



LIGHTINGEUROPE



The Voice of the Lighting Industry

2017 ANNUAL REPORT





Peter Hunt
President 2017 - 2019

Progress in bringing value of lighting to society

Since LightingEurope launched its strategy for growth in 2016, we have seen considerable progress in our aims to bring added value to society beyond energy efficiency through the delivery of intelligent lighting systems and a quality lit environment which takes account of the human needs beyond vision to support our biological processes.

2017 saw our first event in the European Parliament in Brussels dedicated to Human Centric Lighting held in partnership with the International Association of Lighting Designers (IALD), the aim being to encourage regulators to consider the human benefits of light. This event signalled two major steps in our strategic aims. Firstly, to work more closely with partner organisations to support our common goals and secondly to bring Human Centric Lighting to the forefront of peoples' minds when designing or refurbishing the built environment.

Our Working Groups continue to be the backbone of our organisation and we recently realigned these groups with our strategic roadmap while introducing external speakers and topical presentations from regulators and other groups further increasing our influence.

Looking towards 2018, we will focus on promoting the benefits of quality lighting and supporting the industry to pursue the growth opportunities of quality lighting, intelligent systems and circular economy models.

As my first year as President draws to a close, I am genuinely excited by the pace of change in LightingEurope while humbled by the sheer hard work of our working groups and determination of our staff in achieving our goals.

Navigating Europe's regulatory landscape and creating growth

In 2017 the regulatory environment for Europe's lighting industry has continued to evolve, presenting both new opportunities as well as new obligations. LightingEurope's mission is to liaise with European decision-makers to shape a positive environment that stimulates innovation and growth for Europe's lighting industry.

As LEDification continues, the performance requirements for light sources proposed in the draft Single Lighting Regulation will impact what conventional lamps, LEDs and luminaires can be sold in the EU. Energy efficiency is increasingly being considered in the wider context of smart connected devices and wellbeing of the user. The framework conditions for deriving value from Intelligent Lighting Systems are being shaped by new EU data protection and cybersecurity rules. A common understanding of Human Centric Lighting has developed among the industry, efforts are now shifting to demonstrating the difference that the right lighting can make. LightingEurope members are exploring the opportunities offered by the Circular Economy, looking at the potential of serviceable luminaires and the requirements that would need to be addressed for a shift towards increased serviceability.

I have thoroughly enjoyed my first months with LightingEurope and have been impressed by the complexity and the potential of what those not from the industry take for granted: lighting. I would like to thank the members for their warm welcome and their engagement in our activities. Together with the team of enthusiastic and committed professionals in the Secretariat we will continue to spread the word about what lighting can do for individuals and for Europe.



**Ourania
Georgoutsakou**

Secretary General

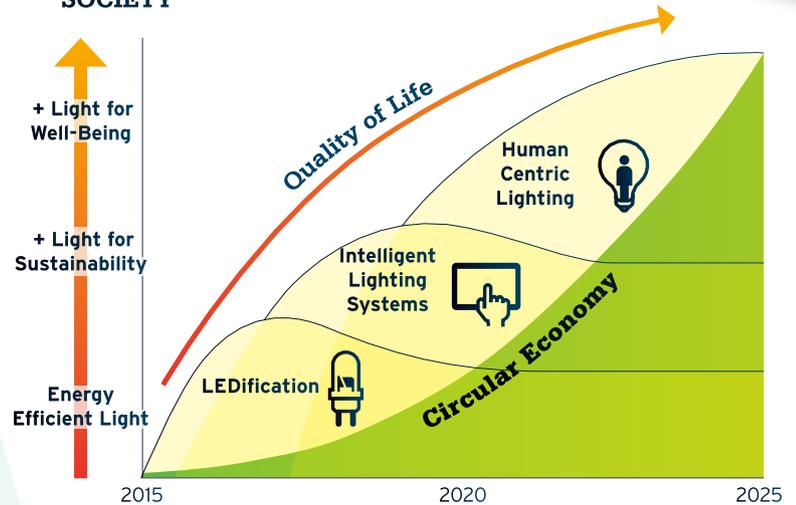
Strategic Roadmap

The Strategic Roadmap 2025 of LightingEurope was published in March 2016. It demonstrates the increasing growth in the value of light to society.

Over recent decades, a lot of effort has gone into reducing the energy consumed by lighting. With the currently ongoing transition, the development of new lighting systems enables properties from natural lighting to increase the quality of life in many daily indoor situations. Examples can be found in education, healthcare, elderly homes or in business.

New system capabilities will adapt lighting conditions to suit the user thus creating high value to society. As a result, 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



LightingEurope Team



Ourania Georgoutsakou
Secretary General



Elena Scaroni
Policy Director



Roumiana Kamenova
Policy Officer



Dominik Flikweert
Policy Officer



Antoniya Stoycheva
Office Manager



Axel Baschnagel
Communication Consultant

Achievements 2017



Circular Economy

Exploring serviceable luminaires

The Circular Economy remains at the heart of EU policies and rules and LightingEurope's ambition is to lead in this transition for the lighting industry, providing members with the tools and information they need to evaluate and pursue the opportunities for their products and technologies.

LightingEurope members published a White Paper and are reviewing the potential of serviceable luminaires in terms of:

- Benefits to consumers and to the environment
- New business models and opportunities for the sector
- Framework conditions for ensuring a smooth transition, e.g safety, clear roles across the value chain during the product lifetime

WEEE definition of lighting products agreed

As LightingEurope, we have decided on a set of definitions for lighting products (lamps, luminaires, LED modules) for the purpose of the EU WEEE legislation. These definitions support maximum efficiency in the collection and recycling process for lighting products and a harmonised interpretation of the rules across all EU member states. LightingEurope works closely with EucoLight, representing the lighting WEEE compliance schemes, to support the lighting industry to comply with waste recovery and recycling rules.

Minamata - Mercury regulation and RoHS exemptions

All LightingEurope requests have been included in the final text of the EU Mercury Regulation, that allows the export of mercury-based lighting products manufactured in Europe.

LightingEurope has provided data to support its application to renew the exemptions for the use of mercury under RoHS, and ensure that mercury-containing lighting products can continue to be manufactured and sold in Europe beyond 2018 and until substitution is possible.



Intelligent Lighting Systems

Lighting systems - the current market and legislative environment

LightingEurope organised a seminar on Intelligent Lighting Systems. A diverse range of speakers presented on Smart Cities, the EU perspective on IoT, the General Data Protection (GDPR) and ePrivacy Regulations and opportunities with Building Automation.

LightingEurope is developing its strategic vision in this focus area to provide direction for the lighting industry and facilitate the rollout of lighting technologies.



LEDification

The role of Lighting Systems in energy performance

The European Parliament supports the objective of LightingEurope that lighting systems should be taken into account when evaluating the Energy Performance of Buildings:

- Built-in indoor and outdoor lighting systems would become a Technical Building System
- LightingEurope experts contributed to the EU ENER LOT 37 study which showed that the maximum EU-28 total annual electricity savings for optimised lighting system designs with controls would be 20-29 TWh/year in 2030 *
- Lighting systems provide dynamic and tuneable light (dimming and boosting light intensity and tuning spectrum) enabling Human Centric Lighting

Shaping the new Ecodesign regulation and Energy Labelling delegated act on lighting

- LightingEurope is a key stakeholder in the ongoing legislative process on the Single Lighting Regulation and the Delegated Act on energy labelling (decisions are expected for Spring 2018)
- LightingEurope members have been sharing their expertise with DG Energy and the consultants to the Commission, as well as national authorities and other stakeholder groups in a series of meetings and communications



Human Centric Lighting

Healthy Buildings combine energy efficiency, well-being and performance of people

Light has been known for a long time to enable sight, safety and orientation. Science has shown however that light facilitates powerful non-visual effects on humans.

- LightingEurope created the term "Human Centric Lighting" in spring 2016 and gave guidance to the market with a definition and information material
- Partnership with IALD (lighting designers) and joint calls for the inclusion of Human Centric Lighting in the revised EPBD (Energy Performance of Buildings Directive)
- Infographic illustrating benefits of Healthy Buildings
- Luncheon Conference in the European Parliament hosted by Member of Parliament Peter Liese
- Meetings with officials of the European Commission and member state Permanent Representations

Addressing questions on LED lighting

Following a request from the European Commission, the Scientific Committee on Health, Environmental and Emerging Risks (SCHEER) reviewed recent evidence to assess potential risks to human health of Light Emitting Diodes (LEDs) emissions and published a preliminary opinion in July 2017. The Committee concluded that there is no evidence of direct adverse health effects from LEDs emission in normal use by the general healthy population. LightingEurope has contributed with its views and proposals during the consultation process. Experts from LightingEurope have also compiled a FAQ on LED lighting, including street lighting, and responded to questions from the market.

The FAQ are another example of the guiding role of LightingEurope for EU institutions and the lighting market.

LightingEurope in the Public

LightingEurope events in Brussels

European Lighting Summit

March 2017



Jan Denneman, President of LightingEurope until March 2017



Handover - from Diederik de Stoppelaar to Ourania Georgoutsakou

Intelligent Lighting Systems - Seminar

September 2017



Michael Ziegler, Programme Officer, European Commission, DG CONNECT, Photonics Unit



Luncheon Conference, European Parliament

Hosted by MEP Peter Liese

October 2017



MEP Peter Liese



MEP Peter Liese with Peter Hunt, President of LightingEurope

LightingEurope in the media



LEDs Magazine



Licht



LED professional Review

LightingEurope in social media



1000
FOLLOWERS

UP TO **20 000**
TWEET IMPRESSIONS
/MONTH



600
FOLLOWERS



UP TO **3000**
WEBSITE SESSIONS/
MONTH

LightingEurope presented at



Transforming Lighting,
Madrid, February 2017



EucoLight, Bratislava,
April 2017



Syndicat de l'éclairage,
France, June 2017



The Lighting Industry
Association, United
Kingdom, July 2017



Syndicat du luminaire,
France, September 2017



LED professional
Symposium, Bregenz,
September 2017

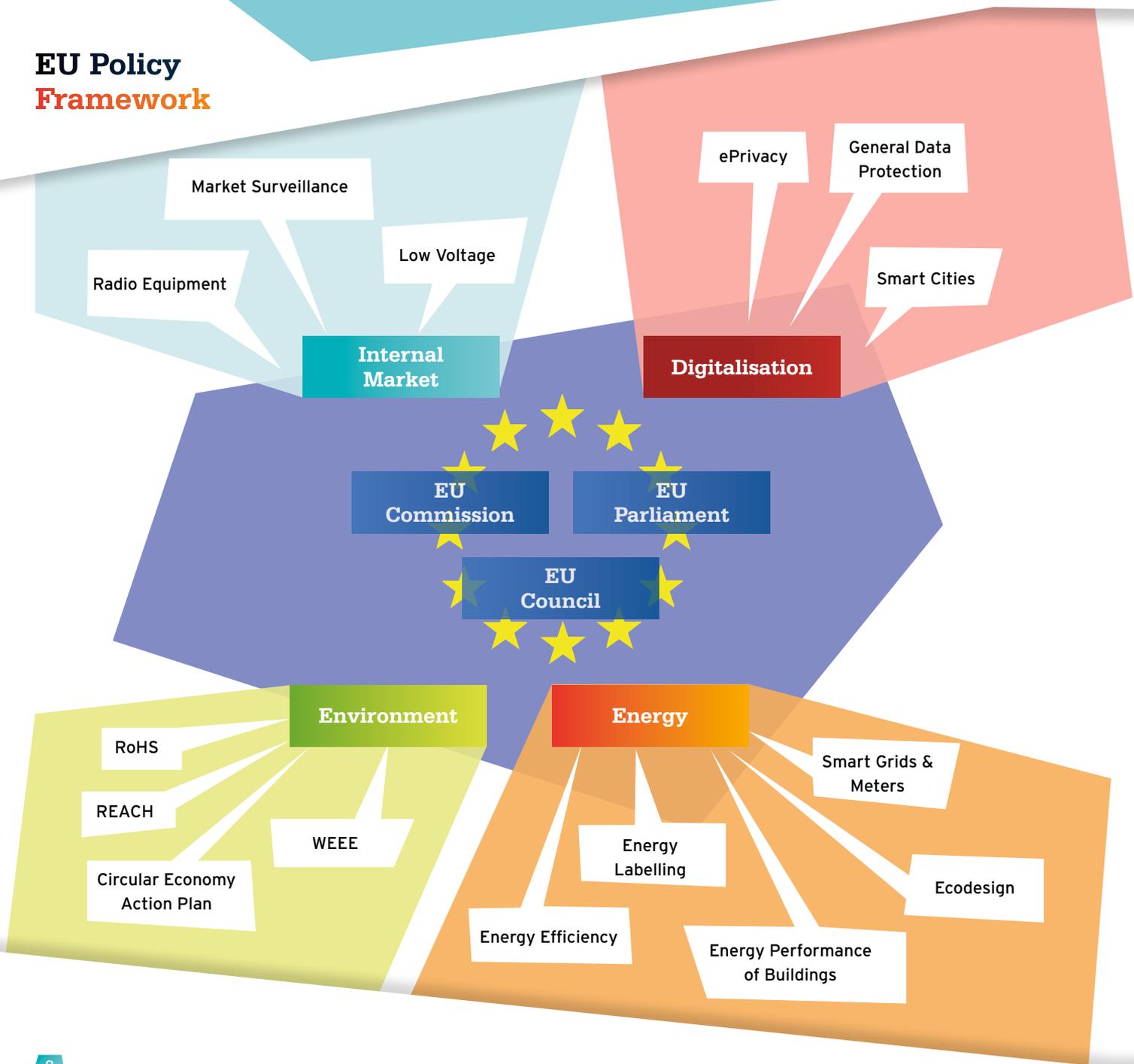


ZVEI, Germany, September/
November 2017



Strategies in Light, London,
November 2017

EU Policy Framework



LightingEurope in Numbers



POLICIES
ADDRESSED

19



EVENTS
ATTENDED

53



MEETINGS WITH
COMMISSION

13

LIGHTINGEUROPE
EXPERT GROUP CALLS
+ F2F MEETINGS

148



71

CONSULTATION
AND STAKEHOLDER
MEETINGS



Market Figures

Maximum EU-28 total annual electricity savings for optimized lighting system designs with controls are

20-29 TWh/year in 2030

(Source: ENER Lot 37 study)



LEDS CURRENTLY REPRESENT **< 1%**
OF THE LAMP WASTE STREAM

(Source: <https://www.recolight.co.uk/resource-centre/>)



125 TWh of primary energy savings per year
in 2030 anticipated by revision of Ecodesign and Energy
Labelling Regulations

(Source: Ecodesign Working Plan 2016-2019 of the European Commission)



IN EU-28, SHARE OF LED
TECHNOLOGY IN LIGHT
SOURCES USED:

2015: **6,5%** 2030: **81%**



IN 2015, LIGHT SOURCES
COUNTED FOR

12,4%

OF TOTAL EU-28
ELECTRICITY USE

(Source: Energy Labelling working document on light sources - November 2017)

Benefits in healthy buildings due to lighting



UP TO **25%**
INCREASE IN
RETAIL SALES



STUDENTS
ACHIEVE UP TO
14% HIGHER
SCORES



EMPLOYEES IN
OFFICE PERFORM
UP TO **12%**
BETTER



WORKERS
PRODUCTIVITY
INCREASES BY
UP TO **18%**

(Source: www.ecodesignconsultants.co.uk/healthy-buildings/
www.cbre.nl/en/healthy-offices-research)

Financials

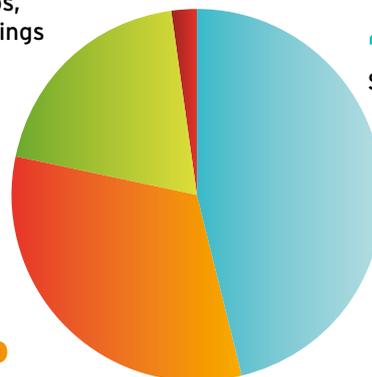
INCOME	1.163 k€
Staffing costs	538 k€
External costs	373 k€
Working Groups, projects and meetings	228 k€
COST	1.140 k€
Reserves	23 k€

22%

Working Groups,
projects, meetings

46%

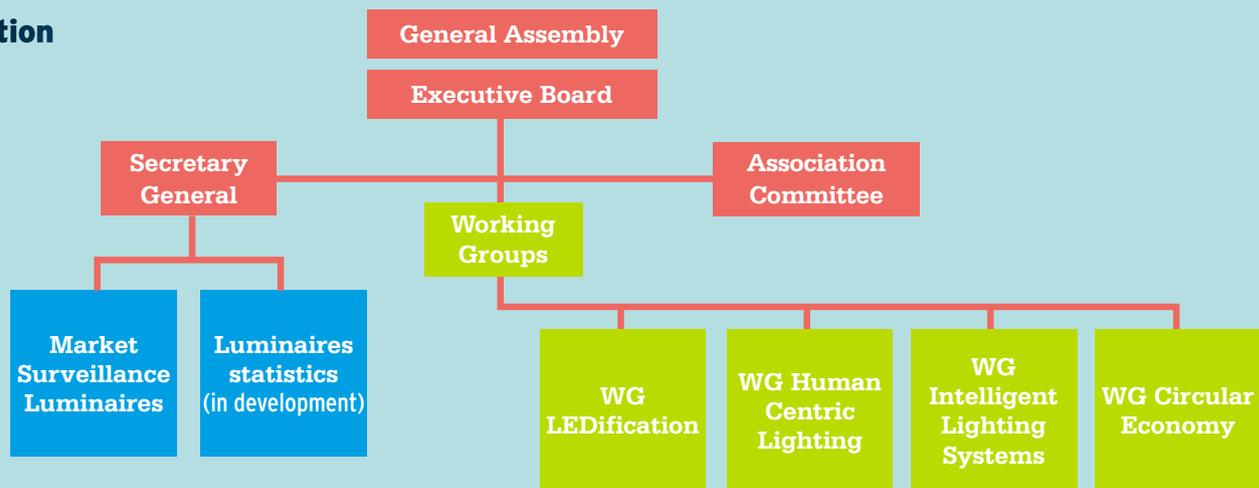
Staffing costs



32%

External costs

Organisation



Executive Board

The European lighting industry will continue to encourage and support further energy savings through lighting. We are determined to fully embrace the opportunities for users and for the industry that come with the transition towards healthy buildings, the Digital Single Market and the Circular Economy. Quality of lighting that benefits the user must be at the top of our minds when shaping future regulations.

The new structure introduced at the start of 2017 reflects our strategic priorities: LEDification, Intelligent Lighting Systems, Human Centric Lighting and Circular Economy. We see an increasing efficacy in our working groups with their contributions to policy developments, position papers and white papers. Outreach activities to the Brussels arena and to other stakeholders have intensified considerably this year.

We welcome our new Secretary General, Ourania Georgoutsakou, who has quickly built on the fine work of her predecessor, motivated and nurtured our team of talented, enthusiastic young influencers and has made important new connections in the relevant departments in Brussels.

We would like to thank Lionel Brunet, Treasurer for 2016-2017, for his sound financial management. Under his stewardship the organisation has balanced accounts and a healthy reserve, both of which allow us to invest in developing new services and providing more value to members.



Lionel Brunet
Syndicat de l'éclairage (FR)



Alfredo Berges
ANFALUM (ES)



Dr. Peter Besting
Panasonic Lighting (DE)



Nathalie Coursière
IGNES (FR)



Jean-Marie Croué
GIL (FR)



Jan Denneman
Philips (NL)



Pascal De Langhe
AGORIA (BE)



Massimiliano Guzzini
ASSIL (IT)



Frank Hohn
OSRAM Licht (DE)



Peter Hunt
LIA (UK)



Zoltán Pilter
GE Lighting (HU)



Christian Schraft
FEILO SYLVANIA (UK)



Lars Stuehlen
LEDVANCE (DE)



Jan van Rompay
Lumileds (NL)



Dietmar Zembrot
TRILUX Group (DE)



Dr. Jürgen Waldorf
ZVEI (DE)

5th Anniversary of LightingEurope

2017 marks 5 years since LightingEurope was formed from the merger of CELMA and ELC. This was a logical progression of several years of work by both former associations to arrive at a single industry position and to have a stronger voice in Brussels.

Our Members and Partner Associations 2017



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Where roads converge and opinions are generated, LightingEurope acts as the valid interface to transfer the proposals of the industry and the lighting market to the European Institutions and, at the same time, towards the National Administrations.

All of this meets in a point that allows to establish the European sectoral policy for the lighting sector.

Alfredo Berges,
General Manager,
ANFALUM, Spain



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LightingEurope is a decisive partner for Buildings 2030. Our organizations share a common goal to elevate people's health, well-being and productivity in the building sector to the top of the European agenda. LightingEurope and its members share the same determination to promote a human-centric approach to buildings in policy and market practices.

Rodolphe Nicolle,
Executive Director of
Buildings 2030



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LIGHTINGEUROPE
THE VOICE OF THE LIGHTING INDUSTRY

For further information
LightingEurope Secretariat
+32(0) 2 706 86 08
contact@lightingeurope.org
www.lightingeurope.org



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