



EPIC ANNUAL REPORT 2005

Table of Contents

Mission: Promote Sustainable Growth for the European Photonics Industry

EPIC is owned and operated by its members: SMEs, R&D laboratories and universities, as well as larger companies. Benefits for EPIC's members are:

- European R&D projects that address their needs
- A cutting-edge information: EPIC members receive all reports free of charge
- Higher margins: roadmaps will be used to develop standards that create higher manufacturing margins
- A direct participation in a dialogue with the European Commission
- Members decide on each year's programme content
- Networking at a high level with leaders in photonics technologies and applications.

Table of Contents	P. 2
Foreword by B. Schulte, President EPIC	P. 3
Overview	P. 4-5
A word from the General Secretary	
A warm welcome to our new members	
Actions 2005	P. 6-7
Publications	
Conferences, Presentations	
Photonics Technology Platform	
European Coordination Projects	
Members	P. 9-10
Summary Balance Sheet	P. 11



Dear EPIC members,

It is my pleasure to write you once again after this, our second year, working as a European Organisation to promote the sustainable growth of the Photonics Industry. Didn't it turn out to be a great year?

Last year, I wrote that we had made an excellent start in our bid to bring Photonics to the front page of European development and investment.

From the initial positioning paper to the European Commission "Photonics for the 21st Century", we were able to go on to develop this program into a very real Technology Platform: Photonics²¹, which was accepted by the European Commission and formally founded in December 2005. For those of you who attended, I am sure that you will agree that the foundation ceremony was an impressive event by any standards, with more than 200 participants from the Photonics industry and research community in attendance. Today, we can boast that Photonics²¹ has over 380 members from 27 countries, 50% of whom come from industry.

This year, it is tempting to say that we are in the home stretch, but this is just the beginning. As we all know, this is when we must remain even more focused and run even faster! It is essential that we now make effective use of what we have achieved to date. I would like to especially thank all those EPIC members who were actively involved in the creating of the Strategic Research Agenda, and to urge all members to continue to contribute to the working groups of Photonics²¹ to work towards getting the EPIC objectives written into the 7th framework programme.

I cannot miss this opportunity to thank all EPIC members, my colleagues at the board and especially Tom Pearsall, for all their contributions and support throughout 2005.

Yours sincerely,

Dr. Bernd Schulte,
President



EPIC Board (from left to right): B. Stapp, Osram Semiconductors; J. Halls, Cambridge Display Technologies; K. Brunner, Philips Lighting; J.T. Audren, Sagem Défense & Sécurité; K. Streubel, Osram Semiconductors; sitting: B. Schulte, Aixtron.

A word from the General Secretary



2005 was a very good year for EPIC. We welcomed 16 new members during the year, with a good mix of large and small companies located across Europe. Working together, EPIC members were effective in presenting the compelling vision for the development of photonics technologies in Europe, and these actions resulted in the support of the European Commission for the creation of the Photonics Technology Platform: Photonics²¹. To reach this milestone, EPIC has learned to work in a collaborative mode with other much larger organisations, like the VDI, the European Optical Society, and the Department of Trade and Industry in the UK, without losing its identity. At the same time we have been successful at leveraging the agenda of EPIC's members through these collaborations. The creation of the Photonics²¹ platform represents a quantum leap for European photonics, opening the door to extraordinary possibilities. Now the work must begin to use the strength of the Photonics²¹ Platform to realise the benefits from these opportunities.

Seven EPIC members joined together to write a successful proposal for 1 million euros to implement the industry – university component exchange programme: ACCORD. I hope that this is the first of many successful joint programmes among EPIC members to advance the support of photonics technologies in Europe.

Finally, the financial condition of EPIC continues to be sound. The contribution to our resources from a few European projects has enabled EPIC to grow and to strengthen its influence in Europe, while keeping admission fees at their level in 2003.

In a word, EPIC achieved all its major objectives in 2005.

With the Photonics²¹ platform now in the operational phase, EPIC will work to coordinate platform actions that address the priorities of our members. In 2006, we propose to evolve our technology working groups to focus on these priorities.

The next European Framework Programme, FP-7, will start in January of 2007. EPIC will be working during this year to assure that the most important issues in photonics technologies will be covered in the first call for R&D proposals. In addition to technology issues, it is now time to develop a long-term plan for financial and operational support of the Photonics²¹ platform. While EPIC consortium may appear to be the most logical administrator of the technology platform, we need to develop the resources necessary for sustainable and effective operation of Photonics²¹. We will work with members, the European Commission, and our collaborators across Europe to develop this plan during 2006.

Thomas P. Pearsall,
General Secretary

Overview

A warm welcome
to our new members

EPIC continues to recruit new members. These European companies and research laboratories have joined EPIC during the last year:

Barco

President Kennedypark 35,
B-8500 Kortrijk, Belgium
Patrick Vandenberghe
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Laser Diagnostic Instruments

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TopGaN

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Publications

Reports

Five CD-Roms have been produced and distributed in 2005 gathering presentations, reports and pictures on following events:

- EPIC – Workshop on OLEDs: Building European Infrastructure
Cambridge, UK, 6 – 7 June 2005
- EPIC – Workshop on Universal Broadband Access
ECOC 2005, Glasgow, UK, 25 September 2005
- EPIC - Biophotonics Excellence Course
Torino, Italy, 6 June 2005
- EPIC – Workshop on Laser Applications in Europe
Dresden, Germany, 23-24 November 2005
- Launch of the Photonics Technology Platform
Brussels, Belgium, 1 - 2 December 2005



In February 2005, EPIC and the VDI jointly published “**Photonics for the 21st Century**”, the vision document that led to establishment of the Photonics Technology Platform.

A market report called “**Building European OLED Infrastructure**” was published and distributed to all EPIC Members in August, 2005. The report is now on sale from i-Suppli for 4 500 .

A market report called “**Photonics in the Automobile**” was published and distributed to all EPIC members in March 2005. The report is now on sale from Yole Développement for 2 450

Press

A number of articles have appeared in the professional press in 2005, among them:

- “Solid-state lighting in the automobile: concepts, market timing and performance” / LEDs Magazine in April 2005
- “Photonics report advises new direction for Europe” / Opto & Laser Europe, May 2005, Issue 128

Conferences Presentations

EPIC – Invited Presentation: Building European Infrastructure
in Photonics
4–6 April 2005
Royal Dublin Society, Dublin, Ireland



EPIC – Invited Presentation: Towards a Photonics
Technology Platform
24 May 2005
German Glass Association, Würzburg, Germany



International Coalition of Optoelectronics Industry Associations
22 - 23 September 2005
Edinburgh, UK



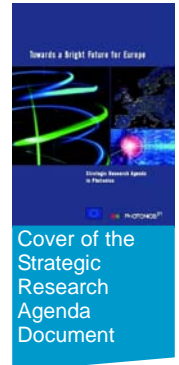
EPIC – Invited Presentation: Building the Photonics
Technology Platform
12 September 2005
Photonics North, Toronto, Canada





EPIC has been instrumental in the creation of the Photonics Technology Platform with the following objectives:

- Bring together all interested stakeholders to develop a long-term vision
- Members create a coherent, dynamic strategy to achieve that vision
- Members steer the implementation of an action plan to deliver agreed programmes of activities
- The **Strategic Research Agenda** forms a crucial part of the implementation strategy, to optimise the contribution of RTD to the process
- Generate sustainable competitiveness and world leadership for the EU
 - Stimulating increased and more effective investment in R&D
 - Accelerating innovation
 - Eliminating the barriers to the deployment and growth of new technologies.



In order to achieve these goals, EPIC successfully applied the following agenda in 2005:

- Strategic Vision Document: Photonics for the 21st Century published in February 2005
- Research Themes for FP-7: setting up the Platform along the lines of EPIC by participation in the meeting with European Commissioners Potocnik and Reding on May 19, 2005
- Numerous presentations to the photonics community across Europe to inform them of progress towards the formation of the Technology Platform
- Launch of the Photonics Technology Platform in Brussel on December 1-2, 2005
 - EPIC members are also members of the platform
 - EPIC members hold 7 out of 11 posts on the Executive Board
 - EPIC is the source of information about platform activities



Photronics²¹ Executive Board (from left to right, underlined names are EPIC members): P. Leibinger, Trumpf; L. Thylén, Kista; M. Kujawska, Warsaw Technical University; A. von Witzleben, Jenoptik; B. Schulte, Aixtron; J.F. Coutris, Sagem DS; G. Anania, Bookham; P. Lagasse, IMEC; P. Stormberg, Philips Lighting; C. Dainty, EOS.



OPERA-2015: Optics and Photonics in the European Research Area

www.opera2015.org

The main objective of OPERA is to provide a Platform for adequate interaction of European IST-research in Optics & Photonics and to develop and implement a joint strategy for research and industry with the title "OPERA 2015" to shape the future of this highly important industrial area.

Started April 2005



MONA: Merging Optics and Nanotechnologies

www.ist-mona.org

The MONA project will contribute to the coordination of photonics research with nanotechnology research. There are three principal objectives:

- Create a common site for the exchange of information concerning research, networks of excellence, and integrated projects in photonics and nanotechnologies.
- Promote the timely exchange of scientific results, market development, and technology needs through MONA-developed workshops.
- Develop a European roadmap for photonics and nanotechnologies.

Started June 2005

ACCORD: Advanced Components Cooperation for Optoelectronics Research and Development

- Objective: Put pre-commercial photonic components and systems in the hands of students and researchers
- Involvement of EPIC: Seven out of nine partners are EPIC members
- Status: Accepted for funding.

Starts September 2006

Members



Electron beam lithography system for patterning of nanostructures at Chalmers University of Technology



Optical engineer at work at Barco

Aixtron	Thin-Film Deposition Equipment
Albis Optoelectronics	Optical Communication Components
Alcatel Thales III-V Laboratory	Telecommunication & Defence
ALSI	Laser Separation and Dicing
ASML Special Applications	Advanced Optical Lithography
Audi	Automotive Lighting
Barco	Display Design & Manufacturing
Bookham Technology	Optical Communications Components
Cambridge Display Technology	Optoelectronic Polymer Technology
CEA-LETI	Microphotonics Technology Development
Cedova	Optoelectronic Device Fabrication
CEIT	Education and Research
Centre for Nanophotonics	Nanophotonic Technologies
Centre for Nanotechnology, Micro and Photonic Systems	Microphotonics and Biophotonics
Chalmers University of Technology	Education and Research
COM Research Center	Optoelectronics Technology Development
CrystalQ	Epitaxial Substrates for Nitride Growth
DA-Lightcom	RF and Microwave Photonics
Dow-Corning	Photonics Materials & Custom Services
Edmund Optics	Passive Optical Components
Esko Graphics	Graphics Reproduction and Display
France Télécom R&D	Telecommunications
Fraunhofer Institute for Applied Optics and Engineering Precision	Optical Coatings
Fraunhofer Institute for Laser Technology	Laser Sources and Applications
Fraunhofer Institute for Material and Beam Technology	Laser Materials and Surface Processing
Fraunhofer Institute for Reliability and Microintegration	Photonics Packaging
German Aerospace Center	Project Funding and Management
G.L.I. Global Light Industries	Solid-State Lighting Modules
Haute Ecole ARC Ingénierie	Education and Research
Heinrich Hertz Institute	Technologies for Communications

Members

ICFO – Institut de Ciències Fotoniques	Education and Research
INSA LYON - LPM	Education and Research
Institute of Photonics	Education and Research
INTEC Department of Information Technology	Education and Research
IQE	Epitaxial Thin Film Fabrication
Jenoptik Diode Lab	Optoelectronic Semiconduct. Components
Kista Photonics Research Center	Microphotonics Technologies
Laser Diagnostic Instruments	Lasers & Sensing
Mario Boella Institute / Politecnico di Torino	Education and Research
Merck OLED Materials	Photonic OLED and Polymer Materials
Merge Optics	Compact Photonic Modules
Microelectronics Institute of Barcelona (Imb-CNM, CSIC)	Education and Research
Modulight	Optical Communications Components
NL Nanosemiconductor	Quantum-dot Lasers
Northlight Optronics	Optical Communications Components
Olivetti I-jet	Optical Interconnect Technology
Opticsvalley	Photonics Industry Development
Osram Opto Semiconductors	Solid-State Lighting
Perfos	Specialty Optical Fiber Technologies
Philips Lighting	Solid-State Lighting
Picogiga International	Solid-State Lighting
Powerlase	Lasers Sources and Applications
ProLas	Laser Material Processing
Rohm and Haas	Specialty Optical Materials
SAES-Getters	Photonics Components and Materials
Sagem Défense Sécurité	Defence, Space and Aeronautics
Saint Gobain Crystals	Specialty Optical Materials
Spectra Physics	Laser Sources and Applications
SÜSS Microtec	Component Fabrication and Packaging
Technical University of Berlin	Education and Research
Time-Bandwidth Products	Laser Sources and Applications
TopGaN	Laser Diodes
Umicore	Semiconductor Substrates
u²t Photonics	Optical Communications Components
Vigo System	Sensors
Wrocław University of Technology	Education and Research

Summary Balance Sheet

All figures in Euros

ASSETS

	2004	2005
Cash	17 877	55 483
Membership fees receivable	17 500	30 114
Fixed Assets	—	504
Total Assets	35 377	86 101

LIABILITIES

	2004	2005
Accounts Payable	13 384	1 408
Social charges payable	6 981	35 217
Net income	15 011	40 226
Income received in advance	—	9 250
Total Liabilities	35 377	86 101

INCOME

	2004	2005
Annual Membership Fees	155 000	185 054
European Programmes participation	—	94 546
Total Revenues	155 000	279 600

EXPENSES

	2004	2005
Operations costs	63 565	120 453
Taxes	—	5 551
Salaries and Consulting Fees	62 940	94 399
Social Charges	13 423	33 681
Financial expenses	59	53
Provision for depreciation	—	247
Total Expenses	139 988	254 384

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