

#next_photonics.forum

First Photonics PPP Impact Report – Towards a Post Horizon 2020 Framework Programme

- *Giorgio Anania, Photonics21 Vice-President & CEO Aledia*
- *Philippe Vannson, Head of Photonics Unit, DG Connect, European Commission*



Photonics PPP – more than three Years of common Efforts to realize the Potential of Photonics for Growth & Jobs in Europe



Source: Photonics21/VDI Technologiezentrum GmbH, Photographer: Bea Uhart

Towards Horizon 2020 - Foundation of the Photonics PPP in 2013

Photonics21 Vice Presidents Bernd Schulte and Giorgio Anania and EU Commission Vice President Neelie Kroes (from left to right) officially signed the Photonics PPP contract in the frame of a Signing Ceremony for the eight contractual PPP's under Horizon 2020 in Brussels 2013



Source: Photonics21/VDI Technologiezentrum GmbH, Photographer: Vivian Hertz

Towards New Horizons – Photonics for Digitization of European Industry

Commissioner Günther H. Oettinger opened the plenary session of the Annual Meeting 2016 with his keynote speech "Photonics for the successful digitization of European Industry"

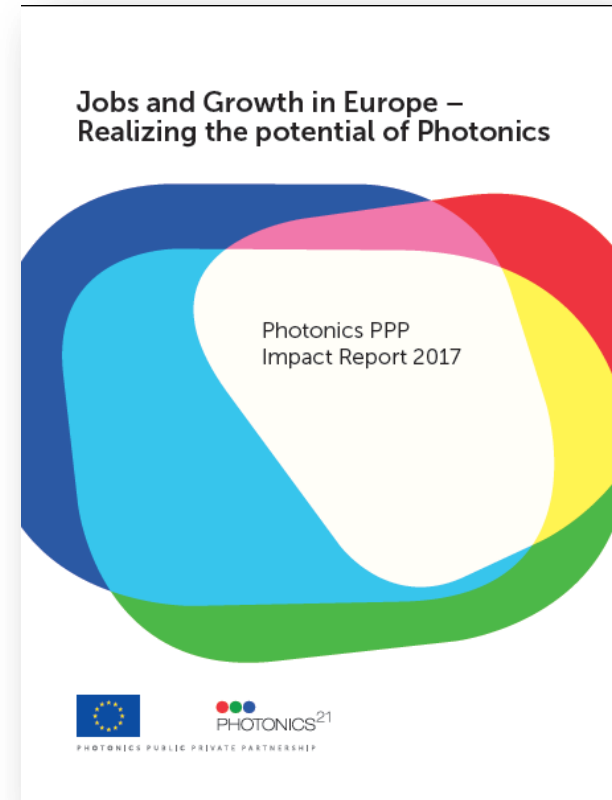


Photonics PPP Impact Report

Online Report – Read about how the PPP realized the Potential of Photonics for Growth & Jobs in Europe

The Photonics PPP Impact Report 2017 gives insights on

- More than 3 years close cooperation of the public and private side in the Photonics PPP
- PPP Performance as defined in our Key Performance Indicators (KPIs)
- Collaborations and Partners
- Future Challenges and how we will get prepared
- Can be viewed as Online edition under <http://www.photonics21.org>



Horizon 2020 Projects: > 270 Mio. Euro Funding / 654 Project Participants / mainly from Industry / > 50 % of them are SMEs

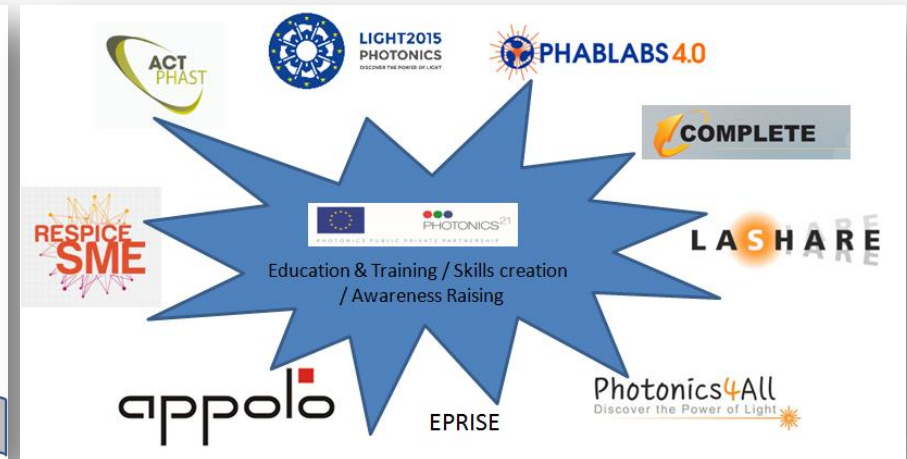
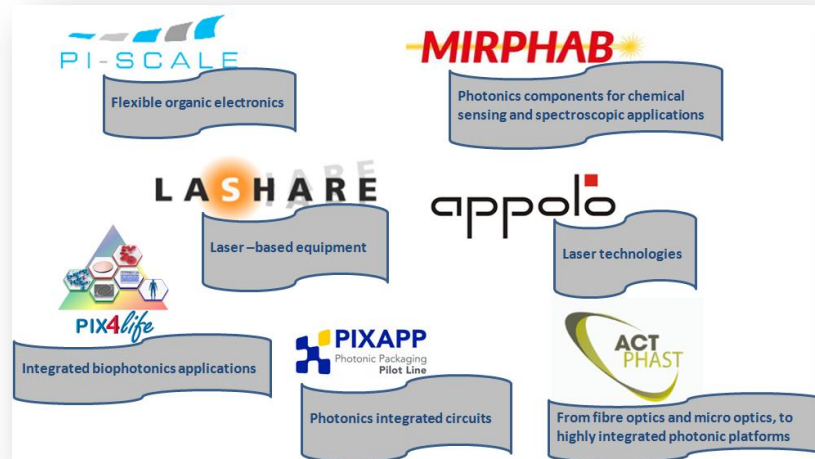
Horizon 2020 Projects – Key Figures

Subject	2014	2015	2016	3 years period
Total Funding for Projects (in €)	87,861,568.12	95,306,838.23	94,800,954.01	277,969,360.36
Number of Participants in Projects	215	209	230	654
Industrial Participation (# of Companies)	111	106	118	335
% of total participants	51.60%	50.70%	51.30%	51.20%
of which are SME's (# of SMEs)	62	58	67	187
SME % of Industry participants	55.90%	54.70%	56.80%	55.80%
SME % of total participants	28.80%	27.80%	29.10%	28.60%
Budget for Industry (in €)	45,846,170.94	33,306,845.17	45,219,997.46	124,373,013.57
% of total funding	52.20%	34.90%	47.70%	44.70%

Source: European Commission, DG CONNECT



Collaboration and Platform Activities: Pilot Line Activities and other CSA Projects supporting Jobs and Growth



Bridging the Gap between Lab and Fab:

4 PPP Pilot Lines and 3 PPP Prototyping Services help End-User Industry to speed up

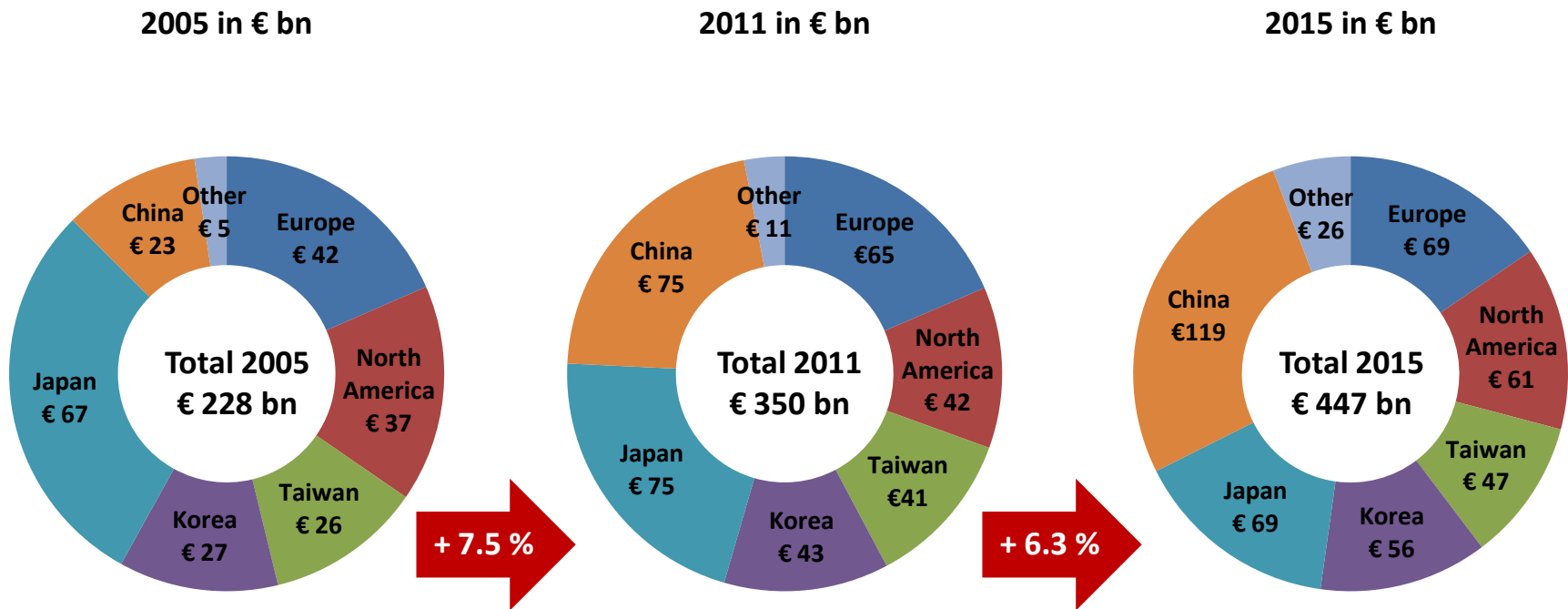
Promoting Education, Training & Skills

9 PPP Projects mainly contribute to promote Education, Training & Skills in Photonics & raise awareness about the potential of Photonics

Market Data of Global Photonics Industry

Solid growth above global GDP: Photonics Industry grew from a € 228 bn Industry in 2005 to a € 447 bn Industry in 2015

Production Volume on Euro Basis*

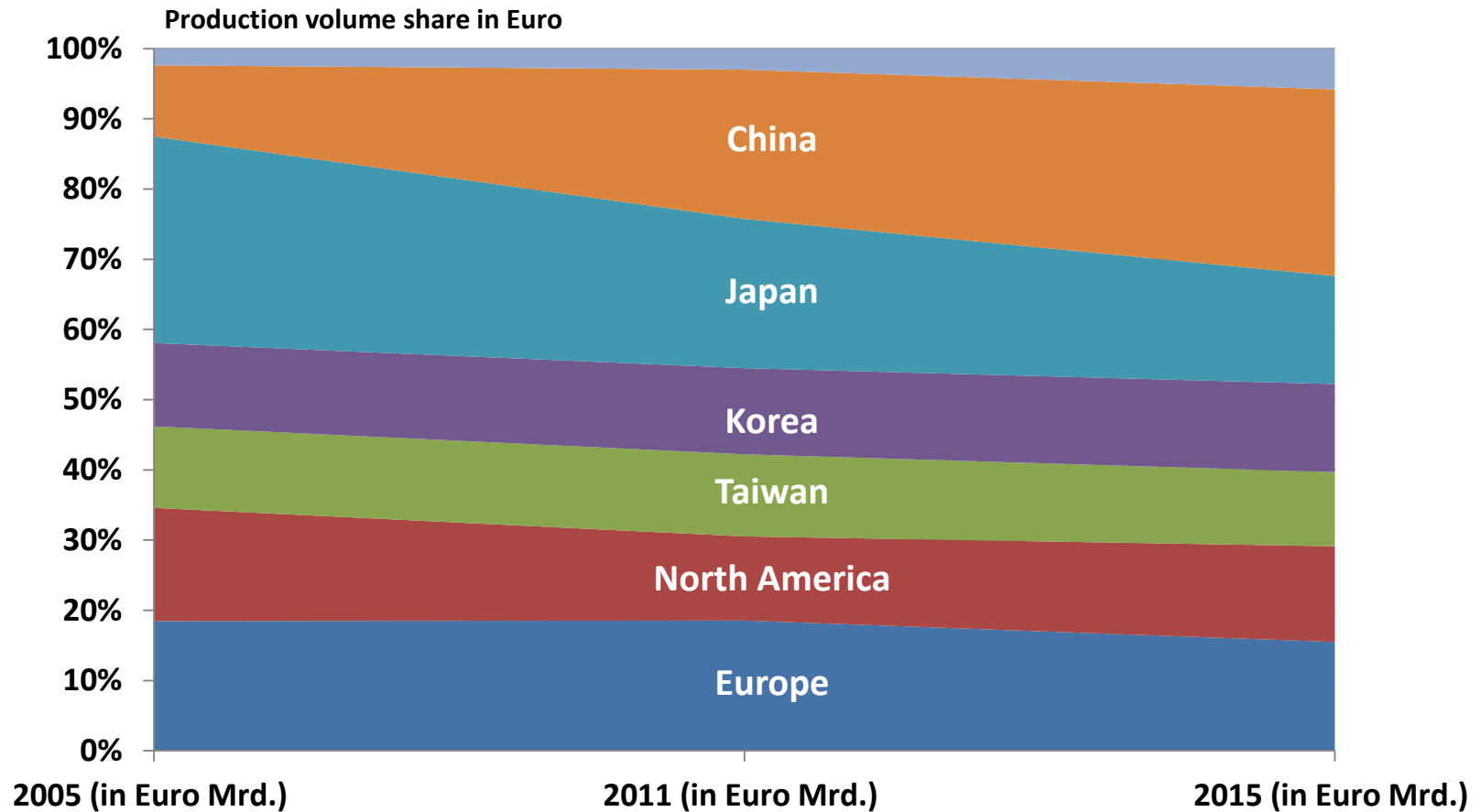


* with Photovoltaics which is not subject of the PPP

Source: Optech Consulting Market Research Study 24.1.2017

Market Data of Global Photonics Industry

Global Share Shift: China became the # 1 producer – Europe now on # 2 Position – former Champion Japan dropped to #3

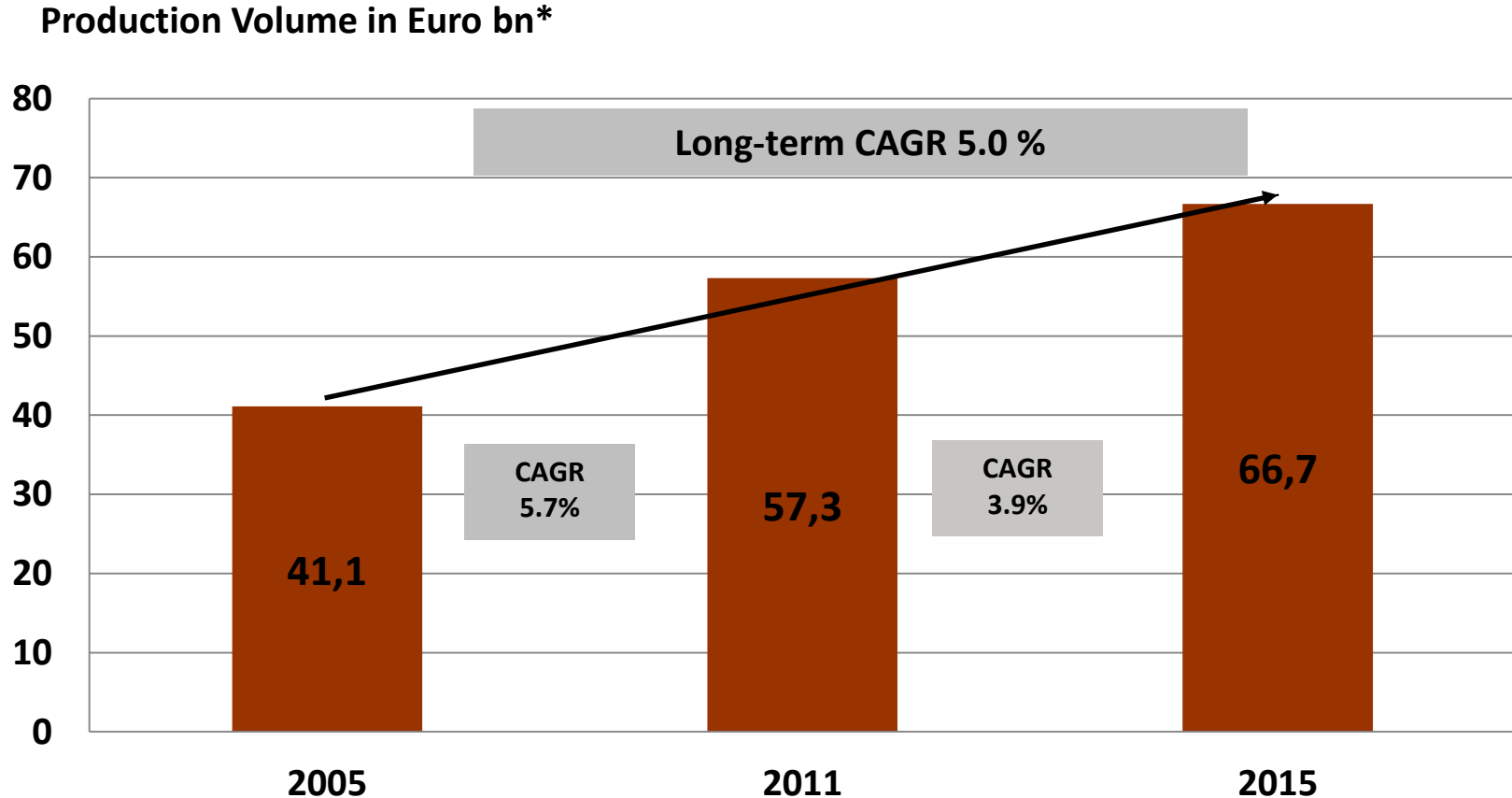


* with Photovoltaics which is not subject of the PPP

Source: Optech Consulting Market Research Study 24.1.2017 and Branchenreport Photonik 2013

Market Data of European Photonics Industry

Growth: European Photonics Industry demonstrated a solid long-term Growth Rate of 5 % from 2005 - 2015

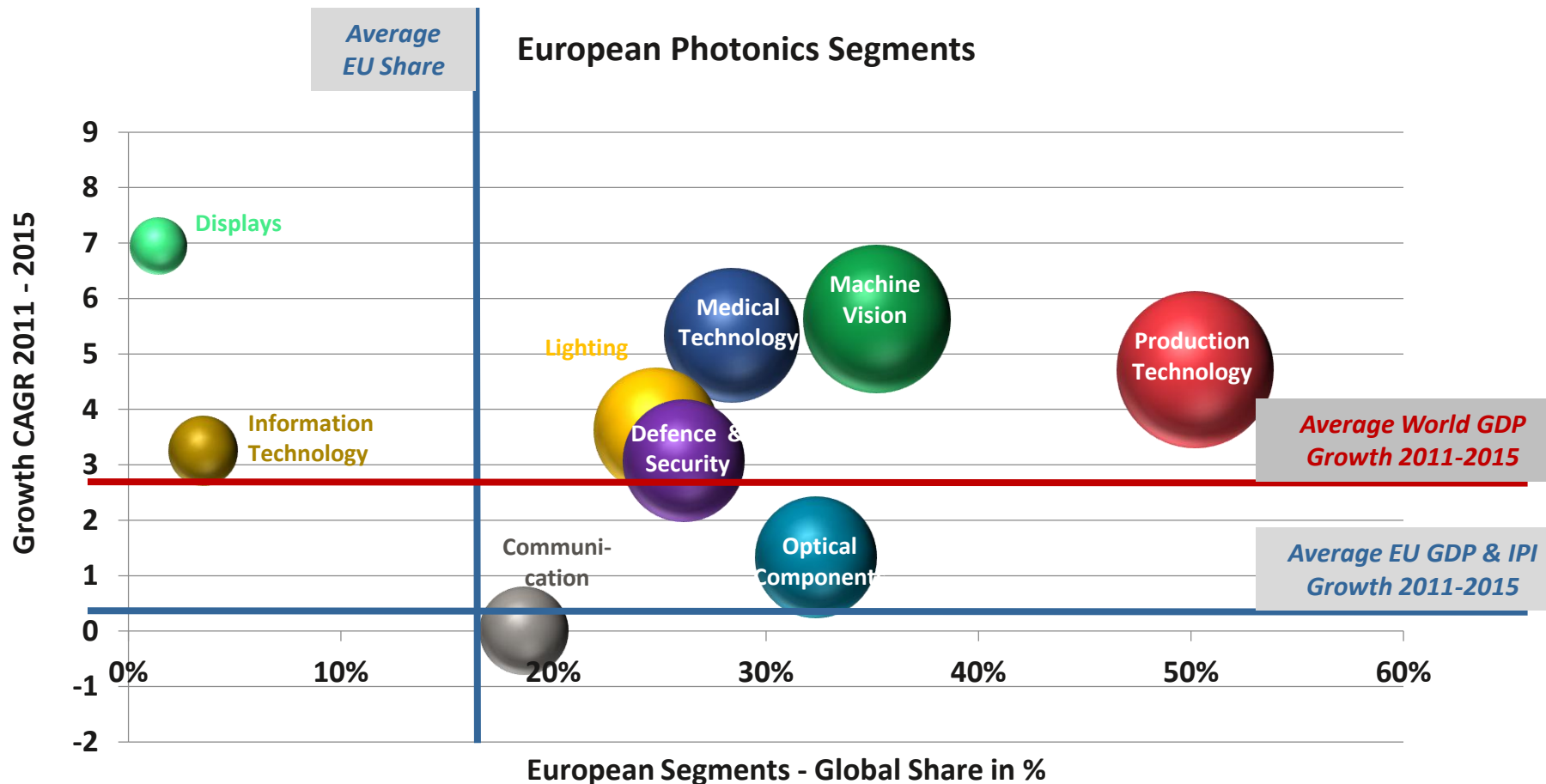


* without PV which is not subject of the PPP

Source: Optech Consulting Market Research Study 24.1.2017

Market Data of European Photonics Industry

The Segments View: Most European Segments were able to outgrow Global and European GDP Levels

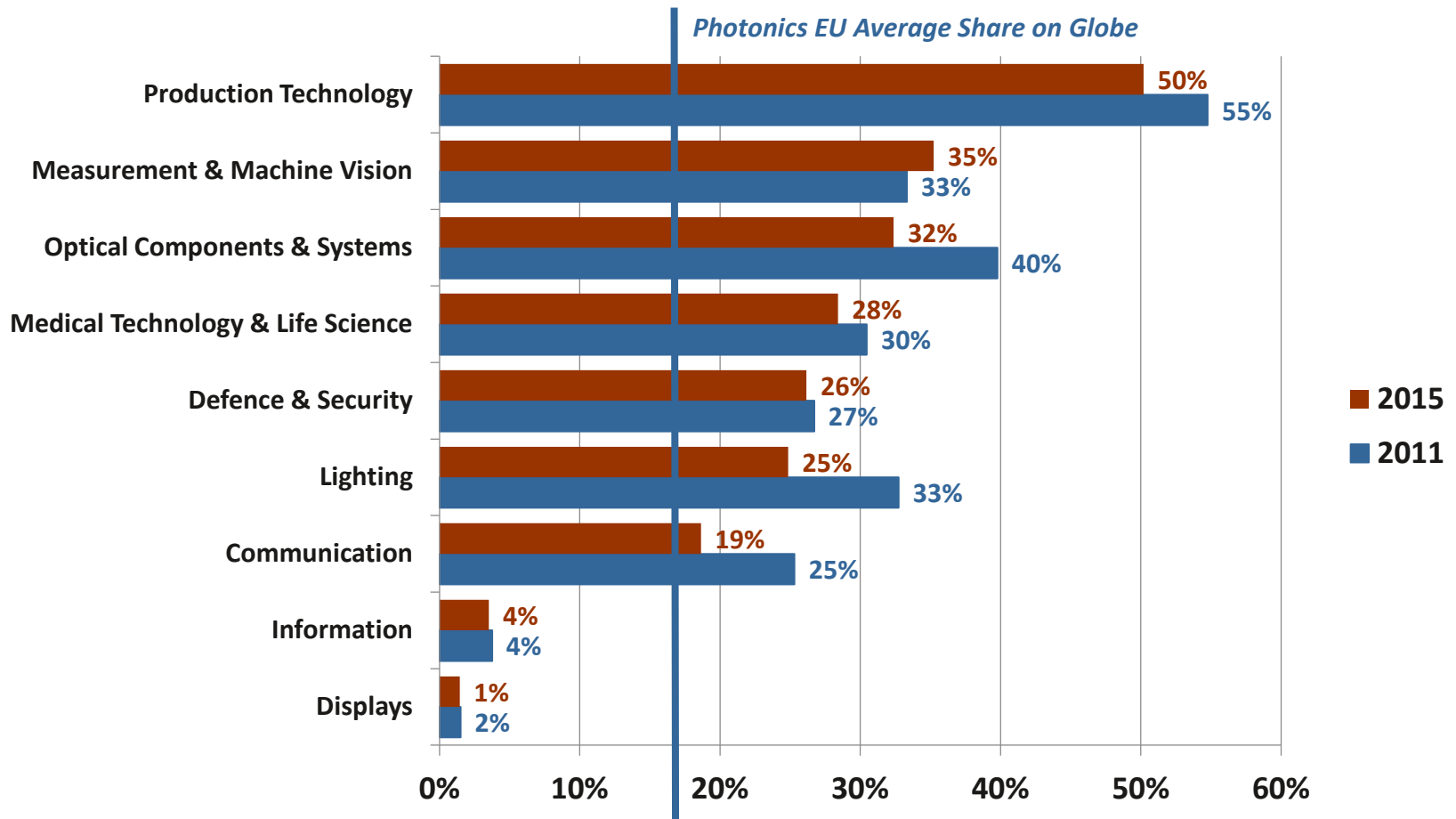


Source: Optech Consulting Market Research Study 24.1.2017



Market Data of European Photonics Industry

Leadership Position: Europeans Core Competence Segments remained strong and defended a Leading Global Position

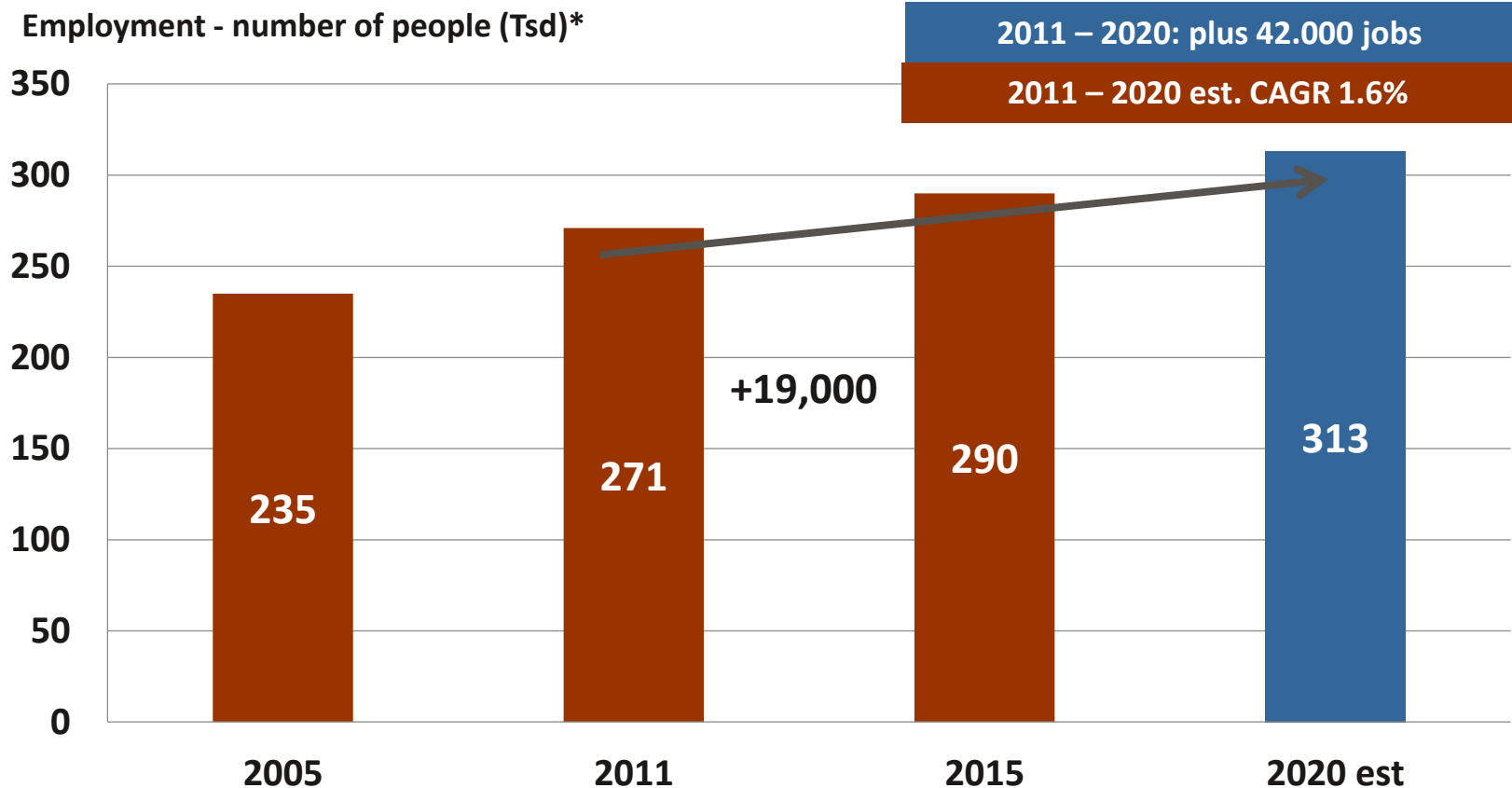


Source: Optech Consulting Market Research Study 24.1.2017



Market Data of European Photonics Industry

Employment: 42.000 more Jobs by end of Horizon 2020 expected – long-term Growth Rate of 1.6 % in 2011 - 2020



*without effects from Photovoltaics which is not subject of the PPP

Source: Optech Consulting Market Research Study 24.1.2017



Summary: Photonics PPP successfully driving Growth and Jobs in Europe by realizing the Potential of Photonics

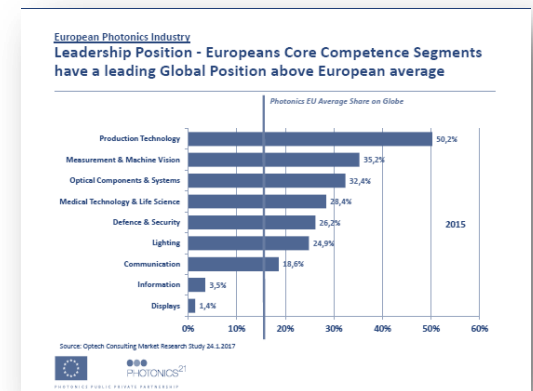
Photonics PPP in Horizon 2020 - more than 3 years of Public Private Collaboration

- Open & Transparent Platform
- > 3000 experts from industry & science
- Strong Industry & SME Participation
- 654 project participants
- More than > 270,000 Euro public funding
- 4 Pilot Lines speeding up the way from Lab to Fab



Market Data of European Photonics Industry

- Growth above GDP
- Leading position in Core Segments
- Europe has # 2 market share position
- Expected job growth of 42,000 by end of Horizon 2020
- Highly innovative with R&D spend of > 10 %



Thank You for Your Attention

