



Excellence in All Categories

*Epson's New Flagship Range
Breaks New Ground in the
High End Pro-AV Segment*



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Business
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EPSON[®]
EXCEED YOUR VISION

The Repositioning of a Japanese Giant



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Editor-in-chief
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Australian-born, Richard Barnes has been working in various media since the late 70's. In 2000, he took on the position of Editor-in-chief at Cleverdis, responsible for overseeing the content of all international publications as well as SPECIALreports and other corporate publishing activities. He is recognised widely throughout the industry for his knowledge and foresight concerning the Display industry, and to this end is often called upon to speak at international events (IFA International Press Conference, Equip'Hotel Paris, IHTF, etc).

As always, Cleverdis is working as your "radar", scanning the market for upcoming movements that will affect your business. In this case, we believe there will be a major impact from Epson's decision to further expand its projector range boldly into the Installation Pro-AV market, with the launch in 2008 of the EB-G5000 series, and now, with the release of a high-powered ultra fine resolution (WUXGA) flagship model: the EB-Z8000 WU (employing inorganic LCD panels). This move is important not so much from the point of view that a new player is entering the installation Pro-AV market, but from the fact that the company doing so is Epson. Already number one worldwide in the projector market in general, Epson's strengths had, until last year, primarily been in the fields of

corporate, small business, education and home entertainment. The introduction of the EB-G5000 series has created a splash, as AV installers found new solutions such as multi-projection installations that until then had been financially unviable. To this end, we present in this SPECIALreport, an example of a new installation using this series. With dual lamp technology and up to 7,000 lumens brightness, the introduction of the EB-Z8000 series will, we believe create a number of new opportunities for installers in the installation Pro-AV segment, due to Epson's specific positioning of this model which has a number of new, unique features. In addition, Epson is underlining its dedication to the development of stronger Pro-AV channel support. Read on to find out more...

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By Gérard Lefebvre, Publisher

Exceed Your Vision

A Word of Introduction from Mr Koichi Kubota, Chief Executive,
Visual Instruments Operations Division,
Seiko Epson Corporation

In the world today, Epson projectors are chosen by around three times more people than those of our nearest competitors. Indeed, since 2001, we have remained in the dominant position worldwide, and at time of writing, latest research by Futuresource gave Epson 22.4% of the worldwide market share.

I think there is a variety of reasons for our ongoing success: our comprehensive product line-up, a true “earth conscious” policy across the board, production reliability (we have been producing 3LCD chips and projectors for 20 years in our own factories), highly advanced technologies, an extremely solid sales and support network in all zones, and above all, a true spirit of market development.

When it comes to our spirit of market development, you may recall that Epson has invented many unique technologies, including of course 3LCD, but also many other products. But that is not all. Another key point in our projector business development

is our serious effort to understand and offer true benefits for customers in each segment that may not be found in the product data sheets. We believe that you will find this spirit in many different aspects, such as reliability, ease-of-use, aesthetic design, our support programme and, of course, basic quality and performance, in our new EB-Z8000 series. The ease of handling and installation will make this series a true favourite among integrators. In addition, ease of use by end users will create a major “pull” effect.

In this SPECIALreport, I invite you to discover this exceptional new range and to learn more about why I believe Epson is destined to be outright leader in ALL projection categories, thanks to our stronger positioning in the high brightness installation category.

Having said that, let me stress that we are still at the beginning stage in our efforts in this category. We would like to continue improving ourselves by learning from our customers and partners.



Mr Koichi Kubota
Chief Executive
Visual Instruments Operations
Division, Seiko Epson Corporation

Mr Koichi Kubota is currently Chief Executive of the Visual Instruments Operations Division. Having joined Seiko Epson in 1983, he worked for various departments, moving to the Projector Business Unit as General Manager for Global Marketing and contributing in a period of five years to increasing global market share from 13% to over 20%.



Market Analysis

ROI* More Important Than Ever – Futuresource Upbeat on High End Projection Sector

The projector market has traditionally been a double-digit growth industry; however, the recent economic upheaval is expected to reduce the overall market to stagnant volume growth in 2009 as many corporate installation upgrades are delayed. One specific industry bright spot however has been the continued growth and innovation in the 'high end market', which is offering excellent margin/value opportunities for channels and vendors alike.



Mike Fisher
Head of IT & Professional
Futuresource

Mike has been with Futuresource Consulting for almost ten years, in this time primarily focusing on the b2b display industry. Mike's specific expertise focuses on the areas of digital signage, IT in education, and channel segmentation, and he is recognised as an international authority in this space.

In the current economic context, high-end, or high-brightness professional projectors (defined as projectors from 5000 Lumens) are progressively penetrating a wide range of vertical markets with High Definition content, a key driver to project development. With product requirements extremely different by vertical market, product ranges are increasingly being developed and marketed with specific usage in mind. Specific feature sets such as lamp cooling and dual lamps and the introduction of 3D capable projectors are all combining to make projection technology more suitable in advanced usage scenarios. With continued product innovation and increasing penetration of new markets, the high-end segment is expected to offer an excellent volume and value opportunity for resellers, even during difficult economic times.

"The high-end segment is expected to offer an excellent volume and value opportunity for resellers, even during difficult economic times."

More and more vendors are starting to appear in the large venue scene, all seeking to tap into great margin opportunities involved with the high-end projection market. Compared to 2007, the number of manufacturers with 5000+ lumen projectors has grown significantly.

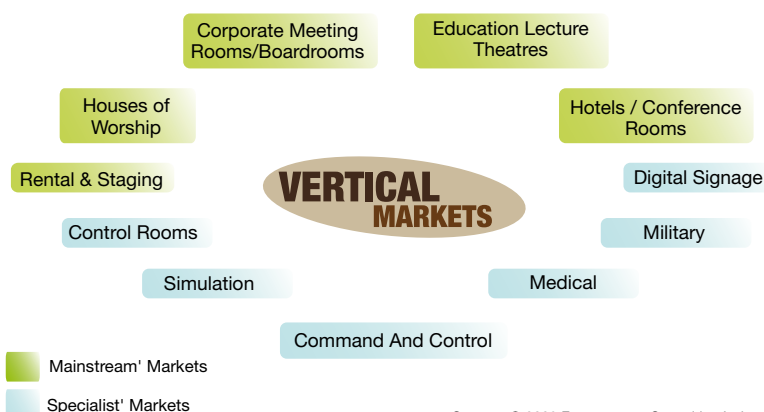
Albeit many of the new entrants will mainly be playing in the lower end of the spectrum since they lack the market specialism and expertise compared against the top players, this still represents massive volume growth potential.

2007 to 2008 saw an impressive 53.8% Year on Year volume growth in the large venue category, with another 26.1% growth expected this year to reach 150k units worldwide in 2009. Besides key countries such as the U.S., Korea and

Germany contributing to a high proportion of volume in the large venue segment, the emerging countries across the world continue to boast the greatest growth potential. Completely new install opportunities in previously unexploited vertical markets will be in abundance, especially among the likes of Russia, China and India. This is where we see the majority of the new entrants attack the market, offering more price aggressive solutions for the high-end.

A key characteristic the majority of emerging markets share is an under-developed channel structure for high-end projection. This will also work in favour for newcomers as it provides a perfect platform for them to build up relations with AV channel specialists / System Integrators and potentially mould the channel landscape for a given country. This route to market is likely to be crucial for new entrants moving forward.

Vertical Markets For High End Projectors



The Forward March of 3LCD

Smaller, Finer, Better...

Epson's TFT Micro-displays Never Cease to Improve

As the inventor of the 3LCD chipset a full 20 years ago (Epson is celebrating its 20th anniversary of the first LCD-based projectors) and at the forefront of development of this technology, Epson's engineers don't rest on their laurels, which is perhaps why 3LCD still dominates the market.

Epson's strength in the market comes from this undisputedly solid background. With 50-million 3-chip engines sold to date (and climbing fast), main selling points include lower power consumption, less heat output, high colour light output and the lack of a spinning colour wheel inside the projector. When explaining 3LCD technology to end users, there are three key terms: BRIGHT, thanks to excellent colour reproduction; NATURAL, thanks to smooth gradation; and EASY ON THE EYES, because there is no colour break-up.

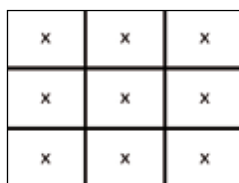
Colour Light Output The Important Metric

Current brightness specifications only measure the maximum level of WHITE (expressed as lumens according to ISO 2118 standard). However when one thinks about it, projectors hardly ever project just black and white, but in fact

project above all colour images. In-depth market research by TFC Associates, a leading projector market research firm, clearly shows that picture quality is the most important factor when choosing a projector. Colour Light Output is thus critically important because colour is a key indicator of picture quality. This has led the 3LCD division to underline a new metric called "colour light output" (CLO), which determines the ability of a projector to deliver true, brilliant colours.

Developed by Lumita (www.lumita.com) in the US in December 2007 using the same approach as white light output (brightness) measurement, Colour Light Output provides a simple, accurate and easy-to-understand way to evaluate a projector's colour performance. This concept of Colour Light Output gives users a more accurate picture of their projector's performance.

How is Colour Light Output measured?



Brightness (or White Light Output) measures the total amount of white light projected in lumens on a nine point grid. It does not measure colour.



Colour Light Output uses 3 sets of a nine point grid to measure the primary Colours - red, green and blue, using the same approach used to measure White Light Output in lumens

Inorganic LCD Panels = Improved Reliability



For the new Flagship models, C²Fine technology is used in a newly developed LCD panel, which is based on inorganic alignment layer and vertical alignment technology. The inorganic alignment layer has higher light-resistance. In addition, newly developed higher light-resistant liquid crystal elements lead to the improved reliability of the C²Fine Panel of the Z8000 series.

Applications and Advantages of WUXGA

WUXGA (1920 X 1200) high resolution is ideal for professional applications such as finance, medical care, patent office, CAD and HD editing. Users are able to display more content with WUXGA Super-High resolution. The WUXGA resolution display more content while providing crisp images and highly legible text without image distortion or scaling. In addition, the high-resolution wide screen allows you to view two independent A4-sized windows side by side at the same time and HDTV and HD video at its native 1920 x 1080 pixels with pixel qualities that surpass even that of 1080.

- More data on the screen at the same time
- Less scrolling and toggling between windows
- More room for applications, tool bars, pull down menus etc without overlapping
- Two side-by-side pages of text or graphics can be shown at the same time.

The Groundbreaker

Epson's EB-Z8000 Series – the New Flagship

The exciting new installation series by Epson is breaking new ground in more ways than one.

We asked Yasunori Ogawa, General Manager, Planning & Design Department, Seiko Epson Corporation and Akihiro Ozasa, Product Marketing Manager, Seiko Epson Corporation about its main features ...

What were the biggest challenges in developing this product?

Yasunori Ogawa: The most difficult issue we had in developing this product was to achieve such high light output as well as having enough cooling to secure long product life. Using the dual lamp system to achieve up to 7,000 lumens, and achieving low noise and high durability... these were the biggest challenges. We have also worked very hard on achieving excellent picture quality.

What are the main selling points of the EB-Z8000?

Akihiro Ozasa: This series has several major selling points that will greatly differentiate it from the rest of the field: these projectors produce excellent image quality, have an aesthetic design, and are easy-to-install, not to mention their enhanced reliability.

Y.O.: The laptops and LCD monitors are strongly tending towards WUXGA (1920 x 1200), and the projector market is now also set to do this, which is why we wanted to be the first in the market to have this resolution. This is the first WUXGA 3LCD unit

to be produced. Epson has exclusivity as the only 3LCD player to have this resolution. In marketing terms, this unit will thus be placed in competition against high-bright single-chip and three-chip DLP products as well as LCOS units. In terms of value for money, it will thus create a new niche in this sector.

What makes the image quality so good?

A.O.: A newly developed WUXGA optical engine developed and manufactured by Epson's TFT division, featuring inorganic LCD panels with C²Fine technology, generates up to 7,000 lumens Light Output, thanks to a dual lamp system. This new optical engine delivers a contrast ratio of 5,000:1 (dynamic), ensuring the projection of crisp and sharp wide images even in large, bright spaces such as conference rooms, lecture halls and entrance halls. The C²Fine 3LCD micro-displays use vertical alignment meaning high contrast and "pure black", smooth images. These beautiful images are made even smoother thanks to the development, also on the 3LCD chips themselves, of inor-





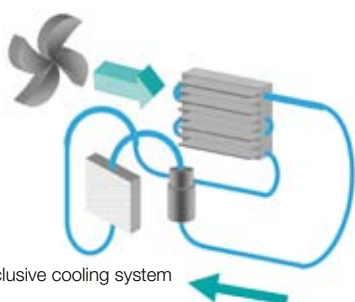
ganic alignment layers. Digital Cinema Colour is assured using a redesigned Epson Cinema Filter.

Maintenance and reliability can often be an issue. How does Epson get around this?

A.O.: The new C²Fine LCD micro displays have much better life expectancy, as they are based on an inorganic alignment layer along with other new liquid crystal elements, resulting in improved light-resistance. Other optical parts are also built for longer life. Through the simultaneous utilisation of two new high wattage lamps, the risk of “blackout” is eliminated, as if one lamp fails accidentally, the operation can be continued with the other. Not only that, these lamps are also much more reliable! The EB-Z8000 series is thus designed for heavy-duty usage. Thanks to our revolutionary and unique new cooling system, the longevity of the unit is also assured.

Could you please tell us more about this exclusive cooling system?

Y.O.: The system is based on liquid, peltier and air cooling technology. The liquid-based part of the system cools the LCD panels. After this, the liquid is cooled by a peltier device, which in turn is air-cooled by a fan. The result is high reliability, stable operation in ambient temperatures of up to 45°C while still operating extremely quietly. In addition, we have



Epson's exclusive cooling system

a unique mechanical cooling technique for the lamps.

What about access to the filter and lamps? Is this easy?

Y.O.: Absolutely. They are easily accessible and replaceable without any tool even if the projector is mounted to the ceiling. In addition, the newly developed large area pleated filter (which is electrostatic) allows operation up to 10,000 hours before requiring filter replacement under normal conditions.

What features make the EB-Z8000 particularly interesting for installers?

A.O.: We visited numerous AV dealers and installers worldwide – in the US, Europe and Asia, and what we found was that their biggest need -- the biggest selling point for them -- is the minimising of work for installers, because of the size and weight of installation projectors. Based on that feedback, we designed the casing for the projector. The most unique thing is that there are two big handles on top of the projector and this makes it very easy to install. In addition, you don't have to turn the projector upside down to mount it on the ceiling, and that's unique in the market. The symmetrical design accentuates the centred lens. It is appreciated not only for its ease of installation, but also from the design point of view. When mounted to the ceiling the white and thin-look body goes well with its surroundings such as ceilings and walls in the large meeting rooms or the lecture halls and lightens its presence. There are many features that make it highly suited for innovative and vertical applications, including the EasyMP™ wireless function, motorised flexible lens shift, optional lenses and the possibility to project vertically, onto the ceiling or the floor, without any cooling issues.



Yasunori Ogawa
General Manager
Planning & Design Department
Seiko Epson Corporation



Akihiro Ozasa
Product Marketing Manager
Seiko Epson Corporation



A wide choice of optional lenses

Adding New Value for European Pro-AV Installers

Face to Face with Epson's EMEA Product Manager Business Projectors, Vincent van Rij



Vincent van Rij
EMEA Product Manager
Business Projectors
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The Franco-Dutch Vincent Van Rij joined Epson in 2007 in charge of marketing of video projectors in the EMEA area. Prior to his work with Epson he was working for a major European Consumer Electronics brand marketing flat TVs. He graduated with a Masters in Marketing Research and Strategy (Sciences Po Paris) in 2006, after having obtained a Masters in Management Sciences at the University of Paris Dauphine in 2004 and a BSc in Management at the Manchester School of Management in 2003.

To gain a firm insight into Epson's "secret" in remaining number one in the European projector market, and how they will be developing key partnerships in the High-End Pro AV sector, we met with Epson's EMEA Product Manager Business Projectors, Vincent Van Rij, in Paris and took some time out to tour the new "European Projection Centre (EPC)".

Tell us about Epson's position in the European projection market...

In the last quarter of 2008, Epson reached 20.3% market share in EMEA area (Europe, Middle-East, Africa) according to Futuresource. We have been the number one seller on the projector market since 2003 in this region. This shows stability and a long term relationship with our customers. We launched our TFT LCD projector production in 1989 so we have a strong history in this market. We are vertically integrated for all production and development, from the LCD chipset right up to the final product. What's more, we are controlling all the costs so this means production reliability. This has helped bring in a lot of educational tenders for us. Since we're not selling any other AV products, it means that our sales team is focusing on projectors and are experts on them. Our success in the market is also

due to our very strong pre and post sales support for our channel partners.

How do you plan to expand your relationships with AV Channel Partners in Europe?

The EB-Z8000 series is an innovative range, perfectly suited to the needs of this channel. Together with our EB-G5000 series launched in June 2008, we now have an ideal product portfolio to fully expand in the pro-AV area where we have lacked some focus. Of course, this will not happen in a couple of months. Our objective is to develop long-term relationships with selected partners to grow in a successful and sustainable way. This means implementing specific reseller programmes in all areas in order to create direct relationships with each of them. We will protect these partners when they enter a project, provide technical support on site, and introduce our technical experts when required. Our partners will be provided clear technical information on our products and services with a dedicated Epson contact in each territory. We will also be working intensely with them to gather product feedback and develop a solid roadmap that is a win-win situation!

"All this, we believe will help installers understand that working with Epson pays off in many ways."

Tell us about your approach on pre sales support...

In particular, with the launch of new products in the high-end Pro AV sector it's important to help our partners in their daily contacts with end-users. Customer demonstrations are essential, because seeing is believing. Therefore, free loan demo units will be available for selected AV resellers in order



Jocelyn Jolivet
Repair and
Reburishment
Manager -
examines the
workings
of a 3LCD
projector



for them to explain all the features to potential clients. We believe that the provision of free demo units will considerably help resellers in these difficult economic times.

A major factor that will help European channel will be the launch in June 2009 of your Pro AV website. Could you tell us about this?

The website (www.epson-europe.com/ProVideo) will include information on all installation products, such as RS-232 control codes for connectivity with other devices; detailed product specifications and CAD/CAM drawings; and useful advice for easy maintenance. Installers will also benefit from a new Projection Distance Calculator. We believe it is the best calculator of its kind on the market, including lens shift, all aspect ratios, connections and pictures of the product displayed, optional lenses, desktop/ceiling mounted position, with a customisable & printable, user friendly interface! All this, we believe will help installers understand that working with Epson pays off in many ways.

How do you plan to help in post sales support?

We will be offering special warranty programmes which we believe will be of great assistance in selling these units! We also studied internally the success in the Large Format Printer (LFP) business: a limited number of resellers with direct contacts, a high level of training and product knowledge, with the possibility of simple on-site repair on behalf of Epson. We believe this is the direction to follow for the best customer satisfaction and long-term loyalty.

www.epson-europe.com/proAVPremium

The European Projection Center – Underlining Epson’s Dedication to Partner Support

At the end of 2008, a service centre at Créteil on the outskirts of Paris, France, was extended to create a unique and modern training and demonstration centre for Epson’s video projectors: the European Projection Center (EPC). Penetrating into the modern centre, off the main corridor to the left, through a glass presentation wall, we get a glimpse of the EasyMP™ Business Meeting Room and Flexible Demo Room, while to the right, there are two doors. The first leads to the Home Cinema Dark Room, and the second to the Interactive Classroom. In this centre, Epson has developed a multifunctional, dedicated, and custom-designed space for the use, testing, and demonstration of video projectors, facilitating product demonstrations, competitor shoot-outs and partnership promotions. The centre is the base for European product meetings, sales and technical training for Epson personnel, and demonstration days for customers, journalists, partners and end users. According to Mr van Rij, the EPC underlines the applications rather than just projectors: “We do not just

demonstrate Epson projectors, but also solutions around projectors.”

EasyMP™ Business Meeting Room:

In this zone, Epson’s multi-screen technology is demonstrated, including Epson’s EasyMP™ features (networking, multiscreen wireless, PC Free & Quick Wireless Connection). The area is set-up as a meeting room and includes a tailor-made Oray motorised wide-screen for multi-screen demonstration, thanks to 3 ceiling-mounted EB-G5350 projectors, employing EasyMP™ software to present ultra wide screen presentations from one single PC without cables.

The Clean Room: Next to the EPC, we find Epson’s main European repair centre for business products, giving a “selected

few” the chance to get a close-up view of how projectors are repaired and maintained, and also enabling them to see the internal workings of these high-tech units. At the repair centre, high precision equipment is used to re-set optics and 3LCD chipsets that may have been damaged or broken. Observers can thus watch highly skilled Epson technicians at work, and gain a much better understanding of the importance of the company’s dedication to after sales service.



Bold Images in the Belgian Night

Colour and light is added to the drive home, thanks to an innovative project powered by Epson projectors



After sunset and before sunrise, alongside one of Europe's busiest motorways in the heart of Belgium, drivers' eyes are drawn by a novel sight: a spectacular, dynamic and colourful 15 x 4 metre "image tower" atop one of the nation's most modern printing works.

The idea of "de PRESS" owner, Jonny Janssens, has been brought to life thanks to an innovative and highly cost efficient solution made possible by Epson technology. "Being a printing company, we wanted people to see that we made nice things and we wanted people to see that our operation was very modern," said Mr Janssens... Thus, the slogan, "The Graphic House of the Future". But after originally coming up with the idea as the building was being completed in 2007, Mr Janssens discovered that the installation would cost a lot more than he was ready to pay using the solutions that were available at that time. The challenge was thus to find a way of creating an installation resulting in a stunning 15 x 4 metre image wall without breaking the bank with overpriced solutions.

Renowned AV installer AVSTUDIO finally found the answer at the end of 2008, in the form of Epson's new EB G5000 series projectors (among the brightest in the industry), along with Easy MP software*. "When Jonny contacted us we instantly thought of Epson projectors," said Tim van Gasse of AVSTUDIO. "He needed four projectors, plus software and we had the opportunity to solve this problem thanks to Epson's built-in technology and software, which is unique in the market, at a price

that was right for this project, because the software package was included!"

The software included with the projectors allowed perfectly for the type of application desired. "Software for edge blending is expensive, and can be useful when you are in a meeting room or auditorium", said Mr van Gasse. "The blending has to be perfect because you are just a few metres away and are looking at it all day, whereas in this particular case it was enough that the images be close to one another. We also realised that if we had used edge blending, the images and projectors would have had to

be adjusted every day, because the building moves a little bit all the time!"

The visual result of the installation is exceptional, and the creativity of the owner in thinking-up new campaigns adds a great deal of spice to the recipe. Two types of content can be seen – messages of "general interest" or "fun", and advertising – both for the printers themselves and for their clients as well.

More information:
www.avstudio.be / www.depress.be



Into the High Brightness Installation Market

by Gérard Lefebvre

Epson this year announced the 20th anniversary of its 3LCD projector technology, marking two decades of innovation since the first 3LCD projector, the VPJ-700, was launched in 1989. Back then, this epoch-making 3LCD projector was a truly revolutionary product compared to the tri-tube CRT projectors available on the market at the time and it was greeted with much fanfare. It was the seed of what was to become a new “visual movement”.

Having worked closely with numerous Japanese companies over the past decades, there is one thing we have noted about firms such as Epson: when the wheels of the “big machine” finally get going, they are virtually unstoppable. The determination of Epson’s engineering team over the years along with the fact that their first concern has always been that of working on market feedback, ensured that despite very tough competition, Epson remains today in the

number one position overall in the projector market. The one segment where the competition had felt “sheltered” from Epson however has always been that of high-end installations. The others will now have to contend with the firm will of the market leader to also eventually dominate this segment, giving them “across the board” strength. This decision was not one that was taken lightly by Epson’s senior management, but is one that has been years in development, and is part of a long-term plan.

Entering the segment without arrogance, but with a desire to meet all the needs of their new channel partners and potential customers, this again is a sign that Epson are going the right way about entering the close-knit high brightness club. No doubt they will be quick to take up a key place in this high end segment as well.



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Gérard Lefebvre Publisher

Gérard Lefebvre has held positions of Director and Chairman with a number of companies in the Display and Digital Peripherals Industry. He is recognised world-wide by industry leaders and the management of major end-user organisations for his work in creating true, efficient and sincere communication between top corporate buyers, specialised channel and top vendors. Gérard currently heads Cleverdis, which he founded in 1997. Gérard is graduated from Ecole Supérieure de Commerce de Paris (ESCP-EAP 1977) with a specialisation in International Finance.

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FIRST CLASS PROJECTION

EPSON EB-G5000 SERIES



- Powerful installations

EPSON EB-S6/X6/W6 SERIES



- High efficiency, great value

EPSON EB-1700 SERIES



- Ultra-mobile flexibility



EPSON
WORLD LEADER
IN PROJECTORS

We've spent 20 years perfecting our 3LCD technology to give you brighter, clearer images that get your message across. It's a key reason why our business projectors have been world-leaders in offices and boardrooms since 2001.

From ultra-lightweight mobiles to permanent installation models, Epson business projectors combine superb quality with versatile features giving you total control over your presentations. And you can rest assured that all Epson business projectors deliver reliable performance, cost-efficiency and reduced power consumption.

For more information visit us at www.epson-europe.com

Better Products for a Better Future™

EPSON®
EXCEED YOUR VISION