

ECSEL

Goals and Mission

Current Status & Trend

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ECSEL JU

Outline

- ECSEL Goal & Mission
- RIS3: Smart Specialization Cohesion Policy
- The Italian de-committment on high tech in EU
- ECSEL
 - 2015 Preliminary results
 - 2016 Draft work plan
- The ECSEL Eco-system
- Conclusion: what's next?



ECSEL Goal & Mission

- Implement Horizon 2020:
 - Investing in knowledge and innovation
 - Smart, sustainable and inclusive growth
- Build upon ARTEMIS/ENIAC JU experience:
- Federating Nanoelectronics, CPS, Smart Systems
- 3-way funding
 - The Union (1.17B€)
 - The ECSEL Participating States (>1.17B€)
 - The Private Members (~ 5B€, minus grants)

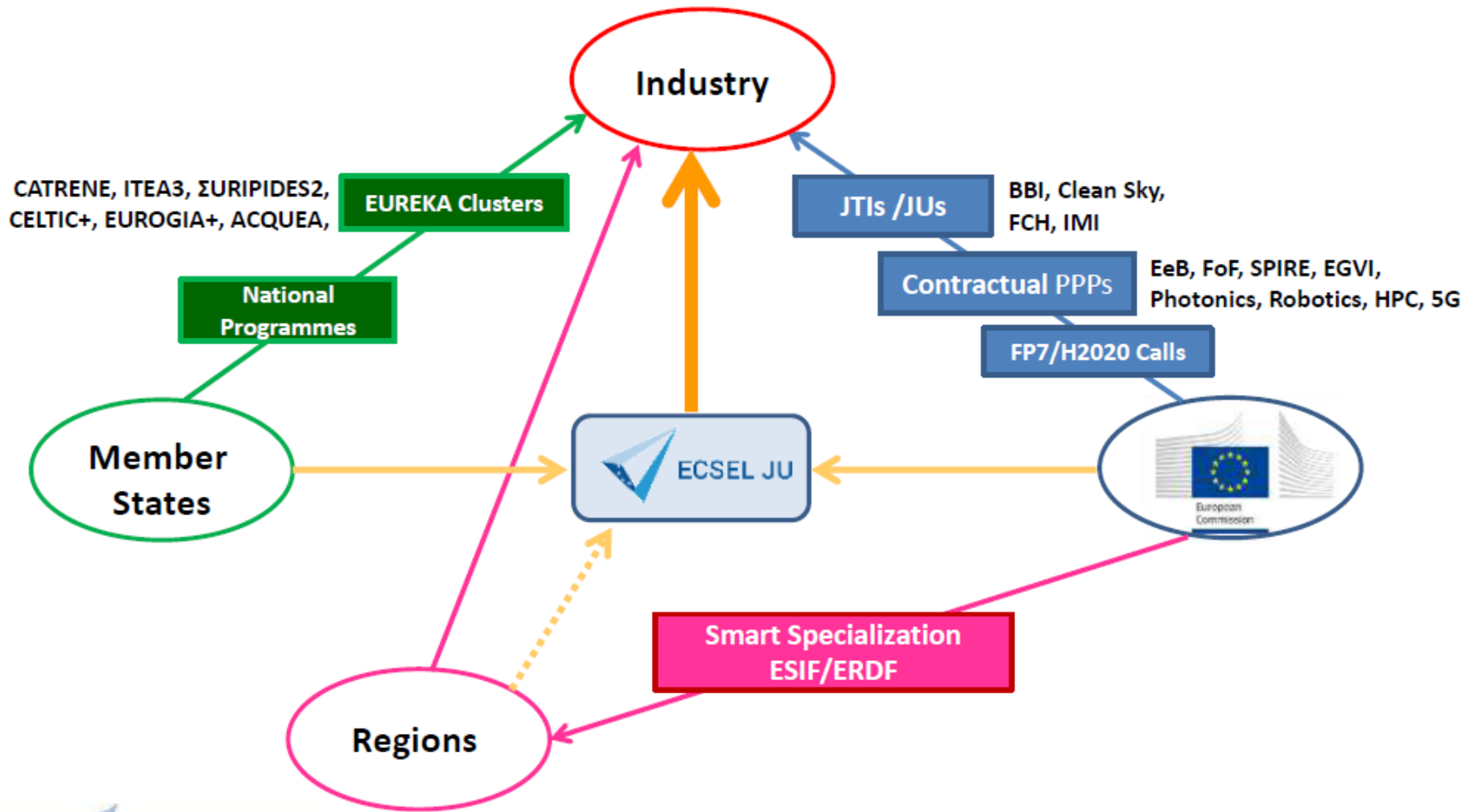


The Joint Undertaking's funding mechanism

- Mechanism to implement ERA/JTI towards
 - three-way funding (EU, MS and Regions, Private)
- Funding a project also labelled by EUREKA / CATRENE (now PENTA)
- Implementation of KET policies : Pilot Lines
- Projects combining EU funding mechanisms with national and regional (ESIF/ R&D)



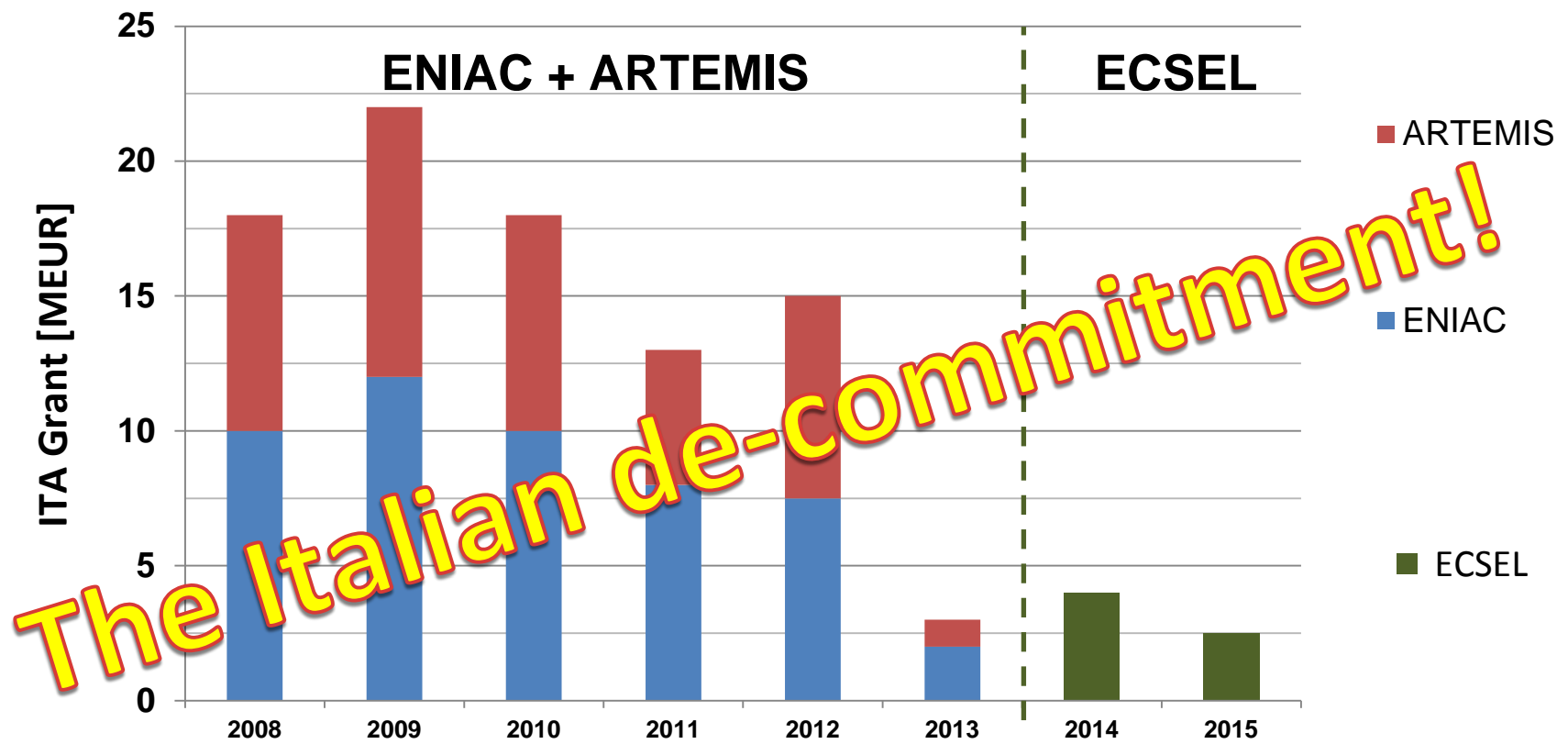
European support to the Industry



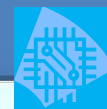
JTI on period 2008-2015

How Italy stepped out from high tech in EU!

- During 8 years, the total funding from Italy has been dramatically shrinking!



RIS3: Smart Specialization Cohesion Policy

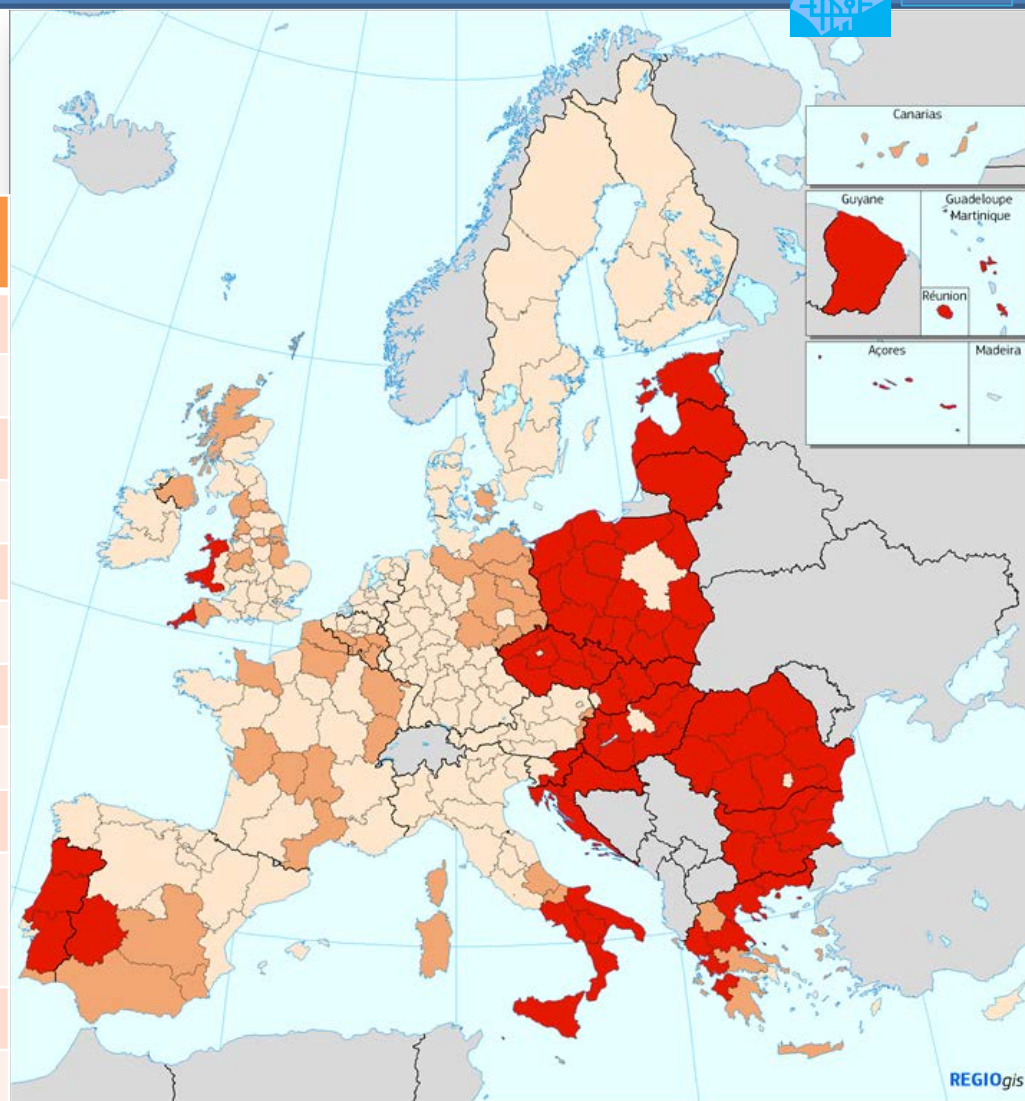


3'34"

Eligibility map 2014-20

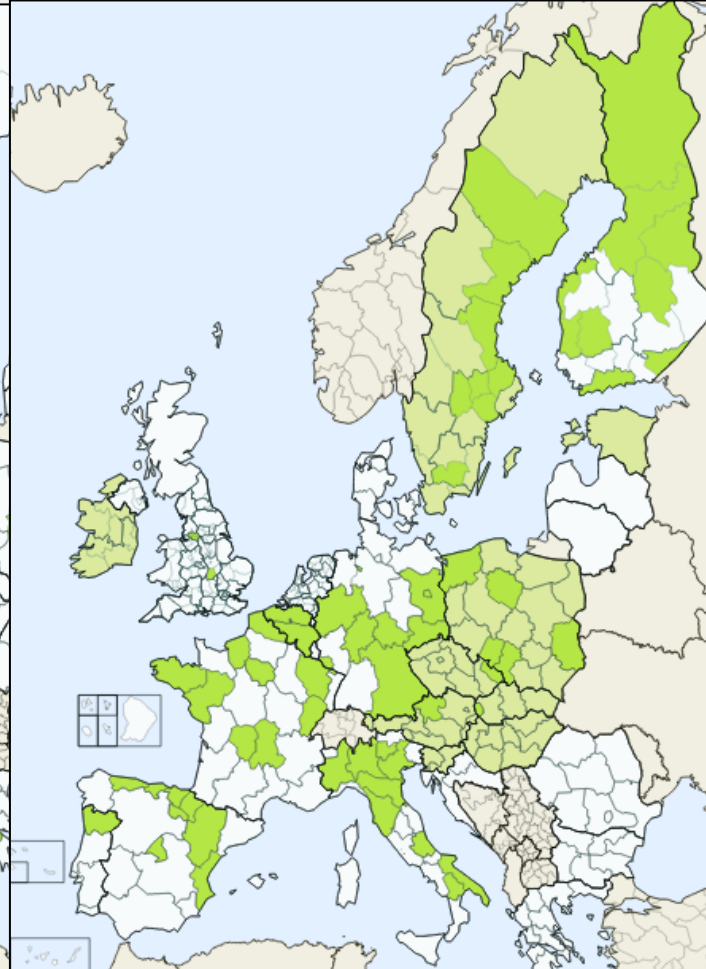
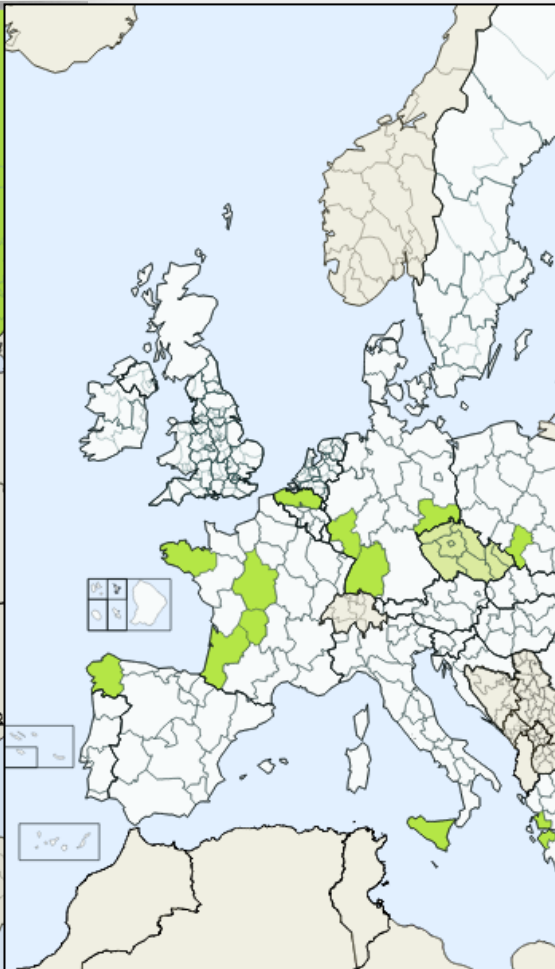
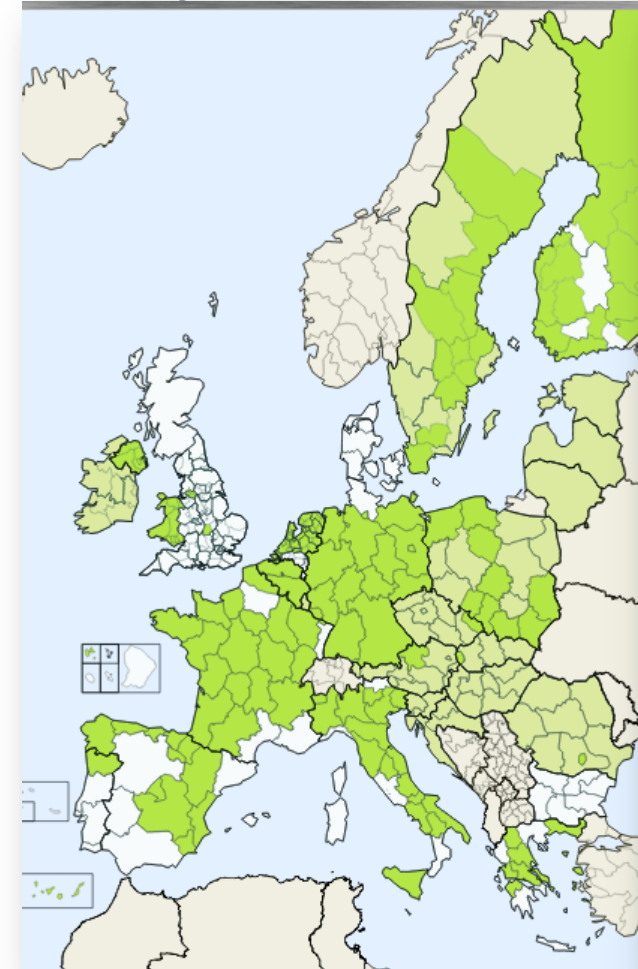
- Less developed region (GDP/head: less than 75%)
- Transition regions (GDP/head between 75% and 90%)
- More developed region (GDP/head: more than 90%)

	Billion EUR
Less developed regions	164.3
Transition regions	31.7
More developed regions	49.5
Cohesion Fund	66.4
European territorial cooperation	8.9
<i>Of which</i>	
<i>Cross border cooperation</i>	6.6
<i>Transnational cooperation</i>	1.8
<i>Interregional cooperation</i>	0.5
Outermost regions and northern sparsely populated regions	1.4
Youth Employment initiative	3.0
TOTAL	325.1





Priority: **KETs** **KET/Nanoelectronics** **Adv. Manufacturing**

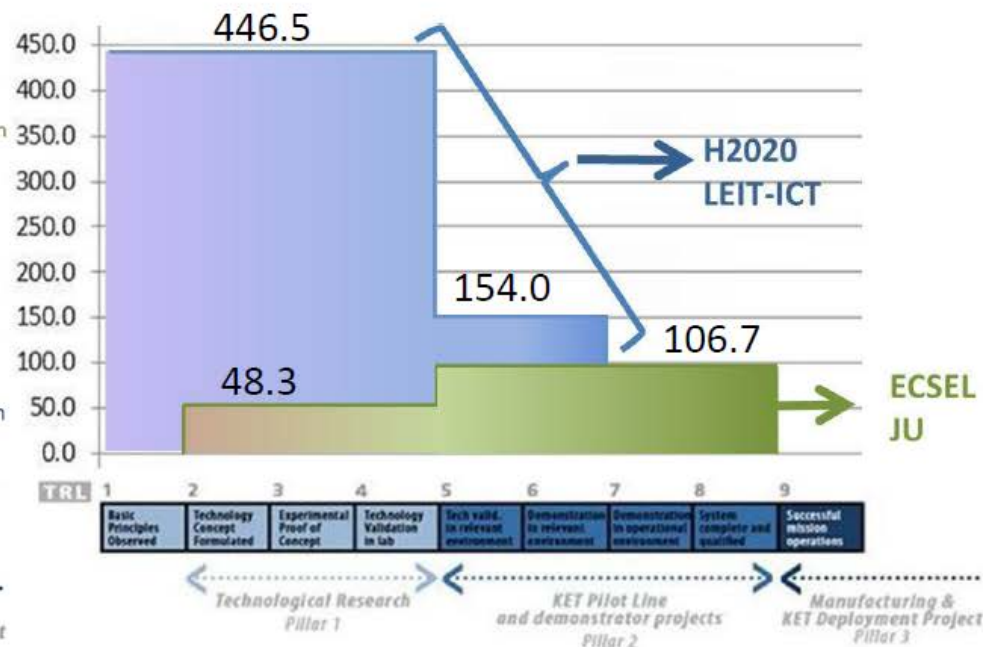
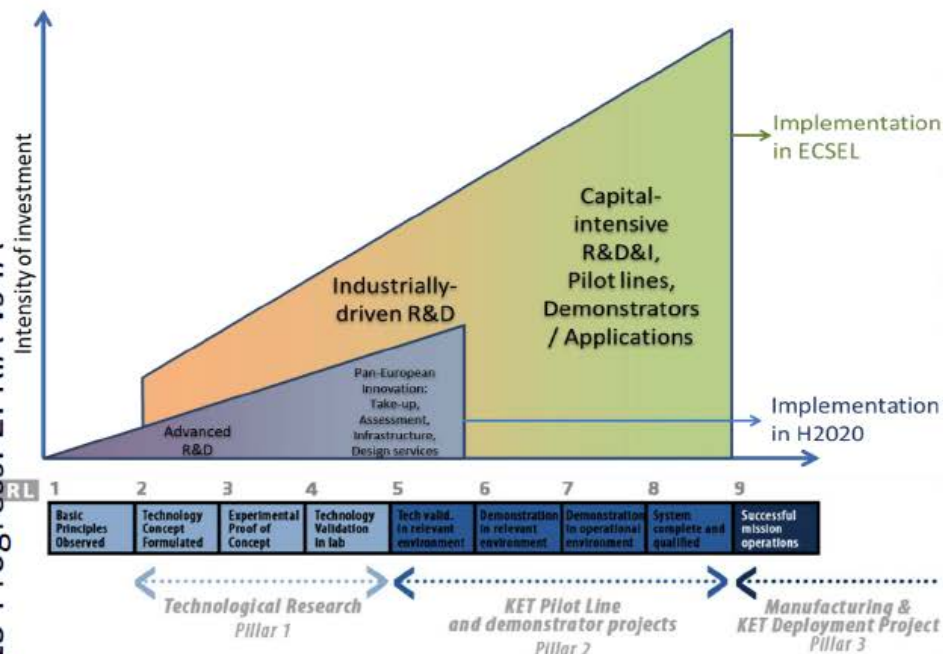


The complementary role of ECSEL and H2020 ...reality differs from expectations!

Theory...

... and Practice

2014 Data



ECSEL JU

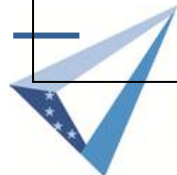
ECSEL 2015: results (62 submitted)

- RIA: 8/51 retained

Project Name	Legal Name of Coordinator	EPS	H2020 costs	EU funding
SafeCOP	ALTEN SVERIGE AKTIEBOLAG	SE	11,580,313.75	3,777,298.39
3DAM	FEI ELECTRON OPTICS BV	NL	22,396,421.25	6,582,943.94
AMASS	FUNDACION TECNALIA	ES	20,481,701.00	6,211,766.72
REFERENCE	S.O.I.TEC SA	FR	33,144,876.25	10,068,823.82
PRIME	IMEC VZW	BE	38,847,240.25	12,199,487.08
DELPHI4LED	PHILIPS LIGHTING B.V.	NL	9,594,705.50	2,834,446.33
DENSE	DAIMLER AG	DE	14,439,980.00	4,221,232.63
ASTONISH	PHILIPS MEDICAL SYSTEMS BV	NL	18,334,603.75	5,895,046.38
	TOTAL		168,819,841.75	51,791,045.29

- IA: 5/11 retained

Project Name	Legal Name of Coordinator	EPS	H2020 costs	EU funding
EnSO	STMICROELECTRONICS (TOURS) SAS	FR	79,273,401.25	19,187,775.85
IoSense	INFINEON DRESDEN	DE	65,693,056.25	14,764,298.44
ENABLE-S3	AVL GMBH	AT	68,433,166.75	16,691,820.43
TAKES	ASML B.V.	NL	152,292,783.75	29,104,151.38
Semi40	INFINEON AUSTRIA	AT	61,908,342.50	12,227,386.21
	TOTAL		427,600,750.50	91,975,432.31



ECSEL 2015: Italy reached the bottom!

- Italy 2015
 - Initial budget: 2.5 MEUR allocated to RIA only
 - Result: only 1.4 MEUR spent on both RIA and IA.
- Despite the nanoscale budget, Italy has not allocated the full money either!



2016: draft ECSEL workprogram

- 15 March 2016 Call opening
- 24 May Deadline PO
- 21 Sept Deadline FPP

Calls: RIA, IA, Flagship ??

- *Lighthouse initiatives should address concrete measures to facilitate deployment and should include an effective outreach strategy.*
- *Projects for the lighthouse initiatives shall be adopted out of the projects selected for funding by the PAB in the two calls 2016.*

JU Funding rates for Industry (not negotiable)

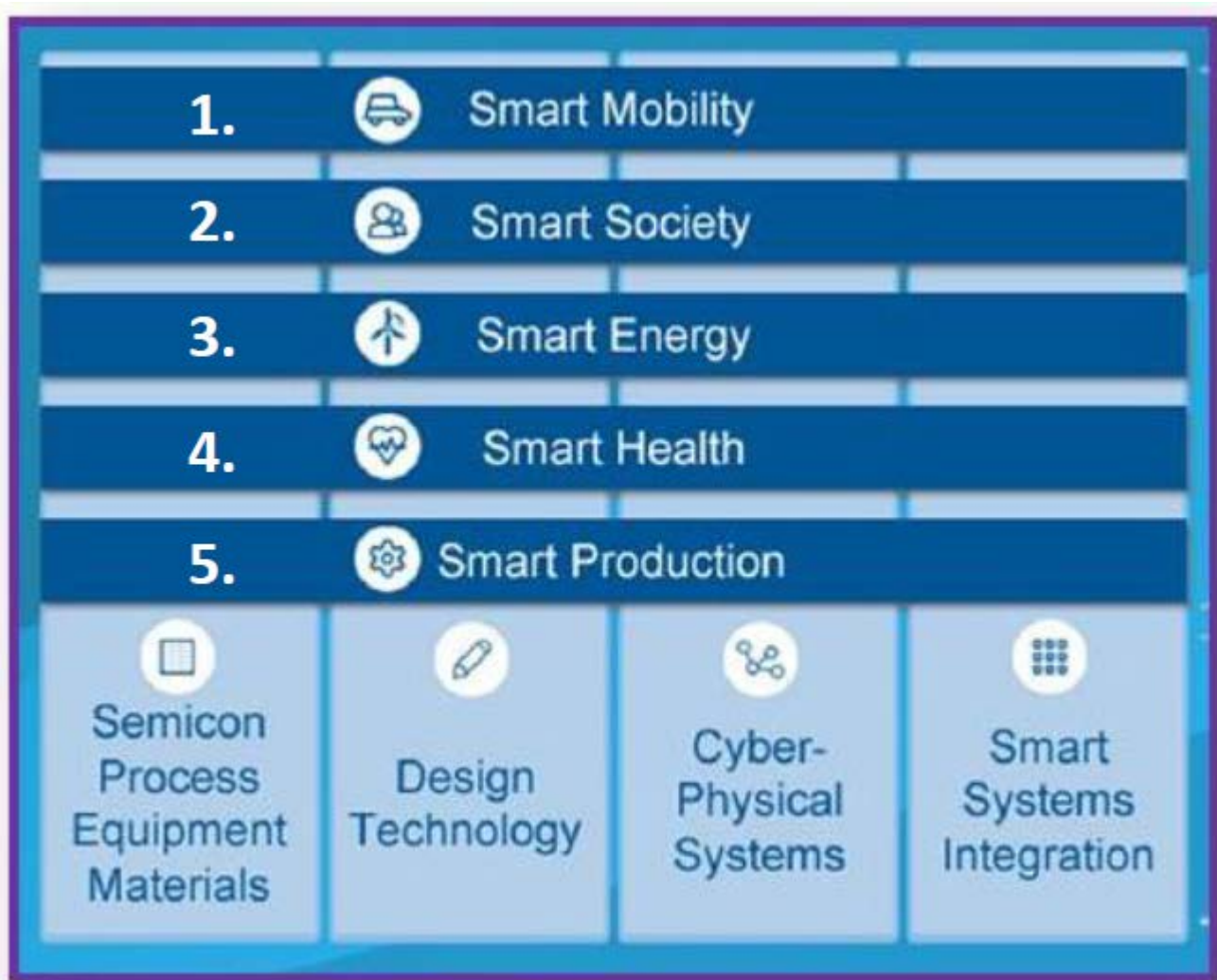
- Funding rate: RIA 25%, IA 20%
- Total JU Budget: 150 MEUR

RIA: 50 ME IA: 100 ME

...Flagship: postponed



ECSEL 2016 draft Work Plan

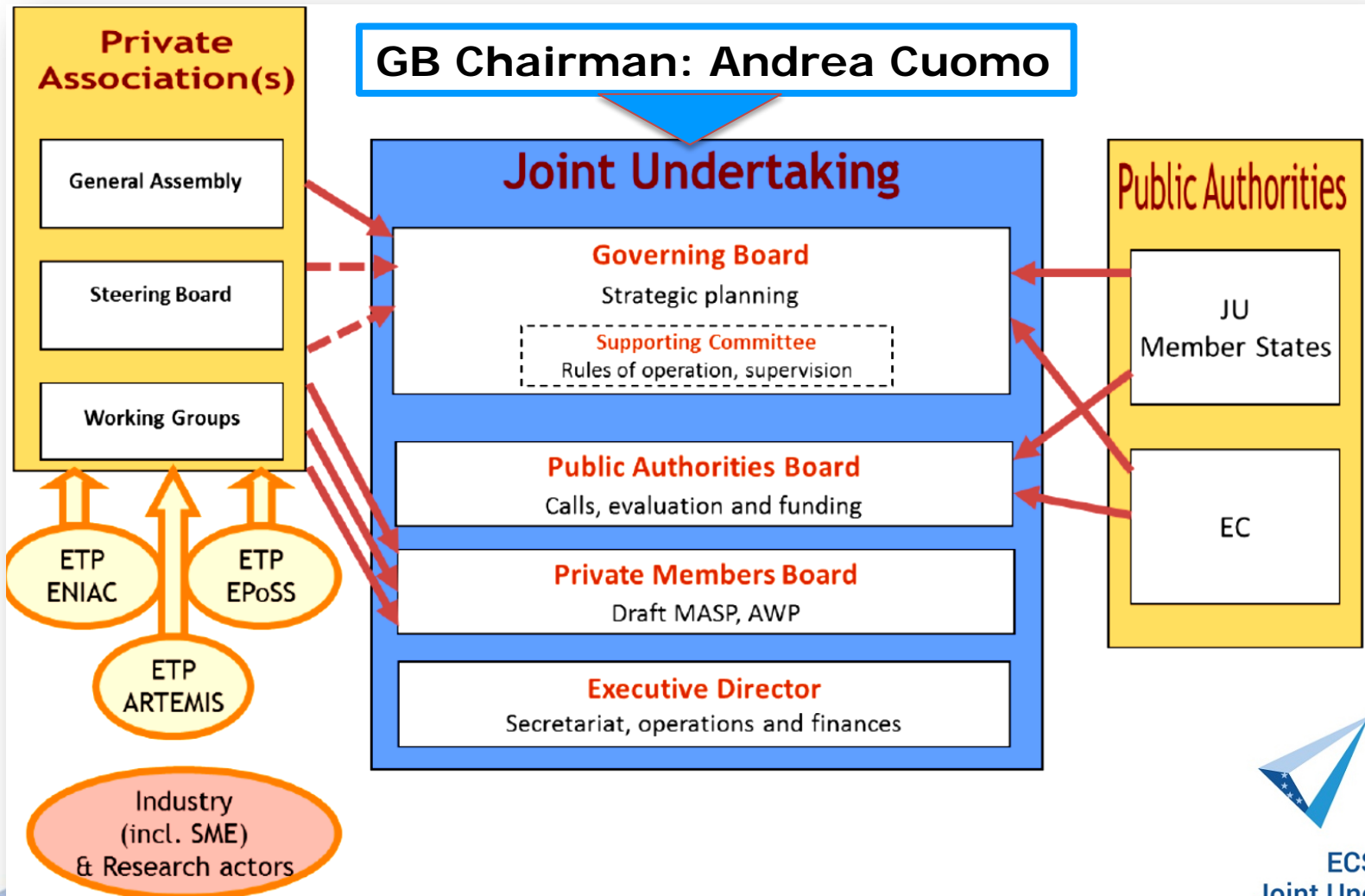


ECSEL JU



ECSEL
Joint Undertaking
Electronic Components and Systems
for European Leadership

ECSEL Governance

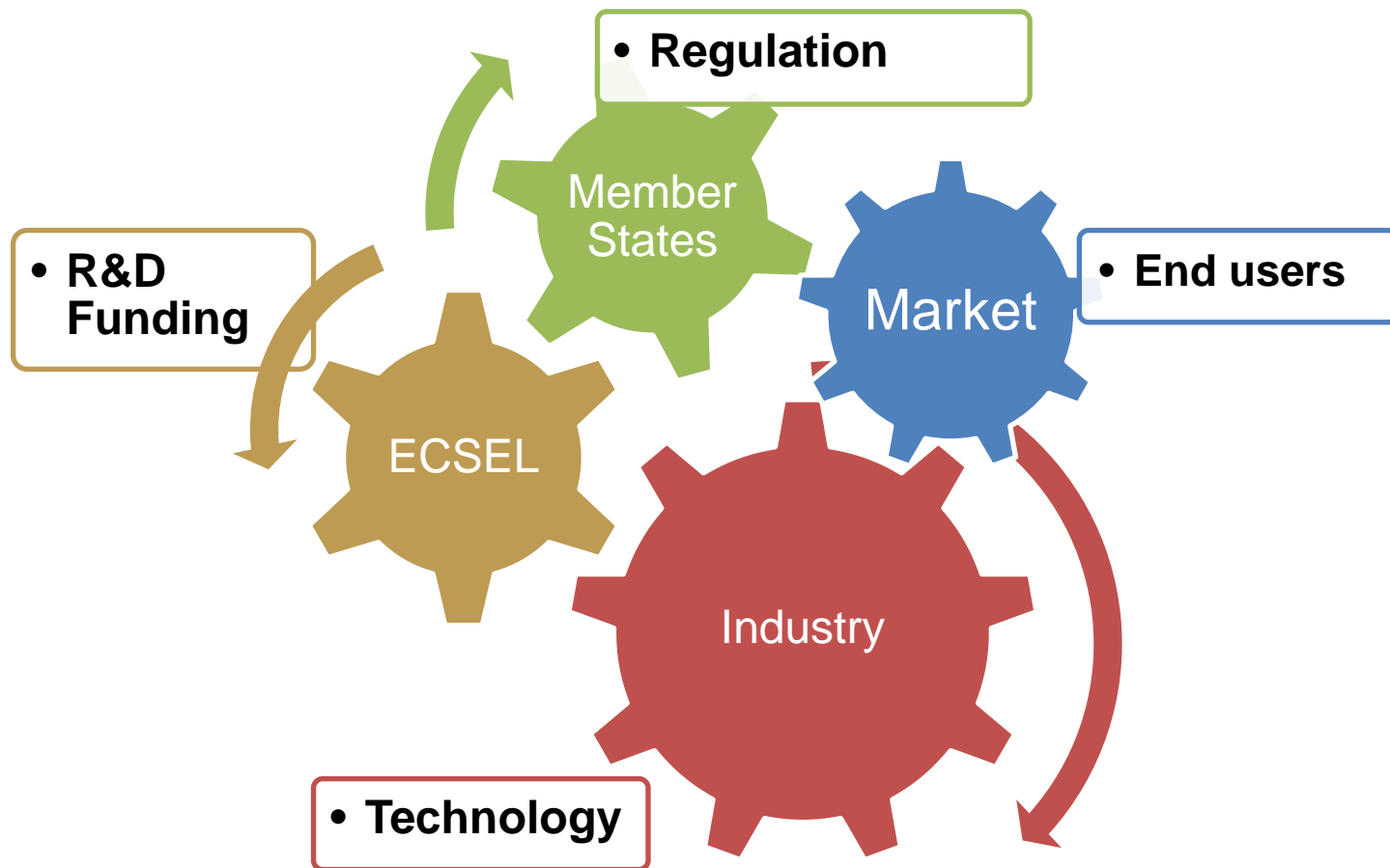


Risks and Opportunities

- Europe has 500M+ customers
- So far Europe has been slow in developing and standardizing visionary solutions
- Seldom have Public Authorities and Industry cooperated to develop technology and setting standards. The famous exception, GSM, was a great success!
- These discontinuities can be a huge opportunity if well played, or huge risks if Europe falls behind



THIS IS THE ECSEL ECOSYSTEM!



We need...

- **Speed** is of utmost importance. While we discuss and negotiate, others build standards de facto and impose them in the market.
- **Ecosystems** are essential. If we miss one key part, in any level of the value chain, the whole program will flop.
- **Real Leaders, Great Vision and Deep Cooperation** to drive the process, making sure results are consumer driven and and quickly deployable.

