Table of Contents

1. Foreword .................................................................................................................................3
2. About this report ......................................................................................................................5
3. Highlights from 2015/16 .........................................................................................................5
   a) Second AGM, Amsterdam, 14 – 16 June ...........................................................................5
   b) Key GOGLA publications ..................................................................................................6
   c) 4th International Off-Grid Lighting Conference and Exhibition ....................................6
   d) Power for All campaign ....................................................................................................8
4. Progress against strategic priorities ......................................................................................9
   a) Market data collection .......................................................................................................9
   b) Quality Assurance ...........................................................................................................10
   c) Duties and VAT elimination ...............................................................................................10
   d) GOGLA as voice of industry .............................................................................................11
5. Progress across our working groups .....................................................................................12
   a) Business Models and Market Intelligence .......................................................................12
   b) Policy ................................................................................................................................13
   c) Quality Assurance ...........................................................................................................13
   d) Sustainable Value Chains .................................................................................................13
   e) Social Impact .......................................................................................................................13
6. Update on other areas of work ..............................................................................................14
   a) Engaging the humanitarian sector ....................................................................................14
   b) Engaging distributors ........................................................................................................14
   c) Expanding our focus to India ............................................................................................15
   d) Strategy review ................................................................................................................15
7. Membership update ...............................................................................................................15
8. Employee update ....................................................................................................................16
9. Financial management and fundraising ..............................................................................17
   a) Financial Management ......................................................................................................17
   b) Funding ..............................................................................................................................18
10. Progress against KPIs ..........................................................................................................19
11. Looking ahead ......................................................................................................................20
1. Foreword
With just over three years of operations behind us, 2015/16 marks a landmark year for GOGLA. Having continued to expand and raise our profile, we are now better placed than ever to support one of the most impactful sectors in the global economy today.

In May 2015, we were proud to be part of the official launch of the Power for All campaign at the SE4All Forum in New York. In June, our AGM in Amsterdam gave us a good opportunity to focus and reflect, with our members, on the activities of the previous twelve months, and to discuss our strategic direction for the next three years. During the meetings, our members also adopted a number of important industry opinions allowing us to speak as one voice and move forward in a determined and united manner, showing confidence across a range of issues most critical for sustainable sector development.

The summer saw our team gear up for the 4th International Off-Grid Lighting Conference and Exhibition in Dubai in October; the first event of its kind in three years and the first time GOGLA led on the organization. The event was attended by over 500 participants, representing almost 50 countries, as well as a diverse range of roles from across the sector. Across the four days, consensus emerged that, while we’re still young as an industry, we are maturing. Technology is progressing fast, enabling new and more profitable business models, and contributing to a sharp rise in both investment and sales globally.

2016 started with a number of game-changing publications that have significantly raised the profile of off-grid-lighting among governments, investors and the media. GOGLA contributed to PowerAfrica Beyond the Grid in Washington DC, and to the FMO/SolarPlaza event Making Solar Bankable in Amsterdam. In cooperation with Alliance for Rural Electrification, we also hosted a successful second National Renewable Energy Associations Workshop in Nairobi.

In March, the long-awaited Bloomberg New Energy Finance (BNEF) Off-Grid Solar Market Trends report gave the most comprehensive insight yet into the sector’s potential, citing that 89 million people across Africa and Asia are now living with improved energy access thanks to off-grid solar products; and off-grid lighting investment increased 15-fold between 2012 and 2015 (standing at $276 million for 2015). And most notably, in autumn 2015, in just one week in autumn 2015, five GOGLA members announced newly raised investments at a combined total of $59 million.

So, as an industry, we’ve achieved a huge amount in three years. But we still have much to do if we’re to reach the 2030 target of every household in the world having access to basic energy.

Onwards and upwards...
2. About this report

This report covers the period spring 2015 to spring 2016, from the AGM in June last year to May 2016. Although many of the activities discussed are structured along our five working groups (summarized in section 5), for 2015 we focused on the following priority areas:

- Market data collection (including impact)
- Quality assurance
- Duties and VAT Elimination
- Strengthening GOGLA as voice of industry

These reflect our strategy for 2015-2018 (presented to members last year) and we track our progress across these priorities in Section 4. Additionally, we report progress on working groups, membership, staffing, and finances, as well as progress against our key performance indicators (KPIs).

3. Highlights from 2015/16

a) Second AGM, Amsterdam, 14 – 16 June

- GOGLA working groups helped facilitate the adoption of a range of key industry positions. The policy handbook is available at www.gogla.org/resources.
- Presentation of a publication on standardized impact metrics for the off-grid energy sector, put together by GOGLA’s social impact working group to consolidate a harmonized industry standard for reporting on social impact. The vision of these metrics is to accurately describe impacts in a comparable manner with a view to attract investment, working capital, and regulatory support for the off-grid lighting industry. The metrics are available at www.gogla.org/resources.
- Update and overview of the year from GOGLA Executive Director, Koen Peters, including member sales data collection. This showed promising results to date, paving the way for a concerted drive to improve the scale of collection and a consolidation of the methodology.
- Campaign Director for Power for All (of which GOGLA is a founding partner), Kristina Skierka, gave an impassioned introduction to the campaign that seeks to unite all relevant actors to advance renewable, decentralized electrification solutions as the most rapid, cost-effective and sustainable approach to universal energy access.
- GOGLA members engaged in a discussion, moderated by Koen Peters, on the future of a quality assurance framework.
- A new Advisory Board (brought in to reinforce GOGLA’s governance structure) was introduced to AGM attendees. It will support GOGLA by providing an external view on challenges and opportunities.
- As with all GOGLA events, the AGM provided an opportunity for attendees to network with peers and fellow members.
b) Key GOGLA publications

- **Delivering Universal Energy Access - The Industry Position on Building Off-Grid Lighting and Household Electrification markets.** Released in October, 2015, the positions outlined in this policy handbook represent the collective decisions of over 65 GOGLA members. The handbook deals with a number of challenges, including how to define and track energy access, how public and donor funding should be used, why quality assurance of our products is so important and why kerosene subsidies are harming the market. It is available at: www.gogla.org/resources

- **Accelerating Electricity in Africa with Off-Grid Solar.** Released in January 2016, jointly prepared by ourselves, the Overseas Development Institute (ODI), Practical Action and SolarAid, the report presents evidence of the potential of solar household systems, and reviews the market across 13 selected sub-Saharan African countries. It is available at: www.gogla.org/resources

- **Social Impact Metrics Framework.** In the absence of a previous sectoral standard for calculating impact, we launched this paper in June 2015 with the objective of attracting investment, working capital, and regulatory support for sector. It is available at: www.gogla.org/resources

- **2016 Off-Grid Solar Market Trends Report.** Released in March 2016, GOGLA worked with the World Bank (WB) and BNEF to help launch the 2016 Off-Grid Solar Market Trends report. The third in a series, this report tracks the ground-breaking technological advances and disruptive business models that are transforming the lives of millions. It is available at: www.gogla.org/resources

- **Global Off-Grid Solar Semi-Annual Market Report** (Public Report) and the **GOGLA Social Impact Report.** GOGLA will shortly be launching the public sales data report and, for the first time, a Social Impact Report. Both reports will be available on the GOGLA website.

c) **4th International Off-Grid Lighting Conference and Exhibition**

Considered to be the global event for our sector, the IOGLC was held in Dubai at the end of October 2015. For the first time, we led the organization of the full program, raising our profile within Asian, African and other markets.

Co-hosted by ourselves and the World Bank Group’s Lighting Global initiative, the event brought together more than 500 conference participants across 23 different sessions, including policy-makers, investors, bilateral and multilateral donors, manufacturers, distributors, retailers, international organizations, end-user groups and academics, among others. Nobel Laureate Professor Muhammad Yunus delivered the opening keynote address via video, highlighting the role of social business models in delivering energy access at scale, before GOGLA President Harry Verhaar welcomed high-level panelists for the opening session, including government Minister Grant Shapps from the UK.
The conference incorporated an additional day of side events individually organized by conference participants. A parallel trade exhibition assembled over 40 exhibitors, expertly placed to present their products and organizational plans to delegates.

This event has become the galvanizing focus to chart the business-driven route to improved energy access for those lacking access to reliable, grid-based electricity. Key messages during the conference included:

- Our sector is projected to light up close to **100 million homes by 2020**.
- To date, the industry has **helped customers save around USD 3 billion** in outgoings such as kerosene and batteries, according to World Bank Group and GOGLA-collected data (presented, in part, at the event).
- This was the first year the event was held outside of Africa, signaling that the **industry is maturing**. As well as technological advances that catalyze new and more profitable business models, governments and investors are starting to recognize the value that off-grid solutions can deliver.
- **Energy access is a bigger policy priority**. Building on the work of Sustainable Energy for All and other energy access pioneers, the adoption of universal energy access is providing an important push for public sector interest in the sector, with a particular focus on SDG 7. The concept and measurement of energy access has also recently gained significant interest from governments and development agencies.  

- Scale and sustainability requires an **ecosystem approach**, in other words the sector needs to develop its capacities and work with a range of stakeholders to provide access to finance, market intelligence, quality assurance, enabling policy environments, adequate sector representation and knowledge exchange etc.

The event was organized under the patronage of H.E. Sheikha Lubna Al Qasimi, Minister for International Cooperation and Development of the United Arab Emirates, and was sponsored by Total,

---

1 Sustainable Development Goal (SDG) number 7 aims for ‘universal access to affordable, reliable and sustainable modern energy by 2030’. As part of the UN’s SE4ALL Program, The Global Tracking Framework was introduced to cover five tiers. This more nuanced framework, starting with Tier 1 as the most basic energy access of task lighting and phone charging, progressing up to Tier 5 which describes general home lighting system, television and fan, plus any other high power appliance, resolves a previous short fall in energy access categorization.
the OPEC Fund for International Development, Philips, Greenlight Planet, SolarWay, Omnivoltaic, PowerAfrica, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the Italian Ministry for the Environment, Land and Sea.

As a thank you to all speakers and panelists, we made a donation to the Solar lighting program of the International Organization for Migration, helping it distribute 804 LG quality assured lanterns among displaced Rohingya people in Bangladesh. While GOGLA generally advocates market based solutions as the most sustainable approach to universal energy access, it is clear that certain groups still rely on emergency relief, and we will support any relief initiatives where we can.

For conference quotes and interview footage, visit GOGLA’s YouTube channel. For the full Conference Report, go to www.gogla.org/resources.

d) Power for All campaign
The Power for All campaign (of which GOGLA is a founding partner) serves as a collective voice for businesses and civil society, focused on beyond-the-grid renewable solutions. It aims to drive the policy, regulatory and financial environment needed for the sector to scale at speed, focusing on global advocacy, awareness, and market activation.

The campaign secured around GBP 1 million (around USD 1.45 million) from the UK Department for International Development (DFID) in October 2015. This is channeled via Practical Action, one of the founding partners of the campaign, and delivered by a professional leadership team. GOGLA provides two of the team members and has been chairing the Steering Committee that oversees the Power for All campaign. Over the past six months, several new partners from across the decentralized renewables sector have joined the campaign, helping to:

- make three Calls to Action, including a high profile focus at the WB Spring Meetings where the team hosted a CSO event and held meetings with WB staff. The call for development banks to integrate an energy access opportunity cost into funding decisions was particularly well received;
- launch national campaigns in Sierra Leone and Zimbabwe, and stakeholder workshops in Nigeria and Rwanda, with activities in each country to support the sector. For example, the campaign has helped the Sierra Leone Energy Revolution initiative push through a signed Energy Africa Compact, set ambitious targets for off-grid electrification, and eliminate import duties and VAT on qualified solar products;
- establish PEAK (the Platform for Energy Access Knowledge), a research partnership between Power for All and the University of California Berkeley’s Renewable and Appropriate Energy Laboratory (RAEL) to translate data on decentralized renewables into key proof points; and
- create a variety of media, content and compelling stories for target audiences, including policymakers, investors, and national, international and energy sector press.
4. Progress against strategic priorities

a) Market data collection

Market data collection was a key priority for GOGLA in 2015/16. Our work in this area included:

- **Sales Data Collection.** We contracted Dutch-based Berenschot Consultancy as an independent third party to collect the sales data of GOGLA members, and to protect sensitive company information. Data was only shared with GOGLA staff or the public when more than three data points were available. The data collected in the first round was successfully combined with International Finance Corporation (IFC) data sheets and subsequently aggregated, analyzed and presented to members at our AGM.

Since not all GOGLA members submitted their data and due to the three data point rule, sales could not be published for all product categories and for all countries. We have been improving the questionnaire for each new round, and are now using an online questionnaire, further professionalizing the data collection process.

In Q3 2015, and in close collaboration with the IFC Lighting Global team, we conducted the second round of data collection (covering January – June 2015). Following a flattening of sales growth rates in the first half of 2015, for the first time there was a downward trend in sales numbers. The second half of 2015, however, showed strong growth for the sector again. Now in the third round, the data is being collected via an online form. With 31 companies participating, the response rate continues to improve.

- **Co-commission trends report with IFC / International Bank for Reconstruction and Development (IBRD).** In early 2015, BNEF was contracted by WB Lighting Global to carry out the research and develop the report. GOGLA was engaged in the drafting of the terms of reference, as well as facilitating contact with companies, providing sales and investment data, and background information. The initial results were previewed at the 4th International Off-Grid Lighting Conference in October, with the report itself being launched in March 2016. The full report can be downloaded at: www.gogla.org/resources.

- **Tracking investment data.** Having previously only tracked publically-announced investments to gain a broad insight into sector growth, this year we recruited a consultant to survey GOGLA members on investment data. Nine of our members participated and shared their investment data from the last 5-7 years. This was then combined with the research results of BNEF, leading to a relatively complete picture, as a baseline, of investment trends in recent years.

- **Collecting Impact Data.** This year the GOGLA working group finalized the first six metrics to comparably measure the social impact of members. The social impact group launched the impact metrics framework at our AGM, enabling members and partners to begin reporting their impact with standardized metrics. The report was well-received, with many signing up for a ‘test
run’ over the summer. Based on feedback, the metrics were tweaked before data was collected from all GOGLA members, together with the half-yearly sales data collection exercise.

To increase uptake of the metrics by other organizations, GOGLA partnered with IRIS at the Global Impact Investment Network. This helped to improve the efficiency, credibility and consistency of standardized metrics. At the start of 2016, we started to collect impact data from our members in combination with the sales data collection exercise (outlined above). The working group is now starting to develop metrics to capture the impact of Solar Home Systems and solar kits.

b) Quality Assurance
Quality assurance continued to gain importance as a key aspect for future sector development. A central aspect in GOGLA’s activities on this area is the process of transferring the current Lighting Global Quality Assurance program to a new structure, out of the World Bank. Earlier, GOGLA worked with a consultant team contracted by Lighting Global (Navigant) to prepare a study on a possible future set-up, by providing industry feedback. During our AGM, we hosted a workshop on the topic. Subsequently, under the umbrella of the GOGLA working group on Technology a small group of GOGLA members and staff was formed to draft a proposal on possible GOGLA roles and subsequently submitted an Expression of Interest to IFC for this future role. Subsequently, Lighting Global chose to elaborate proposals with two possible future operators of the certification scheme, CLASP and Research Triangle Institute. GOGLA has been communicating closely with both actors to determine possible GOGLA roles in their proposals.

Furthermore, GOGLA has been exploring possible ways to address intellectual property right infringements in the industry. Through the support of an individual consultant (Matthias Galan) GOGLA obtained an overview of support organizations in the industry, and consequently joined REACT, an association to fight counterfeit trading. GOGLA also started discussions with legal advisers to provide guidance to its members on how to better protect their brand names and other intellectual property.

c) Duties and VAT elimination
We have been advocating for solar lighting and electrification products to become part of the environmental goods agreement (currently negotiated in the framework of the World Trade Organization). Reaching out to governments, we are calling for certain goods to be exempted from tariffs in all signatory countries.

Following our AGM, the industry opinion on VAT and tariff exemptions (developed by the working group on this topic) was passed and adopted with a clear majority. It has since been included as part of our policy handbook, Delivering Universal Energy Access, published in October. We were also asked by DFID (as part of its new Energy Africa campaign) to lead the work on drafting a policy compact in cooperation with SolarAid, the Overseas Development Institute, and Practical Action. Already signed by a number of countries, the Compact includes a call to remove all fiscal barriers, including VAT and import tariffs. We’ve seen particular progress in Sierra Leone where tax exemptions for solar products will soon come into force.
GOGLA continues to fundraise to commission a study into the impacts of VAT and import duties on solar lighting markets. Interest in the study was shown by GIZ and DFID in Mozambique, and we are aiming to add more countries to our analysis.

d)  GOGLA as voice of industry
Effective communication is critical to enable us to speak accurately and decisively on behalf of our members. Strengthening this was a priority for us in 2015/16, as we hosted or organized the following events:

- **GOGLA AGM** – Amsterdam, June 2015 (see section 3).
- **4th International Off-Grid Lighting Conference and Exhibition** – Dubai, Oct 2015 (see section 3).
- **Last Mile Distribution Business Models for Solar Lighting** – February 2016. In cooperation with the BoP Innovation Centre and Frontier Innovations, over 200 delegates attended our webinar on marketing, training and retaining agents, and developing the right product offering (see the GOGLA YouTube channel).
- **National Renewable Energy Associations Meeting** – Nairobi, February 2016. Following a successful workshop in Dubai (supported by OFID and GIZ) to raise awareness around sector development, we hosted a 1.5 day roundtable event with National Renewable Energy Associations from over 10 countries including Malawi, Zimbabwe and Bangladesh, alongside the Alliance for Rural Electrification. The aim was to strengthen the network of associations, and exchange ideas, experiences and shared challenges. Topics included governance, sustainable financing, member engagement, communications, messaging and joint advocacy, as well as robust regulation for QA. There was a clear need expressed by the associations to continue the exchange of information and knowledge, and GOGLA is seen as the logical facilitator at a global level. Therefore, we will continue our involvement and secure additional funding to enable this going forward.

In addition to the events above, GOGLA colleagues also spoke at a number of events around the world including:

- **SE4All Forum** – New York, May 2015. We ran a session on off-grid lighting and energy access, developed in cooperation with partners.
- **Energy Efficient Appliances Event** (organized by CLASP and Global LEAP) – Bangladesh, July 2015. Hans Peter Birkhofer participated in a panel session.
- **Off-Grid Experts Workshop** – Germany, September 2015. Hans Peter Birkhofer spoke.
- **ARE investor summit** – Amsterdam, April 2015. Koen Peters participated in a panel discussion.
• Solar Off-Grid and Renewables West Africa – Accra, April 2016. Johanna Diecker presented.

5. Progress across our working groups

a) Business Models and Market Intelligence
Now known as Business Development, this working group focused on working with consultants and partners (including BNEF and Lighting Global) on market data collection (see section 4) and mobilizing investment. 2015/16 highlights include:

• establishing half-yearly sales data collection;
• collecting investment data (with a third-party consultant) throughout summer 2015;
• moving to an online data collection system (no longer relying on excel spreadsheets); and
• publishing more regular reports on sales data, and a new regular social impact report.

A sub-group is currently working on guidance and harmonized language on Pay-As-You-Go (PAYGO) businesses in the off-grid electrification space, in close cooperation with the IFC, the UN Capital Development Fund (UNCDF), and Village Power. UNCDF is also helping fund the services of consultant Eduardo Appleyard, who will support our activities until end of August 2016.

As part of this working group, GOGLA has also been working with PAYGO Distributed Energy Service Companies (DESCOs) and partner organizations to:

• Facilitate a consultative process to develop a harmonized language and KPIs to help investors benchmark the performance of DESCos. Partnering with the IFC / WB and UNCDF, the broad aim is to increase the availability of commercial finance for DESCos and the PAYGO market segment.
• Build dedicated data infrastructure to report on such KPIs, including assessing the quality of available data and developing tools to improve data collection and processing by DESCos. This work is led by the IFC / WB, Village Power and The Impact Lab, and supported by the UNCDF CleanStart.
• Plan a workshop to be held at our AGM on PAYGO/DESCOs. This will include a presentation from CGAP on access to energy and finance, an overview of our data / KPI work, and possible further presentations on data by the GSMA and PAYGO for institutional applications from Lighting Africa.
b) Policy
Formerly the Policy and Regulation working group, the Policy group consulted DFID on its Compact document which will be signed by 14 African states (see joint GOGLA / ODI report at www.gogla.org/resources). The group consolidated industry opinions into a policy handbook, Delivering Universal Energy Access – The Industry Position on Building Off-Grid Lighting and Household Electrification Markets.

The working group also established relationships with national associations from Asia and Africa, with the goal of establishing a network and strengthening national industry representation. To promote the exchange between government, donors and industry, it is organizing a session on the Kenyan market environment during the upcoming members’ meeting.

c) Quality Assurance
The working group on Quality Assurance is now called Technology. After last year’s AGM, in which the working group discussed the next steps in transferring the WB Lighting Global QA program, a subsection of the GOGLA Office, Board and working group was formed. Members have been working on elaborating GOGLA’s view on possible roles in the future QA system; and has subsequently produced an expression of interest.

d) Sustainable Value Chains
This is now known simply as Sustainability, in line with our commitment to make language more accessible. The group met several times to determine the best ways in which GOGLA can support members and the industry, and share best practice on issues like ethical sourcing, end-of-life recycling, social standards for staff and co-workers, and ethical treatment of consumer data.

With progress constrained by a lack of resources, the Sustainability working group will focus on resourcing strategies, working with partners like Edinburgh University to deliver its work plan.

e) Social Impact
A major focus for the Social Impact working group was creating and publishing harmonized metrics (part of the GOGLA strategic priority for data collection). Launched at the AGM in June 2015, the metrics aim to attract more investment, working capital, and regulatory support for the sector. Taking a more nuanced approach to energy access resolves a previous shortfall in energy access categorization and therefore a shortfall in the ability to measure impact at a social level. The metrics are available at: www.gogla.org/resources.

Since January 2016, social impact metrics were collected from companies for the first time. These form a secondary report that complements the Sales Data report, to be released shortly. Since the metrics were finalized, the working group has re-convened to review and update them, and to extend their scope to solar home systems.
6. Update on other areas of work

a) Engaging the humanitarian sector

- Regular participation in SAFE Steering Committee calls.
- **Ingun Berget** from BRIGHT made a presentation on behalf of GOGLA at the SAFE Humanitarian workshop in Kampala, Uganda hosted by the Global Alliance for Clean Cookstoves and UNHCR.
- Facilitated a side event, **Powering Humanitarian Relief**, for the UN’s Energy Access Practitioner Network at the IOGLC 2015. Speakers came from UNCHR, Mercy Corps, Lighting Global, Chatham House and several GOGLA members.
- Attended the launch of the report, **Saving Lives, Reducing Costs**: Heat, Light, and Power for Refugees, by the Moving Energy Initiative, including a session on private sector engagement opportunities in refugee contexts in Geneva.
- Engaged with relevant stakeholders including GIZ, The Level Market and the International Committee of the Red Cross.

b) Engaging distributors

In order to engage distributors more actively, we held a workshop in cooperation with the Frontier Innovations Foundation during the Dubai conference, inviting non-manufacturing distributors to exchange ideas and share common challenges. We also organized a webinar in cooperation with the BoP
Innovation Centre in February 2016, where distributors shared insights on different business models (see section 4). A further session will be hosted by GOGLA and the BoP Innovation Centre during the members’ meeting in May 2016. Such activities will help inform potential future activities of GOGLA around the facilitation of knowledge exchange.

c) Expanding our focus to India
As part of our broader sectoral work, we made two exploratory visits to India. During these visits (requested by the Climate Works Foundation – CWF), more than 40 stakeholders met to identify the potential value-add that GOGLA and Power for All (see section 3) could bring to the Indian market. Proposals are being discussed with CWF for potential further financing.

d) Strategy review
As part of an internal team retreat, we reviewed progress against our strategy in December 2015. We agreed that while focusing on a limited set of priorities is the best way to channel limited resources, this was not always conducive to responding to industry needs and the expectations of individual members. Going forward therefore, we will better distinguish between core association work (geared towards the needs of members), and sector support (setting priorities to help move the industry forward). For core work, we need to become financially independent, while sector support can draw on external funding, as described in three separate programs, which have been discussed with (and approved by) GOGLA’s Board of Directors and Advisory Board.

7. Membership update
As of April 2016, GOGLA has 73 members, a 46% increase from a year ago. Only three companies did not renew their membership between November 2015 and March 2016. At the AGM, we asked attendees to complete a satisfaction survey. We followed this up with an online survey to reach those who did not attend the AGM. This gave us a valuable insight into the member experience and a steer on reassessing our member communications.

Here are a few highlights from the member survey.

- 15 members (out of 25 who responded) gave a score of 4 out of 5 (5 being the highest score) for the work and performance of GOGLA.
- 18 gave a score of 4 out of 5 for meeting the expectations of an industry association.
- 10 gave a score of 4 out of 5 for GOGLA’s communications.

Following the members survey, our Senior Communications Advisor put together some recommended steps to improve our communications with our members. These include more regular newsletters (from every 3 months to every 6-8 weeks). We have implemented this to some positive feedback. Our newsletters are now shorter and with more ‘bite-sized’ round-ups which summarize our progress and priorities. We also include a profile (a ‘day in the life’ style) in each newsletter of different member of the GOGLA team, and include guest blogs. This was in response to feedback that our members don’t know who we are or what we do as individual members of the secretariat.
It was also felt by some members that our industry papers and reports need to be clearer. As a result, we’ve clarified our key messages and made our tone of voice more engaging, accessible and clearer. This is brought to life in our new website, launched in April 2016.

An M-KOPA technician carries a new solar home system up the long track to the rural home of a new off-grid customer near Kiboswa, Kenya. Photo by Jeffrey M. Walcott.

8. Employee update
The GOGLA team expanded from eight (five full-time equivalent), to 12 (9.2 full-time equivalent) over the reporting period. Current team members are:

- Koen Peters, Executive Director
- Johanna Diecker, Program Manager Enabling Environment
- Eduardo Appleyard, Program Manager Access to Finance
- Hans-Peter Birkhofer, Technical Director
- Pabla van Eck, Adviser Humanitarian Assistance and Sustainability
- Carine Verveld, Financial Manager
- Anna Wells, Senior Communications Advisor
- Darragh Cotter, Communications Advisor
- Sascha Brand, Junior Communications and Events Advisor
- Anne-Marie Illes, Research Trainee
9. Financial management and fundraising

a) Financial Management
At the start of last year, GOGLA moved its activities from a Hong Kong Limited company to a Netherlands-based Association. This meant that our financial year also changed to a January-December accounting year (from a June-May accounting year in Hong Kong). Full details are provided in the following individual financial reports:

- for the Hong Kong company from June to December 2014
- for the Hong Kong company from January to December 2015
- for the Netherlands association from January to December 2015

The main activity influencing the budget in 2015 was the Dubai conference. This was however managed as a ring-fenced project, independent of the GOGLA accounts. Deducting the Dubai conference income and expenses shows the results for GOGLA Association itself.

<table>
<thead>
<tr>
<th></th>
<th>Consolidated report, in EUR</th>
<th>4th International Conference, in EUR</th>
<th>GOGLA Association, in EUR</th>
<th>GOGLA Association, in USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income</td>
<td>1,381,510</td>
<td>689,137</td>
<td>692,373</td>
<td>814,556</td>
</tr>
<tr>
<td>Expenses</td>
<td>-1,177,853</td>
<td>-551,090</td>
<td>-626,763</td>
<td>-737,368</td>
</tr>
<tr>
<td>Result before financial income</td>
<td>203,657</td>
<td>138,047</td>
<td>65,610</td>
<td>77,188</td>
</tr>
<tr>
<td>Financial income</td>
<td>2,740</td>
<td>-15,390</td>
<td>18,130</td>
<td>21,329</td>
</tr>
<tr>
<td>Result</td>
<td>206,397</td>
<td>122,657</td>
<td>83,740</td>
<td>98,518</td>
</tr>
</tbody>
</table>

Despite different accounting approaches and years making it difficult to compare data with previous years, overall the profit and loss statement shows a significant growth since 2014, with income 35% higher than foreseen in the 2015-2018 strategy (USD 600,000 for 2015).

The main income sources in 2015 were membership fees (EUR 122,719 / circa USD 144,000) and grants totaling EUR 510,788 (circa USD 600,000), the remainder consisting mostly of contracted work. Grant support included core funding grants (i.e. not earmarked) from the IFC (USD 140,000) and Shell Foundation (USD 280,000). The dominant expense item for the Association is salaries of EUR 542,300 / USD 638,000. Going forward, the GOGLA Association expects that it will continue to rely on core funding grants for several years before reaching full financial independence.
b) Funding

Shell Foundation and the IFC
Both Shell Foundation and the IFC continued to provide core funding. A contract running to 2017 was negotiated with IFC worth USD 280,000 while Shell Foundation continued to fund GOGLA into the first half of 2016 with a bridging fund of USD 300,000. It has confirmed its intention to move to a multi-year funding agreement.

Climate Works Foundation
The Climate Works Foundation supported GOGLA and Power for All with USD 150,000 to research a specific strategy for India, which has helped us scope out the potential of expanding our work there.

DFID
DFID is supporting the Power for All campaign. The funding for the campaign is partially channeled via Practical Action through GOGLA.

Packard Foundation
The Packard Foundation have contributed USD 35,000 to the kerosene research project in India.

GIZ
GIZ supported GOGLA’s work with national renewable energy associations with EUR 35,000 to start with.

UNCDF
UNCDF is supporting GOGLA with funding for consultant Eduardo Appleyard who contributes to the delivery of the program on Facilitating Access to Finance, including activities on harmonizing definitions and KPIs for PAYG companies.

Fundraising efforts
The GOGLA office invested a fair amount of time and capacity in fundraising in the last year. As a result, the prospects for core funding secured until end of 2018 are likely, with foreseen contributions from IFC (ongoing), Shell Foundation (ongoing and new, partly with money from DFID), and USAID (new).

There are promising leads for (parts of) GOGLA sector support programs, again partly through ongoing relationships with funders like DFID, CWF and UNCDF, as well as some potential new funders (e.g. RECP and private foundations). Parts of the sector support programs may also be delivered through non-financial cooperation, e.g. by aligning priorities with actors such as WB ESMAP.

As we will need to develop our own income streams for core association roles in the coming years, we will continue to seek sponsorship income for its events as well as exploring other possible routes for generating income.
10. Progress against KPIs

The GOGLA Board has agreed on a number of KPIs to track and report progress to members and funders. These were presented to the AGM as part of the 2015-2018 strategy at the Amsterdam meeting.

<table>
<thead>
<tr>
<th>Financial mgmt</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Annual income secured (USD)</td>
<td>$ 600,000</td>
<td>$ 900,000</td>
<td>$ 1,200,000</td>
</tr>
<tr>
<td>• Membership fees (USD)</td>
<td>$ 125,000</td>
<td>$ 187,500</td>
<td>$ 250,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Member interests</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Total member sales (no of products/USD sales)</td>
<td>Baseline established</td>
<td>&gt; 150% of 2015 sales</td>
<td>&gt; 150% of 2016 sales</td>
</tr>
<tr>
<td>• Member satisfaction (grade from questionnaire)</td>
<td>Baseline established</td>
<td>Equal or better than 2015</td>
<td>Equal or better than 2016</td>
</tr>
<tr>
<td>• Member retention (% members leaving GOGLA while still in business)</td>
<td>&lt; 5%</td>
<td>&lt; 5%</td>
<td>&lt; 5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operational processes</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Transferred Lighting Global activities (QA; market data; bi-annual conference)</td>
<td>50%</td>
<td>75%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outreach &amp; communication</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Lead market/impact data provider</td>
<td>Off-grid Lighting (Solar lanterns)</td>
<td>Off-grid lighting + SHS</td>
<td>Off-grid lighting + SHS + appliances</td>
</tr>
</tbody>
</table>

For 2015, GOGLA has met all the KPIs. Looking ahead at 2016, GOGLA looks well on track for the majority of KPIs, although some that are less directly influenced by GOGLA may prove (too) ambitious, such as the year-on-year growth of member sales of 50%.
11. Looking ahead

Looking ahead, we will move forward in the direction set out in our strategy review, building our role as an industry association that speaks on behalf of, and serves its members, while also delivering sector support programs that serve the interests of the wider public good. Details on how this will be delivered in the next year are given in the 2016 Work Plan and the three program descriptions, which will be presented to GOGLA members at the 2016 AGM in Nairobi (and will be available from the GOGLA Office).