



European Photonics Industry Consortium

ANNUAL REPORT

2004



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OSRAM
Opto Semiconductors

RIXTRON

C|D|T

SAGEM

PHILIPS

EPIC Board Members

Foreword

Dear EPIC members,

I am glad to have the opportunity to thank you for your contribution to EPIC in the year 2004. This has been the first full year of EPIC's operations and, as I believe, it was a very successful year in executing our mission to promote sustainable growth for the Photonics Industry in Europe.

I believe that easily the most important achievement in our inaugural year is the fact that today, EPIC already represents 55 members and that we are financially sustainable thanks to your contributions. These are important milestones in our aim to represent the Photonics Industry in Europe.

The first workshop organized by EPIC – "Photonics in the Automobile" – held in Geneva at the end of 2004, was very well attended, positively received and led into an impressive roadmap and analysis document which is available to all members. We are very much looking forward to a similar success with the next workshop, in Cambridge, UK, on Organic LEDs and further workshops are planned. It is important to mention that these workshops are targeted to produce substantial reports, roadmaps, and analysis which can be used to support your own business strategies afterwards. We aim to make this practical workshop output the major difference compared with other workshops and conferences offered, and the first report on Photonics in the Automobile demonstrates this clearly.

Furthermore, I was very impressed with the professionalism and speed at which the EPIC teams, in close cooperation with the VDI, completed a positioning paper to the European Commission on "Photonics in the 21st Century". When this task was started in early November last year I was doubtful that it was possible to complete it by Christmas 2004. Not only was it achieved on time, it was done in a manner which convinced the EU officers to recommend a technology platform for Photonics for the FP7 framework. Many thanks again to the VDI and the EPIC team! Unquestionably, there is still a long way to go to convince the European parliament on the importance and opportunities of Photonics for Europe, but we have made an excellent start.

Once more, I would like to thank all of the EPIC members for their contribution and also would like to use the opportunity to thank all of the board members of EPIC and their companies for their work and support throughout the last year. Finally I would like to express my specific thanks to Tom Pearsall, our General Secretary, for his personal commitment and effort to make EPIC an integral part of the European Photonics Industry.

Bernd Schulte



Dr. Bernd Schulte, President

Overview

Promoting Sustainable Growth for the European Photonics Industry

EPIC is working to create opportunities: growing business and new technologies for European photonics industries. Starting from our base of five Board members in January of 2004, more than 50 companies decided to join the EPIC team. EPIC is now recognised throughout Europe as one of the driving forces supporting the creation of a photonics technology platform at the European level.

What we accomplished in 2004

Building the Consortium

The past year, 2004, focussed on building an organisation that could deliver value to its members and credibility before the European Commission. This has involved building the right legal structure, recruiting a strong membership, and making sure that our expenditures are balanced by revenues. The support and participation of our members has made all the difference.

Delivering a programme to our members

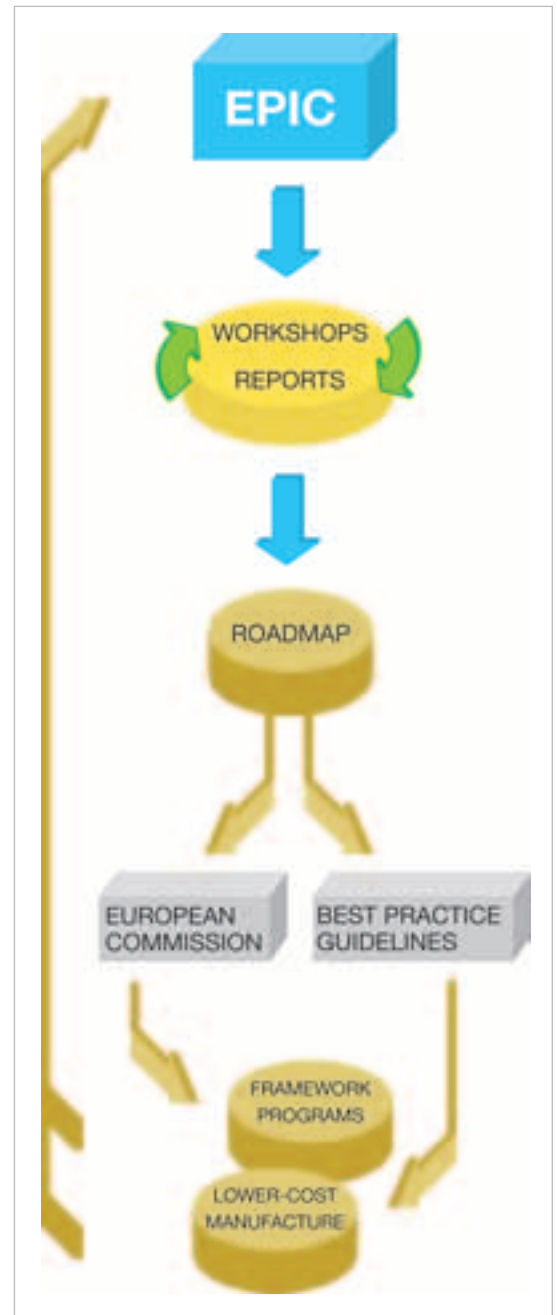
Our workshops and symposia addressed: photonics in the automobile, new opportunities for optical communications components in the era after the telecommunications downturn, and photonics in the FP-6 R&D programmes. These programmes have generated the first substantial input to the photonics technology roadmap.

Interfacing with the European Commission

All in all, EPIC participated, on behalf of its members, in nine different actions. Among the most important, EPIC helped to organise two important meetings with the European Commission – IST to structure the 5th call of FP-6 and to initiate a photonics technology platform in FP-7. These two meetings gave attending EPIC members the chance to have direct input to the European Commission.

Building new resources

In the autumn of 2004, EPIC participated successfully in two calls for proposals from the European Commission. As a result EPIC will continue to play a pivotal role in the design of FP-7, and is also involved in the integration of nanotechnologies and photonics within the EC. These programmes will bring additional income of about 80 000 euros per year to EPIC, allowing us to bring more benefits to our members without any increase in membership fees.



The EPIC cycle generates information and value for members.

Overview

A look forward to 2005

A warm welcome to our new members

EPIC continues to recruit new members. Since January, the following organisations have joined EPIC:

ALSI (Netherlands)	Henk van der Heide
Laser Separation & Dicing	



ASML Special Applications (Netherlands)	Paul van Dijk
Advanced Optical Lithography	



Centre for Nanophotonics - FOM (Netherlands)	Albert Polman
Nanophotonic Technologies	



The Heinrich Hertz Institute (Germany)	Godehard Walf
Technologies for Communications Components	



The Mario Boella Institute and the Polytechnic of Torino (Italy)	Silvio Abrate
Education and Research	



Olivetti I-Jet (Italy)	Livio Cognolato
Optical Interconnect Technology	



This year we are planning three workshops

- * OLEDS: Building a European Infrastructure
6-7 June, Cambridge, UK
- * Broadband Access: What Place for Photonics?
25 September, ECOC'2005 Glasgow, UK
- * Laser Applications in Europe
23-24 November, Dresden, Germany

In June EPIC will send a questionnaire to all Members in order to solicit their choice for workshop topics for 2006.

Overview

A European R&D research area focussed on photonics

Our major initiative in 2004 has been to bring together European industry to create the Photonics Technology Platform. In March EPIC and the VDI published "Photonics for the 21st Century". This vision statement has been signed by over 60 organisations that are working on photonics in Europe. If your organisation would like to sign, please let us know, as there is still time. The vision statement is the basis for bringing together the photonics research activities in 3 DGs: DG Enterprise (primarily photonics for security), the DG research (nanotechnologies and fundamental research) and DG IST (photonics applications in communications, displays, lighting). The objective is to recognise photonics as a strategic technology, and to organise R&D funding through a technology platform that unities basic research development and applications. We urge all members to read and defend this document, and to spread the news to all in the photonics community.

There are significant challenges that we must meet to reach this objective. EPIC is organising meetings with European Commissioners who have responsibility for the EC R&D programmes to explain why the objective is of critical importance to Europe, and to ask for support to realise our objective by a concrete presence in FP-7.

A Partner in European Programmes

EPIC will be working in the OPERA - 2015 coordination action to promote the vision in Photonics for the 21st Century and to implement the Photonics Technology Platform in FP-7. We will be organising symposia across Europe to solicit input and to present ideas for major themes in FP-7.

EPIC will be working in MONA to integrate R&D programmes in nanotechnologies and photonics. Photonics is a key technology for implementing nanotechnology research. In FP-6 these subjects are treated in two separate DGs. In FP-7 they will be coordinated and hopefully integrated in the photonics technology platform.

EPIC is exploring a possible proposal for the 5th call of FP-6 to implement the ACCORD initiative. ACCORD (Advanced Components Cooperative for Optoelectronics Research and Development) is a programme to put prototype components into the hands of university students. The objectives are to train students on the next generation of photonics components and systems, and to expand focussed R&D capability for companies producing these prototypes.



Thomas P. Pearsall
General-Secretary



Actions 2004

Conferences, Workshops, Symposia

Creating Opportunities for Photonics in Europe

T.P. Pearsall, EPIC, Paris, France and Peter Van Daele, INTEC, University of Ghent, Ghent, Belgium



SPIE Photonics Europe, 27 April, 2004, Strasbourg, France

Photonics and FP-6: the Viewpoint of European Companies

T.P. Pearsall, EPIC, Paris, France

EPIC – OPTIMIST Workshop, June, Athens, Greece



Roadmapping a Durable Photonics Industry in Europe

T.P. Pearsall, EPIC, Paris, France

EPIC Symposium on New Opportunities in Photonics
ECOC 2004, 9 September 2004, Stockholm, Sweden



Roadmapping a Durable Photonics Industry in Europe

T.P. Pearsall, EPIC, Paris, France

International Open House - Fraunhofer Institute Material and Beam Technology 20-21 September 2004, Dresden, Germany



Building a Durable Photonics Industry

T.P. Pearsall, EPIC, Paris, France

LEDs 2004, 20 October 2004, San Diego, CA, USA



Photonics in the Automobile

T.P. Pearsall, EPIC, Paris, France

EPIC Workshop on Photonics in the Automobile
30 November – 2 December 2004, Geneva, Switzerland



Actions 2004

Publications, Press

EPIC OPTIMIST Photonic Components Workshop	Athens, 2 June 2004	CD-ROM
EPIC ECOC 2004 Symposium on New Opportunities for Photonics in Europe	Stockholm, 6 September 2004	CD-ROM
EPIC Photonics in the Automobile	Geneva, 29 Nov – 1 Dec 2004	CD-ROM

Following the creation of EPIC in December 2003, many articles have been published in the photonics and business press:

- ★ 5 European Companies Form EPIC Photonics Consortium, *CompoundSemi News*, Jan. 5, 2004
- ★ Consortium set up by European photonics industry leaders (Colin Holland), *EE Times UK*, Jan. 2, 2004
- ★ EPIC photonics consortium, *European Semiconductor*, Jan. 5, 2004
- ★ European Photonics Industry gets EPIC Boost, *Laser Focus World*, January 2004
- ★ In late December, five European companies founded the European Photonics Industry Consortium (EPIC), *Lightwave*, Jan. 5, 2004
- ★ Five European Companies have set up a European Photonics Industry Consortium (EPIC), *Micronews N°22*, February 2004
- ★ Photonics boost (Vanessa Knivett), *New Electronics*, Jan. 13, 2004
- ★ L'Union Européenne au chevet de l'optique (Hassan Meddah), *L'Usine Nouvelle N°2899*, Jan. 8, 2004
- ★ Epic maps Europe's optics future (T. Pearsall), *OLE*, March 2004
- ★ Photonics in Europe (Kim Douglass), *Optics and Photonics News*, February 2004
- ★ Les industriels européens de la photonique se rassemblent, *Photoniques N° 13*, March 2004
- ★ Creation of European Photonics Industry Consortium, *SID - Information Display On Line*, January 2004



Actions 2004

The Web Site

EPIC's web site – www.epic-assoc.com – has been developed to provide necessary information to the reader, with a simple and easy to access structure. The aim is to describe the Association's organisation and purpose and provide information on recent and future activities.

The site contains a calendar of forthcoming events with links to organisation's web sites, a list of members and an interactive membership application form.

The Member's Corner contains comprehensive reports and publications, complete membership directory as well as press articles, Meetings minutes and Technology Group sections' information.

The site received over 3 000 visitors in 2004 and generated more than 150 inquiries for Information packages as well as Membership application packages.

The EPIC Newsletter

The EPIC Newsletter provides current information to Members concerning recent events and future opportunities.

It contains an Editorial written by one of the EPIC's members, sector news in terms of technologies, marketing or events, information regarding EPIC, reports of conferences, workshops, EU programmes and information concerning forthcoming events.

The EPIC Newsletter was first published in July 2004 and appears once per quarter. It is distributed to Members and interested parties. The current issue is always available on the EPIC site in the "downloads" section.

Members in 2004

Aixtron (DE)
Albis (CH)
Audi (DE)
Bookham (GB)
Cambridge Display Technology (GB)
CEA-LETI (FR)
Centre for Nanophotonics (NL)
Centre for Nanotechnology, Micro and Photonic Systems (GB)
Chalmers University of Technology (SE)
COM Research Center (DK)
Covion Organic Semiconductors (DE)
CrystalQ (NL)
DA-Lightcom (FR)
Dow-Corning (BE)
Edmund Industrie Optik (DE)
Esko Graphics (DE)
Fraunhofer Institute for Applied Optics and Engineering (DE)
Fraunhofer Institute for Laser Technology (DE)
Fraunhofer Institute for Material and Beam Technology (DE)
Fraunhofer Institute for Reliability and Microintegration (DE)
German Aerospace Center (DE)
G.L.I. Global Light Industries (DE)
Haute Ecole ARC Ingénierie (CH)
INSA Lyon - LPM (FR)
INTEC Department of Information Technology (BE)
Institute of Photonics (GB)
IQE (GB)
Kista Photonics Research Center (SE)
Leybold Optics (DE)
Merge Optics (DE)
Modulight (FI)
NL Nanosemiconductor (DE)
Northlight Optronics (SE)
Optics Valley (FR)
Osram Opto Semiconductors (DE)
Perfos (FR)
Philips Automotive Lighting (NL)
PicoGiga International (FR)
Rohm and Haas Electronic Materials (FR)
SAES-Getters (IT)
Sagem (FR)
Saint Gobain Recherche (FR)
Spectra Physics (DE)
SÜSS Microtec (DE)
Technical University of Berlin – Solid-State Physics (DE)
Thales Research and Technology France (FR)
Time-Bandwidth Products (CH)
TriVeCo (DE)
u2t Photonics (DE)
Umicore (BE)
Vigo System (PL)
Wroclaw University of Technology (PL)

Thin-Film Deposition Equipment
Optical Communication Components
Automotive Lighting
Optical Communications Components
Optoelectronic Polymer Technology
Microphotonics Technology Development
Nanophotonic Technologies
Microphotonics and Biophotonics
Education and Research
Optoelectronics Technology Development
OLED and Polymer Materials
Epitaxial Substrates for Nitride Growth
RF and Microwave Photonics
Photonics Materials & Custom Services
Passive Optical Components
Graphics Reproduction and Display
Precision Optical Coatings
Laser Sources and Applications
Laser Materials and Surface Processing
Polymer Photonics
Project Funding and Management
Solid-State Lighting Modules
Education and Research
Education and Research
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Education and Research
Epitaxial Thin Film Fabrication
Microphotonics Technologies
Thin-Film Deposition Equipment
Compact Photonic Modules
Optical Communications Components
Quantum-dot Lasers
Optical Communications Components
Photonics Industry Development
Solid-State Lighting
Specialty Optical Fiber Technologies
Solid-State Lighting
Solid-State Lighting
Specialty Optical Materials
Photonics Components and Materials
Defence, Space and Aeronautics
Specialty Optical Materials
Laser Sources and Applications
Component Fabrication and Packaging
Education and Research
Defence, Space and Aeronautics
Laser Sources and Applications
Consulting in Photonics
Optical Communications Components
Semiconductor Substrates
Sensors
Education and Research

Summary financial statements

2004 (All figures are in euros)

ASSETS

Cash	17 877
Membership fees receivable	17 500
Total Assets	35 377

LIABILITIES

Accounts Payable	13 384
Social charges payable	6 981
Net Income	15 011
Total Liabilities	35 377

INCOME

Annual Membership Fees	155 000
Total Revenues	155 000

EXPENSES

Operational costs	63 565
Salaries and Consulting Fees	62 940
Social Charges	13 423
Bank Charges	59
Total Expenses	139 988

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