

Düsseldorf, 9 October 2025

## **Joint Statement for a Strong FP10: The Urgent Need for an Autonomous and Prosperous Photonics Industry in Europe**

Photonics is one of the few critical digital technologies where Europe has excelled, with strong leadership in both industry and academia. However, the European photonics industry is under pressure. Driven by a focused investment and development strategy, China's share of the global photonics market rose from 10% in 2005 to 32% in 2022. During the same period, market shares for Europe and North America decreased to around 15% each. Furthermore, China increasingly enters sectors traditionally dominated by Europe, such as laser manufacturing, sensing, and optical components.<sup>1</sup>

The photonics market in China will be self-sufficient in less than four years.<sup>2</sup> This is due to political manoeuvres and technological developments, such as their government's "new productive forces" approach – a more focused, centralised science and technology funding strategy. Science and technology sectors will be prioritised under this new push, with photonics being a key enabler in almost every sector.<sup>3</sup>

Meanwhile, Europe lacks a clear photonics strategy for the upcoming Framework Programme 10. While photonic chips (Photonics Integrated Circuits) are part of the "European Chips Act", this domain makes up only \$1bn of the \$850bn global photonics market.<sup>4</sup> A public-private partnership for the whole sector is needed to make Europe technologically autonomous and economically competitive. The past has shown that a partnership is the right tool for this.

Light technologies have bucked the downward trend, thriving despite global economic turmoil and proving that the photonics industry is of strategic importance to the EU. European photonics industries remained robust in 2019-2022, despite geopolitical issues such as COVID-19, global inflation, and the war in Ukraine hindering trade. Photonics, as a key enabling technology, has major implications for the EU's economic competitiveness, strategic autonomy, and social prosperity.

---

<sup>1</sup> Photonics21. 2024. "Insights into the dynamic photonics market (2019-2022). European prowess, emerging trends, and the paths towards global photonics advancements. Market Research Study Photonics 2024." <<https://www.flipsnack.com/photonics21/market-research-study-photonics-2024/full-view.html>> (14.10.2024).

<sup>2</sup> EE Times Europe. 2024. "China's photonics sovereignty: What now for Europe?" <<https://www.eetimes.eu/china-photonics-sovereignty-what-now-for-europe/>> (14.10.2024).

<sup>3</sup> Science Business. 2024. "Xi Jinping's 'new productive forces': what researchers need to know." <<https://sciencebusiness.net/news/r-d-funding/xi-jinpings-new-productive-forces-what-researchers-need-know>> (14.10.2024).

<sup>4</sup> Future Market Insights Inc. 2022. "Photonic Integrated Circuit Market." <<https://www.futuremarketinsights.com/reports/photonic-integrated-circuit-market>> (16.10.2024).

Specifically, photonic technologies play a critical role in numerous strategic EU value chains and industrial ecosystems, such as **space, security and defence, augmented and virtual reality for virtual worlds, high performance computing, quantum computing and artificial intelligence, health, fusion power as renewable energy, digital infrastructure, industry 5.0 and manufacturing, automotive and mobility, and agriculture and food.** Photonics acts as a foundation for innovation across these value chains, enhancing Europe's technological sovereignty and competitiveness while supporting the green and digital transformation. It is high time for a strong Framework Programme 10, reflecting the urgent need for an autonomous and prosperous photonics industry in Europe.

We, the undersigned companies, urge the EU institutions to:

1. **Establish a €2 billion stand-alone programme for photonics** in the 2028-2034 FP10 to drive €6-8 billion in industrial co-investment in photonics R&I in Europe. Photonics is vital to 20% of the EU economy, and drives innovation in manufacturing, defence, healthcare, and energy. It is equally essential to some of today's most advanced technologies in artificial intelligence, robotics, quantum, and semiconductor chips – all of which rely on photonics at their core.
2. **Launch a new class of Photonics Grand Challenge Proposals** that will give Europe a competitive edge in geopolitically sensitive domains such as AI, space, manufacturing, health, agrifood, quantum, and defence.
3. **Strengthen the resilience and sustainability of Europe's strategic photonic supply chains.** The European photonics industry is facing serious supply chain issues that are the direct result of overdependence on overseas markets. Labelled as a strategic technology sector for the EU<sup>5</sup>, photonics must be bolstered by tailored, fact-based, and proportionate policy measures. We must implement a European photonics strategy on critical materials, components and production. Only this can ensure resilient supply chains for the many industries where photonic technology is key.


We stand ready to engage with the EU institutions in shaping Framework Programme 10. We are fully convinced that Europe holds far greater potential in the global innovation race. To maintain its position as a model of economic and social prosperity, Europe must make bold and sustained investments in critical technological domains such as photonics. By committing to this vision, Europe will pave the way for a prosperous and sustainable future, ensuring that it remains at the forefront of global photonics innovation.

---

<sup>5</sup> European Commission. 2023. "Horizon Europe strategic plan 2025-2027 analysis." <<https://data.europa.eu/doi/10.2777/637816>> (24.10.2024).



## Defence & Security



Aki Korhonen  
President  
Senop Oy



Dr. Hans Dieter Tholl  
Head of Development, Centre of  
Competence for Electro-Optics and  
Electro-Mechanics  
Diehl Defence GmbH & Co. KG



Marek Adamiak  
President of the Board  
PCO S.A.



Piotr Wojciechowski  
President & CEO  
WB Electronics S.A.





## Automotive & Commercial Vehicles



Swen Malkus  
Senior Manager, Automation Engineering  
Mercedes-Benz AG

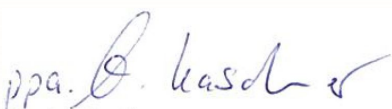


Dr. Sarah Uttendorf  
Director, Future Research  
Volkswagen AG

**VOLKSWAGEN GROUP**



Dr. Christofer Silfvenius  
Test Leader, Environmental Testing  
Scania Technical Center



Dr. Axel Kaschner  
Senior Vice President, Corporate Sector  
Research and Advance Engineering  
Advanced Technologies (CR/AT)  
Robert Bosch GmbH



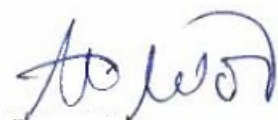
## Communications & Research



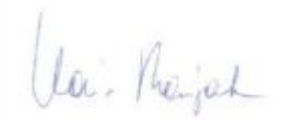
Peter Vetter  
President, Bell Labs Core  
Research Nokia



## Lighting & Sensing



Dr. Hans Nikol  
Vice President, Head of Open Innovation  
Signify BV

Dr. Karin Ronijak  
Vice President R&D, Global Public Funding  
ams-OSRAM AG




Dr. Walter Reithofer  
Senior Vice President, Global Research  
& Development  
SICK AG

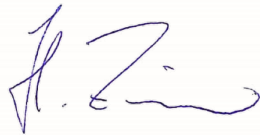




## Industrial Manufacturing



Dr. Lutz Aschke  
President, Photonics21



Dr. Hagen Zimer  
Member of the Managing Board  
CEO, Laser Technology  
TRUMPF SE + Co. KG



## Healthcare & Lifestyle



Richard Bosmans  
Director, R&D Partnerships and  
Funding Global Lens Innovation  
EssilorLuxottica



Dr. Matthias Müller  
Executive Vice President, Corporate  
R&D and New Ventures  
SCHOTT AG



Dr. Bernhard Ohnesorge  
Member of the Management Board  
ZEISS Photonics & Optics

