



LIGHTINGEUROPE

Advocating the Value of Lighting

2018 ANNUAL REPORT



#BetterLighting



Peter Hunt
President
2017 - 2019

Giving a strong voice to the industry and the value of lighting

2018 has been dominated by our advocacy work on the new Single Lighting and Energy Labelling regulations and the EPREL database. As the negotiations draw to a close, we will soon be able to reflect on our successes in driving what we hope will be a pragmatic solution for the lighting industry.

We've been promoting lighting's contribution also to health and comfort, e.g. in smart and healthy buildings. In the Autumn we launched our #BetterLighting campaign to increase awareness of the visual and non-visual effects of lighting in the Brussels arena. I am particularly pleased that LightingEurope is campaigning for better market surveillance and a solution to compliance and tax avoidance through certain online platforms.

Ourania and the staff in Brussels have worked tirelessly to increase their connections and influence which reached new heights during the Summer when they secured a meeting with Vice President Katainen and Commissioner Arias Cañete to put our case for better regulations. We also saw a welcome increase in LightingEurope membership despite a difficult trading year.

I would like to thank the members and staff of LightingEurope and my colleagues in the Executive Board for all that we have achieved together. It's been an absolute pleasure to be part of this amazing group of professionals all dedicated to giving a stronger voice to this industry and the value of lighting. With a change of the European Parliament and Commission in 2019, I am confident LightingEurope is well placed to ensure the voice of the EU lighting industry is heard and understood.

Well placed to navigate and impact the EU's complex regulatory environment

Looking forward and as we prepare for new rule-makers in the European Parliament and Commission, we have a set of complex regulatory challenges that we need to get right.

The Executive Board has reviewed our progress towards achieving the LightingEurope 2025 Strategic Roadmap and has set out the priority actions for 2019-2021. By pooling our knowledge and resources within LightingEurope, the lighting industry is well positioned to impact the evolving regulatory environment.

The Circular Economy is an opportunity for the lighting industry. We will continue to size up the business potential and to shape a consensus about how to apply circularity to lighting products and business models.

LightingEurope supports simple rules that are easy to understand, apply and enforce. We will step up our efforts on better enforcement to deliver safe quality products and a level playing field. Online sales are increasingly a source of non-compliance for lighting and we will have to address this.

We will continue to explain and demonstrate the value of lighting and have it reflected in future policies and rules, such as for smart cities, smart buildings and people-centric environments. Our #BetterLighting campaign is a first step to explain how lighting impacts people, we will now focus on reinforcing our collaboration with the downstream value chain to roll out better lighting for everyone.

My sincere thanks to Peter Hunt and the members of the Executive Board for their leadership over the past 2 years, and to all our members, staff and partners, who have contributed to our achievements in 2018.



**Ourania
Georgoutsakou**
Secretary General

Strategic Roadmap

The LightingEurope Strategic Roadmap 2025 is the framework for LightingEurope's advocacy work in Brussels. It demonstrates the increasing growth in the value of light to society. We pursue the following objectives:



LEDification

Create value through quality of light



Intelligent Lighting Systems

Create value by stimulating more intelligence, controls, sensors and dimming



Human Centric Lighting

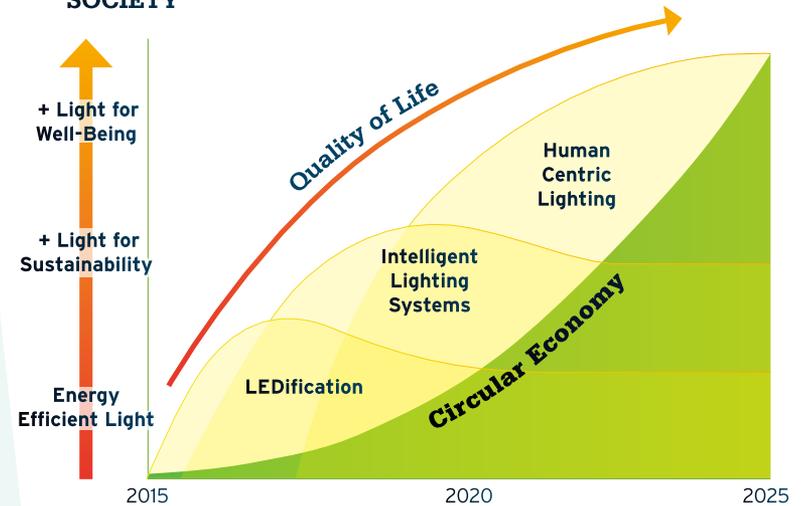
Advocate for the true value of light in excellent visual, biological and emotional benefits



Circular Economy

Create value by minimising the environmental footprint

Growth of VALUE of LIGHT to SOCIETY



LightingEurope Team



Ourania Georgoutsakou
Secretary General



Elena Scaroni
Policy Director



Marion Ebel
Senior Policy Officer



Roumiana Kamenova
Policy Officer



Dominik Flikweert
Policy Officer



Antoniya Stoycheva
Office Manager

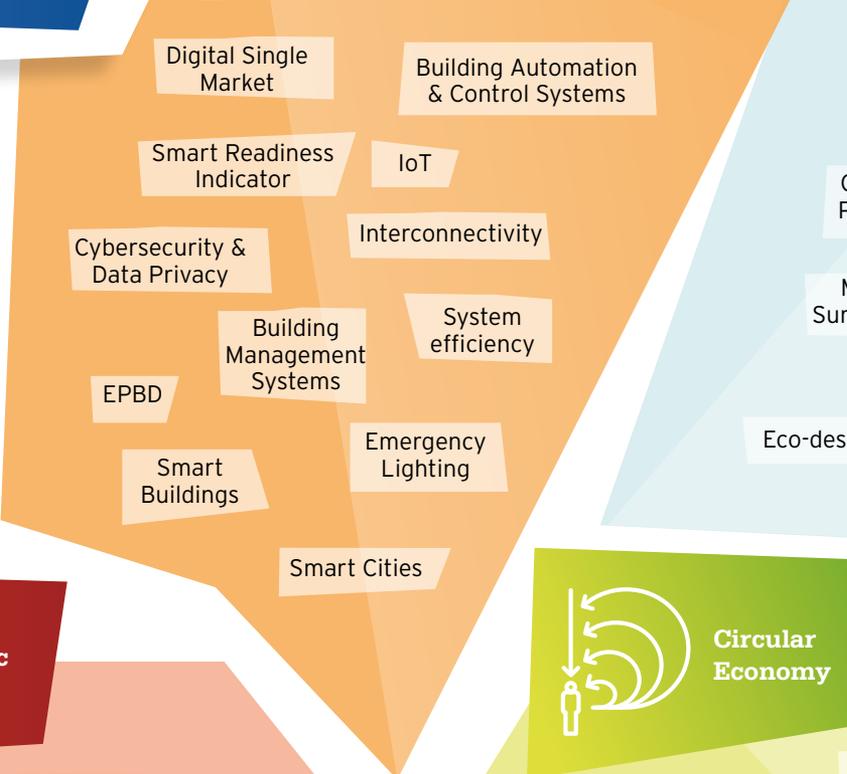


Axel Baschnagel
Communication Consultant

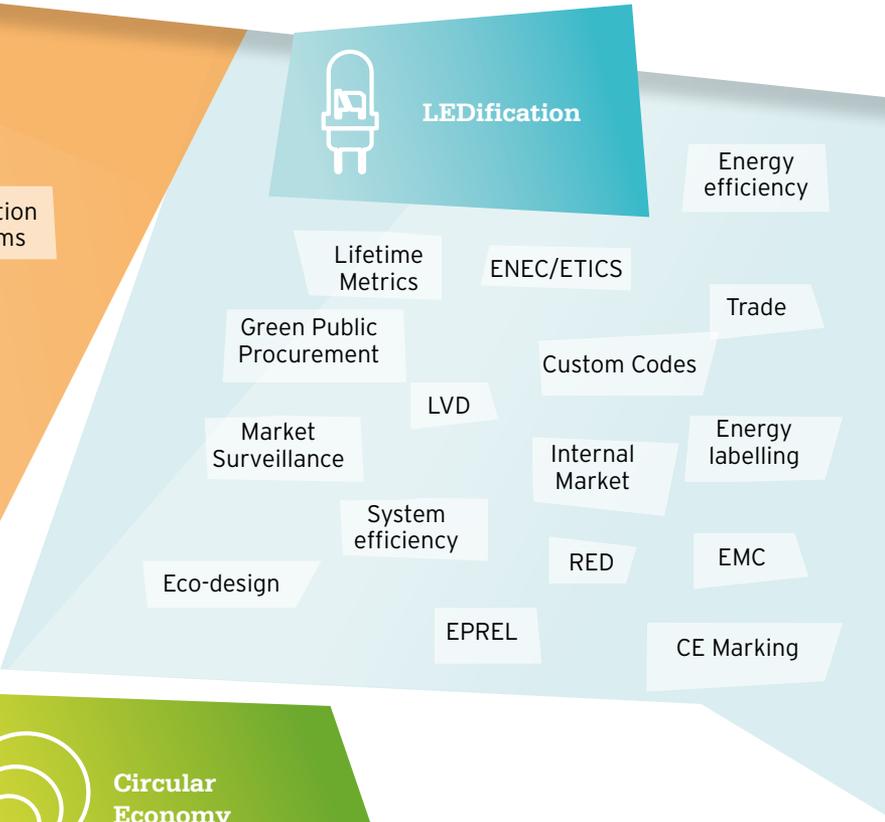
EU Policies impacting Lighting

LightingEurope is collaborating with EU institutions and stakeholders in a wide range of policies impacting lighting, responding with expert information and promoting the value of lighting.

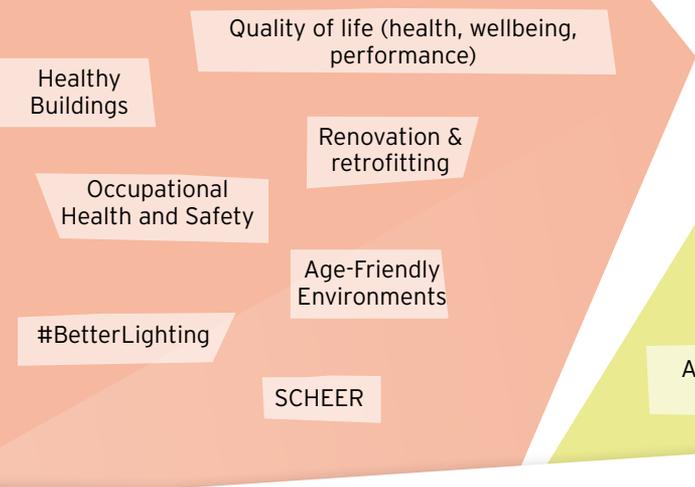
Intelligent Lighting Systems



LEDification



Human Centric Lighting



Circular Economy



Advocacy Highlights & Achievements 2018

Health & Comfort and Smart Readiness Indicator now included in revised EPBD

The revision of the EPBD offered the opportunity to set building efficiency requirements that encourage the uptake of lighting systems and move towards Human Centric Lighting. We succeeded in

- including wellbeing and visual comfort in the legislative requirements
- adding 'built-in lighting' as a key parameter in calculating the energy efficiency of buildings
- ensuring that the building efficiency calculation will now be performed according to LENI (EN 15193-1:2017)

LightingEurope had also advocated strongly for a 'Smart Readiness Indicator' (SRI), which was adopted as a voluntary measure.

The SRI offers benefits in terms of energy efficiency, comfort and wellbeing, and further enhances the use of lighting systems and uptake of Human Centric Lighting applications.

Final EU SCHEER report confirms no evidence of LED adverse effects to health

The Scientific Committee on Health, Environmental and Emerging Risks (SCHEER) was tasked by the European Commission to assess the potential health hazards in the general population due to LED usage. LightingEurope contributed with technical information about the functioning of LEDs. In its [Final Opinion of July 2018](#), SCHEER concluded that there is no evidence of adverse effects to health from LEDs and acknowledged the technology is still evolving and requires further research in the future.

Increased collaboration with other sectors

We have continued to increase our cooperation with other sectors and associations, in order to reinforce our advocacy and further disseminate the value of lighting. Some highlights this year:

- LightingEurope brought together 17 trade associations, representing the users of lighting products, to co-sign a joint statement on the need to adopt a realistic timeline for the phase-out of conventional technologies and align RoHS and Ecodesign.
- We started collaborating with new partners to encourage the adoption of better lighting: architects, electrical installers, real estate, older persons associations, organisations working on age-friendly environments and wellness in buildings.

Addressing EU chemicals legislation

LightingEurope has continued to liaise with the EU on behalf of the lighting industry and the users of these products, to apply for new exemptions and for the renewal of existing exemptions under RoHS covering products containing mercury, lead and cadmium.

We have multiplied our calls for a pragmatic approach and clear rules that are easy to understand and apply, engaging in the discussions on the future of EU chemicals rules and their interface with product and waste legislation and on the new database on substances contained in articles that the European Chemicals Agency (ECHA) has been mandated to set up.

Exemption of luminaires from the EPREL database

The Energy Labelling Framework Regulation (EU 2017/1369) creates a new European Product Registry for Energy Labelling (EPREL). As of 1st January 2019, all products covered by a Delegated Act on energy labelling must first be registered in the EPREL database before they are placed on the EU market for the first time. LightingEurope has repeatedly argued that the scope and administrative burden of EPREL for lighting products would be immense (covering millions of products including both lamps and luminaires) and has asked for a reduction of the scope. The European Commission has agreed to reduce the scope to only lamps and LED modules replaceable by end-users and therefore excluded luminaires from the scope of EPREL.

Circular Economy applied to Lighting

For LightingEurope, the Circular Economy is an opportunity for the lighting industry and we are forging a consensus on how to apply circular principles to lighting. In 2018 we:

- have been working on new RoHS exemptions for lighting technology, such as on Cadmium, to allow for new innovative LED,
- succeeded in explaining that no single mandatory removability requirement can be applied across all lighting products and applications. The final draft European Commission text of the EU ecodesign rules did not include a mandatory, across-the-board removability requirement for light sources,
- launched a study to size up the potential value of serviceable luminaires, looking at different products and levels of serviceability and evaluating the business potential they may generate,
- exchanged with other sectors (incl. home appliances, automotive, independent repairers) to understand how they have applied circular principles to their products and business models, e.g. access to spare parts, working with authorised repair networks, addressing safety, warranty and liability.

Emergency Lighting out of the scope of EcoDesign regulation

During the revision of the EU EcoDesign rules, there was a risk that the current exemption for emergency lighting would not be continued and that emergency lighting would have to comply with the new rules. LightingEurope advocated and succeeded in excluding emergency lighting from the draft text of the next EcoDesign legislation, arguing that emergency lighting does not serve general lighting purposes and is primarily a safety product.

Shaping the future EU ecodesign rules for lighting

LightingEurope has been engaging with the European Commission and their consultants to help shape the next energy performance rules for lighting products. The Commission's final proposal for an Ecodesign regulation for light sources includes the following LightingEurope proposals:

- a more realistic timeline (Sept 2021) for the phase out of conventional products, compared to the one initially proposed by the consultants (Sept 2019)
- a set of exemptions for special purpose lamps from the Ecodesign requirements
- basic removability requirements to ensure light sources can be removed for the purpose of checking for compliance and recycling/reuse at end of life
- mandatory information requirements for consumers to inform them of the replaceability or non-replaceability of the light source and the control gear.

New Custom Code definitions for LED products improve the level playing field

The custom codes in the Harmonised System (HS) of the World Customs Organisation serve as a basis to determine the international trade tariffs in accordance with World Trade Organisation rules. The custom code definitions are revised every five years.

- Together with other lighting industry associations around the world, LightingEurope successfully advocated for revising custom codes for LED products to ensure an aligned technical base that is prepared for future developments in the lighting sector.
- At the same time, the new HS 2022 will help rectify cases of incorrect classification of LED products which sometimes resulted in significant cost disadvantages and a non-level global playing field in international competition.

Increase enforcement of EU rules

LightingEurope has engaged in the debate on new market surveillance rules, re-launched in December 2017. LightingEurope, together with other industries, has successfully advocated against the proposal of the European Parliament Rapporteur to introduce a 'conformity database' for Market Surveillance authorities, arguing that this would create an additional burden for the industry with no clear added value for authorities. We need more actions to enforce EU rules and quickly remove non-compliant products from the market. That's why we have been urging national governments to approve the proposals for partnership agreements with industry compliance schemes. We are also collaborating with EucoLight, representing the WEEE schemes for lighting, to address non-compliance via online sales and to call for a change in EU rules and a clear allocation of liability to actors that are within EU jurisdiction.

LightingEurope in the Public

LightingEurope events



Light+Building

March 2018

Bringing Brussels EU rule-makers to Frankfurt to discuss with the industry how EU policies impact lighting



Workshop on Repairability

June 2018

Drawing inspiration from other industries on growth opportunities and challenges



Meeting with EU Commissioners

July 2018

Putting forward our case for better regulations with Vice President Katainen and Commissioner Arias Cañete



Going Digital - the Case of Lighting

November 2018

Addressing cybersecurity, artificial intelligence and human centric lighting

LightingEurope presented in 2018 at



Home Appliance Europe, Brussels, February



Joint Research Centre, Frankfurt, March



Association of Finnish Lighting Manufacturers, Helsinki, April



EucoLight, Sassenheim, April



Italian Association of Lighting Manufacturers, Milano, May



European Ventilation Industry, Brussels, May



Lighting Fixture Design Conference, London, June



Sustainable Energy Week, Brussels, June



Syndicat du Luminaire, Paris, September



LED professional Symposium, Bregenz, September



HERCA meeting, Athens, September



Reprolight project meeting, Arnsberg, October



International Association of Lighting Designers, Barcelona, November



L'Institut Belge de l'Eclairage, Brussels, November



RINA conference, London, November



Lighting Division meeting, Antwerp, November



Netherlands Lighting Association, Zoetermeer, November

Advocacy in Numbers

LightingEurope online



1500

FOLLOWERS

UP TO **45 000**
TWEET IMPRESSIONS
/MONTH



1100

FOLLOWERS



UP TO **3700**
WEBSITE SESSIONS/
MONTH

#BetterLighting



LightingEurope launched the #BetterLighting campaign on 25 September, targeting the Brussels/EU-sphere. With a dedicated website and daily social media posts, our aim is to help people appreciate the value of lighting, using simple information and images to explain both the visual and non-visual effects of lighting. Help us spread the message by sharing #BetterLighting #BetterLife #valueoflighting



www.valueoflighting.eu



A day in the life of
Christine Robert
Emma

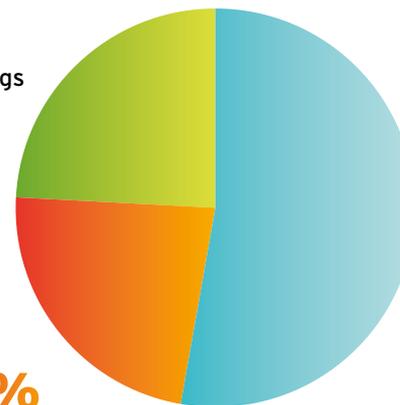


Financials

INCOME	1.068 k€
Staffing costs	561 k€
External costs	251 k€
Working Groups, projects and meetings	256 k€

24%

Working Groups, projects, meetings



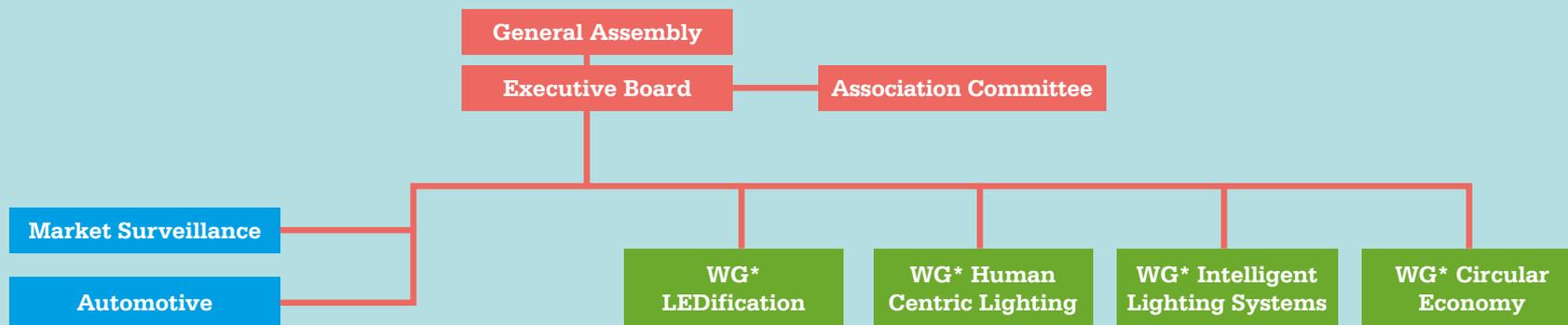
53%

Staffing costs

23%

External costs

Organisation



* WG = Working Group

Executive Board

The disruption in the lighting market by LEDification has required adapting company structures and strategies, business models, supply chains and products. Looking forward, no one really knows what the Internet of Things will really mean and how lighting will become part of the fabric of this internet of everything. The lighting industry will have to adapt further and identify new ways to generate value, addressing for example new value chains, new actors on the market, and capturing new opportunities generated by the circular economy and delivering the value of lighting.

In navigating successfully through these changes, we see the value of a trade association such as LightingEurope: offering a compliant platform to discuss with peers, getting early insights into future policy and market trends and shaping EU policies and rules. The team of LightingEurope has done an excellent job in 2018 in providing this platform and knowledge.

As new Board Members we welcome Susana Josa (Lutron Electronics), Chris Van Bellegem (Agoria) and Maurice Maes (Signify) who has also taken on the role of Treasurer.



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)



Maurice Maes
Signify (NL)



Chris Van Bellegem
AGORIA (BE)



Massimiliano Guzzini
ASSIL (IT)



Frank Hohn
OSRAM Licht (DE)



Peter Hunt
LIA (UK)



Zoltán Pilter
Tungsram (HU)



Susana Josa
Lutron Electronics (UK)



Lars Stuehlen
LEDVANCE (DE)



Jan van Rompay
Lumileds (NL)



Dietmar Zembrot
TRILUX Group (DE)



Dr. Jürgen Waldorf
ZVEI (DE)

Our Members and Partner Associations 2018



The year that has passed has had many important European issues for the industry on the agenda. LightingEurope has been a major support for our national trade organisations. By combining the extensive knowledge and broad network of LightingEurope's staff and the expertise of the other members, your support and assistance has always been invaluable to us. Thank you for an inspiring and a fulfilling 2018. We look forward to continuing our fine cooperation with LightingEurope in 2019.



Mikael Castanius, Managing Director, Lighting Sweden



LightingEurope successfully lobbied three key issues this year. First, the "Single Lighting Regulation" and linked to this the Energy Labeling Regulation, where LightingEurope was well supported by all members and was able to influence a number of relevant issues. Second, "Human Centric Lighting", with the Better Lighting campaign positively promoting this topic in a clear and easily understandable way. Third, essential requirements in the recast of the "Energy Performance of Buildings Directive" have been given by European legislation. Each member state now has the chance to create an ambitious national implementation for 2019 and beyond.



Dr. Jürgen Waldorf, Managing Director, ZVEI Lighting Division



LIGHTINGEUROPE
THE VOICE OF THE LIGHTING INDUSTRY

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