

THE LAMP

2007 Annual Report

FROM THE PRESIDENT



This has been without a doubt one of the most challenging years in recent times for the ELC and its member companies. As the climate change agenda heats up, the bulk of the European Commission studies on lighting in preparation for measures being considered under the EUP Directive came to completion. Technical and policy support from our member companies and external consultants with careful co-ordination of the ELC Secretariat was crucial to formulating the timely positions developed on Street and Office lighting. These positions along with that formulated on the less straightforward issue of Domestic Lighting were the subject of numerous discussions with numerous

stakeholders including Member States in the various consultation forums hosted by the European Commission. We expect that implementing legislation, the first of its kind for lamp manufacturers is agreed and enters into force next year setting energy efficiency limits on lamps used in street & office applications. The domestic lighting study due to be completed in 2008 (Part 1) & 2009 (Part 2) deals with the more controversial issue of a phase out of the least efficient incandescent lamps in the European Union with NGO's, lighting designers and various other interest groups strongly expressing their opinions for and against the phase out plans.

At any rate the ELC members made public early in 2007 their own plans for the phase out of least efficient incandescent lamps highlighting plans to ensure that European consumers will continue to find suitably efficient replacements in a number of alternative technologies (halogen, fluorescent & LED) of all wattages for incandescent lamps that are likely to be phased out. Indeed the issue of sufficient capacity to ensure constant supply of energy efficient, good quality lamps to the European market features highly in the ELC plan and is the reason for the eight year phase out period proposed. We continue to use the ROMS WG (Roll-Out Member States) set up late in 2006 to communicate ELC positions to initiatives and various developments in Brussels, in the Member States to our lighting network. This has proved an invaluable complement to work in Brussels and helps to provide technical and policy support to member state activities on lighting policy.

We look forward to the challenges of 2008 with renewed vigour and have confidence in the structure, processes and resources our members have put forward at this very special period in the history of the European Lamp Manufacturers.

A handwritten signature in black ink, appearing to read 'Jan Denneman', written over a white background.

Jan Denneman
President ELC

The Global Lamp Forum meets in Brussels

For the first time in history, the ELC Federation and representatives of the lamp associations from Australia, China, Japan and the USA held a joint session to promote energy efficient lighting. The meeting took place in Brussels on 19th October.



The industry associations committed to a global cooperation program aimed at climate change prevention, energy efficiency and CO2 emissions reduction.

The meeting of European, Chinese, Japanese, American, Indian and Australian associations centred on discussions of how the lighting industry can:

- Promote energy efficiency with governments and consumers
- Contribute to reducing the impact of climate change and waste

Likewise, the lamp associations tackled other issues, which are currently in their agendas: the implications for the global industry of health-related concerns; SSL (Solid State Lighting) initiatives and the emerging standards for LEDs and OLEDs; WEEE and the development of a strategy on hazardous waste reduction; trade issues such as conformance surveillance and certification labeling issues; they also launched a common CFL Harmonization Initiative.

The representatives shared experiences on regulatory best practice and public awareness program aimed at increasing awareness of the benefits of energy efficient lighting. This global coordination meeting will formally reconvene annually or biannually in order to report on ongoing regional initiatives and to assess the results of this cooperation. The next meeting will take place in Japan on 3rd and 4th July 2008.



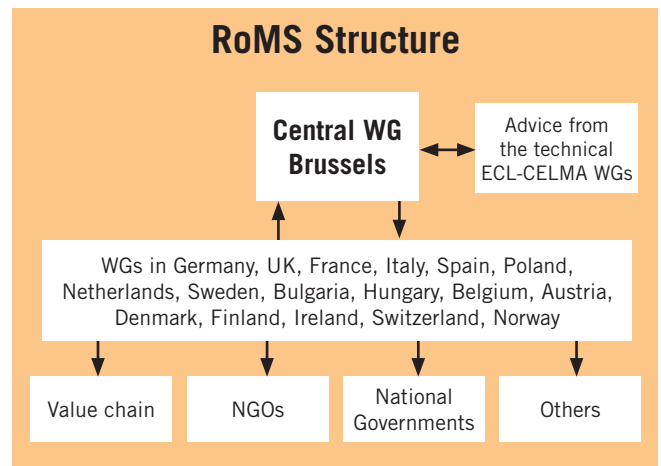
ELC WGs

RoMS or how we deploy our message in the European Union

Roll-Out Member States (RoMS) is a Working Group that kicked-off in late 2006 – beginning of 2007, jointly with CELMA (the European Federation of Luminaires and Gear Industry), to deploy an energy efficient lighting program in the European Union. Made of representatives of both the ELC and CELMA, RoMS works on a two-level basis:

- Centrally in Brussels, analyzing the EU-related issues and coordinating with other Working Groups to deliver messages and strategies to the member states;
- Locally, in each Member State where a local Working Group has been set up, lobbying the national administrations and contacting other stakeholders (NGOs, the value chain, etc.) to get across the agreed messages.

The main objective is to roll out industry messages at the national level and support national lighting representatives (representing a joint CELMA-ELC position) to encourage national governments to create policies, initiatives and support mechanisms that will encourage a market transformation to more energy efficient lighting systems.



RoMS is currently operating in 17 countries: Germany, UK, France, Italy, Spain, Poland, Netherlands, Sweden, Bulgaria, Hungary, Belgium, Austria, Denmark, Finland, Ireland, Switzerland and Norway.

Among other, the functions of RoMS are:

- Help develop policies and initiatives to support the market transformation to more energy efficient lighting;
- Provide technical information about energy efficient lighting;
- Work with a range of stakeholders (governments, NGOs, retailers, etc) to develop and communicate user-friendly information to assist end users to overcome current barriers;
- Provide information and best practice examples from our colleagues in Europe and share information on key developments.

At the same time, RoMS intends to facilitate a common industry approach in the Consultation Fora and Regulatory Committees that will discuss the implementing measures for street, office and domestic lighting, to be adopted under the Energy-using Products Directive (EuP, 2005/32/EC).

In 2007, the RoMS priority has been the incorporation of lighting-related measures in the National Energy Efficiency Action Plans (NEEAP) that each Member State had to adopt, following the 'Energy End-use Efficiency and Energy Services Directive' (ESD). All efforts have been directed to this important goal. In view of the results achieved (see article on the ESD and

NEEAP), it can be said that RoMS has proven to be a very useful cooperation tool. New important targets have been set for 2008, among them, the implementation of the measures included in the NEEAP, as well as the transposition of the Directives on Energy-using Products (EuP, 2005/32/EC) and Energy Services (ESD, 2006/32/EC).

Point of contact: Santiago Barón (ELC)

LED (Light Emitting Diodes), a new potential for the ELC

LED is a new Working Group created in 2007. With a view to positioning LED technology in the public eye and to identify legislative opportunities to increase the uptake of LED technology in the context of energy efficient policy discussions, this Working Group has incorporated representatives from 4 ELC member companies.

Among the objectives of this Working Group, the following can be stressed:

- To promote LEDs as energy efficient lighting solutions wherever appropriate and in a way that satisfies end user needs;
- To formulate a glossary of standard terms/definitions for LEDs;
- To find straightforward, logical arguments to effectively establish the business case leading to the increased uptake of LED Technology;
- To establish a clear communications package to effectively position LEDs;
- Lobbying and any other appropriate action to safeguard ELC interests on technical aspects of energy efficient products.

A new communications strategy for the lamps industry

A new Communications Working Group was also set up in 2007. It intends to present the ELC identity and messages to the public through the media.

With a view to achieving this, the ELC agreed to work with 'Burson Marsteller Brussels', a company specialized in Europe-wide public affairs campaigns and corporate and communications services.

The Communications Working Group's main assignment is to implement an ELC Public Relations Strategy, with emphasis on the media, to support and promote the relevant ELC messages. The strategy will incorporate aspects such as:

- Proactive dissemination of relevant ELC messages as well as developing responses to joint industry issues, via the media.
- Coordination of media activities to support ELC Working Groups and EU-funded projects.
- Development and implementation of a rapid response mechanism for urgent and/or unexpected developments.

Point of contact: Barbara Manka (ELC)



Legislation

The Energy using Products Directive and the upcoming Implementing Measures

The adoption of implementing measures for street, office and domestic lighting under Directive 2005/32/EC, on the eco-design of Energy-using Products (EuP), has been one of the major issues in which the ELC and its member companies have been involved in 2007.

The EuP Directive, which was adopted by the Council and the European Parliament in July 2005, has put a challenge to our industry. It provides coherent EU-wide rules for eco-design and ensures that disparities among national regulations do not become obstacles to intra-EU trade. The Directive defines conditions and criteria for setting, through subsequent implementing measures, requirements regarding environmentally relevant product characteristics and allows them to be improved quickly and efficiently. And that's what the lighting industry has been working on in 2007.

What can our industry expect from the implementing measures under the EuP Directive?

The Implementing measures will define:

- Eco-design requirements
- Conformity assessment procedures
- Implementation dates

These criteria will be set for new installations, and not for existing ones (that can be tackled under the ESD and the related measures in each National Energy Efficiency Action Plan – see next article).

With regards to office and street lighting, their respective Consultation Fora were held on 22nd June and 18th December. A first discussion with stakeholders from all EU Member States, industry representatives and civil society was held. It is foreseen that the Regulatory Committee meets in Summer 2008 to vote the implementing measures, after which the European Commission would launch an inter-service consultation that could lead to their adoption by the European Parliament and the Council by late 2008.

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In short, this proposal envisages a number of phases, starting with highest wattage lamps and gradually covering lower wattages. For each phase, there would be minimum efficiency specifications based on an energy efficiency classification and on luminous efficacy or lumens per watt. For each wattage category, manufacturers are calling for requirements to become more stringent over time. All lamps that do not carry the EU Energy Label are not in the scope of this proposal.



As said, there will be also implementing measures for domestic lighting. During 2007, the corresponding ELC Working Group has been working closely with the commissioned consultancy company in charge of its drafting, VITO. A Consultation Forum is foreseen in April-May 2008, with a Regulatory Committee vote by January-February 2009 and a possible final adoption before Summer 2009. This timeline would be in line with what the European Council of March 2007 announced as its wish, that is to see inefficient lamps out from the EU market by 2009.

Lamp Category	Phase 1 2009	Phase 2 2011	Phase 3 2013	Phase 4 2015	Phase 4+ 2017**
>100W	18 lm/W	20 lm/W			
100W		14 lm/W	17 lm/W		
75W		14 lm/W	16 lm/W		
60W			13 lm/W	15 lm/W	
40W				11 lm/W	14 lm/W
25W				10 lm/W	12 lm/W

2007, a year full of NEEAPs

The Council and the European Parliament adopted the 'Energy End-use Efficiency and Energy Services Directive' (ESD) on 30 November 2005. This Directive requires Member States to save at least an additional 1% of their final energy consumption each year for the next 9 years starting from 2008. In order to achieve these savings, Member States must adopt targets, impose obligations on their energy suppliers and prepare national Energy Efficiency Action Plans. Savings will be achieved in both the private and public sectors, using a framework of measures. The Directive will have a major impact on the work of national governments, but also on local and regional energy actors in important areas such as energy-efficient and cost-effective lighting, heating, hot water, ventilation and transportation. They will also improve the market uptake of energy efficient technology and integrate energy efficiency criteria into public procurement practices.

The adoption of National Energy Efficiency Action Plans (NEEAP) is one of the core elements of this Directive, and the efforts of the ELC and CELMA have directed in 2007 towards ensuring that lighting is included in them. In their NEEAPs, Member States should show how they intend to reach that 9% indicative energy savings target by 2016. Through a network of lighting associations, ELC companies' representatives and other stakeholders in a good number of countries, this important target has been accomplished. Out of 21 countries that by the end of 2007 had submitted their NEEAP, 17 had foreseen lighting-related measures that tackle either street, office, domestic or commercial lighting. Yet, the European Commission has also launched infringement procedures against a certain number of countries, for failure to notify their Action Plans by the deadline (30th June 2007). These countries are: France, Greece, Latvia, Luxembourg, Portugal and Sweden.

To know more about the NEEAP submitted by the Member States, go to http://ec.europa.eu/energy/demand/legislation/end_use_en.htm#efficiency

If you want to know the lighting-related measures included in each NEEAP, go to the 'Members Room' of the ELC website (Working Group RoMS 2008) and download the document 'NEEAPs, ELC summary for internal use'.

More info at:

http://ec.europa.eu/energy/demand/legislation/end_use_en.htm

WEEE brief update

In 2007 the ELC's WEEE Core Team continued to support the set up of Collection and Recycling Service Organisations with the help of PWC Belgium in several existing and new (Romania/Bulgaria) member states. A corporate governance structure was also put in place to ensure that the CRSO network shares experiences, best practice and cross learning and drives faster implementation of the WEEE directive and anticipates initiatives to follow. The ELC will continue to monitor the WEEE review process, which is due to make recommendations to improve the WEEE Directive in early 2008.

News from the ELC Secretariat

New recruitment

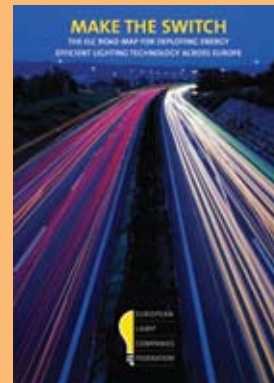
Santiago Barón joined us in March 2007. Santiago, a Spanish national who had worked for a Spanish trade association for 5 years, specialised in European issues and interned in the European Commission for 5 months, is responsible for EU-funded projects and assists the RoMS WG as project manager.

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New publications and position papers in 2007



Roadmap 2008

http://www.elcfed.org/uploads/documents/-56-finelc_road_map_11_07.pdf

FAQ on domestic lighting

<http://roms.elcfed.org/index.php?page=29>

Joint position ELC-CELMA on street and office lighting

<http://roms.elcfed.org/index.php?page=25>

EU-funded projects

Cutting Co2 emissions in Europe - bottom up!



Our Federation started a new 3-year project in 2007. 'Bottom up to Kyoto', or ButK, is a EU-funded project that the ELC is coordinating.

Its main aim is to help municipalities 'make the switch' to efficient street & office lighting systems – freeing up funds that would normally be spent on energy to operate inefficient lighting systems.

The project is partly financed by the partners and the Executive Agency for Competitiveness and Innovation (EACI) of the European Commission, under the Intelligent Energy Europe Program. The project will run for three years (until December 2009).

Over that period, the partner municipalities (County of Cluj in Romania; Raciechowice in Poland; Riga in Latvia; Slovenska-Bistrica in Slovenia, and Voru in Estonia) will develop new tools to facilitate the switch to energy efficient street or office, fulfilling the following objectives:

- To remove barriers to the uptake of energy efficient lighting systems;
- To increase penetration of energy efficient street and office lighting in Europe;
- To provide savings in term of energy and cost;
- To help EU Member States to meet the Kyoto targets on CO2 emissions reduction;
- To provide experience for other municipalities in Europe.

Our Federation, together with the Electrical Wholesalers (EUEW) and the Electrical Installers (AIE), and led by Berliner Energieagentur, will assist the five municipalities involved to overcome these barriers and to achieve significant energy savings at a local level.



The ButK Project Management Committee (made up of all project partners) met in Brussels on 12th April to kick-off with the project. The EACI project officer, Mrs Kerstin Lichtenvort, also joined the meeting. Later in June, the Committee met again in Riga, Latvia, where also the ButK Lighting Taskforce (a body that provides technical input to the Committee) met for the first time.

Also in 2007, ButK has become partner of the Sustainable Energy Europe Campaign.

Partners:

- European Lamp Companies Federation (ELC) (Belgium)
- Berliner Energieagentur GmbH (Germany)
- European Union of Electrical Wholesalers (EUEW) (Belgium)
- Association Européenne de l'Installation Electrique (AIE) (Belgium)
- County of Cluj (Romania)
- Municipality of Raciechowice (Poland)
- Municipality of Riga (Latvia)
- Municipality of Slovenska Bistrica (Slovenia)
- Municipality of Voru (Estonia)

More info at:

<http://butk.elcfd.org>

<http://www.sustenergy.org>

http://ec.europa.eu/energy/intelligent/contact/index_en.htm

Make the Switch, a communications program for EU households

The ELC put together, in 2007, a new funding proposal to the European Commission. 'Make the Switch' is a communications and dissemination project that intends to raise awareness of the benefits of energy efficient lighting for the home in 5 EU countries: Belgium, Czech Republic, Denmark, Greece and Spain.

This project proposal, which was submitted to the EACI (Executive Agency for Competitiveness and Innovation) under the IEE Program, Call for Proposals 2007, could be funded up to 75% of the eligible costs. It is structured in three different blocks:

- An 'Usage & Attitude' Survey on a realistic sample of EU households, with a view to understanding the motivations and perceptions of European domestic consumers towards energy efficient lighting for the home;
- A communications and dissemination campaign, composed of different elements (website, brochures, media campaign, PR activities,; workshops/public events, brochures, etc.) that will inform consumers about the benefits that efficient lighting can bring, both economically and environmentally,
- A final 'Usage & Attitude' Survey that will help measure the impact of the project.

The main purpose of this project is to prepare the EU market for upcoming implementing measures, under the EuP Directive, that will restrict inefficient lighting in the home. The project's direct target is end-use consumers of private households in those countries.

The ELC put together this proposal in conjunction with a consortium made up of the following partners:

- CAN – Climate Action Network (Belgium)
- OVE – Organisation for Sustainable Energy (Denmark)
- IDEA – Instituto para la Diversificación y Ahorro de la Energía (Spain)
- CEA – The Czech Energy Agency (Czech Republic)
- KAHO – University College KaHo Sint-Lieven, Laboratory for Light and Lighting (Belgium)
- CRES – Centre for Renewable Energy Sources of Greece (Greece)

The EACI will assess the proposal by the ELC in March-April 2008. If it is recommended for funding, after a negotiation period, the project would kick-off in August-September 2008, running for a total of 36 months.

More info at:

http://ec.europa.eu/energy/intelligent/contact/index_en.htm



Events

The ELC in the European Parliament

On 27th November, the ELC organized an event in the European Parliament to highlight the benefits of energy efficient lighting among members of the European Parliament and their personnel. The organization of this event was possible thanks to the kind support of Fiona Hall, UK Liberal Democrat MEP (Member of the European Parliament).

The ELC had an information stand that provided information about energy efficient lighting. As well, and thanks to the ELC member companies, a good number of energy savers were freely distributed among the many people that approached us to ask questions and show their interest and concerns about these technologies.

Members of the ELC Board also attended this event: Jan Denneman (ELC President; Philips), Simon Philips (GE), Christian Brehm (Sylvania) and Bernd Lewandowski (Osram).

MEP Fiona Hall has written the European Parliament's report on energy efficiency. Her report was adopted unanimously by the 49 MEPs present in the ITRE (Industry, Research and Energy) Committee. As far as lighting is concerned, this report (available at <http://www.europarl.europa.eu/activities/committees/reports/formSearch.do?language=EN>) contains a reference to market surveillance (asking the Member States to devote more resources to market surveillance), and stresses the importance of the Commission's keeping to the proposed timetable for the withdrawal of the most inefficient light bulbs from the market, in line with the European Council conclusions of March 2007.



Annual meeting of the ELC, AIE and EUEW

The annual meeting between the ELC, AIE (the European Electrical Installers Association) and EUEW (the European Union of Electrical Wholesalers) took place in Brussels on 27th November. The Presidents of the 3 associations (Jan Denneman, Guy Geoffrey and Gilles Deraison, respectively) met to discuss about common issues of interest for the lamp industry and the value chain, wholesalers and installers.

The three associations agreed on deepening their cooperation, using the RoMS network as a precious tool to work together and meet their common challenges. This meeting also served to discuss on the opportunities that the new products that are being launched by the lamps industry, can bring to the installers and wholesalers, namely LEDs and the improvements for GLS lamps. It was agreed that all organisations would set up LED Working Groups to look at how to tackle future opportunities for LED products.

EUEW also mentioned the need of support to fight against counterfeiting support, with a view to getting better information that helps identify counterfeit products.

A next meeting between ELC, AIE and EUEW will be hosted by Osram in Munich, Germany in November 2008.

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