For GOGLA, and for the wider off-grid solar sector, 2017 was another productive year. We achieved a lot at GOGLA with a small but growing team.

Our Annual General Meeting took place in Paris in May, with over 150 participants gathering in the Parian sunshine. The AGM gave us an opportunity to celebrate with our members and associates the landmark of GOGLA reaching five years. We marked this with a special evening reception, supported by Total, and on the last day of the conference we held a symposium presenting the latest research on the off-grid solar market and its customers to our members.

Beyond our AGM, we organized a series of other targeted regional events in key markets, providing valuable opportunities for members to meet, network and exchange information. Out of these events came some very fruitful partnerships. An important role for us as the voice of the industry is to enable our members to drive forward the discussion on the development of the sector, so we made sure we get input from our Working Groups when building the agenda for these events.

One event in Abidjan, Côte d’Ivoire, was a significant milestone for us and represented a step forward for the sector. ‘Unlocking Solar Capital’ in October was co-organized by ourselves and Solarplaza. This ambitious event brought together more than 20 governments from across Africa as well as key industry players, investors and developers partners. Not only was the event our first major activity in West Africa, but it also represented a big leap forward in our policy work. Alongside the conference, together with the African Development Bank, we organized a government–industry dialogue day whereby we presented a guide for governments on the state of play of the off-grid industry. We also developed a new government outreach strategy designed to influence policymakers, in particular in the light of our advocacy work in 2016 with the East African Community.

This year, we received praise and recognition by the public sector for our role as the voice of the industry, and events such as the one in Abidjan have helped to make that voice grow even louder in 2017. We formalized a partnership with SEforAll and with GSMA for this year. Alliances such as these will help propel us as a sector.

During the year we have greatly increased our ability to collect, process and report data. More than ever, our members are benefitting from stronger, more informative and accessible data across sales, investment, impact and policy. And across the year two further Semi-Annual Sales and Impact Data Reports were launched, covering H2 2016 and H1 2017, released in May and October respectively. These reports showed a drop in sales for our sector, highlighting a continuation of strong external factors affecting the results. The reports also underlined for us the importance of having accurate data on the market. With an increasingly nuanced understanding of the market, each round of data collection for these biannual reports helps us to better tailor our calls to action to governments, investors and donors looking to support the sector. On the whole, we are witnessing a market that is both resilient and buoyant, with companies taking an optimistic approach.

The GOGLA team grew over the year, too. The appointment of two regional representatives in East Africa and India highlights how we’re growing our market and its customers to our members.

Luckily, we’re well supported as a sector. While 2017 saw some exciting investment wins for our members, our recognition as the binding force for the sector was buoyant, with companies taking an optimistic approach. Ned Tozun, the CEO and co-founder of d.light, one of our founding member companies, summarized this well. “We’re still in the very early days of the sector, with vast untapped potential in terms of market penetration.” Indeed, with so much growth in the last few years, it is easy to forget that we are still a relatively young industry.

What does GOGLA stand for?

During 2017, the Board of Directors and GOGLA team took a step back and reassessed GOGLA’s focus and strategy. As such, we identified our mission, vision and objective as follows:

Mission

GOGLA is the industry association for the off-grid lighting and electrification sector. Its mission is to help its members build sustainable markets, made up of successful companies, delivering quality, affordable off-grid electricity products and services to as many customers as possible across the developing world.

Vision

GOGLA’s vision is that all households and businesses across the developing world can easily access GOGLA members lighting and electricity products and services in the market.

Objective

GOGLA’s objective is to support all its members with first-class resources and services to help grow and sustain their businesses and the market, thus helping them to contribute to the Sustainable Development Goals, in particular universal energy access by 2030.
To be the undisputed voice of the industry

GOGLA is increasingly accepted as the voice of the industry by a number of donors, multinational development banks and other sector bodies, thus acting as a central sounding board and meeting place for the sector. We should build on this and strengthen that position. For this to materialize, our staff will continue to take an active role at advocating GOGLA’s role as voice of the industry at events around the globe. We will be responsible for regularly producing major reports, guidelines, market insights, government guidance notes and industry opinions. Such publications help us to uncover and provide vital knowledge and insights, build capacity and expertise within the sector. We will continue to invest time and resource into our vital lobbying work. For GOGLA to be a true voice of the industry we also need to take leadership in promoting and harmonizing standards on quality and consumer protection, and on doing business in a responsible and transparent way.

What would success look like here?

GOGLA would become accepted as ‘spokesperson’ for the industry on all important sector interests, such as standards, and we would be invited at the leading international policy tables. We would continue to see good results from our policy work.

Strategy 2017 - 2020

From 2017, GOGLA’s strategy - the course of direction - was addressed and reviewed. With buy-in from members, the Board and staff, we identified GOGLA’s headline strategic priorities as follows:

Putting member value first and prioritizing sector activities based on member needs

First and foremost, we are an industry association representing our members, so GOGLA will prioritize activities based on industry needs. This means getting members involved, asking them where they need support, but also taking the lead in identifying future market barriers and needs ourselves. We must ensure we have a good line of communication always open with our members and keep them involved in various ways. We are also looking at increasing our member guidance, via email and direct support. The Working Groups remain a central vehicle for involving and consulting with our members but we are also exploring other forms of interaction and communication with them (through regular webinars, for example) to ensure they remain a central part of our operations.

What would success look like here?

We would look for high member satisfaction rates, with members feeling that they get good value for money from our service.
To make pro-active communication and increase visibility outside the sector

If GOGLA is to be successful in helping the sector achieve its goals and reach universal energy access by 2030, we need to raise our profile and become more ‘mainstream’. This will involve mapping and prioritizing influential sectors and areas such as social media, FMCG distributors, mobile telecom, electronics and fintech and microfinance. We will need to make closer and more effective links and partnerships with the private sector and normalize product standards.

Target continued growth based on donor funding

During 2017, the GOGLA Board of Directors and the Advisory Board steered the Executive Director away from one our existing strategic priorities; ‘to increase financial independence’. Instead, the Board collectively agreed that working towards continued and growing impact on the market, based on donor funding, was of higher priority in the context of the needs of the sector and our own resources. As such, the final strategy headline from Strategy 2017 – 2020 was superseded.

By focusing on continued growth, the aim is that GOGLA will be able to deliver:
- Market intel and impact insights that are substantially enhanced by in-depth country and topical research
- Continued and strengthened representation in key regions, leading on advocacy and building capacity of national industry representation
- Continuation of a range of networking and convening activities, reinforced with additional thematic events

A broadened GOGLA technology focus

Finally, as proposed by the GOGLA Board and approved by GOGLA members, it was agreed that all of the above should be applied to a broader range of technologies, and thus potentially a broader range of members. Beyond solar lighting and solar household electrification, GOGLA will increasingly position itself as the off-grid solar electrification industry association that also represents solar powered household appliances; solar powered productive use appliances (pumps, cooling etc); off-grid solar electrification of social institutions such as schools and clinics; and larger stand-alone installations for commercial and industrial clients.

As part of our governance structure and legal requirements as an association, GOGLA has agreed policies for key areas of work, outlined below. Our daily operations and financial management is implemented in accordance with these core policies:

- GOGLA Membership Policy
- GOGLA Code of Conduct
- GOGLA Guidelines for Corporate Social Responsibility
- GOGLA Ethical Review Committee Policy
- GOGLA Gender Representation Policy
- GOGLA Anti-Bribery and Corruption (ABC) and Anti-Money Laundering (AML) Policy
- International Aid Transparency Initiative Reporting

You can view these policies on our website. Head to www.gogla.org/about-us/statutes-by-laws-policies
Progress across GOGLA’s sector support programs

One of GOGLA’s key objectives is to help the industry grow quickly but sustainably, so during 2017 we continued our operations with an emphasis on serving our members, and thus the wider sector, to deliver sustainable growth.

Our focus remains on three core areas:

- Creating an enabling policy and regulatory environment
- Mobilizing investment / facilitating access to finance
- Product quality and consumer protection

Here is an update on our progress across the year:

**Enabling environment**

In this work stream, GOGLA carries out activities that are geared towards an improved enabling environment on the policy and regulatory side. One of the key elements is advocacy towards policymakers and development partners. In 2017, our team was reinforced by Susie Wheeldon, Research Advisor (joining full time from April onwards) and Charlie Miller, Senior Policy Advisor, (working as part-time consultant). In addition, the newly added regional representatives, Viraj Gada for India, and Patrick Tonui for East Africa, increased the capacity of the overall GOGLA team and enabled more effective policy work on the ground.

With the objective of more pro-active government engagement and outreach and ensuring GOGLA’s recognition as the voice of the off-grid solar sector by governments, we initiated with partners the concept of government industry dialogue days. The first of its kind was organized in cooperation with the African Development Bank in Abidjan at the end of October. To enable insightful conversations when engaging policymakers, we developed the guidance note for governments in 2017. The modular document shares information on the benefit for governments to embrace market-based solutions and summarizes key industry views and opinions on a number of topics.

As part of our partnership with EU-Africa Renewables Cooperation Program (RECP), we carried out various events across the year, taking different forms, and all aimed at lowering the barriers to investment and helping facilitate contact between investors and off-grid solar companies. These include a ‘Masterclass’ series, topical conferences, regional conferences, donor co-ordinations and matchmaking events. Across the year, we organized 12 events across the categories, totaling almost 720 participants. In addition to the events organized with RECP, a strong focus of 2017’s Access to Finance work was preparing the Business Development and Access to Finance tracks of the Global Off-Grid Solar Forum and Expo.

Already mentioned in this report was a particular highlight event, Unlocking Solar Capital Africa, in Abidjan in October, which brought together industry, investors, and development partners. The event was the second of its kind and signaled several different forms of expansion for us. Firstly, it was GOGLA’s first major activity in West Africa, it was also co-located with our first off-grid solar industry and government dialogue day, co-organized with the African Development Bank. And finally, the event marked the start of our partnership with GIZ’s Financial Systems Development team. An event of this kind demonstrates that we are increasingly well-placed to work with diverse partners, each bringing unique expertise and support to the industry.

**Facilitating Access to Finance**

In this work stream GOGLA carries out activities that help mobilize investment and increase access to finance for the sector. These activities have focused on generating and sharing robust market intelligence as well as facilitating interaction and knowledge-sharing among industry, investors, and other stakeholders through dedicated conferences and events.

Over the course of the year, we continued to develop our knowledge base around business development services, investments, and sales in the sector through dedicated research. Our biannual sales data report forms the backbone of this research, and in January 2017, we launched a new online data platform to help collect, process and share the ever-expanding sales data in a more efficient way. With sound data forming such a driving force for the sector, informing financiers and governments and leading to improved market intelligence, the new online platform offers a snapshot in time of the sales and impact for every six-month period. This new platform, which captures around 30% of the total market, provides robust data on sales, cash revenues and installed capacity. It also helps to highlight the stark differences, in terms of sales and revenues, between countries.

During 2017, in addition to providing sales data to industry members, we also supported several partners and stakeholders in making the best use of available market data. In the first quarter, we shared advice on market development and customized data sets with the UK’s Department for International Development, the International Energy Agency (IEA), SE4All and others.

Going beyond sales data, in the second half of the year, we commissioned Dalberg Advisors to produce a comprehensive database on investment into the off-grid sector. Drawn from several sources, including industry interviews, the database captures investment data going back to 2012. It was used as a key data source for the 2018 Off-Grid Solar Market Trends Report, launched in early 2018, where it formed the basis of Dalberg’s analysis of investment trends and the needs of the off-grid sector.

Also, notably during 2017, we expanded our ability to collect, process and report data through the addition of a Data Analyst, Silvia Franciosi, to the team in November. This expansion represents good news to our members since our data activities across sales, investment, impact and policy data will be even more informative and accessible than before.

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Quality assurance and consumer protection

This program focuses on the consumer experience; promoting good quality products and services that deliver impact for customers and build stronger businesses.

An intellectual property (IP) infringement guidance paper was presented and published in March and is now available on the Technology Working Group member space of the website. In addition, we hosted a webinar by REACT (the anti-counterfeit organization) in which IP challenges were discussed.

In March, we completed and published our Quality Assurance Guidance paper. This included an online table providing product quality standards information, test methods, certification and country level details. Members were invited to contribute. In May and November, GOGLA represented the industry at the IEC TC82 (for solar photovoltaic energy systems) committee meeting that is managing the transition of the Lighting Global Quality Assurance standards. Over the course of the year, we followed the transition of the Lighting Global Quality Assurance program from IFC to CLASP, and have developed good working relationships with CLASP. We supported Lighting Global with the transition and in informing the strategy, coordinating fundraising and communicating transition issues to our members. In cooperation with CLASP and Lighting Global, and with the unanimous support from the Technology Working Group and our Board of Directors, the decision was made to submit the Lighting Global standards for pico-PV lighting to the IEC, thereby promoting harmonized standards across markets.

John Keane, Program Manager for Quality Assurance and Consumer Protection, left GOGLA in Q3. The replacement process was slower than hoped but by November 2017 a replacement had been recruited in the form of Drew Corbyn, who started in early 2018. Drew joined us with over 10 years experience of working in the rural electrification sector.

Also during 2017, we prepared for an initiative to establish a consumer protection Code of Conduct, building consensus on the need for the development of industry standards during May’s AGM, and later securing funding for the process. The sustainability Working Group is leading the process to define the focus and implementation of the framework.

Upgraded GOGLA website

During Q1, we identified and contracted a new web-developer and made some decisions on the new structure. By Q2, the updates and upgrades had gone live with a continuing improvement on-going. Later in the year we also rearranged the ‘Member’ section of the website for easier navigation.

How have we progressed on key deliverables?

Each year we track our progress against key deliverable tasks which were included in a work plan presented to our members at the AGM.

For 2017, we had six specific deliverables, such as preparing for the Hong Kong Conference in January 2018 and expanding our team. So, how have we done against these?

2018 Hong Kong conference and exhibition

By the end of Q1, we had confirmed the venue and dates for the conference (22 – 24 January 2018), had sent out a ‘save the date’ notification to our network and had contracted an event management company on the ground. In Q2 we recruited a Relationship and Event Management officer, Eveline Jansen, to lead on conference preparations, and by Q3 we started seeing the first few registrations. We spent this period focusing on identifying and securing the first few sponsorship and booth packages. By the end of the year sponsorship and booth packages were selling very well, helping us reach 100% of our target for those budget elements. As 2017 came to a close, we finalized the agenda and sessions and we had secured around 300 registrations, ensuring that the event would reach break-even point.

GOGLA 2017-2020 strategy prepared and presented to members

In the first quarter of the year a draft strategy document was drawn up, and Koen Peters presented it to the Board of Directors and Advisory Board. This was then adopted by the Board and presented to GOGLA members at our AGM in May.

Membership fee structure revision

In Q1, a proposal for a revised membership fee structure was shared with GOGLA’s Board of Directors. The revised fee structure was then adopted during the AGM in May.

External impact evaluation

In the first quarter of the year, a ‘Terms of References’ document was drawn up and potential consultants were identified. By Q2, Altai consultants had been contracted and the first draft of their study was shared, final results of which were shared with the Board of Directors and Advisory Board in August. You can find out a little about the findings of Altai’s evaluation of GOGLA on page 14 of this report.

Team extended with regional representatives in East Africa and India

By Q3, a regional representative for India was added to the team and by the end of the year, both regional representatives (Patrick Tonui based in Nairobi, and Viraj Gada based in Mumbai) had joined the GOGLA team.
We assess our Key Performance Indicators (KPIs) on a regular basis and in 2017 GOGLA’s KPIs underwent review and were amended as a result. This review followed an external evaluation on the organization by Altai Consulting which was appointed by GOGLA’s management team to conduct an external evaluation of our impact and influence over the past three years (2014-2016). While Altai’s mandate was to explicitly focus on our impact, the approach resulted in some very valuable insights which have helped steer our leadership, shape our strategy and programming going forward. The purpose of the Altai review was also to help us improve the tools used to track our future impact.

During the Altai evaluation process (which took place in Q3) it became apparent that our previous KPIs were not representative of our impact in the market. It was determined that the KPIs failed to encapsulate fully the impact GOGLA has had, has, or will have in the future, so we were advised by Altai that our KPIs should be revised and enriched to better reflect all our activities. As such, the new KPI reporting structure was agreed by the Board of Directors on 30 November 2017. The table below shows progress against the operational performance indicators agreed for 2017. No targets were set for progress against outputs but these will be reported on from 2018 onwards.

### GOGLA target impact indicators

<table>
<thead>
<tr>
<th>Impact indicator(s)</th>
<th>2017 target</th>
<th>2017 achievement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Promoter Score</td>
<td>Positive NPS</td>
<td>To follow from annual member survey (2017 survey showing achievement for previous year)</td>
</tr>
<tr>
<td>Member satisfaction with GOGLA</td>
<td>Overall grade &gt; 7.5 on scale 1-10</td>
<td>To follow from annual member survey (2017 survey showing achievement for previous year)</td>
</tr>
<tr>
<td>Attrition rate (churn)</td>
<td>% of members losing (while remaining active in sector)</td>
<td>Achieved, no members left who were still active in the industry</td>
</tr>
<tr>
<td>Overall income (excluding 3rd party project expenses)</td>
<td>USD 1.2 million</td>
<td>Achieved, net income circa EUR 1.2m / USD 1.5m (provisional)</td>
</tr>
<tr>
<td>Membership income</td>
<td>USD 260,000</td>
<td>Achieved (EUR 260,000, or circa USD 260,000)</td>
</tr>
<tr>
<td>New members as per membership strategy</td>
<td>n.a.</td>
<td>Membership continued to grow in line with earlier growth. Membership count end 2017 was 117 members</td>
</tr>
<tr>
<td>Website and social media outreach</td>
<td>n.a.</td>
<td>To be reported following from 2018 onwards</td>
</tr>
<tr>
<td>Delivery against annual workplan</td>
<td>n.a.</td>
<td>Core association: 100% Policy &amp; Regulation: 85% Access to Finance: 100% (plus additional tasks beyond work plan) Quality and Consumer Protection: 70% Overall: 80% achieved</td>
</tr>
<tr>
<td>Efficiency: GOGLA office spending/ # of members</td>
<td>n.a.</td>
<td>To be reported from 2018 onwards</td>
</tr>
</tbody>
</table>

Following an election for a new Board of Directors during GOGLA’s 2016 AGM in Nairobi, during the course of 2017 the GOGLA Board of Directors comprised:

- Harry Verhaar (Philips Lighting), President
- Radhika Thakkar (Greenlight Planet), Vice President (Radhika was replaced temporarily by Ben Mathew while she took a sabbatical during part of 2017)
- Andreas Spies (SOLARKIOSK)
- Joshua Pierce (Off Grid Electric)
- Philippe Cabus (Total SA)
- Ti al Attar (NEWA)
- Wolfgang Gregor (Individual), Treasurer

Meanwhile, GOGLA’s advisory board changed in 2017 to include:

- Ilana Cohen, GSMA
- Jim Rogers
- Katrina Palli – USAID
- Richard Gomes – Shell Foundation
- Russell Sturm – IFC
- Walter Kipruto – GIZ Kenya

Our Secretariat team also grew in 2017, and as of the end of the year the total count of GOGLA team members comprised the equivalent of 15 full time staff, including four consultants.

New additions to our team include; a Relationship and Event Management Officer, two regional representatives for East Africa and India, a Data Analyst, and Communications Trainee, to assist in the run up to the Hong Kong conference in January 2018.

Towards the end of 2017 a decision was also made between Koen Peters and the Board of Directors that GOGLA should restructure its team, adding the positions of an Operations and a Policy Director, forming (jointly with the Executive Director) the GOGLA Management Team. Johanna Diecker was promoted to the Policy Director role while a provisional appointment for the Operations Director was made in December.

© Mobisol, a rural household in Rwanda is powered by a Mobisol solar home system.
Financials: some headline updates

2017 was the third full year of GOGLA being an Association in the Netherlands. During the year, we saw not only our project funding grow, but also our core funding expand. This influenced our income level, enhancing our capacity and activities.

- Along with budgeted core funding from IFC and Shell Foundation, GOGLA also received a two-year grant from USAID via Shell Foundation. This enabled us to expand with staff capacity in East Africa. This increased core funding also made it possible to improve and extend our Market Data Collection and Database.
- At the beginning of 2017, a new partnership with RECP ‘Energy Policy in Development Cooperation’ was started, leading to a series of activities and webinars.
- At the end of 2017, GOGLA wrote a proposal to GIZ ‘Enabling investment in off-grid energy in Africa’, which brought in funding to start a project in 2018.
- From spring 2017 onwards, GOGLA received support from Climate Works Foundation to expand its activities in India, allowing the expansion of the team with a regional representative.
- Funding was secured from the Doen Foundation towards the development of a consumer protection Code of Conduct at the close of the calendar year.
- GOGLA continued to cooperate with Solarplaza, co-organizing two conferences in the spring and autumn of 2017. For both parties, the relationship provided a continuing ‘win-win’ situation which also translated into a small profit.
- As a result of GOGLA’s growing global team, we set up a payroll administration in the UK. We also received a special status which enabled us to attract more international specialists needing working permits for The Netherlands.

Looking ahead

We continue to invest a lot of resource in fundraising. As a result, our core funding for 2018 is secured with major contributions from USAID and Shell Foundation.

Regarding project funding, GOGLA secured continuation of the projects of OFID, RECP and GIZ. Also, the Climate Works Foundation continued their project with us in India. The Dutch DOEN Foundation, also started a project with GOGLA in 2018.

We will work with Solarplaza again on a new conference in 2018.

The Global Off-Grid Solar Forum & Expo in Hong Kong, for the first time covered financially 100% of GOGLA’s staffing capacity to organize this large-scale event.

2018 will be taken up with intense fundraising activities, focusing on 2019 and onwards. Furthermore, as in 2017, for the medium to long term we will need to explore other possible routes for generating income. In particular, we will need to develop our own income streams for core association roles, and continue to seek sponsorship income for events.

Tax developments

As from 2016, GOGLA became VAT eligible within Dutch and European legislation. This resulted positively in incoming payments of ‘return on VAT’. The Dutch Tax authority took a final decision on GOGLA’s eligibility for Corporate Income Tax (CIT) and we are now eligible for CIT for income linked to commercial activity. Our core activities, however, will not be eligible.

Membership developments

GOGLA membership grew to 107 by the end of 2017. This also affected our membership income, with a raise of 50% more membership fees in 2017. We expect to see our membership grow in 2018 too. Together with the newly adopted membership policy (agreed during the Paris AGM in May 2017) we expect the membership income to almost double.

Results

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<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Total income</td>
<td>€ 1,741,492</td>
<td>€ 1,576,209</td>
<td>€ 692,373</td>
</tr>
<tr>
<td>Member income</td>
<td>€ 205,992</td>
<td>€ 128,702</td>
<td></td>
</tr>
<tr>
<td>Core funding grants</td>
<td>€ 837,059</td>
<td>€ 576,071</td>
<td></td>
</tr>
<tr>
<td>Projects</td>
<td>€ 649,660</td>
<td>€ 626,412</td>
<td></td>
</tr>
<tr>
<td>Other Income</td>
<td>€ 48,761</td>
<td>€ 45,024</td>
<td></td>
</tr>
<tr>
<td>Expenses</td>
<td>€ 1,666,968</td>
<td>€ 1,367,900</td>
<td>€ 626,763</td>
</tr>
<tr>
<td>Result before financial income</td>
<td>€ 74,524</td>
<td>€ 8,309</td>
<td>€ 65,810</td>
</tr>
<tr>
<td>Financial income</td>
<td>€ 33,433-</td>
<td>€ 11,957-</td>
<td>€ 18,150</td>
</tr>
<tr>
<td>Result before tax</td>
<td>€ 41,091</td>
<td>€ 3,648-</td>
<td>€ 83,740</td>
</tr>
<tr>
<td>Taxes CIT 2015</td>
<td>€ -</td>
<td>€ 20,571-</td>
<td>€ -</td>
</tr>
<tr>
<td>Result after taxes</td>
<td>€ 41,091</td>
<td>€ 24,219-</td>
<td>€ 83,740</td>
</tr>
</tbody>
</table>

Full details are provided in the Annual Accounts 2017 (January – December) and can be requested at the GOGLA office in Utrecht, The Netherlands. Please note, the Annual Accounts 2017 will be audited after publishing this report, therefore the results are provisional.

© Qotto, GOGLA welcomed Qotto as its 100th Member in July 2017
GOGLA’S Members as of December 2017

Individual Members
Wolfgang Gregor
Andrew Reicher
Peter Gutman
James Norman Bardsley