

THE LAMP

2011 ANNUAL REPORT



LETTER FROM THE PRESIDENT

As 2011 has come to a close, and the next decade is fully underway, we can reflect on the busy, productive and exciting year it has been at the ELC--and on the fast moving changes that our industry is embracing and the upcoming ones it must embrace.


As Bob Dylan sang:

*Come gather 'round people
Wherever you roam
And admit that the waters
Around you have grown
And accept it that soon
You'll be drenched to the bone
If your time to you
Is worth savin'
Then you better start swimmin'
Or you'll sink like a stone
For the times they are a-changin'.*

The times are changing and, undoubtedly, the decade ahead will see changes not only across the industry but in the ELC infrastructure as we accommodate the dynamic shifts in technology and markets, while maintaining a proactive leadership role. From an industry perspective, the increasing presence and development of LED and OLED technology can be expected to accelerate. As the EU phase out of general-purpose incandescent bulbs has begun and a shift to more efficient systems occurs, LEDs have the potential to offer remarkable energy-saving, design, and business opportunities. And the ELC and its members must be prepared to respond to these new market needs while anticipating future market trends.

As the ELC welcomed several new members in 2011—and hopes to welcome several more in 2012—we are more poised than ever to bring innovative, sustainable and reliable LED and OLED solutions to the global market. With the addition of these companies, the ELC also hopes to further expand the capacity and expertise of our multiple working groups, which took leadership roles in numerous industry initiatives including: WEEE, market surveillance, SSL lighting, LED and DIM 2.

We look forward to the challenges, opportunities and changes of the upcoming year and have set a solid foundation in 2011 for a successful 2012.


Jan Denneman
ELC President



NEW ELC MEMBERS

In 2011, the ELC was pleased to welcome the following companies as our newest members.



WORKING GROUPS, PARTNERSHIPS, AND PROJECTS

Among our accomplishments in 2011, through our working groups, the ELC has initiated programs, activities, partnerships, and/or green papers in numerous areas.

ESOLi

Intelligent Outdoor Lighting Project ESOLi Thriving

ESOLi (Energy Saving Outdoor Lighting) is a project funded by the Intelligent Energy Europe program of the European Union. ESOLi aims to increase the awareness about intelligent street lighting and intends to accelerate the use of the best available technologies across Europe.

The overall objective of ESOLi is to foster the extended use of adaptive lighting systems and intelligent control in outdoor areas and to remove barriers for a large scale technology roll-out.

Project partners plan to assess energy savings in different settings, to support procurement initiatives, and to speed up the development of legislation and standards.

The ESOLi consortium is composed of 16 partners from 14 European countries. They are street lighting operators (including utilities), energy agencies, local authorities, key actors, industry representatives and consultants.

ELC, as partner and work package leader in the ESOLi project, has been active in realizing its task foreseen under the EU-funded project.

In 2011, the ELC, jointly with a team of experts from its members companies:

- Participated in project meetings in Göteborg (Sweden) and Brescia (Italy).
- Began the preparation of training modules for Lighting Personnel including defining the target and required skills of personnel to be trained that will be used in training road shows throughout Europe.
- Announced the international training session on intelligent outdoor lighting to take place at Frankfurt's Light + Building on 17 April 2012.
- Commenced preparations for Intelligent Public Lighting Workshops intended for the Belgian market, the first of which is to take place on 8 March 2012, in Brussels.

Additionally, the ESOLi consortium has developed a study on the market conditions for the take up of intelligent lighting in Europe and a catalogue of best practices and pilot projects already in place. Those documents are available on the ESOLi website:

<http://www.esoli.org>.

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energy saving
outdoor lighting

Market Surveillance Working Group

One of the top priorities for ELC members is to create an effective industry driven market surveillance system for lamps to assure a level playing field and fair competition. The anticipated Market Surveillance project includes in its scope CLFI lamps, halogen lamps and LED retrofit lamps from different players in the market (producers, importers and/or distributors).

Since compliance with competition and antitrust laws is an integral part of the policy of ELC and all of its members and associated companies, the internal rules of the project shall be transparent, non-discriminatory and objective, and shall ensure that any decisions to test products and prosecute infringements are taken purely on objective and non-discriminatory grounds. There are currently still open questions concerning the exact form of the project due to the involvement of third parties and infringing antitrust obligations. The project partners are in the process of solving these issues and are looking forward to starting the project in 2012.

LED Working Group

The LED Working Group was established to effectively position LED solutions in the public eye and to identify legislative and other opportunities to increase the uptake of LED Light Sources in the context of energy efficient policy discussions as well as other relevant opportunities. One of the primary objectives of the LED Working Group in 2011 and going forward into 2012, is the publication of the EU Green Paper on Solid State Lighting.

This is a formal policy document to the European Commission that sets the SSL roadmap for the next years. It also maps concrete measures and proposals to accelerate the uptake of LED in the European Union and foster leadership potential of the European industry. In July of 2011 the ELC submitted industry input to the Commission which was favorably received. In December of 2011 the Commission published the paper and the stakeholder consultation period will last from January to February 2012.

The LED Working Group is addressing industry priorities in the document. It is anticipated that in April 2012 the Green Paper will be adopted, and the Working Group will determine the best EU SSL platform from which to launch this initiative.

ECOLIGHTING

Eco-Lighting Project

2011 marked the planning phase for a ground-breaking project with EU Ecolabel and Green Public Procurement (GPP) in the criteria revision process. The criteria revision for the product group "light sources," consists of establishing the ecological criteria for awarding the EU Ecolabel and GPP (labels, medals, certification, etc.) for light sources. The first of its kind, this pilot project creates a consortium of industry representatives, NGOs, and associations, in close collaboration with the Joint Research Centre (JRC) of the European Commission in Ispra and Seville and the European Commission's Directorate General for Environment. The project launched in January 2012. For more information, visit the project's website at: www.eco-lighting-project.eu.

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Waste and Electrical and Electronic Equipment (WEEE)

2011 was a busy year for the E-Waste Working Group, led by Zoltan Pilfer, GE. The WG has been following the legislative developments of the revision of the EU Directive on Waste Electrical and Electronic Equipment (WEEE); which included the vote of the European Parliament and the positioning of the Council of Ministers. In the course of the year ELC members, including some Board members, met with representatives of both institutions to bring the perspectives of lamps and the specificities of their collection and recycling to the attention of the decision makers. ELC also liaised with other industrial sectors e.g. IT equipment, white goods, medical devices, and mechanical to develop common positioning and see areas of common position. This resulted for instance in the release of a multi sector common position addressed to European decision makers in July.

By the end of December the Council, the European Parliament and the Commission came up with a compromise agreement drawn up by representatives of the Parliament, the Member States and the European Commission that generally can be qualified as satisfactory from an ELC point of view. The latest vote, in January 2012, confirms a compromise agreement drawn up by representatives of the Parliament, the Member States and the European Commission.

The updated Directive now requires formal approval from the Council of Ministers and will then be published in the Official Journal of the European Union, which will mark its entry into force. The EU Member States will have 18 months to update their national legislation to comply with the changes.

Once approved, the updated Directive will set ambitious recycling targets and clarify financing responsibilities and requirements for collection and recycling operations. The ELC believes the updated Directive will provide for a balanced approach, which gives due consideration to waste management needs and to product and market realities with regard to sustainable financing and effective recycling of raw materials.

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Restriction of Hazardous Substances Directive (RoHS)

The Environment and Technology Working Group (WG ET) is the oldest working group of the ELC and it again left another busy and successful year behind it. The main topic of the year was again RoHS and mercury. As the RoHS directive and the Annex regulating the exemptions became more complex, the implementation of the directive created new questions. Therefore, the Working Group updated the FAQ on the RoHS directive, prepared a position paper that projector lamps are exempted, and submitted an exemption request for long life lamps. Besides this it also participated in a public discussion on dosing technology of compact fluorescent lamps below 30 W. The Working Group took the position that restriction of a dosing technology would restrict the availability of certain lamp features among compact fluorescent lamps - e.g. quick warm up of lamps - without any considerable positive environmental impact, while hindering the improvement of technologies. After considering all the scientific pros and cons, the expert of the European Commission suggested that any lamp dosing technology should be allowed to be used, development of technology should be free, and only the mercury in the lamp counts.

2011 was also the year for the WG ET to step out into the global sphere. The Working Group actively supported the UNEP initiative to regulate mercury globally. As a result, it participated at the International Negotiation Committee meeting in Nairobi, where governments of all continents drafted the text of a new UNEP convention. This new global regulation intends to reduce mercury emission via various measures in products as well as during mining, transport, production, and disposal. The regulation is still in draft form and there are many items to discuss, so in 2012 the governmental negotiations will continue. WG ET will attend the forthcoming meetings and will propose a gradual decrease of mercury content of lamps following the example of the RoHS directive.



Global Lighting Forum To Become Global Lighting Association

2011 marked the initiation of many organizational changes for the Global Lighting Forum as well. During the past year mechanisms were discussed to migrate the GLF to the GLA in 2012.

During the December board meeting in Hong Kong an initial timeline and plan was approved. This new infrastructure will better meet members' needs and industry shifts and will elevate the GLA's global presence and leadership position. Please be sure to check the ELC website for continuous updates.

ELC PEOPLE AND PLACES

In 2011 the ELC moved into an expanded office on the sixth floor of the Diamant Building. In this new space we are better able to accommodate meetings and working groups. We welcome you to stop by anytime you are in Brussels.

The ELC also welcomed Anne Vick as the Communications Manager and, towards the end of the year, Chiara Briatore as a full-time policy analyst.



Chiara Briatore



Anne Vick

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G.E. Lighting Europe Ltd
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