

Photonics Leadership Group

Meeting Minutes



Thursday 8 May 2025, 13:00-16:00,
CS Connected community Space, Newport and Virtually on Teams

www.photonicsuk.org

Attendees (39) in person and online, for whole or part:

Ric Allott, STFC; Yann Amouroux, Optica OSA; Simon Andrews, Fraunhofer UK; Karin Burger, SPIE Europe; Allan Colquhoun, Leonardo; Iwan Davies, IQE; Josh Davies, AMS Technologies; Helena Diez, Optica OSA; Chris Dorman, Coherent Scotland; Daniel Esser, Heriot-Watt University; Joe Ganniciffe, CS Applications Catapult; David Gillett, Laser 2000; Mark Goossens, CS Applications Catapult; Jon Heffernan, University of Sheffield; Lewis Hill, Future Photonics Leaders; Alan Hughes, Laser 2000; Hazel Hung, CS Connected; Steven Jones, Cadfem UK; Louise Jones, Photonics Connected; Steve Kidd, PowerPhotonic; John Lincoln, Harlin; Anke Lohmann, Anchored In ; Valerie Lyttle, Yelo; Iain Mauchline, InnovateUK; Owen McGann, GTS; Alastair McInroy, Technology Scotland; Wyn Meredith, Compound Semiconductor Centre; Ian Murgatroyd, Oxford Fiber; John Parsons , Indigo Consulting; Andy Robertson, Bay Photonics; Howard Rupprecht, CS Connected; Stephanie Russin, EPSRC; Philip Sibson, Thales UK; Malcolm Varnham, Trumpf UK; Matthew Wasley , KTN; Tom Watson, Cambridge Consultants; Tom Watson, Cambridge Consultants; Philip White, Department for Business & Trade; Ben Wood, Thorlabs

Direct Apologies:

Ian Alderton, Alrad; Richard Clark, AMS Technologies; Sara Diegoli, Anchored In ; Tom Harvey, CPI; Antony Hurden, Grounded Innovation; Shahida Imani, Singular Photonics; Mark Johnson, AFE; Kevin Mackrodt, Novanta; Keziah Morley, Department for Business & Trade; Chris Sorsby, Vitritech

**Post meeting and editorial input in italics*

1) Previous Minutes and welcomes

Those attending their first PLG meeting or attending on behalf of a new organisation were formally welcomed, including Stephanie Russin, EPSRC.

Minutes from previous meeting on 13 Feb 2025 were accepted without revision. These, along with all previous minutes are available at <https://photonicsuk.org/contributors/minutes/> with access code "PLGcontribute" (case sensitive).

2) Introduction to CS connected

Howard Rupprecht presented an [overview of CS connected](#), and the South Wales cluster and how it has matured over the last 10 years.

3) Industry strategy update

The industry strategy and spending review are currently being finalised by the Government – initial announcements expected during London Tech Week 9-13 June. First year 2025-26 settlement is very much expected to be a rolling over of previous spending, i.e if funded previously, will be funded at a similar rate in 2025-26. Any significant new programs will follow from April 26. It is understood that both quantum and semicon have secured reasonable funding including in the first year.

Downside of the 1+3 spending review is that any funding programs for 2025-26 will need to be launched and spent in 25-26 i.e. in < 9 months. This will constrain much activity to feasibility scale programs or extensions of previous programs.

Announcement of the UK National Semiconductor Centre is expected imminently. The high probability (although nothing confirmed until announced) is that this will be based at the Compound Semiconductor Centre in Newport in order to facilitate rapid stand-up of operations. Road-mapping in each of the four key focus areas of the centre will be a major focus for the first year, including in photonics. The PLG will fully support such activity

Discussion noted the importance of clarifying the boundary conditions and definition of what is sought from any photonics roadmap at an early stage. Leverage of telecom roadmaps and those currently being updated by Photonics21 highly recommended.

Action> PLG to liaise with DSIT on roadmap definitions

Sir Patrick Valance, Minister for Science Research and Innovation, opened new e-beam facility at Southampton Uni on 29/4. He was well briefed in advance on Photonics, emphasising its importance in remarks.

Overall Photonics appears to be gaining visibility and attention within DSIT, DBT and other gov departments, not just within Semicon but also more broadly. We can expect additional focus going forward, although with constrained budgets, significant funding should not be expected

4) Impact of global tariffs and trade barriers

ound table inputs were sought on the direct and indirect impact of tariffs on organisations.

Whilst direct tariffs are not seen as having a significant impact, associated trade restrictions are impacting supply chains. International border agencies appear to take strict literal interpretations of new and changing regulations. E.g. restrictions on Aluminium are taken to apply even to semiconductors containing trace amounts of Al, with no de minimis exemptions. Where complex alloys are covered e.g. incorporating Tungsten, trade in intermediate compositions not explicitly described in the regulation appear to be blocked. The latest Dec 24 restrictions from China are proving particularly problematic, with a very broad range of materials covered, with little expertise visible in their interpretation. Chinese exporters are also requesting a full list of final customers for products incorporating critical materials. Complying with such requests is prohibitive in many cases and is a further barrier to trade

Overall, there is a significant impact on sourcing raw materials. Especially those traditionally sourced from China. If persistent, such restriction may impact the ability to significantly scale high-value industries in UK in the longer term.

Noted, the UK has a Critical Minerals task force, which should be addressing issues, but it is unclear what actions are being taken. Further noted that fundamentally there are no shortages in key materials. Rather access is being restricted by geopolitics. Where alternative sources exist the impact of requalifying products as a low productivity activity distracting from other innovations needs to be fully understood by gov.

Action> PLG request input from the Critical Minerals task force to a future PLG meeting on short-term and long-term action plans, and how to comply, e.g. with requests for final material destination, how the task force can help, and what industry can influence?

Action> PLG raise the impact of trade restrictions with DSIT and encourage relaxation, and in particular, the incorporation of sensible de minimis interpretations and final customer reporting relaxation alongside tariff negotiations.

5) Trusted Research Reminder

The Centre for Protection of National Infrastructure (CPNI), has been rebranded as the National Protective Security Authority (NPSA) with an expanded remit to cover technology security.

Photonics is becoming an increasing focus of their attention as the importance of Photonics to key areas of economy and national resilience is being flagged.

NPSA will be running a number of campaigns aimed at increasing awareness of issues. PLG members are encouraged to review the latest Trusted Research advice, proactively review and update staff training, and increase vigilance. Note coverage extends beyond traditional cyber security training, export control and National Security Investment Act Compliance. As an industry we are encouraged to be proactive with best-in-class awareness and protective measures in place.

Those collaborating with / leading academic research programs are further encouraged to ensure programs take a proactive approach including for basic / low TRL projects.

Action> PLG arrange updated NPSA briefing at future meeting

6) Update UK photonics statistics 2025

John L outlined the process for updating the size of the UK Photonics industry. With data going back to 2010, the PLG's figures are highly respected and extensively referred to by gov, industry and academia.

The process remains unchanged from previous years and is outlined in detail in the [UK Photonics2023: the Hidden economy](#). A core part of the methodology is apportioning a fraction (factor) of the business of large diversified firms that are engaged in photonics alongside other technologies to the photonics industry. In common with most enabling technology and manufacturing sectors, the majority of photonics economic impact comes from a small number of large firms. Therefore, it is only necessary to review the contribution from the largest players.

The meeting reviewed the factor taken of the top 30 companies, making a number of both upward and downward adjustments. Of these the fraction of Openreach (the network portion of BT) to use generated the largest debate, with discussion highlighting the annual report notes that growth has been driven by full fibre rollout. 60% of Openreach up from 55% in 2023 was agreed upon. Other significant changes included account for the merger of Virgin Media and O2, revisions to the photonics contribution from Seagate technology with the launch of their photonics enabled HAMR products.

In addition for the 2025 update ~350 new companies have been added to the UK company list using the latest place-based search methodology.

Following factor revisions draft industry figures for 2024 are

- revenues £18.3 billion up from £15.2. Headline growth of 9.20% over 2 years, 9.5% CAGR
- employment 84,700 up from 79,100. Headline growth of 7.1% over 2 years, 3.5% CAGR

Like-for-like revenue growth which include only those companies in both the previous and current datasets is 7.6% CAGR.

Note although figures will be released this year the financial data lags by ~6-12 months due to company reporting timelines. Therefore the figure released in 2025 refers to the size of the UK photonics in 2024

Draft figures will be subject to final proof checking. This is unlikely to make significant material changes to the numbers with any changes likely leading to a slight reduction in the figures

a) Survey

To compliment the financial analysis, the meeting confirmed the PLG should repeat its previous survey to gather additional information on prospect for the industry. To better enable comparative analysis this will be mostly unchanged from 2023. *One question has been added on the impact of tariffs / trade restrictions*

Action> Please complete the survey by 31 May very latest <https://forms.office.com/e/c6BLuAxcuS>

b) Release plans

The revised figures will be incorporated into an update of the [UK Photonics2023: the Hidden Economy](#): naturally the 2025 edition. Support with updating the words within the report would be much appreciated. The report design will be carried forward from the previous edition

Release timeline:

- Headline figure released on Monday 23 June., in advance of the opening of Laser Munich world of Photonics
- UK Photonics 2025: the hidden economy. Updated edition available at Laser Munich in hard copy
- Presentation of core data to DSIT in July
- Presentation and complete statistical analysis at the next PLG meeting in July
- Public presentation of full analysis at Autumn UK Photonics meetings – UK Photonics 24-25 Sept. Photonics 10 October, Glasgow
 - Online recording of these will be made available on the PLG YouTube channel (yes we do have one)

Note those who have contributed to the PLG in 2025 have the option to have their logo included on the back page of the report. To be included we need to have received your contribution by the end of May

Action> contact John L to support updating content in the Hidden economy report.

Action> those who have made a contribution to the PLG in 25025 please forward latest logos to John L for inclusion and credit in the updated report. Those who have not made a contribution please do so by the end of May for inclusion

7) Engagement with the Parliamentary Science Committee in lieu of APPG

The PLG have been unsuccessful in reconvening the photonics and quantum APPG following the key supporting parliamentarians losing their seats at the last election. A new Semiconductor APPG has been setup, chaired by Ruth Jones, MP for Newport and is currently in the process of raising awareness with parliamentarians - <https://www.parliament.co.uk/APPG/semiconductors>. Sounding of parliamentarians indicate the number of APPGs is at saturation and more would struggle to gain support. To continue to engage parliamentarians the PLG has joined the [Parliamentary and Scientific Committee \(PSC\)](#). Founded in 1939, the PSC, formerly constituted as an APPG, is one of the oldest and most renowned non-governmental committees in parliament. The monthly meetings are sponsored by members and the PLG has booked the next available slot- 8 September 2026 for a photonics focused meeting and dinner. The PSC also publish a quarterly '[Science in Parliament](#)' magazine.

As members we can attend any of the monthly meetings of the PSC and the following dinners. Unlike many other APPG, the PSC is notable for the significant numbers of parliamentarians who engage with the group. Between the officers of the PLG we will aim to engage with the group regularly to raise awareness of photonics with parliamentarians and other members (which include most of the learned societies) and many other influencers. We also have the opportunity to place topical content in Science in Parliament including articles on topical technical topics (ideas welcome) and advertorial where we will place the latest update on the size of the photonics industry.

We will monitor engagement with the PSC over the next couple of years to ascertain the impact and value compared to running an independent APPG.

If any PLG members would like to attend upcoming [PSC meetings](#) on the PLG's behalf please contact John L.

8) Community updates

a) Photonics Scotland

Technology Scotland has been instrumental in presenting a super cluster of critical technologies in Scotland combining photonics, semiconductors, quantum, connectivity and sensing. This has been instrumental in increasing engagement with the Scottish Parliament where the super cluster is now recognised by key ministers. One of the impacts is an expanded role for Technology Scotland across all of the super cluster areas that will see an expansion in Technology Scotland personnel.

b) Photonics21

The Photonics21 AGM will take place in Brussels 15-16 May, with a number of PLG members present. The core focus of the AGM will be:

- a) Positioning photonics within the next Framework 10 programme. The former is a delicate balance in supported expanded support for photonics within the EU chip programme whilst simultaneously advocating for an independent photonics program. The PLG has been extensively supporting the draft position paper which includes a request for €2 billion in support over 7 years (a 3-4 fold increase over the last framework program) supported by €200bn in industrial investment. The balance is similar to the UK where the main axis of photonics support come through the quantum program and in the future the semiconductor program.
- b) updating the strategic research and innovation agenda (SRIA, ie. the P21 photonics roadmap) for the next framework program and the envisaged split between areas supported by the Chips act and areas outside the EU Chips act.
- c) *The latest indications from the European Commission at the P21, indicate a potential alternative path with the remit of Chip Act ii expanded to include photonics systems. Noting that a very expansive view of Chips Act should be taken.*

An EU-focused working group of the PLG has been established and met on the 29 April to support those new to engaging with P21 and coordinate the UK approach. Additional members are welcome. The group will meet two weeks before and two weeks after every board of stakeholder meeting.

c) **Photonics Connected (Wales)**

- Wales Tech week 24-25 November 2025 including significant Photonics coverage <https://www.walestechweek.com/>

Following a future strategy meeting no additional activity

d) **Innovate_UK**

Currently open competition [Developing Semiconductor Hardware For Critical Technologies](#) likely to be the last in the current 25-26 spending review year due to the challenges of launching awarding and spending funds by April 2026.

Additional calls in Quantum are likely.

e) **AILU**

AGM and laser safety workshop on 21st of May. Ric Allott will be stepping down from second term as president at this AGM- <https://www.ailu.org.uk/events/>

Highly successful ILAS in March saw recorded attendance and excellent atmosphere.

f) **Cornerstone C-PIC IKC**

Cornerstone IKC C-PIC survey seeks input on how C-PIC can best support organisations and individuals interested in deploying silicon photonics and/or those who are part of the wider supply chain.: https://southampton.qualtrics.com/jfe/form/SV_0BSnFG7Cck3r9ae open until 6 June

C-PIC knowledge hub workshop 29 May, online, 9:30 - 11:30 to gather input on the features that should be included in the knowledge hub portal (an online portal) to serve the wider silicon photonics community.

The portal's purpose is to connect organisations, experts and their customers. Workshop registration https://forms.office.com/pages/responsepage.aspx?id=-XhTSvQpPk2-iWadA62p2GULuaP6EphGpAdcxu_FKwJURFdDWlhWUIhBS0tDT1ZUTkFENkplSDRaSy4u&route=shorturl

PIC Bootcamp, a hands-on training course on integrated photonics. Developed with input from the industry, the course provides a practical introduction to the essential steps for creating integrated photonic devices—from design to packaging. : <https://www.picbootcamp.co.uk/>

g) **CS connected**

- European Conference on Integrated Optics, Cardiff 10-12 June <https://www.ecio-conference.org/>

h) **Optica** https://www.optica.org/industry/industry_events/

- [Optica Online Industry Meeting: Defense & Security](#) 20 May 2025, 10:00 AM - 11:30 AM. Note this meeting will no be recorded or available other than through live participation.
- **Quantum industry Summit, Bristol November 11-12 Nov, Bristol**
https://www.optica.org/events/industry_events/2025/optica_2025_quantum_industry_summit_fourth-edition/

i) **Future Leaders group**

The Future Photonics Leaders group has successfully gain new momentum.

- They will be running a Careers insight panel at Laser World of Photonics, hall B2 **10:00–11:00 Friday, 27 June** Timed on the Friday to coincide with the new 'Young Talent Day', the group have secured an impressive pan European panel including David Gillett, CEO, Laser 2000 (UK), Gabrielle Thomas, Group Leader Marketing, Menlo Systems, Richard Carter, Associate Professor, Heriot-Watt University, Martin Weinacht, Managing Director and Senior Director of Engineering, Edmund Optics. As well as providing useful insights to a pan Eu audience the event will provide high profile visibility for the group.

- The group has also launched a series of events aimed at strengthening the photonics community across the UK. The pilot event in this **LightTalks series** will take place in **Glasgow on Thursday, 29 May 2025, 18:00–22:00**.. The group has secured an outstanding list of speakers from UK and Europe. [Registration is open](#). The plan **going forward** is to host these events in **photonics hotbeds across the UK**.

j) **UK Photonics meetings**

Microelectronics UK

Registration for Microelectronics UK incorporating photonics UK at EXCEL centre 24-25 September is now open <https://microelectronicsuk.com/>. IQPC continue to promote strongly. The PLG have contributed information to promotion article.

UK Photonics annual meeting (Photonics for growth) (Simon A)

Plans continue to stand up a new UK photonics annual meeting to replace Photonex. Title remains a work in progress. Date and location fixed. Friday 10th October, TIC, Glasgow

k) **EPSRC**

EPSRC are currently conducting a survey of ICT theme landscape to identify priority areas in which to support future moonshots.

Action> please complete EPSRC survey at

l) **South Devon – Torbay Hi-Tech Cluster (THTC)**

The Electronics & Photonics Innovation Centre (EPIC) now full, with 7 out of 15 tenants being photonics companies, a mixture of mature and start-ups.

Money secured during last round of levelling-up to build a EPIC phase II Technology Park, to enable growth companies to emerge from original EPIC Centre and scale-up, freeing space for new companies. Due to change of government, the completion date for the new Technology Park will be March 2028.

9) Next meeting

The Next meeting will be in late July 2025 , fully online and feature presentations of the latest UK photonics industry data.

The following meeting will be on the 9 October at the Technology and Innovation Centre in Glasgow prior to the new UK Photonics meeting.