



**LIGHTINGEUROPE**

# Voice of the Lighting Industry in Europe

2016 ANNUAL REPORT





## The paradigm shift in lighting opens exciting opportunities for the European lighting industry

**Jan Denneman**

President 2015 - 2017

A paradigm shift is taking place in the lighting market, moving beyond energy efficiency towards quality of light and Human Centric Lighting. This requires a change from “cost of ownership” thinking towards “**benefit of use**” considerations. Hardware and products will release their full benefits only with software help and system thinking.

With the implementation of LightingEurope’s **Strategy Roadmap 2025**, we are focussing on the strategic growth drivers for the industry that will benefit the European users and the environment: **LEDification, Intelligent Lighting Systems, Human Centric Lighting and Circular Economy**.

LEDs enable very energy efficient solutions, while at the same time, the technology facilitates an improvement in the **quality of light**. One role of LightingEurope is to assure that policy makers do not only see the lighting industry as a key generator of energy savings but to secure enough regulatory room for manoeuvre to allow lighting users to benefit fully from this new technology, not purely from the energy efficiency aspect.

The introduction of LED technology is changing the lighting industry from “analogue” to “digital” particularly on the controls and sensors side. As buildings become ‘smarter’ and need to operate as connected ecosystems, lighting will become the backbone of an intelligent building. The European lighting industry aims to **grow the market by stimulating intelligence, controls, sensors and dimming**. We must ensure that the users of lighting installations benefit from better lighting which is enabled by LEDs and Intelligent Lighting Systems.

Light can improve cognitive performance, energize, increase alertness or ease relaxation. It can improve mood, as well as stabilize the sleep-wake cycle of people. **Human Centric Lighting** enhances “Quality of Life” such as better health, well-being and performance of humans by combining the visual, biological and emotional benefits of light. LightingEurope will cooperate with relevant European DGs, agencies and other stakeholders to stimulate the implementation of Human Centric Lighting.

The lighting industry has a great track record in prolonging the lifetime of products, in collection and recycling and in the reduction of hazardous substances. Our ambition is to further **minimize our ecological footprint** and to shape the Circular Economy policy area with elements like refurbish, remanufacture, reuse and re-distribution.

The ambitions of LightingEurope are tangible for the coming years. I am very confident that the new team and experts from our members will make them a reality.

## From Strategy to prudent and stringent Implementation

**Diederik de  
Stoppelaar**  
Secretary General

The launch of the Strategic Roadmap 2025 in March 2016 gave the market and EU institutions a clear indication about the focus topics of the European lighting industry: Intelligent Lighting Systems, Circular Economy, Human Centric Lighting and LEDification.

In various key-note speeches, for example at the LED professional Symposium or LuxLive, I elaborated on the strategic outlook of LightingEurope.

In 2016, we also acted strongly in a range of regulatory developments, such as

- ◆ the Commission preparatory **study Lot 37 on Lighting Systems**. We achieved that the Lighting System Design Process has been included
- ◆ the adoption of the **Ecodesign Workplan** where LightingEurope supported the EU Commission with a **practical regulation that can be surveyed** and will achieve energy saving objectives
- ◆ the preliminary draft of a **“Single Lighting Regulation”** that will replace the current 3 regulations, and in which working group experts had a positive influence

In 2016 LightingEurope secured **‘Human Centric Lighting’** as a defined terminology with a common understanding. As work package leader for this topic in the **SSL-erate project**, academic research was compiled, a new metrics for lighting design developed and the success of related lighting installations widely disseminated. The stakeholder network is now defined and we have built the foundation to approach various EU institutions and place Human Centric Lighting as a benefit for European citizens and growth driver for the lighting industry. LightingEurope has shared its expertise with position papers on flicker and stroboscopic effects or **FAQ on alleged LED related health issues**.

In this report, you see the new faces of the team that are eager to guide the new organization in the implementation of the Strategic Roadmap in 2017.

I will leave LightingEurope at end of March and thank all the supporters and followers of LightingEurope. I have appreciated the critical voices and enjoyed the constructive dialogue we had. Hopefully, I will continue to meet many of you at lighting events around the globe.



# Achievements 2016



## Energy

### ENER LOT 37 study on lighting systems

- Contributed to ENER Lot 37 study; to be published soon by DG ENER
- Assigned 'Lighting System Design Process' task to CEN/TC 169

### EPBD (Energy performance of Buildings Directive)

- Published position paper addressing lighting systems as Technical Building System and active lobbying towards the Commission
- Commission's proposal for a revised EPBD now includes system requirements for in-built lighting as requested by LightingEurope

### GPP (Green Public Procurement) for Street Lighting

- Timely inputs to VITO technical report + criteria proposal  
→ LightingEurope as key provider of data and input

### Single Lighting Regulation

- Industry alignment and active lobbying towards the European Commission and Member States with concrete recommendations



## Environment

### Mercury/Minamata regulation

- Position paper on Commission's legislative proposal

### WTO Environmental Goods Agreement

- Position paper to exclude LED luminaires from the agreement



## Human Centric Lighting

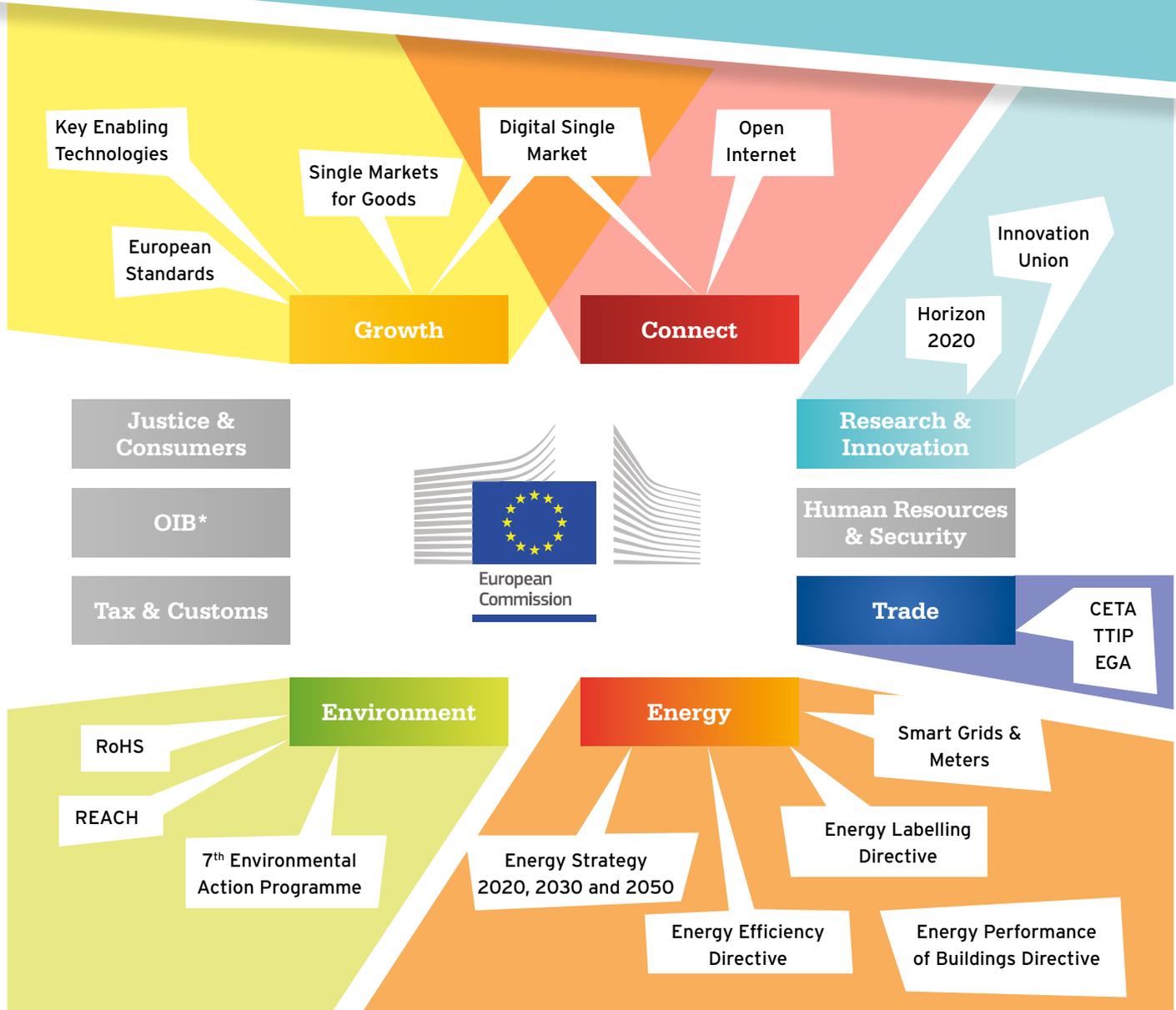
- 2 position papers on quality of lighting and flicker and stroboscopic effect
- Successful industry alignment on the understanding of Human Centric Lighting, creation of widely used infographic, virtual tour around companies with HCL demonstrations during Light+Building, Frankfurt
- Strongly appreciated participation in EU sponsored FP7 SSL-erate project, leading work packages Human Centric Lighting and Dissemination



## Standardization

- LightingEurope joined the SMARRT (Standards Market Relevance Roundtable) which is a direct platform to discuss standardization issues between the industry and the Commission

# EU Policy framework



\* Office for Infrastructure and Logistics in Brussels

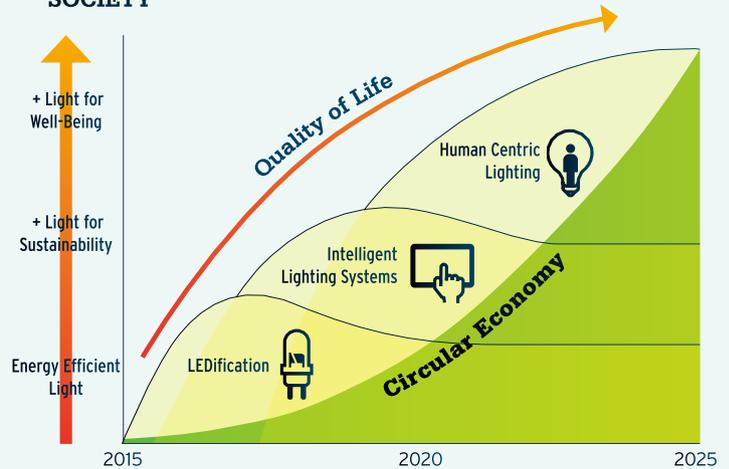
# Strategic Roadmap

“Light is life!” From the earliest stages of life on earth, life has been based on light. For over 100 years, electric light has made it possible to learn, work and live in almost any place and at any time on earth. Over recent decades, a lot of effort has gone into reducing the energy consumed to make this possible.

In the coming decade, the development of new lighting systems will enable the properties of natural lighting to increase the quality of life in many daily situations. This will be the case in education, in leisure time, in healthcare, in elderly homes or in business.

New system capabilities will adapt lighting conditions to suit the user thus creating high value to society. Efficiency will go up, illness rates down, recovery will be faster, learning will be easier, but more importantly wellbeing and perceived quality of life will improve!

## Growth of VALUE of LIGHT to SOCIETY



The Strategic Roadmap 2025 of LightingEurope demonstrates the increasing growth in the value of light to society.

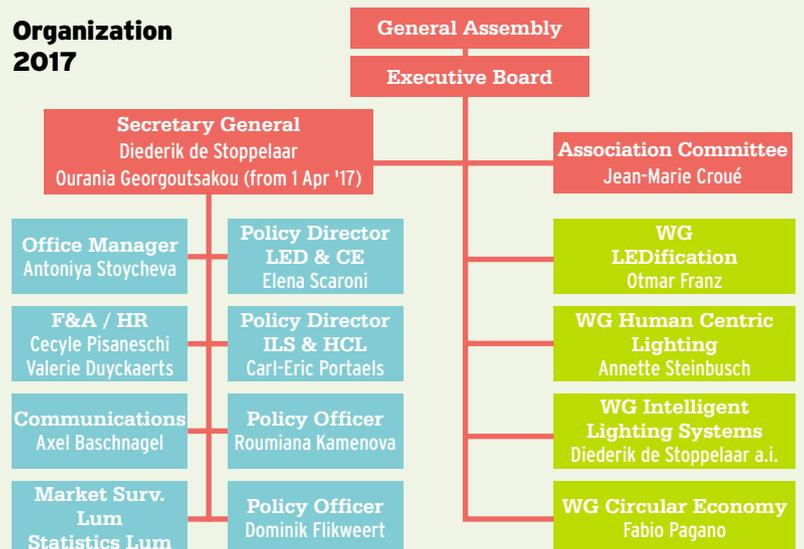
In this process, energy efficiency is supplemented with light for well-being and with light for sustainability.

The European lighting industry is aiming, together with European legislators, for the growth of the European lighting market through more intelligent lighting, increased renovation rates, Human Centric Lighting and by Circular Economy thinking.

A result will be an increased number of jobs in Europe.

In the process of implementing the Strategic Roadmap 2025, the organization of LightingEurope is changing in January 2017 and tangible ambitions for the new working groups have been defined.

## Organization 2017



# LightingEurope

## Focus Areas

### Intelligent Lighting Systems

LightingEurope will be focusing on growing the market by stimulating more intelligence, more controls, more sensors and more dimming with the following objectives:

- the lighting industry must remain in the driving seat on the systems side rather than being forced into a component supplier-only role.
- the users of lighting installations will benefit from better lighting which is enabled by LEDs and Intelligent Lighting Systems.
- Designers of lighting systems should provide controls to ensure that lighting quality is optimised. This lighting control should have well defined interfaces with higher level systems like building management systems and smart city networks.

### Circular Economy

The ambition of LightingEurope is to further minimize the ecological footprint of the lighting industry by

- Reaching out to the relevant DGs of the European Commission and establishing strategic partnership with other stakeholders in order to define the next steps in this policy area.
- Including refurbish, remanufacture, reuse and redistribution as elements of the Circular Economy.
- Increasing the LED lighting systems usage time at the customer site.
- Promoting reparability, upgradeability, serviceability, durability and recycling.

### Human Centric Lighting

This is regarded as the primary driver for LightingEurope and requires

- Stimulating the awareness of the impact of Human Centric Lighting on the well-being of all users during their daily activities.
- Shifting from pure “energy efficiency thinking” towards “benefit of use thinking”. Offering light that is tuned towards the individual needs of users.
- Cooperating with selected European DGs, agencies and other stakeholders to stimulate implementation of Human Centric Lighting to the benefit of European citizens, society and industry.

### LEDification

Several crucial activities that are currently already on the agenda of LightingEurope will be pursued in 2017 and beyond. These include:

- Contributing to the Single Lighting Regulation, replacing 3 existing regulations
- Setting energy use requirements for lighting systems, based on the currently running ENER Lot 37 project study
- Amending the Energy Performance of Buildings Directive (EPBD).

# Factual Numbers

LightingEurope office:

**2703**

COFFEE CAPSULES



**412**

TEABAGS



WATER (LITRE)

**803**

**929**

SANDWICHES



**4212**

COOKIES



CONFERENCE CALLS:

**73**

FACE-TO-FACE GROUP MEETINGS

**135**

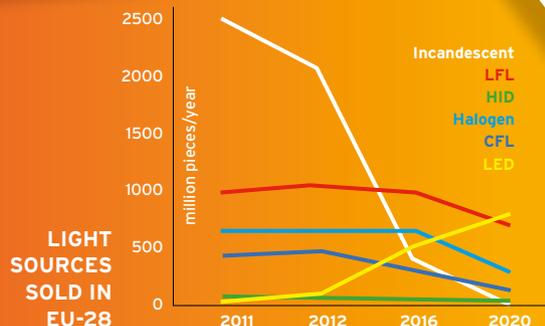
OUTSIDE BRUSSELS TRAVELS:

**118**

→ PLANE / TRAIN

European lighting market:

PEOPLE SPEND  
**90%**  
OF THEIR LIFE IN BUILDINGS



HUMAN CENTRIC LIGHTING INDUSTRY 2020:  
**1,4 billion €**  
**10000 new jobs**



PRODUCTIVITY INCREASE OF  
**+4,5%**  
WITH HUMAN CENTRIC LIGHTING

SAVING POTENTIAL

- ◆ From 60W incandescent to 6W LED retrofit (134 lm/W) we will save **90% in 2018** with current regulations compared to the 2009 situation
- ◆ Potential future product regulation (134→200lm/W) will save **extra 6% (2W)**, which is less significant

POPULATION IN EU IN 2020 WILL BE  
**41% >50 YEARS**  
212 MILLION OUT OF 514 MILLION PEOPLE



LED BASED LIGHTING FIXTURE MARKET 2016:

**9,6 billion €**

Global lighting market:



SMART LIGHTING MARKET 2025:  
**46,1 billion €**

GLOBAL STREET LIGHT 2025:  
**339 million UNITS**



STREET LIGHTING - SHARE OF LED 2018:

**65%**



# LightingEurope Team



**Diederik de  
Stoppelaar**  
Secretary General



**Elena  
Scaroni**  
Policy Director



**Antoniya  
Stoycheva**  
Office Manager



**Axel  
Baschnagel**  
Communication  
Consultant



**Roumiana  
Kamenova**  
Policy Officer



**Carl-Eric  
Portaels**  
Policy Director



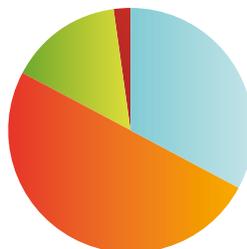
**Dominik  
Flikweert**  
Policy Officer



## Financials actual and planned

### 2016

<b>INCOME</b>	<b>1 216 006 €</b>
Staffing costs	398 719 €
External costs	607 715 €
Working Groups, projects and meetings	180 376 €
<b>COST</b>	<b>1 186 811 €</b>
Reserves	29 195 €



**33%**

Staffing costs

**50%**

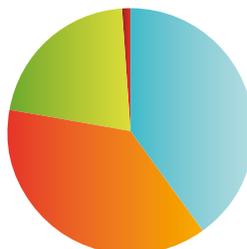
External costs

**15%**

Working Groups,  
projects, meetings

### 2017

<b>INCOME</b>	<b>1 134 650 €</b>
Staffing costs	454 731 €
External costs	435 043 €
Working Groups, projects and meetings	244 200 €
<b>COST</b>	<b>1 133 975 €</b>
Reserves	676 €



**40%**

Staffing costs

**38%**

External costs

**21%**

Working Groups,  
projects, meetings

“ We value LightingEurope as the No.1 lighting association in Europe and advocating industry positions within Europe’s political arena. Working together with the EU-Commission on topics such as the Single Lighting Regulation, materials regulations and general trade- and custom tariff issues is highly relevant for our company. The implementation of the Strategic Roadmap 2025 will help us to take correct business decisions. As a member of the Executive Board I gladly contribute to LightingEurope working on the important topics for the future of the industry and continuing to deliver significant benefits to its members.

Frank Hohn,  
Vice President, Head of Governmental Affairs,  
OSRAM Licht AG



## Executive Board 2016

The European lighting industry is determined to lift lighting beyond the level of energy efficiency and truly increase the value of light for society.

The Executive Board has agreed to set priorities on Intelligent Lighting Systems, Circular Economy, Human Centric Lighting as well as on LEDification. The quality of lighting with benefit for the user must be on top of our minds in shaping future regulations.

The new organization reflects a streamlined structure and objectives have already been defined for the working groups chairs. We therefore know the direction in which LightingEurope will move in the Brussels arena for the coming years.

We would like to thank our departing Secretary General Diederik de Stoppelaar for the tremendous work for LightingEurope in the past three years. He was successful in developing and implementing the Strategy Roadmap 2025 and in reshaping the association on personnel and finances. Diederik created a strongly international organization with an impactful leverage into the countries.



# Our Members and Partner Associations 2016



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*LightingEurope has developed into an impactful association in the Brussels arena and reaches out Europe-wide via its national lighting association members. As Chair of the Association Committee I am very pleased to contribute to the dialogue and alignment between lighting associations. Thanks to the Strategic Roadmap 2025 and the drive and focus of the LightingEurope team, we will have a moving agenda with clearly defined targets.*

Jean-Marie Croué  
Délégué Général, GIL,  
Syndicat du Luminaire



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**LIGHTINGEUROPE**  
THE VOICE OF THE LIGHTING INDUSTRY

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*We welcome the strengthened dialogue between our associations in 2016 and we look forward to a continued cooperation in 2017. We believe our mutual interest is to share expertise on technical and regulatory issues of common importance, especially on Human Centric Lighting. The IALD and LightingEurope agree on the fundamental motto: “we need the right light at the right time and the right place.”*

Marsha L. Turner,  
Chief Executive Officer,  
International Association Of  
Lighting Designers (IALD)



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