LIGHTINGEUROPE
THE VOICE OF THE LIGHTING INDUSTRY
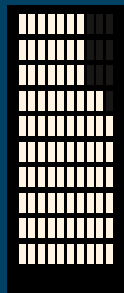
**Strategic Roadmap 2025
of the European
Lighting Industry**

Others see the Lighting Industry mainly as a driver for energy efficiency

Benefits in health and safety for workers are not seen as added value, at best they come for free as part of the energy saving
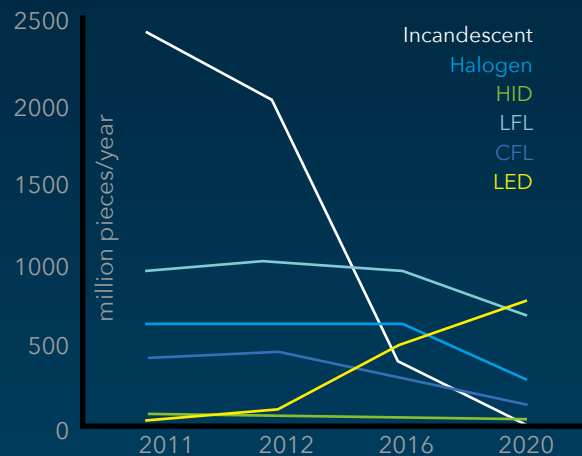
people spend

90%

of their life in buildings

People live and work longer.
Population in EU in 2020 will be

41% > 50 years

212 million out of 514 million people

In outdoor lighting, the focus is on energy efficiency and in some areas on protecting a "dark sky"

Light sources sold in EU-28

million pieces/year

2500
2000
1500
1000
500
0

Incandescent
Halogen
HID
LFL
CFL
LED

2011   2012   2016   2020

Saving Potential

From 60W incandescent to 6W LED retrofit (134 lm/W) we will save 90% in 2018 with current regulations compared to the 2009 situation

Potential future product regulation (134→200lm/W) will save extra 6% (2W), which is less significant

Significant additional savings can be achieved by lighting systems in their specific applications and through clear regulations

Value and jobs

- ▶ Promote "invented and made in EU" thinking

- ▶ Make the manufacturing/R&D climate in Europe more attractive

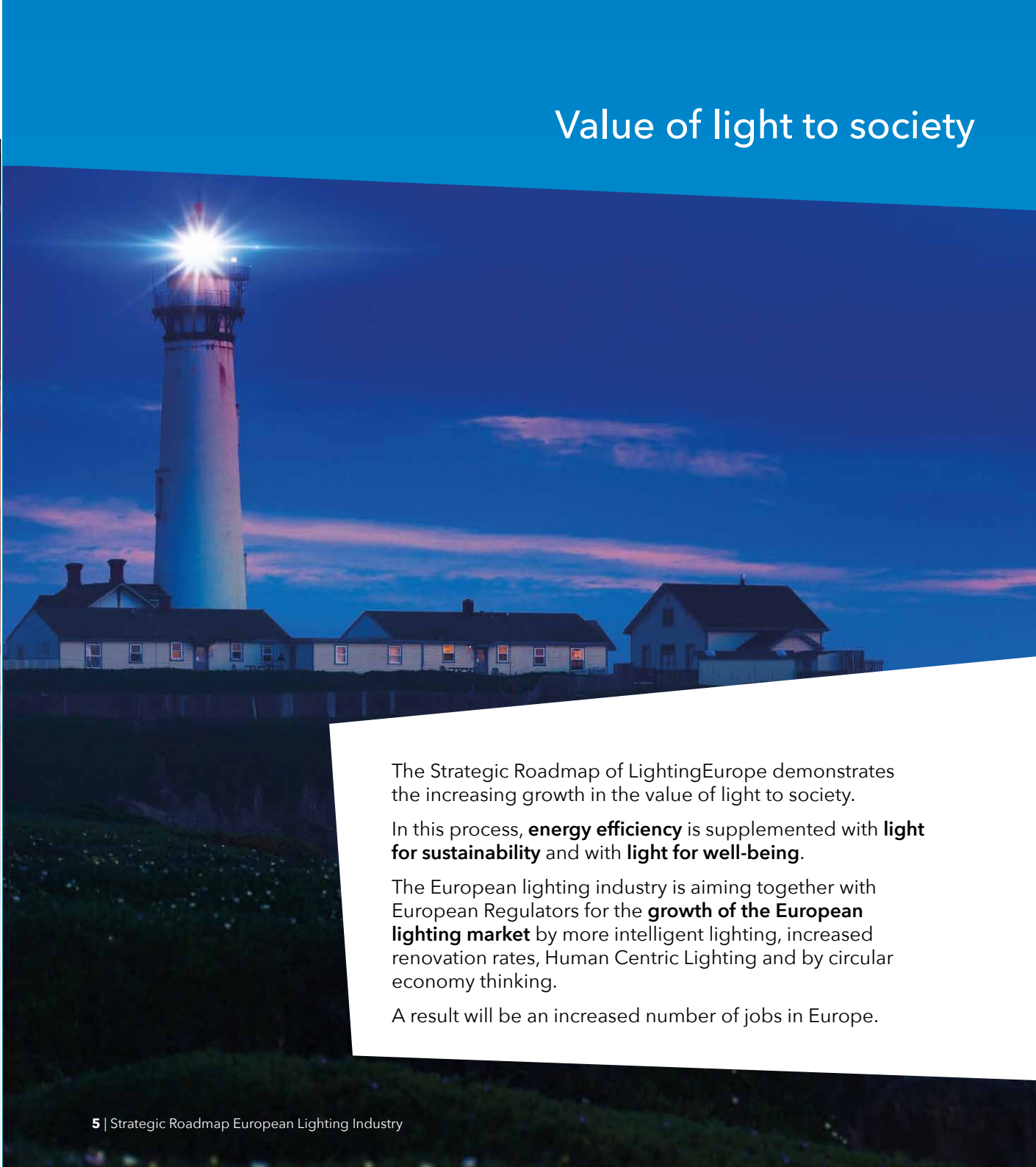- ▶ Develop a trade policy to support industry

Technology leadership

- ▶ The European lighting industry is the world leader in lighting systems technology and in Human Centric Lighting.

- ▶ The EU Commission and member states support the European lighting industry to keep this position

Impact on society

- ▶ Create awareness of the opportunities for improving the well-being of people in buildings and outdoors through Human Centric Lighting and quality of light

Human Centric Lighting

Value of light to society

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.
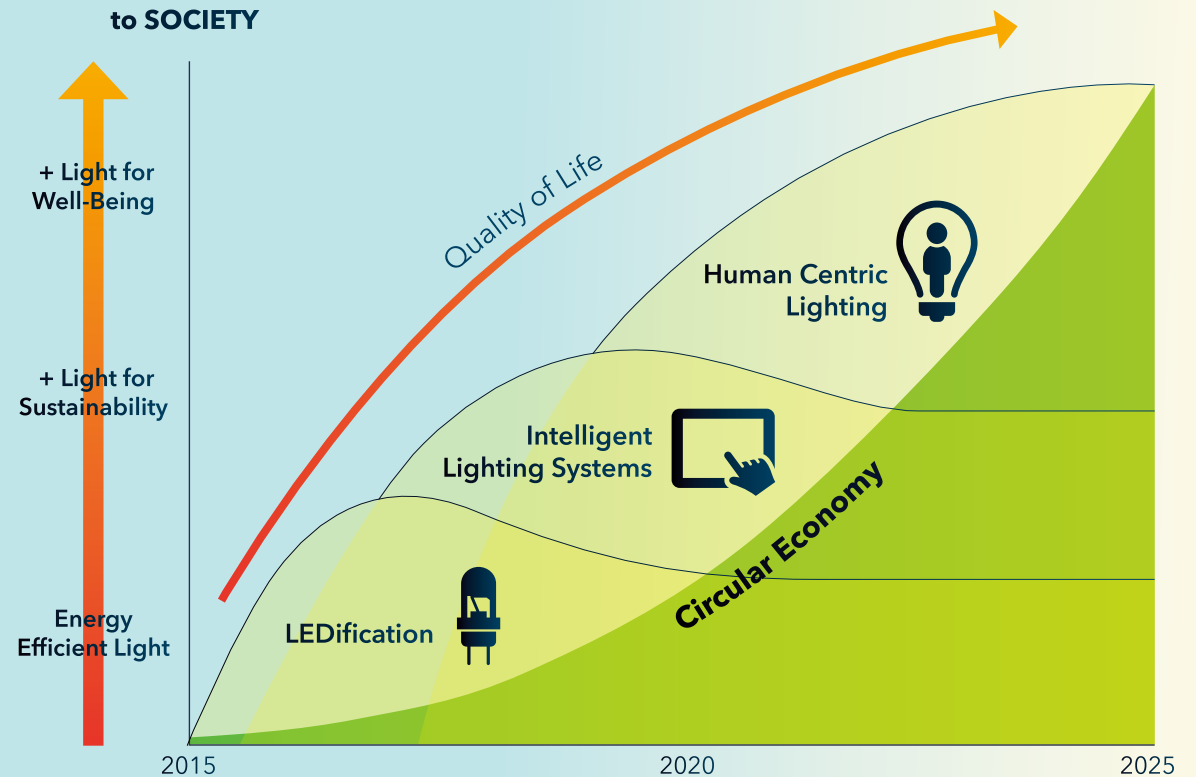
Value of light to society

Light is life! From the earliest stages of life on earth, life has been based on light. For over 100 years, electric light has made it possible to learn, work and live at almost any place and time on earth. Over recent decades, a lot of effort has gone into reducing the energy consumed to make this possible.
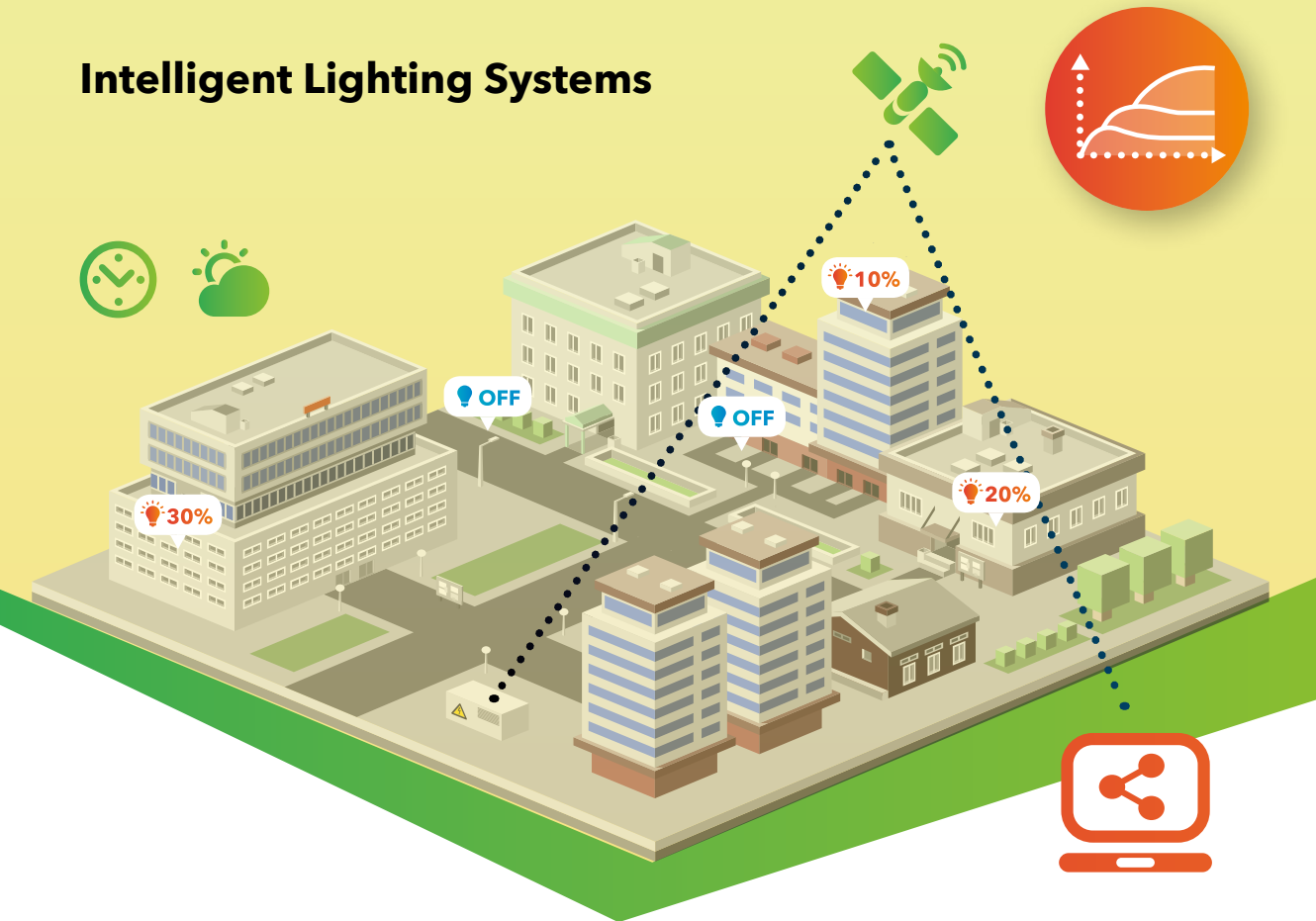
In the coming decade, the development of new lighting systems will enable the properties of natural lighting to increase the quality of life in many daily situations. This will be the case in education, in leisure time, in healthcare, in elderly homes or in business.

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

+ Light for Well-Being

+ Light for Sustainability

Energy Efficient Light

Quality of Life

Human Centric Lighting

Intelligent Lighting Systems

Circular Economy

LEDification

2015   2020   2025

Intelligent Lighting Systems

A lighting system is a holistic one with lighting components plus sensors, controls and also includes the design and installation of the system.

The lighting industry recommends that a lighting system design process specifies the steps for correct lighting system design to secure quality of light requirements prior to the energy calculations, installation, commissioning, operation and maintenance of the lighting system over the years.

The lighting system is a key competence of the lighting industry. It will have standard interfaces to adjacent industries in infrastructure, building management or IT and will allow freedom of business models.
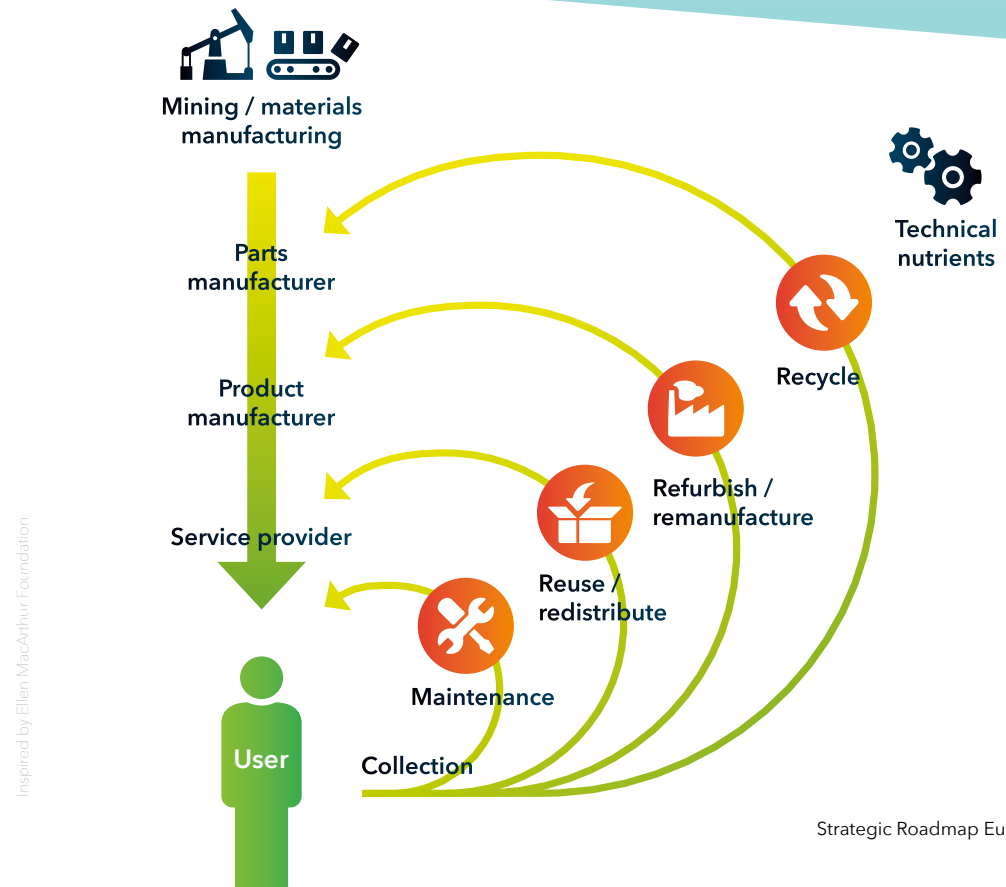
Circular economy

A key objective of the lighting industry is to significantly reduce its environmental footprint.

Progress is being made in the recycling of materials. But the real ambition is to master the next steps on the way to a circular economy:

▶ **To refurbish and remanufacture**
▶ **To reuse and redistribute**

The ultimate goal is the extension of the life-time of the system by servicing and upgrading at the customer's site.

This understanding of a circular economy will change the supply chain. It will have positive consequences for the environment, the economy and society through the creation of jobs.
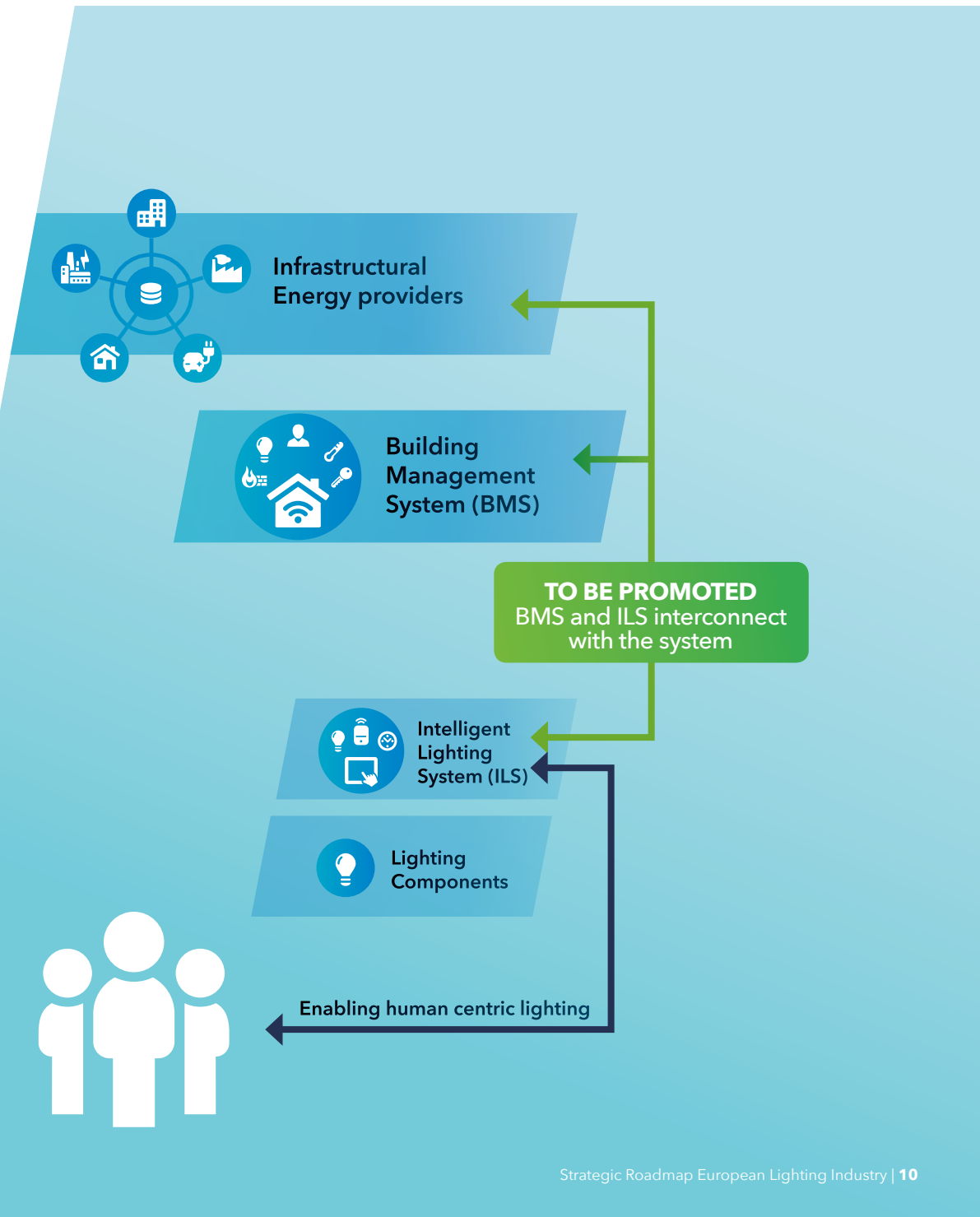
Inspired by Ellen MacArthur Foundation

Mining / materials
manufacturing

Parts
manufacturer

Technical
nutrients

Product
manufacturer

Recycle

Service provider

Refurbish /
remanufacture

Reuse /
redistribute

Maintenance

User

Collection

Intelligent Lighting Systems

▶ 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

Infrastructural Energy providers

Building Management System (BMS)

TO BE PROMOTED
BMS and ILS interconnect with the system

Intelligent Lighting System (ILS)

Lighting Components

Enabling human centric lighting

Human Centric Lighting

▶ Raise awareness of the impact of Human Centric Lighting on the well-being of people; whether they are consumers, employees or students. All users of lighting will benefit in all their daily activities

▶ Stimulate the development of nomenclature and metrics

▶ Develop the notion that lighting is crucial in "healthy buildings"

Relation to EU policy framework

EU Sectoral Strategies (selection)

Innovation	Energy	Environment	Growth

2015

Ledification

▶ Continue to strive for and influence energy efficiency policies

▶ Simplify energy efficiency product regulation via the One Lighting Regulation (1LR)

▶ Develop a determined strategy against poor quality, non-compliant products via market surveillance

▶ Educate stakeholders to guide them from product efficiency to system efficiency

Intelligent Lighting System

▶ Build the relevant partner network, collaboration with allied industries

▶ Enable alliances to cooperate with big construction companies

▶ Lobby for measures for accelerated renovation of lighting installations as part of a wider building stock renovation policy

▶ Publish white papers on what Lighting Systems can deliver

▶ Drive for appropriate interfaces between domains to keep pace with market and technology

2025

Human Centric Lighting

▶ Create an education/marcom package to illustrate the benefits of HCL to consumer, public lighting and indoor lighting applications

▶ Initiate funds to promote the view of the European lighting industry

▶ Reposition outdoor lighting away from energy efficiency into the intelligent arena

▶ Establish working relationships with the relevant DG's in the Commission

▶ Work with strategic alliances including building management alliances and rating initiatives

▶ Work with NGOs to promote the benefits of the right light at the right place at the right time

▶ Influence regulatory bodies and processes to get requirements for lighting for aging people & human centric lighting in regulations

▶ Increase the use of application standards through referencing them in regulations

▶ Promote the added value of quality of light to consumers, decision makers and policy makers and make the link with the 10 EU priorities

▶ Create or support creation of a white paper on "HCL improves health and well-being"

Introduction to LightingEurope

LightingEurope is the association that represents the lighting industry in Europe.

We are the voice of more than 1000 lighting companies who employ more than 100000 people throughout Europe and turning over in the region of 20 billion Euro.

Our daily mission is to promote the interests and values of the lighting industry in Brussels while reconciling it with ongoing EU policy aims. In doing so, we are dedicated to promoting efficient lighting practices for the benefit of the global environment, human comfort and the health and safety of consumers.

+1000
lighting companies

+100 000
people employed over Europe

€20 billion
annual turnover

Conclusion

The growth drivers for the European lighting market are **lighting systems**, **better quality of lighting**, **Human Centric Lighting** & a **circular economy**.

LightingEurope will create an understanding of the added value of these growth engines for society, policy makers and all relevant stakeholders in the lighting and adjacent industries.

LightingEurope will determine the conditions under which these growth drivers will enhance the growth of the European industry. Examples are stimulation packages and the initiation of voluntary standards.

LightingEurope has the ambition to create a regulatory framework that improves the quality of lighting and thereby the quality of life. This framework will foster freedom of innovation and deliver a broad range of opportunities for the lighting industry.

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For further information

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