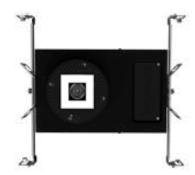
A MONTHLY NEWSLETTER FROM AMERLUX®

**APR 2021** 

#### Be Shallow, Not Superficial

- Beautifully Thin Ceiling Lighting to Love, No Matter What's Above
- Be completely shallow. Cast your ceilings in all their beauty.
- Both never looked so good—with **Solace**.

Amerlux's spec-grade shallow plenum downlight gorgeously solves an ugly pain point: super-tight plenum space. With an extremely low 2 ¼ inches recessed depth (downlight and wall wash) and a recessed adjustable with recessed depth of just under 3 9/16 inches, **Solace** fits flawlessly in any crowded design.



Make clogged plenum an architectural non-factor. Instantly solve any surprises. Keep projects on deadline and on budget. No dreaded callbacks, no pricy rewiring. Get total peace of mind—not matter what you find behind. **Solace** is the perfect, must-have downlight for an amazingly uncomplicated design and installation process.

The right fit for any interior commercial application where slender plenum has you in a jam, **Solace** requires just two inches of plenum space to make your ceilings tower under stunning recessed lighting.

#### Features:

- 3-inch aperture with round and square cast aperture trim
- Field interchangeable feature optics
- · Lensed wall washers
- Recessed adjustables with 40-degree lockable tilt and 360-degree rotation
- More than 1600 lumens
- · New construction, airtight IC and Chicago plenum applications

Enjoy our video: <a href="https://www.youtube.com/watch?v=NQHA\_wfm3Q">https://www.youtube.com/watch?v=NQHA\_wfm3Q</a>

#### National LED Energy Market Observer:

1. **Rebate Trends for 2021 by BriteSwitch** - 2020 was an incredibly tough year for many industries. As electrical utilities struggled to hit their energy savings goals, a record number of bonus rebates, 20% of the active programs in 2020, offered a bonus. Just as we've seen in previous times of economic turmoil, like the financial crisis of 2008, rebates increased to spur participation. Because of this, 2021 is shaping up to be a solid year for commercial lighting rebates.

Rebate Trends for 2021 (briteswitch.com)

- 74% of the US Offers A Commercial Lighting Rebate
- Rebate Amounts for LEDs Stay Flat ... And That's Remarkable
- Be Aware of Changes in DLC
- Longer Pre-approval and Check Processing Times



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2. Lighting Controls Transform Niagara Falls at Night - The famous color LED lighting at Niagara Falls in the US has been transformed with the latest cloud-based control system from a British manufacturer. The spectacle – which actually comprises three individual waterfalls, American Falls, the Bridal Veil Falls and the Canadian Horseshoe Falls – has a long history of illumination. Pharos Architectural Controls was appointed to deliver a new control system for The Falls' lights. Pharos' system offers fresh lighting content, better flexibility for developing new design concepts, and remote management in the cloud. Pharos supplied an LPC 4 that controls both the American and Canadian sides of The Falls. The LPC 4 is physically located on the Canadian side and is linked via a fiber network to distribute data to three separate locations in Niagara Falls, Ontario to



illuminate all three waterfalls. The project was a collaboration between Pharos, Pathway Connectivity — who delivered the data distribution via fiber optics, as well as a new back-up system — and SixEye. <u>Lighting controls transform Niagara Falls at night - Lux Review</u>

- 3. Introducing Universal Douglas Lighting Americas, Inc. (UDLA) Atar Capital announced today that it has acquired Universal Lighting Technologies, Inc. and Douglas Lighting Controls, Inc. As part of this strategic acquisition, the two businesses will be known as Universal Douglas Lighting Americas, Inc. ("UDLA"). The new company, bolstered by Atar Capital's leadership, will maintain headquarter locations in both Nashville, Tennessee and Burnaby, British Columbia, Canada. Through the change of ownership, management will continue to further unify the two businesses into a single integrated company to address the needs of the market for a broader and more integrated suite of products and solutions. Universal Lighting Technologies manufactures innovative LED lighting solutions for the commercial market with solutions that range from LED upgrades and retrofits to connected lighting solutions and IoT digital services. Douglas Lighting Controls develops advanced control systems and end-to-end energy-efficient digital lighting control solutions for commercial buildings, campuses and sports complexes. Introducing Universal Douglas Lighting Americas, Inc. (UDLA) EdisonReport
- 4. New Energy Efficiency Codes Set Path Toward Green Buildings The next office building you visit may have innovative technology making it substantially greener thanks to the help of energy efficiency experts at Pacific Northwest National Laboratory (PNNL). In partnership with the U.S. Department of Energy's Building Technologies Office, PNNL provided expert analysis and technical background for some of the most ambitious building energy efficiency codes proposed for the 2021 International Energy Conservation Code (IECC) updates. New energy conservation codes establish a path toward the green buildings of the future. This year, a new code will dictate steps builders must take to reduce the carbon footprint of new and existing commercial and residential buildings. The code establishes minimum energy efficiency requirements for heating, lighting, ventilation, insulation, windows, and other energy-related building components. https://www.pnnl.gov/
- 5. **NEMA Publishes New Standard for LED Replacement Lamps** The National Electrical Manufacturers Association (NEMA) published NEMA LL 10-2020 Replacing HID Lamps with LED Lamps: Light Output Equivalency Claims. This new Standard assists manufacturers in preparing HID equivalency claims for LED products replacing HID lamps. "The NEMA LL 10 Standard provides a basis for manufacturers of LED replacements for HID lamps to claim light output equivalency to HID lamps. It also provides a means for customers to verify manufacturer equivalency claims," said Jim Gaines, Signify North America Corporation and chair of the NEMA Light Source Technical Committee. <u>NEMA LL 10-2020</u> is available for \$63 on the NEMA website.



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- 6. **LED Light Therapy for Skin: Does It Work?** LED light therapy is a popular noninvasive skin treatment for acne, sun damage, wounds, and other skin problems. People can choose to have LED light therapy at a dermatologist's office or to use a device at home. The treatment uses varying wavelengths of light to trigger the skin's natural healing processes to repair the skin. Several treatments are necessary to see results. In this article, we explore how LED light therapy works and who might be a good candidate. We also cover the possible side effects. <u>LED light therapy: What is it, and does it work? (medicalnewstoday.com)</u>
- 7. **DLC Announces Delisting of SSL Products Non-Compliant with V5.0** Continuing a push to maximize the efficacy of commercial lighting while promoting advances in quality of light, the DesignLights Consortium recently issued a reminder that products that have not been updated to comply with newer solid-state lighting (SSL) <u>performance standards</u> were removed from the DLC's Qualified Products List (QPL) on February 28. After the new delisting date of February 28, the DLC will allow products non-compliant with SSL V5.0 to remain searchable using the "Show De-Listed Products" filter on its <u>SSL QPL search page</u>. Full SSL Technical Requirements V5.0 (and V5.1) details are explained in a previously-recorded DLC <u>webinar</u>.
- 8. **CLTC Publishes Education Videos for California Title 24** The California Lighting Technology Center (CLTC) recently released new videos introducing California's 2019 Title 24, Part 6 lighting requirements. Each video introduces a specific topic in the energy code: 2019 Title 24, Part 6 Lighting Education Videos | California Lighting Technology Center (ucdavis.edu)
  - Lighting Controls Technologies & Requirements
  - Lighting Alterations
  - · Lighting Controls Acceptance Testing
  - High Efficacy Lighting
- 9. **Lightfair 2022 Dates Announced** LightFair recently announced that its 2022 trade show and conference will return to the West Coast, taking place in West Hall at the Las Vegas Convention. The trade show is June 21-23, 2022, and the conference is from June 19-23, 2022. For more information on the venue, visit the LightFair website.
- 10. Bluetooth Mesh Integrated in LED Fixtures Serves 22-Story Minnesota Office Building EMC, Silvair, and McWong have partnered to retrofit a 470,317-sq. ft office building with Bluetooth mesh connected luminaires to deliver additional energy savings and perhaps an IoT future. The Minnesota project certainly proves out many of the claims made by Bluetooth mesh proponents. EMC installed 3685 luminaires in a one-for-one retrofit of existing lighting. And later EMC upgraded an additional 225 luminaires in common areas such as elevator lobbies with Bluetooth nodes. And all of those luminaires are connected in a single Bluetooth mesh network with no gateways required. The building does serve many tenants. So the new lighting has been commissioned and organized into 43 separate control areas with a total of 708 control zones. So each tenant has control of their own space. Bluetooth mesh integrated in LED fixtures serves 22-story Minnesota office building | LEDs Magazine
- 11. **NEEP's Energy Efficiency Snapshot: 2020** Northeast Energy Efficiency Partnerships (NEEP) Energy Efficiency Snapshot uses REED data to provide various analyses, including energy savings and expenditures in each REED state and the District of Columbia over time. Policy highlights that provide background context for the energy savings are also included. The 2020 version provides an overview of EE by the numbers in the Northeast and Mid-Atlantic region and includes information that can assist communities, states, federal agencies, utilities, NGOs and industry to accelerate state and local government adoption of equitable and impactful building decarbonization policies, programs, and best practices. Energy Efficiency Snapshot Spring 2017 (neep.org)
- 12. **Strategies in Light Program Gives 3-D and Germicidal UV a Strong Billing** While it is certainly not "final," the conference program for August's Strategies in Light in Santa Clara, CA is now live. Strategies in Light will hold two separate sessions on the schedule. One will headline the technology developments behind UV-C LED devices, their manufacturing evolution and performance achievements, and the capabilities of what is called far UV-C (222-nm radiation). The advance of LED and SSL technology depends on constant interaction and learning from stakeholders and experts in the field, so register to join us from Aug. 24-26, 2021. You can bookmark the program as well to find updates as items are refined in the schedule.



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- 13. **nLight Publishes Whitepaper Describing ABT Technology** nLight®, an Acuity Brands company, recently published a new whitepaper describing its new nLight Autonomous Bridging Technology (ABT), which increases the range and improves the responsiveness of wireless networked lighting controls across indoor and outdoor spaces and around obstructions. Through ABT, networked messages are repeated across multiple, already-connected wireless devices. This bridging technology extends messages farther, increasing the wireless range from 3x to 4x in both indoor and outdoor environments. In addition, ABT extends messages around obstructions such as corners, walls, elevators, and stairwells. Autonomous Bridging Technology extends the lighting controls network while allowing wireless groups to broadcast strong, uniform signals across long distances in unison, creating a robust network without adding unnecessary latency to general operation. Download at: nLight AIR ABT Whitepaper (acuitybrands.com)
- 14. **DLC Releases Second Draft of Update to Technical Requirements for Horticultural Lighting** The DesignLights Consortium (DLC) recently released the second draft of updated Technical Requirements for Horticultural Lighting (Version 2.1). Scheduled to take effect on July 1, the proposed changes would establish Qualified Products List (QPL) eligibility for three additional product types. The DLC will accept comments on draft Technical Requirements for Horticultural Lighting V2.1 through Friday, April 9 via a comment form at: Horticultural Technical Requirements V2.1 DesignLights Consortium
- 15. **A Look at GUV Lamps by Joe Knisley** Germicidal Ultraviolet lamps (GUVs) can help combat the COVID-19 virus. The UV spectrum is divided into the UV-A, UV-B and UV-C regions, which are 315 nm to 400 nm, 280 nm to 315 nm and 200 nm to 280 nm, respectively. The UV-C band of ultraviolet radiation from the sun does not reach the earth's surface, being blocked by the ozone layer in the upper atmosphere, but it is created by different lamp types for germicidal use, and is the only one capable of fighting the COVID-19 pathogens. When a micro-organism is exposed to UV-C, the nuclei of the cells are modified, and as a result, cell division and, by extension, reproduction is prevented. The virus has been mutating since it was identified a year ago, and there is increasing consensus that globally, SARS-CoV-2 is likely to remain endemic for at least a decade. It is also possible that the virus will be seasonal, with predictable annual peaks. A Look at GUV Lamps | Electrical Wholesaling (ewweb.com)
- 16. **Germicidal UV Light Disinfection Technology by Jeannine Wang, Director, Technology Solutions** Acuity Brands Lighting How ultraviolet light (UV) works as a disinfection technology depends upon the wavelength(s) being employed. The UVC band with a wavelength of 200-280nm has emerged as a highly viable solution for interior architectural settings such as offices, retail settings and schools, due to its proven effectiveness against both bacteria and viruses. Also, UVC is straightforward to apply in a defined area and its predicted effectiveness can be predetermined within a set of application design parameters and in reference to measured output data and laboratory test data. When an adequate dose is applied, UVC light can treat an area quickly. Utilizing UVC pathogen control can reduce the amount of chemicals that need to be used for disinfection purposes. When evaluating a space for application of a UV disinfection solution, there are several UVC-specific technologies to consider..... at: Brand Feature: Germicidal UV Light Disinfection\* Technology by Design Approach (facilitiesnet.com)
- 17. **9 Things You Probably Didn't Know About Baseball** Few things signal the arrival of spring quite like baseball's Opening Day. EC&M Illumination Insider decided to pay tribute to America's Pastime: <u>9 Things You Probably Didn't Know About Baseball EC&M (ecmweb.com)</u>
  - They Used to Throw the Ball at Base Runners
  - The Life of a Baseball is Very, Very Short
  - The American League is Ahead 64-48 THANK YOU NY YANKEES!
  - Some Guy was Traded for a 25-Lb Turkey
  - A Fan Got Hit by Foul Balls on Consecutive Pitches
  - The First Team Uniforms Included Straw Hats
  - There are About 18 minutes of Action in a Major League Baseball Game
  - The Deepest Center-Field Wall was Almost 500 Feet from Home Plate
  - A World War II Grenade was Designed After a Baseball



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- 18. **CLTC Quality Specification for Linear LED Retrofit Solutions** UCDavis The Million LED Challenge Program has expanded its product catalog to include high-quality linear LED lamps, retrofit kits and luminaires! The MLC Program also continues to offer LED A-lamps, PAR-lamps and downlights. Linear fluorescent lamps can be replaced with LED alternatives, but care must be taken to ensure LED replacements provide similar or improved performance. LED retrofits should provide better efficacy and deliver equivalent light distribution. By making an informed switch to LEDs, consumers can expect lower operating costs and improved lighting quality as compared to traditional fluorescent lamps. CLTC recommends the following criteria to help consumers successfully transition to LED retrofit solutions at: MLC-Phase-2-Flyer\_1.pdf (ucdavis.edu)
- 19. Lumileds and BIOS Detail the Human-Centric Lighting SkyBlue Offering Lumileds has announced the immediate availability of the Luxeon SkyBlue LEDs in partnership with BIOS (Biological Innovations and Optimization Systems) LLC, also known as BIOS Lighting. The new offering is termed an LED kit by Lumileds in its datasheet because the human-centric lighting concept requires that luminaire developers use groups of three packaged LEDs that together deliver the spectral power distribution (SPD) designed by BIOS to enhance sleep patterns, improve productivity, and generally raise the comfort level of people in a space. Each kit includes one of the new SkyBlue LEDs and two Luxeon 3030 HE Plus phosphor-converted white LEDs. Lumileds and BIOS detail the human-centric lighting SkyBlue offering | LEDs Magazine

#### Global LED Energy Market Observer:

20. Pharmacy Chain Deploys Upper-Room UV-C Lighting - A chain of pharmacies has become one of the first retailers to deploy so-called 'upper room disinfection' with UV-C mercury lamps to kill airborne viruses, including the coronavirus. Some 280 Philips luminaires have been installed at 40 branches of Slovakian drugstore chain dm, providing its customers and staff with an additional level of protection. The luminaires can be used with people in the store, as they are installed at a height which, in combination with shielding and optics, prevents exposure to the UV-C light source. Air in the upper part of the store is constantly disinfected using UV-C irradiation and natural



convection of airflow in the room. In this way, the maximum volume of air is disinfected, while at the same time safety is ensured and shoppers can continue to move about the stores. Pharmacy chain deploys upper-room UV-C lighting - Lux Review

- 21. **LED Market Value in 2021 is Projected to Increase to USD 16.531 billion** According to TrendForce latest report Gold+ Member: Global LED Industry Data Base and LED Player Movement Quarterly Update, the COVID-19 pandemic is expected to be eased in 2021. Automotive LED, video wall and lighting market demand is expected to recover, and demand for Mini LEDs will take off as well. In addition, horticultural lighting and UV LED market demand will consistently grow quickly. According to TrendForce, the LED market value in 2021 is expected to increase to 16.531 billion. TrendFoce summarized seven major applications at: <a href="TrendForce: LED Market Value in 2021 is Projected to Increase to USD 16.531 billion LED Inside">TrendForce: LED Market Value in 2021 is Projected to Increase to USD 16.531 billion LED Inside</a>
- 22 Bluetooth Mesh Gives Employees Personalised Lighting Control A state-of-the-tech project in Belgium combining the expertise of Xicato, Legrand and Kreon uses Bluetooth mesh to give the occupants personalised control of the lighting. Freed from traditional rigid wired and centralised controls systems, the Xicato Bluetooth Mesh controls system including Xicato's intelligent drivers afforded the flexibility needed for Legrand's Vantage system to create an environment for employees at Kreon's headquarters that delivered customised spaces. With a combination of sensors to detect light and movement, set schedules and personal choices, employees can now choose various light levels, music volumes, temperatures, and shade levels that meet their individual needs. Bluetooth mesh gives employees personalised lighting control Lux Review



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- 23. **Market Data: Residential Energy Efficient Lighting and Lighting Controls** This Guidehouse Insights report examines and sizes the global market for residential non-LED, LED, and connected LED lamps and luminaires and lighting controls. The types of controls analyzed include sensors, timers, dimmers, and connected controls. Residential lighting, lighting controls, and connected lighting market drivers and barriers are assessed. The major global regions (North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa) are analyzed, and forecasts of unit shipments and revenue extend through 2029. Market Data: Residential Energy Efficient Lighting and Lighting Controls (guidehouseinsights.com)
- 24. Citing Security, The Hague's Conference Center Deploys Li-Fi Ask any purveyor of Li-Fi about the technology's advantages, and the short list will always include "It's more secure than Wi-Fi." To that end, vendor Signify has landed a poster child, as a convention group that hosts an annual cybersecurity gathering in The Hague has installed a small pilot of the light-based Internet delivery medium. Holland's World Forum The Hague cited security as the reason why it has outfitted one of its 35 meeting rooms with two Signify Trulifi luminaires and USB dongles that 16 users can plug into their own laptops to gain a level of security that tops the Wi-Fi already in place. Compared to the radio waves of Wi-Fi, the light waves of Li-Fi are a more difficult target because hackers need a direct line of sight to the light source, which they cannot obtain if the Li-Fi is in a closed room. Citing security, The Hague's conference center deploys Li-Fi | LEDs Magazine
- 25. **NICHIA Delivers Industry's Highest Joint-Boost in Color Rendering and Efficacy** NICHIA, the world's largest LED manufacturer and inventor of the high-brightness blue and white LEDs, announces its H6 series. Implemented into NICHIA's 3030 mid-power 757 package to start, the new family of LEDs delivers the highest multi-level boost in color rendition and efficacy whilst maintaining the outstanding lifetime expected from NICHIA. Indeed, the H6 series delivers a color rendering index (CRI) of 90 while maintaining a level of efficacy seen in standard CRI 80 LEDs. <a href="https://www.ledinside.com/node/31835">https://www.ledinside.com/node/31835</a>
- 26. **UK Surrey Upgrades 89,000 Street Lights with 'Smart City' Tech** The new central management system (CMS) is being supplied by Urban Control in partnership with sister company DW Windsor and installed by Skanka. The lighting will be 'sensor-ready', meaning that the council can add functionality in the future should it wish to get data about the environment, such as traffic flows, levels of air pollution, flooding and ice on the roads. The system is scalable and can be adapted to other applications as future needs require. Surrey upgrades 89,000 street lights with 'smart city' tech Lux Review
- 27. **UK Ups Street Light Spending Following Woman's Murder** The UK government has announced it is nearly doubling the funds it is providing to make streets safer with lighting, CCTV, and other measures, a move that follows the high profile murder of a 33-year-old London woman earlier this month. The case has drawn widespread attention to the safety of streets for women and girls. After a meeting of the Criminal Justice Taskforce, Prime Minister Boris Johnson said the government is increasing its Safer Streets Fund spending to £45 million. <u>UK ups street light spending following woman's murder I LEDs Magazine</u>
- 28. **London Euston Station Trials UV-C Light on Escalator Handrails** Escalator handrails are being cleaned using ultraviolet light at London Euston station in a new trial to keep passengers protected from germs. The kit inside the escalator shines powerful ultra-violet (UV-C) light onto the handrail surface. Network Rail says the system kills 99.99 per cent of bacteria each time the escalator goes around. Engineers have installed the device into one of the station's six escalators as part of the trial. Continuously sterilizing the handrail from inside the mechanism helps stop the spread of harmful viruses like Covid-19. This latest anti-viral technology is one of several different trials Network Rail is carrying out in its stations to keep regularly touched surfaces clean. Euston station trials UV-C light on escalator handrails Lux Review



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- 29. **Think Tank to London: Improve Your Lighting Now** The London based Centre for London, a charity, points out in a new report that not only does the city lack a unified lighting plan, but that only two of its 33 localities have a strategy for their own areas. If the 32 boroughs and the financial district known as the City of London were to coordinate modern LED lighting design, controls, and implementation, the city would benefit in many ways, not the least of which would be economic, states the report, Seeing Clearly: How lighting can make London a better city. It says that lighting should aim to encourage outdoor social interaction of all sorts, from informal to sports, recreation, and cultural events. It should also foster mood and wellbeing. And it should encourage nightlife in a way that attracts people out to venues, and that improves safety and security including not just reducing crime, but also minimizing the potential for accidents. Think Tank to London: Improve your lighting now | LEDs Magazine
- 30. **Breakthrough as Lighting Software Giants Agree Data Format** Dial and Relux say the new Global Lighting Data Format (GLDF) is an open and free protocol that, crucially, will work with the latest Building Information Modelling (BIM) standards and processes. Until now, manufacturers have had to deal with the fact that users require internal product information in different formats and for different purposes. Engineers and designers use several different programs for different purposes and expect product data to be available, and of course uniform, across all applications. With the GLDF, manufacturers only need to maintain and offer a single format. All processes operated by manufacturer data can access the information from the GLDF. Breakthrough as lighting software giants agree data format Lux Review



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#### **Monthly Feature:**

#### Rebate Amounts for LEDs Stay Flat ... And That's Remarkable

For the first time in years, the average prescriptive rebate for LED products did not go down year over year, according to RebatePro. Historically, the rebate amounts for LEDs have fallen between 10 and 20% every year, so staying flat is a huge improvement. Below you can find the average rebates for the major LED categories.

2021 Average Rebate Amounts in North America					
Type of LED Solution	2021	% Change vs 2020	Type of LED Solution	2021	% Change vs 2020
Replacement Bulbs (A19, PAR, MR)	\$4	-6%	Screw-in HID (corncob)	\$53	0%
Linear Tube	\$4	0%	Accent / Track Lighting	\$56	30%
Pin-Based (cfl-ni replacement)	\$7	4%	Outdoor Wall Mount	\$91	-1%
Downlights	\$33	7%	Parking Garage Fixtures	\$94	0%
Troffers / Panels	\$33	-43%	Outdoor Pole/Arm Mount	\$97	-1%
Retrofit Kits (1x4, 2x2, 2x4)	\$34	2%	High Bay Fixtures	\$120	1%
*Based on prescriptive and midstream rebates as	s reported	in BriteSwitch Re	batePro 2/21		

Rebates for LED Tubes remain at an average of \$4 for a 4' tube. There was a slight decline of rebates for replacement lamps (A19, PAR, BR), but it was relatively minor, with a difference of just \$0.25 between this year and last year.

For the most part, LED fixture rebates are on par with the levels we saw last year. The only exception to this trend is troffer rebates which unexpectedly dropped 43% versus the previous year. Now troffers and retrofit kits have the same rebate amount. It's not clear why troffer rebates changed, but we don't expect to see such a significant decrease repeat itself next year. Since the rebates for fixtures can be relatively high, make sure to pay attention to any cost caps that may apply.

Rebates for lighting controls have been remarkably stable over the years, especially when compared to LEDs. In fact, if you look at the rebates over the last 10 years for all controls, there has been no change in the average amounts across all categories.

We expected to see growth in Networked Lighting Controls (NLC) rebates, but to our surprise, the 2021 offerings are very similar to 2020. Only 3 new programs added additional incentives for networked lighting controls, and the average amounts are consistent with last year. That being said, 35% of all rebate programs specifically mention networked lighting controls in their paperwork, and many other utilities will consider these types of projects under custom. That means, if you have a project with NLCs, it will most likely qualify for rebates, but it is still hard to quickly target areas with the best rebate programs for networked lighting controls.

Source: BriteSwitch RebatePro 2/2021

See the current rebate climate map and how it has changed over the past 13 years

