



G^OGLA Annual Report 2018



Highlights of 2018

2018 has been another year of growth. With a rising number of members and continued support from an increasing pool of donors, we were able to strengthen our team and provide valuable activities to support our industry and members.

2018 started strong for both GOGLA and for the solar industry as a whole. In January, we hosted our Global Off-Grid Solar Forum and Expo in Hong Kong. We brought together almost 700 professionals from 65 countries. Now a major landmark sector event taking place every two years, the 2018 edition was the biggest, busiest and most productive conference to date. A full report on the event can be found [here](#).

At start of the year we released the **2018 Off-Grid Solar Market Trends Report**, and discovered that the market for off-grid solar devices is seeing dynamic growth. How much growth? Back in 2010, the landscape was made up of around 60 suppliers of small-scale solar devices. Now there are close to 350 players occupying that same space. As the voice of the off-grid solar energy industry, we have a lot of work to do to represent those companies.

2018 was also a remarkable year for GOGLA's consumer protection work. Together with our members, we placed the spotlight on consumers as the driving force of the market. We developed a sector-wide 'Code of Conduct'. The Code is **a set of principles** on how off-grid solar companies should engage with their customers and furthers one of the three main outcomes of our work: quality assurance and consumer protection.

During the summer, we launched a major new report, **Powering Opportunity**. This milestone publication brought to light how our sector is having a life-changing social and economic impact on millions of lives. Nearly 60% of households undertake more economic activity within three months of using a solar home system. This means they work longer, start businesses or get a new job. An impressive 94% of households say their product has improved their quality of life. This proves that our industry is transforming and improving lives with every off-grid solar product

sold. We invested significantly in sharing these important findings with presentations in Nairobi, Kampala and Kigali. We also developed a highly successful integrated campaign, leading to more than 70,000 video views and over 12 million on and offline views.

In November, we co-hosted with some of our key partners a 'Community of Champions' event in Kigali, Rwanda which opened up a dialogue between governments, the private sector and development partners. Our goal was to find ways of working collaboratively towards a supportive policy environment to achieve universal energy access in Africa, furthering another key outcome of our work: creating an enabling environment. This was organized back-to-back with the third edition of Unlocking Solar Capital, an investor conference that we co-organize with Solarplaza. Read more about Unlocking Solar Capital later in this report. During the event, we launched PAYGo PERFORM together with The World Bank Group's Lighting Global program and CGAP – a new initiative designed to process, analyze and report on PAYGo finance and operational performance to support the final pillar of our work: mobilizing investment.

We closed the year with our first attendance of the global climate summit COP24 in Katowice, Poland. Our exhibition booth saw a lot of footfall, creating a buzz of interest around our members' products on show. Our presence at the summit gave us the opportunity to speak to over a dozen government representatives and confirmed our status as a voice within the climate community.

We look forward to using our increasingly amplified voice to represent the sector this year. As we look towards 2019 and beyond, I'm very confident that, as an industry, we will continue to perform and deliver impact on a global scale. Let's go further, faster, together!

Koen Peters



We were able to strengthen our team and provide valuable activities to support our industry and members.



What does GOGLA stand for?

We are committed to our mission, vision and objective, which remain unchanged since we identified them formally with our team and Board of Directors in 2017. Since then, as a team, we have further reflected on what we stand for as an organization. We're also able to substantiate our approach with evidence proving that we are helping to grow the off-grid solar sector.

Our mission

GOGLA is the global association for the off-grid solar energy industry. Our services assist the industry to build sustainable markets and profitable businesses delivering quality, affordable off-grid electricity products and services to as many customers as possible across the developing world.



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Our 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.



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Our belief


We believe that with the right support, the off-grid solar market can provide affordable solar power products and services to the 1 billion people currently living without energy by 2030, in line with Sustainable Development Goal 7. Off-grid solar products and services are also a solution for the estimated 1 billion people with weak grid connections.



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Our 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.



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GOGLA policies

As part of our legal requirements as an association, GOGLA has agreed policies for key areas of work, outlined below. The following policies underpin our daily operations and financial management:

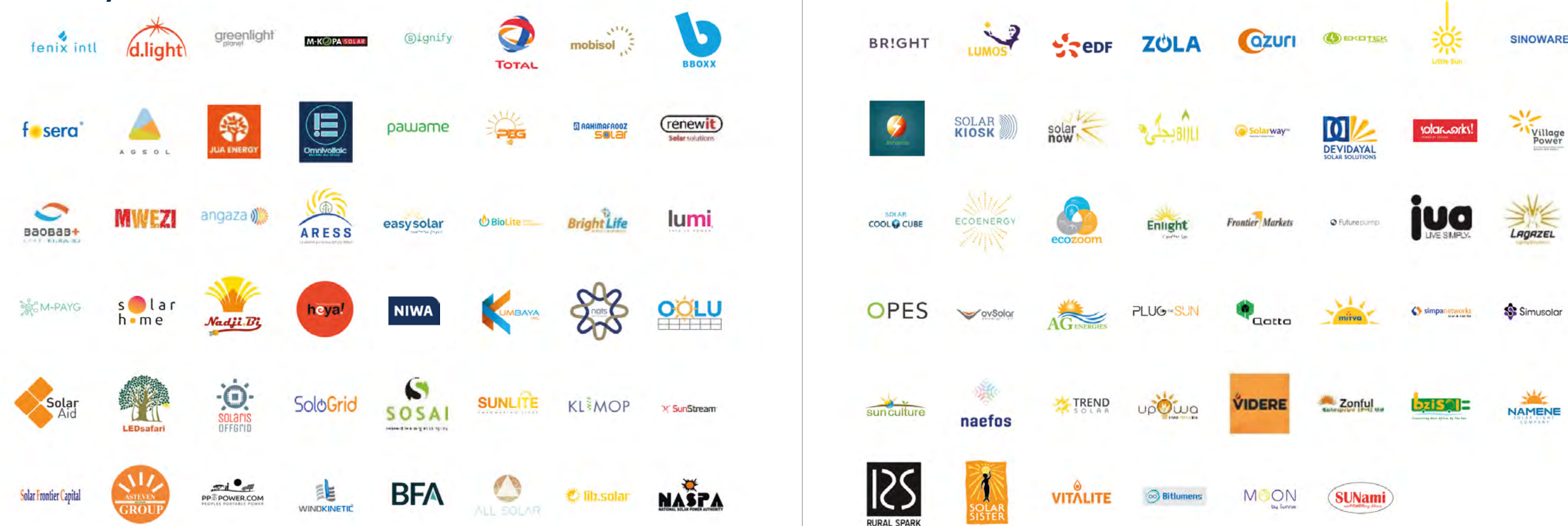
- GOGLA Membership policy
- GOGLA Code of Business Conduct
- GOGLA’s Code of Conduct for Corporate Social Responsibility (CSR)
- GOGLA Ethical Review Committee Policy
- GOGLA Gender Representation Policy
- GOGLA Anti-Bribery and Corruption (ABC) and Anti-Money Laundry (AML) Policy
- International Aid Transparency Initiative Reporting

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Download our policies
from the website.
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Who are our members?

Industry



Associated



2018 at a glance

It's impossible to summarize the diversity of achievements and successes of the past year into just a few bullet points. So, we've selected some of the highlights from our members, partners and from the wider sector we shared in 2018:

Q1

- OPES Solutions reached a landmark when it announced it had **produced four million off-grid modules** since the start of manufacturing in 2012.
- d.light secured a massive **\$50m in debt finance from the European Investment Bank** as well as from fellow GOGLA members including responsAbility and SunFunder. The funding will help d.light to continue its global scale-up.
- The Government of India's Ministry of New and Renewable Energy announced a major new scheme. The **KUSUM scheme** ('Kisan Urja Surksha Utthan Mahaabhiyan') is still being finalized and yet to be formally approved, however its goal is to install grid-connected solar plants of up to 2 MW in rural areas; install standalone off-grid water pumps to meet irrigation needs of farmers and solarize existing grid-connected agriculture pumps to make farmers independent of the grid
- TRINE and BBOXX **raised 1m Euros in record time** through a successful crowdfunding campaign, to provide BBOXX with debt finance to scale its operations.
- A high-profile launch in India of the **International Solar Alliance campaign** in March demonstrated India's potential as a leader in the solar industry.

Q2

- Two **GOGLA members won 2018 Ashden Awards** in June. Angaza won the Award for Financial and Business Model Innovation, while Lumos Global won the Award for Energy Access Frontiers.
- Mobisol announced a partnership with StarTimes Media to **bring the FIFA World Cup to off-grid households** across Tanzania, Kenya and Rwanda.
- Singapore-based SolarHome **scored \$2m to bring solar into off-grid households in Southeast Asia** and announced plans to establish a presence in Cambodia, Indonesia and the Philippines by the end of this year.

Q3

- SE4All released **a new report** in July revealing the major risks to vulnerable populations and global economy if greater action and investment is not taken on access to sustainable cooling solutions for vaccines and food supplies
- ZOLA Electric and SunFunder **closed a \$20 million debt facility deal** to support ZOLA's expansion across Africa, bringing affordable energy to an additional 25,000 customers in four countries.
- Togo launched a \$1.8 billion plan to **provide universal access to electricity to 3 million Togolese** with a plan to reach 100% electrification rate by 2030. The plan combines on and off-grid solutions and includes solar kits from GOGLA members Greenlight Planet and BBOXX
- Fenix International moved its global headquarters from San Francisco to Uganda, including its engineering and technology development center. This move makes Fenix one of the first international companies to have its base in the East African country.
- Oolu Solar announced an investment from fellow GOGLA member GAIA Impact Fund. The investment will allow **Oolu Solar** to strengthen its position in Senegal, Burkina Faso and Mali.

Q4

- **Azuri and Unilever partnered in Kenya** to bring pay-as-you-go solar home lighting to millions off-grid. The British off-grid solar company announced a distribution partnership with Unilever during a state visit to Kenya by British Prime Minister, Theresa May.
- The sector saw a **boost in investment from global utility giants** including ENGIE acquiring a controlling stake in Simpa Energy, EDF becoming joint shareholder in BBOXX Togo with a 50% stake, and Portuguese energy company EDP acquiring a minority stake in SolarWorks in Mozambique.
- Greenlight Planet became the **first off-grid solar company to partner with Bollywood** as it became an associate in the movie 'Batti Gul Meter Chalu' which discusses the lack of reliable electricity throughout parts of India.
- Kenya launched a **new strategy for universal energy access by 2022**. Together with World Bank, the Kenyan Government launched the National Electrification Strategy (KNES), providing a road-map to achieving the country's universal energy access goal.

Our activities and services

Our purpose as the voice of the off-grid solar energy industry is to help the off-grid solar sector to grow quickly and sustainably. We do this through four key services:

1. Knowledge-sharing and networking.

2. Market intelligence, building an understanding of market opportunities and impact.

3. Advocacy, for building enabling policy, regulations and investment.

4. Creating and promoting industry standards and guidelines.

As an association we're constantly reflecting on our goals and the progress we're making towards them. Here's how we did in 2018:

Knowledge-sharing and networking

We kicked off the year with the Global Off-Grid Solar Forum and Expo in Hong Kong, convening more than 700 industry leaders, investors, policy-makers and other stakeholders from 65 countries. We discussed a wide range of topics e.g. the role of public and commercial finance, impact measurement, the role of governments and whether PAYGo will retain its role as the leading consumer financing mechanism. These themes were also explored in a report launched in Hong Kong – **the Off-Grid Solar Market Trends Report** – commissioned by Lighting Global with major input from GOGLA. The biennial publication shows that investment in the sector doubled annually from 2012–2016, with companies raising approximately USD 922 million in a five year period between 2012 and 2017. Our members also used the event as a platform to launch new products and **announce \$75m of new investment**.

In February, we organized a Data Consultation Day in Nairobi, Kenya. This was an interactive knowledge-sharing event which involved key industry players discussing their data needs and priorities. All participants highlighted how such workshops should be more frequent, with different stakeholders as a way of sharing

knowledge of existing GOGLA resources and better understanding the needs of the members. Following the Data Consultation Day, we held a Data Services session during our AGM in Amsterdam in June. Lively brain-storming produced fresh ideas on what GOGLA should start doing and GOGLA's current activities in this area were roundly praised.

In April, as part of our work on e-waste, together with M-KOPA and development finance institute CDC, we hosted a workshop in Nairobi focused on the challenges and opportunities for improved e-waste management. It was a proactive step, bringing together key individuals, finding partnerships and identifying tangible projects to move the sector forward.

One of the key highlight events of the year within our policy work was the EAC Roadshow we ran alongside the Powering Opportunity report. Following the release of **Powering Opportunity**, we held three one day events in Kenya, Rwanda and Uganda. The events profiled significant research findings on economic activity, income generation and quality of life and called for more action on energy access via off-grid solutions. The roadshow was attended by over 130 sector stakeholders, including representatives from energy ministries, standards bureaus, investors and the donor community.

As part of our partnership with GIZ to implement a part of the EU-Africa Renewables Cooperation Program (RECP), we held a series of events across the year including an academy organized with the African Management Institute, a symposium on the role of public funds in the off-grid solar sector, and the data consultation day. Another knowledge-sharing element to the RECP program was the Zambia Off-Grid Investor Forum in June, which we organized with the Alliance for Rural Electrification, and supported by Zambia's Rural Electrification Authority. The event brought together over 240 people from 40 countries, made up of active members of our industry including financiers, entrepreneurs, and international development partners.

In 2018 we hosted three government and industry 'dialogue days'. The final of these in November was our most successful: the full-day 'Community of Champions' event in Kigali. The event was designed to offer a high-level and on-going exchange between governments, the private sector and development partners on how to work together towards achieving universal energy access in

Africa. Over 53 participants attended, including government representatives from 10 countries across the continent as well as representatives of the off-grid solar sector and international development community. The event was very successful. Attendees told us they learned more about the sector and they wanted to remain engaged with the 'Community of Champions' in the future.

On tech innovation, we ran a **webinar** with our partner and member BFA, on how unbundling of the PAYGo business model is driving market expansion. 'Unbundling' is the separation of a product or service into individual offerings not previously viable to sell as single parts or services. The webinar included a panel discussion with Angaza and PEG Africa to explore how specialization in the value chain is creating new opportunities. The core enabling PAYGo technologies are unbundling into standalone offerings. Hardware and software specialists are partnering with focused distributors in a new wave of PAYGo ventures. The webinar marked the kick-off of GOGLA's Technology Innovation



Our activities and services

series. These webinars, blogs and events designed to explore technology and business innovation in the off-grid solar sector. With our Hong Kong conference kicking off the year, we wanted to conclude the year with another high-profile event: Unlocking Solar Capital Africa co-organized with Solarplaza. As in previous years, Unlocking Solar Capital Africa was a huge success for us, providing a forum for high-level exchange and intense networking between the private sector and investors from across the globe. The event received encouraging feedback, with over two-thirds of participants stating that they believe they will close a business deal as a result of their participation. Industry leaders and investors also led stimulating conversations on the various financing needs of the sector.

Building an understanding of market opportunities and impact

In 2018 we established a specific data division, as a focused new team within GOGLA. This team was strengthened at the end of the year with the addition of Mariana Daykova as Data Manager. Mariana will help to strategically design, engage and fundraise for data-related projects. Our research and metrics activities were further boosted in October by the addition of Sjef Ketelaars to the team, who joined as Research Assistant.

This expansion is good news for GOGLA members who will benefit from the team's work.

As part of our main market intelligence activity, 2018 saw us complete two semi-annual data collection rounds on the off-grid solar lighting product market. We gathered and reported sales data from almost 70 companies for the periods of July-December 2017 and January-June 2018. We also developed a sound methodology to reliably segment sales volumes into cash versus PAYGo. This enabled us to measure the total market

value of the units sold through PAYGo. This major amendment gave the Global Off-Grid Solar Market Report of October 2018 a more accurate reflection of the growth and development of the sector.

During the Global Off-Grid Solar Forum & Expo in January, we launched the **GOGLA Bridge** – a database of support services. This vital new database includes information on investors and grants, crowdfunding opportunities and award programs. The GOGLA Bridge will accelerate the growth of our members as well as the broader sector, and was realized thanks to support from the Africa-EU Renewable Energy Cooperation Programme (RECP). The number of entries has grown organically over time, and the GOGLA Bridge has rapidly become one of the most visited sections of our website.

In July, we released a major new report 'Powering Opportunity'. The report is the culmination of extensive data collection into the socioeconomic impacts of off-grid solar. The research was funded by the UK Department for International Development (DFID), conducted by Altai Consulting and supported by seven GOGLA Members: BBOX, d.light, Fenix, M-KOPA, Mobisol, Solar Works! and Zola Electric. The insights highlighted the transformational power and positive impact of solar home systems on economic activity, income generation and quality of life. The findings were shared in a lively communications and outreach campaign to make more people aware of the benefits of the off-grid solar industry. The 'Powering Opportunity' impact data was also used, among many other sources, by GOGLA's Impact Working Group in its revision and expansion of the **GOGLA 'Standardized Impact Metrics for the Off-Grid Solar Sector'**.

Over the summer, we initiated another key expansion to our market intelligence work, in partnership with the Efficiency for Access coalition,

funded by DFID and managed by the UK's Energy Saving Trust and CLASP. The aim is to expand the current data collection and reporting process to include the energy efficient appliances designed to provide televisions, fans, refrigeration and water pumping services for off-grid use. In September, we consulted with companies and experts to find out how best to capture and segment the data, since the willingness of companies to share the data is inconsistent. The appliances reporting will be incorporated in the data collection for the second half of 2018, starting in early 2019.

Advocacy, for building enabling policy, regulations and investment

After securing funding from GIZ, we started a major study into employment creation in the off-grid sector in August. We began examining the number and nature of employment created, and macro-economic benefits in key markets. The first policy note on this was released in November and the remaining two are due for release in early 2019.

In the autumn, we published an updated and revised edition of the guidance note for governments on providing energy access through off-grid solar. The guide, published in both English and for the first time in French, was developed together with the joint World Bank/IFC Lighting Global Program, the U.S. Government-led Power Africa initiative, SEforAll; and the African Development Bank, and reflects these organizations' shared views on key policy and regulatory issues in the standalone, off-grid solar sector.

We closed the year by attending COP24. This was a clear sign of progress as the first time our sector was present at the international climate talks. As well as engaging with government representatives, we were able to truly be the voice of the sector on behalf of our members, most of whom were not present.

The team grew in 2018 and in June, Julie Cammell joined the team, replacing Johanna Galan as Program Manager following Johanna's promotion at the end of 2017 to GOGLA's Director of Policy.



Our activities and services

The year was not without its challenges. The introduction of e-waste levies into West Africa being a notable one. Our on-going efforts on VAT and duty exemptions in the EAC, where we continue to be proactive in negotiations, also proved difficult during the year. In Tanzania, a ban was put in place for the use of solar lanterns for fishing. This ban would have been extremely damaging to our sector but thanks to the work of the Tanzanian renewable energy association, TAREA, the disruptive legislation was overturned and the ban was lifted in early 2019.

On finance, the sector has seen both early successes and failures. The market has grown and responded fast. We've seen how second and third wave companies have struggled to meet their funding needs. The good news is that there are a host of dedicated specialized funds, an array of engaged strategic investors, and dynamic crowdfunding opportunities all bringing new ideas to the table which will help our sector to thrive.

Creating and promoting industry standards and guidelines

establishment of the **Consumer Protection Code**; the industry standard for the off-grid solar sector. The aim of this is to respect the rights of the consumer placing the consumer at the forefront of our industry. We worked closely with our members – companies and investors – to identify a set of principles that represent the minimum standards of practice that consumers should expect. Since its establishment, 13 companies have made a Commitment to this set of principles and 7 other organizations have made an endorsement. You can read more about our **Consumer Protection Code** [here](#).

During the year we've also advanced our work on electronic waste, or 'e-waste,' an area of the market which is new and complex. We believe that now is the time to address this global issue and how it impacts our sector. Hosting a lively day of

discussion was a good starting point. In December, we launched the e-waste Working Group and Toolkit with the aim of helping our members improve their e-waste operations through sharing good practice on management of e-waste, and by creating a knowledge hub with tools, studies and a catalogue of service providers.

On our quality assurance work, in October we represented our sector at the general meeting of the International Electrotechnical Commission (IEC) in Busan, South Korea. We led a consultation with our industry peers on product quality standards. We continue to engage with national governments and sector support programs to advise on ways they can ensure good product quality in the market.

In 2018, we also worked with GIZ on financial performance measurement. This was supported by the GIZ Financial Systems Development team, building on previous work that GOGLA had done, with the World Bank, on a key performance indicator (KPI) framework for the off-grid PAYGo sector. The project gave crucial insights on how our members view performance measurement and gave us a solid basis on which to build the PAYGo PERFORM partnership with Lighting Global and CGAP. PAYGo PERFORM will focus on revising the current KPI framework to strengthen and refine it, eventually helping to build a benchmarking system for the sector.



GOGLA budget

A big step forward

During 2018, the fourth year since GOGLA became an Association under Dutch law, our income grew significantly by 1 million euros resulting in a total budget of 2.6 million euro. Our members, new and existing project funders and all of our sponsors & partners who contributed to our Global Off-Grid Solar Forum & Expo in Hong Kong, beginning of 2018, made this possible.

Income

GOGLA's main funding sources are membership fees; core funding grants; earmarked funding grants ("project funding"); and other income such as positive results from events.

- The growth of the number of GOGLA members to 142 at the end of 2018, combined with revised fees as agreed in the AGM 2017, led to 36% more income from membership fees. Relative to the overall budget, it was 11% of the total income of 2018.
- Core funding remained available with continued support from Shell Foundation and USAID but overall declined in relative contribution from 49% in 2017 to 24% in 2018.
- Earmarked funding increased considerably, due to successful fundraising which started in 2017; the relative share growing from 35% to 36%. This funding helped GOGLA to implement and start a number of key projects, for example research on socio-economic impacts and job creation; developing consumer protection principles; or developing the 'GOGLA Bridge' database.
- Other funding included mostly income generated by events. Income was generated by the Hong Kong GOGSFE event (though booking a small deficit after charging all team hours for preparation) and the Unlocking Solar Capital event.

Expenses

The costs for 2018 developed in line with the increase in income to build our staff capacity, add work stations and invest in additional IT for the team. The main cost item remained staffing costs; the team grew from 16 FTE at the beginning of the year towards 20 FTE at the end of 2018. The relative share of salaries declined a bit to 6%, as project expenses grew more. We also invested in a new communication strategy and updates of the GOGLA website.

Financial management

The financial management capacity within the GOGLA team increased significantly during 2018. Halfway during 2018 GOGLA also obtained support from a financial consultant who reviewed our internal procedures and financial management, reporting back to the GOGLA management team and Board of Directors. This led to various suggestions to strengthen procedures, particularly in view of the growing portfolio of projects, which are being implemented. During 2018, besides the audit of the 2017 annual financial report, GOGLA also successfully underwent audits on three financial project reports.

Looking ahead

For 2019, GOGLA has a secured budget agreed with the BoD which foresees further growth of income and expenses to EUR 3.3 million, thus expecting some further growth but at a reduced rate compared to the last years. For 2020 and onwards, new fundraising activities have kicked off to sustain the current level of operations plus moderate growth. In the medium to long-term, we will need to continue to grow membership fee income and sponsorship income from events. We will also need to explore other possible routes for generating income, such as marketing our market data collection.

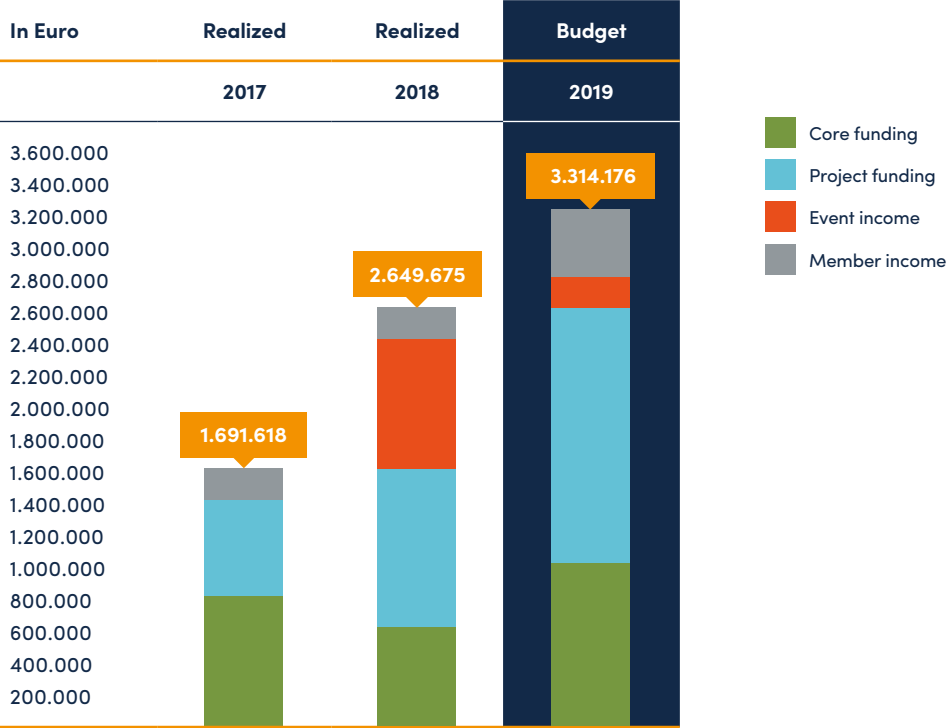
Financials: some headlines

Results

In Euro	Annual Report	Annual Report	Annual Report	Annual Report	Budget
	2018	2017	2016	2015	2019
Total Income	2.649.675	€ 1.691.618	€ 1.376.209	€ 692.373	€ 3.314.176
Member income	€ 299.495	€ 205.992	€ 128.702		€ 370.000
Core funding	€ 632.635	€ 837.059	€ 576.071		€ 1.029.139
Project funding	€ 959.642	€ 599.786	€ 626.412		€ 1.696.198
Events and other income	€ 757.903	€ 48.781	€ 45.024		€ 218.839
Expenses	€ 2.689.148	€ 1.682.928	€ 1.367.900	€ 626.763	€ 3.313.928
Results before financial income	€ (39.473)	€ 8.690	€ 8.309	€ 65.610	€ 248
Financial income	€ 705	€ (46.680)	€ (11.957)	€ 18.130	€ -
Result before tax	€ (38.768)	€ (37.990)	€ (3.648)	€ 83.740	€ 248
Taxes CIT	€ -	€ 17.888	€ (20.571)	€ -	€ -
Result after taxes	€ (38.768)	€ (20.102)	€ (24.219)	€ 83.740	€ 248

Full details are provided in the Audited Annual Accounts 2018 (January – December) and can be requested at GOGLA office in Utrecht, The Netherlands.
Full Budget 2019 and mulit year budget can be requested at GOGLA office in Utrecht, The Netherlands.

Budget development



GOGLA Board of Directors 2018:

- Harry Verhaar (President), Philips Lighting/Signify
- Radhika Thakkar (Vice President), Greenlight Planet
- Andreas Spiess, SOLARKIOSK
- Joshua Pierce, ZOLA Electric
- Philippe Cabus, Total SA
- Ti el Attar, NIWA
- Wolfgang Gregor (Treasurer), an individual member

The next election for a new GOGLA Board of Directors will take place in June 2019, during our AGM in Amsterdam.

GOGLA Advisory Board 2018:

- Ilana Cohen, GSMA
- Jim Rogers, Duke Energy, before his sad passing at the end of the year
- Katrina Pielli, USAID
- Richard Gomes, Shell Foundation
- Russell Sturm, IFC
- Walter Kipruto, GIZ Kenya

GOGLA's Finance Committee comprises two GOGLA member representatives:

- Roger Brugger, BBOX
- Lorraine Hammond, SolarAid

GOGLA's Secretariat team continued to grow in 2018, and by the end of the year our team included 17 people on GOGLA's payroll (circa 16 full-time equivalents), and six in a long-term consultancy role (circa four full-time equivalents). Together they are representing 13 different nationalities.

We welcomed nine new additions to our team over the year. They were; Marily Kleijn as Office Manager and HR assistant, Serra Paixão as Events and Project Assistant, Julie Cammell as Program Manager for Policy and Regulatory Environment, Charlotte Webster as Senior Communications Adviser, Abdel El Amrani as Assistant Controller within the finance team, Garick Lee as a consultant on Quality Assurance and Technological Innovation, Sjeff Ketelaars as Research and Policy Assistant, Mariana Daykova as Data and Grégory Durand as Director of Operations

They joined Koen Peters (Executive Director), Johanna Galan (Policy Director), Carine Verveld (Financial Manager), Drew Corbyn (Program Manager, Quality and Consumer Protection), Laura Sundblad (Program Manager, Access to Finance), Viraj Gada (India Regional Representative), Patrick Tonui (East Africa Regional Representative), Susie Wheeldon (Research Advisor), Silvia Francioso (Data Analyst), Eveline Jansen (Member Relations and Events Officer), Sascha Brandt (Communication Officer) and Jing Pan (Communication and Research Assistant).



Our strategy through to 2020

GOGLA's strategy was addressed and reviewed in 2017. We are still operating in line with this strategy, with buy-in from our members, the Board and staff. Our strategic focus remains as follows:

1

To put member value first and prioritize sector activities based on our member needs

We are proud to represent our members. We prioritize activity and sector support work based on the needs of the industry. We work collaboratively with our members. We engage them in our work plan, we ask them where they need support and take the lead in identifying future market barriers ourselves. The GOGLA Working Groups are a central vehicle for involving and consulting with our members, but we also hold regular webinars, workshops and global events allowing for face-to-face opportunities.

2

To be the voice of the industry

We're increasingly accepted as the voice of the off-grid solar industry. This allows us to act as a central sounding board and a supportive touchstone for the sector. We are building our profile and strengthening both our voice and our position. We continue to represent the industry at events around the globe, produce world-class reports, white papers and guidance notes for Governments. We also invest heavily in vital lobbying work and take a leading role in harmonizing standards on quality and consumer protection. We promote holistic best practice, from business conduct to transparency.

3

To make pro-active communication and increase visibility outside the sector

To be successful in helping the sector achieve its goals and reach universal energy access by 2030, we need to amplify our voice and make ourselves heard in the mainstream. We are prioritizing influential sectors and aim to make closer links and partnerships with the private sector.

4

To build representation within key markets

We work with national renewable energy associations and development partners on the ground around the world. We are also developing our own regional representation in selected priority market regions. This will help us establish direct links with fiscal and tariff regulators in a coordinated way, with consistent messages.

5

To work towards improved financial independence

In 2017, the GOGLA Board of Directors and the Advisory Board agreed that working towards continued and growing impact on the market, was higher priority for the sector and our own resources than striving towards financial independence. As a consequence, the share of our income coming from grant and donor funding remains high, at around 80%. We still need to grow our own income streams so that over time, as the industry matures, we will be able to fund ourselves sustainably. In 2018 our income from membership fees continued to grow. We saw new members join us, while 2018 was also the first year that increased fees, agreed with members at the AGM in 2017, were applied. We also grew our income from event sponsorship and exhibition and participation fees.

6

A broadened GOGLA technology focus

Since 2017, we have represented a broader range of technologies and members. Beyond solar lighting and solar household electrification, we have increased our position as the 'off-grid solar energy industry association' representing 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. In 2018, GOGLA welcomed three new members who manufacture or distribute products beyond lighting. We look forward to welcoming more companies from the broader sector in the future to help us go further, faster, together.

Keep up-to-date
with GOGLA's news,
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at gogla.org/newsletter

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The Voice of the **Off-Grid Solar Energy** Industry