TOWARDS A HOLISTIC INTEGRATION OF ENERGY JUSTICE AND ENERGY SYSTEM ENGINEERING

BY

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PRELIMINARY EXAMINATION

Submitted in partial fulfillment of the requirements
for the degree of Doctor of Philosophy in Nuclear, Plasma, and Radiological Engineering
in the Grainger College of Engineering of the
University of Illinois Urbana-Champaign, 2024

Urbana, Illinois

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Chapter 1

Motivation and Introduction

Climate change produced by greater atmospheric CO_2 concentrations [1] from human activity has led to increased exposure to hazards worldwide and domestically: increased storm severity, rising sea levels, more extreme temperatures, hotter summers, and rising sea levels to name a few [2]. Without immediate action to reduce carbon emissions, these impacts will worsen [3]. Specifically, it is primarily our societal dependence on fossil fuels to support our expansive economies and energy systems that contributes the most to rising carbon dioxide levels (along with other greenhouse gases (GHGs)) [4]. Therefore, to achieve the almost universally shared goal of halting and reversing the effects of climate change [5], our globalized society must transition away from fossil fuels to clean energy technologies such as nuclear and renewable energy and switch our transportation systems to electric or hydrogen powered vehicles [6].

Naturally, the importance of modeling energy systems to gain insight and form strategies to achieve this transition has grown. Especially since the spatial and temporal complexities are also expected to grow with greater penetration of variable renewable energy (VRE), such as solar and wind energy — two energy sources that are spatially diffuse and temporally challenging to predict. A class of tools called energy system optimization models (ESOMs) are the most common method for understanding our energy systems. However, while climate change may be the most immediate existential threat to society [7], it is a focusing issue that brings challenges of equity and disproportional impacts to the fore. These latter challenges have been always been concomitant with our energy system, but energy system modeling has largely ignored the ways energy systems mediate socio-political power alongside transporting electrons and fuel. For example, fossil fueled power plants have always been associated with air pollution and worsened health for nearby communities — commonly poorer and black communities, which are already marginalized, evincing a violation of fairness and justice principles [8]. Studying these consequences of our energy choices historically belonged to domain of the environmental justice literature [9], [10] but has developed further into the discipline of energy justice [11].

The energy transition will require a great expansion of our energy infrastructure to build replace fossil-fueled energy with clean energy and additional transmission networks to carry electrons. Although the technology to accomplish this transition is mature, there is still local public opposition to many energy projects [12]. Particularly in empowered and affluent communities [13]. ESOMs cannot capture these "human dimensions" of energy systems despite some awareness of their importance [14]. This is because they only optimize a single objective — cost (or some other aggregated economic metric). People have and express preferences over many dimensions simultaneously. Further, even in the absence of climate change, incorporating social context into the practice of energy modeling remains beneficial since doing so will create substantively better decisions [15]. The solution for enclosing this feature of energy system design proposed in this thesis is two-fold. The first is to develop an ESOM capable of multi-objective optimization. The benefits of multi-objective optimization have been understood for some time, yet only recent advances in computing power have made them a practical method for energy modeling. Hobbs (1995) wrote:

> Multi-objective methods are more appropriately used to help people to understand the problem better, explore their feelings, form a coherent, defensible set of values, and understand the implications of those values for the decision. [...] In reality, people's values are often uncertain and incoherent. During the course of a planning exercise, people's attitudes will evolve in response to new information, interactions with other people, and viewing the problem from different perspectives [16].

This leads to the second major proposal for this thesis, which is to validate the multi-objective ESOM developed within by conducting a case study in the Champaign-Urbana region involving interviews with local energy planners and incorporating their feedback to develop a planning process that encourages greater participation by the community members. Altogether, this work will allow "non-technical" perspectives to be incorporated into a rigorous modeling framework leading to greater perceptions of legitimacy through an iterative articulation of values and priorities involving the public as key deliberators. The result is a step towards a holistic integration of energy justice and energy system engineering.

Chapter 2 discusses the existing literature and work from several spanning disciplines, including risk assessment, energy justice, and energy system optimization. Chapter 3 details the technical methods I applied to create a flexible multi-objective optimization framework called Open source multi-objective energy system framework (`Osier`). Chapter 4 validates `Osier` as an ESOM by comparing its results against an established representative ESOM, and demonstrates current progress. Finally, Chapter 5 outlines a proposal for the remaining work of this thesis.

Chapter 2

Literature Review

Every year, world leaders meet to discuss plans to address climate change at the COP summit. In 1995, world leaders established a set of targets with the Kyoto Protocol [17] and again with the 2016 Paris Climate Agreement [5]. Every few years, the United Nations releases a report from the International Panel on Climate Change (IPCC) assessing the current impacts of climate change and forecasting future scenarios. Most of the world understands that anthropogenic climate change is an existential threat to society. Indeed, many studies in the ESOM literature begin with a statement about the urgency of climate change. This chapter reviews the extant literature for both quantitative and qualitative analyses of the problem considered in this thesis — primarily bridging the gap between feasibility or planning studies to address the climate crisis and the current pattern of missed targets and growing carbon emissions. First, I draw from the risk assessment literature to characterize and situate the problem of climate change and demonstrate the necessity of a holistic analysis. Second, I build upon the central issue of disproportionality of climate change risk by reviewing the energy and environmental justice literature. Third, I develop an encompassing definition of an "energy system" using technical and social perspectives. Finally, I review the energy system literature for gaps in conventional modeling practices and identify previous attempts to incorporate social science and justice concepts into energy system models.

2.1 Characterizing the Problem of Climate Change

Risk is generally understood as the "potential for adverse consequences" [18]. However, due to the complexity of climate change, the IPCC developed a three-tenet framework to discuss risk [18]: hazard, exposure, and vulnerability. *Hazards* are mediated by physical features, such as climate and topography [19], [20]. Climate change is already producing more significant hazards, like forest fires, hurricanes, storms, floods, droughts, and heat waves [2], [6], [21]. *Exposure* refers to the scale and duration of the subjection of people, infrastructure, and social wealth to a particular hazard [18], [20], [22]. *Vulnerability* is the ability of a system to cope, recover, and adapt after exposure to a hazard. Although climate change is a worldwide phenomenon, vulnerabilities to its hazards are not uniformly distributed. On the contrary, the people and communities most likely to be harmed by climate change are already harmed by social inequities [23]. For example, low-income communities have fewer resources to respond to natural hazards, such as hurricanes, floods, or fires, and therefore take longer to recover, compared to a communities with relatively greater wealth. Recent work from Simpson et al. [20] expanded on this definition of risk by including *responses* to risk as itself a driver of risk. This framework is illustrated in Figure 2.1 using infrastructure risk as an instructive example. Considering the actions taken (or not) in response to climate change is vital for a holistic understanding of risk because it encompasses benefits and mitigating outcomes, not just negative, inflammatory ones. Additionally, heterogeneous stakeholders perceive the costs and benefits of (in)action differently. Therefore, including response as a driver of risk is essential for making choices more transparent and actionable within decision-making structures [20]. Responses to climate change risk come in myriad forms, and at multiple scales, from individual choices (e.g., demand response) [24]–[26] to community responses [27], [28], national level policies [29], [30], and levels in between. Paterson and Charles [27] developed a descriptive typology for community-based hazard responses that also applies to national and global scales. The five response categories making up this typology are: [27]

1. individual and material well-being, which seek to meet individuals' basic needs such as food, water, and shelter, as well as livelihood and health.
2. relational well-being emphasizes community and support networks and could include evacuation or relocation.
3. awareness involves monitoring and stock-taking of potential hazards.
4. governance relates to decision-making structures around human-hazard interactions.
5. infrastructure refers to the physical defense against hazards using engineered tools or ecological characteristics.

Figure 2.2 shows the breakdown of the categories. Although this framework could help assess policies to mitigate climate change, these response categories are related to specific climatic hazards rather than climate change mitigation.

Based on the net-zero carbon emissions target set by the 2016 Paris Agreement, myriad countries, states, and companies have set climate policies covering two-thirds of the global economy [31]. Reducing CO_2 (or CO_{2eq} in some cases) emissions is the primary focus for most of these policies [29]–[31], which includes the following broad strategies [30]:

1. Reducing GHG emissions by transitioning from fossil-fueled to clean energy.
2. Removing CO_2 from the atmosphere using carbon capture and storage (CCS) and other sequestration techniques.
3. Altering the Earth's energy balance by increasing its albedo and other geoengineering concepts.

Despite this, only around five percent of these policies are consistent with the United Nations (UN) "Race to Zero" campaign [31]. Further, even the full implementation of national climate policies leaves approximately a 28 $GtCO_{2eq}$ gap in GHG emissions [29] (with the implicit goal of zero emissions). This gap and the fundamental assumptions about carbon sequestration from the 2016 Paris Agreement suggest that the world is on track to overshoot these emissions targets [29], [32]. Carley et al. (2018) developed a quantitative framework for assessing the vulnerabilities associated with energy policies or responses [33].

Risk analysis is the first step to a more encompassing understanding of the climate crisis. The literature on disproportionality further distinguishes *risks* and *impacts* [19]. Consistent with previous work, a risk is the aggregate of hazards, exposures, vulnerabilities, and responses. Impacts, then, are the realizations of

Figure 2.1: A framework for decomposing risk into its parts: hazard, exposure, vulnerability, and response, using risk to infrastructure as an illustrative example. Reproduced from Simpson et al. (2021) [20].

risk in terms of loss and damages. This distinction is essential. Responses to *impacts* are always made *ex post facto*. Differences in vulnerability to a hazard, often arbitrated by socio-economic status, manifest as differential impacts. Access to resources conditions an individual's or community's ability to respond to the impacts of a hazard. Since losses from impacts disproportionately affect those with the fewest resources, their vulnerability to future hazards increases in a "vicious cycle" [19], [23]. In purely economic terms, studies estimate the loss of ecosystem services from land use change associated with climate change and other human activities at $4 - $20 trillion per year (in 2011 $US) globally, [34] and the poorest third of U.S. counties will experience financial damages between 2 and 20 percent of their annual income [35]. However, impacts also have cultural and psychological dimensions [19] that cannot be captured by accounting for "externalities."

Dorkenoo et al. [19] establish *burdens*, injustices arising from social, political, or economic power imbalances, as a third theme paramount for a holistic understanding of disproportionality. Burdens influence all aspects of risk and affect access to resources which condition impacts. Dorkenoo et al. wrote, "[p]rocesses of marginalization and exclusion influenced by power struggles [...] influence the distribution of burdens and consequently responsibilities, in addition to the different dimensions of climate risk (hazard, exposure, vulnerability [, response])" [19]. Figure 2.3 demonstrates the mutually reinforcing relationships among risks, impacts, and burdens. A particularly relevant example of burden is the persistence of energy burden, where low-income households pay the highest percentage of their income on energy bills relative to other income groups [36], [37]. Energy burden interferes with electricity access, thereby increasing vulnerability to extreme heat events [37], [38]. The risk assessment literature and the energy system modeling literature typically adopt an apolitical framing of vulnerabilities. That is to say, these literature to analyze their respective systems independent of any sociopolitical context. However, inequities do not arise in a vacuum but through processes of marginalization and exclusion [39]. Often the distribution of burdens falls along class, race, and gendered lines [8], [39]. Research on siting patterns of polluting facilities indicates these projects frequently

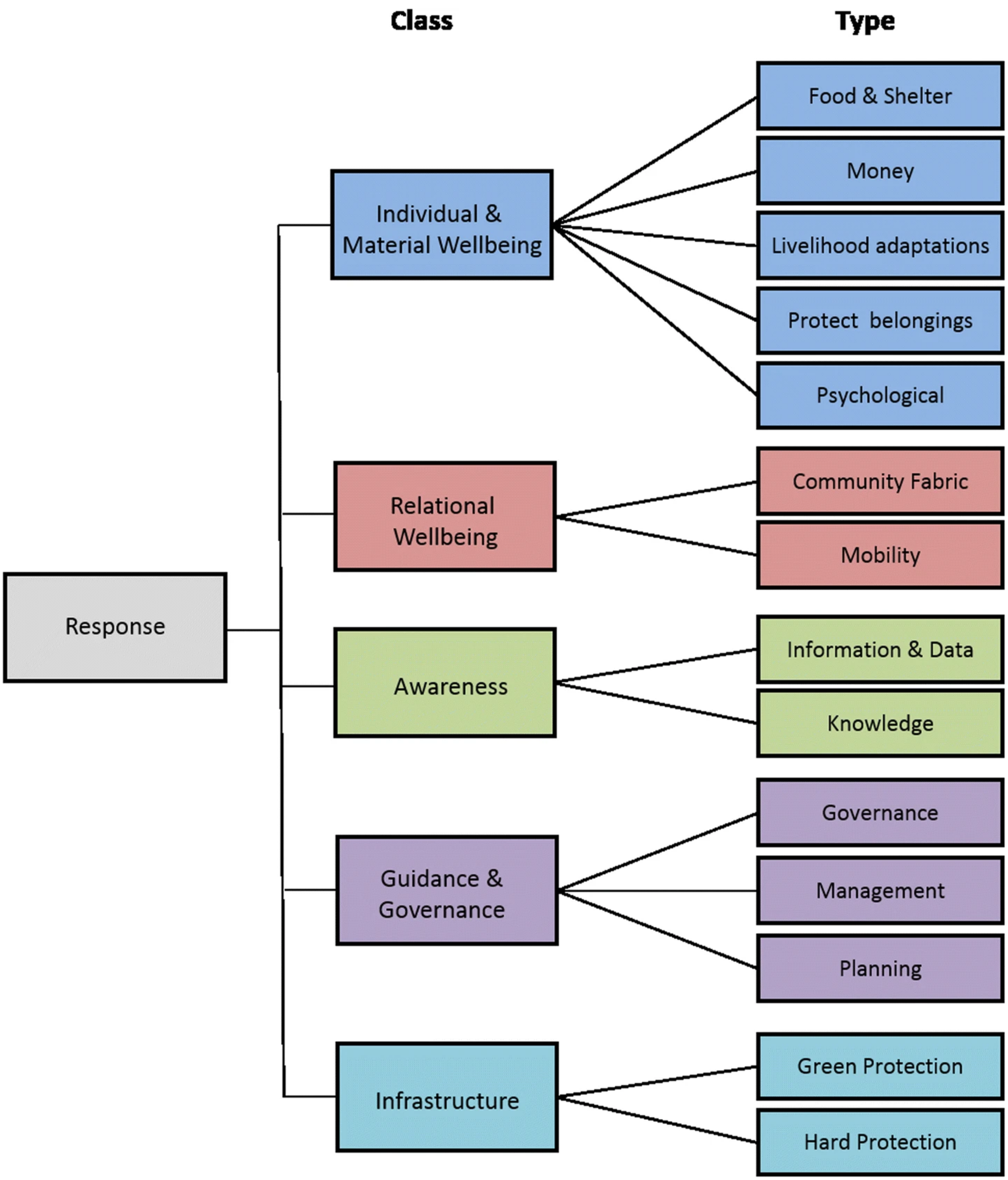

Figure 2.2: A categorization schema for various responses to climate risks. Reproduced from Paterson et al. (2019) [27].

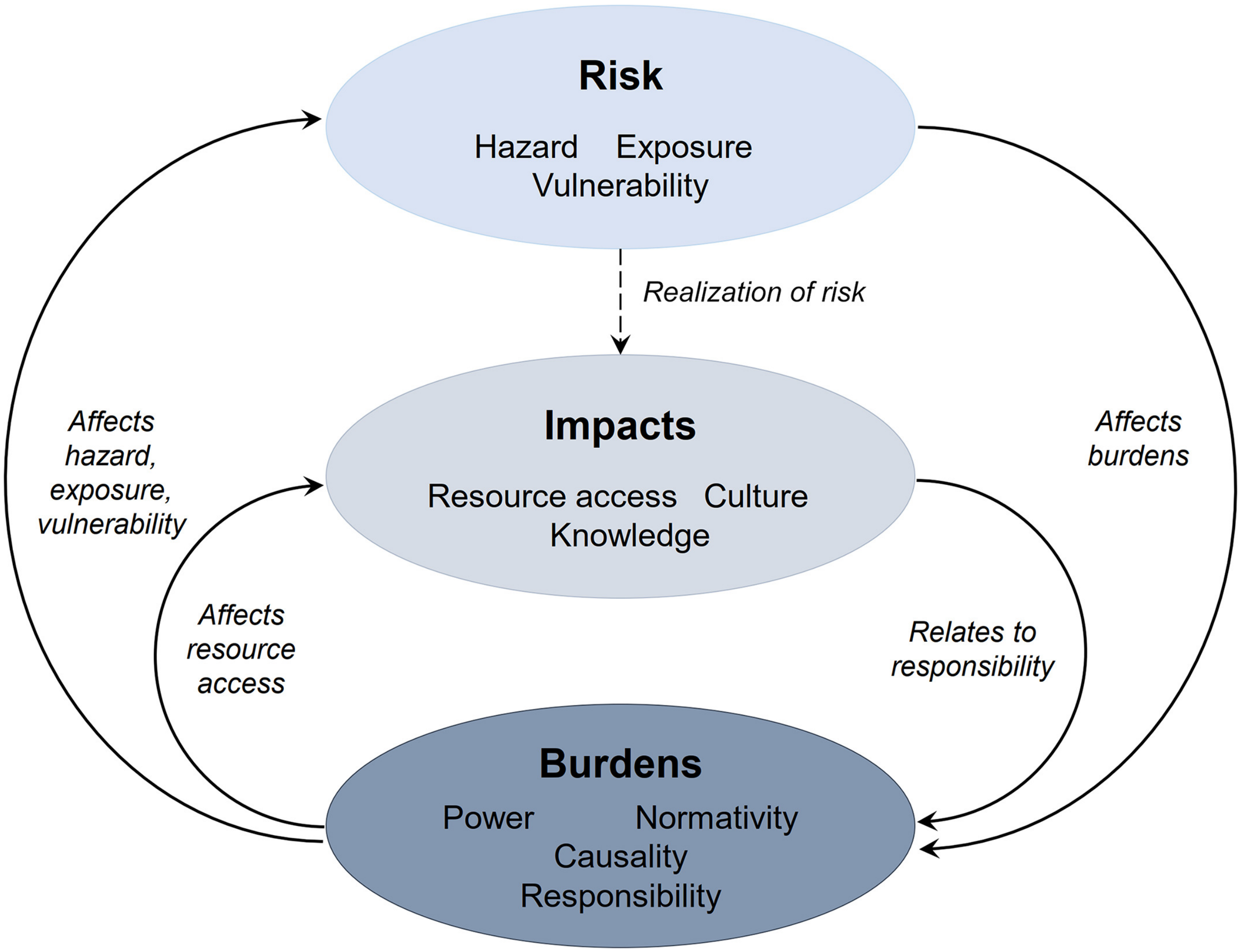

Figure 2.3: The relationships among risks, impacts, and burdens. Reproduced from Dorkenoo et al. (2022) [19].

developed in areas with people of color and low-income populations [8]. Pollution from these facilities creates additional burdens for nearby communities. The energy justice and environmental justice literature offer insights to contrast this neutral framing and facilitate normative questions about alternative distributions [19], [39].

2.2 Climate and Energy Systems

Climate change is driven by the buildup of additional GHGs in our atmosphere from human activities. GHGs are a significant byproduct of the infrastructure that creates, delivers, and consumes energy (i.e., energy infrastructure). The total decarbonization of the global economy will lead to greater electricity demand, even when accounting for efficiency improvements [40], [41], decarbonizing our electricity production is one of the most critical issues to resolving climate change. Therefore, producing electricity with zero GHGs will initiate a cascade of deeper decarbonization throughout the economy. However, this will require expanded electrical infrastructure to accomodate new energy technologies. Since, energy production contributes significantly to climate change, and new energy infrastructure is required to reduce carbon emissions in other sectors (e.g. heat and transportation), accelerating the adoption of clean energy technology (i.e. technologies that do not release GHGs to the atmosphere) is essential for achieving a stable climate [29], [32]. The next section discusses the range of technical solutions for accomplishing the goals established above.

2.2.1 Technical Solutions to Energy Decarbonization

Many studies show that global and local economies can be supported by 100% VRE, such as wind, hydro, solar power, and storage [42]–[54]. Yet some countries that transition to majority VRE observe higher carbon emissions or a slower-than-expected reduction due to greater dependence on natural gas brought on by the relative unpredictability of natural energy sources [55]. Other studies demonstrate that firm baseload power, such as nuclear power, is necessary for the deep decarbonization of our energy systems [55]–[67]. While some countries are building new nuclear reactors, and the Nuclear Regulatory Commission (NRC) just licensed the design of the first small modular reactor design from NuScale [68], other places are shutting down their operating nuclear plants [69]. Further, the only examples of highly decarbonized electrical grids are places with a high penetration of hydro or nuclear power and the former is widely considered exhausted. There is nearly universal agreement that decarbonizing electricity requires phasing out fossil-fueled power plants and a significant expansion of clean electricity generators. Although many studies show the *feasibility* of a variety of energy mixes, the following is strongly debated in the literature.

1. Whether energy systems should be 100% renewable or if nuclear power and CCS should be included [28], [44], [64], [70].

2. What the role of distributed and decentralized energy sources in expanding our energy infrastructure should be [25], [71]–[77].

The strength of the technical arguments on both sides of these discussions combined with the distinct lack of sufficient policy agendas pursuing any of them [29], [31], suggests the existence of poorly articulated trade-offs and that technical solutions cannot be assessed from an engineering perspective, alone. Some researchers and policymakers disagree on technical grounds, while others disagree on the basis of institutional or systemic injustices. There are also differences in values. Indeed, the cultural theory of risk argues that our social constructions, rather than risks themselves, dictate what threats are recognized and their corresponding liabilities and benefits [78], [79]. Clean technologies like nuclear power and renewables, such as solar or wind power, are not only different in how they produce electricity but also in the values and paradigms they represent. Sometimes, communication fails because the question being discussed is not agreed upon either. Often, feasibility studies address the positivist question, "what is the least-cost pathway to the energy transition," while others consider more normative questions, such as "how should we proceed equitably?" Normative questions are qualitative and, therefore, inherently challenging to answer and require the application of ethics. Indeed there are many more normative questions than positive ones. Is perfect the enemy of good? How do we balance stakeholder preferences, upstream and downstream effects, and the necessity to respond quickly to climate change? Will this mix of influences lead to paralysis or inaction? Engineers typically do not possess the training nor the expertise to answer these questions thoroughly. Therefore, given climate change's complex, interacting, and disproportionate nature, engineering alone is ill-equipped to resolve the problem. Ideas from the environmental and energy justice literature offer a social perspective for addressing the risks and impacts of climate change hazards. The next section introduces the concept of energy justice and how this area of scholarship understands challenges related to climate change and energy systems.

2.3 Energy Justice

Energy justice is a conceptual and analytical tool regarding the ethical or normative dimensions of energy systems and addresses the systemic causes of burdens, and inequities [11].

There are many conceptions of justice; however, the most popular framework for understanding justice is a three-faceted approach originating from David Schlosberg: distributional, recognitional, and procedural justice [80]. Distributional justice relates to the fair distribution of resources, burdens, and responsibilities. Studies on distributional justice seek to address the normative question: how should a just society distribute the benefits it produces and *the burdens required to maintain it* [81]. Additionally, distributional justice considers *how* poor distributions are created [80]. Procedural (in)justice is defined as the presence of (un)fair and (in)equitable institutional processes of the state [80]. In other words, how decisions of societal import are made and who is involved in those decisions. Sovacool and Dworkin (2015) outline four elements of procedural justice: transparency, meaningful participation, impartiality, and avenues for redress [11]. Justice of recognition is the vaguest of the three tenets of justice and is frequently reduced to a component of either distribution or procedural justice [80], [82]. A common argument for this consolidation is that recognition is a precondition for achieving distributional justice or that achieving procedural justice necessarily includes recognition [80]. However, recognition is unique from distributive and procedural justices because it is concerned with a different family of injustice, namely, *misrecognition* [82]. van Uffelen (2022) suggests a nuanced definition of recognition justice as “the adequate recognition of all actors through love, law, and the status order” [82]. Sovacool and Dworkin (2015) offer a framework for assessing energy policies from a justice perspective. Table 2.1 map the relationships between justice-as-a-decision-making-tool from Sovacool & Dworkin, Paterson’s hazard response characterization, and Schlosberg’s triumvirate of justice.

Table 2.1: Different ways to operationalize justice concepts.

Schlosberg [80]	Sovacool & Dworkin [11]	Paterson et al. [27]
Distribution	Intragenerational Equity Intergenerational Equity Responsibility	Material Well-being Infrastructure
Procedure	Due Process Good Governance	Awareness Governance
Recognition	Availability[1] Affordability[1] Sustainability[1]	Relational Well-being

[1] van Uffelen [82] argues for this categorization.

Although Sovacool & Dworkin do not explicitly discuss recognition justice, it is a unique aspect of justice that can still be useful for contextualizing their recommendations. For example, due to the psychological pressures introduced by a lack of access to energy, either due to infrastructure or cost, interrupts relational well-being and is an injustice [82]. Further, (un)sustainable policies may be considered a misrecognition of the humanity of future generations.

Next, I examine the specific ways the social science literature understands how energy systems and their infrastructure (artifacts) contribute to the distribution of burdens.

2.3.1 Boundaries of Energy Systems

Previous work defined energy systems in purely technical terms as spatially, temporally, and topologically complex machines that coordinate the supply and demand of energy, especially electricity [57]. However, this definition neglects the ways energy systems may be used to construct and maintain power relations that contribute to inequitable distributions of burdens. Energy access is necessary to support complex modern economies and therefore possesses political power [83], [84]. The literature on the political economy of energy infrastructure locates this political influence in five distinct ways [84]. First, energy infrastructure affects competition and collaboration among nation-states in the geo-political sphere. The current situation in Ukraine makes this especially salient [85].

The second subset of the literature focuses on the process of energy infrastructure development and how these processes create social inequities. For example, energy policies that subsidize residential solar panels have not led to more equitable adoption of solar energy, with greater adoption in areas with higher income, among other social indicators [86]. Other popular arguments in favor of renewable energy assert that these energy sources are necessarily more egalitarian because the Sun and the wind cannot be (or have not yet been) privatized. Another is the urgency of climate change. Although these arguments have merit, they ignore or minimize the potential environmental and social consequences of energy planning that does not consider energy justice [83]. Large-scale energy projects in the Global South have already led to the dispossession of nearby indigenous communities and other key actors [87], [88].

Third, the development of energy infrastructure is not simply conducted via policy measures, but also in the manner governments activate the public imagination in favor of these policies [84], [89]. Jasanoff and Kim (2009) articulate this concept as 'socio-technical imaginaries,' which are simultaneously descriptive and prescriptive of possible energy futures established by governments in the national zeitgeist [89]. This concept is demonstrated by the discourse surrounding nuclear energy in the United States and South Korea [89] as well as in Japan [90]. Governments can employ 'grand narratives' related to national security, climate change, or modernization to enhance public support while minimizing genuine participation [84].

Fourth, the political power of energy infrastructure can be traced further to the cultural values and policy choices embedded in the design and operation of seemingly technical systems [84]. In other words, the design and implementation of energy infrastructure may be used as a vehicle for apparently unrelated agendas, a form of "policy-making by other means" [84], [91]. Edwards and Hecht (2010) refer to the co-constitution of technological and political order as '*technopolitics*,' demonstrating the tangible material and political outcomes of technological systems [92].

Finally, energy systems and their infrastructure possess a unifying quality through which new political identities may evolve [84].

From these various perspectives, we can observe that confining an energy system to its technical characteristics is woefully incomplete. I propose that an energy system is a spatially, temporally, and topologically complex machine that coordinates the supply and demand of energy and resources and acts as an important mediator of burdens that influence risks (such as risks from climate change). This thesis takes the important step of analyzing energy system planning and policy with this expanded definition.

The next section reviews current attempts to model energy systems and identifies gaps in conventional methods.

2.4 Modeling Energy Systems

ESOMs have broad utility, including forecasting future quantities, generating insight for policy development, or energy system planning for scheduling and acquisition [93], [94]. However, analyses using currently available ESOMs seldom consider the role of energy systems in creating and maintaining inequitable distributions of burdens. ESOMs vary significantly by the energy sectors they choose to model, the degree of physical detail, uncertainty quanitification, and forecasting capabilities. Table 2.2 summarizes the capabilities for a comprehensive list of energy system analysis tools. These tools are approximately sorted by mathematical formulation, e.g. explicit optimization or simulation. The "mixed-integer linear programming (MILP)" column indicates whether the framework uses a linear-programming approach to optimize an objective function. The "objective" column specifies the nature of the objective function if one exists. "Cost" objectives minimize total or annual energy costs, while "welfare" maximizes social welfare. Some entries have more than one objective listed. This means users may choose which objective to optimize. None of the tools in Table 2.2 are designed to handle simultaneous optimization (i.e., multi-objective optimization (MOO)). For those modeling frameworks that have an "objective" in Table 2.2, virtually all of them optimize system costs. EnergyScope is the only exception to this, which allows users to optimize GHG emissions [95]. The "uncertainty" column indicates a feature to algorithmically generate model runs for testing either parametric or structural uncertainties. For example, EnergyScope is *suitable* for uncertainty analysis (i.e., many runs are computationally tractable) but does not have any built-in capabilities [95]. Some tools, such as NEMS [96], incorporate uncertainty into their calculations via learning curves. However, these learning curves require assumptions about learning factors and technological "optimism" – which are themselves uncertain [96]. Table 2.2 also indicates whether the tool is a "public code." This simply means users can download and inspect the source code. Other considerations for openness, such as licensing and development, vary among the listed frameworks. The other columns simply indicate the existence of particular features rather than the relative maturity or sophistication of each feature.

Frameworks, such as MEDEAS [97], and MultiMod [98], are general equilibrium models which embed energy systems within the macro-economy and facilitate the modeling of strategic behavior. The latter formulates a non-linear problem with the Karush-Kuhn-Tucker optimality condition [98], as opposed to more traditional linear programming methods. Models of this type are helpful for analyzing the economy-wide influence of policies but lack sufficient operational detail to be prescriptive for energy system planning.

Agent-based models are useful for modeling the market behaviors of different actors, such as firms (which produce power), transmission operators, and consumers. The latter category is typically aggregated for tractability. Modeled behaviors include technology preferences [99], [100], risk aversion [99], financial characteristics [99], [101], and information asymmetry among agents [99], [101]. Due to agent heterogeneity, agent-based models are considered useful for capturing social phenomena [94], [102].

A further set of tools focus on simulating power flow and demand fluctuations. CAPOW [103] generates synthetic data with statistical methods to explore uncertainties in energy dispatch and extreme demand events, but does not include any investment optimization based on these uncertainties. CESAR-P, SAM, Demod, and DESSTinEE focus on modeling demand profiles [104]–[106]. CESAR-P models individual building demand for energy based on the physical parameters of the building. However, it has no dispatch or investment optimization capabilities. Other tools such as Pandapower, GridCal, and SciGRID power model the infrastructure aspects of electricity systems – transmission and distribution – rather than the optimal dispatch of electricity producers [107]–[109].

There is an overwhelming number of models with varying levels sophistication and capabilities. However, the inability to optimize any objective besides cost presents a significant gap in the existing space of energy modeling tools. Further, since none of these tools allow for multiple objectives, true trade off analysis is rendered impossible.

2.4.1 Economic Dispatch and Social Welfare

Linear programming (LP) or MILP are the dominant optimization approaches among the frameworks in Table 2.2. Economic dispatch models optimize the power output of *dispatchable* generators in a model system [54], [164]. They all share the same fundamental formulation.

Minimize

$$F(x) = \sum_i C_i x_i \tag{2.1}$$

subject to,

$$g(x, p) \leq 0.$$
$$x \in \vec{X}$$

where

$\vec{X}$ is the set of decision variables,

C_i is the *i-th* cost,

g is some linear inequality constraint,

p is some arbitrary parameter.

The exact formulation of Equation 2.1 may vary slightly across models, but the objective for most economic dispatch models is to minimize total cost. The near universality of a cost-based objective function comes from the concept of *social welfare maximization*. This concept is illustrated in Figure 2.4.

Table 2.2: Summary of ESOM frameworks.

Model	Citation	math model type	MILP	Objective	Transmission		Sector		Investment	Physical	Forecasting	Agent	Uncertainty	Public
						Heat	Electric	Transport	Optimization	Models		Based	Analysis	Code
AnyMOD	[110]	Optimization	✓	Cost		✓	✓		✓					✓
Backbone	[111]	Optimization	✓	Cost	✓	✓	✓	✓	✓		✓		SP	✓
Balmorel	[112]	Optimization	✓	Cost	✓		✓		✓					✓
Calliope	[113]	Optimization	✓	Cost		✓	✓	✓	✓					✓
CapacityExpansion	[114]	Optimization	✓	Cost	✓		✓		✓					✓
DIETER	[115]	Optimization	✓	Cost		✓	✓		✓					✓
Dispa-SET	[116]	Optimization	✓	Cost	✓		✓		✓					✓
ELMOD	[117]	Optimization	✓	Welfare	✓		✓		✓					✓
ELTRAMOD	[118]	Optimization	✓	Cost			✓		✓					
EMMA	[119]	Optimization	✓	Cost			✓		✓					✓
EOLES elec	[120]	Optimization	✓	Cost			✓		✓					✓
ESME	[121]	Optimization	✓	Cost		✓	✓	✓	✓				MC	
ESO-X	[122]	Optimization	✓	Cost			✓		✓					✓
EnergyRt	[123]	Optimization	✓	Cost			✓		✓					✓
EnergyScope	[95]	Optimization	✓	Cost, GHG		✓	✓	✓	✓					✓
Ficus	[124]	Optimization	✓	Cost			✓		✓					✓
FlexiGIS	[125]	Optimization	✓	Cost		✓	✓	✓						✓
GAMAMOD-DE	[126]	Optimization	✓	Cost			✓		✓					
GenX	[127]	Optimization	✓	Cost	✓		✓		✓				MGA	✓
GRIMSEL-FLEX	[25]	Optimization	✓	Cost		✓	✓		✓	✓				✓
HighRES	[128]	Optimization	✓	Cost		✓	✓		✓					
MARKAL	[129]	Optimization	✓	Cost		✓	✓	✓	✓				MC, SP	✓
METIS	[130]	Optimization	✓	Cost	✓	✓	✓		✓				MC	✓
Medea	[131]	Optimization	✓	Cost			✓		✓					✓
Oemof	[132]	Optimization	✓	Cost		✓	✓	✓	✓					✓
OPERA	[133]	Optimization	✓	Cost	✓	✓	✓		✓					✓
OSeMOSYS	[134]	Optimization	✓	Cost		✓	✓	✓	✓					✓
OnSSET	[135]	Optimization	✓	Cost	✓		✓		✓					✓
PLEXOS	[136]	Optimization	✓	Cost			✓		✓				MC	
POLES	[137]	Optimization	✓	Cost			✓		✓					
POMATO	[138]	Optimization	✓	Cost	✓	✓	✓							✓
PRIMES	[139]	Optimization	✓	Cost	✓	✓	✓	✓	✓					
PyPSA	[140]	Optimization	✓	Cost	✓	✓	✓	✓	✓	✓			MGA	✓
REMix	[141]	Optimization	✓	Cost	✓	✓	✓	✓	✓					✓
REopt	[142]	Optimization	✓	Cost		✓	✓		✓					✓
StELMOD	[143]	Optimization	✓	Cost	✓		✓		✓					✓
Switch	[144]	Optimization	✓	Cost	✓	✓	✓	✓	✓					✓
TIMES	[145]	Optimization	✓	Cost, Welfare		✓	✓		✓				SP	✓
Temoa	[146]	Optimization	✓	Cost		✓	✓	✓	✓				MGA, MC, SP	✓
TransiEnt	[147]	Simulation	✓	Cost	✓	✓	✓							✓
URBS	[148]	Optimization	✓	Cost	✓	✓	✓	✓	✓					✓
Genesys	[43]	Optimization and Simulation		Cost			✓		✓					
OpenTUMFlex	[100]	Optimization and Simulation	✓	Cost		✓	✓	✓			✓			✓
PowNet	[149]	Optimization and Simulation	✓	Cost	✓		✓			✓				✓
Renpass	[150]	Optimization and Simulation		Cost			✓							✓
SimSEE	[151]	Optimization and Simulation		Cost			✓			✓				✓
MEDEAS	[97]	Other				✓	✓	✓		✓			MC	✓
MultiMod	[98]	Other		Welfare	✓	✓	✓	✓	✓					
NEMS	[96]	Other	✓	Cost	✓	✓	✓	✓	✓		✓			
Breakthrough Energy Model	[152]	Simulation			✓		✓		✓					✓
CAPOW	[103]	Simulation	✓	Cost	✓		✓				✓		✓	✓
CESAR-P	[104]	Simulation					✓			✓	✓			✓
DESSTinEE	[105]	Simulation	✓	Cost	✓	✓	✓			✓				✓
Demod	[106]	Simulation				✓	✓			✓	✓		MC	✓
EMLab-Generation	[153]	Simulation		Cost			✓		✓				MC	✓
EnergyPLAN	[154]	Simulation		Cost	✓	✓	✓	✓	✓					
Energy Transition Model	[155]	Simulation					✓							✓
GridCal	[108]	Simulation			✓					✓				✓
LoadProfileGenerator	[156]	Simulation				✓	✓			✓	✓	✓		✓
Pandapower	[107]	Simulation			✓					✓				✓
Pvlib	[157]	Simulation				✓				✓	✓			✓
PyLESA	[158]	Simulation		Cost	✓		✓	✓		✓				✓
SAM	[159]	Simulation								✓	✓		PA	✓
SciGRID power	[109]	Simulation			✓		✓							✓
SimSES	[160]	Simulation					✓			✓				✓
AMIRIS	[101]	Simulation and Agent-based					✓		✓			✓		✓
ASAM	[161]	Simulation and Agent-based			✓		✓					✓		✓
EMIS-AS	[99]	Simulation and Agent-based	✓	Welfare	✓		✓					✓	✓	✓
Lemlab	[162]	Simulation and Agent-based	✓	Welfare			✓					✓		✓
MOCES	[163]	Simulation and Agent-based		Cost			✓			✓		✓		

Figure 2.4: Demonstration of "social welfare maximization." Plot a) shows the total surplus when the price is at equilibrium. Plot b) shows the total surplus when the price is artificially depressed.

In microeconomics, social welfare is identical to the sum of consumer and producer surplus. Therefore social welfare is maximized when the sum of these two quantities is maximized. Figure 2.4 shows this case on the left panel. However, suppose an economic policy capped the price of some product at a price lower than the equilibrium price. In that case, the consumer surplus expands, and the producer surplus contracts, as shown in the right panel of Figure 2.4. Nobody receives the "lost surplus" because suppliers do not produce more despite unmet demand for the product because the price is capped. Typically, modeling tools consolidate the demand curve to a single value. In this case, social welfare maximization is approximated by minimizing the total cost of energy [153]. This simplification is valid because demand for energy is highly inelastic [122], [165]–[167]. Figure 2.5 shows the impact of highly inelastic demand.

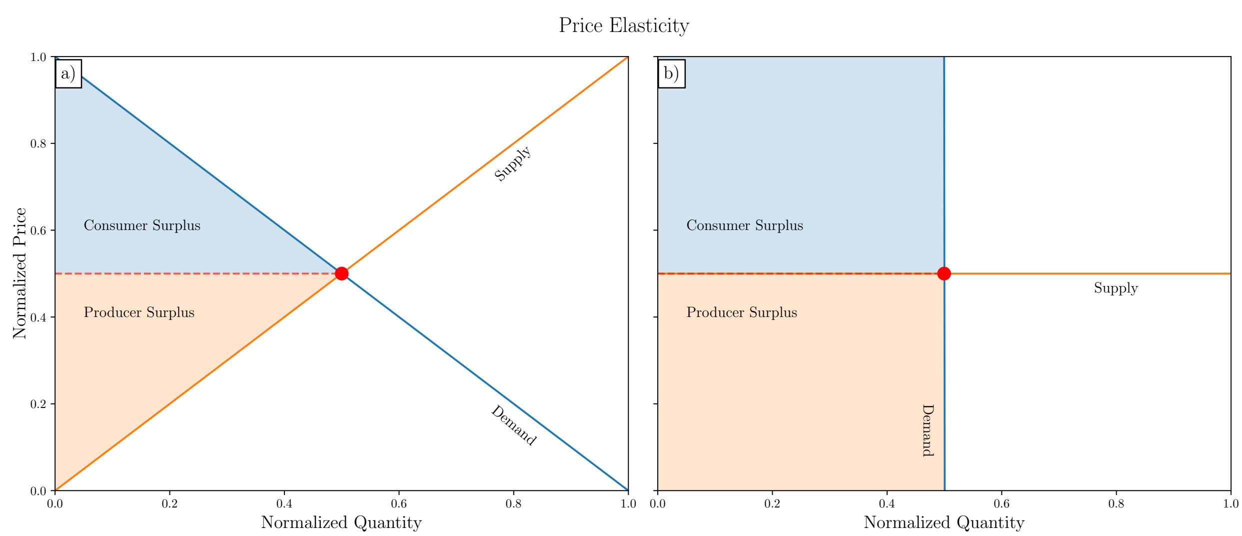

Figure 2.5: Demonstration of "price elasticity." Plot a) shows a typical supply-demand curve where changes in price lead to proportional changes in demand. Plot b) shows an inelastic demand where consumption does not change proportionally with price.

For an elastic good supply and demand are in proportion with each other. An increase in the supply leads to a proportional increase in demand via a reduced price, eventually returning to an equilibrium price (shown in Figure 2.5a). However, as Figure 2.5b demonstrates, an inelastic demand does not respond proportionally to changes in price, such that consumers become "price- takers," paying the price set by producers. Importantly, in the latter case consumer surplus is infinite and minimizing the energy cost through policy mechanisms does not create a lost surplus as shown in Figure 2.4b. Since electricity demand is highly inelastic, economic dispatch models minimize the cost of generating electricity. Although optimizing welfare, rather than the total cost, is useful for disaggregating multiple demands for the same commodity [117], this thesis adopts the former, simplified, approach to economic dispatch.

2.4.2 Accounting for Uncertainty

Due to the complexity of our energy system, handling uncertainty is one of the most important features for ESOMs [93], [94]. There are broadly two types of uncertainties: parametric and structural. The former refers to uncertainty around the value of some empirical quantity (e.g. price of fuel or the discount rate). In many cases, these quantities are better represented by *distributions* which may be sampled using formal methods like Monte Carlo (MC) or parametric analysis (PA) [14], [94]. Deterministic codes such as TEMOA, TIMES, or ESME use these techniques to generate many model runs. Another method for handling parametric uncertainty is stochastic programming (SP), where parameters are replaced with non-linear risk functions [94], [168]. Although parametric uncertainty is important the analysis of uncertain values is not a focus of this thesis.

Structural uncertainty relates to *unmodeled objectives* [93], [94], [169]. There are few formal methods to address structural uncertainty due to its qualitative nature. The most common approach to handling this type of uncertainty is using Modeling-to-Generate-Alternatives (MGA) to probe the near-optimal decision space [14], [54], [93], [127], [170]. DeCarolis wrote, "[p]olicy-makers often have strong concerns outside the scope of most models (e.g., political feasibility, permitting and regulation, and timing of action), which implies that feasible, sub-optimal solutions may be preferable for reasons that are difficult to quantify in energy economy optimization models" [93]. Therefore, an "optimal solution" may lie in the model's inferior space [93]. Section 3.5.1 details the implementation of MGA. However, this approach still requires an objective function, and the sub-optimal space is still within some tolerance of the optimal value of the defined optimization space. Further, the solutions generated by MGA still admit bias from policy-makers and does not require users to consider the equity implications of these alternative solutions.

Another strategy to handle structural uncertainty is optimizing multiple objectives simultaneously. However, some researchers dismissed this approach for the following reasons [93]:

1. structural uncertainty will always exist, regardless of the number of modeled objectives;
2. traditional MOO enables the exploration of a set of non-dominated solutions (i.e., the Pareto-front), but not the near-optimal space;
3. analyzing tradeoffs for problems with many objectives is tedious.

These critiques may explain the distinct lack of frameworks that apply MOO for energy system problems. However, there are important benefits to MOO (primarily the opportunity to analyze tradeoffs), and the lack of an energy system *framework* to apply this technique is one of the gaps this thesis fulfills.

2.5 Multi-objective optimization

A multi-objective problem may be formulated as

$$\min\{F_1(x), F_2(x), ..., F_i(x)\}, \tag{2.2}$$

subject to:

$$g(x,p) \leq 0.$$
$$x \in \vec{X}$$

where

$$
\begin{aligned}
&F_i \text{ is an arbitrary objective function,}\\
&g \text{ is a constraint,}\\
&p \text{ is an arbitrary parameter of } g,\\
&\vec{X} \text{ is the set of decision variables.}
\end{aligned} \tag{2.3}
$$

Where Equation 2.1 had a single objective $F(x)$ to minimize, Equation 2.2 has a *set* of objectives, $\{F_i(x)\}$. Rather than identifying a global minimum point, the solution to Equation 2.2 is a *set* of non-dominated points called a Pareto-front. Each point on this frontier cannot improve one objective without making another objective worse, hence "non-dominated." Generally, for competing objectives, there will be an infeasible space that is not attainable by the given combination of objectives. For a minimization problem, the space above the Pareto-front is the sub-optimal feasible space. This is the space that MGA promises to search for a corresponding single-objective problem. Figure 2.6 illustrates a set of solutions along a Pareto-front for an example problem from Multi-Objective Optimization in Python (`Pymoo`) [171], [172].

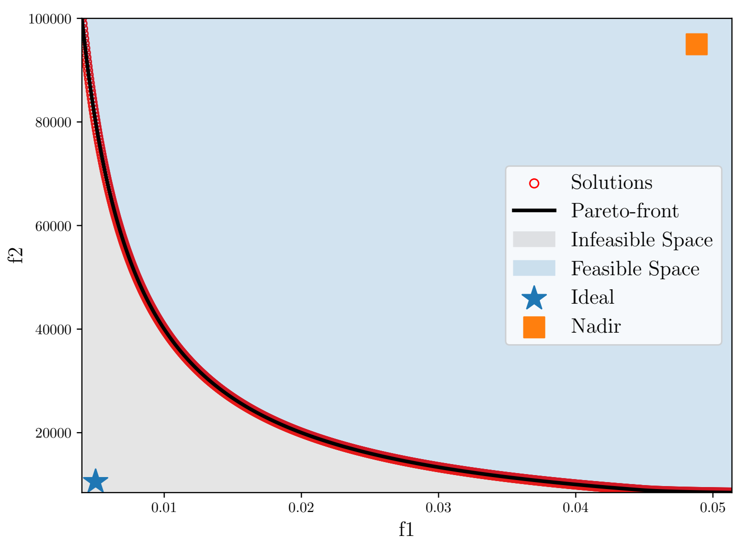

Figure 2.6: An example *convex* Pareto-front from `Pymoo` [171], [172].

There are broadly two classes of MOO algorithms for solving Equation 2.2, *scalarization* and *population-based* [173], [174]. Scalarization approaches map the multi-objective problem onto a set of single-objective problems using variation of parameters. In the weighted-sum (WS) algorithm, the objectives are assigned weights, w_i, and the aggregated objective becomes

$$\min \quad J(x) = \sum_i w_i F_i(x) \tag{2.4}$$

subject to:

$$\begin{aligned} &g(x,p) \le 0 \\ &x \in \vec{X} \end{aligned}$$

where

$$\begin{aligned} &F_i \text{ is an arbitrary objective function,} \\ &w_i \text{ is the weight for objective function } F_i \qquad (2.5) \\ &J \text{ is the aggregated objective,} \\ &g \text{ is a constraint,} \\ &p \text{ is an arbitrary parameter of } g, \\ &\vec{X} \text{ is the set of decision variables.} \qquad (2.6) \end{aligned}$$

These weights are varied in order to sample points along the Pareto-front.

Alternatively, the ϵ-constraint (EC) algorithm for scalarization chooses one objective from $\{F_n\}$ to solve and converts the others into constraints, whose bounds are denoted by ϵ. These bounds are varied until the desired number of points on the Pareto-front is reached [173], [174]. This problem can be written as

$$\min \quad F_j(x), \tag{2.7}$$

subject to:

$$\begin{aligned} &F_2(x) - \epsilon_j \le 0 \\ &\vdots \\ &F_i(x) - \epsilon_j \le 0 \\ &g(x,p) \le 0, \\ &x \in \vec{X}. \end{aligned}$$

The sub-problem, Equation 2.7, must be repeated for each $F_j(x)$ and corresponding ϵ_j in $\{F_n\}$.

Scalarization is attractive due to its simplicity. However, this approach is sensitive to problem convexity. WS will never be able to sample points in a concave region of the Pareto-front, and EC will have poorly spaced samples along a concave region. Further, these algorithms can only sample points on the frontier, not the sub-optimal feasible space. Thus supporting the critique of using MOO for handling structural uncertainty [93].

Fortunately, population-based algorithms, also called *genetic algorithms (GAs)* or *evolutionary algorithms*, resolve some of these issues by solving Equation 2.2 directly. GAs are based on the principle of natural selection. In a GA, such as Non-Dominated Sorting Genetic Algorithm-II (NSGA-II), an initial population is randomly generated using the problem's decision variables, the 'fitness' of this population (i.e., performance on each objective) is calculated, then a new population is selected from the 'fittest' (most optimal) individuals. This process continues until a convergence criterion is reached. The advantages of this method are

1. a guaranteed solution, regardless of convexity,
2. no prior knowledge is required to initialize the problem, as with EC,
3. greater diversity of solutions (i.e., spacing of points along the Pareto-front),
4. the sub-optimal space is sampled through the iterative process (though not uniformly).

Specifically, point four address one of the primary criticisms of using MOO to reduce structural uncertainty by obtaining points in the inferior region [175]–[177]. An additional advantage of GAs is the ability to incorporate more physics and simulations into the optimization procedure than LP, MILP, or scalarization allow [175] because MOOs can incorporate data from external models.

Previous work handled structural uncertainty using MGA which samples unique solutions from the sub-optimal space in a neighborhood around the global minimum for a single objective [93]. Researchers argue that this approach is valid because there will always be structural uncertainty and sampling the inferior region may offer insight for decision-makers. While structural uncertainty may persist it is not *irreducible*. By increasing the number of modeled objectives MOO reduces structural uncertainty. Further, ideas from MGA can be applied to MOO by efficiently sampling the near-optimal space [175]–[178]. The goal of MGA is to find a *reduced* set of maximally different alternatives to provide insight, where analyzing the full set of alternatives would be overwhelming [93], [178]. Figure 2.7 shows the near-optimal space around the Pareto-front from Figure 2.6.

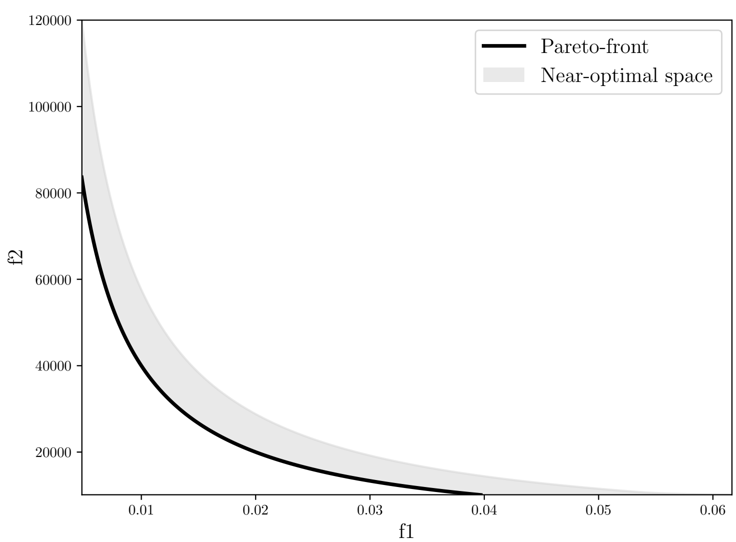

Figure 2.7: The near-optimal space around the Pareto-front.

For these reasons, this thesis explores energy systems optimization and the handling of structural uncertainty through MOO and GAs. Section 3.3 reviews the details of the GA used in this thesis.

2.5.1 Energy System Applications

It is well understood that engineering and policy problems, which include energy systems optimization, often require satisfying multiple antagonistic objectives [175]–[177], [179]. However, the application of MOO to energy systems in the literature is limited. Table 2.3 summarizes the current body of work. As before, the "public code" column only indicates if the source code is accessible. Additionally, the "sector" columns only indicate the presence of a feature, not the relative maturity or sophistication of the modeling. There are six "objective columns," indicating which objectives are considered the in the model or study. A "technology" objective might optimize a specific technology or set of technologies. For example, maximizing the percentage of renewable energy in a system. The "reliability" metric varies among studies, but generally refers to the potential for load loss. For all of the studies in Table 2.3, the "environmental" objective refers to GHG or "global warming potential" [180]. Although it could refer to other environmental impacts such as land use, water use, or thermal pollution.

Table 2.3: MOO used with energy systems.

Citation	Model	Algorithm	Objectives						Sector			
			Economic	Social	Environment	Reliability	Technology	User-defined	Heat	Electricity	Transport	Public Code
[181]		NSGA-II	✓			✓	✓			✓		
[182]		NSGA-II	✓				✓			✓		
[183]		NSGA-II	✓		✓				✓	✓		
[184]	Oemof-moea	NSGA-II	✓		✓				✓	✓	✓	✓
[185]	HYRES	GAToolbox	✓			✓				✓		
[186]		NSGA-II	✓		✓				✓	✓		
[187]		WS	✓		✓				✓	✓	✓	
[77]		NSGA-II	✓		✓				✓	✓		
[188]		NSGA-II	✓		✓				✓	✓		
[189]	SIREN	WS	✓		✓	✓				✓		✓
[180]		EC	✓		✓	✓			✓	✓		
[190]		NSGA-II	✓			✓				✓		
[191]		NSGA-II	✓			✓				✓		
[192]		NSGA-II	✓		✓				✓	✓		
[193]		EC	✓		✓	✓			✓		✓	
[194]		NSGA-II	✓		✓					✓		

Most of the studies in Table 2.3 used NSGA-II to identify the Pareto-front with a few using scalarization. Consistent with the trend shown in Table 2.2, every study in Table 2.3 uses some economic or "cost" metric as one of the objectives. Also consistent, is that none of these studies identified a metric to optimize over social concerns. Laha et al. [182] used fatalities per GWh and employment per GWh as criteria for social sustainability, but these were not objectives in their model, rather they were calculated *ex post facto* with scenario analysis. Riou et al. [181] investigated the tradeoffs among renewable share, reliability, and total cost. Their findings were consistent with single objective scenario analysis [62], that greater renewable penetration leads to greater costs and less reliable energy with a 100% renewable energy system being the least reliable or incurring the greatest costs [181].

Although previous work demonstrated the applicability of MOO to energy systems optimization, there are significant limitations.

- There are at most three modeled objectives [180], [181], [193].
- Where traditional ESOMs have many mature frameworks (as shown in Table 2.2, there are no frameworks that use MOO. Simultaneously, none of the studies in Table 2.3 developed a framework. Prina et al.

developed a bespoke and unlicensed model called "Oemof-moea," however this does not constitute a framework.

- None of the studies in Table 2.3 allow arbitrary user-defined objectives.
- None of the studies incorporate social metrics into the modeled objectives.

This thesis develops, `Osier`, a novel energy systems framework using MOO that fills these gaps by using GAs that allows for efficient modeling of many objectives, enabling user-defined objectives, providing the option to make metrics of interest either objectives or constraints, and incorporating ideas from MGA to provide insight from the sub-optimal objective space.

The next section outlines attempts to incorporate social justice concerns with energy system models.

2.6 Modeling and Quantifying Energy Justice

The dearth of studies that incorporate energy justice into ESOMs highlights the challenge of combining these techniques. The literature on energy justice and socio-technical transitions tend to derogate modeling efforts as cold and calculating [11], [195], and most models do not account for energy justice in either equations or analysis. However, there have been some notable attempts to bridge this gap. The following studies by Patrizio et al. (2020) [67] and Neumann & Brown (2021) [54] explicitly use ESOMs in their analyses. Although the works by Chapman et al. (2018) [196] and Mayfield et al. (2019) [197] do not use ESOMs as described in Section 2.4, these contributions quantify some features of their respective energy systems and how they relate to notions of energy justice and equity.

Patrizio et al. (2020) conducted a technology-agnostic 'social equity' scenario that maximized the gross value added (GVA) of several countries' energy systems rather than minimizing the total cost [67]. GVA is also distinct from social welfare because it measures contributions to gross domestic product (GDP) from individual producers rather than maximizing surplus. This metric enables sector-specific analysis of the impacts of energy infrastructure on employment and sales. Equity, in this context, is identical to socioeconomic development as measured by GDP. Using this definition of equity, the researchers looked at a socio-technical transition for three countries: Spain, the United Kingdom, and Poland. They found that a 100% renewable energy system would reduce labor compensation by 50-60% in the UK and Poland but could increase benefits in Spain. They argue this is due to the outsourcing of manufacturing and mining jobs in the former cases, while Spain has enough domestic resources to accommodate the transition. The researchers did not analyze possible shifts in power dynamics related to the energy systems, but they did identify that there is no one-size-fits-all solution to achieving net-zero carbon emissions.

Neumann & Brown (2021) performed a detailed analysis of the European energy system considering the expansion of transmission networks and energy producers for a 100% renewable energy system under cost minimization [54]. They also used a novel formulation of MGA to identify the boundaries of the feasible space for each technology within different levels of tolerance. This study uses Lorenz curves and Gini coefficients to measure the uniformity of the distribution of energy production and consumption. In other words, the most equitable distribution of energy resources would accord with energy consumption [54]. The researchers conclude that wind power and greater transmission capacity are associated with less regional equity, while solar power and storage technologies lead to a more even distribution of the power supply. This is useful for measuring the distribution of energy benefits from the energy system but does not consider the distribution of costs nor consider regional preferences.

Chapman et al. (2018) looked at the energy justice implications of transitioning coal plants to renewable energy projects for the nearby communities [196]. They measure distributional justice with "relative equity" and "policy burden." Relative equity accounts for factors such as GHG reduction, employment, electricity cost, and health impacts. Policy burden is a weighted value according to the income level of each community. These two quantities were plotted together to identify a retirement schedule that maximizes equity outcomes and ensures that burdens are borne by the most capable communities [196]. Additionally, the researchers argue that by using equity measures to inform policy choices, those policy decisions are more procedurally just. However, this neglects meaningful participation and may or may not address decision-making transparency [11]. Further, this study does not consider how replacing dispatchable suppliers with VRE will affect the availability and affordability of electricity [11]. This latter challenge could be addressed by incorporating methods from the ESOM literature. The former issue of decision-making transparency is one of the motivations for this thesis.

Mayfield et al. (2019) quantified the social equity implications for the expansion of natural gas infrastructure in Appalachia using spatial and temporal metrics such as job-years generated by greater gas development, premature deaths caused by air pollution, changes in poverty and income, and the distribution of these various benefits along regional, racial, and economic lines. Additionally, they identified some of the intergenerational equity impacts of climate change and expanded gas infrastructure.

2.6.1 Enabling Procedural Justice Through Energy Models

Traditionally, ESOMs are used to inform policy-makers [198] in order to infuse policy choices with an appearance of objectivity. Indeed, some of the studies reviewed in the previous section argue that this infusion will lead to greater procedural and recognitional justice outcomes as long as the policies maximize some measure of energy justice [196], [199]. However, these types of detailed analyses may also be used to dismiss concerns or opposition from the public due to insufficient 'technical expertise' [200]. Further, without meaningful participation from the affected public, this approach is further entrenches procedural injustices. To credit the energy modeling community, there is significant awareness of the importance of transparency and repeatability in the space [14], [132], [201]–[203]. Yet these two goals are challenged by the computational resources required to run the more complex and detailed models, as well as the learning curve necessary to understand and modify the model inputs themselves. There has been some effort to reduce this learning curve and make modeling itself more accessible. Frameworks such as METIS, EnergyRT, and Python for Generating Energy Systems (`PyGenesys`) all emphasize reproducibility, user-friendliness, and a shallower learning curve [123], [130], [204]. The creators of METIS state their goal is to "close the gap between modelers and policy-makers, enabling policy-makers to become modelers" [130]. However, these frameworks do not offer computational resources to run their models. The Tools for Energy Model Optimization and Analysis (`Temoa`) project offers limited cloud computing capabilities, free of charge [205]. However, the responsibility for creating an input file still falls to the user, which can be overwhelming even for experienced modelers. Finally, it's not clear that perfectly accessible and transparent modeling tools will translate to more procedurally just policy-making. The next section outlines one method used to address this challenge.

2.6.2 Participatory value evaluation

Even if the public could use modeling tools, their testimony may still be dismissed due to a 'lack of expertise.' However, the public has preferences that should be incorporated into decision-making. Additionally, community members are frequently able to assess trade-offs when presented with them. Participatory value evaluation (PVE) is one method for translating community preferences into just policy outcomes. Researchers in the Netherlands developed this method to enhance democratic participation and infuse policies with genuine feedback from constituents [206]. They observed that a common method of assessing social impacts is willingness to pay (WTP), which is the maximum price an individual is willing to pay for a good or service, yet individual purchasing habits do not necessarily reflect their views on public policy due to the relative salience of moral considerations [206]. With PVE, participants can allocate a specific amount of the public budget for certain policies, including levying or reducing taxes for greater or lesser government spending [206]. Researchers applied PVE in three different settings, mobility and transportation [207], flood risk projects (i.e., a climate hazard *infrastructure* response) [208], and with a phaseout of natural gas [209]. Importantly, the studies also measured the impact of these interventions and found that PVE enables participation from people that do not typically participate (recognition), the results were useful for decision-making and participation was meaningful for the majority of subjects [209]. Although previous applications of PVE focused on economic policy levers, this approach offers a promising pathway toward identifying equitable and just energy mixes for the future.

In summary, climate change is a multi-dimensional existential threat to society. Transitioning to a zero-carbon economy by decarbonizing our energy systems may prevent the worst outcomes of climate change. However, energy systems do not only transport electrons and gas but also mediate socio-political power. Therefore this transition must be done equitably in order to avoid entrenching further injustices. The existing energy system modeling tools and literature routinely ignore the social dimensions of these systems and forego true trade-off analysis. Additionally, it's unclear whether improving these modeling practices will correspond to just energy policy outcomes. This thesis attempts to bridge the gap between energy system modeling and energy justice by developing a novel framework that allows multiple, and perhaps non-economic, objectives and is designed for transparency and usability by non-modelers to inform energy policy decisions. A framework such as the one developed in this thesis may be used in conjunction with a policy process like PVE to fully enclose the triumvirate of energy justice tenets: distribution, procedure, and recognition.

Chapter 3

Methods and Data

This chapter is split into two broad sections, which describe the technical and qualitative methods used in this thesis. The first section covers the technical details of `Osier`, the novel framework developed by this thesis, and discusses the capacity expansion model `Temoa` used as a benchmark for `Osier`. Second, the qualitative section discusses the interview questions and the analysis methods.

3.1 Open source multi-objective energy system framework

Open source multi-objective energy system framework (`Osier`) is a novel open-source energy system modeling framework for multi-objective optimization. There are currently no ESOMs that enable MOO and `Osier` fills that gap. Figure 3.1 illustrates the flow of data into and within `Osier`.

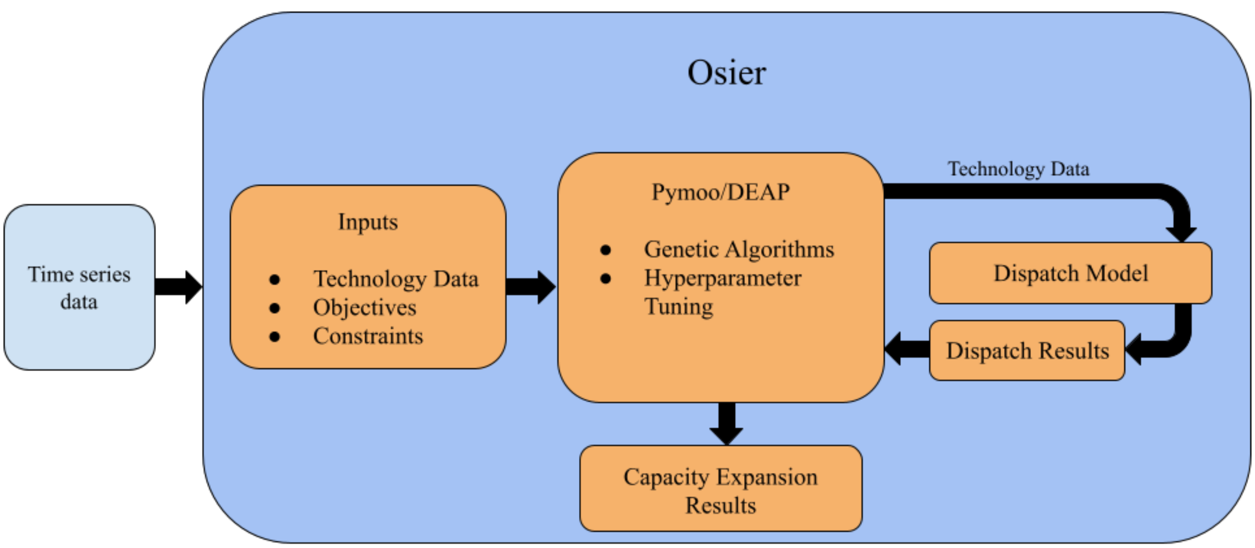

Figure 3.1: The flow of data into and within `Osier`

Technology data, objectives, constraints, and a dispatch model are all features within `Osier`, while `Pymoo` drives the optimization of these objectives. The dispatch model is independently executable for inspecting specific test cases and mapping solutions from other solvers onto `Osier`'s objective space. The next section elaborates on the dispatch model's formulation.

3.2 Economic Dispatch

The economic dispatch model minimizes the generation cost subject to physical constraints but does not optimize capacity investments. The complete set of equations for the model is detailed below.

Minimize:

$$\left(\sum_{t}^{T}\sum_{g}^{G}\left[C_{g,t}^{fuel}+C_{g,t}^{vom}\right]x_{g,t}\right)+\left(\sum_{t}^{T}\sum_{g}^{S}x_{g,t}c_{g,t}\pi\right) \tag{3.1}$$

such that,

1. The generation meets demand, less the amount of energy stored or curtailed, within a user-specified tolerance (undersupply and oversupply),

$$\left[\sum_{g}^{G}x_{g,t}-\sum_{g}^{S}c_{g,t}\right]\geq(1-\text{undersupply})\,\mathrm{D}_t \quad \forall \quad t\in T,S, \tag{3.2}$$

$$\left[\sum_{g}^{G}x_{g,t}-\sum_{g}^{S}c_{g,t}\right]\leq(1+\text{oversupply})\,\mathrm{D}_t \quad \forall \quad t\in T,S, \tag{3.3}$$

2. A generator's production, x_g does not exceed its capacity at any time, t

$$x_{g,t}\leq\mathbf{CAP}_g\Delta\tau \quad \forall \quad g,t\in G,T \tag{3.4}$$

3. A generator's ramping rate is never exceeded,

$$\frac{x_{r,t}-x_{r,t-1}}{\Delta\tau}=\Delta P_{r,t}\leq\rho_g^{up}\mathbf{CAP}_g\Delta\tau \quad \forall \quad r,t\in R,T, \tag{3.5}$$

$$\frac{x_{r,t}-x_{r,t-1}}{\Delta\tau}=\Delta P_{r,t}\leq-\rho_g^{down}\mathbf{CAP}_g\Delta\tau \quad \forall \quad r,t\in R,T, \tag{3.6}$$

4. Storage capacity for each storage technology is never exceeded

$$\mathbf{SOC}_{s,t}\leq\mathbf{CAP}_s^S \quad \forall \quad s,t\in S,T, \tag{3.7}$$

5. Storage discharge cannot exceed stored energy.

$$x_{s,t}\leq\mathbf{SOC}_{s,t} \quad \forall \quad s,t\in S,T, \tag{3.8}$$

6. Storage charge rate cannot exceed unit capacity

$$c_{s,t}\leq\mathbf{CAP}_s\Delta\tau \quad \forall \quad s,t\in S,T, \tag{3.9}$$

where,

$$
\begin{aligned}
G =&\ \text{the set of all generating technologies,}\\
R =&\ \text{the set of all ramping technologies,} \quad R \subset G,\\
S =&\ \text{the set of all storage technologies,} \quad S \subset G,\\
T =&\ \text{the set of all time periods in the model,}\\
D_t =&\ \text{the demand at each time period, } t,\\
\mathbf{CAP}_g =&\ \text{the capacity of the } g\text{-}th \text{ technology} \quad [MW]\,,\\
\mathbf{CAP}_g^S =&\ \text{the storage capacity of the } g\text{-}th \text{ technology} \quad [MWh]\,,\\
\mathbf{SOC}_{s,t} =&\ \text{the state of charge of the } g\text{-}th \text{ technology at time } t \quad [MWh]\,,\\
\Delta\tau =&\ t_{i+1} - t_i \quad \forall \quad t_i \in T \quad [h]\,,\\
x_{g,t} =&\ \text{the energy produced by generator, } g\text{, at time, } t \quad [MWh]\,,\\
c_{s,t} =&\ \text{the energy stored by storage technology, } s\text{, at time, } t \quad [MWh]\,,\\
\rho_g =&\ \text{the up/down ramp rate for technology, } g \quad [-]\,,\\
\pi =&\ \text{A small penalty for simultaneous charging and discharging.}
\end{aligned}
$$

The second term in the objective function, Equation 3.1, represents a minor penalty to prevent the unphysical behavior of simultaneous charging and discharging from storage technologies. I used this approach because constraining this behavior requires a binary variable that makes the problem non-convex and therefore requires a more sophisticated solver. A small but sufficiently large π will always nullify the penalty term. This dispatch model reflects the minimum physical constraints for an energy system without considering fine-scale operational details such as frequency control. Equation 3.1 assumes that the retail cost for generating electricity is identical to the marginal cost of producing electricity.

3.3 Genetic Algorithms

Rather than rely on LP to model future capacity requirements, in this thesis, GAs assume the role of investment optimizer. GAs share a fundamental algorithmic structure, which is [171]

1. **Initialize** a starting population of N_p individuals, where each individual has a set of "genes" that are randomly chosen from the bounds of the decision variables.
2. Each individual in the population is **evaluated** for "fitness."
3. The **fittest**, N_f individuals "survive" and persist in the next generation.
4. A "selection" operator **chooses** among the surviving individuals to mate.
5. The parents are **combined** using a "crossover" operator, thereby filling the remaining $N_p - N_f$ individuals for the next generation.
6. The offspring are finally **mutated** with some probability, μ, to improve genetic diversity.

Figure 3.2 illustrates the flow of these steps applied to an energy systems model.

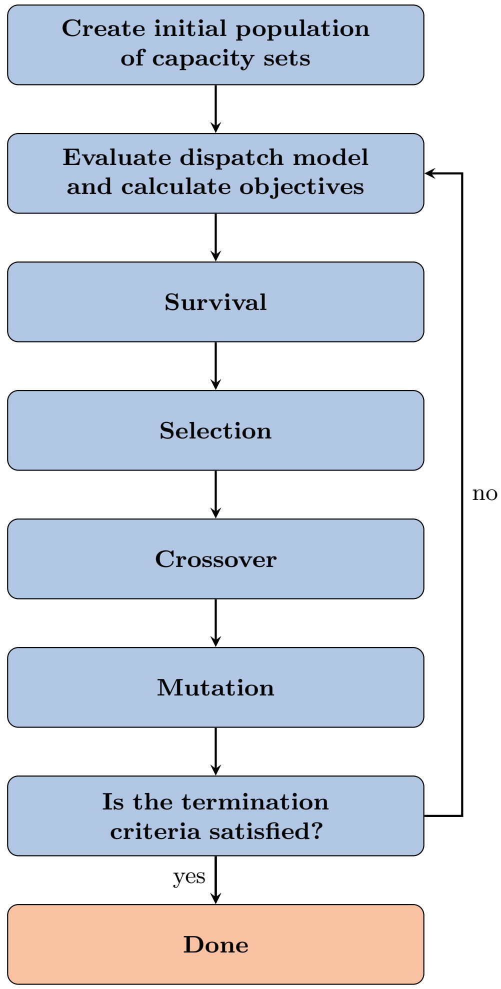

Figure 3.2: The basic flow of the GA used in this thesis.

3.3.1 Specific genetic algorithms

The variety of GAs comes from different types of operators being applied to the selection, crossover, and mutation steps. Section 2.5 showed that NSGA-II is a popular genetic algorithm choice. However, this algorithm performs poorly with greater than three objectives [210], [211]. In this thesis, I use a more modern algorithm, Unified Non-Dominated Sorting Genetic Algorithm (UNSGA-III). UNSGA-III builds on its predecessors NSGA-II and Non-Dominated Sorting Genetic Algorithm-III (NSGA-III) by unifying efficient solutions of mono-, multi-, and many-objective problems in a single algorithm.

NSGA-II improves on the basic GA by introducing a more sophisticated mating and selection algorithms. Instead of random selection, the individuals are sorted by rank (i.e. fitness) and crowding distance in binary tournament mating selection. The crowding distance is simply the Manhattan distance between individuals. A greater crowding distance is desirable to preserve diversity and since the extreme points are maximally diverse they should always persist and are therefore assigned a crowding distance of infinity [210].

The successor to NSGA-II, NSGA-III, enhances the many-objective capabilities of the former by introducing reference directions. Reference directions are used for initialization and the survival steps. In addition to fitness, individuals are chosen based on their proximity to a reference line, thus ensuring population diversity which greatly important for many-objective problems. Since diversity is handled by reference directions, individuals are selected randomly for mating. References directions are rays passing through uniformly spaced points on the unit simplex [211], [212]. In this thesis, I use the Riesz s- Energy method described by Blank et al. to calculate these points for a problem with an arbitrary number of objectives [212]. Figure 3.3 illustrates a set of initialized reference directions.

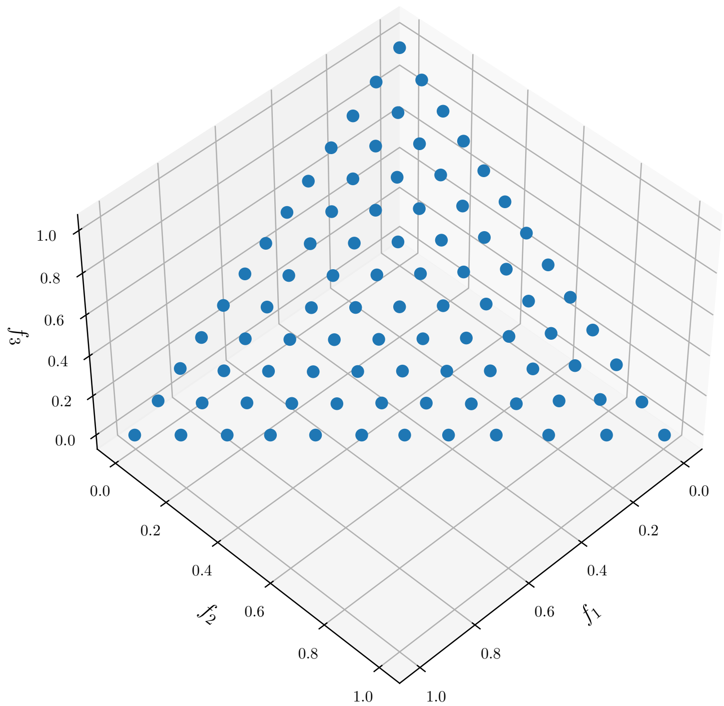

Figure 3.3: A set of reference directions for a three-objective problem.

NSGA-II is useful for mono- and multi-objective functions while NSGA-III is better for many-objective problems. UNSGA-III can handle any number of objectives by introducing the binary tournament from NSGA-II and reducing to the most efficient algorithm for the problem at hand [211]. Chapter 4 demonstrates these three algorithms in

3.3.2 Hyperparameter Tuning

Similar to other machine learning models, GAs have several hyperparameters that must be tuned for optimal behavior. These hyperparameters include probabilities for mutation, crossover, and selection, as well as the number of parents, number of offspring, and population size. Determining ideal hyperparameters is often performed using either a grid search or random sampling [213]. This thesis adopts the approach from Blank and Deb [171] using a genetic algorithm to identify the ideal hyperparameters. A problem is converted into a single objective problem using the desired algorithm, then a second genetic algorithm drives the problem where the decision variables are hyperparameters of the desired algorithm.

3.3.3 Convergence

There are several ways to stop a simulation in `Pymoo`. A simulation may end after reaching

1. a specified end time (e.g., 100 minutes),
2. a specified number of evaluations or iterations (e.g., 500 individual evaluations or 20 generations),
3. a tolerance value in the design space,
4. a tolerance value in the objective space.

It is possible that criteria 3 and 4 will never be met; therefore, they are often combined with either of the first two criteria. The fourth convergence criterion is the most interesting due to the challenge of calculating an appropriate metric. This thesis uses the weakly Pareto-compliant algorithm inverted generational distance plus (IGD+) over the more common hypervolume calculation due to its reduced computational requirements [214].

3.3.4 `Pymoo` and `DEAP`

The ESOM framework developed in this thesis is built on top of `Pymoo` and Deep Evolutionary Algorithms in Python (`DEAP`). `Pymoo` is an open-source library for GAs developed by the creators of NSGA-II and UNSGA-III [171]. This package implements several GAs out-of-the-box and offers a set of visualization tools and hyperparameter tuning. `DEAP` is another open-source library offering a toolkit for constructing GAs and therefore has fewer prepackaged algorithms than `Pymoo`. There are robust reasons to use both libraries, so `Osier` facilitates both.

3.4 Objectives

There are many possible objectives to optimize. This section summarizes a few of them and how they may be calculated in `Osier`. Due to `Pymoo`'s structure, all objectives are minimized. Therefore, if users wish to maximize some quantity, it must be negated first.

3.4.1 Per-unit-capacity

Some quantities of interest depend on the *capacity* of each technology. For example, land use of different energy producers is often reported as a power density MW/km^2. A general power density may be MW/unit. The objective function for these quantities reads

$$\mathcal{K} = \sum_{g}^{G} \mathbf{CAP}_g \kappa_g, \tag{3.10}$$

Where

$$\kappa = \text{the power density of the } g\text{-}th \text{ technology} \quad \left[\frac{-}{MW}\right]. \tag{3.11}$$

Table 3.1 lists some example objectives could be minimized or maximized.

Table 3.1: Example objectives on a per-unit-capacity basis.

Quantity	Units (per MW)
Land Use	[km^2]
Employment	[jobs]
Capital Cost	[$]
Fixed O&M Cost	[$ / year]

3.4.2 Per-unit-energy

Some quantities of interest depend on the *amount of energy produced* by each technology. For example, carbon emissions only occur when a coal or natural gas plant burns fuel. A general energy density may be in MWh/unit. The objective function for these quantities reads

$$\mathcal{E} = \sum_{g}^{G} \xi_g \sum_{t}^{T} x_{g,t}, \tag{3.12}$$

where

$$\xi_g = \text{the energy density of the } g\text{-}th \text{ technology} \quad \left[\frac{-}{MWh}\right]. \tag{3.13}$$

Table 3.2: Example objectives on a per-unit-energy basis.

Quantity	Units (per MWh)
GHG Emissions	[kg]
Water Use	[L]
“Safety”	[deaths]
Fuel Cost	[$]
Variable O&M Cost	[$]

3.4.3 Reliability and Predictability

Reliability has many definitions in the literature and it also depends heavily on the dispatch method. A hierarchical flow, which dispatches energy based on a set of rules (as opposed to true cost minimization), may simply report the fraction of hours when electricity demand was not met by the model [181], [185], [190], [191]. In an LP or MILP problem, electricity demand must be satisfied at all times. Thus reliability may be translated into a cost by determining consumers’ WTP for electricity [215], [216]. However, this thesis relates system reliability to price volatility and net demand predictability. Since the price of electricity is determined by matching supply and demand, the price will spike when supply and demand are out of phase. For instance, geopolitics may cause the supply of natural gas to drop, increasing the spot price of electricity. Or, more commonly, the availability of solar and wind resources may fall unexpectedly, leading to a greater demand for backup energy. Both of those examples are difficult to predict; otherwise, fuel reserves could be deployed, avoiding the price shock. Thus, I propose that measuring the predictability and volatility of an energy system is an appropriate proxy for reliability. Additionally, minimal price volatility is considered an aspect of energy justice [11], [82].

In this thesis, I measure the predictability of hourly electricity prices and net demand using a measure from complexity science, weighted permutation entropy (WPE) [217]. Permutation entropy, the precursor to WPE, is essentially the Shannon entropy for particular sequences of values called 'motifs' [218]. WPE expands on this concept by weighting each instance of a motif by its variance [217], [219]. WPE is defined as

$$H_w(m) = -\sum_{\pi\in\Pi} P_w(\pi)\log_2(P_w(\pi)) \tag{3.14}$$

where

$$\begin{aligned}
\pi &= \text{a particular motif,} \\
P_w &= \text{the probability of a given motif, } \pi, \\
&= \frac{\sum\limits_{j\leq N} w\left(x_j^{(m,\tau)}\right)\cdot\delta\left(\phi\left(x_j^{(m,\tau)}\right),\pi_i\right)}{\sum\limits_{j\leq N} w\left(x_j^{(m,\tau)}\right)}
\end{aligned} \tag{3.15}$$

and

$$\begin{aligned}
w\left(x_j^{(m,\tau)}\right) &= \text{the weight of a particular vector} \\
&= \frac{1}{m}\sum_{j}^{m}\left(x_j^{(m,\tau)} - \bar{x}\right)^2, \qquad (3.16) \\
\phi(\cdot) &= \text{the ordinal pattern of a vector,} \\
\delta(\cdot) &= \text{Kronecker delta,} \\
m &= \text{the embedding dimension,} \\
\tau &= \text{the time delay.}
\end{aligned}$$

There are other reliability metrics in the literature, frequently employing some variation on the "spread" of data through standard deviation or mean squared error [220]–[222]. However, these metrics are unbounded and do not contain any information about the underlying dynamics that produce a certain distribution. Whereas WPE can indicate a theoretical ceiling on predictability [219]. Importantly, WPE works for systems where the underlying dynamics are unknown. The Hurst exponent is another measure of predictability, but it too has drawbacks, such as computational expense and a stationarity requirement [223], [224]. This thesis uses the WPE implementation I contributed to the open source package `PyEntropy` [225].

3.4.4 User-defined Objectives

A key feature of `Osier` is the ability for users to define their own objectives and make it relatively easy to do so. This feature is required because modelers cannot know *a priori* every objective that users might be interested in optimizing. While `Osier` ships with some standard objective functions, allowing users to create their own objectives makes every model bespoke. *Any quantitative metric may be used as an objective in `Osier`.* Every objective function has at least two arguments, the list of technologies used in the model and the solved dispatch model. Users will never have to pass these arguments manually since `Osier` will automatically call the function during a simulation. One example of a user-defined objective might be technology readiness. This objective is independent from the energy produced and could be weighted by the capacity but is not a per-unit-capacity objective. The values of the readiness parameter must be passed to each `Technology` object, which can be accessed at run-time. Code listing 1 shows the basic approach to creating a new objective.

```python

nuclear.readiness = 9
fusion.readiness = 3

technology_list = [nuclear, fusion]

def osier_objective(technology_list, solved_dispatch_model):
    """
        Calculate the capacity-weighted technology readiness
        score for this energy mix.
    """

    total_capacity = np.array([t.capacity for t in technology_list]).sum()

    objective_value = np.array([t.readiness*t.capacity
                                for t in technology_list]).sum()

    return objective_value / total_capacity
```

Listing 1: The fundamental way to create a novel objective in `Osier`.

Importantly, because all technologies in `Osier` are Python objects, users can add attributes at will. Such as the technology readiness level as shown in Code listing 1.

3.4.5 Constraints

Besides the physical constraints defined in Section 3.2, `Osier` does not have any default constraints. This is because each additional constraint corresponds to an additional assumption and will affect the trade-off analysis that makes MOO so powerful. However, there are some circumstances where the optimal solutions are still infeasible in practice. For instance, if a community wants to determine the best energy mix according to their unique objectives, this community might not have the budget for even a least-cost solution because the capital requirements are too high. Therefore, they must constrain the capital cost for their modeling problem. Thus, `Osier` enables the following:

1. Users may define their own constraints.

2. Any objective function may be transformed into a constraint.

This feature makes `Osier` unique among ESOMs. Single-objective ESOMs can never account for unique situations such as the one suggested above, nor any other bespoke considerations. In the case above, the capital cost may constrain the problem while still minimizing the total cost. The solutions under these conditions will have a higher total cost but could be achievable in the near term due to meeting capital cost requirements.

3.5 Temoa and PyGenesys

This thesis uses the tools `Temoa` and `PyGenesys` to establish benchmark results for a typical ESOM. `Temoa` is an open-source ESOM developed at North Carolina State University that uses MILP to develop capacity-expansion scenarios [226]. The key benefits of `Temoa` are its open-source code, open data, and built-in uncertainty analysis capabilities. These features address the need for greater transparency in ESOM modeling and robust assessment of future uncertainties [102], [146]. `PyGenesys` is another open-source code, developed by this thesis' author, that wraps around `Temoa` facilitating rapid development of `Temoa` models and enabling sensitivity analyses using a templated approach [57], [204]. These features of `PyGenesys` reduce the learning curve and the cost of producing unique models in `Temoa` [57].

A single `Temoa` run minimizes total system cost [226],

$$C_{total} = C_{loans} + C_{fixed} + C_{variable} \tag{3.17}$$

where

$$\begin{aligned} C_{loans} &= \text{the sum of all investment loan costs,} \\ C_{fixed} &= \text{the sum of all fixed operating costs,} \\ C_{variable} &= \text{the sum of all variable operating costs.} \end{aligned}$$

Each of these terms is amortized over the model time horizon. The decision variables include the generation from each technology at time, t, and the capacity of each technology in year, y. The dispatch model deviates slightly from the model described in Section 3.2 by making the initial storage level for energy storage technologies a decision variable, whereas the dispatch model used in this thesis does not optimize initial storage and assumes energy storage starts at zero. The detailed formulation of `Temoa`'s constraints and equations are available online [226].

3.5.1 Modeling-to-Generate-Alternatives

`Temoa`'s built-in method for uncertainty analysis is the Hop-Skip-Jump algorithm (HSJ) formulation of MGA. This algorithm is designed to handle *structural* uncertainty, which presumes to account for unmodeled objectives. The steps for HSJ are [57], [93]:

1. obtain an optimal solution by any method,
2. add a user-specified amount of slack to the objective function value from the first step,
3. use the adjusted objective function value as an upper bound constraint,
4. generate a new objective function that minimizes the sum of all decision variables,
5. iterate the procedure,
6. stop the MGA when no significant changes are observed.

The mathematical formulation of this algorithm is to minimize:

$$p = \sum_{k \in K} x_k, \tag{3.18}$$

subject to:

$$f_j(\vec{x}) \leq T_j \quad \forall \quad j, \tag{3.19}$$
$$\vec{x} \in X, \tag{3.20}$$

where

$$\begin{aligned} p &= \text{the new objective function,} \\ x_k &= \text{the } k^{th} \text{ decision variable with a nonzero value in previous solutions,} \\ f_j(\vec{x}) &= \text{the } j^{th} \text{ original objective function,} \\ T_j &= \text{the slack-adjusted target value,} \\ X &= \text{the set of all feasible solutions.} \end{aligned}$$

This procedure results in a small set of maximally different solutions for modelers to interpret. In this way, MGA efficiently proposes alternatives that may capture unmodeled objectives, such as political expediency or social acceptance. However, this method depends on a single objective function which does not guarantee that these alternative solutions will be optimal or near-optimal for any other measurable objective.

I created `PyGenesys` as an initial exploration on repeatable analysis and extending the functionality of an existing ESOM. While successful in that regard, `PyGenesys` could not overcome `Temoa`'s inherent limitations on optimizing multiple objectives and the inability to modify its objective function. Addressing these limits led to my developing `Osier`.

3.6 MGA with multi-objective optimization

This thesis applies some ideas from MGA to the analysis of the sub-optimal space from a multi-objective optimization problem. Due to their iterative process, GAs naturally generate many samples in a problem's feasible space. However, this does not lead to a "limited set" of solutions but rather a potentially infinite set. Some literature developed GAs that directly use MGA in the iterative process [176], [177]. However, existing Python libraries such as `Pymoo` and `DEAP` do not implement these methods, and the challenge is not an inability to sample the sub-optimal space, but rather to provide a comprehensible subset of solutions. The algorithm I developed in this thesis to search the near-feasible space is the following:

1. Obtain a set of Pareto-optimal solutions *using any GA*.

2. Decide on a slack value (e.g., 10% or 0.1), which represents an acceptable deviation from the Pareto front.

3. Create a "near-feasible front" where the coordinates of each point are multiplied by unity plus the slack value. This is equivalent to relaxing the objective functions and converting them to a constraint.

4. Every individual is checked if all of its coordinates are
    - below all of the coordinates for at least one point on the near-feasible front and
    - above all of the coordinates for at least one point on the Pareto front.
5. Lastly, the set of interior points may be randomly sampled to further restrict the number of analyzed solutions.

Figure 3.4 and Figure 3.5 demonstrate this algorithm with 10 percent slack for a 2-D and 3-D Pareto front, respectively. Figure 3.4 shows clearly that only points within the near-optimal space (gray) are considered. Illustrating this behavior in three dimensions (and above) is considerably more difficult. The 3-D interior points should be covered by both surfaces, obstructing their view. Figure 3.5 shows that this is the case in three panels. First, a top view of an opaque Pareto front (green) where no interior points can be observed. Second, the same view with a translucent Pareto front, revealing interior points and the near-optimal front (blue). Finally, the view from underneath the near-optimal front once again obscures the interior points, except for two near the edges of the sub-optimal space. The tested points are omitted for clarity.

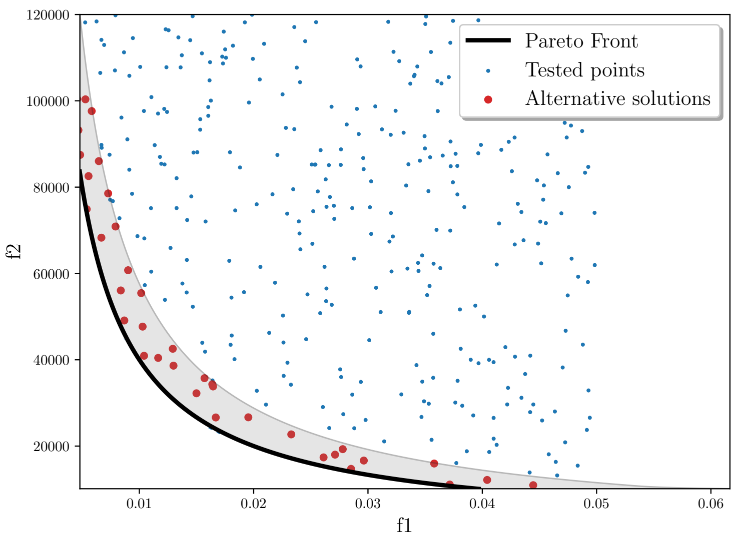

Figure 3.4: All of the alternative points inside the near-feasible space selected using the algorithm described in Section 3.6.

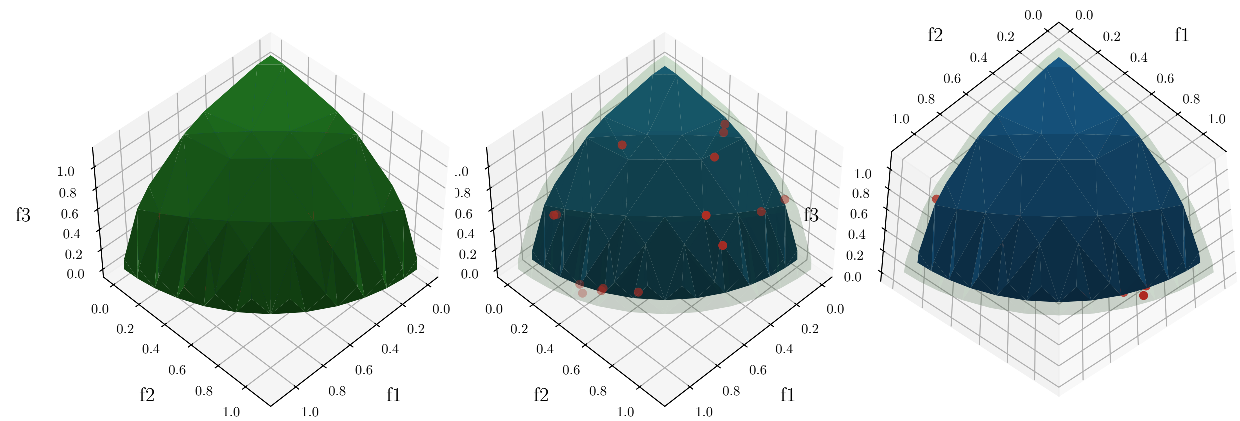

Figure 3.5: From left to right: An opaque Pareto front; a translucent Pareto front showing the interior points above a sub-optimal front; and the sub-optimal front hiding the interior points from a different angle.

3.7 Model Data

So far, this chapter introduced the open-source model I developed, `Osier`, and discussed its motivations and structure. This chapter elaborated on the standard MGA algorithm used to handle structural uncertainty and established a method to extend MGA into higher dimensional spaces. In order to verify `Osier`'s accuracy, I analyze an energy system and compare the results against a representative ESOM, `Temoa`. For this problem, I chose to model the state of Illinois broadly and using weather data from the Champaign-Urbana region due to its geographic centrality. Chapter 4 presents the results from this problem, with a variety of optimization criteria. This section describes the data used in both models. The basic inputs for `Osier` and `Temoa` are

1. Time series data for
    - electricity demand
    - VRE production (e.g., solar or wind),
2. and technology data.

The time series data for electricity demand, wind energy, and solar energy, come from University of Illinois Urbana-Champaign (UIUC). All of the time series are averaged across several years to simulate a "typical" year. I re-scaled the demand data by the total energy demand for Illinois in order for the hourly demand to be on the same scale as the default power units (MW) for `Osier` technologies. However, this normalization choice is somewhat arbitrary. `Osier` automatically normalizes the VRE time series because VRE capacity is a decision variable. Figure 3.6 shows the normalized demand and load duration curves.
Another feature of `Osier` is automatically exporting technology data to a `pandas` dataframe or a LaTeXtable. Table 3.3 summarizes the technology data used in this thesis and was generated by `Osier`.

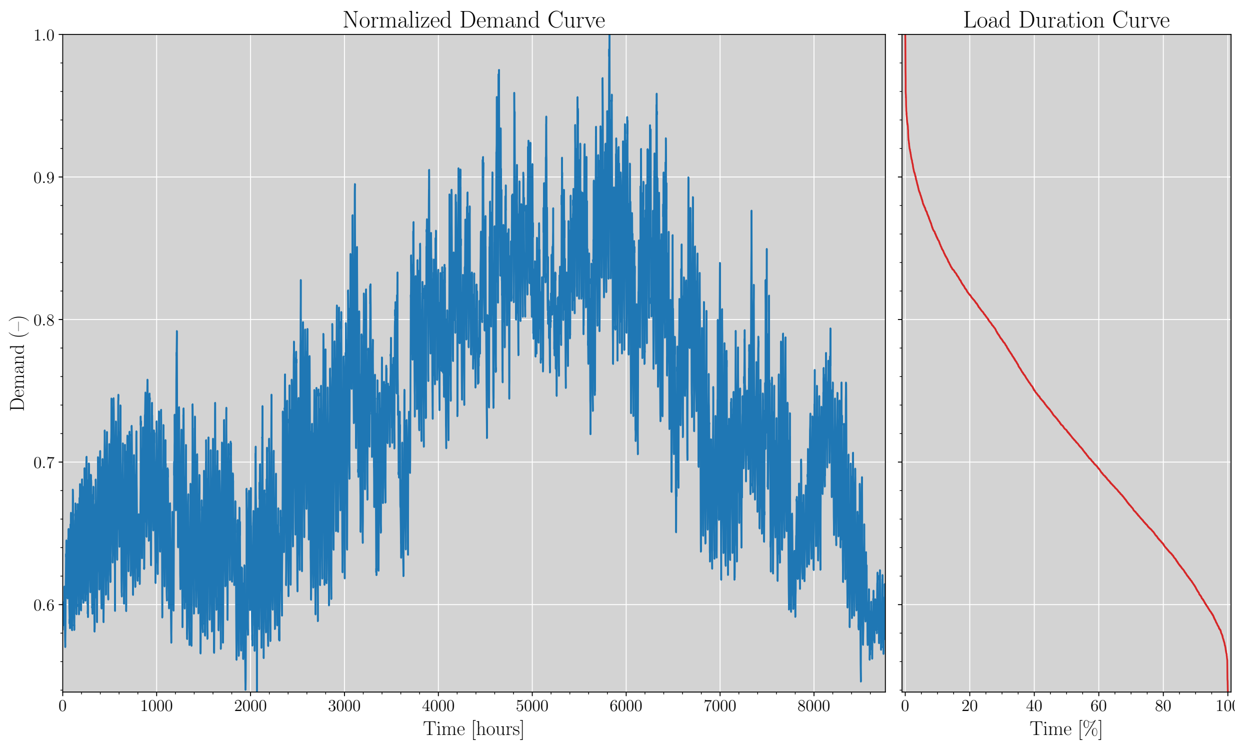

Figure 3.6: The normalized demand and load duration curves that are used in this thesis.

Table 3.3: Summary of Technologies and Parameters available in `Osier`.

technology_name	Battery	Biomass	Coal_Conv	Coal_Adv	NaturalGas_Conv	NaturalGas_Adv	Nuclear	Nuclear_Adv	SolarPanel	WindTurbine
technology_category	base	thermal	thermal	thermal	thermal	thermal	thermal	thermal	base	base
technology_type	storage	production	production	production	production	production	production	production	production	production
dispatchable	True	True	True	True	True	True	True	True	False	False
renewable	False	True	False	False	False	False	False	False	True	True
fuel_type	None	None	None	None	None	None	None	None	solar	wind
lifetime	25	25	25	25	25	25	25	25	25	25
capacity (MW)	815	0	0	0	8.38e+03	0	1.86e+04	0	2.81e+03	0
capacity_factor	1	1	1	1	1	1	1	1	1	1
capacity_credit	0.5	1	1	1	1	1	1	1	0.19	0.35
efficiency	0.85	1	1	1	1	1	1	1	1	1
capital_cost (1/kW)	0.000613	0.00344	0.001	0.00492	0.00096	0.00189	5e-05	0.00492	0.000673	0.00118
om_cost_fixed (1/kW)	1.53e-05	0.000123	4.07e-05	5.82e-05	1.12e-05	2.7e-05	0.000178	0.000119	8.05e-06	3.31e-05
om_cost_variable (1/(MW*hr))	0	0	0	0	0	0	0	0	0	0
fuel_cost (1/(MW*hr))	0	4.7e-05	2.14e-05	3.66e-05	2.24e-05	2.75e-05	5.81e-06	9.16e-06	0	0
co2_rate (megatonnes/(MW*hr))	0	0	0	0	0	0	0	0	0	0
lifecycle_co2_rate (megatonnes/(GW*hr))	2.32e-05	0.00023	0.00082	0.00022	0.00049	4.9e-05	1.2e-05	1.2e-05	4.8e-05	1.1e-05
land_intensity (km/MW**2)	0	0	0	0	0	0	0	0	0	0
storage_duration (hr)	4	nan	nan	nan	nan	nan	nan	nan	nan	nan
initial_storage (MW*hr)	0	nan	nan	nan	nan	nan	nan	nan	nan	nan
land_use (km**2/GW)	0.006	0.006	0.0051	0.0051	0.0032	0.0032	0.0044	0.0044	4.4	12.3
ramp_up_rate (1/hr)	nan	1	0.5	0.5	1	1	0	0.25	nan	nan
ramp_down_rate (1/hr)	nan	1	0.5	0.5	1	1	0	0.25	nan	nan
heat_rate	nan	None	None	None	None	None	None	None	nan	nan

Chapter 4

Benchmark Results

`Osier` is a key tool that will be leveraged in the analysis of subsequent work. Accordingly, it must be shown that `Osier` generates reproducible and reliable, results consistent with the results from an established framework. This chapter has three objectives, the first is to illustrate some of the differences among three evolutionary algorithms: NSGA-II, NSGA-III, and UNSGA-III. Second, it shows that solutions calculated by `Osier` agree with a more established ESOM, `Temoa`. Lastly, it demonstrates some of `Osier`'s advanced features, such as many-objective objective problems and combining MOO with MGA.

4.1 Exercise 0: Deciding Among Evolutionary Algorithms

`Osier` allows users to choose among a variety of MOO methods. This is motivated by the desire for flexibility. However, Exercises 1 and 2 use just one algorithm, UNSGA-III as implemented by `Pymoo`, which should be justified by comparing the results against different algorithms. As an important aside, although I used the `DEAP` implementations of NSGA-II and NSGA-III, these algorithms are not exclusive to `DEAP`. `Pymoo` also implements them, I simply wanted to show the breadth of support for different tools in `Osier`. Figure 4.1 provides the justification for choosing UNSGA-III by comparing the results of three MOO algorithms by showing the respective scatter plots and a density plot of the points on each axis. Since it took UNSGA-III 128 generations to reach its convergence criterion, the other two algorithms were also stopped after 128 generations, before converging. The density plot above the scatter plot shows the density of points along the "total cost" objective. Similarly, the density plot to the right shows the distribution of points for the "emissions" objective.

There are a few notable features of Figure 4.1. First, all three algorithms identified very similar Pareto fronts, the main differences involve the distribution of points and the extent of their respective solution sets. Second, the two `DEAP` algorithms have a greater number of points along the bottom part of the Pareto front, indicating a greater sampling over the cost objective. This is further supported by the higher concentration of points along the lower half of the emission objective's range. Third, the algorithms implemented by `DEAP` both have more extreme values along both axes. All of these features can be attributed to the fact that neither NSGA-II nor NSGA-III fully converged. Thus, choosing UNSGA-III will be used for the remaining exercises for its faster convergence.

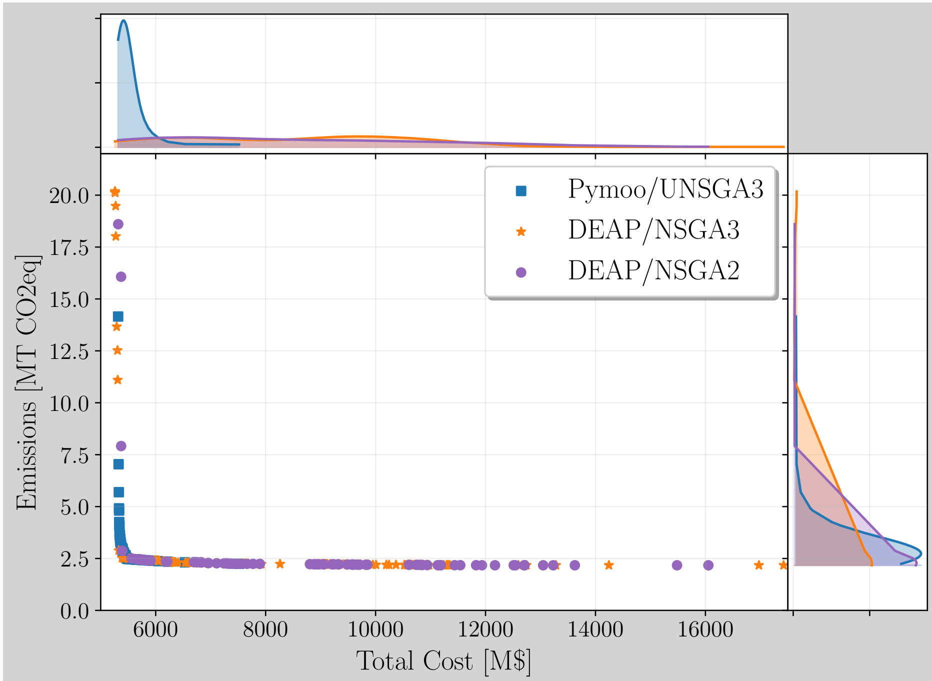

Figure 4.1: Compares the MOO algorithms.

4.2 Exercise 1: Exploring objective space

Since structural uncertainty persists regardless of the number of objectives used, it's important to check the near-optimal objective space for alternative solutions. In the first benchmark exercise, I used `Temoa` to calculate the least-cost solution. Then I generated 30 alternative solutions with MGA as described in Section 3.5.1 with a 10% slack variable added to `Temoa`'s objective function. Figure 4.2 shows the points from `Temoa` in red and `Osier`'s Pareto-front for the same problem in blue. The red- and blue-shaded regions are the sub-optimal spaces (i.e., within 10% of any objective) for `Temoa` and `Osier`, respectively.

First, `Temoa`'s least-cost solution is slightly better (within 0.5%) than `Osier`'s in terms of both cost and emissions. This happens because `Temoa` optimizes energy dispatch slightly differently than `Osier`. In particular, the initial storage value for energy storage technologies is a decision variable in `Temoa` and not in `Osier`. A second reason for this discrepancy has to do with convergence. `Osier`'s Pareto-front could likely be improved with a lower convergence tolerance, but this would use additional computational resources. Although, `Temoa` calculated an optimal solution with slightly lower cost than `Osier`, modelers should not place too much importance on this fact because ESOMs should be used to generate insight rather than answers, due to the nature of the systems being modeled [93].

Next, the sub-optimal spaces mostly overlap, indicating that `Temoa` could find a solution with lower carbon emissions after sufficient iterations. However, none of `Temoa`'s MGA solutions fall within `Osier`'s sub-optimal space. This point highlights the necessity for multi-objective optimization. The objective of MGA is to produce a *diverse subset* of points in the sub-optimal region. MGA may capture appealing alternatives for some unmodeled objective in the original problem, but it cannot guarantee that those solutions will be an improvement along any other objective axis. This is especially apparent here, where the least-cost solution happens also to be the lowest carbon solution, for `Temoa`. The relatively small area where the two ESOMs do not overlap is fully explained by the difference in their least-cost solutions.

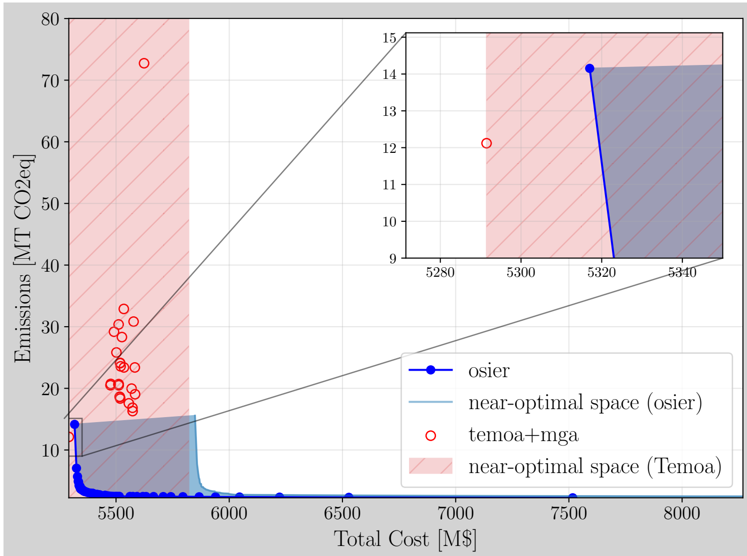

Figure 4.2: Compares the least-cost solutions between `Temoa` and `Osier` as well as their sub-optimal spaces. The least-cost solutions for `Osier` and `Temoa` are within 0.5% of each other.

Even though MOO reduces structural uncertainty, it will always exist, as discussed in Section 2.4.2. Therefore, identifying alternative solutions by sampling points in the inferior region is still useful. Figure 4.3 focuses on the near-optimal space presented in 4.2 and shows both the complete set of near-optimal solutions (green) and some randomly selected points, highlighted in red.

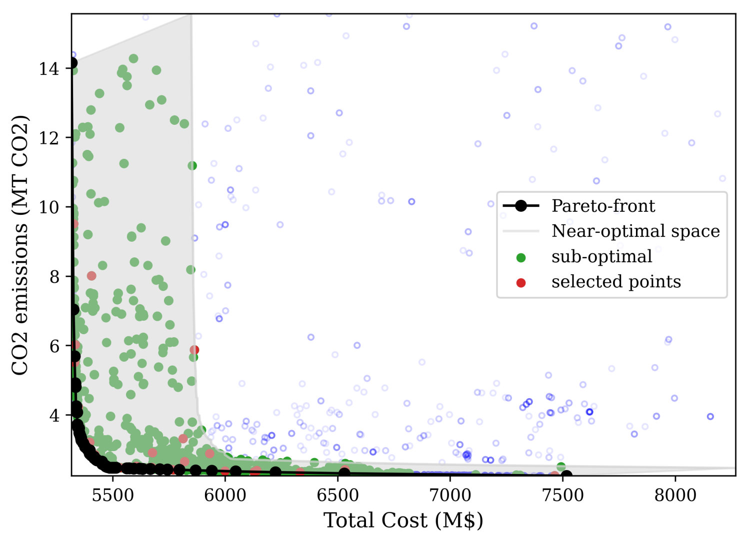

Figure 4.3: Points within `Osier`'s sub-optimal space.

Both Figure 4.2 and Figure 4.3 present solutions in the objective space. However, in order to be prescriptive, the policy solutions must be formulated according to the decision space. In other words, described according to the mix of technologies that produced a solution. Figure 4.4 presents the spread of results in the decision space for each model. Figure 4.4a shows the spread of each technology present in `Osier`'s Pareto front. Figure 4.4b shows the same, but also includes the randomly selected points from `Osier`'s near-optimal space. Lastly,

Figure 4.4c shows the same kind of distribution for `Temoa`'s MGA solutions. Presented in this way, the design space results indicate which technologies are always or usually present. Technologies that are absent in all cases, including the near-optimal solutions, may be safely ignored. For `Osier`, these technologies include both types of coal, biomass, and largely ignores wind energy. In `Temoa`'s results, there are no technologies that are totally absent. This result is due to the imperative built into standard MGA to identify solutions that are maximally different in design space, whereas `Osier` randomly selected points in its inferior region. This suggests one avenue for improving `Osier`.

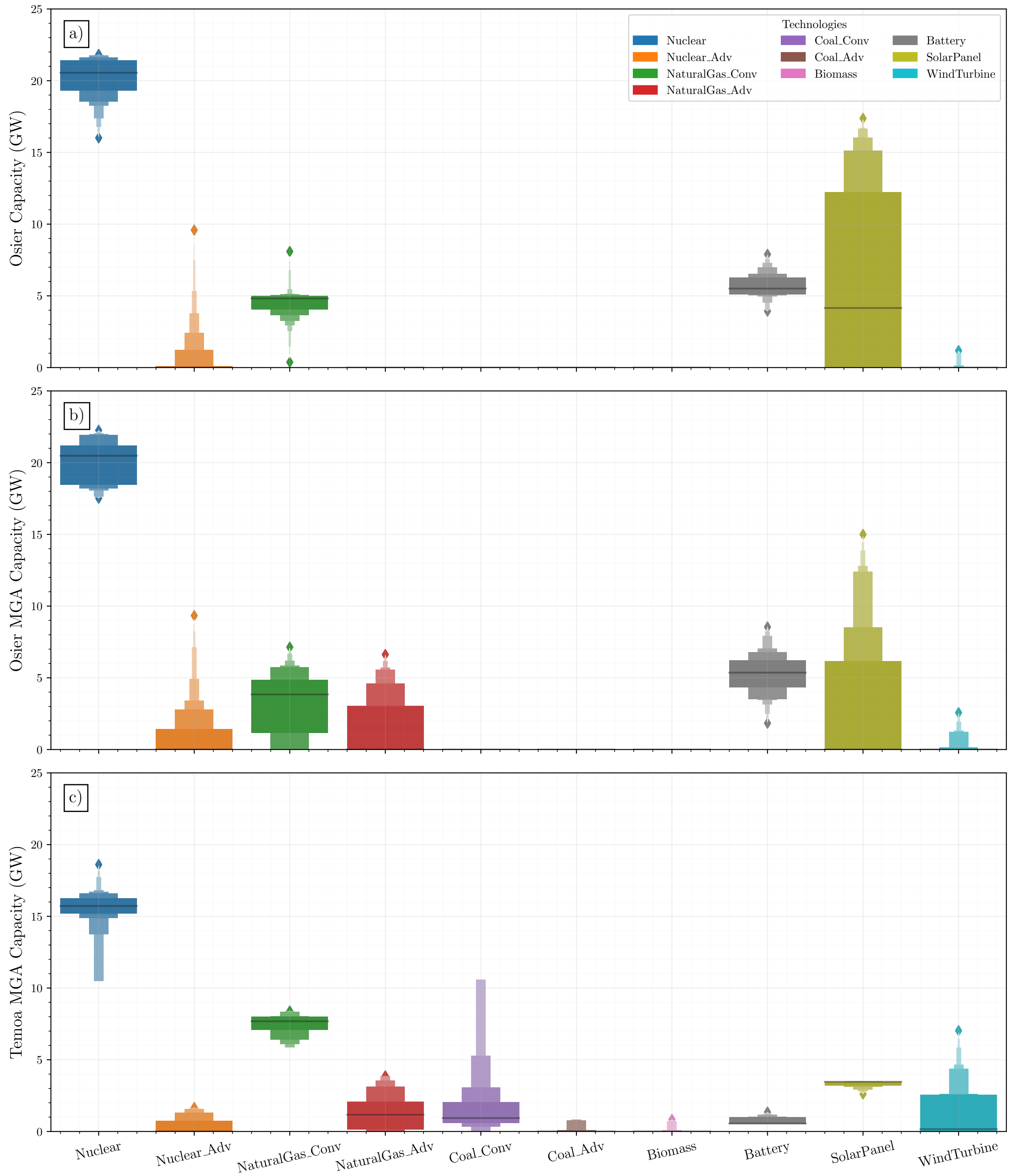

Figure 4.4: The design spaces for a) points on the Pareto-front in Figure 4.2, b) selected points in `Osier`'s sub-optimal space, identified in Figure 4.3, and c) points generated by `Temoa`'s MGA algorithm shown in Figure 4.2.

4.3 Exercise 2: Four Simultaneous Objectives

Chapter 2 showed that conventional ESOMs virtually always model a single objective and that objective is uniformly cost (or a similar aggregated economic indicator). Further, Section 2.5 showed that the existing literature employing MOO never model more than three objectives simultaneously. The purpose of this final exercise is to demonstrate that `Osier` can optimize many objectives, thereby providing more context and confidence for the tool. This exercise minimized four objectives simultaneously: total system cost, lifecycle carbon emissions, land-use change, and percentage of total energy from non-renewable energy sources. Renewable energy sources include solar, wind, and biomass. Although batteries are often used in conjunction with VREs, they are not considered "renewable" (nor are they a true energy "source" since they store energy from other sources rather than producing their own). For clarity, the "percent non-renewable" objective refers to the penetration of non-renewable sources as a percentage of the energy produced rather than as a percentage of the systems total installed capacity. Figure 4.5 shows the objective-space Pareto front for this 4-dimensional problem.

> **Reading Parallel coordinate plots:** Visualizing the Pareto front for this problem presents a challenge due to its high dimensionality. Therefore, I present the results with a novel plot, called a parallel coordinate plot (PCP). This plot is helpful for highlighting differences among a small set of solutions with a potentially large number of dimensions. Figure 4.5 and Figure 4.6 are both PCPs. Although PCPs show continuous lines, they do not show a "trend". That is, for a given solution, each objective takes on a single value that is plotted on its respective vertical axis. The lines connecting these points simply emphasize that these points belong to the same solution. Additionally, each objective axis has its own upper and lower bound because each objective is scaled differently. The MGA solutions presented in Figure 4.7 using a boxplot due to the larger number of solutions included in MGA.

Each of the colored lines in Figure 4.5 belongs to a solution with an 'extreme' value on the Pareto-front. For instance, the blue line labeled "Highest Renewable" has the lowest percentage of non-renewable energy sources of any solution. The gray lines are simply other points along the Pareto-front. Figure 4.5 shows that minimizing land-use change and renewable energy maximization are strongly competing objectives, since the other three extremum are grouped together on those two axes and diametrically opposed to the "highest renewable" solution. Figure 4.6 illustrates the design space for each extreme solution.

Figure 4.6 shows that conventional coal and advanced coal technologies are largely uninteresting because they make up at most 7% and 4% of a solution's peak demand, respectively. The "highest renewable" solution achieves its goal of reaching approximately 100% renewable energy (by percentage of energy produced) with a significant overbuild of wind energy and batteries, with natural gas and a small amount of coal for reliability. Interestingly, this solution uses no solar energy, even though solar and wind are frequently assumed to complement each other.

Figure 4.7 extends the design space results to include the MGA solutions. This plot indicates the design preferences for a middling solution, but hides the relationship among energy technologies. The most popular technologies in Figure 4.7 are conventional nuclear, battery storage, and solar panels. The least popular technologies are wind turbines, biomass, and "advanced" coal plants.

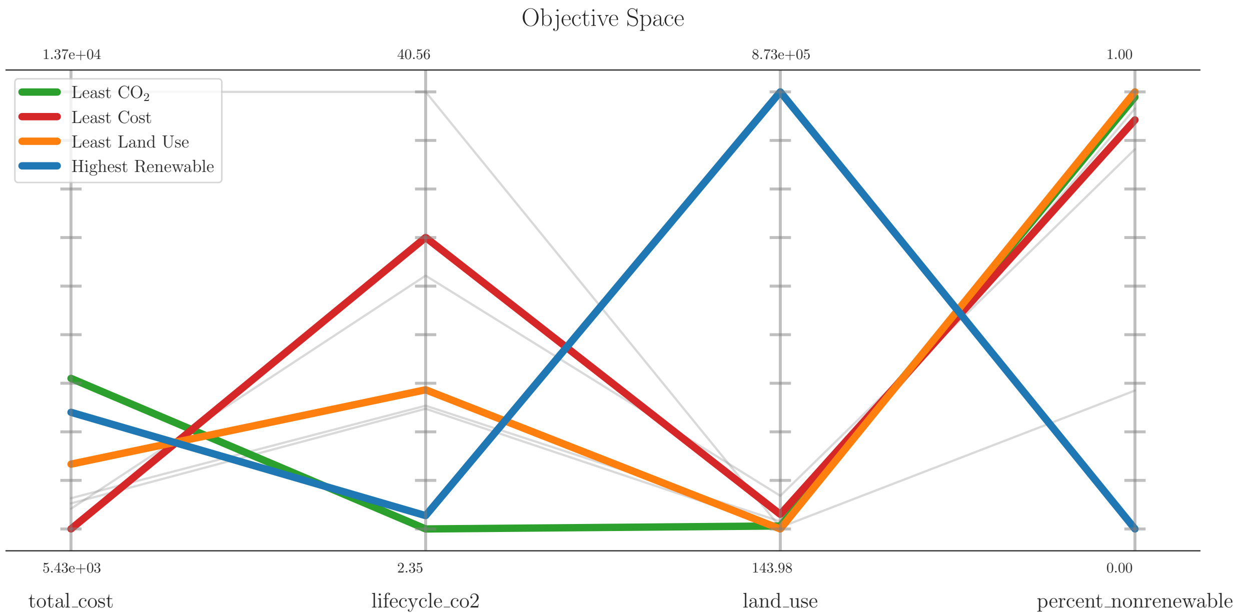

Figure 4.5: The Pareto front for a four objective problem. Extreme values for each objective are colored. The gray lines represent solutions on the Pareto front that are not extremum.

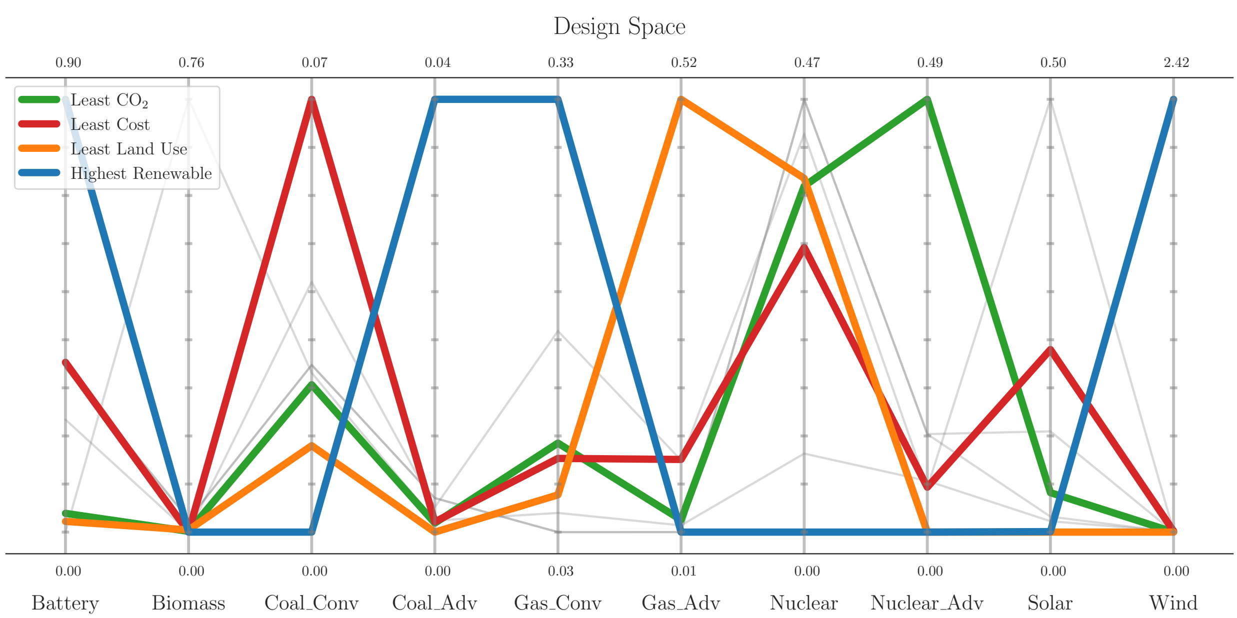

Figure 4.6: The design space for a four objective problem.

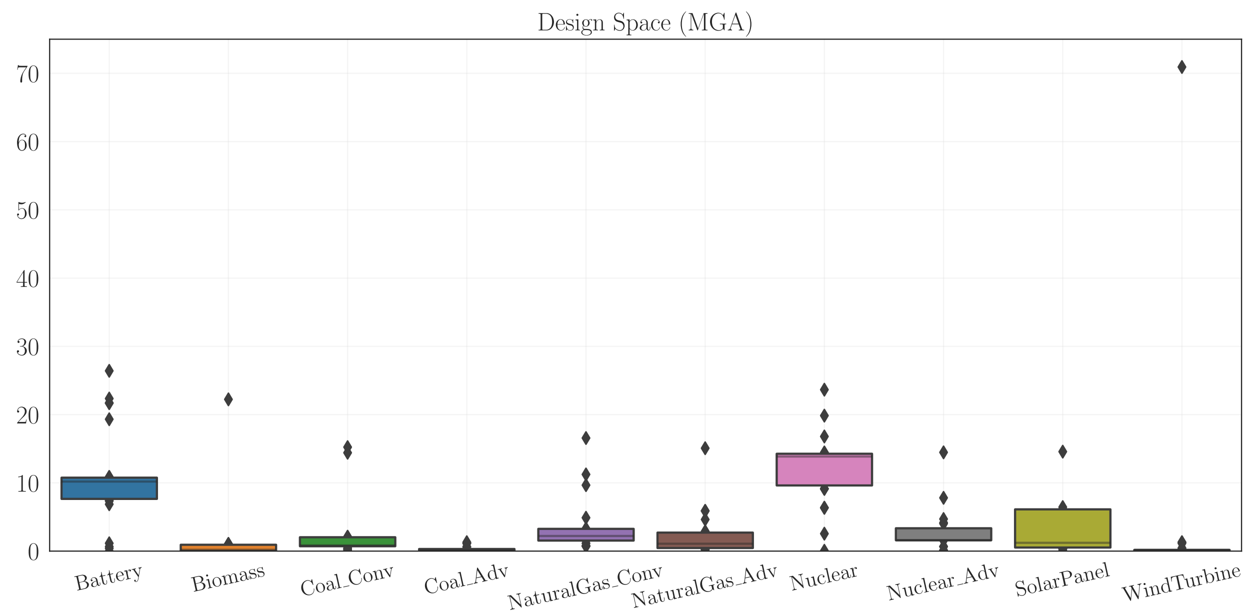

Figure 4.7: The design space for a four objective problem including alternative solutions suggested by MGA.

Chapter 5

Proposed Work

The literature review in Chapter 2 characterized the "wicked" problem of climate change [227], identified the current gaps in ESOM methods, and motivated the need to incorporate ideas from a energy justice and other non-engineering discplines, in order to fully apprehend the challenge. Chapter 3 detailed the development of `Osier`, a novel ESOM framework designed to incorporate conceptions of energy justice. This chapter outlines the future work to deepen the theoretical foundation of this thesis, improve `Osier`'s functionality, and validate `Osier` as a useful framework for enhancing decision-making processes for more just outcomes.

5.1 Expanding the theoretical basis of this work

Chapter 2 introduced the concept of risk — using an modified version of IPCC risk framework: hazard, exposure, vulnerability, and response — explained disproportionality, and discussed various conceptualizations of justice. Specifically, justice understood through Schlosberg's three faceted framework: distribution, procedure, and recognition [228]. Further, I looked to the social science literature on energy systems to develop a stronger definition of energy systems.

5.1.1 How can ESOMs help or hinder fairness in decision-making processes?

Observing the dissonance between the awareness of anthropogenic climate change and policy actions to mitigate the effects of climate change is one of the key motivators for this work. Further, in instances where action is being taken — such as the construction of renewable energy projects following government subsidies, for instance — what drives public opposition? I will elucidate this question by incorporating literature from social movement theory [229], [230] into this thesis. Importantly, the literature shows that not-in-my-backyard (NIMBYism) is not the primary driver of public opposition to energy projects [231], rather, support for these energy projects is more strongly conditioned on genuine public participation in the decision-making process [88], [232]–[235]. For this proposed addition, I will develop a substantive theoretical basis for the argument I advance in this thesis — that a flexible and transparent ESOM is useful for improving procedural outcomes, whereas the current manner in which they are used and their results communicated further alienates the public [236] and delegitimizes energy planning processes

5.1.2 A tale of three uncertainties

Section 2.4.2 identified two uncertainties commonly discussed in the ESOM literature: Parametric and structural uncertainties [93]. Although these two uncertainties correspond to different aspects of energy system modeling (and models writ large), they share the important quality of being descriptive rather than prescriptive. However, even though they are primarily used to describe modeled systems, the results of modeling efforts considering these types of uncertainties are, often implicitly, prescriptive [43], [47], [53], [237]. For example, although structural uncertainty acknowledges the existence of unmodeled (or unmodelable) objectives the nature of mathematical optimization requires modelers to choose at least one objective — one success criterion — to optimize. This choice is always normative because this choice reflects the priorities of the modeler. Further, articles identifying a pathway to "100% renewable energy" make an implicit normative assertion without justification or recognition of the plurality of morally valid alternatives. This suggests the existence of another uncertainty: Normative uncertainty. "Situations where there are different partially morally defensible — but incompatible — options or courses of action, or ones where there is no fully morally defensible option" [238], [239]. There is a connection between structural and normative uncertainties. Figure 5.1 illustrates how these three uncertainties interrelate. Choosing one or several objectives to optimize implies a normative premise — even if the results are presented without a corresponding normative conclusion. The same could be said for any choice in the development of an ESOM: Spatial scale, time scale, which technologies are included in the model, and more. To address normative uncertainty, I will construct an explicit normative premise that undergirds the normative conclusions of this work per the recommendations of van Uffelen et al. 2024 [239]. In essence, defining what "justice" means in the context of this thesis. Further, ESOM modeling struggles with the "human dimension" [14] because unlike parametric and structural uncertainties, there are no "formal" methods for addressing normative uncertainties. Unlike engineering, however, social science is equipped to handle normative uncertainties with formal methods using human subjects, such as case studies, surveys, interviews, and mixed-methods. Articulating the relationships among these three uncertainties will illuminate how energy modellers can model energy systems with geniune consideration for energy justice.

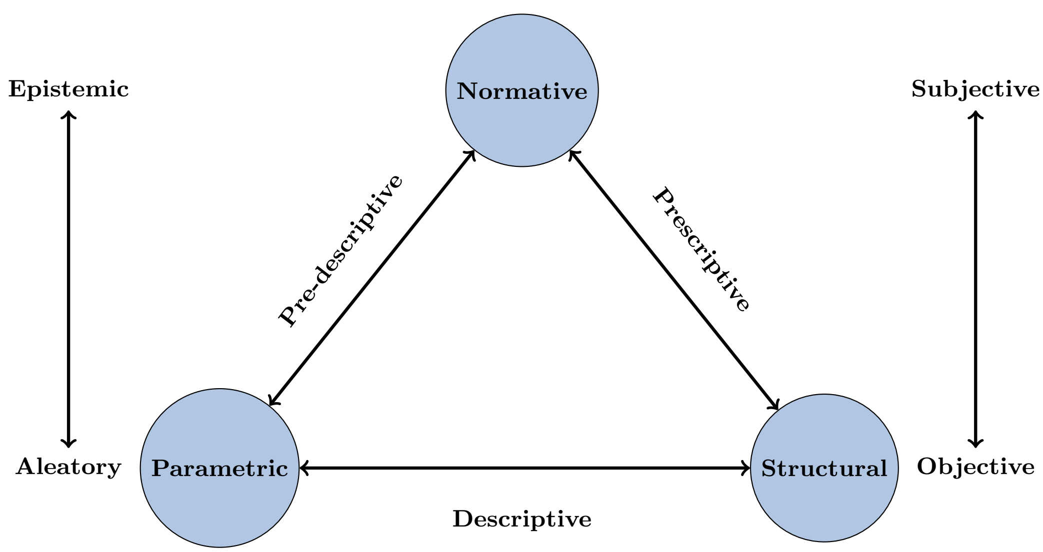

Figure 5.1: Types of uncertainties and how their relationships inform modeling practice.

5.2 Technical improvements to `Osier`

The current version of `Osier` achieved many of its goals for improving the state-of-the-art in energy modeling by enabling the co-optimization of many objectives simultaneously, ensuring that users are not forced to adhere to any specific set of objectives by providing an interface for adding or changing objectives that does not require modifying the source code, and extending the MGA algorithm into many dimensions. However, there are still many ways to improve `Osier`. This section outlines some priority areas for enhancement.

5.2.1 Parallelization

The current code is unacceptably slow for many-objective problems. The four objective model took 26.5 days to run on a computer with 32GB of memory and 6 cores. More work needs to be done on investigating the parallelizability of `CPLEX`, or employing more computing resources. Alternatively, rather than using a MILP model to operate dispatch, using hiearchical model (i.e., a "rules" based model) to dispatch energy could enable multiple processes, and reduce the computational cost of the problem. Additionally, this type of model is conceptually simpler than MILP. The combination of reducing computational cost and theoretical overhead would make `Osier` more accessible, which is consistent with the ethos of this work.

5.2.2 MGA enhancement

The MGA algorithm could yet be improved by developing a selection strategy that more accurately captures the spirit of MGA by identifying *maximally different solutions in the design space* [93], [94]. In this application, discussions generated by presenting maximally different alternatives could alleviate normative uncertainty as described in Section 5.1.2. I will accomplish this by implementing an algorithm from computational geometry that is frequently used in topological data analysis known as greedy permutation, or farthest-first-traversal [240], [241].

5.2.3 Data transparency

Quality data is essential to generating trustworthy results. The Annual Technology Baseline (ATB) produced by National Renewable Energy Laboratory (NREL) is considered the gold standard for cost projections for electricity generating technologies [242]. `Osier` will directly integrate data from the ATB to its built-in technology classes.

5.3 Validating `Osier`

`Osier`'s primary purpose is to translate policy preferences of the public into actionable energy visions for a given municipality. The idea is that if decision-makers used a tool like `Osier` to support their decisions and incorporate ideas from their constituents — ideas that may be distinct from the preconceptions of decision-makers themselves — then stronger actions toward addressing climate change may be taken with more just outcomes. Consider the following. If structural uncertainty is addressed by generating a set of solutions, either by searching the near-optimal space or considering the options along a Pareto Front, how should the ultimate solution be chosen? Answering this last question raises another source of normative uncertainty. Additionally, a result from social choice theory, Arrow's Impossibility theorem, states that one cannot construct a utility function that maps individual preferences onto a global preference order without violating principles of fairness [243]–[245]. Thus, the only way to address normative uncertainty produced by the process of deciding among equally valid alternatives, is to involve the public in a deliberative process [246]. Modelling energy systems with this understanding would allow energy system modelers to advance the causes of recognition and procedural justice, rather than hinder them. The last, and arguably most important, component of this thesis is to validate `Osier`'s usefulness in this regard. I propose validating `Osier`'s usefulness with a case study of the energy visioning processes of three municipalities: Urbana, Champaign, and the UIUC. The research question is then: "Do decision-makers or energy planners perceive that `Osier`, or tools like it, would be useful in enhancing collaboration between decision-makers and their constituents?" Although this case study focuses on a small sample, these paradigmatic cases could be used to generalize the usefulness of `Osier` to other locales [247]. The precise formulation of this research question (or questions) is subject to change between now and the beginning of this study. Since this research involves human participants it must be reviewed by an ethics board.

5.3.1 Reviewing the energy visions for each municipality

I will research the background of each municipality considered by reviewing published documents related to their energy visions, such as UIUC's Illinois Climate Action Plan (iCAP), [248], Utilities Master Plan [249] or the City of Champaign's Comprehensive and Sustainability Plans [250], [251]. I will also compare the stated energy visions for each community with the literature [28]. In addition to energy *visions*, I may evaluate the decision making process for specific energy projects. Such as the microreactor project at UIUC or the recent solar farm being constructed on Market Street in Champaign. How do these projects fit with the stated energy visions for their respective communities? How involved was the public in making these decisions? Who were the stakeholders? This step is important for developing a grounded decision-making process that incorporates `Osier` or a similar decision support tool.

5.3.2 Develop the hypothetical `Osier` procedure

Before interviewing decision-makers and asking if `Osier` would be useful to them I need to formulate a hypothetical decision-making process that includes `Osier`. This is necessary for creating a testable hypothesis about the nature of such a process, which can be tested against interview responses. Additionally, it is important to outline such a method to prevent `Osier`'s misuse. An example of such misuse would be eliminating the iterative component of the process and treating results from `Osier` as an objective truth rather than a basis for deliberation. There are a few ways results (i.e., energy futures along the Pareto-front or in the near-optimal space, as described in Section 3.6) from `Osier` could be used in a decision-making process. The results could be presented in more of a raw, descriptive, form. Similar to the presentation in Chapter 4. Alternatively, whoever organizes the planning process (e.g., city councils, planning departments, etc.) could distill the complete set of results into a manageable subset accompanied by an explanatory narrative. MGA automates part of this option. The former presentation admits less implicit bias from pre-filtering the simulation results, but is arguably less understandable by the public. The latter is more explicit but an explanatory narrative presents more opportunity for politicization. Unfortunately, adequately addressing the best way to communicate results to constituents is out-of-scope for this study because I will not be surveying the public. However, I will present interviewees with both options to create a partial answer from their perspective.

5.3.3 Deciding the interviewees

In order to gauge the `Osier`'s usability, I will interview public facing figures from each municipality involved in the energy or community planning processes for their respective communities. These interviewees should be able to speak to the energy visions of their community and the process by which those visions were created. Their experiences will inform how such processes may be helped or hindered by introducing a modeling tool (or a decision-support tool) such as `Osier` and what ways `Osier` could be modified to serve the goal of greater community participation in planning decisions. Table 5.1 lists potential interviewees.

Table 5.1: Potential interviewees to evaluate the usefulness of `Osier`.

Name	Title	Affiliation
Bruce A. Knight	Planning & Development Director	City of Champaign
Lacey Rains Lowe	Senior Planner for Advanced Planning	City of Champaign
Maddhu Khanna	Director, iSEE	UIUC
Jeremy Guest	Assoc. Director for Research, iSEE	UIUC
Luis Rodiríguez	Assoc. Director for Education & Outreach iSEE	UIUC
Kevin Garcia	Principal Planner	City of Urbana

The list in Table 5.1 merely indicates who might be good participants in this case study. Ideal candidates would have direct experience developing an energy vision for their community and engaging with the public. Additionally, the final list should be demographically diverse, to the extent possible, in order to enhance the generalizability of this case study.

5.3.4 Conducting the Interviews

This section describes some of the questions I may ask during an interview to shed light on how an ESOM like `Osier` could be incorporated into existing or novel energy planning processes.

Questions about current planning processes

The following questions are aimed at interviewees responsible for guiding the planning process in each community. For example, they may be urban planners or in charge of public engagement. These questions are not appropriate for an external party that may be involved in the execution of an specific energy goal but are nonetheless excluded from the initial decision making process.

1. How would you describe your community's energy vision or priorities?
2. How did your community develop these priorities (or this vision)?
3. Does your community have current best practices for making planning decisions?
4. How does your community use modeling software to support its vision, if at all?
5. What are the pain points you experience in developing these visions?
6. What is the role of expert testimony/consultation/input in creating an energy vision?
7. How do you percieve the dialogue between community members and its decision-makers?
8. Does it seem like preferences or concerns from the community are incorporated?

9. Do members of your community understand why a particular decision was reached?
10. How does the energy visioning process in your community consider the impact on its neighbors?
11. Should there be more collective planning among the three communities?

Questions and discussion about modeling tools and `Osier`

The previous set of questions set a foundation for energy planning from the perspective of a decision-maker or planner. This set of questions deals specifically with the usefulness of `Osier`

1. (After presenting results from this model in two ways) Which presentation do you think would best facilitate dialogue between the public and decision-makers?
2. What objectives do you think would be important to model in designing an energy vision for your community?
3. Would your municipality use this tool?
4. If not this specific tool, is there a tool that exists/doesn't exist that is/would be useful?
5. What changes would need to be made to `Osier` for it to be useful to you?
6. How would employing this tool differ from existing visioning strategies or processes?

5.3.5 Generate insights with thematic analysis

The interviews will be recorded and I will use the responses from interviewees to conduct a theoretical thematic analysis [252]–[254]. Thematic analysis is a qualitative method for determining patterns in a data corpus [254].

The general process from Braun & Clark 2006 [255] is to

1. familiarize yourself with the data,
2. develop codes (I will be using an open-coding strategy where codes are developed in the process of reviewing transcripts, rather than being pre-determined [253]),
3. identify themes,
4. review themes
5. define themes,
6. locate exemplars.

5.3.6 Reflection

After developing insights from the interviews, I will reflect on this work and what it means for a holistic analysis of energy systems. Then I will draw conclusions. The conclusions of this study will have descriptive and normative components. The latter will be understood in the context of the normative premise constructed in light of the suggestion in Section 5.1.2.

The results of this analysis could take the form of:

1. “These are the stated energy goals of this municipality.”
2. “This is how `Osier` will change based on feedback from the participants.”
3. “This is how the results from `Osier` would change decision-making procedures.” (Results in this case includes the “optimal” solutions for an energy future *and* the ways the process itself would change.)

5.3.7 Research limitations

The proposed work is an attempt at a more holistic approach to modeling energy systems. However, there remain limitations to what is proposed. Although the intention behind `Osier` is to help translate policy preferences of the public into actionable energy visions for a given municipality, interviewing and surveying members of the public is out-of-scope for this project. Further, determining the needs of a group before developing code in earnest is essential for developing an effective and procedurally just framework. This co-design practice is important for future development of decision-support tools [256], [257].

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