

STRATEGIC BUSINESS PLAN (SBP)

IEC/TC OR SC: TC 110	SECRETARIAT: Japan	DATE: 2021-11-14
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Please ensure this form is annexed to the Report to the Standardization Management Board if it has been prepared during a meeting, or sent to the Central Office promptly after its contents have been agreed by the committee.

A. STATE TITLE AND SCOPE OF TC

Are there any new or emerging trends in technology that will impact the scope and work activities of the TC? Please describe briefly.

Do you need to update your scope to reflect new and emerging technologies? If yes, will these changes impact another TC's scope or work activities?

If yes, describe how these will impact another TC(s) and list the TC(s) it would impact

Title: Electronic displays

Scope: Standardization, in the field of electronic displays and specific relevant components, of terms and definitions, letter symbols, essential ratings and characteristics, measuring methods, specifications for quality assurance and related test methods, and reliability

Note: Where actual or potential overlap in scope with other TCs/SCs such as IEC/TC 47, SC 62B, TC 76, TC 77, TC 100, TC 111, TC 119 and TC 124 exists, coordination through liaison or JWG with the concerned TCs/SCs should be maintained or actively pursued.

Remark: The trends in technology and in the market are described in item F. The above scope covers emerging challenges from these trends.

B. MANAGEMENT STRUCTURE OF THE TC

Describe the management structure of the TC (use of an organizational chart is acceptable) (should be integrated by CO automatically) and, if relevant (for example an unusual structure is used), provide the rationale as to why this structure is used.

Note: Check if the information on the IEC website is complete.

When was the last time the TC reviewed its management structure? Describe any changes made. When does the TC intend to review its current management structure? In the future, will the TC change the current structure, for example due to new and emerging technologies, product withdrawal, change in regulations etc. Please describe.

Make sure the overview includes:

- any joint working groups with other committees,
- any special groups like advisory groups, editing groups, etc.

Officers:

Chair: Mr Xiaolin Yan (CN)

Secretary: Mr Yoshi Shibahara (JP)

Assistant Secretary: Mr Kei Hyodo (JP), Mr Shin-ichi Uehara (JP)

Technical Officer: Ms Suzanne Yap Geok Sim

Working Groups (WG), Project Team, Maintenance Team, ad-hoc group, and advisory groups:

- WG 6: 3D Display Devices (3DDD)
- WG 8: Flexible display devices (FDD)
- WG 9: Touch and interactive displays
- WG 10: Laser displays
- WG 12: Eyewear display
- WG 13: Optical measurements of electronic displays (OPT)
- WG 14: Durability test methods for electronic displays (DTM)
- WG 18: Organic light emitting diode displays (OLED)
- WG 19: Display lighting unit (DLU)
- PT 63340: Electronic displays for special applications (SPA)
- MT 61747: Liquid crystal display devices (LCD)
- AG 11: Advisory Group on Strategy (AGS)
- AG 15: Advisory Group for Project allocation (AGP)

Remarks:

- AG 11: The Advisory Group on Strategy (AGS) has been set up since 2013 to advise TC 110 on strategic business plans, specifically identifying and making recommendations on the TC 110 grand roadmap, WG structure and establishment of projects in accordance with market needs.
- TC 110 reviews the management structure every year based on the recommendations of AG 11.
- AG 15: The Advisory Group on Project allocation (AGP) has been set up since 2018-01, to advise TC 110 Secretary for allocation of new proposals.

C. BUSINESS ENVIRONMENT

Provide the rationale for the market relevance of the future standards being produced in the TC.

If readily available, provide an indication of global or regional sales of products or services related to the TC/SC work and state the source of the data.

Specify if standards will be significantly effective for assessing regulatory compliance.

Worldwide revenue from electronic displays is a hundred and several tens of billion dollars and is steadily increasing with TV and mobile displays leading this growth. Demand for in-vehicle displays is also increasing, and commercial, medical and other fields represent further important markets for electronic displays. The average annual growth rate on panel area base is about 4%, while OLED TV, public displays, automotive displays and near eye displays are achieving the high growth.

Among display technologies, LCD retains the largest share. Shipment volumes of TV, monitor, notebook PC, and smart phones maintain stable growth. The market for OLED is also expanding rapidly, particularly in handheld mobile applications and also in TV applications. OLED is currently the second largest technology. Laser display devices have attracted attention due to their efficiency and sharp light spectrum. LED displays have become widespread in the market, particularly for large displays.

Regarding display performance and specifications, the following points are noteworthy.

- 1) The screen sizes of TVs, PC monitors and mobile displays continue to increase.
- 2) The pixel density in display screens for TV and mobile phones also continue to increase.
- 3) "High dynamic range (HDR)" TV has been introduced to the market in association with the

provision of HDR contents.

4) Several technologies for expanding the dynamic ranges and the colour gamuts of displays have been proposed.

5) Flexible displays, such as foldable smart phones and rollable TV, attract attention as new products.

3D displays such as light field, holographic and aerial displays have seen gains in certain markets and are now seeking further expansion into other applications and technologies.

Having established a market for “E-reader”, electronic paper displays (EPDs) are evolving to incorporate improvements in image quality and features such as built-in illumination.

Touch panel technology has achieved rapid market penetration, first in smartphones and tablets, and then notebook PCs. Worldwide revenue for touch panels has exceeded several tens of billions of dollars and is growing at over ten percent annually. In addition, a variety of interactive technologies (i.e., optical interactions, fingerprint sensing, etc.) are built into electronic displays.

Laser displays have expanded its market, and also expected as a mainstream of the projector market. It has been started from hybrid laser display (laser with phosphor), and RGB-type laser displays are also coming up with the evolution of the visible laser diode.

Flexible displays have been attracting much attention. Non-flat displays employing a flexible substrate have been introduced to the market and growth is expected. Flexible displays that can be bent or folded, for example foldable smart phone or PC, are also highly anticipated.

In terms of new trends, growth in transparent displays is predicted, with wearable or head-up displays anticipated as upcoming key products.

AR/VR technologies using eyewear displays are receiving a lot of attention of B2B and B2C markets. It is likely that these devices will eventually become more prominent in the market.

Digital signage or public displays are also important applications of electronic displays.

Electronic displays have become essential components of Human-Machine Interfaces (HMI) and consequently the production volumes of these displays have increased steadily to meet the increasing demand. Further growth is expected due to the expansion of application of displays, being pushed by smart house, smart office, connected industries, remote office, drone, security camera, and others. Automotive and gaming/e-Sports applications, where the market is growing rapidly, require a special requirement for it.

In the meantime, government regulations, to deal with their impact on the environment have been formulated in many countries. The electronic display industry strives to comply with the various government regulations, in those covering the reuse and recycle of these displays and their components, the reduction of related waste material and energy consumption, and health impact on the end users from e.g. flicker and short wavelength light. TC110 will continue to review these needs as industry practices and government regulations develop.

D. MARKET DEMAND

Provide a list of likely customers of the standards (suppliers, specifiers, testing bodies, regulators, installers, other TC/SC's etc.). Do not specify company names, only categories of customers.

The market for electronic displays encompasses a variety of products, such as notebook and tablet PCs, monitors, TV sets, cellular phones, electronic signage, head-up displays, head-mount displays, eyewear displays, other wearable displays, and all the rest. Standards are required for all aspects of electronic displays such as terms and definitions, measurement methods and customer detail specifications, which include both functional specifications and assessment specifications (product qualification and test specifications). To enable customers to objectively

evaluate different technologies, it is now necessary to begin harmonizing or consolidating the many standards for different electronic displays.

The likely customers of the Standards are as follows;

Suppliers: Manufacturers of materials, components, panels, modules, and products related to electronic displays

Testing: Manufacturers of test equipment, testing body, certification bodies

Customers: Distributors, public offices, and end customers

Academia

E. SUSTAINABILITY DEVELOPMENT GOALS

INDICATE THE SUSTAINABLE DEVELOPMENT GOALS (SDGs) THAT ARE ADDRESSED BY WORK WITHIN THE TC/SC. INDICATE EACH SDG INDICATOR AFFECTED (REFERENCE SPREADSHEET AVAILABLE AT [HTTPS://WWW.IEC.CH/SDG/](https://www.iec.ch/SDG/)), AND PROVIDE SPECIFIC INFORMATION ABOUT HOW THE TC/SC IS ADDRESSING THE SDG. CONSIDER BOTH DIRECT AND INDIRECT IMPACTS OF THE WORK OF THE TC/SC.

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|--|---|
| <input type="checkbox"/> GOAL 1: No Poverty | <input checked="" type="checkbox"/> GOAL 10: Reduced Inequality |
| <input type="checkbox"/> GOAL 2: Zero Hunger | <input checked="" type="checkbox"/> GOAL 11: Sustainable Cities and Communities |
| <input checked="" type="checkbox"/> GOAL 3: Good Health and Well-being | <input type="checkbox"/> GOAL 12: Responsible Consumption & Production |
| <input checked="" type="checkbox"/> GOAL 4: Quality Education | <input type="checkbox"/> GOAL 13: Climate Action |
| <input type="checkbox"/> GOAL 5: Gender Equality | <input type="checkbox"/> GOAL 14: Life Below Water |
| <input type="checkbox"/> GOAL 6: Clean Water and Sanitation | <input type="checkbox"/> GOAL 15: Life on Land |
| <input type="checkbox"/> GOAL 7: Affordable and Clean Energy | <input type="checkbox"/> GOAL 16: Peace & Justice Strong Institutions |
| <input type="checkbox"/> GOAL 8: Decent Work & Economic Growth | <input type="checkbox"/> GOAL 17: Partnerships to achieve the Goal |
| <input type="checkbox"/> GOAL 9: Industry, Innovation & Infrastructure | |

The electronic displays connect people to people and people to machines, and TC 110 is tackling SDGs in various ways, even indirectly. For example, TC 110 will promote standardization to improve the quality and quantity of these communication and help bring to market displays suitable for online education (Goal 4). It can be expected to improve people's lives, health and happiness (Goal 3). It enables the same information to be delivered to people around the world and helps eliminate inequalities (Goal 10). In addition, it helps connect cities and communities to function (Goal 11).

F. TRENDS IN TECHNOLOGY AND IN THE MARKET

If any, indicate the current or expected trends in the technology or in the market covered by the products of your TC/SC.

Great progress has been made with front-plane and back-plane display technologies, and still further substantial improvements are expected in terms of pixel structures, reduced power consumption and image quality enhancements in areas including contrast, colour, uniformity, moving image quality, viewing direction dependence, tone and colour reproduction, and reliability of displays.

Other components, including films and glasses, continue to see improvements in terms of reliability, strength and optical properties. Various kinds of film are used in display devices to boost optical performance, such as viewing direction dependence and optical efficiency.

Quantum dot is a hot topic, with photoluminescent quantum dots being introduced in some products as a down converter in order to improve efficiency and expand the colour gamut of the display. Electroluminescent quantum dot technology is also expected as a new emissive element.

Flexible front-plane, flexible backplane, flexible touch panel and other flexible components are being realised. Their respective reliabilities are also being tested across various potential applications.

Capacitive-based designs are the major touch panel technology. Sensitivity, accuracy and precision, reporting rate, applicability to larger panels, optical properties, reliability and power consumption are all seeing improvements.

Developments in electronic display technologies are too numerous to comprehensively list here.

The future will see the emergence of many new ideas, technologies and applications.

The optical performance of AR/VR technologies using eyewear displays has been improved rapidly.

With the improvement of luminous efficiency and stability, LEDs have come to be widely used as electronic displays in addition to light sources for backlights. Mini and micro-LED attracts attention as a new display technology.

G. SYSTEMS APPROACH ASPECTS (SEE DIRECTIVES PART 1 ANNEX SP)

Does your TC/SC have a need for a systems approach?

If so:

- Will the Systems work be in a single TC or in multiple TCs?
- Will a Standardization Evaluation Group (SEG), Systems Committee (SyC), or Systems Resource Group be required?
- Is your TC/SC work of relevance to ISO?
- Is or are there fora or consortia working in parallel to IEC? Is there a chance to integrate this work in your TC/SC?

This should not only be restricted to the customer/supplier relationships with other TC/SCs indicating types of co-operation (e.g. liaisons, joint working groups) but be of a more generic nature.

The TCs and organizations that are relevant to TC 110 are as follows:

IEC Internal liaisons	IEC/TC 47	Semiconductor devices
	IEC 62/SC 62B	Diagnostic imaging equipment
	IEC/TC 76	Optical radiation safety and laser equipment
	IEC/TC 77	Electromagnetic compatibility
	IEC/TC 100	Audio, video and multimedia systems and equipment
	IEC/TC 100/TA 2	Colour measurement and management
	IEC/TC 100/TA 19	Environmental and energy aspects for multimedia systems and equipment
	IEC/TC 111	Environmental standardization for electrical and electronic products and systems
	IEC/TC 113	Nanotechnology for electrotechnical products and systems
	IEC/TC 119	Printed electronics
Liaison ISO	IEC/TC 124	Wearable electronic devices and technologies
	ISO/TC 22/SC 35	Road vehicles / Lighting and visibility
	ISO/TC 22/SC 39	Road vehicles / Ergonomics
	ISO/TC 159/SC 4	General ergonomics principles
	ISO/TC 172	Optics and photonics
Liaison A	ISO/TC 178	Lifts, escalators and moving walks
	CIE	International Commission on Illumination
Liaison C	ICDM (with IEC/TC 110/ WG 6, WG 10, WG 12, and WG 13)	SID (Society of Information Display)'s International Committee for Display Metrology

The Systems work in multiple TCs. However, the performances and the specifications of display devices can be discussed independently. Hence, Systems Evaluation Group (SEG), Systems

Committee (SyC), or Systems Resource Group are not necessarily required.

H. CONFORMITY ASSESSMENT

With reference to Clause 33 of Part 2 of the ISO/IEC directives, are all your publications in line with the requirements related to conformity assessment aspects?

Will the TC/SC publications be used for IEC Conformity Assessment Systems (IECEE, IECEx, IECQ, IECRE)?

Will any of your standards include test specifications, reproducible test requirements, and test methods?

Are there likely to be special conformity assessment requirements generated by any standards projects? If yes, list which projects.

The standards developed in TC 110 are in line with the requirements related to conformity assessment aspects, and may include test specifications, reproducible test requirements, and test methods. TC 110 publications can be used in conformity assessment systems, but they do not include requirements related to conformity assessment other than requirements which are necessary to provide repeatable and reproducible conformity assessment results.

I. 3-5 YEAR PROJECTED STRATEGIC OBJECTIVES, ACTIONS, TARGET DATES

STRATEGIC OBJECTIVES 3-5 YEARS	ACTIONS TO SUPPORT THE STRATEGIC OBJECTIVES	TARGET DATE(S) TO COMPLETE THE ACTIONS
Developing new application area	Orientation of PT 63340 (Electronic displays for special applications) and PWI 110-54 (Automotive displays)	2022-11 Review
Addressing the following new subjects;		2022-11 review
PWI 110-14	Test method of lifetime of laser display devices	
PWI 110-17	Measurement method of holographic display - optical	
PWI 110-22	Measurement method of volumetric display	
PWI 110-30	Measurement of autostereoscopic display – image quality	
PWI 110-34	Measuring methods of fingerprint recognition performance - On-display transparent optical imaging fingerprint sensing	
PWI 110-35	Measurement of optical performance for laser raster scanning display	
PWI 110-36	Future IEC 63145-30: Durability test methods of eyewear display	
PWI 110-37	Future IEC 63145-201: Optical components of eyewear display	
PWI 110-38	Future IEC 63145-40: Measurement methods of specific functions with sensors for eyewear display	

PWI 110-39	Future IEC 63145-23: Contact lens type	
PWI 110-40	Future IEC 63145-50: User interaction	
PWI 110-45	Measuring methods of crimp force	
PWI 110-46	Specific measurement methods for VR type – Optical properties	
PWI 110-47	Emissive micro display device	
PWI 110-48	Corrective lens for AR/VR	
PWI 110-50	Measuring method of image retention of OLED displays	
PWI 110-52	Quantum dot films and quantum dot diffuser plates used in display lighting unit	
PWI 110-53	Mechanical tests of electronic displays – Static tests	
PWI 110-54	General information of automotive displays for standardization	
PWI 110-56	Optical measuring methods for light sensing interactive displays	
PWI 110-57	Reflective displays	
PWI 110-58	Environmental Tests - Test methods for outdoor application of electronic displays	
PWI 110-59	Measuring method of colour diffraction	
PWI 110-60	Optical characteristics of under screen feature	
PWI 110-61	Measurement of temporal properties	
PWI 110-62	Future IEC 62908-42-10: Measurement methods of motion-tracking image-control response time for interactive projection display	
Note: The progress on the actions should be reported in the RSMB.		