African Mini-Grids Community of Practice

Meeting 4: Report
Abuja, Nigeria
09-11 November 2018
Highlights of the African Mini-Grids Community of Practice (AMG-CoP) in 2018

Key activities of the African Mini-Grids Community of Practice (AMG-CoP) in 2018 include the following:

- The AMG-CoP is growing and now counts 15 member countries: DRC, Kenya, Ghana, Uganda, Zambia, Malawi, Liberia, Namibia, Nigeria, Ethiopia, Tanzania, Zimbabwe, Cote d’Ivoire, Sierra Leone and Cameroon. The new countries are Zimbabwe and Cameroon.
- The third meeting of the AMG-CoP was held in Nairobi in April 2018 on the sidelines of the African Carbon Forum. Bringing together 34 delegates from 14 countries, the meeting focused on the finance-related challenges of implementing mini-grids across Africa. The meeting report can be accessed here.
- A webinar on “Mini-Grids for Rural Electrification and Development: Enabling Effective Business Models through Well-Designed Policies” on 19 September. In this webinar, experts from INENSUS, Engie, RVE.SOL, Helios Infinitas, and AMDA as the industry body, provided an overview of the diverse mini-grids policy, regulatory and legislative environments in Central, Eastern, and Western Africa. The recording is available here.
- An expert facilitated meeting on the topic mentioned above was hosted with the experts to provide an opportunity for the AMG-CoP members to interrogate components of the policies that enable effective business models. This meeting was hosted on 19 September.
- Publication of a revised AMG-CoP concept note, which can be found here.
- The fourth meeting of the AMG-CoP was held in Abuja, Nigeria from 09-11 November. The meeting was hosted by the Nigerian Rural Electrification Agency. The focus of the meeting was on tariff and subsidy design. This three-day meeting was well attended with over 45 participants from 16 countries on Day 1 (open day) 31 participants on Day 2 and 3. The workshop featured the first AMG CoP public-private dialogue among government officials and private mini-grid developers and financiers. The key findings of this meeting are captured in this report.
- A site visit was undertaken as part of the fourth AMG-CoP meeting in Abuja. The members visited a community in Minna where a mini-grid was installed in 2015 by GVE. It is a system of 37.5 kW and powers over 340 households as well as supports 10 productive uses of energy at the moment. More information can be found here.
- Development of the 2019 workplan with input from the members. Based on demand from the members, the Secretariat has scaled up ambition for 2019. The draft workplan for the AMG-CoP is included in this report.
Spotlight on Nigeria-Ghana Bilateral Exchange

The Secretariat has facilitated a bilateral exchange visit between representatives of the Governments of Ghana and Nigeria. The objectives of the exchange visit were:

- To explore the mini-grid policy and regulation of each country.
- To understand the incentive model applied, particularly related to tariff subsidies and the disbursements thereof.
- To determine the operations and maintenance model applied to mini-grids.
- To explore the public private participation of the scaling up of mini-grids in both countries.


This bilateral exchange visit has allowed for a deep engagement between the two countries on public and private sector led models for mini-grid development. A market levy in Ghana that is used to fund electrification projects in the country has inspired officials from Nigeria to look into a similar market mechanism to raise funds for mini-grids. REA are currently working with NERC to determine the viability of such a market levy in Nigeria. Ghana’s electrification strategy is context specific and addresses needs on the ground – for instance in some communities solar home systems are prioritised over mini-grids while in others, mini-grids are used to drive energy access. The Ghanaian counterparts have learnt about the competitive procurement process that REA has piloted in 2018. Productive use of energy is being given more consideration in the private sector led model in Nigeria than in Ghana at present to stimulate demand and grow the local economy to improve the viability of business models.

More information on this exchange visit is contained in this report and can also be found here.
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1. Background and Objectives

Over 600 million people in Africa lack access to electricity. This energy poverty imposes a significant social and economic burden onto communities, affecting their access to education and health services, as well as adversely impacting economic productivity. Mini-grids offer an opportunity to fill this supply gap, bringing electricity to areas underserved or not served at all by the centralized grid. In many places, mini-grids offer the only reliable electrification option. Mini-grids based on renewable energy sources can assist countries to reach their overall development goals, energy-sector objectives and Nationally Determined Contributions (NDCs) under the Paris Climate Agreement. However, despite their tremendous potential, uptake of mini-grids is slow. High investment costs and risks coupled with largely unproven business models has resulted in the slow development of the mini-grid sector in many parts of Africa.

In response to this challenge the African Mini-Grids Community of Practice (AMG-CoP) was convened in June 2017 at the Africa Carbon Forum in Cotonou, Benin to provide a peer-to-peer working group for public sector officials and technocrats committed to scaling up mini-grid policies and systems in their countries. The AMG-CoP is an initiative of the African LEDS Partnership (AfLP) supported by the LEDS GP Energy and Finance Working Groups.

The fourth meeting of the AMG-CoP was held in Abuja, Nigeria. The focus of the meeting was on tariff and subsidy design. The objectives for the meeting were to:

- Explore the viability gap between tariff and subsidy
- Determine how to set tariffs based on the different forms of subsidies available and the timing thereof.
- Create mutual understanding of the approaches taken by each member country with regard to mini-grid implementation.
- Collaboratively develop a workplan for 2019 in a collaborative manner so that it responds to the needs of the members.

2. Key Outcomes and Lessons

The overall feedback was positive, with participants expressing appreciation for the fact that this meeting was held over a longer duration than the last three in-person meetings. The key lessons emerging from the meeting are:

- Despite the firming up or reviewing of the mini-grids/off-grid regulatory framework in many African countries, lengthy processes still continue to deter investments in that particular sector. Licensing processes are complex and lengthy, and in some cases require environmental and social impact assessment studies to be undertaken.
- Uncertainty over the continued validity of Power Purchase Agreements in the event of regime change continues to undermine the confidence of many investors.
• The timing of subsidies is crucial for a viable business model and yet in many instances, the disbursement of the subsidies can take up to three years. This deters developers from venturing into poor communities where electricity is most needed for socio-economic development.
• GIS is increasingly being used to demarcate and prioritise sites for electrification.
• Smart incentives such as duty waivers on imported hardware and material and/or reduced values-added tax are required to boost the mini-grids sector.
• A cross-subsidisation model of customers is required, especially for a standard tariff regime.
• In some instances, government-owned and operated mini-grids are being taken over by the private sector because of poor maintenance or because they are no longer functional.
• Access to finance, especially from local financial institutions, remains a key challenge.
• There is a need to develop the mini-grids sector in a way that does not distort or affect the market in terms of future deployment of renewable energy.

The key outcomes of the meeting hinge on the theme, which was tariff and subsidy design, are:

• There are several tariff regimes, notably, regressive (generally used to grow particular industries), progressive (lifeline), power-based (flat fee structure), standard and flexible.
• Coupling electricity as a service with the provision of appliances (appliance finance), i.e. a fee model, is increasingly being used because of its ability to activate demand and grow consumption. The costs of the appliance and the energy consumed are bundled.
• There is an increasing outlook at communities that have ongoing economic activities to tap into productive use as a way to anchor users. This helps mini-grids in terms of supply, tariffs and cross-subsidisation.
• Site assessments can significantly lower the costs to the developer which ultimately reflects in the tariffs set.

3. Meeting Sessions

In response to one of the needs identified at the third meeting in Nairobi, the meeting in Abuja was longer in duration to allow for deeper discussions. It was a 3-day meeting structured as follows:

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<th>Day</th>
<th>Session Description</th>
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<tr>
<td>Day 1</td>
<td>Open public private dialogue (Friday, 09 Nov)</td>
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<td>Day 2</td>
<td>Closed CoP meeting with CoP members - focus on subsidy design and business model support for mini-grids (Saturday, 10 Nov)</td>
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<td>Day 3</td>
<td>Site Visit (Sunday, 11 Nov)</td>
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The meeting was well attended with over 45 participants from 16 countries on Day 1. There were 12 African countries represented at the meeting. The open day solicited interest from various stakeholders – international and local. The following organisations were represented:

• Africa Sustainability institute (Kenya)
• African Development Bank
• All On (Nigeria)
Day 2 was a closed meeting for only the AMG-CoP members. There were 31 participants from 16 countries. The participant base consisted largely of officials from the Ministries of Energy, and of Rural Electrification.

Day 3, was a site visit to a mini-grid installation in Minna, where participants were offered the opportunity to interrogate the local developer’s representative on the mini-grid system installed. Please see the page here for more information on the site visit.

The following sections capture the key sessions of the meeting and highlight pertinent points.
Day 1: Session on Scene Setting and Case Study Discussion

The following points were made during Micah Melnyk’s (Electric Capital Management) presentation on the case study conducted by the Finance Working Group:

- Tariff and subsidy are the flip sides of the same coin.
- There are two forms of subsidy, either producer or consumer subsidy.
- Governments traditionally approach tariffs from the perspective of affordability and equity.
- There are several tariff regimes, notably, regressive (generally used to grow particular industries), progressive (lifeline), power-based (flat fee structure), standard and flexible.
- Coupling electricity as a service with the provision of appliances (appliance finance), i.e., a fee model, is increasingly being used as this model helps to activate demand and grow consumption. The cost of appliance and the cost of energy consumed are bundled.
- Subsidisation can either happen at the generation, distribution or operation level.
- Connection subsidies tend to favour dense communities. This is often preferred by developers because of the potential returns and also because Results-Based Financing (RBF) requires less documentation.
- A good Internal Rate of Return (IRR) is determined to be between 15-20%. However, this is context-specific and predicated on various prevailing elements.
- Generally developers need bank guarantees to access finance.
- Distribution costs covered by the REA results in a Capital Expenditure (CAPEX) reduction of 40%, which further attracts private sector investment in the mini-grids sector. Nigeria is currently implementing this model in communities whereby REA covers the distribution costs and the developer covers the generation and operation costs. This is largely viewed as a viable form of subsidy. However, a poorly constructed distribution network can have significant negative impact on the developer’s ability to reach the customer with a reliable service.
- As to whether subsidies or concessionary loans work better for developers, it appears that RBF is preferred.

The session was concluded with an open call for members of the AMG-CoP to co-author or contribute to the case study. It was also mentioned that the linkage between tax exemption and subsidies should be further explored as a key topic in the future.

Day 1: Public Private and Philanthropic Voices: Lessons Learnt from Existing Results Based and Incentive Programmes

Tim Reber, from the LEDS GP, facilitated this session and the objective was to draw lessons from programmes on the ground. The key points from this panel discussion include:

- To achieve SDG 7, subsidies are required. For this nascent sector, subsidies play a key role. As business models need to deliver impact whilst yielding financial returns, dense cluster of customers become the primary market. In those dense clusters, productive use of energy generally already exists, or can easily be activated.
• As the market matures, developers will move away from subsidies to more commercial models.
• There are poor communities whereby it is more financially viable to build a mini-grid for productive use whilst households are provided with Solar Home Systems (SHS). This keeps the business model viable.
• There is a significant need to boost CAPEX subsidies on the continent in order to grow the mini-grids sector.
• In order to establish the opportunity for productive use, before a development goes ahead, developers generally go into the target community to assess the status quo and thereafter determine the viable opportunities based on the community’s needs and existing forms of livelihoods etc. Some develop relationships with the communities and nurture entrepreneurship skills. Developers are increasingly providing appliance finance to activate demand for energy.
• A productive use could consume as much power as 100 households in the community. It is therefore important to focus on productive use in order to improve the viability of business models.
• The order of magnitude for productive energy use varies significantly based on the prevailing activities. For instance, cold storage consumes roughly 5 kW to serve 1000 families. To serve the same number of families in an agricultural community whose productive use is milling requires 50-100 kW.

Day 1: Lessons Learnt from Donor Supported Mini-Grid Efforts on Smart Incentives

Session moderator Dr Victor Osu asked several donor representatives to interrogate their findings and reflect on lessons learnt. The following points were mentioned:

• The PowerAfrica programme in Nigeria has commenced in April 2018 and will run for 5 years. The objective of the programme is to realise 10,000 MW new generation capacity through 3 million connections for grid and off-grid sector. The four pillars of the programme are: i) increased private sector involvement; ii) improved off-grid connections; iii) improved enabling environment; and iv) greater energy sector liquidity.
• GIZ Nigeria has provided both technical and financial assistance to the Government of Nigeria. They have supported the establishment an enabling framework, more specifically to REA to develop and implement operational guidelines. They have created a database to determine sites to be prioritised for electrification. GIZ has also supported the private sector to facilitate access to finance. The holistic approach in supporting actors along the value chain has been successful thus far. A close partnership with the private sector has contributed to progressing projects.
• According to GIZ, the NESP programme should have had more of a focus on access to finance, especially relating to local banks. Instead of focusing on electrification modelling, they should have used GIS to focus on data collection and management. The Nigerian Energy Support Program (NESP) should have more of a focus on digital technologies to reduce CAPEX and OPEX.
• The World Bank is currently working on the Energy Sector Management Assistance Programme (ESMAP), which will be launched in the near future in Nigeria. There is room for top-down and bottom-up approach to incentivise mini-grids in Nigeria. The premise of the programme is to build on an existing evidence base or proven concept to attract large investments. The World Bank is working towards improving the ease of doing business in Nigeria.
• The AfDB used to focus on large-scale investments upwards of $10 million, however, there are few established mini-grids companies that can absorb such funds during the time specified. They have now, therefore, created a new facility that lends less than $1 million to Independent Power Producers (IPPs).

This panel discussion was followed by a small group discussion.

Day 2: Reflections and Discussions from Day 1

At the beginning of Day 2, the participants were asked to reflect on the key learnings emerging from Day 1 and to share those within a small group. The following emerged:

• The viability of mini-grids should not be focused entirely on financial returns but should factor in the non-monetary benefits and the socio-economic potential that can be unlocked as a result of energy access.
• It is important to work with local financial institutions to move away from grants.
• Development banks are increasingly getting involved in financing mini-grids, however at a rather slow pace. For instance in Nigeria, well-established developers can get interest rates at approximately 9% while commercial banks offer 15-17%. Even at 9%, it is not attractive enough to stimulate the sector.
• Productive use is key in the business model of a mini-grid.
• Fear around the arrival of the main centralised grid is not a real concern for now amongst the members. There are ways to manage the risk by working with DisCo’s to understand their expansion plan for the next 10 years – this is a way of de-risking investments.
• There are concerns about payment guarantees and government not adhering to PPAs because of the influence of politics and governments.

Day 2: Survey Results

This session was presented by Alexia Kelly from the LEDS GP Finance Working Group and was focused on an investors’ global survey that was undertaken. The key findings of the survey are captured below:

• There are three main challenges that are faced today:
  o the lack of subsidies in concessionary funding;
  o political uncertainty – policies need to match the market. Political stability does not equate to policies that do not change, but rather to flexibility and predictability in the policy framework governing mini-grids; and
  o Investment ready challenge.
• The debt deals going into the market at present are very small.
• As most mini-grid companies are fairly new in the landscape and they are not considered as seasoned entrepreneurs with proven business models, they face many challenges in accessing early stage investment. As investors are driven by high profitability, the bottom line is key and the social impact is considered secondary.
• For developers to become more attractive to debt financiers, they need to cash flow positive. Most developers are operating at less than 50% capacity utilisation of their systems, which impacts their cash flow. Those who are doing relatively well have managed this because they have profitable businesses which they use to secure loans for mini-grid developments.
• Most developers prefer equity.
• Echoing the point from the survey relating to limited deal flows from local financial institutions, a participant from Nigeria mentioned that local banks have commenced capacity-building on due diligence and mini-grid development training.
• There is a decline curve in the cost of mini-grid connection costs while the cost to connect to the main grid has increased.
• It is estimated that grid extension costs between USD 15,000-23,000 per kilometre.

Day 2: Report back from the peer-to-peer exchange visit

The government officials from Ghana and Nigeria undertook an exchange visit, which was facilitated by the AfLP. The objectives of the exchange visit are:

• To explore the mini-grid policy and regulation of each country.
• To understand the incentive model applied, particularly related to tariff subsidies and the disbursements thereof.
• To determine the operations and maintenance model applied to mini-grids.
• To explore the public private participation of the scaling up of mini-grids in both countries.

The first leg of the exchange was the Government of Nigeria visiting their counterparts in Ghana from 28-31 August 2018. Four officials from the Rural Electrification Agency, Energy Commission Nigeria and the Nigeria Electricity Regulatory Commission were involved in the exchange visit. They were hosted in Ghana by a team consisting of officials from the Ministry of Energy and Petroleum, Energy Commission and GEDAP.

The second leg of the exchange was undertaken by five officials from Ghana from 16-19 October. They were officials from the Ministry of Energy and Petroleum, Energy Commission and GEDAP. They were hosted at the Rural Electrification Agency in Nigeria and met with officials from the Rural Electrification Fund, the Nigeria Energy Support Programme (NESP), African Mini-Grids Developer Association (Nigerian chapter) and the Nigeria Electricity Regulatory Commission.

At the meeting, a representative from Ghana and Nigeria who were involved of the exchange visit were each asked to report back. The following points capture the main findings:

• The electrification model adopted in Ghana and Nigeria are significantly different – i.e. a public-led vs a private-led model as well as standard vs flexible and cost-reflective tariff.
• A market levy in Ghana is being used to fund their electrification projects. Nigeria is working with NERC to determine the viability of a market levy to raise funds for energy access project in Nigeria.
• Through a robust and strategic roadmap and plan, Ghana has prioritised mini-grids and solar home systems to drive energy access.
• Split meters mitigate against the risk of theft.
• In-depth peer-to-peer model such as an exchange visit is beneficial to progressing learning on a key topic.
• The Ministry of Energy is at the helm of coordinating many sectors, including transport and power, by collaborating with the relevant ministries. This synergy and coordination has enabled a public-sector led model in Ghana. This level of coordination among ministries is limited in Nigeria, which hampers the creation of an enabling environment.
• The concept of an in-depth peer-to-peer exchange visit was seeded at the last meeting in Nairobi as a result of the stark differences in Ghana and Nigeria’s model for boosting the mini-grids sector.

Day 2: Deep Dive Case Study

This session was facilitated by Micah Melnyk from Electric Capital Management and entailed an exercise focused on tariff setting. Micah presented a fictitious case study and provided figures in terms of population density, economic activities and growth, forms of livelihoods etc. The participants then formed small groups and were asked to roleplay an official at the Rural Electrification Agency who has been tasked with setting up tariffs for a mini-grid development. This exercise was useful in grounding the information presented during the course of the meeting. Through this exercise, the members were asked to think through all the different aspects that need to be factored in determining tariffs.

Day 2: Work Planning Breakout

For the workplan session, to allow every member to be given the opportunity to contribute to the workplan, there were five stations set up in the room with each representing one of the priority areas established at the Nairobi meeting. These are:
• Fostering African leadership
• Building political momentum
• Developing a mini-grid financing ecosystem
• Developing and collating analytical tools and resources
• Implementing pilot projects

There were 15 minutes slots provided after which members were requested to rotate to another station. There was one hour set aside for this exercise after which every station lead reported back to the team. At the end of the day, members were asked to vote on which concept to take forward under each priority. It was made clear that we may not be able to meet expectations because of capacity and budget constraints.

The section below captures the priorities identified in each priority area. The full list of all priorities brought forward by the group can be found in Annex 2.
Developing a mini-grid financing ecosystem

- Deep dive finance workshop(s) with local and international financial players on mini-grid finance.
  - Help local banks and financing institutions better understand the current state of microgrid businesses and identify key interventions and solutions to help unlock local capital across key CoP member countries

- Peer to peer exchange and engagement on mini-grid finance (banks, governments, private sector, MDBs and DFIs).

Fostering African leadership

- Produce spotlights on best practices, champions, showcase champions**
- Peer-to-peer learning and exchange visits**
- Establish centers of excellence or innovation/incubation hubs**

Implementing pilot projects

- Pilot a project on the standardization of mini-grid hardware across all CoP countries to attract developers
  - Feasibility study/survey on the appetite of developers to work with standardized hardware/equipment in AMG-CoP countries
  - Pilot project on standardization of hardware/equipment in AMG-CoP countries

- Documenting success stories on productive use
  - Lessons learnt and success stories on productive use based on economic activities and livelihoods are curated
  - Knowledge product on productive use in African countries
  - Updates on the knowledge product

Developing and collating analytical tools and resources

- Develop Tool Roadmap / Guidebook
  - Develop a sort of roadmap or guidebook that spells out which tools do what, what data goes in and comes out, and which tools to use during different stages of program/project development
  - Secondary goal is to help ensure consistency in tools (and their inputs/outputs) that are being used across all stakeholders (e.g. regulators, developers and financiers might all be using different tools to evaluate project finance – this can lead to confusion)
  - Guiding question: Which metric do you want to look at? → Roadmap points to the available tools that will help you get there.
  - Framework for how tools fit together to paint big picture – i.e. how do all the tools fit together/flow into one another across all aspects of MG’s?
  - Stages/metrics to address: planning, tariffs, subsidies, project finance, M&V, BD, etc.

- Develop Common Framework for Project Data
  - How to ensure consistent data is collected and reported across projects. A lot of different project
reporting tools out there, so can we help standardize some elements?

- Facilitate common analyses of project data across different projects and across CoP countries.
- A lot of work in this space already → link with existing efforts (e.g. GMG Help Desk, Minigrid Partnership, QAF, etc.)

**Building political momentum**

- **Facilitate learning exchange**
  - Politicians and government officials that are not directly involved in the planning and implementation of mini-grids to visit electrification project in other countries to highlight the potential of mini-grids.

- **Create a mini-grid ecosystem**
  - Map what is going on in the mini-grids landscape including results, economics, impacts and policies to allow member countries to “catch up” with countries that have achieved far more progress. This would provide the evidence base so required to further mini-grids in many member countries.

- **Develop a mini-grid policy framework or model framework**
  - This would provide a base for legislation in member countries.

To the best of our ability and using the resources available, the Secretariat and the Working Groups have accommodated the priorities identified above. Some of them have been included in our workplan, which can be found in the next section.
4. Draft Workplan for Jan-June 2019

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<th>Activity</th>
<th>Jan</th>
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<td>Local financial institution mini-grid training - contingent on resources</td>
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<td>Host one in-person meeting in Q2 of 2019. The theme of the meeting is TBD - contingent on resources</td>
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<td>Develop knowledge product on productive use and demand stimulation</td>
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<td>Conduct community mini-grid ownership pilot effort, including a study tour to the Philippines and USA on the modus operandi of energy co-ops — contingent on resources</td>
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<td>Provide the opportunity for champion members to attend the World Bank Mini-Grid Action Learning Lab in March 2019, country TBD — contingent on resources</td>
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<td>Host events at larger meetings/gatherings to raise the profile of the AMG-CoP - contingent on resources</td>
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<td>Maintain WhatsApp and LinkedIn Groups.</td>
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<td>Actively reach out to countries currently not included in the CoP.</td>
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<td>Mapping experts/ mini-grid leaders.</td>
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<td>Building resource library.</td>
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<td>Setting up an exchange visit between Nigeria and Ethiopia.</td>
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<td>Setting up an exchange visit and/ or study-tour (several have already been identified to date) - contingent on resources</td>
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<td>AMG-CoP Declaration to communicate high-level political message.</td>
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<td>Access REAL funds to deliver Technical Assistance by the countries who have requested it.</td>
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<td>Virtual meeting on a topic to be determined.</td>
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<td>Webinar/virtual meeting with AMG CoP members focusing on demand management (productive use).</td>
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<td>Knowledge management on the information emerging from the CoP.</td>
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<td>Responding to needs through Peer-to-peer exchanges, local regional expertise and REAL.</td>
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<td>Develop roadmap and guide for mini-grid tools and applications.</td>
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<td>New entrant crash course on mini-grids - Ethiopia, Namibia, Uganda, Malawi, Zimbabwe - contingent on resources</td>
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<td>Development support for one fundraising proposal for deeper engagement with early mover countries and CoP support.</td>
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<td>Case Study/Knowledge Product on topic to be determined.</td>
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<td>Webinar on anticipating the arrival of the grid.</td>
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<td>Webinar on grid-connected mini-grids and the associated business model.</td>
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<td>Webinar with AMDA on their services and role in the sector.</td>
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5. Annexes

Annex 1 – AMG-CoP Programme
Annex 2 – Priority Areas – ideas put forward
Annex 3 – Detailed Meeting Notes
Annex 4 – Meeting Participants