



# **HOW FAST IS SNEL PROGRESSING ? An Update**

# SNEL PROGRESS UPDATE

## Europe is a mature market

- 4.7 Million lifts in Europe + 130,000/year. We employ 140 000 people
- Europe is by far the first continent for lifts installed (51% of world lifts for 12% in North America, 11% in Japan and 10% in China)
- The new lift market is shifting to Asia. In 2007, more lifts were installed in China alone than in Europe
- The present world economic crisis will probably mean a reduction of 20% and more of new lifts installed in Europe during 2009!

# SNEL PROGRESS UPDATE

## Europe is a mature market

- The safety of existing lifts must be upgraded: 60% of the lift stock is 20 years and older
- The total renewal of the European lift stock would need more than 50 years to complete. Modernisation is thus essential to the industry, next to new installations and maintenance
- The safety of existing lifts is worsening in many parts of Europe, because of an ageing stock & lack of repair
- Lifts are the safest mean of transportation on earth. Accidents may NOT happen

# BASIC STATISTICS EUROPE 2006-2008

## TOTAL MARKET

	2006	2006	2007	2007	2008	2008
	Workers	Lifts	Workers	Lifts	Workers	Lifts
Austria	2,097	76,180	2,179	82,000	2,100	82,300
Belgium	2,510	77,500	2,553	78,000	2,250	78,300
Bulgaria						81,000
Czech Republic	2,950	108,000	2,980	110,000	3,120	111,400
Denmark	920	28,040	955	29,110	972	30,000
Finland	1,452	50,710	1,485	51,600		52,495
France	18,500	485,000	19,500	495,000	20,000	500,000
Germany	18,000	650,000	18,000	660,000	18,000	670,000
Greece	5,000	317,000	5,300	325,000	8,000	400,000
Hungary	1,000	33,760	1,000	34,249	1,100	35,288
Italy	25,000	850,000	25,000	870,000	25,000	885,000
Luxemburg	300	7,920	310	8,320	310	8,730
The Netherlands	2,507	81,730	2,600	85,000	2,600	86,500
Norway	778	29,390	1,134	35,300	1,150	35,900
Poland	5,000	72,644	5,000	76,088	5,000	80,812
Portugal	2,300	110,500	3,000	130,000	2,850	140,000
Romania						29,847
Slovakia						41,396
Slovenia						9,340
Spain	25,000	711,160	26,000	745,736	26,200	779,572
Sweden	2,344	101,799	2,542	103,623		103,933
Switzerland	3,266	170,670	3,274	178,000	3,351	184,000
Turkey	12,000	235,000	15,000	251,000	16,000	267,000
United Kingdom	11,482	249,600	11,500	255,000	12,075	267,750
<b>TOTAL</b>	<b>142,406</b>	<b>4,446,603</b>	<b>149,312</b>	<b>4,603,026</b>	<b>150,078</b>	<b>4,960,563</b>



# Industrial Statistics

Units

2006

2007

2008

	2006			2007			2008		
	Electrical Lifts	Hydraulic Lifts	Total Lifts	Electrical Lifts	Hydraulic Lifts	Total Lifts	Electrical Lifts	Hydraulic Lifts	Total Lifts
Austria	2,790	210	3,000	2,976	224	3,200	2,321	175	2,496
Belgium	2,532	146	2,678	2,346	148	2,494	2,402	151	2,553
Czech Republic	1,460	120	1,580	1,620	110	1,730	1,830	90	1,920
Denmark			710			780	800	50	850
Finland			710			890			895
France	10,117	585	10,702	10,801	385	11,186	10,617	401	11,018
Germany VDMA	8,444	1,065	9,509	8,502	1,029	9,531	8,910	852	9,762
Germany VFA	90	45	135	131	77	208	142	80	222
Germany	8,534	1,110	9,644	8,633	1,106	9,739	9,052	932	9,984
Greece	1,200	6,800	8,000	1,260	7,240	8,500	950	6,150	7,100
Hungary	817	300	1,117	960	286	1,246	910	260	1,170
Italy	9,352	4,391	13,743	9,453	3,772	13,225			13,400
Luxembourg			420			406			410
Norway	1,002		1,002	1,088		1,088	833		833
Poland			2,600			3,214			3,410
Portugal	3,500	600	4,100	3,200	500	3,700	3,200	200	3,400
Spain	28,053	2,238	30,291	32,031	2,541	34,572	31,569	2,267	33,836
Sweden	1,248		1,248	1,383	158	1,541			1,310
Switzerland			6,129			6,117			5,995
The Netherlands	2,958	108	3,066	2,767	102	2,869	2,788	125	2,913
United Kingdom	6,421	1,547	7,968	6,742	1,624	6,742			7,079

# SNEL PROGRESS UPDATE

## SNEL (Safety Norm for Existing Lifts) EN 81-80

- The standard is not compulsory, but is a “state-of-the-art” pressure on operators and owners
- ELA pushes for legislation at national level
- Success means large programmes of safety upgrading and modernisation
- SNEL is based on risk analysis (74 identified risks) + several risks specific to Central Europe
- The European Commission has now specifically linked EN 81-80 to Recommendation 95/216/EC, as the right standard for existing lifts. We hope the Recommendation will be included in the revision of the Lifts directive 95/16/EC

# SNEL PROGRESS UPDATE

- **SNEL (Safety Norm for Existing Lifts) EN 81-80**
  - Countries publish new legislation that integrates EN 81-80 “filtering”:
    - Belgium (2003)
    - France (2004)
    - Spain (2005)
    - Italy (2005)
    - Austria (2005)
    - Greece (2005)
    - Sweden (2006)
    - Norway (2008)
    - Slovenia (2008)
  - Germany & Luxemburg (1995) are covered by the “Betriebssicherheitsverordnung”, applying SNEL



# SNEL PROGRESS UPDATE

## ■ The case of France (1):

- France has the oldest installed stock of lifts in Europe
- A dramatic series of fatal accidents involving kids happens in 2002 and 2003
- Minister Gilles de Robien imposes a law fast
- The lift federation + AFNOR help greatly
- A law is published on 3/7/2003 + decrees in 2004 identifying 44 SNEL risks
- Risks must be eliminated in 3 phase of 5 years (phase 1 ends 3/7/2008)
- Revised cost of works (2007): 8 Billion € in 15 years





# SNEL PROGRESS UPDATE

## ■ The case of France (2)

- 440,000 “old” lifts are concerned, mainly from 1960-1970's
- Average cost of modernisation/lift = 15,000 € to 20,000 € (7,000 € min. to 25,000 € max.)
- Total cost = 8 Billion € in 15 years (7.92 B.€)
- More works are being carried out “up front” than expected
- It represents 4 x the yearly turnover of sector
- Calls for tender & orders started for real in 2<sup>nd</sup> half of 2007
- Industry recruited more than 800 new technicians in 2005 and 2006, 1,000 technicians in 2007

# SNEL PROGRESS UPDATE

## ■ The case of France (3)

- For the first time in 2006, 2007 and 2008, modernisation turnover is bigger than new installations (50% increase)
- Modernisation and maintenance represent 1.54 billion €, 70% of lift market
- 11% of the lift stock is under modernisation (3% before legislation)
- Turnover increase of 10%/year and growing for large and small companies alike
- Turnover of components manufacturers much higher
- Owners' associations reluctantly collaborate with industry

# SNEL PROGRESS UPDATE

## ■ The case of France (4)

- Maintenance inspections must happen every 6 weeks
- The new legislation also covers maintenance contracts, and links it to the 3 phases of the SNEL application
- Since owners were late in ordering, the government has decided to postpone the application of the 1st phase by 2 years, to July 2010, but the movement is on and not being questioned anymore



# SNEL PROGRESS UPDATE

## ■ European SNEL perspective:

- If SNEL were applied all over Europe (3,500,000 lifts to modernise, built before the application of LD 95/16/EC), it would represent an average increase of turnover over 15 years, of some 70 Billion €
- ELA and national associations try to keep the momentum obtained in the last 3 years
- Probably only partial application can be expected.
- SNEL is a major boost to safety of lifts but also for accessibility, for employment in the lift industry in Europe and energy efficiency over a period of 20 years

# SNEL PROGRESS UPDATE

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## ■ **Specific situation of Central Europe:**

- Poland and other countries have a large number of ageing residential lifts
- Owners of flats have little resource to invest in modernisation, or even maintenance!
- Accident rate could increase with the ageing of poorly maintained lift stock
- Occupants of residential buildings are among the poorest, oldest citizens and include people with disabilities

# SNEL PROGRESS UPDATE

Then the global economic crisis hit Europe !

« Now is the time to act! »

Jose Manuel Barroso

Indeed!

ELA asks the European Commission to list « lifts & escalators » in the Stimulus package prepared by Europe





# SNEL PROGRESS UPDATE

Central Europe, from the Baltic countries to Rumania, live « a crisis in a crisis »:

- Banks & financial institutions stop investing & repatriate their capital to save themselves at home
- Construction has simply stopped
- Governments have no money for a « Recovery plan »
- Central Europa badly needs support from the European Commission in structural funds

# SNEL PROGRESS UPDATE

- ELA and several national associations have asked repeatedly to be included in the « Recovery package » to be launched for Central Europe:
  - The lift industry employs skilled workers: jobs can be saved and even created with the application of SNEL
  - Existing lifts in ex-social residential buildings are in a very bad state of repair. Tens of thousands are DANGEROUS for the users and mechanics
  - New residential owners have not a eurocent to invest; the government (and Europe) must help with incentives
  - SNEL will improve accessibility for senior citizens and the disabled
  - SNEL modernisation implies better energy efficiency

**SNEL IS A TRANSVERSAL SUPPORT OF THE ECONOMIC ACTIVITY**

# SNEL PROGRESS UPDATE

- ELA & national associations have asked for a « **package** » of **1.5 billion € for Central Europe** to the Commissioner for Regional Affairs, **Danuta Hübner**.
- The « recovery package » would come from structural funds, to be complemented by a 50% participation of national governments.
- Lifts safety upgrading (SNEL) can be implemented FAST. It should be supported NOW by Europe & the national governments





# **SNEL PROGRESS UPDATE**

**Thank you for your attention**

