Challenges and opportunities in the transformation of Lighting

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The current lighting market

- LED technology has resulted in some anarchy and disruption
  - Many „new kids on the block“
  - Increasing number of promised product features
  - Regulation far behind on issues like safety or product classification

- High expectations from private and professional consumers

- Growing need for guidance to the market and unified representation of the lighting industry
What is LightingEurope?

∑ > 1000 companies with > 100000 employees > 20 billion turnover
LightingEurope members
Our Mission?

- Promote the **interests of our Members**
- Stimulate optimum market conditions and a level playing field
- Ensure **that Europe remains leading in lighting**

LightingEurope is the **one-stop-shop** for industry input on lighting issues for the EU Institutions
Communication and Education

**Features**

- **Connecting** policy-makers and industry
- **Expertise** on EU policy, legislation and organization
- **Facilitating** expert working groups
- **Contributing** to media, events and conferences
- **Educating** for higher standards

**Benefits**

- Know the right MEPs and Commission officials
- Gain visibility among EU officials
- Find your way within the EU machinery
- Learn in time about policy impacts for your business
- Benefit from EU funding programs
- Work together with industry peers and experts on market-relevant issues
- Shape EU legislation with a common position paper
- Understand EU regulations from technical guides
- Communicate the industry position
- Example: improve lighting with highly qualified lighting designers
Agenda

- Lighting beyond illumination
- Policy Trends & Activities
- LightingEurope Strategic Roadmap 2025
Nature

Natural light is dynamic from sunrise to sunset

Mankind has evolved under this light - dark cycle.

24 hour rhythms dominate much of what we are:
• Nearly all organisms respond to 24 hour rhythms and with changing seasons
• The eye links light and darkness with the body
• Intensity, color, timing and direction are very important in circadian lighting
Our daily world

Artificial light is static from when we wake until we sleep.

On a sunny day people outside get 100,000 lux.
On a cloudy day 10,000 lux.
Indoor in offices people get 500 lux.
And in school only 300 lux.

People spend 90% of their time indoor.
The impact of light

Light has an effect on

**Vision**
*Sight*

**Body**
*Alertness, cognitive performance and sleep/wake cycle*

**Emotion**
*Mood, energize and relaxation*
Light requirements and settings vary by application

We need the right light at the right place at the right time to support our activities
Look beyond energy efficiency
Human Centric Lighting increases the vision, well-being and performance of people

If cost of energy is only 1% of the typical business operation costs, why do we concentrate on energy savings and not on having healthier, happier and more effective people?
Human centric lighting can be a multi-billion-euro business in Europe

- **Optimistic scenario** assuming
  - Healthy economic climate
  - Significant infrastructure investments

- **Conservative scenario** most probable, assuming
  - Selective government support
  - Joint industry initiatives
  - Considerable marketing investments

- **Pessimistic scenario** assuming
  - Poor economic climate
  - Little infrastructure investments

Source: A.T. Kearney “Light and Health” market model
Agenda

- Lighting beyond illumination

- **Policy Trends & Activities**

- LightingEurope Strategic Roadmap 2025
Who do we talk to?

- EU Commission/Directorate General’s
- National and Brussels level legislators
- Partner organizations
- General Public
- Our Members
Trends and Policies

- Integration of products
- Integration of sensors
- Controlling via Internet
- Digitalization
- Energy Saving
- Stronger consumer voice
- Ledification
- New players

Technology

IOT

Market

Energy Saving

Ledification

Policies

Customs Union

Energy Union

Digital Single Market

Climate Action

Market Surveillance

Re-industrialization of Europe

Trade

Energy Union

Re-industrialization of Europe

Trade

Energy Saving

Stronger consumer voice

New players
EU Policy Framework
Agenda

- Lighting beyond illumination
- Policy Trends & Activities
- LightingEurope Strategic Roadmap 2025
The Strategic Roadmap of LightingEurope demonstrates the increasing growth in the value of light to society.

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

The European lighting industry is aiming together with European Regulators for the **growth of the European lighting market** by 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.
Strategic Focus Areas

- LEDification (LED)
- Intelligent Lighting Systems (ILS)
- Human Centric Lighting (HCL)
- Circular Economy (CE)
Aims

➢ The uptake of Intelligent Lighting Systems will be increased by simpler legislation that enables differentiation and which is easy to enforce

➢ Stimulate more intelligence, more controls, more sensors, more dimming etc

➢ The lighting system should be seen as a black box with interfaces to adjacent industries allowing an integrated (holistic) approach to controlling the quality of light and systems within the industry

➢ Stimulate the development of interface standards

➢ Consider developing a LiFi strategy

➢ Step up the rate of renovation of the built environment
Circular Economy - a key objective
LEDification – Outlook 2017 (1/2)

**Single Lighting Regulation**
- Draft Regulation to be presented by DG ENER later this year
- Continued outreach activities towards Commission, Parliament, and Member States

- Organising outreach towards Parliament and Member States, to ensure that the Directive will be properly transposed into national law

**Ener LOT 37 Study on Lighting Systems**
- To provide our feedback in response to concrete proposals by COM at the end of the year
LEDification – Outlook 2017 (2/2)

Energy Labelling Regulation
- Promoting the proposal of 18 months lead time for implementation of rescaled label

LED Lifetime Metrics
- Finalise task to provide guidance to end-users that enables ‘apples-with-apples’ comparison between LED-based luminaires
- TF to be dissolved mid-2017

LED Custom Codes
- Continuation the existing TF on LED Custom Codes, which will also finish its tasks mid-2017
Digital Transformation
- Monitor legislative developments concerning data protection, smart cities and smart grids, and IoT
- ‘Making Li-Fi tangible’

Lighting Gateway
- Steering the WGs towards a harmonised view (White Paper) on the place of the lighting industry in today’s digital world

Monitoring and stakeholders
- Assessing and monitoring standards in the fields related to the tasks of the WG Intelligent Lighting Systems
- Reaching out to potential stakeholders and partners

Emergency Lighting
- Coordinating of the emergency lighting discussion on subjects that are relevant for emergency lighting
Human Centric Lighting – Outlook 2017 (1/2)

TF Advocacy (EU)
Aim: create awareness for HCL in the Brussels arena (DG and MEP) and find political sponsors.
Deliverable: organize specific HCL events for DG and MEP.
Actions:
- Reach out to and meet the DGs Sante, Energy, GROW, OIB.
- Look at EU organigrams to find contact persons and link HCL to their work.
- Update HCL promotional presentations for the target groups
Human Centric Lighting – Outlook 2017 (2/2)

TF Healthy Buildings

Aim: create alliance / cooperation on Healthy Buildings resulting in market pull for HCL

Deliverable: agreement with at least two other bodies on promotion of Healthy Buildings as theme

Actions:
- Reach out to and meet e.g. IALD, IWBI, EU network GBC
- Reach out to associations on other indoor environmental quality aspects (air, temperature, …)
- Create Healthy Buildings promotional presentation including HCL
- Find a way for cooperation together in Europe
- Include both new and existing buildings (renovation)
| TF RoHS         | ▪ Renewal of exemptions  
                | ▪ Lobbying with relevant EU and national Stakeholders |
| TF REACH       | ▪ Participate in consultations on the refit evaluation, monitor/apply for exemptions, registrations |
| TF WEEE        | ▪ Monitor Waste legislation under (WEEE) - producers |
Circular Economy – Outlook 2017 (2/2)

- Research availability of projects at EU level which will help fund research and development for Circular Economy. Secretariat to make proposals.

- Research/monitor whether standards are being developed on reparability and serviceability - Digital Europe and CECED have asked LE to join.

- Research the opportunities we have as an industry to work towards serviceability and reparability – to then put forward in a White Paper.
Growth - plans 2017

- **Market Surveillance** for luminaires
- **Trade agreements**
- **Standardization:** LE guidance document on revised Directives LVD & EMCD
- Luminaires **statistics**
Conclusion

➢ LightingEurope to prepare European stakeholders for a digital lighting world
➢ New strategic topics like human centric lighting and circular economy will be our main focus areas
➢ Energy saving is today a key target in the dialogue with EU institutions
➢ Regulation must ensure level playing fields for all lighting players and therefore needs market surveillance
➢ The European lighting industry will keep their leadership role by defining and implementing their Strategic Roadmap 2025 to guide all stakeholders
Thank you for your attention

www.lightingeurope.org