportion of electricity from a generator (%)	60.9	27.1	20.9
Days to obtain an electrical connection	7.5	31.6	33.6
Percent of firms identifying electricity as a major constraint	75.9	50.3	39.2

※ Source: Moyo(2012).

The failure of NEPA to ensure a regular and steady supply of electricity that will contribute to the social and industrial development of Nigerians brought about the discussion of privatizing the enterprise. At the beginning of 1999, a nationwide poll of public enterprises in 1999 shows that NEPA was voted the worst parastatal in Nigeria. <Table 3> and <Table 4> illustrate the best and worst public enterprises (Parastatals) in Nigeria.

<Table 3>Best Parastatals in Nigeria

Parastatal	Votes	%
National Electric Power Authority (NEPA)	0	0
Nigeria Telecommunications Limited (NITEL)	1483	25
West African Examinations Council (WAEC)	17	N/A
Nigeria Ports Authority (NPA)	62	1
Nigeria Airways	0	0
Nigeria Postal Service(NIPOST)	4008	67
Nigerian National Petroleum Corporation(NNPC)	0	0
CUSTOMS	13	N/A
Nigeria Television Authority(NTA)	418	7
Nigeria National Resource Charter (NNRC)	12	N/A

※ Source: Sobowale(1999: 16).

<Table 4>Worst Parastatals in Nigeria

Parastatals	Votes	%
NEPA	2683	45
NITEL	2	N/A
WAEC	8	N/A
NPA	2	N/A
AIRWAYS	668	11
NIPOST	0	0
NNPC	2643	44
CUSTOMS	4	N/A
NTA	3	N/A
NRC	7	N/A

※ Source: Sobowale(1999: 16).

Consequently, between 1999 and 2013, successive governments in Nigeria aggressively pursued various reform measures to address the problem of electricity distribution and generation in Nigeria. For instance, the civilian administration of President Olusegun Obasanjo in collaboration with the General Assembly established the Electric Power Sector reform (ESPR) Act in 2005, to end the government monopoly of the Nigerian power sector and to open the sector to private partners. The end of government monopoly as a result of the ESPR led to the independent power generator plants operated by energy companies such as AGIP and Shell(Nigeria's Power Crisis, 2014) In 2010, the Good luck administration established a presidential task force to address electricity reform in Nigeria. The task force was responsible for conducting comprehensive policy reviews, formulating new strategies, and introducing legislative actions that streamlined the monopoly control of the NEPA into the Power Holding Company of Nigeria (PHCN). The emergence of the PHCN led to unprecedented unbundling of the decade's old non-performing government owned power monopoly into 18 companies; one transmission company, six power generation companies, and eleven power distribution companies. <Table 5> shows the succession of privatized electricity companies after the unbundling of PHCN.

<Table 5>PHCN Successor Companies

Name	License Type	Capacity/Coverage
Abuja Electricity Distribution Company Plc	Distribution	Garki, Lafia, Lokoja, Min
Afam Power Plc	Generation	987.2MW
Benin Electricity Distribution Company Plc	Distribution	Ado-Ekiti, Akpakpava, Aku
Egbin Power Plc	Generation	1,320MW
Eko Electricity Distribution Company Plc	Distribution	Festac, Ijora, Islands, B
Enugu Electricity Distribution Company Plc	Distribution	Aba, Abakaliki, Awka, Aba
Ibadan Electricity Distribution Company Plc	Distribution	Abeokuta, Dugbe, Ijebu-Od
Ikeja Electricity Distribution Company Plc	Distribution	Alimosho, Ikeja, Ikorodu,
Jos Electricity Distribution Company Plc	Distribution	Bauchi, Gombe, Jos, Makur
Kainji Hydro Electric Plc	Generation	760MW
Kano Electricity Distribution Company	Distribution	Dala, Dutse, Funtua, Kati
Port Harcourt Electricity Distribution Company Plc	Distribution	Borokiri, Calabar, Diobu,
Sapele Power Plc	Generation	1,020MW
Shiroro Hydro Electric Plc	Generaton	600MW
Transmission Company of Nigeria	Transmission	TCN remains in government ownership, and is being managed by Canadian firm Manitoba Hydro under a contract
Ughelli Power Plc	Generation	942MW
Yola Electricity Distribution Company Plc	Distribution	Damaturu, Jalingo, Maidug

※ Source: Business Monitor International(2014: 25).

From among this number, each new power distribution company was designated to serve specific regional zones or markets in the country, thus signaling the deregulation of the Nigerian power sector (New African, 2013).

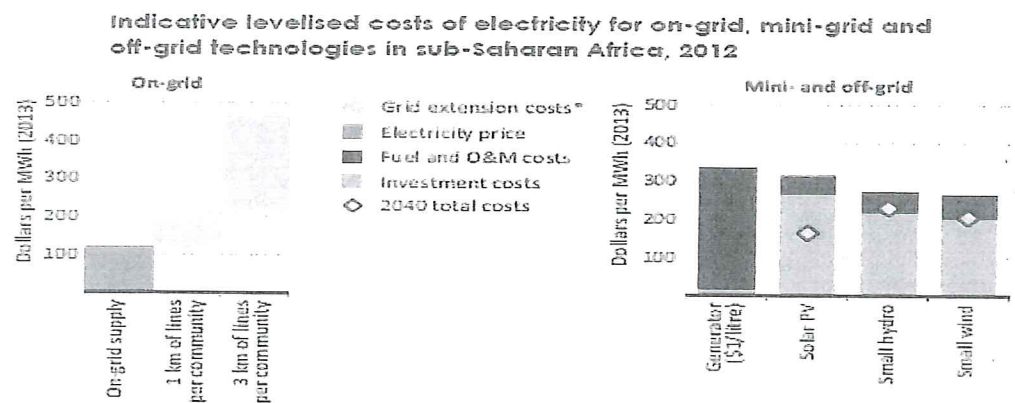
Challenges of Electricity Reform in Nigeria

Electricity reform in Nigeria has been mired by several social, economic, and political challenges over the last two decades. One of such challenges is the lack of strong financial investment in the electricity power sector to address the poor infrastructure. In this regard, Werker, *et. al.*(2014) suggest that the electricity power infrastructure in Nigeria had become poor because of decades long underinvestment in the national transmission grid. Underinvestment in the national grid has led to the dependency of the electricity power sector on old equipment and corroded cables. Moreover, as pointed out in Table 2, Nigeria is unable to meet the demand for electricity because of an insufficient power grid, which has resulted in the frequency of power outages and one of the highest dependence on generators (Moyo, 2012). In this regard, the Africa Energy Outlook for sub-Saharan Africa for 2014 shows that about 95 million Nigerians, 55 percent of the estimated 165 million population, do not have access to grid electricity (International Energy Agency 2014: 31)

The poor electricity infrastructure in Nigeria has also contributed to low productivity and unemployment in the manufacturing sector of Nigeria (George & Oseni, 2012). The declining productivity is for the most part, attributed to the use of non-grid source of electricity such as generators. This source of electricity is not cost effective because it is driven by the global market price of petroleum. According to Moyo(2012), 85.7 percent of

Nigerian firms, when compared with 43.6 percent in other SSA countries, were using or sharing generators, and 75.9 percent of firms identify electricity as a major constraint when compared with 50.3 percent of other SSA countries. Similarly, Ogunidipe(2013) posits that poor access to electricity in Nigeria has been a major impediment to Nigeria's economic growth. Nonetheless, for Nigeria to improve its power sector the investment requirement is estimated at about \$4 billion per year and about \$6 billion per year would be required for technology and development (International Energy Agency, 2014).

Public utilities reforms in most of SSA have also posed some hardship for the poor, because the pricing of public utilities before reforms were subsidized and kept below cost. However, raising the prices of public utilities in order to meet financial sustainability has presented further social and economic hardships for the poor. <Figure 1> below shows the indicative levelised costs of electricity for on grid, mini grid and off grid technologies in SSA. For instance, the in grid supply (electricity) is about \$100 per MWh. While the grid extension cost is \$200 per 1 kilometer of lines. At the same time the mini and off grid electricity in SSA cost about \$1 per liter for the use of petroleum in generators and about \$300 per MWh. However, the cost of Solar Photovoltaic (PV) is estimated at \$200 per MWh by 2040 (International Energy Agency, 2014: 128).



※ Source: International Energy Agency(2014: 128).

<Figure 1>Cost of Electricity in SSA

In the case of Nigeria, *et. al.*(2014) suggest that the government had an overarching goal to keep the power sector financially viable. In order to accomplish this goal the end user tariff was expected to reflect the cost. However, the Nigerian government had traditionally set a flat tariff for the general population while adjusting for the varying ability to pay. It is instructive to note that the cost of electricity in Nigeria is also driven by the fact that some of the electricity supply is imported through improved connections. One example of this type of market is the Cameroon power sector expansion (International Energy Agency, 2014: 83).

Other factors that have also contributed to the underperformance of the electricity distribution and generation in Nigeria are improper billing and collection, consumers stealing, and the lack of proper incentives for the power companies (Werker, *et. al.*, 2014).

Conclusion

This study shows that the poor performance of the National Electric Power Authority (NEPA) since its inception in 1972, which led to the establishment of the Power Holding Company of Nigeria (PHCN) and consequently to the unbundling of the PHCN by the civilian government of President Good luck Jonathan in 2013, has not produced the anticipated results that were expected from electricity reform in Nigeria. Instead Nigeria has continued to be

mired by frequent electricity interruptions. According to the International Energy Agency(2014: 31), an estimated 93 million Nigerians are without electricity.

As a result of the continued poor access to electricity, the Nigerian economy is not likely to reach its full potential. Some indigenous manufacturers have already moved a significant part of their operations to neighboring countries, such as Ghana, to reduce the cost of manufacturing in Nigeria. For instance, 75 percent of Nigerian firms identified electricity as a major operational constraint (Moyo, 2012). In the same vein, Olukoju(2004) suggest that frequent electricity outages have led to the sudden death of some Small and Medium-Scale Enterprises (SMEs) in Nigeria because of operational costs of generating electricity using petroleum, which was estimated at \$1 per liter for Sub-Saharan Africa (International Energy Agency, 2014: 128).

The continued poor performance of the Nigerian electricity sector is also perpetuated by poor maintenance of the Nigerian electricity grid and other infrastructures. This performance is further accentuated by the lack of investment in the sector. Albeit, the Nigerian government had consistently injected about \$2billion per year to improve the state owned electric utilities It is estimated that it would take about \$5 billion investment annually to realize the anticipated improvement for the sector (Werker, *et. al.*, 2012: 4; New African, 2014: 2)

In addition, Nigeria and other African countries have not been able to address the increasing end user price of electricity supply through electricity reform. For instance, electricity prices for the end user sector, industry and residential, is between 130-140 per MWTH (International Energy Agency: 66). Consequently, in most Sub Saharan African countries electricity reform has not been able to meliorate some of the social economic challenges that have ensued as a result of electricity outages.

Notes:

¹Parastatals are officially defined as commercial enterprises owned by the government or with majority government participation and are run on commercial principles. Ake, C. (9182) Political Economy of Africa Ibadan: Longman Publisher, 94.

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