

CASE STUDY →!

PIC SUMMIT

PIC SUMMIT EUROPE 2025

CASE 08

STRATEGIC
QUESTIONS

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ABOUT PIC SUMMIT

PIC Summit 2025 is Europe's leading event for the photonic integrated circuits (PIC) industry, bringing together researchers, designers, manufacturers, and policymakers shaping the future of integrated photonics. Organised by PhotonDelta, the summit connects the global PIC ecosystem to accelerate innovation, commercialization, and collaboration. It features two days of keynotes, exhibitions, and co-creation sessions driving scalability, maturity, and international collaboration.



EVENT CONTEXT

Held in Eindhoven, The Netherlands, PIC Summit 2025 occurs at a crucial turning point for the integrated photonics industry. With hundreds of engineers, suppliers, chipmakers, and investors attending, it reflects the sector's rapid evolution from research-driven initiatives to scalable, industry-wide collaboration, aligned with the PhotonDelta strategy for ecosystem growth.

WHO IS ORGANISING THE CHANGE?

PhotonDelta, founded in 2016 and formalized in 2019, is the national growth accelerator for photonic chip technology. Following €1.1 billion in funding secured in 2022, it drives the Dutch integrated photonics ecosystem. PhotonDelta organises the annual PIC Summit (first held in 2022, now in its 4th edition in 2025) — as a co-created experience uniting research, industry, and innovation hubs to strengthen collaboration and shared purpose.

WHAT WAS THE CHALLENGE?

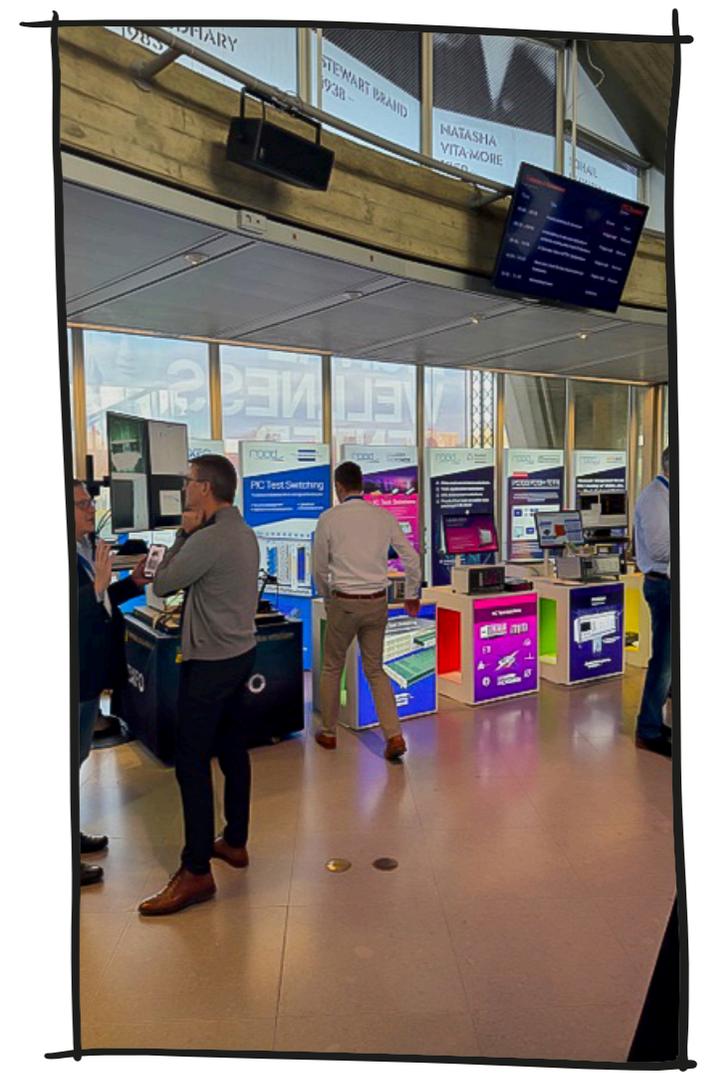
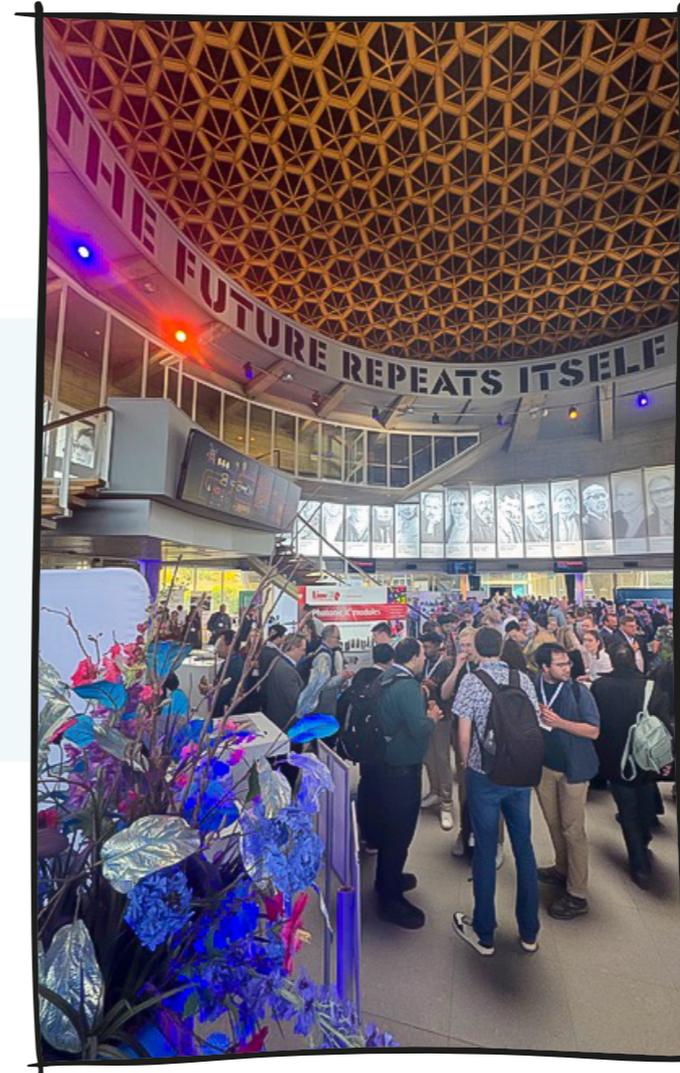
The challenge is to unite a fragmented, highly technical ecosystem into a coherent community with a shared vision for scaling photonics. The event must balance technical depth, strategic alignment, and human connection through content curation while demonstrating its value and budget neutrality for PhotonDelta and retain Eindhoven as its epicenter.

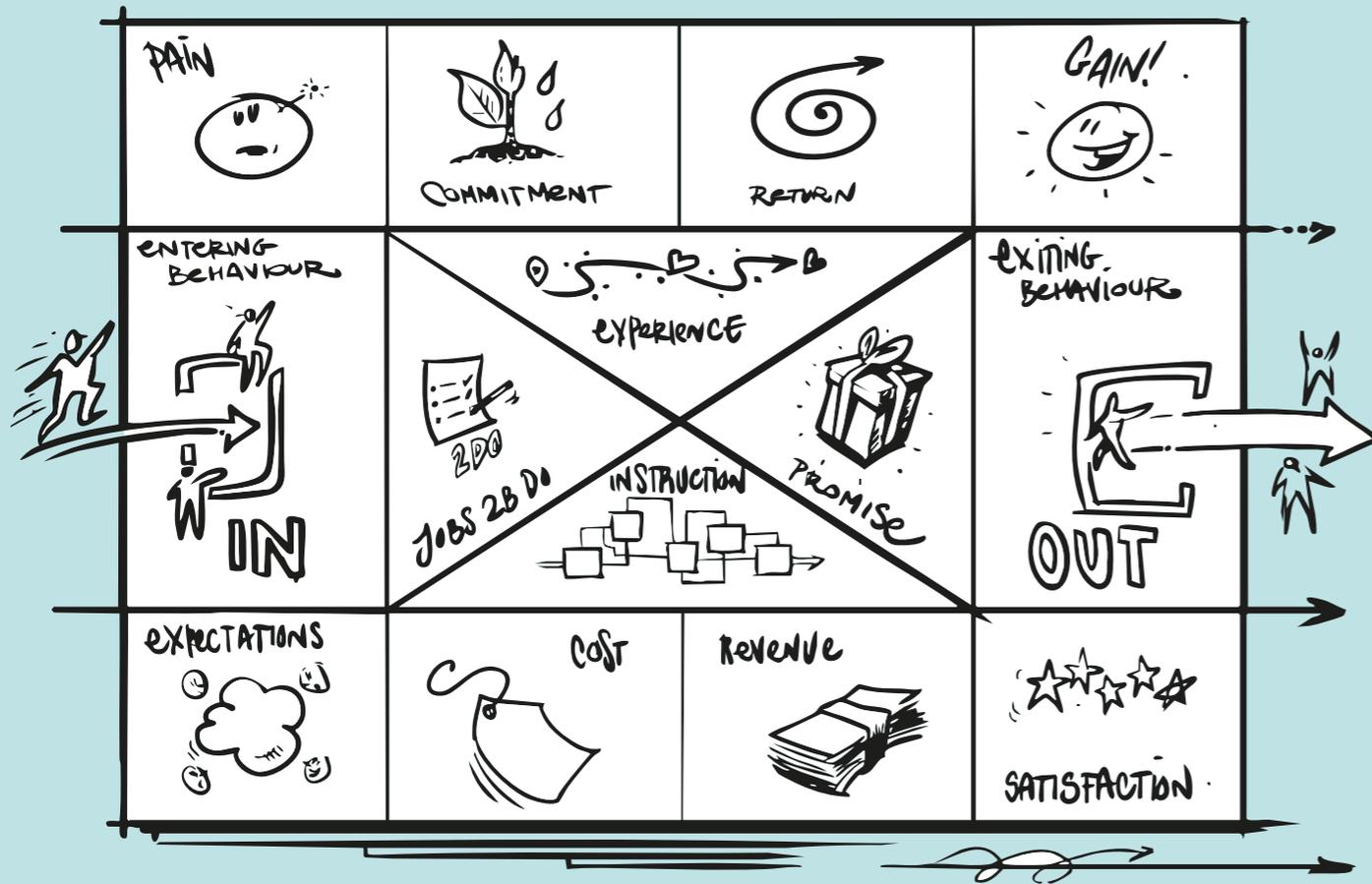
WHO ARE THE MAIN STAKEHOLDERS?

Event Owner is Photon Delta, PIC Summit Europe is a focused B2B conference (with a compact tech-expo and multiple side events) serving the photonic integrated circuits (PICs)/photonic chips ecosystem. It convenes designers, foundries, tool vendors, integrators/OEMs, end-users, investors and policy makers to discuss scaling production, applications and funding.

THE EVENT DELTA

Before the event, the ecosystem was technically advanced but fragmented—each actor focused on their niche. After PIC Summit participants identified alignment opportunities, gained clarity, and renewed motivation to collaborate across the value chain. The event shifted mindsets from operating in isolation to identifying collaboration opportunities, strengthening belonging and shared purpose essential for reaching the industry's next phase.





EVENT DESIGN *collective*

©EVENT DESIGN COLLECTIVE GMBH

EVENT NARRATIVE

PIC Summit Europe 2025 marked a defining moment for the integrated photonics industry—an inflection point where innovation, collaboration, and scale converged. Over two immersive days, 700+ participants from across the globe engaged with 60+ expert speakers and 20 interactive sessions, bridging policy, research, and industry implementation. With 40+ international partners, the event showcased Europe’s growing leadership in photonic integrated circuits (PICs) while connecting the global ecosystem driving this transformation.

Day 1 set the tone with a curated sequence of keynotes and panels mapping the entire photonics value chain—from policy frameworks to high-volume manufacturing. Following a warm welcome by host Irene Rompa and PhotonDelta CEO Eelko Brinkhoff, the morning explored the scaling challenges and opportunities defining the sector. Industry giants such as ASML, TSMC, Tower Semiconductor, and Hon Hai Research Institute shared how advanced lithography, 3D stacking, and co-packaged optics are enabling the AI revolution while creating demand for next-generation photonic components.

A key highlight came from the European Commission and PIXEurope, emphasizing the importance of coordinated public-private initiatives and open-access pilot lines to accelerate PIC industrialization. The morning’s insights were complemented by a vibrant exhibition floor, where technology providers and start-ups demonstrated the tangible progress toward ecosystem maturity.

Afternoon breakouts and panels translated these insights into action. Sessions led by iPRONICS, Jabil, and Black Semiconductor showcased large-scale programmable photonics,

advanced packaging, and material innovation. Parallel panels on quantum photonics, venture funding, and international collaboration reflected the sector’s interdisciplinary nature. The Braiding Session spirit emerged organically, as engineers, policymakers, and investors exchanged perspectives on shared infrastructure and standardization.

By late afternoon, attention shifted to future applications. Applied Materials detailed how AR photonics is scaling from lab to production, while imec closed the day by calling for sustainable innovation and deeper ecosystem collaboration. The energy carried into the networking dinner, where meaningful connections were forged across continents—demonstrating the Summit’s “Stronger Together” ethos in action.

Day 2 pivoted to applied innovation. Tracks on novel materials, quantum photonics, computing, and sustainability highlighted the diversity of photonic applications—from Si-Phox’s at-home diagnostics and MantiSpectra’s miniaturized spectral sensing for health/agrifood to NVIDIA’s AI-native optical systems. The morning’s PhotonDelta Innovation Award celebrated Percepra for its ultra-compact Raman analyzer—symbolizing the spirit of scalable, real-world impact.

The day concluded with PhotonDelta CTO’s ecosystem roadmap and a closing dialogue reaffirming the collective ambition: to transition Europe’s PIC industry from promise to production.

PIC Summit Europe 2025 wasn’t just an event—it was a catalyst. It measured success not only in participants, partners, or sessions, but in shared intent: to design a future where integrated photonics underpins sustainable, intelligent global systems.

THE DESIGN PROCESS

“In 2023, Team PhotonDelta and the Event Design Collective collaborated to design the 2030 PIC Summit landscape, creating a shared vision and a rough outline of strategic steps grounded in ten design principles. This framework set the course for how the annual summit could evolve into a key platform driving Europe’s photonic integrated circuits (PIC) industry toward global maturity. The design principles emphasized ecosystem collaboration, strategic alignment with the PhotonDelta roadmap, community building, and scalable impact—ensuring that each successive edition would move the ecosystem closer to its 2030 goals.

Building on this foundation, PhotonDelta designed and delivered the 2025 PIC Summit based on insights and progress from the initial editions in 2022, 2023, and 2024, making 2025 the fourth edition. The early summits focused on shaping a shared understanding of the photonics landscape and connecting stakeholders across the value chain—from research and design to manufacturing, testing, and applications. Each edition served as a milestone, translating the long-term vision into concrete steps and measurable progress.

The 2022 launch edition introduced the summit as a convening platform for the emerging PIC ecosystem. In 2023, the collaboration with the Event Design Collective formalized the strategic framework and established a clear narrative structure for future editions. The 2024 summit built upon this foundation by broadening its international reach, strengthening cross-sector dialogue, and integrating policy perspectives to accelerate industrial scaling.

By 2025, the PIC Summit had matured into a comprehensive ecosystem platform—a convergence of policy, technology, and collaboration. Through curated keynotes, interactive braiding sessions, and targeted networking formats, the event translated strategy into action, embodying the “stronger together” ethos. The 2025 edition marked a proof of concept for how intentional event design can accelerate ecosystem

growth and reinforce Europe’s leadership in integrated photonics on the path to 2030.”

THE BRAIDING POINT

As PhotonDelta reached the fourth edition of the PIC Summit, a pivotal reflection emerged within its leadership team. While the Summit has become a recognizable gathering for the integrated photonics ecosystem, questions surfaced about its precise value, purpose, and alignment with PhotonDelta’s long-term mission. The event’s rapid evolution — from its early editions in 2022–2024 to the expanded 2025 format — has generated momentum and visibility but also raised strategic questions about ownership, function, and sustainability.

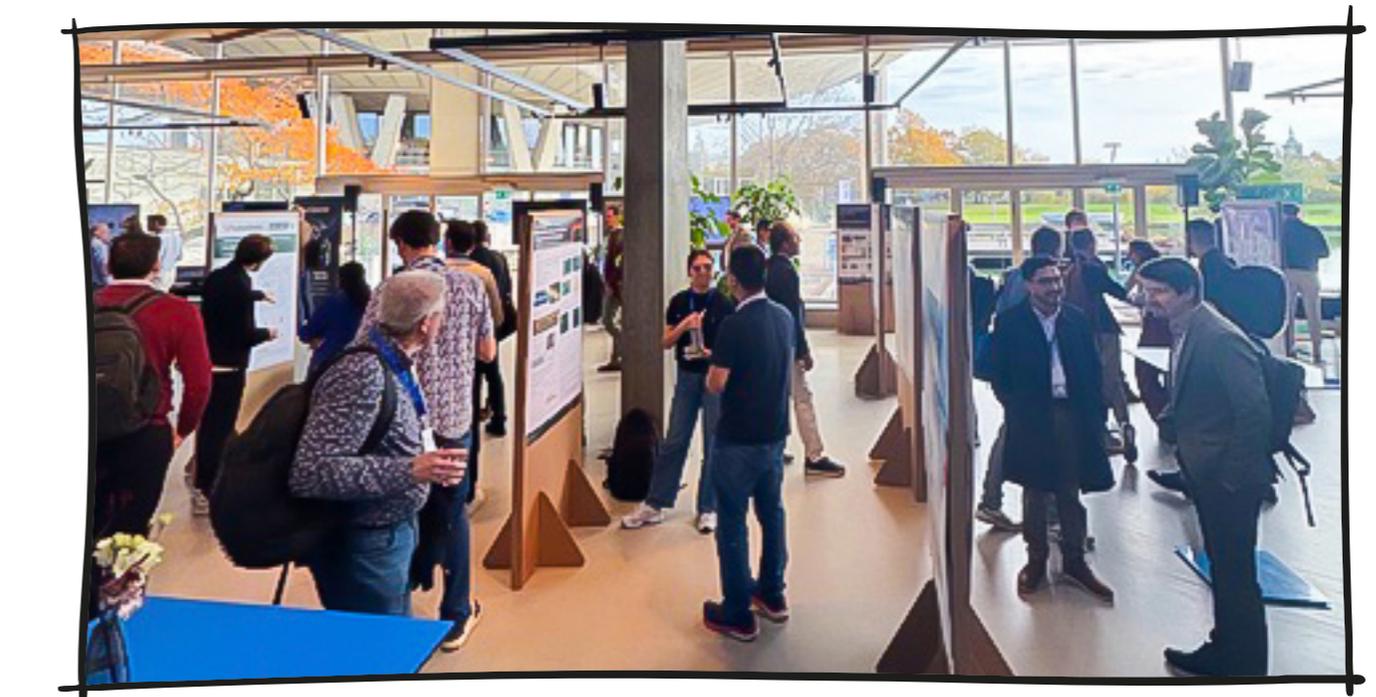
The leadership now stands at a critical braiding point: to reframe the PIC Summit not merely as an annual event but as an intentional instrument of PhotonDelta’s strategy. Three areas require collective sense-making and redefinition.

1. Mandate and Function.

The first step is to clarify the Summit’s role within PhotonDelta’s mission. Is it the ecosystem’s flagship event — a stage to unite, inspire, and accelerate collaboration across the photonics value chain? Or should it primarily serve as PhotonDelta’s positioning tool — a strategic platform to communicate leadership, showcase results, and reinforce brand authority? Anchoring the Summit’s purpose within PhotonDelta’s overall strategy and OKRs will enable coherent value creation, align investments, and ensure relevance to both internal and external stakeholders.

2. Sustainability and Operating Model.

The second challenge concerns sustainable execution. The leadership recognizes the need to align ambition with available capacity. This requires redefining ownership structures, delineating in-house versus outsourced responsibilities, and designing a delivery model that is operationally resilient.



Balancing creative excellence with pragmatic resource allocation will determine whether the Summit can scale effectively without overstressing the organization.

3. Strategic Sequencing.

Finally, timing matters. The Summit’s strategy must not precede PhotonDelta’s overarching strategy but instead serve as a deliberate lever to advance it. Once PhotonDelta’s long-term direction is finalized, the PIC Summit can be intentionally designed to amplify those priorities — from ecosystem growth and talent development to global positioning.

This braiding point marks a transition from iteration to integration. It invites the leadership team to weave purpose, process, and performance into a single, cohesive narrative — one where the PIC Summit becomes not just a recurring event, but a strategic catalyst embedded within PhotonDelta’s mission to accelerate the integrated photonics industry.

NEXT

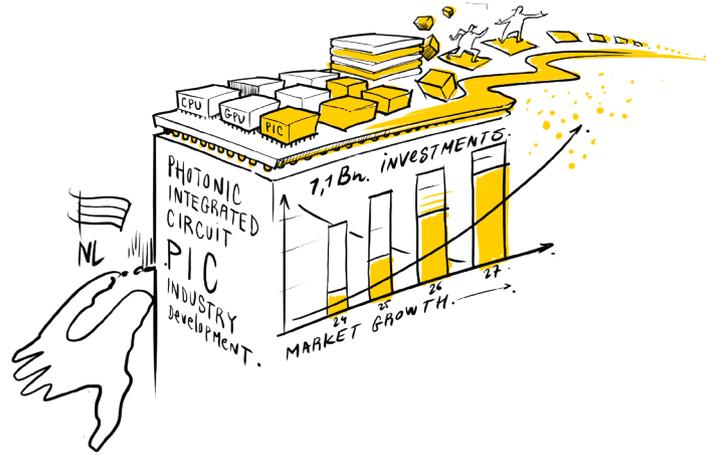
PhotonDelta aims to make PIC Summit Europe the annual convergence point for its ecosystem and beyond. The PIC Summit addresses the challenge of fragmentation within the European photonic integrated circuit (PIC) ecosystem. As nascent world-class research and promising technologies, the industry struggles with limited coordination, siloed initial development, and a lack of shared strategic direction. Stakeholders across research, manufacturing, and application domains often operate independently, slowing collective progress.

PIC Summit Europe provides a structured, annual platform that unites the whole value chain—linking researchers, entrepreneurs, corporates, and policymakers. It transforms fragmented efforts into an aligned movement, connecting strategy to action and enabling Europe’s PIC ecosystem to mature and compete globally.



2022
300 ATTENDEES

2025
800 ATTENDEES



STRATEGIC QUESTIONS

1. What are the 12–36-month objectives and the 3–5-year vision for PIC Summit Europe?
2. Which scale and level of impact are you targeting (eg. focused B2B, European flagship, or global platform) to steer design and resourcing?
3. What business model do you mandate—profit center, break-even, or strategic investment—and what budget/ROI guardrails apply?
4. Given the event’s reliance on PhotonDelta’s Tech team for content curation, is this the operating model you want to scale, or should ownership shift?
5. What is the concrete C-level sponsorship for PIC Summit Europe?

SOME NUMBERS

Participants

Overall score	4,56/5
Program	4,59/5
Meet stakeholders	4,25/5
Venue	4,36/5
Communications	4,6/5

Partners

Overall score	4,53/5
Program	4,53/5
Meet stakeholders	4,46/5
Number of participants	4,63/5

