



The Flexible Electronics Opportunity

Committee on Best Practice in National Innovation Programs from Flexible Electronics, National Research Council

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Flexible electronics describes circuits that can bend and stretch, enabling significant versatility in applications and the prospect of low-cost manufacturing processes. They represent an important technological advance, in terms of their performance characteristics and potential range of applications, ranging from medical care, packaging, lighting and signage, consumer electronics and alternative energy (especially solar energy.) What these technologies have in common is a dependence on efficient manufacturing that currently requires improved technology, processes, tooling, and materials, as well as ongoing research. Seeking to capture the global market opportunity in flexible electronics, major U.S. competitors have initiated dedicated programs that are large in scope and supported with significant government funding to develop and acquire these new technologies, refine them, and ultimately manufacture them within their national borders. These national and regional investments are significantly larger than U.S. investment and more weighted toward later stage applied research and development.

The Flexible Electronics Opportunity examines and compares selected innovation programs both foreign and domestic, and their potential to advance the production of flexible electronics technology in the United States. This report reviews the goals, concept, structure, operation, funding levels, and evaluation of foreign programs similar to major U.S. programs, e.g., innovation awards, S&T parks, and consortia. The report describes the transition of flexible electronics research into products and to makes recommendations to improve and to develop U.S. programs. Through an examination of the role of research consortia around the world to advance flexible electronics technology, the report makes recommendations for steps that the U.S. might consider to develop a robust industry in the United States.

Significant U.S. expansion in the market for flexible electronics technologies is not likely to occur in the absence of mechanisms to address investment risks, the sharing of intellectual property, and the diverse technology requirements associated with developing and manufacturing flexible electronics technologies. *The Flexible Electronics Opportunity* makes recommendations for collaboration among industry, universities, and government to achieve the critical levels of investment and the acceleration of new technology development that are needed to catalyze a vibrant flexible electronics industry.

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