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# The Strategic Importance of the Photonics Sector for Spain

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11/12/2020

ESHORIZONTE 2020

Portal español del Programa Marco de Investigación e Innovación de la Unión Europea

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# What is the current situation?

- Photonic Technologies defined as a **Key Enabling Technology** during Horizon 2020. Was the impact of being a KET noticeable?
- Interannual **growth rate** of the Photonics sector estimated at **6.5%**.
- Photonics showed a clear **traction effect towards industry** in key sectors like Manufacturing, Health, Communications, Transport...
- Photonics highlighted as a **priority** by several Spanish regions in their **RIS3** agendas.
- At the same time, clearly **under-financed** at **national/regional level** by most of them. Particularly when compared to H2020 funding.

# Where in H2020?

- More than **32M€** received by Spanish participants during H2020 (average of **4.6M€ per year** invested in Spain) only in ICT-LEIT projects.
- Participation in 44 projects, 14 of them coordinated.
- Success rate above 23% for Spanish participants.
- Other significant amounts coming from application projects in Societal Challenges or ERA-Nets, ESCEL JU, and specific developments under the Quantum Technologies Flagship.

# Who in Spain?

- 58 different entities involved in funded projects (**52%** of them are **private companies**).
- **77%** of these private companies are **SMEs**.
- However, companies “only” receive **33,8% of the budget** corresponding to Spanish participants.
- **Widely distributed** around Spain, as 5 different regions have a share of budget above 10%.

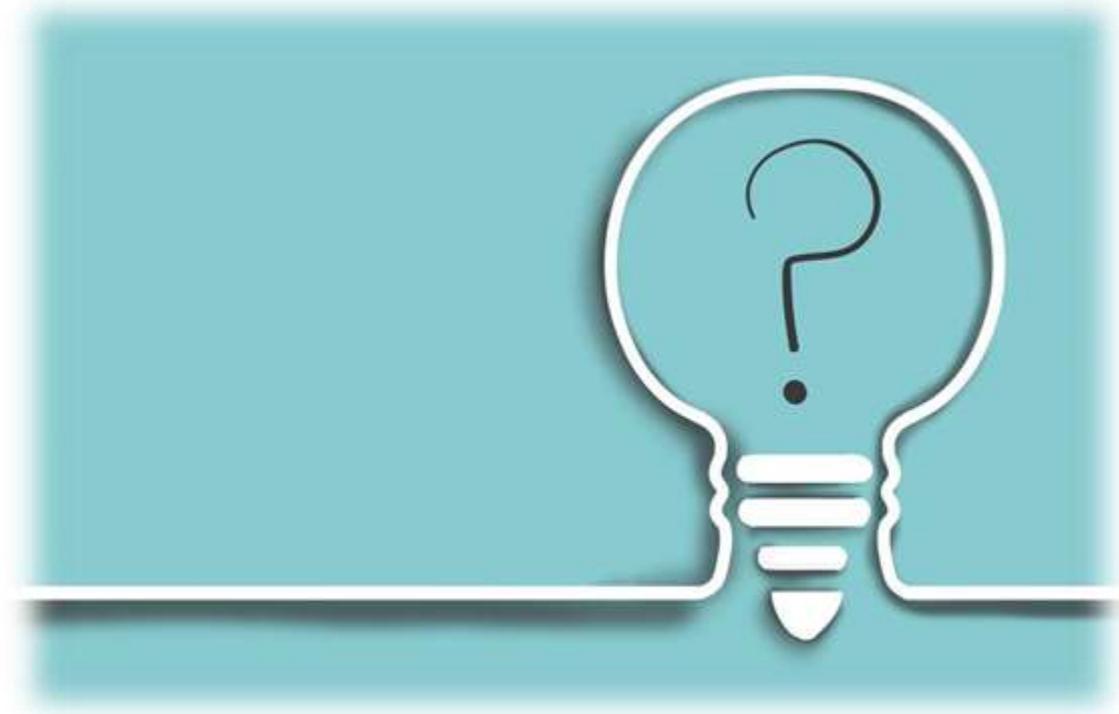
# What are the challenges?

- **Scientific actors** are clearly defined and positioned. Great!
- **Industrial actors** are traditionally smaller and widely distributed around the country.
- The importance of these **SMEs in the R&D context** also has the effect of a certain “under-representation” of the Industry in the budget distribution but, at the same time, shows a high potential for improvement, particularly when approaching application areas.
- The real challenge would be to **increase the traction effect** of these scientific developments towards the industry in application areas.

# Who can help?

- **Fotónica21**, for sure! It's the perfect playground for collaboration.
- **Public Administrations** at all levels: regional and national programs & involvement in european partnerships related to Photonics.
- **European Commission**: Pillar II -> Cluster 4 -> Destination 4 yes, but...
  - Where else we can find application opportunities?
  - Reinforce the concept of Photonics as a KET.
  - Make other areas of HE see the full potential of Photonics.

# Conclusions & Questions?





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