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## ASSOCIATIONS

**AREI - South Africa**

Association of Representatives for Electronics Industry

**ASPEC - Russia**

Association of Suppliers of Electronic Components

**ASSODEL - Italy**

Associazione Nazionale Fornitori Elettronica

**CEDA - China**

China Electronics Distributor Alliance

**ECAANZ - Australia**

Electronic Components Association Australia and New Zealand

**ECIA - United States**

Electronic Components Industry Association

**ECSN - United Kingdom**

Electronic Components Supply Network

**ELCINA - India**

Electronic Industries Association of India

**FBDI - Germany**

Fachverband der Bauelemente Distribution

**FEDELEC - Tunisia**

Tunisian Federation of Electric and Electronic Industries

**SE - Sweden**

Svensk Elektronik Trade Associations

**SPDEI - France**

Syndicat Professionnel de la Distribution en Electronique Industrielle

# New EU Privacy Legislation creates Industry confusion...

by Adam Fletcher

Chairman of IDEA and ECSN

[www.ecsn-uk.org](http://www.ecsn-uk.org)



The European Convention on Human Rights (ECHR) came into effect in 1953. This laudable legislation protected the basic human rights of a citizen of the European Union and provided the fundamental right to have their private life respected. Much of the legislation was drafted to protect the individual from the state sponsored tyranny that many had in recent history endured.

## CONVENTION 108

Article 8 of the ECHR identified the need to safeguard individuals by protecting their **personal data**. This requirement was brought to the fore by the information technology explosion of the 1960s and 70s, and in 1981 led directly to the signing of a Convention for the protection of individuals with regard to the automatic processing of personal data. Convention 108 remains the only legally binding international instrument in the data protection field and applies to all data processing carried out by both public and private sector organisations. It protects the individual against abuses that could be occasioned by the collection and use of personal data and importantly, regulates the flow of this information across

On the 6<sup>th</sup> October '15 the European Court of Justice struck down a US based Safe Harbour Agreement on the electronic transfer of personal data on the grounds that it compromised respect for the private life of the individual. This ruling has caused confusion and some alarm in the electronic components industry where significant international transfer of data is a routine and frequent occurrence.

In this article Adam Fletcher provides an insight into this legislation, reviews why it is a cause of concern and suggests how organisations should proceed

international borders. A public consultation exercise in 2011 led to the reinforcing of privacy in the digital area and strengthened Convention 108's follow up mechanisms. Sadly Convention 108 has had little adoption outside Europe despite being drafted as an international regulation.

**“ The majority of organisations operating within the electronic components supply network trade pass information between their organisation and their partners in support of their business operations ”**

## THE DATA PROTECTION DIRECTIVE

The **Data Protection Directive** (which overrides local EU Member country legislation) was adopted by the European Parliament and Council in 1995. Designed to harmonised data protection legislation across the EU - and also into member states within the European Economic Area - the Data Protection Directive encompassed much of Convention 108 and has been reinforced by subsequent Directives which provide greater clarity and balancing of interests



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in the processing of personal data, protection of privacy and how long data may be retained.

#### **"ADEQUACY" AND SAFE HARBOUR**

To enable the free flow of data to third party countries organisations need to satisfy the European Commission "Adequacy" criteria, which seeks to respect different countries ways of implementing data protection. A very important "Adequacy" decision does not relate to a set of legal provisions but concerns rules, much like a code of conduct known as "Safe Harbour Rules" negotiated between the EU and the US for their government agencies and commercial organisations.

A US organisation voluntarily commits to US Commerce Department and is documented in a list published by them and regulated by the US Federal Trades Commission. There has long been legal concerns about this Safe Harbour agreement, which is regarded by some regulatory authorities as a "merely a tick list with few controls". In contrast, the European Commission finding of "Adequacy" in the legislation for a certain country is binding on all member states.

#### **EDWARD SNOWDEN**

Most citizens accept that in exceptional circumstances governments need to monitor the activities of individuals or small groups of individuals in breach of legislation. Most concerned people do however expect strong independent judicial review and control of

these activities. The impact of Edward Snowden's revelations of "industrial-scale" flouting of data protection legislation by UK and US government agencies on citizens, organisations and third party countries caused an understandable public outcry and demands for a review of their activities. However, it also prompted concern over the wider use of private data by large organisations, particularly those based outside the jurisdiction of the EU.

***" National authorities within the EU do have the right to independently examine firms which transfer personal data across the Atlantic "***

An individual's complaint to the highest Court in Europe that Facebook was breaching his privacy, resulted in a verdict handed down by the European Court of Justice that *"legislation permitting [American] public authorities to have access on a generalised basis to the content of electronic communications must be regarded as compromising the essence of the fundamental right to respect for private life."*

The ECJ judges also ruled that national data-protection authorities within the EU do have the right to independently examine firms which transfer personal data across the Atlantic. In its statement the court failed to make mention of a grace period, which would have



enabled companies to adapt to the ruling and eliminated much of the legal uncertainty and additional concerns for organisations operating internationally outside of the EU.

## AN INDIVIDUAL OR NOT AN INDIVIDUAL?

The way that the legislation is drafted suggests that an individual is always an individual if they can reasonably be identified within the correspondence. In practice, however it is generally accepted there is a difference between someone operating as an individual person rather than as a representative of another legal entity.

If "Mr John Smith, 25 The High Street, Anytown, United Kingdom." pays for purchases on his personal credit card, he must be considered as an individual within the scope of this legislation. If however "Mr John Smith - Buyer, ElectronicBitz Ltd, Unit 1 the Industrial Estate, Anytown, United Kingdom" places orders against a trade account on agreed credit payment terms it seems reasonable that he is considered as part of a separate legal entity and therefore not in scope. This is however a personal opinion based on my experience and may not prove to be a correct interpretation of the legislation.

## IMPACT ON THE ELECTRONIC COMPONENTS SUPPLY NETWORK

Many US based organisations are concerned about the threat of even more stringent legal

barriers being erected against the flow of data between the EU and US. Such barriers are likely to impact mid-sized US companies operating in Europe, whose customers are primarily individuals and where their primary IT transactional and storage systems are based outside the US.

***" Usually, authorized distributors have almost no individuals as customers, while high service/catalogue distributors hve a great number of individuals as customers "***

The vast majority of organisations operating within the electronic components supply network trade internationally and routinely pass information between their organisation and their partners in support of their business operations. These organisations are predominantly involved with Business to Business (B2B) transactions and are therefore not so exposed to the scope of this legislation, beyond protecting the personal data of their employees, customers and partners, which in any case they should already be doing.

**Authorised Distributors** have the largest number of both suppliers and customers. Most high volume authorised distributors are primarily involved in B2B transactions for greater than 99.9% of their sales revenue and have almost no individuals as customers.

In contrast, **"high service/catalogue" distributors** have a larger exposure

to named individuals as customers (rather than organisations) and will need to manage their data and its storage appropriately if they are to remain compliant with the legislation.

## FURTHER THOUGHTS

Organisations might already be falling foul of existing legislation without realising it. Some of the areas worthy of significant further thought include:

- **Social Networks and Communities** - Is your organisation engaging with an individual or a separate legal identity as its members? If you are employing staff to communicate and manage the "conversations" on these networks how do you ensure the information they collect is protected?
- **Cloud Storage/Software as a Service** - How are you managing an individuals' data once it's moved into a cloud storage solution or outside the EU?
- **Your Organisations Data** How secure is it? Has your organisation taken all reasonable process steps to secure it?

## CONFIDENTIALITY

Generally speaking, organisations in the electronic components supply network

treat customer information with great care. They recognise its sensitivity and know that any breach of confidentiality would undermine its commercial value.

I'm not aware of any practices or processes used in the electronic components supply network that have caused any concerns over the protection of data of the individual (or the individual within what is generally considered a separate legal entity) but if there are additional steps that our industry needs to take to ensure compliance with the legislation and retain our customers confidence, these steps will be quickly completed.

I've no doubt that the legal community stands ready to provide us with all the advice we need, probably accompanied by a hefty invoice. Regardless of the legal outcome, EU commercial operations trading in the physical world will not benefit from a trade dispute with the US caused primarily by dispute with organisations operating in a virtual world.

Legal disputes of this nature rarely get resolved quickly so my best advice to all in the electronic components supply network is to double check your systems for compliance to existing privacy legislation and then carry on as normal.



# Q3 2015. Normally a weak quarter, but not this time!

by Gary Kibblewhite  
www.ideaelectronics.com



## Quarterly summary Q3 2015

### TWO ADDITIONAL EUROPEAN COUNTRIES ADDED TO THESE STATISTICS!!

With effect from this quarter the IDEA statistical service is including two new countries into their statistics, Switzerland and Austria, both supplied by FBDI the German trade body.

To ensure that statistical integrity has been maintained, detailed quarterly data for both Austria and Switzerland going back to Q1 2013

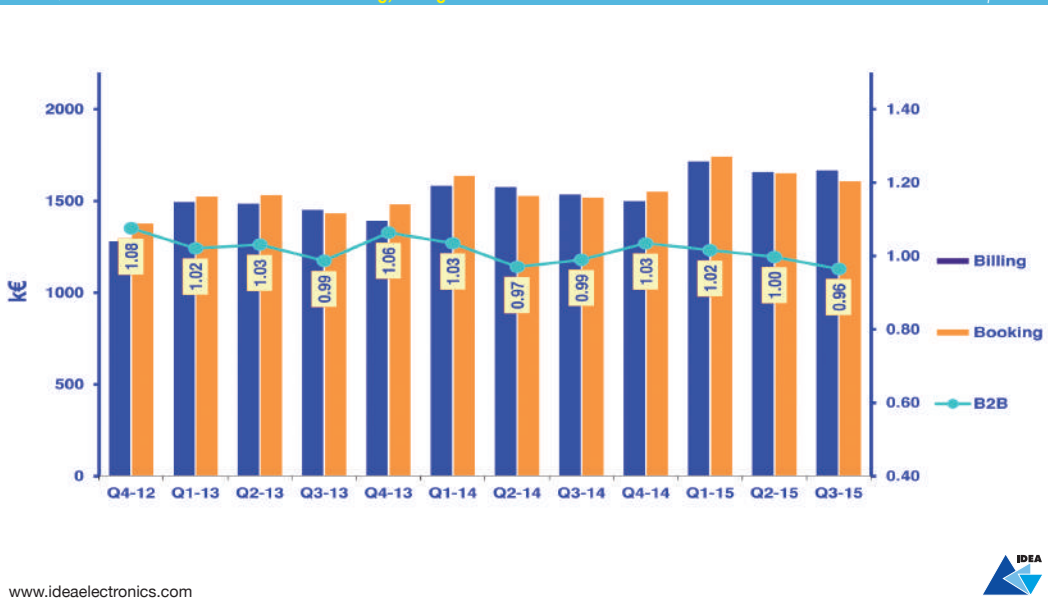
has been included in these statistics. This means that the trends shown truly reflect both current and historical market movements.

*revives manufacturing. This is just the beginning of a long recovery for the West after five years of post-crisis blues. We've turned bullish,"* says **Lombard Street Research**.

Let us hope that Lombard Street Research are correct in their forecasts!

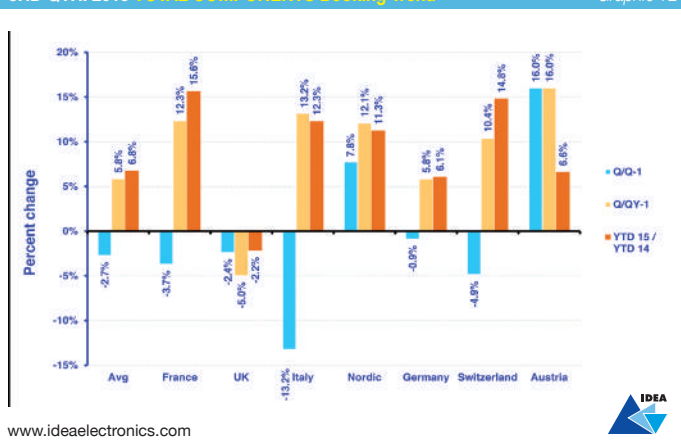
3RD QTR. 2015 TOTAL COMPONENTS Booking, Billing & Book : Bill ratio

Graphic T1



3RD QTR. 2015 TOTAL COMPONENTS Booking Trend

Graphic T2



## QUARTERLY SUMMARY

A good introduction to this quarter's market summary is the recent headline "The recent Global recession scare fades as stimulus

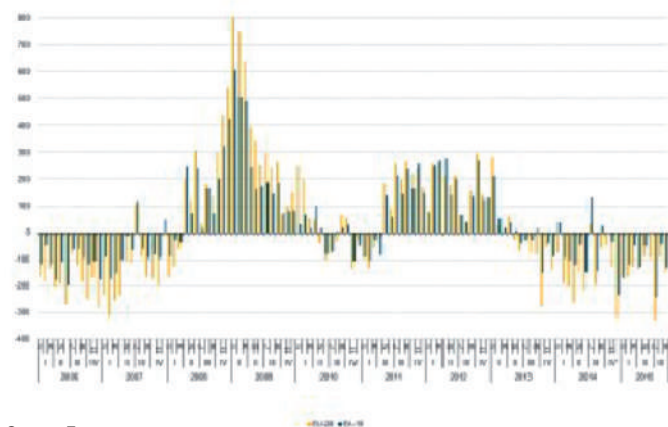
3RD QTR. 2015 TOTAL COMPONENTS Billing Trend

Graphic T3



## EUROPEAN UNEMPLOYMENT

Graphic A



Source: Eurostat

**“ With effect from this quarter the IDEA statistical service is including two new countries into their statistics, Switzerland and Austria ”**

This appears to be displayed in *Graphic T1* of these statistics as, most unusually, the total European 3<sup>rd</sup> Quarter billings are greater than the second quarter! This is the first time this has happened since 2010.

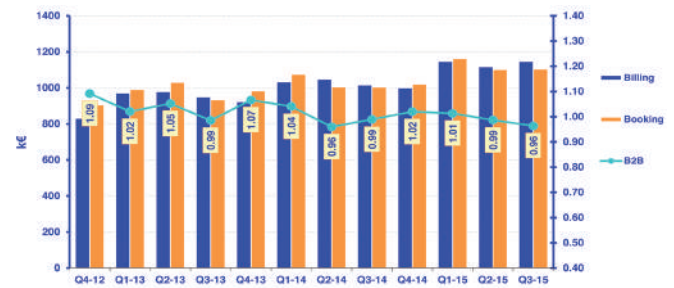
We must not ignore the Euro/Dollar effect (in last quarter's Newsletter we noted that the Euro has declined **18.6%** against

the US Dollar ytd June 2015 against ytd June 2014.) But, nevertheless, the billings increase is very important! The billings trend by country in *Graphic T3* shows that all regions apart from the UK are showing a strong billings growth on a year-to-date basis compared with last year. Italy, Nordic, Switzerland Austria and France are all showing a 10% plus growth.

The bookings trend by country in *Graphic T2* shows that, as expected, Italy is showing the largest drop in bookings when compared with the prior quarter and Austria

## 3RD QTR. 2015 SEMICONDUCTOR bookings, billings & book:bill ratio

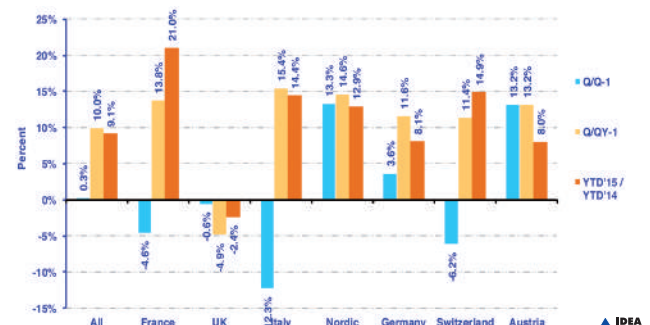
Graphic S1



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## 3RD QTR. 2015 SEMICONDUCTOR Booking Trend

Graphic S2



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is showing the largest growth%..

## ECONOMIC BACKGROUND

*Graphic A* ( source Eurostat) shows the change in the number of unemployed persons in the European Union (compared to previous month, in thousands), seasonally adjusted, January 2006 - September 2015.

**“ We’ve turned bullish” says Lombard Street Research ”**

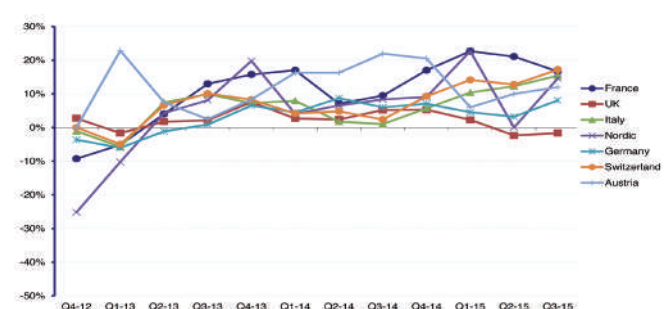
This is an excellent visual representation showing just

Just to remind readers. If you would like to have the original graphics used in this article just email to the IDEA secretary at [segreteria@ideaelectronics.com](mailto:segreteria@ideaelectronics.com).

The IDEA statistics are taken from actual bookings and billings returns made by a substantial percentage of the electronic component distributors in Europe, including all the major distribution groups. Their sales represent over 66% of the total European electronic component distribution market so the trends shown are truly representative.

## 3RD QTR. 2015 TOTAL COMPONENTS TENDENTIAL INDEX BY COUNTRY(Q.QY-1)

Graphic T6

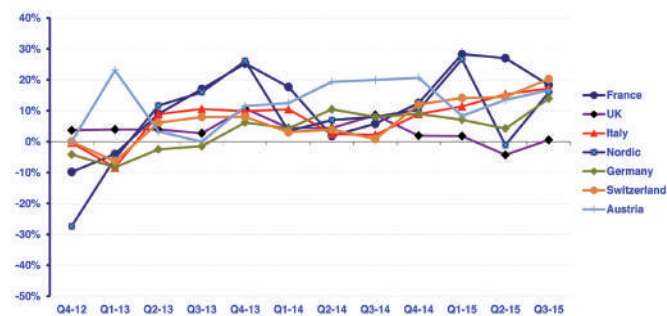


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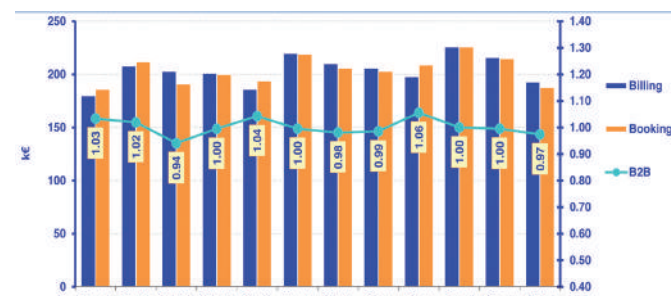
3RD QTR. 2015 SEMICONDUCTOR TENDENTIAL INDEX ( Q/QY-1) Graphic S6



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3RD QTR. 2015 PASSIVES booking, billing & book:bill ratio Graphic P1



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how much unemployment has changed in 2013,14,and15 when compared with 2011 and 2012.

All other European regions are trending positively.

## ELECTRONIC COMPONENT SALES IN Q3: OVERVIEW

### Total components

When looking at billings in the tendential index shown in *graphic T6*, the main area for concern is the UK with the lowest growth.

## QUARTERLY SALES BY PRODUCT FAMILY

Each quarter we look at both booking and billing trends by both product and by market.

### Semiconductors

*Graphic S1* covering semiconductors shows that, once again, semis are the

primary driver for growth. Both bookings and billings for semis was higher in Q3 than Q2 despite the holiday periods included in Q3.

Sadly the book:bill ratio has dropped for the 3<sup>rd</sup> quarter running but, at 0.96:1.00, this should not precipitate a problem for Q4.

**“ Once again, semis are the primary driver for growth ”**

*Graphic S6* shows that whilst Nordic experienced a large drop in semi billings the second quarter, there has been a recovery in the 3<sup>rd</sup> with all regions apart from France showing an improvement when compared with Q2.

### Passive Components

*Graphic P1*, which covers passive components shows that this quarter, passive components are out of step

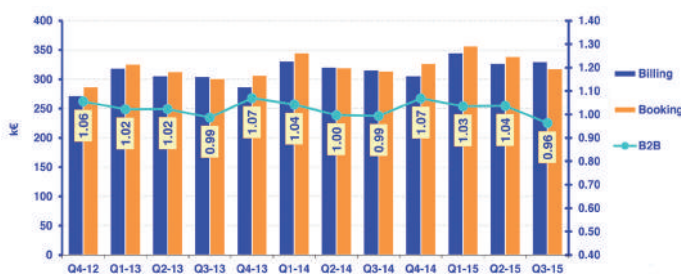
with the other product sectors and shows a further big drop in both bookings and billings.

The regional *graphic P6* shows the reason for the large drop in passive component revenues with the largest market, Germany, showing a steep decline.

### Electromechanical Components

*Graphic E1* covering electromechanical components shows that book:bill ratio has dropped to below 1:1 for the first time since Q3 last year. However, the reason for this decline is partially shown in *Graphic E6* and is as a result of the inclusion of Austria in the stats as they have posted a reduction in Emech billings for the last three quarters.

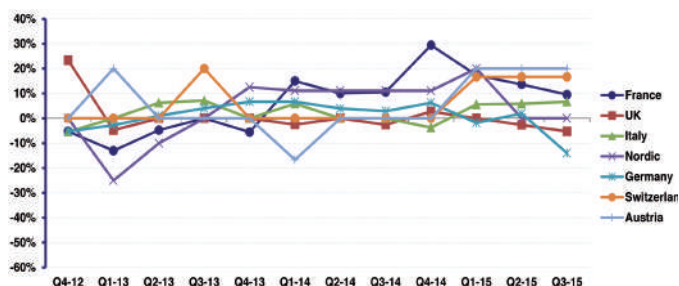
3RD QTR. 2015 EMECH COMPONENTS booking, billing & book:bill ratio Graphic E1



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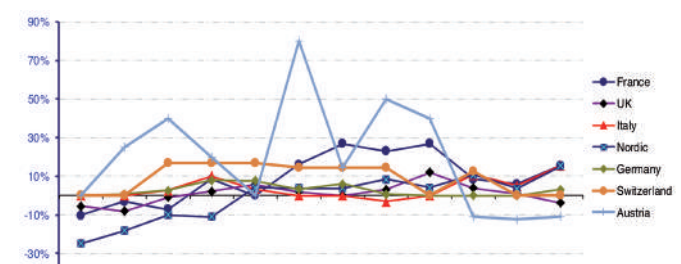
3RD QTR. 2015 PASSIVES TENDENTIAL INDEX BY COUNTRY( Q/QY-1) Graphic P6



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3RD QTR. 2015 EMECH TENDENTIAL INDEX BY COUNTRY( Q/QY-1) Graphic E6



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# In tech we trust...

## Should we trust trends or rather not?

by Wolfram Ziehfuss  
Executive Director  
FbDi e.V.  
[www.fbdi.de](http://www.fbdi.de)



### How do determine that there is a trend?

Trends develop slowly but consistently, like a sandstorm or an avalanche. A developing trend is shown by increased media coverage and events on the topic, such as **big data** and **Industry 4.0** at present. To bring the complexity of the topic closer to its target group, the topics are broken up into bite-sized chunks – Manufacturing 4.0 or Logistics 4.0. This is the point when the trend begins to change our everyday lives.

### If Industry 4.0 has arrived, what do you believe to be the next trend on the horizon?

**Artificial intelligence (AI)** has been a topic of discussion for some time as the next step of Industry 4.0, usually in the sociological community. After all, the core question is whether learning or thinking machines can take on the jobs of trained professional people. Consider the robots in incoming goods departments that categorise the goods, or the customised

home robots that are revolutionising our day-to-day lives. *How can we know now whether machines can become able to learn independently? And in which direction would our society evolve when shared with thinking robots?*

From a technical perspective, as **Toby Walsh** from the **Future of Life Institute** explained, the discussion about AI has advanced a great deal, specifically in the field of autonomous weapons such as drones, which are ready for deployment within years – instead of decades.

### So artificial intelligence is dangerous?

Not necessarily, but scientists such as **Stephen Hawking** and IT entrepreneurs such as **Elon Musk** have warned against making technology independent. Human curiosity is what drives research – we achieve whatever is possible. And this is irrespective of whether the results are positive or not.

Even if not all applications are dangerous, they are still based on the data of human users, which can for example be collected over the internet (Google) and analysed. There was a reason why **Eric Schmidt** (2014) considers AI to be the “*biggest thing for Google*”.

### Will AI automatically be finding its way into our living rooms with the now-ubiquitous internet?

User data is used to optimise the algorithms - the basis of any AI. The quality of these algorithms determines the advantage that an organisation has over its competition. And it helps to build **user trust**. Just a few years ago, the first robotic dog caused an uproar, now test robots are marching through Europe. According to **Gottlieb Duttweiler Institute**, the more we interact with technology and the more reliably it works, the more we trust in it. The more complex the system, and the less we understand the underlying technical infrastructure upon which our lives depend, the more important it becomes for us to trust it. This shows how the need for trust constantly grows in a complex society. We're doomed to trust.

### So we trust in the button or in the mouse?

Exactly - we have to trust **algorithms**. And essentially, we already do that every time we select something in a search engine, go online shopping, read or write blogs, or even when we listen to music online. We assume that we're receiving the right information. What happens to the data that we leave behind is initially not apparent to us, and most

probably don't care – we trust! How is that linked to the distrust towards data collectors? Data theft or abuse, industrial espionage have been criticised in the media. The reactions to it have been a surprise in all areas – ranging from ambivalent to submissive.

### What does this mean for the industry? To what extent do trends such as big data, Industry 4.0 or AI drive business?

For the **electronics industry** and its distribution, there is long-term business potential here. Sensors, embedded systems, motor control systems, opto, power management, systems-on-a-chip, wireless technology and software are all expected to see sustained growth. After all, data collection, thinking machines, robots, drones are based on electronics - that's what makes the industry a winner. That's why all that's left to do is focus on the trends, because as with any megatrend, the expected countermovement will be weak. The alternative of “unplugging” is unrealistic – private individuals may possibly achieve this at best. This is where the submissiveness comes into play, but this is not really a helpful trend.



# The market for Automotive Connectors

by Ron Bishop  
Bishop & Associates  
www.bishopinc.com



The market for automotive connectors has been outstanding in recent years. Pent up demand for new cars, which resulted from the Great Recession, initially drove the market in the early years of this decade. This was coupled with the growing use of electronics in passenger cars, for everything from engine and transmission controls to navigation and entertainment to safety systems, which all required more connectors per vehicle. The market for automotive connectors grew

at an 11% compound annual rate from 2009 to 2014 and reached almost \$12 billion in value.

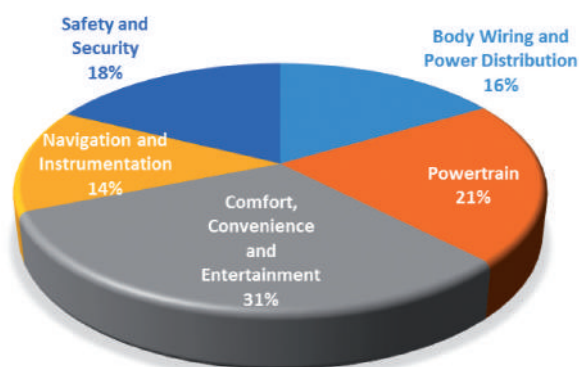
The graph in *Chart 1* displays the automotive connector market by region of the world. The share is determined by the value of the connectors consumed in each region.

***“The market for automotive connectors grew at an 11% compound annual rate from 2009 to 2014”***

As can be seen in the above graph, Europe has the largest market share at nearly 35%. Europe is followed by North America and China in size.

2014 AUTOMOTIVE CONNECTOR VALUE BY VEHICLE ELECTRICAL SYSTEMS

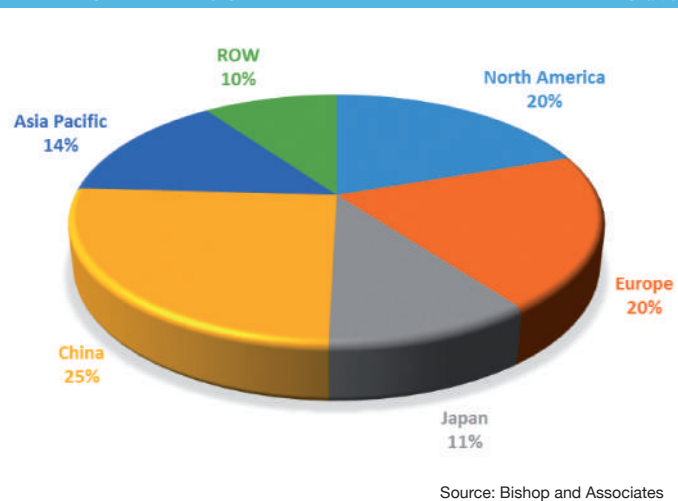
Chart 2



Source: Bishop and Associates

2014 WORLDWIDE LIGHT VEHICLE PRODUCTION IN UNITS MARKET SHARE BY REGION

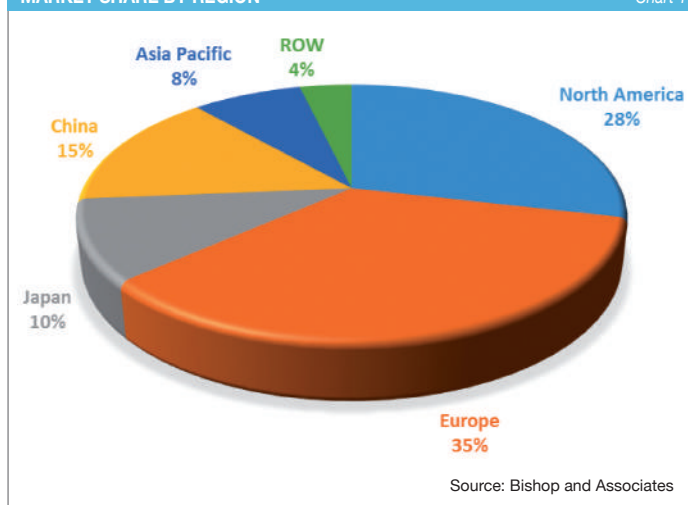
Chart 3



Source: Bishop and Associates

2014 WORLDWIDE AUTOMOTIVE CONNECTOR MARKET MARKET SHARE BY REGION

Chart 1



Source: Bishop and Associates

Bishop and Associates breaks down automotive connectors into five vehicle electrical systems:

1. **Body Wiring and Power Distribution;**
2. **Powertrain;**
3. **Comfort, Convenience and Entertainment;**
4. **Navigation and Instrumentation;**
5. **Safety and Security.**

The worldwide market is summarized in *Chart 2*.

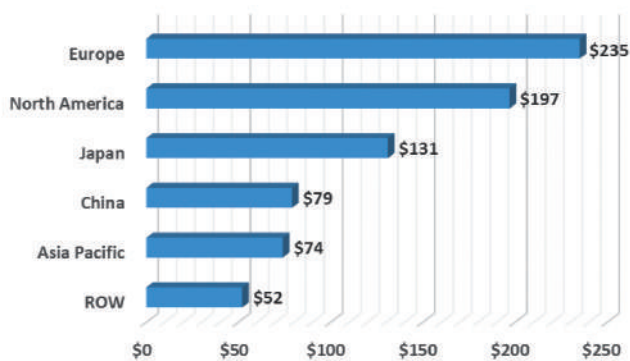
As seen in the graph, Comfort, Convenience and Entertainment has the greatest value and represents 31% of the total connector value in the average car. Navigation and Instrumentation represent 14% of the overall value.





2014 AVERAGE CONNECTOR CONTENT BY VEHICLE BY REGION

Chart 4



Source: Bishop and Associates

with 25% of the global production in 2014. Europe and North America follow at 20% each of the market.

**“China will have the highest CAGR at 7%”**

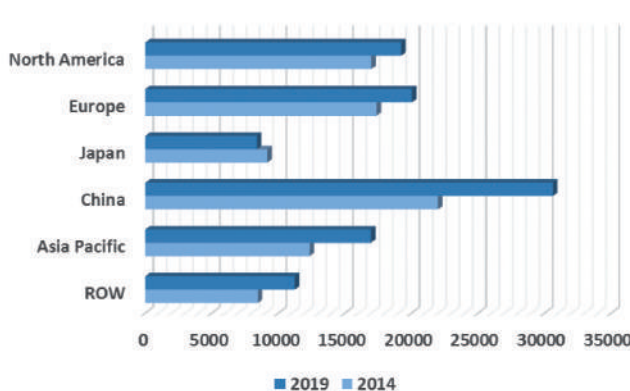
Quick analysis of vehicle production and connector market data by region suggests the average connector content in 2014 was **\$136.00 per vehicle**. Further analysis indicates the number varies widely by region of the world, as is illustrated below:

The *Charts 4 and 5* shows the projected growth in unit volume of light vehicles. The market is projected to grow from 86 million units in 2014 to **106 million units** in 2019. This is an average compound annual growth rate (CAGR) of 4%. China will have the highest CAGR at 7%. Japan's production will contract during this timeframe at a -2% CAGR.

As seen in *Chart 6*, the connector content of the automotive market sector is expected to grow to over \$16 billion in 2019 with a CAGR of 6.5%. If you would like to see more information on the market for automotive connector, our recently released report can be seen online searching **The World Automotive Connector Market**.

2014 WORLDWIDE LIGHT VEHICLE PRODUCTION IN UNITS 2014 TO 2019 GROWTH

Chart 5



Source: Bishop and Associates

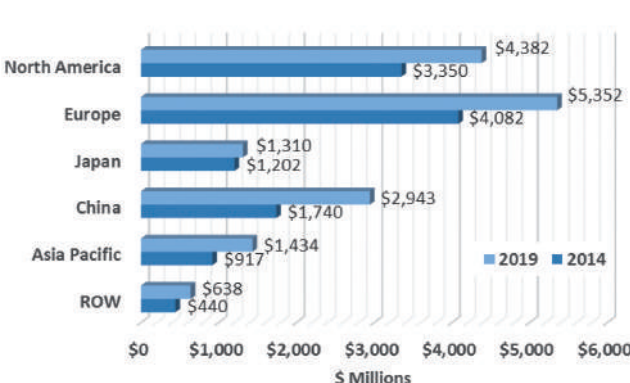
The graph in *Chart 3* shows the worldwide production of light vehicle by region. In 2014, according to PWC Autofacts, LMC Automotive, and Bishop & Associates,

there were **86,245,000 light vehicles** produced.

China has become the largest producer of light vehicles, since the Great Recession,

WORLDWIDE AUTOMOTIVE CONNECTOR MARKET 2014 TO 2019 GROWTH (\$ MILLION)

Chart 6



Source: Bishop and Associates

## EID NEWS MARKET

- **Toshiba** has undertaken a fundamental restructuring of its system LSI business and discrete semiconductor business. In parallel with the structural reforms, the Japanese company proposes to implement an early retirement incentive program for personnel in the sales and staff departments.

- **Integrated Device Technology** announced an agreement to acquire privately held ZMDI (Zentrum Mikroelektronik Dresden) for total consideration of \$ 310 M in cash.

- **EnSilica**, an independent provider of semiconductor IP, custom ICs and design services, has established a new regional office and design centre in Bristol (UK) to complement its existing headquarters facility in Wokingham (UK), and verification centre of excellence and design centre in Bangalore (India).

- **Harting** appoints Andreas Conrad as senior vice president operations. He succeeds Torsten Ratzmann which will leave the Harting Technology Group of his own accord by December 31, 2015

- **TDK** and Hutchinson Technology have entered into a definitive merger agreement under which TDK will acquire all of the outstanding shares of common stock of HTI. The merger values HTI's equity at approximately \$ 126 M to \$ 140 M on a fully diluted basis.

- **Avnet** 'sales for the quarter ended October 3, 2015 increased 1.9 percent year over year and 8.4 percent in constant currency to \$ 6.97 billion. Avnet reported net income of \$ 130.3 M, compared with net income of \$ 127.9 M in the first quarter fiscal year 2015.



# Anti-Counterfeiting DFARS modifications

by Robin Gray  
President and CEO ECIA  
rgray@eciaonline.org



The U.S. Department of Defense (DoD) published on Sept 21 proposed amendments to the Defense Federal Acquisition Regulation Supplement (DFARS) regarding the detection and avoidance of **counterfeit electronic parts** (DFARS Case 2014-D005). The proposed amendments modify and expand previous rules implementing the NDAA of FY2012 in the areas of **definitions, traceability and coverage.**

**“Regarding traceability, contractors would be required to use risk-based processes that consider the consequences of failure of the electronic part”**

The proposed **definitions** would:

- Revise the definition of “electronic part” by removing reference to embedded software or firmware.

- Add the term “*original manufacturer.*” “Original manufacturer” would be defined to include previous defined terms of: “*contract electronics manufacturer,*” “*original component manufacturer,*” and “*original equipment manufacturer.*”
- Add the term “*authorized dealer,*” defined as “*a supplier with a contractual arrangement with the original manufacturer or current design activity, including an authorized aftermarket manufacturer, to buy, stock, re-package, sell and distribute its product lines.*”
- Add the term “*trusted supplier,*” which would include four categories:

1. The original manufacturer of the part
  2. An authorized dealer for the part
  3. A supplier that obtains the part exclusively from the original component manufacturer of the part or an authorized dealer
  4. A supplier that a contractor or subcontractor has identified as a trustworthy supplier using DoD-adopted counterfeit prevention industry standards and processes, including testing.
- The comments section of the proposed rule notes that

“authorized dealer” does not equate to “authorized reseller.”

Regarding **traceability**, contractors would be required to use risk-based processes that consider the consequences of failure of the electronic part. These processes must track the part from the original manufacturer to the product acceptance by the government.

**“Regarding expanded coverage, contractors would be required to flow down all requirements to all tiers”**

If the contractor is unable to establish traceability, then the contractor must complete “*an evaluation that includes consideration of alternative parts or utilization of tests and inspections commensurate with the risk.*”

The evaluation would consider the following factors:

1. The probability of the part being counterfeit;
2. The probability that testing will detect a counterfeit;
3. The consequences of a failed part.

The original manufacturer and authorized dealer appear to be excluded from these requirements.

Regarding expanded **coverage**, contractors would be required to flow down all requirements to all tiers. In addition, the requirements would apply to COTS parts.

The proposed rule clarifies and expands the circumstances under which contractors and subcontractors at all tiers may buy electronic components.

- For parts in production or available in stock, the parts must be bought from:

1. The original manufacturer of the part;
2. The original manufacturer’s authorized dealers;
3. Suppliers that obtain such parts exclusively from the original manufacturers of the parts or their authorized dealers.

- For parts NOT in production or not currently in stock, the parts may be bought from suppliers identified by the contractor or subcontractor as trusted suppliers, provided:

1. The contractor uses established counterfeit prevention industry standards and processes, including testing, for identifying trusted suppliers;
2. The contractor or subcontractor assumes responsibility for the authenticity of the parts obtained from the trusted supplier;
3. The selection of such trusted suppliers is subject to review and audit by DoD.

- For parts NOT available from trusted suppliers, then contractors and subcontractors are required to comply with the notification, inspection, testing and authentication requirements utilizing **risk-based assessments.**

The deadline for filing comments on the proposed rule is **November 20, 2015**. Info on the rule at: [www.federalregister.gov/articles/2015/09/21/2015-23516/defense-federal-acquisition-regulation-supplement-detection-and-avoidance-of-counterfeit-electronic](http://www.federalregister.gov/articles/2015/09/21/2015-23516/defense-federal-acquisition-regulation-supplement-detection-and-avoidance-of-counterfeit-electronic)

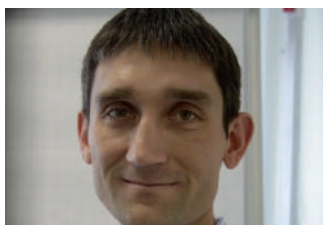






# Riders after the storm

by Ivan Pokrovsky  
Executive Director  
ASPEC



After a rapid decline during 4th quarter 2014 and 1st quarter of 2015, The Russian market recovered by 12% in the 2<sup>nd</sup> quarter and stayed at

the same level in the 3<sup>rd</sup> quarter. It is not stable - we see large differences in data from distributors. Some segments of the market are fluctuating in antiphase. Therefore, we see the same results in two last quarters. What are leaders of Russian

***"Most of the speakers are expecting a further reduction of the market or stagnation at the current level"***



companies expecting for the end of the year? We discussed it at the Forum of Distributors in October. Most of the speakers are expecting a further reduction of the market or stagnation at the current

level. All significant factors are negative or indifferent now for the Russian electronics industry. Budget expenses are reduced due to the low level of oil price and a reduction of export taxes volume. Even arms expenses are not

QUARTERLY MONITORING OF RUSSIAN DISTRIBUTORS SALES

Table 1

|                            | 1Q2014 | 2Q2014 | 3Q2014 | 4Q2014 | 1Q2015 | 2Q2015 | 3Q2015 |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|
| In Comparison with Q4 2010 | 106,7% | 125,3% | 133,7% | 116,1% | 94,8%  | 105,7% | 106,1% |
| Y2Y Growth                 | 6,2%   | 14,9%  | 19,6%  | -2,6%  | -11,2% | -15,6% | -20,6% |
| Q2Q Growth                 | -10,4% | 17,4%  | 6,7%   | -13,2% | -18,3% | 11,5%  | 0,4%   |



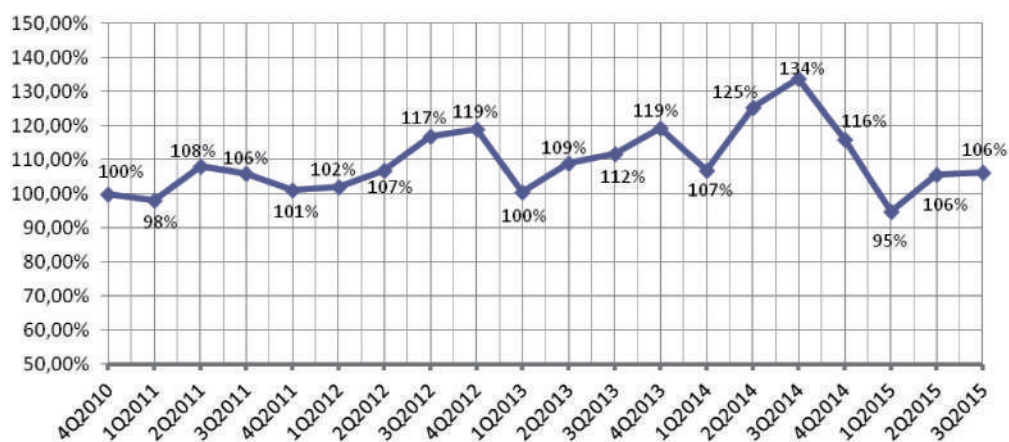


***“ Russian distributors are not melancholy. They look like skippers after a storm - all alive and all are excited ”***

growing more. Consumer demand has decreased as it depends on the budget expenses. Investment demand is dropped due to bad business conditions. The only positive factor is the import replacement in the end-products markets. But this factor is weak yet, it

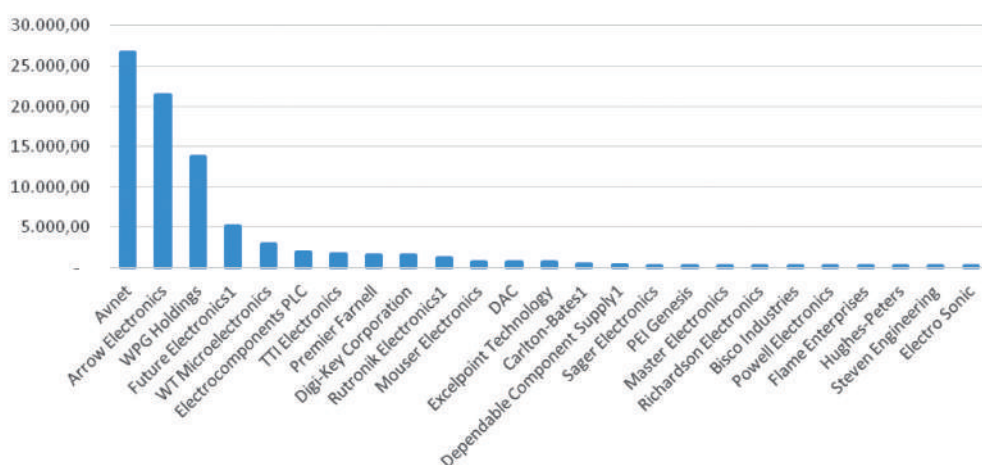
QUARTERLY MONITORING OF RUSSIAN DISTRIBUTORS SALES

Graphic 1



TOP 25 GLOBAL ELECTRONIC COMPONENTS DISTRIBUTORS

Graphic 2



Source: The EBN Top 25 Distributors survey 2013, www.edn.com

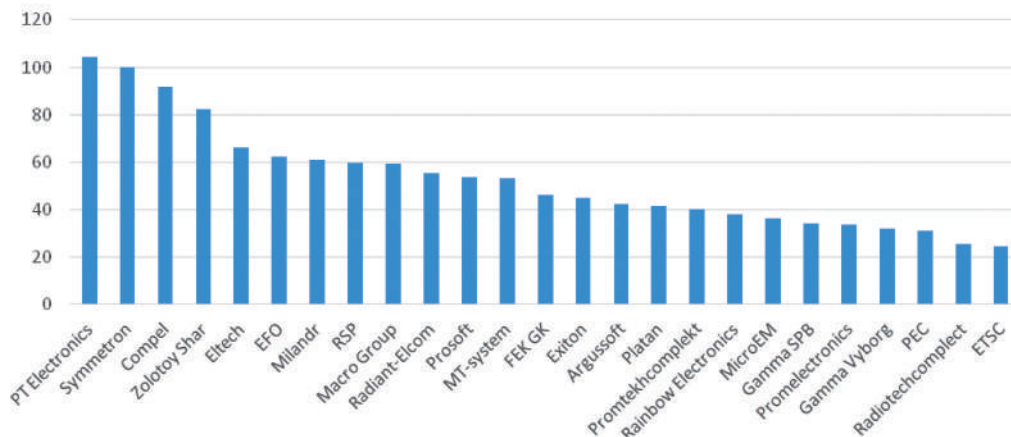
can't compensate all negative trends.

Participants of the Forum of Distributors predicted a market decline in 2015 by **12-17%** compared with 2014. Optimists predicted a slow growth in 2016 by 2-3%, pessimists predicted a slow reduction. Nobody thinks we will return to 2014 levels until 2018. Nevertheless, the Russian distributors did not look melancholy. They looked like skippers after a storm - all alive and all are excited.



TOP 25 RUSSIAN ELECTRONIC COMPONENTS DISTRIBUTORS

Graphic 3



Source: The Report of the Center of Modern Electronics, [www.sovel.org/index\\_eng.php](http://www.sovel.org/index_eng.php)

**"The Forum of Distributors predicted a market decline of 12-17% in 2015"**

impetuous drop and fast rise. Nobody was ready to discuss merges on the roller-coaster. Today we live in new reality where the only way to growth is to get the market share of another.

May be in the future the shape of the row of top 25 Russian distributors will be like the top 25 of global distributors. Not by the sales volume but by the consolidation measure. See the graphic 2.

The first exciting challenge is the boom of **M&A activities** in the global market. Together with the Russian

market recession, it calls for consolidation of Russian distributors. Indeed, it was no reasons to

merge when organic growth was about 20% a year (before 2009). The crises of 2009 were like a roller-coaster with

by Lena Norder  
Svensk Elektronik  
Trade Association



More than 100 companies from 20 countries were represented as exhibitors at the 10<sup>th</sup> Embedded Conference Scandinavia in Stockholm, an event presented by the Swedish electronics trade association, Svensk Elektronik. Opening Speaker at the conference was **Sara Mazur**, Global Head of Research at **Ericsson**. The rich program offered more the 90 presentations and workshops, all in English, attracting over 1800 visits.

It all started over 10 years ago with embedded technology companies

## Embedded Conference Scandinavia 10 years Jubilee



wanting to make embedded technology more known and used, as it was a rather unknown technology at the time. They became members of Svensk Elektronik, joined forces to make a difference.

First Swedish Embedded Award was initiated, to

promote and show the wide range of possibilities enabled by embedded technology and not least, to encourage students to work in this

The proud winners of Swedish Embedded Award 2015, at the prize ceremony at Embedded Conference Scandinavia

field. The next step was to establish Embedded Conference Scandinavia, an arena for knowledge, inspiration and business. It started off in a quite modest size but has since then expanded hugely. Thanks to the very committed and devoted companies, this has been a fantastic and successful journey. The next big event coming up is Scandinavian Electronics Event Apr 19-21, 2016 - our biggest arena for the whole electronics industry.





by **Silvio Baronchelli**  
Assodel  
[www.assodel.it](http://www.assodel.it)



It was the fifth edition of absolute success for **Illuminotronica**, the unique Italian professional event devoted to "visible electronics" and its applications, and was held from 8 to 10 October in Padua. A success established by the presence of an audience of **over 6,300** highly skilled professionals, composed of decision makers, buyers, energy managers, plant engineers, installers, system integrators, architects, lighting designers, technical offices of municipalities and lighting designers.

Starting with a "sell out" of stand space and with an exhibition area of over 3,000 square meters, more than 160 companies attending from the home automation, lighting and electronics sectors plus the event grew by **35%** compared to last year! Also notable has been the increase in **international visitors (+ 20%)**, which together with the qualified operators, underlined the great success of the initiative. This year Illuminotronica comprised three application areas - **Lighting & Design, Home Automation and Micro & Electro** - with corresponding exhibition spaces, conference sessions, courses and workshops.



## ILLUMINOTRONICA 2015

### Record numbers for the Italian trade show devoted to smart lighting and home automation

The numbers attending Illuminotronica confirms the event as the International reference point for all lighting professionals and home automation operators. This unique event in the Italian panorama is designed to develop business, learn and discuss the topic of smart lighting, home automation and new technologies, focusing on human-centric solutions and products dedicated to the populations's wellbeing and safety.

#### A WINNING FORMAT COMPRISING BOTH TECHNICAL CONTENT AND EXHIBITION

Enthusiasm and the sharing of ideas has produced a winning formula for this annual event. This, together along with initiatives dedicated to training and education, made up the key elements of Illuminotronica 2015. LED Lighting and smart cities; home automation, security and visual control; return on

investment and payback period; smart lighting and lighting control; OLED and new technological frontiers; Human-Centric Lighting; standards, regulations and protocols for installation; energy saving and smart solutions. These have been some of the topics that have characterized the schedule of the conferences, with more than 70 debates and lectures.

#### PRIZES FOR EXCELLENCES IN LIGHTING DESIGN AND SMART CITIES

Illuminotronica was also an opportunity to recognize excellence in solutions and lighting design, through:

##### • **Ecohitech Award**

Now in its 17<sup>th</sup> edition, it is aimed at municipalities and

public bodies that have adopted LED technology in public lighting achieving significant results of energy savings and comfort.

##### • **Codega Prize**

International recognition of excellence in lighting design promoted by **Assodel** in collaboration with **IDEA** (*International Federation of Electronics Associations*) and with the support of **APIL** (*Italian Association of Lighting Professionals*)

#### SAVE THE DATE FOR 2016

The next edition of Illuminotronica is scheduled for the 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> of October of 2016.

For information:

[segreteria@illuminotronica.it](mailto:segreteria@illuminotronica.it)  
[www.illuminotronica.it](http://www.illuminotronica.it)







# CODEGA PRIZE 2015 WINNERS

The awards ceremony for “excellent solutions in LED lighting design 2015” was held in Venice

The third edition of the Codega Prize, the international award recognising excellent solutions and installations in lighting design and LED lighting, was very successful and attended by over 140 people from the academic and professional world.

In the wonderful setting of Zeno Palace in Venice on **Friday 9<sup>th</sup> of October**, some of the most prominent figures in the world of lighting design gathered together. The jury expressed great satisfaction at the very high quality of the projects submitted for the award, a sign of cultural growth and of an increasing attention to lighting designers' role.

## THE WINNERS OF

### THE COMMITTEE

The Jury of the Codega Prize is composed by qualified experts of lighting and electronics sectors:

**Domenico Caserta**  
President of Assodel

**Stefano Catucci**  
Director of Lighting Design Master at La Sapienza University of Roma

**Francesco Iannone**  
Lighting designer

**Gary Kibblewhite**  
Past president of IDEA

**Massimo Malaguti**  
Director of Univeneto

**Fabio Peron**  
Teacher at IUAV University of Venice

**Maurizio Rossi**  
Director of Lighting Design & LED Technology Master at Politecnico of Milan

**Paola Urbano**  
Lighting Designer, Co-founder of APIL and Member of its Board

### THE THIRD EDITION

The first prize of the Lighting Design category went to the lighting project of **Victoria Grande Fortress**, realized by **Francisco Javier Sanchez Gorriz** from the Spanish studio DCI for the following reason:

*“The lighting of a place of high historical value has been achieved with strong contemporary language, a daring artistic interpretation performed using light effects. This approach gives a strong boost to innovation and reinterpretation of a cultural project, declaring courage and domain of ‘light’.”*

Special mention for another lighting design project, this time realized by an Italian team: the lighting project of **Chiostro (Cloister) of SS. Trinità**, made by **Claudia Giacomobello** and **Giovanni Liotta** from **Savetheclock** studio.

*“The lighting of a place of high historical value - quotes the citation - was resolved with a full understanding of the architectural pace and rhythm of the setting, allowing the light condition to support the architecture and the works of art included there. This design process is a usual way to deal with the cultural heritage but rarely is achieved with this balance.”*

### OUTSTANDING ACHIEVEMENTS BY OTHER FINALISTS

Among the finalists of the prize there were other projects with



Codega Prize - 1<sup>st</sup> Winner Victoria Grande Fortress

outstanding installations in the cultural heritage field, all looked after by big names of Italian lighting design, such as the lighting project of the **Upper Basilica of St. Francis of Assisi** (by Marco Frascarolo) and of the **Imperial Forums in Rome** (by Francesca and Vittorio Storaro).

International projects have also played an important role, like **Medusa Project** (by Dean Skira) and the **Fashion Gallery** (by LichtVision).

### THE SECOND CODEGA PRIZE AWARD CATEGORY WAS “LED LIGHTING SOLUTIONS”

For the category “**LED solutions**”, the first prize went to **Medusa** of **LAM32**, a custom made product realized for the project of Dean Skira at Cikat, in Croatia.

Other finalists products were those of Album, Luce & Light, Martinelli Luce, Oluce, Spotlight, Album and B-Light.

[www.codegaprize.com](http://www.codegaprize.com)



# Challenges in the UK/Ireland electronic components market...

by Adam Fletcher  
Chairman of IDEA and ECSN  
[www.ecsn-uk.org](http://www.ecsn-uk.org)



After eight quarters of positive sales revenue growth the UK / Ireland electronic components market turned slightly negative in Q2'15 resulting in a first half outcome of (0.3%) decline compared to the previous year. Whilst this is disappointing it was not unexpected but the result is at the lower end the association's forecast range.

The forecast predicted *"low but improving growth over the year"* however the current Book-to-Bill ratio remains stubbornly close to unity suggesting that unless there is a significant change in macroeconomic activity the full year outcome is likely to be "flat" i.e. little change on the previous year.

The automotive, aerospace and defence sectors are progressing much as expected but growth is

being held back growth by sluggishness in the wider industrial (Medical, IOT, Instrumentation) sector, where investment in new technologies driving growth remains much lower than anticipated.

## INDUSTRY CONSOLIDATION

Organisations in the global electronic components supply network are highly robust and have become very adept at managing continuous serial changes in demand and supply. However the current high level of what is effectively huge parallel change resulting from a dramatic increase in merger and acquisition activity within the semiconductor market is going to take some time and effort by all parties to resolve.

***" There will I suspect be a number of short periods of significant turbulence in the market as the newly merged organisation's become established "***

There will I suspect be a number of short periods of significant turbulence in the market as the newly merged organisation's

become established, define their product portfolios and channel partners, and re-engage with the market. The critical issue here is successfully managing these multiple and diverse relationships, whilst communicating effectively throughout the integration process.

## STRATEGIC VISION AND INVESTMENT

The vast majority of governments and economic think tanks continue to take little interest in the strategic importance of electronic components and particularly in semiconductor manufacturing. This has to change!

They don't seem to realise the impact this is having on the effective operation of their economies and to the everyday lives of their citizens. Just consider the potential economic impact of a catastrophic event or political upheaval occurring today at a large wafer foundry in Asia... Only a handful of commercial organisations are going to be able to meet the projected costs of the next generation of semiconductor manufacturing operations, which will primarily be based in Asia.

This consolidation may pose a significantly increased risk of access to and supply of the

latest technologies. European governments and commercial organisations really need to start collaborating to jointly invest or encourage joint investment in the establishment of a 450mm semiconductor wafer fab, its supply network infrastructure and ecosystem within Europe. I suspect that in a decade's time, the failure to have participated in this technology is likely to be retrospectively viewed as a policy mistake.

***" The vast majority of governments and economic think tanks continue to take little interest in the strategic importance of electronic components "***

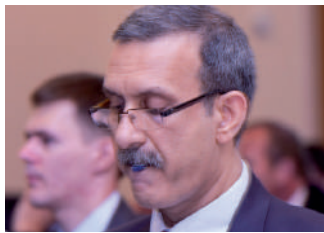
Change is inevitable in the global electronic components markets and it is important that all organisations (and governments) develop effective strategies for dealing with it to maintain their competitive advantage. It might be seen as counter intuitive in our highly competitive sector but our salvation lies in all parties in the UK / Ireland electronic components supply network actively engaging and communicating their business intelligence with their partners.

Intelligently managed collaboration and communication costs little and could benefit all.



# India attracting FDI in electronics sector

by Rajoo Goel  
Elcina  
www.elcina.com



Strong policy support along with procedural facilitation and ease of doing business is the backbone of investors trust. Slowly, but surely, India has understood the importance of this fact and is trying to win investor's confidence by leaving no stone unturned to achieve this objective. It is heartening to see that the results are beginning to trickle in. As per "FDI Markets" an online data forum, India has become the top **Foreign Direct Investment (FDI)** destination with \$30.8 billion of FDI inflows. 100% FDI under the automatic route is already allowed in the Electronic Systems & design Sector (ESDM) Sector, while in case of the rapidly expanding

Defence Sector, the FDI Policy has been liberalised with 49% Investment allowed under the automatic route.

**" India has become the top Foreign Direct Investment destination with \$30.8 billion of FDI inflows "**

India is flush with lucrative FDI opportunities in the ESDM sector with demand for electronic products estimated to cross **USD 400 Billion by 2020**. Some of the **key segments** comprising this huge market estimate are as follows:

- Telecom Equipment (USD 34Bn)
- Laptops, Desktops, Tablets (USD 34Bn)
- LED (USD 35Bn)
- Consumer Electronics (USD 29Bn)
- Set Top Boxes (USD 10Bn)
- Auto Electronics (USD 10Bn)
- Medical Electronics (USD 8.5Bn).

India has been ranked as the most attractive investment

destination in the world for the next three years, according to a survey by global firm **EY**. For this study, 32% of the business leaders from global corporations said India is the most attractive investment destination in the world, followed by China, Southeast Asia and Brazil. The study clearly brings out that there is an increased focus and emphasis on manufacturing.

It finds major gains in perception as compared to the findings of the 2014 survey in key areas such as **macroeconomic stability** (up from 70% in 2014 to 76% in 2015), **political and social stability** (up from 59% to 74%); **relaxation in FDI policy** (up from 60% to 68%); and the **government's efforts to ease doing business** (up from 57% in 2014 to 67% in 2015).

In the last couple of years, various prestigious companies have started investing in the country with big long term plans. These include global majors like **Samsung** (South Korea), **IBM** (USA), **LG** (South Korea), **Tower Semiconductor** (Israel), **Dell** (USA), **GE** (USA), **Jabil** (USA), **Motorola** (USA), **Lenovo** (China), **Flextronics** (USA), **Foxconn** (Taiwan), **Bosch** (Germany), **Applied Materials** (USA) and more.

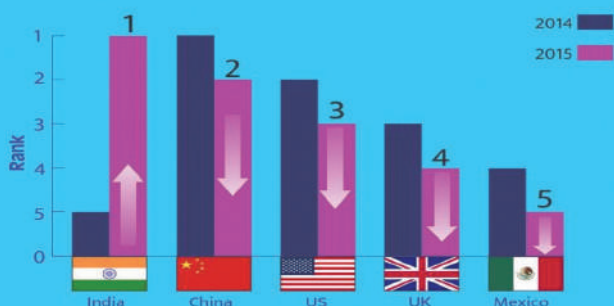
assemblies, design and finished equipment. There are investment proposals in excess of US\$ 4 Billion under various stages of approval for financial support under the Electronics Policy. Many of these projects are already approved and under implementation including LED Products, Mobile Phones, Auto Electronics, Telecom as well as components such as PCB's, Capacitors etc. A number of EMS projects are also approved and under implementation which will strengthen the electronics value chain.

India is still a non-starter in Semiconductor manufacturing and the two proposed Wafer Fabs worth US\$10 billion, one led by **Jaiprakash Ass.** and **IBM**, and the second led by **Hindustan Semiconductor Manufacturing** and **ST Microelectronics**, are progressing very slowly and may take another 2-3 years.

There is a need for rapid expansion of Assembly Test Marking & Packaging (ATMP) of Semiconductor Chips and **Elcina** believes that ATMP is a major opportunity in which international companies can invest with good returns. A positive recent development is the extension of Modified Special Incentive Package Scheme which provides 25% grant on investments in ESDM Sector. Investment proposals worth US\$ 4 Billion have already been received under this Scheme which will be open for another five years up to 2020.

## FOREIGN DIRECT INVESTMENT DESTINATIONS

Chart 1



Source: fDi Markets

The **National Policy for Electronics (NPE)** announced in 2012 has opened up new opportunities in the ESDM sector in a vast spectrum of electronic materials, components,





# Update on ESDM sector in India

## Government Initiatives for creating the right ecosystem for electronics manufacturing

by Rajoo Goel  
Elcina  
[www.elcina.com](http://www.elcina.com)



**MSIPS** (Modified Special Incentive Package Scheme) is a scheme under the National Policy on Electronics, providing 25% grant against Capital Investments in Electronic Systems Design and Manufacturing (ESDM) Sector.

Investment proposals of 16 billion USD have already been received and lot more are underway under MSIPS scheme which provides lot of incentives for electronics manufacturing. This scheme has been extended for a period of five years up to July 2020. Full details on: [www.msips.in](http://www.msips.in)

**“ Investment proposals of 16 billion USD have already been received ”**

### DIGITAL INDIA

Digital India is an initiative of the Government of India to ensure that government services are made available to citizens electronically by improving online infrastructure and by increasing internet connectivity. It was launched on 1 July 2015 by Prime Minister Narendra Modi. The initiative includes plans to connect rural areas with high-

### INVESTMENT (A FEW KEY INVESTMENTS ANNOUNCED RECENTLY)

- 1. Foxconn**, the world's largest contract electronics manufacturer, has signed a \$5 billion deal to set up R&D and hi-tech manufacturing facilities in western India within the next five years. The Taiwan-based firm, manufactures for a host of global device brands like Apple, BlackBerry, Amazon, Motorola, Xiaomi and Sony.
- 2. Lenovo, Motorola** start smartphone manufacturing in India with **Moto E**: Lenovo and Motorola have announced that they will start manufacturing smartphones in India at a 40,000 square feet factory in Sriperambudur, Chennai
- 3. Foxconn** has also announced that it would inject \$20 billion into India's solar sector along with Japan's SoftBank and India's own telecom firm, Bharti.
- 4. Samsung**, the country's largest phone seller, has been manufacturing in India since 2006. This year, it has spent more than 80 mn. USD to add capacity at its plant in Noida where it makes many models, including the Tizen-powered Z1, Galaxy S6 and S6 Edge along with various models of Micromax.
- Chinese phone maker **Gionee** plans to invest 50 mn. USD over the next three years. "We announced our Make in India initiative in early April and plan a full-fledged factory over the next three years".
- 6. Sterlite Technologies** under the Digital India theme will also set up a LCD manufacturing plant in the country with an investment of 6 billion USD and which will generate about 50,000 jobs.

speed internet networks.

Digital India has three core components:

- 1.** The creation of digital infrastructure
- 2.** Delivering services digitally
- 3.** Digital literacy

Projects under Digital India Program:

- 1.** Digi Locker
- 2.** MyGov.in
- 3.** eSign Framework
- 4.** Swach Bharat Mission mobile app
- 5.** National Scholarship Portal
- 6.** eHospital
- 7.** Digitize India Platform
- 8.** Bharat Net
- 9.** Wi-fi Hotspots
- 10.** Next Generation Network

**11.** Electronics Development Fund

**12.** Centre of Excellence on Internet of Things (IoT)

Full details may be obtained from: [www.digitalindia.gov.in](http://www.digitalindia.gov.in)

**“ The Electronic Development Fund (EDF) in set up to provide risk capital to compaines developing new technologies ”**

### ELECTRONIC DEVELOPMENT FUND:

Government of India has decided to appoint M/s CANBANK Venture Capital Fund Ltd. (CVCFL) as the implementation agency which will house the Electronics Development Fund. The Electronic Development Fund (EDF) is set up as a "Fund of Funds" to participate in "Daughter

Funds" which in turn will provide risk capital to companies developing new technologies in the area of electronics, nano-electronics and Information Technology (IT). It would be an open ended fund based on the merit and requirements of the project.

Full details may be obtained from: [deity.gov.in/DeitY\\_e-book/edf-book/index.html](http://deity.gov.in/DeitY_e-book/edf-book/index.html)



**IDEA NEWSLETTER**  
INTERNATIONAL DISTRIBUTION  
OF ELECTRONICS ASSOCIATION

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## CONSORZIO ELETTRIMPEX LUMEN INTERNATIONAL

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The Elint Consortium acts in the SSL (*Solid State Lighting*) and Electronics area to promote products and applications internationally. Elint is a member of Federexport-Confindustria and actively cooperates with several public Institutions for matters regarding export.

## ACTIVITIES

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*Fairs & Events* - The Elint Consortium holds more than 12 International Fairs & Events and many in-depth workshops

*ILLUMINOTRONICA* - Is the international event annually organized by Elint and devoted to manufacturers, lighting designers, SSL electronic engineers, who manage drive and control, LED/OLED components, products, applications and lighting systems

*Fortronic* - International events with UK, China, Tunisia and South Africa partners

## COMMUNICATION

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*Publishing* - Magazines and Directories

*Idea Newsletter* - Quarterly newsletter covering market statistics and projects sent to an international mailing list

*Forum & Conferences* - Milan, Rome, Turin, Padua, Florence and Bologna

*Web:* [www.consorzioelint.it](http://www.consorzioelint.it) - [www.ledin.it](http://www.ledin.it) - [www.illuminotronica.it](http://www.illuminotronica.it)

## TRAINING

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*Courses:* Specialized courses covering LED technology and LED lighting for overseas applications.

*Award:* Ecohitech, LEDin and Codega Awards dedicated to Lighting Designers and Engineers for design, technology and eco-efficiency innovation.

## QUALITY

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*European Collective Warranty Mark LUMED:*

Lumed is promoted and realized by Assodel / Elint based on the Project of Internationalization Technologies and Applications SSL approved by

*Law 134/2012-DM22-DDG January 11, 2013 Italian Ministry of Economic Development.*

The Collective Mark Lumed aims to ensure safety in the purchase of SSL products.