

# ELEKTRINET™

THE INTERNATIONAL JOURNAL OF ELECTRICAL MARKETING AND MANAGEMENT

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## Fàilte gu Dùn Èideann! Welcome to Edinburgh!

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By Simon Barkes  
EDA EUEW Representative

It is with great pleasure that the U.K. Electrical Distributors Association (EDA) welcomes delegates to the 56<sup>th</sup> Annual General Convention of the European Union of Electrical Wholesalers (EUEW), here in Edinburgh, the capital of Scotland.

It is eleven years since the EUEW was last in the U.K., and since then the old Electrical Wholesalers Federation (EWF) has given way to its new incarnation the EDA. This year in February, Nigel Ellis after forty years service to our association, to EUEW, and to our industry, has retired and made way for Ray Evans, our new director. We all wish Nigel and his wife Pam all the best for a long and happy retirement.

It has also been a year of growth for EDA in which 26 new wholesale/distributors have joined, bringing our membership to 77 companies, which altogether account for approximately 80% of the U.K. market.

The EDA manufacturer affiliation scheme continues to grow with 50 supplier companies now affiliated. Increased numbers put pressure on the various networking events, but this is a quality problem that growing associations will find solutions for.

The U.K. market has been very difficult for three years now, with members struggling to maintain turnover levels and margins under pressure. The immediate outlook involves concern with

the government making severe cuts to expenditure in the public sector. However, there are signs of genuine growth within the sustainability sector of all markets.

But our situation offers the same mixed bag of opportunities and challenges that other countries and electrical wholesaling communities face. Most of us have faced declining revenues and the associated necessity for reducing overheads. The outlook in many parts of Europe is not encouraging while some, particularly in northern Europe, are seeing strong export-led growth.

While the fragility of some countries' public finances promises uncertainty for years to come, there is plenty of evidence to suggest that the energy sector will experience a period of tremendous opportunity.

So, we hope to paint a picture of some of these opportunities in



Simon Barkes

our working programme here in Edinburgh.

#### *The Business Programme*

We shall start with a few welcoming remarks and a short briefing from EUEW President Christof Bonn on the efforts undertaken over the last year by our 16-nation confederation.

Then our first speaker will be Trevor Williams who is the

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Edinburgh Castle will be the focus of a special presentation at this year's General Convention.

# The Road To Recovery Goes On and On

By John Paul Quinn.

In Tolkien's *Lord of the Rings*, Bilbo Baggins warns his nephew Frodo: "This is a dangerous business ... The road goes ever on and on, and if you don't keep your feet, there is no knowing where you might be swept off to."

Electrical wholesalers in many parts of Europe have apparently emerged from the dark days of recession, but for electrical wholesalers in the United States, it seems that the recovery they are allegedly going through has been going on and on but never really getting them anywhere. That's a dangerous business indeed, and perhaps wholesalers in the U.K. and Europe are going through a similar set of circumstances. So there may be some virtue in a comparative analysis of shared problems and opportunities.

The creeping, petty pace of the comeback isn't the only worry. A significant number of economists in the U.S. have not ruled out the much-feared "double dip" – a second, follow-on recession coming within 18 to 24 months, and the banking community is the most pessimistic on this possibility.

At any rate, conventional wisdom has been that in the U.S., the Great Recession ended in June of 2009. However, in the electrical distribution industry, sales in the first quarter of 2010 were down 3% from the similar period of the previous year, reflecting a nine-month lag behind the recovery of the national economy.

The forecasters, who were hoist on their



**John Paul Quinn**  
Editor and Publisher

own overly optimistic prognostications last year at this time, are now talking in terms of a period of "stabilization," which is presumably a second-rate form of recovery and which also implies a lack of any real movement.

Electrical industry forecasting firm DISC Corp. expects 2010 to have shown a meager increase of 3% for distributor sales, looks to a 5% gain in 2011, and possibly a healthy 15% advance in 2012. That puts real recovery off for more than a year.

The independent industry journal, *Electrical Wholesaling* magazine, predicts a similar 5% growth for this year, based on a survey of some 225 distributors. Additionally, in an economic roundtable discussion hosted by the National Association of Electrical Distributor's *TED* magazine, generally there were expectations for a 3-6% rise as the slow recovery continues.

Sources in the building field, upon which electrical distributors rely so heavily, are generally agreed that construction is still struggling out of the recessionary mode, but there is some optimism.

According to the Associated General Contractors of America, it is expected that the long beleaguered residential construction sector should gain 5-10% over 2010, with public and private nonresidential increasing 5%.

But here again there are persisting

troublesome conditions. There is still a glut of single-family housing on the market, due primarily to the ongoing high rate of foreclosures on mortgages. In fact, October of 2010 was the twentieth consecutive month that at least 300,000 homeowners were foreclosed by mortgage banks.

Because of this, statistical analysis firm McGraw-Hill Construction believes that the strongest recovery in the residential area will be in startups of multifamily dwellings including apartments and condominiums with a notable increase of 23%. Another consultancy, Reed Construction Data, predicts combined housing starts up 25% this year, and up another 44% in 2012.

Remodeling and energy retrofits of all pre-1973 housing is another lucrative potential, growing during the recession from its traditional 40% of the residential market to 70%, according to the National Electrical Contractors' Association publication, *Electrical Contractor* magazine. Ongoing quarterly growth of 12% in this area is expected this year.

Needless to say, in response to the question "What will sell the most in any market sector as the economy returns?" the answer is "Anything green, green, green."

Construction industry sources concur that the green building market has virtually exploded in the last five years, going from \$10 billion in 2005 to \$71 billion in 2010, and it is conjectured that five years from now half of everything built in the U.S. will be green.

For both distributors and contractors, this lingering period of relative inactivity is the time to learn as much and as quickly possible everything they can about anything green, so that when the economy really does recover they will be ready to provide their customers with the energy-efficient products and installations that they will demand.

The road to recovery may be tedious and tiresome, but as Bilbo warned, distributors would be well-advised to keep their feet – and also their wits about them – in these still troubling times.

ELEKTRINET.

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## From the EUEW Presidents

*Christof Bonn, CEO of independent distributorship BTF & Co. headquartered in Coelbe, Germany, concludes his two-year term as President of EUEW here in Edinburgh.*

*When asked what the past two years have been like, this is what he had to say ...*

**W**hen I took office in Rome two years ago, the global financial crisis did not give us any reason to be optimistic about the future.

I am happy to say that today the dark clouds over business in general and our branch in particular are gradually disappearing more and more.

I believe I can say honestly and accurately that over these last two years, EUEW has been quite busy. We set some goals that we felt we could at least get started on even if we did not reach them.

Obviously, we had to continue to strengthen our position in the three-tiered process of doing business with



**Christof Bonn**

our manufacturer and contractor partners, but there were two other urgent questions we had to try to find some answers to as a European organisation:

- How can we as electrical wholesalers share in the growth and profits relating to the ongoing technological revolution and the global energy-saving imperative?
- How can we best represent

our interests in terms of the ongoing European political directives?

While we have begun to address these key questions, I am sure they will continue to challenge us for many years to come.

Now, there is no doubt that we are living in a time of rapid technological advancement of a magnitude not seen since Thomas Edison invented the incandescent lamp, and the main issues for our industry are:

- LED solid-state lighting
- Smart metering
- Regenerative energy production
- Internet-based networking
- E-mobility

At every conference we attend, including this one, we are confronted with at least one of these complex subjects, and the questions we have to ask ourselves are: Who will manufacture the products for these technologies, who

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*At this 56<sup>th</sup> EUEW General Convention here in Edinburgh, Yvan Dejaeghere becomes President of the organization. He has more than 20 years experience in the electrical industry on both the manufacturing and distribution sides, and is the CEO of the wholesaling company Technische Unie which is headquartered in Amstelveen, the Netherlands, and is part of the multinational Sonepar Group based in Paris. He is a member of the corporation's executive committee and the chairman of its international logistics steering committee.*

*Mr. Dejaeghere himself is from Flanders in Belgium. Having been trained as a student in the discipline of chemistry, he says he remains committed to the processes of analysis and synthesis in his work.*

*ELEKTRINET took this opportunity to ask him a few questions about the European electrical industry in general and his own goals during his two-year term as EUEW President, beginning with what he sees as the foremost opportunities and risks for wholesalers today.*

**DEJAEGHERE:** We are emerging from a difficult economic period that has impacted both the industrial and construction sectors of our customer base. The industrial segment is recovering, and we are looking for a similar improvement in building.

But with this recovery and regrowth, there is also an element of risk, and that has to do with a potential shortfall of enough technically skilled young people entering the electrical industry. This runs throughout the supply chain, and we share this problem with our suppliers and our installer customers.

I believe we have to focus on promoting our industry to interest these young people, many of whom don't even know that the wholesaling sector exists or how it functions. We have to reach out to them – and on their own terms – because they are critical to the return of growth in our business and to helping us reorganize our traditional thinking about logistics.

**ELEKTRINET: What do you mean by "on their own terms"?**

**DEJAEGHERE:** This is the new generation of decision-makers which



**Yvan Dejaeghere**

will significantly influence everything we do, and they carry a very interesting assortment of intellectual property in their backpacks.

First, they have a vision of responsible sustainability; and second, they are computer freaks – and I mean this in the very best sense of the phrase. They

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# News From the Federations

*The European Union of Electrical Wholesalers (EUEW) is a 16-nation organisation representing the interests of the electrical distribution channel. It comprises the national associations of these member countries to which belong some 800 companies with more than 5,700 locations and employing a workforce of approximately 67,500.*

*Founded in 1956, a year before the prototype European Common Market which would evolve into the present European Union (EU), the EUEW has grown from a core network of federations struggling in postwar economies to an alliance of professional distribution associations, including most recently those of three former East Bloc states.*

*Currently, the members: Belgium, Estonia, Denmark, Finland, France, Germany, Hungary, Italy, Malta, Norway, Poland, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.*

*The thousands of products these firms distribute are produced by the leading national and multinational manufacturing companies in the electrical industry.*

*Each of the national federations belonging to the EUEW has an active agenda of programmes to assist their member companies in providing more value-added services to customers including contractors, retailers, electric power companies, municipal authorities, industrial plants, and others.*

*In this column, ELEKTRINET is pleased to present an overview of the European scene by Wolfgang Jauch, managing director of consultant firm Euro Marketing + Research in Waiblingen, Germany. Following that are reports from a selection of various national executive directors on the status quo of their national economies, the condition of their electrical markets, and the activities of their respective federations.*

**FROM: Wolfgang Jauch  
Euro Marketing + Research**

The figures for the first quarter of 2011 are impressive evidence that things are on their way up again in the electrical industry – and clearly so.

The year 2011 is shaping up to be a definitely good one. If – as expected – commercial construction and private home building also get moving again in the course of the next few months, a good 2011 could be followed by an excellent year 2012.

A comparison of the business figures for the first quarter of 2011 with last year's reveals clear increases in turnover coupled with a simultaneous reduction in debts. Consequently managers are looking forward optimistically to the future and have already raised their forecasts for the current business year.

The essential factors in the emerging growth are the construction sector on the one hand and energy saving and striving for energy efficiency in every form on the other – that is, the ecological modernization of industrial society.

A variety of electrical companies have managed to stage a significant recovery, with many of them also experiencing a slow increase in new building activities in the commercial sector, and the same is also expected for residential building from the middle of the year onwards.

**From: Jens-Dag Vatndal  
Elektroforeningen -- Norway**

A moderate cyclical upturn in the Norwegian economy in the second half of 2010 is expected to be replaced by slightly

higher growth. Greater domestic demand is driving the upturn, while the growth impetus from abroad is expected to be modest in the next few years.

The wholesaling turnover in Norway went down 1.7 % in 2010 compared to 2009. But the market had a positive trend in the second half of 2010, and especially in the last three months the wholesale turnover had increased compared to the same quarter in 2009. In the first three months in 2011 the wholesaling turnover increased 2.2 % compared to the same period in 2010, and for the year 2011 we expect turnover growth to be 4-5 % for the wholesaling business.

During the economic downturn, the segment of our industry which had a serious decline was new construction market. and next the segment of new commercial buildings. The segment of renovation didn't fall but had slow growth. Today we see that the new residential segment is increasing very strongly, and new commercial buildings are stabilized at an acceptable level and will have a slow growth over the next few years.

**FROM: Jörg Reimer  
VES – Switzerland**

After a decrease of 4.7% in 2009, electrical wholesaling in Switzerland clearly recovered with an increase of 8% in 2010.

The first quarter of 2011 was quite strong, up noticeably from that period last year.

It should be noted that electrical wholesaling in Switzerland was not really affected by the global economic downturn.

A strong building industry, especially in the residential sector, helped electrical

wholesaling and is still doing so, at least so far this year. Later on, a slight weakening is probably to be expected.

The photovoltaic market is quite promising and offers significant opportunities.

**From: Daniel Ribeiro  
AGEFE – Portugal**

In 2010, wholesaling turnover in Portugal was down 2.9%, and year-to-date the trend continues to be off 2 - 3%.

Unfortunately, in Portugal there has been no general economic recovery. We are really in a serious recession. Our GDP went down for the second consecutive quarter, and we have asked for IMF/EU/CEB aid to help us solve our sovereign debt problem.

The only vaguely positive thing that can be said is that the electrical market is not as bad as it could be.

**FROM: Björn Högborn  
SEG – Sweden**

The recovery in Sweden has been quite strong with the highest GDP increase since 1960. But we still haven't reached the market level we had in 2008. The building of residential dwellings has seen the biggest increase, with industrial construction in second place.

The vigorous development of the Swedish economy is due to a combination of factors. The fundamental one is a strong financial position in both the private and public sectors, making it possible for consumer consumption as well as investment to increase. Moreover, the development of the world market remains favorable to Swedish exports.

# News From the Federations

For wholesalers, 2010 turnover was up 1.9% from the previous year. The first quarter of 2011 was up 11.7% over the similar period last year, and we forecast a 7% increase overall for the entire year.

Together with the federation for the electrical installers we are planning a marketing campaign which will continue for at least three years. One of the targets is to raise the public awareness of the skills of the electricians. This will help them to market and sell more complex solutions in energy efficiency, comfort and security.

**FROM: Yves de Coorebyter**  
**ICGME – Belgium**

Wholesalers in Belgium have experienced three years of dramatic change as follows:

2008 up 4.6%; 2009 down 6.6%; and 2010 up 4.9% .

An important part of the current growth is mainly due to the increase of the prices of raw materials, especially copper which will have a positive effect on wholesaler turnover. Due to this, we were able to return rapidly to a relatively normal business level.

For 2011, we expect that the slowdown in residential building will be compensated for by price increases and growing industrial business. In the first few months of the year, we saw a gain of 11.4%, although we feel this level of increase will not continue throughout the year.

Our association has been very active in its cooperative efforts with the installers' and manufacturers' associations in Belgium since we are under pressure from the European Union to develop low-energy housing, smart meters and smart houses, electrical cars, and new types of lighting. This is not an evolution but a revolution that will definitely change our business model in a relatively short time.

**From: Tarja Hailikari**  
**STK -- Finland**

Electrical wholesale volumes were up 6.1 % in 2010 compared to the previous year, and the first quarter of 2011 was up 14.7 % compared to the similar period a year before.

The recovery of the electrical wholesaling market actually started in the second quarter of 2010, and is expected to continue.

The Finnish economy is doing quite well and the expectations for this year are optimistic. GDP is forecast by the Ministry of Finance to grow 3.6 % this year and 2.7 % next year.

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## “What If We Rewired The Castle?”

One of the more unique presentations at any EUEW General Conference will be this year's group panel report on “The Edinburgh Castle Project,” a theoretical exercise focusing on what would be required to bring the electrification and lighting of the structure up to date.

Considerations would be ease of installation, aesthetic appeal, efficient energy use, reduced maintenance, improved sustainability, ease of accessibility for future upgrade, and reduced running costs.

Presentations will be given by Colin Low of McGill Electrical Ltd, Laurence Allison of Glen Dimplex, Mike Simpson of Philips, Stephen Barker of Siemens, and Andreas Betterman of OBO Betterman.

The best guesses about the present lighting installation are that it is about 20 years old and was originally high-pressure sodium, producing a yellow glow, and

more recently it was re-lamped with metal halide to provide a white light effect.

The greatest challenge for such a renovation undertaking would be dealing with the cable infrastructure on an historically listed building, but to a large extent it would be possible to use existing cables and routes.

Originally, there had been lighting of the rock face of the mount foundation, but this was removed because of the extreme difficulty for servicing. But the Castle Project group speculated that this could be reinstated using long-life LED technology.

“The new lighting would all be LED, offering potential savings of at least 40% compared to the existing installation,” said Simpson of Philips. “We would also introduce a control system so each individual floodlight could be dimmed or change color from warm to cool white that will enable subtle definition of different elements to be achieved. We would avoid saturated colors for lighting such a stately building.”

People tend to be wary of new high-tech solutions that would change the appearance of a landmark structure they have always known and loved, and Simpson had this comment:

“Somebody asked me what ‘Braveheart’ Wallace and Robert the Bruce, whose statues guard the gates of the castle, would think of the new lighting look. I believe that it would look the way it did to them by moonlight.”



*The Castle By Moonlight*

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**From President Bonn***(Continued from Page 3)*

will distribute them, and who will install them?

We are not living in a neat public park, but in a jungle where the rule is simple: survival of the fittest. New competitors for manufacturers, wholesalers, and installers are appearing on the horizon every day, and some of them are giants – telecommunications companies, energy suppliers, automobile makers, and cooperative ventures formed among some of these.

Under these circumstances, we have to work together on the partner-federation level to survive, with organisations like AIE, ELC, CELMA, and the Light & Building Exhibit organisers to stay informed and to reassess among ourselves the role of the electrical wholesaler.

We are no longer simply conveyors of

product but communicators of critical information and the key logistical link between manufacturer and installer. The best product will not work if the contractor doesn't understand how it functions.

This view of the expansion of our role was confirmed when some of us attended the NAED Annual Leadership Summit last year and visited with some of our U.S. colleagues.

And here at home in Europe we have had to become more proactive as lobbyists in Brussels, because that is where directives like WEEE and the ban on incandescent lamps are hatched.

We are now a registered lobbyist in the EU Parliament and have taken part in hearings in consultation with AIE or our manufacturer partner federations.

In addition, we have expanded our

statistical database for the European wholesaling market which includes numbers from other members of the supply chain.

And we have welcomed back to EUEW the Danish federation, and hope that the Netherlands will also be rejoining soon. And speaking of the Netherlands, that is where our incoming EUEW president comes from – Yvan Dejaeghere.

These two years have been exciting for me, and I thank Yves de Coorebyter and Bruno van der Stappen at EUEW headquarters in Brussels, and all of the leaders of the national federations for their support and assistance, but mostly for their ideas.

It has been the experience of a lifetime for me and one I will never forget.

Thank you, and wieder sehen.

**From President Dejaeghere***(Continued from Page 3)*

believe in 'green' and they intuitively understand the imperative of dealing more and more in terms of IT, e-commerce, on-line transactions, and interaction with the social media and the consumer press.

In other words, they have the mindset and the skills to operate the virtual counter operation that is the future of our business. We have to reach out to these young people and as an industry be prepared for them and their ideas so that they can help us stay ahead in these ever-changing times.

**ELEKTRINET: Besides the challenge of recruiting this new workforce, what else should the electrical wholesaler be thinking about?**

**DEJAEGHERE:** There will be an increasing demand for a supply chain that is better organised than it has been in the past or as it is now. We will be dealing with a greatly enlarged array of products and with much more emphasis on JIT flow from manufacturer through distribution to the end-user.

It is the distributor who has to gather together a constantly increasing volume of both products and information, and this is a huge challenge.

The absolute core value that the wholesaler adds is organising the communications and logistics of the supply chain.

**ELEKTRINET: What are your major objectives as you begin your two-year term as EUEW President?**

**DEJAEGHERE:** I would like to discuss with as many business leaders as possible in our industry how we can improve the supply chain system. This would include the leadership of the 16 federations belonging to EUEW, and all of our industry partners.

First of all, the supply chain itself must be revitalised to become more professional and efficient. Next, I would like to work to more clearly define what has to be done to solidify the critical position of the distributor in the chain.

I think that too often the wholesaler takes a passive role and relinquishes some of his responsibilities in the chain. Distributors have to maintain their status and not depend on the manufacturer to do 'the heavy lifting,' as I believe the saying is in the U.S.

We as wholesalers have to focus on who we are and what our role is, because our

importance will only increase as the product inventory and the information and logistics flow become more complex.

**ELEKTRINET: So wholesalers should be re-evaluating who they are and what they do?**

**DEJAEGHERE:** Yes. And I like that English word – 'wholesaler.' The equivalent word in many European languages has its basis in large quantities. That is, this is a businessman who buys in large quantities and then sells in small quantities at a good margin.

But the English word 'whole' means containing all the parts of something, and that is what we really do. We put together a whole package for an installation – cable, lamps, switches – and we also provide service and information, and this is our 'whole' value-added package.

And taking it one step further, we also are the communications and logistics link between manufacturers and our customers.

Going back to my training in chemistry, I like to see all the elements – partners, products, services – interact to produce the best possible result.

**ELEKTRINET: Thank you.**

### ***From the Federations***

***(Continued from Page 5)***

The new name of the Finnish association has been the Finnish Electrotechnical Trade Association (STK) since January of this year. This describes the role of the association as a promoter of the cooperative competitiveness of the entire supply chain. The association provides comprehensive market and product information services as well as actively promoting and defending the interests and image of the electrotechnical branch.

#### ***FROM: Hans Henning VEG – Germany***

Member companies posted a very strong 13% increase in sales volume in 2010.

Following that, the first quarter of this year was up 5% compared to the similar period in 2010.

The consensus is that the crisis has definitely passed in Germany and both exports and imports are at record levels.

Last year, electrical wholesalers did a booming business in photovoltaics, which has cooled down because of declining subsidies. However, this year the upturn is more broadly based on a wide range of products.

VEG itself has been actively engaged in lobbying activities both on the European level and in Germany to represent the wholesalers' interests.

### ***Welcome To Edinburgh***

***(Continued from Page 1)***

chief economist of Lloyds TSB. He will provide a clear profile of the current business environment in which we operate, and what we may expect in the near future.

Our next speaker, Professor David Gann, head of innovation and entrepreneurship at the Imperial College in London, will talk about the "Rise of Smart Cities." Smart technology is going to make a huge difference to the way we use energy and will also create enormous commercial opportunities for the electrical industry right down to householder level.

The next two sections of our programme will be introduced by our guest facilitator, Janette Harken, who is director of policy and research at the Scottish Council for Development and Industry. This is what we have called the 'Castle Project.'

For those of you visiting Scotland for the first time, Edinburgh Castle is the architectural symbol and icon of the Scottish nation, its foundation dating back to the 9<sup>th</sup> century. So we wondered if it needed to be rewired.

The concept is simple; we have asked a prominent Scottish contractor to survey the electrical installation at Edinburgh Castle, laying out what is there and what it delivers, and reporting their findings.

This detailed survey has been given to all our four sponsors and they will, in turn, make a presentation explaining how, within the context of their own experience, they would use new technology to improve the performance of the installation at the Castle.

This improvement would reflect ease of installation, aesthetic appeal, efficient energy use, reduced maintenance, improved sustainability, ease of accessibility for future upgrade and reduced running costs.

Presentations will be given by Colin Low of McGill Electrical Ltd, Laurence Allison of Glen Dimplex, Mike Simpson of Philips, Stephen Barker of Siemens, and Andreas Betterman of OBO Betterman.

All this with an eye to the EUEW audience, who are interested to know what type of products to be selling in the future and how much technical expertise they will have to have on board in order to do so, even if they are not rewiring a castle.

This section of the programme will end with a question-and-answer session facilitated by Janette Harken, and we strongly encourage audience participation.

Following this, Brian Smithers, the EDA president, will then give a short presentation on the opportunities new technologies offer the electrical distributing industry.

Our final speaker will be familiar to some of you. He is Ray Hammond, a futurologist who will give us his views on the issues which will shape our world ten to forty years from now. We expect his observations will be both entertaining and thought-provoking.

The business programme will conclude with a few words about our venue for next year's General Convention in Holland.

#### ***The Social Programme***

While the delegates are working we have organised an interesting agenda for their partners.

Edinburgh is a beautiful city with a long history and a wonderful heritage. There is much to see and plenty to learn. We have arranged a tour for the morning, to provide a flavour of that heritage.

After lunch at one of Edinburgh's iconic examples of commercial architecture, the Dome Restaurant on George Street, the partners are free to experience the city for themselves in the afternoon. There will be a guide on hand if any assistance is required.

Dinner on Friday night is at Hopetoun House, a manorial estate in the nearby countryside which will, we hope, open your eyes to the unique warmth of Scottish hospitality.

For those who stay the weekend, we have an interesting tour of the Lowlands of Scotland taking in Stirling Castle, Loch Lomond, and the Falkirk Wheel.

Stirling Castle was besieged by both William Wallace and Bonnie Prince Charlie, and it was also where Mary Queen of Scots was crowned.

We'll pass through the Trossachs National Park, an area immortalized by Sir Walter Scott in his poetry and novels, and nearby which is the grave of Rob Roy MacGregor. Then lunch will be served on the "bonnie banks of Loch Lomond."

We will return to Edinburgh by way of the Falkirk Wheel which is a remarkable rotating boat lift connecting the Forth and Clyde Canal with the Union Canal, opened in 2002 to reconnect Glasgow with Edinburgh.

What promises to be a busy day will conclude with dinner at "The Scotch Whisky Experience," a restaurant that needs no explanation, close to Edinburgh Castle at the top of the Royal Mile.

All of us at the EDA hope that you will find your visit to Edinburgh businesslike, entertaining and worthwhile.

And we also hope to see you back again quite soon.