

EPIC Activity Report 2016







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EPIC Activity Report 2016

>> FOREWORD – EPIC PRESIDENT



t is my pleasure and honour to write this foreword as newly appointed president of EPIC. The association was created in 2003 and had a stable membership since its inception, but in recent years the interest in photonics has grown tremendously. Last year, 74 additional companies decided to join EPIC, now representing 295 companies across the entire photonics manufacturing value chain. Together, we advocate and collaborate for the competitiveness of the photonics industry and our members. 4 additional staff were hired to support our members across 28 countries. Complementing the sharing of market reports and organization of numerous events, new services have been added including international delegations and support to access financing.

EPIC is on a mission to build a strong network of trusted experts and leaders. The feedback from those who interact with the association praise the high level of professionalism of the organization and the knowledge of the staff. EPIC is indeed strongly engaged and connected with industry, last year the staff visited 96 companies getting to know the competences of the members, discussing their challenges, and engaging them in the 21 workshops and events organized in 2016. EPIC staff were invited to actively participate in 21 events and they attended 28 events. Clearly, I am proud to be part of such an active organization, that acts on behalf of all of us for the competitiveness of the photonics industry.

Benno Oderkerk, CEO, Avantes

MEET THE STAFF from left to right:

- Ana Gonzalez, PhD, Project Leader
- Carmen Ferrari, CMP, Events and Marketing Manager
- Carlos Lee, MBA, Director General
- Anna Feis, MSc, CFO and Photonics Investment Advisor
- Jose Pozo, PhD, Director of Technology and Innovation



EPIC, nominated Finalist for the European Association Leadership Award 2017



FINALIST Association Leadership Award

WHAT IS EPIC?

EPIC – European Photonics Industry Consortium – is an industry association whose focus is to promote the sustainable development of organisations working in the field of photonics. We foster a vibrant photonics ecosystem by maintaining a strong network and acting as a catalyst and facilitator for technological and commercial advancement. EPIC publishes market and technology reports, organizes technical workshops and B2B roundtables, takes part in advocacy and lobbying, promotes education and training activities, sets standards and roadmaps, and hosts pavilions at exhibitions.

EPIC IS OWNED BY ITS MEMBERS AND MANAGED BY ITS BOARD OF DIRECTORS

- Benno Oderkerk, CEO, Avantes (The Netherlands)
- Bruno Mourey, CTO, CEA-Leti (France)
- Drew Nelson, President & CEO, IQE (United Kingdom)
- Heinz Seyringer, Head of Research Collaborations, Zumtobel Lighting (Austria)
- Jan Meise, CEO, AMS Technologies (Germany)
- Kurt Weingarten, General Manager, Lumentum (Switzerland)
- Martin Schell, Director, Fraunhofer HHI (Germany)
- Petteri Uusimaa, President & CEO, Modulight (Finland)



EPIC Board of Directors meeting at Avantes in Apeldoorn



EPIC Board of Directors meeting at Modulight in Tampere

EPIC APPOINTS NEW BOARD MEMBER

Jan Meise, CEO of AMS Technologies, joined the board of directors on 30 September 2016. Jan adds to the board his expertise in the Photonics ecosystem and value chain models coupled with the need for Photonics cooling in medical and industrial applications and his experience as an entrepreneur. Jan joined AMS Technologies in 2010. Prior to joining AMS Technologies, he was the Director of Strategic Marketing for Finisar, a US based company offering optical transceivers for the data and telecommunication industry. Jan holds a MSc equivalent degree in electrical engineering from the Technical University of Braunschweig, Germany.

MEMBERSHIP FEE

- Company with annual revenue above 100 million EUR: 6000 EUR
- Company with annual revenue between 10-100 million EUR: 4000 EUR
- Company with annual revenue below 10 million EUR: 2000 EUR
- Start-up (company less than 5 years old): 500/1000/1500/2000 EUR
- University or Research Organization: 2000 EUR
- Association or Cluster: 2000 EUR



With a strong focus on Photonics as a key enabling technology, Europe will play a leading role transforming the Photonics industry from its current fragmentation into adopting business models more closely aligned to those of the electronics industry. I see EPIC providing that collaboration platform to shape and define the future Photonics value chain".

Jan Meise, CEO, AMS Technologies

ON STAGE

EPIC is frequently invited to join committees, boards, and speak at events in Europe and around the world. Also contributing to company strategy meetings is mutually interesting and stimulating.

- 1. Chair PIC Conference in Brussels
- 2. Chair 32nd European Mask and Lithography Conference session in Dresden
- 3. Chair IoT conference session in Eindhoven
- 4. Chair session on "Skilling up for the Future of Europe: STEAMing ahead through Digital and Key Enabling Technologies" in The Hague
- 5. Chair ISA General Assembly in Beijing
- 6. Keynote at Lasers: Science and Technologies in Bebrusai
- 7. Keynote at Innovation 360 in Montréal
- Keynote at AMS Technologies Annual Meeting in Schladming
- 9. Keynote at Sensofar Incubation Camp in Barcelona
- 10. Moderate From Idea to Packaging at 2nd Photonic Integration Conference in Eindhoven
- 11. Moderate Future Photonics Hub Industry Day in Southampton
- 12. Moderate Photonics Entrepreneurship Day in Berlin
- 13. Moderate B2Health Business & Networking event in Marseilles
- 14. Moderate Intelligent Efficient Solid-State Lighting Workshop in Muttenz
- 15. Presentation at Institut d'Optique Graduate School in Palaiseau
- **16.** Presentation at High-Tech Forum in Torbay
- 17. Presentation at ASD UK in Birmingham
- 18. Presentation at European Defence Agency CapTech meeting in Rome
- 19. Presentation at UCL-Cambridge CDT in Integrated Photonic & Electronic Systems Industry Day in London
- 20. Presentation at Bidding and Decision Making of International Congresses in Brussels
- Presentation at European Association Summit in Brussels



Photonics Hub in Southampton

UCL Industry Day in London

IOGS in Palaiseau



EXHIBITING & ATTENDING INDUSTRY EVENTS

- 1. 2nd Photonic Integration Conference in Eindhoven
- 2. 3rd Printing Revolution and the Dental Sector in Brussels
- 3. 7th Intelligent Sensors Network Conference in Eindhoven
- 4. 8th ISA Executive Member Meeting in Beijing
- 5. AKL in Aachen
- 6. Closing Ceremony of the International Year of Light in Mexico
- ECOC in Düsseldorf
- 8. EuroBlech in Hannover
- 9. FinTech Investment Summit in Paris
- 10. FISC & DISC conference in Dresden
- 11. LACSEA (Laser Applications to Chemical, Security and Environmental Analysis) in Heidelberg
- 12. Lasers and Photonics Marketplace in San Francisco
- 13. LpS in Bregenz
- 14. Medica in Düsseldorf
- 15. micro photonics in Berlin
- 16. MicroNanoConference in Amsterdam
- 17. Optatec in Frankfurt
- 18. OPTRO in Paris
- **19.** Photonic Event in Veldhoven
- 20. Photonics Europe in Brussels
- 21. Photonics21 annual meeting in Brussels
- **22.** PIC conference in Brussels
- 23. Precisie Beurs in Eindhoven
- 24. Presentation of the International Year of Light Final Report in Paris
- 25. Quarterly progress meeting Optical Image Guided Surgery in Rotterdam
- 26. Robotics and Photonics for Healthcare in Eindhoven
- 27. Sensor Payload Workshop for small UAV organized by European Defence Agency in Brussels
- 28. Vision in Stuttgart



Medica

in Düsseldorf











International Year of Light Closing Ceremony in Mexico



Promotion at micro photonics of 201 job openings at EPIC member companies



"EPIC is a useful organization for developing my network and learning about the latest developments in my field through direct insight from key industry players."

Mirvais Yousefi, Principal Engineer Photonics Applications, Huawei European Research Center



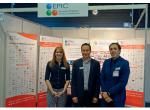
ECOC in Düsseldorf



ASD Days in London



FISC DISC in Dresden



Photonics Event in Eindhoven

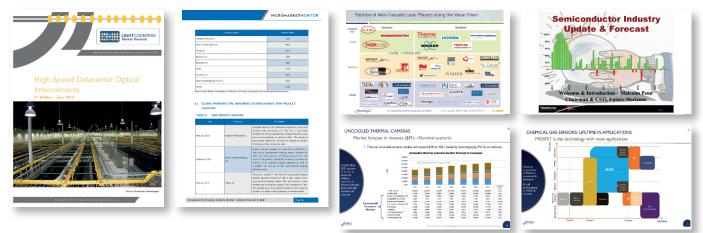


Bidding and Decision Making of Congresses in Brussels

MARKET REPORTS

Every employee of a company member of EPIC has free access to the EPIC library on the extranet. The extranet is simple to use and you can conveniently download hundreds of technology presentations and numerous market reports.

- 2016 UV LEDs Technology, Manufacturing and Application Trends published by Yole (360 slides, nonmember retail price 6490 EUR)
- 2016 Uncooled Infrared Imaging Technology and Market Trends published by Yole (237 slides, nonmember retail price 6490 EUR)
- 2016 Mid-Term Semiconductor Industry Update & Forecast published by FutureHorizons (136 slides)
- 2016 Hyperspectral Imaging Systems Market Global Forecast to 2021 covering applications in Aerospace & Defense Surveillance, Remote Sensing, Machine Vision & Optical Sorting, Life Sciences & Medical Diagnostics... (123 pages, non-member retail price 5650 US\$)
- 2015 Ultrafast Laser Report: Trends and Five-Year Forecast published by Strategies Unlimited. This report covers the evolution of these lasers, loosely defined in this report as lasers that can produce pulse durations of 15 picoseconds or less. (90 pages, non-member retail price 4000 US\$)
- 2015 Sensors for Wearable Electronics and Mobile HealthCare published by Yole (294 slides, non-member retail price 5990 EUR)
- 2015 Photonics Technologies for ADAS in the Automotive (Advanced Driver Assistance Systems). Published by TEMATYS (204 slides, non-member retail price 4990 EUR)
- 2015 New Technologies & Architectures for Efficient Data Centers published by Yole (217 slides, nonmember retail price 5990 EUR)
- 2015 Hyperspectral Imaging Global Forecast to 2019 markets by application: military & surveillance, environmental testing, mining & mineralogy, agriculture, machine control & process vision, life sciences & medical diagnostics, food, colorimetry, meteorology) published by MarketsandMarkets (81 pages, non-member retail price 4650 US\$)
- 2015 High-Speed Datacenter Optical Interconnects published by LightCounting (230 pages)
- 2015 Cascade Laser Technology Components & Systems Technology and Market Trends published by TEMATYS (248 slides, non-member retail price 3990 EUR)





***** "At EPIC workshops I meet customers and early adopters in the marketplace in order to gain insight into application requirements, technology trends, and business trends."

Marco Koelink, Business Development Manager, Advanced Packaging Center

>> TECHNOLOGY WORKSHOPS & BUSINESS EVENTS

EPIC strengthens the connections among its members by creating fora to meet, to discuss challenges and opportunities, and to explore collaboration possibilities. EPIC events are typically on-invitation to ensure a relevant audience, and limited in size to ensure effective networking. EPIC members drive the agenda and have registration priority at all association events.

- 1. Annual General Meeting in Zurich
- **2.** B2B Roundtable on Active Imaging, Hyperspectral, Improved Degraded Visual Environment for Defence and Security applications in conjunction with OPTRO in Paris
- 3. Co-organizer of the 2nd European Photonics Venture Forum in Eindhoven
- 4. DAY OF PHOTONICS
- 5. Entrepreneurship Workshop with Frank Levinson, Founder of Finisar, in Eindhoven
- 6. EU-Asia Laser Industry Summit in Shenzhen



Defence and Security Applications in Paris (hosted by OPTRO)



Entrepreneurship Workshop with Frank Levinson in Eindhoven (hosted by Photonics Event)



EPIC Annual General Meeting in Zurich (hosted by Swissphotonics)



European Photonics Venture Forum in Eindhoven



EU-Asia Executive Laser Summit in Shenzhen



Laser Material Processing in Vilnius (hosted by Altechna and Light Conversion)



IP Workshop in Coventry and Berlin



Photonics in Consumer Electronics in Cambridge (hosted by Cambridge Consultants)



Lighting for Horticulture in Bregenz (hosted by LpS)

- 7. Executive Meeting on Lasers and Material Processing in Vilnius
- 8. HealthTech event on Photonic Systems for Life Sciences Applications in Cork
- 9. IP Workshop in Berlin & IP Workshop in Coventry
- 10. Session at SEMICON Europa on Silicon Photonics in Grenoble
- **11.** Session at ELMC in Dresden
- 12. Tech Watch Forum in Berlin
- 13. Workshop Lighting in Horticulture in Bregenz
- 14. Workshop Optical Fiber Sensors for Structural Health Monitoring in Lannion
- 15. Workshop Photonics & Opto-Electronics Packaging in Edinburgh
- 16. Workshop Photonics for Consumer Electronics in Cambridge
- 17. Workshop Translating Biophotonics Technologies to Clinical Oncology: Perspectives & Challenges in Paris



AMS Technology Day in Schladming





Photonic Systems for Life Sciences Applications in Cork (hosted by Tyndall)

Translating Biophotonics Technologies to Clinical Oncology in Paris (hosted by Gustave Roussy Hospital)



Tech Watch Forum in Berlin (hosted by micro photonics)



Optical Fiber Sensors for Structural Health Monitoring in Lannion (hosted by iXBlue and Photonics Bretagne)



Photonics & Opto-Electronics Packaging in Edinburgh (hosted by Heriot-Watt University)



* "EPIC events are always consistently well organized. Attending there is a remarkably efficient way to get to know better interesting people dealing with photons as we do, too. Often mutual business opportunities emerge from these face to face contacts - making it a good ROI of my time."

Thomas Laurent, CTO, eagleyard Photonics

NETWORKING EVENTS – BUILDING A TRUSTED COMMUNITY

EPIC provides unrivalled networking opportunities among its members, customers, and VIPs from the photonics industry. This way companies get to know each other better, and people build a long lasting trustful relationship. When we know each other better, we work better together. Typically, EPIC networking events are free to attend but on invitation.

- 1. Networking Breakfast in Anaheim, Berlin, Zurich
- 2. Networking Dinner in Apeldoorn, Brussels, Edinburgh, Lithuania, Munich, Stockholm
- 3. Networking VIP Party @ ECOC in Duesseldorf
- 4. Jogging in San Francisco, Vilnius, Zurich
- 5. Company visits to Altechna, BOD Group, Cambridge Consultants, Ekspla, Gustave Roussy Hospital, iXBlue, Kaiam, Light Conversion, Tyndall, Workshop of Photonics, Zumtobel











Breakfast at OFC in Anaheim



Company visit Gustave Roussy

in Paris



Company visit Zumtobel

in Dornbirn

Dinner EPIC Board of Directors

in Apeldoorn



Company visit Ekspla in Vilnius



npany visit Light Conversion in Vilnius



Company visit iXBlue in Lannion



Dinner in Stockholm



in Düsseldorf

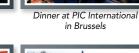
Company visit Workshop of

Photonics in Vilnius



Dinner with entrepreneur Frank Levinson, Founder of Finisar







Jogging in Vilnius



Company Visit Altechna

in Vilnius

Conference Dinner at the Tour Eiffel in Paris

Dinner

in Munich

Jogging AGM

in Zurich



Company Visit BOD in Vilnius



Dinner at Photonics Europe in Brussels



in Edinburgh



Jogging 5 Miles at Photonics West in San Francisco



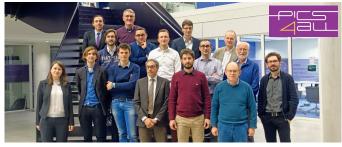
EUROPEAN PROJECTS

EPIC is member of the Photonics21 Board of Stakeholder, regularly attends the meetings, and is involved in key projects as dissemination and exploitation partner.

- 1. EPIC sponsors Photonics21 annual meeting in Brussels
- 2. EPIC attends Photonics21 Board of Stakeholder Meeting in Frankfurt
- 3. EPIC attends Photonics21 WG1 meeting
- 4. EPIC attends Photonics21 WG3 meeting
- 5. EPIC attends Photonics21 WG6 meeting
- 6. EPIC is part of PICS4ALL http://pics4all.jeppix.eu
- 7. EPIC is part of MIRPHAB www.mirphab.eu
- 8. EPIC is part of TERABOARD www.teraboard.eu
- 9. EPIC is part of PIXAPP www.pixapp.eu
- 10. EPIC coordinates the joint dissemination of the EC funded Pilot Lines and Access Centre for the Manufacturing of Photonics: PIXAPP, MIRPHAB, PI-SCALE, PIX4LIFE and ACTPHAST.



Meeting of MIRPHAB -Pilot Line for the manufacturing of Mid-Infrared sensors



Meeting of PICs4ALL - Creation of a European network of Application Support Centres in the field of Photonic Integrated Circuits

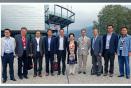
>> INTERNATIONAL NETWORKS & COLLABORATIONS

EPIC is involved in numerous European and international networks. By pursuing our shared interest and fostering growth in the photonics industry, EPIC serves its members in numerous markets and regions:

- 1. Signature of MoU with CSA (China SSL Association)
- 2. Signature of MoU with LUX Consortium from Singapore
- 3. EPIC becomes member of AIM Photonics (American Institute for Manufacturing Integrated Photonics)
- 4. EPIC becomes member of ePIXfab
- 5. EPIC joins the Lithuanian laser delegation in Johannesburg, South Africa



(China SSL Association) in Beijing



Chinese ISA delegation to Bregenz in Austria



LUX Consortium







Appreciation from Lithuanian Laser Association

>> FINANCE, INVESTMENT & ENTREPRENEURSHIP

In January 2016 Anna Feis joined EPIC as Photonics Investment Advisor. With a background as financial controller and in wealth management, Anna facilitates the connection between the investment community and the photonics industry. Her focus is on understanding investor priorities/criteria and matching it with industry opportunities. She holds a BSBA in International Business from the University of Denver and a Master of Science in History from the University of Edinburgh.

- 1. List of Investment in Photonics www.epic-assoc.com/funding/venture-finance
- 2. List of Photonics Mergers & Acquisitions www.epic-assoc.com/message-to-investors
- 3. Co-organizer of the 2nd European Photonics Venture Forum in Eindhoven
- 4. Market Session for investors on Datacentres and Wearables in Eindhoven
- 5. Attend INPHO Venture Summit in Bordeaux
- 6. Attend FinTech Investment Summit in Paris
- 7. Entrepreneurship Workshop with Frank Levinson, Founder of Finisar, in Eindhoven



Anna Feis from EPIC summarizes workshop outcome at European Photonics Venture Forum



Investors Market Session on Datacentres and Wearables



"EPIC's membership is mainly composed of small and young innovative companies, access to finance is crucial for scaling up their businesses and I am glad to be part of this initiative to take concrete actions to truly help."

Kurt Weingarten, General Manager, Lumentum (Switzerland). Member of the EPIC Board of Directors.

>> EPIC PHOENIX AWARD

The EPIC Phoenix Award is presented annually to a company that exemplifies the challenges and merits

of entrepreneurship. The company may have faced difficult times in developing its technology, selling its products, or raising capital, but ultimately managed to position itself as a successful company. Through perseverance, learning from mistakes, engaging its staff, customers, and stakeholders, the company eventually achieved its rebound to success. The EPIC Phoenix Award is a symbol of the challenging realities that entrepreneurs face and the journey that it entails.



Raylase founders Peter von Jan (CEO), Thomas Baab (Head of Production) and Erwin Wagner (VP New Technologies) receive the EPIC Phoenix Award 2016

WEDIA RELATIONS & ARTICLES

EPIC is engaged on editorial boards, invited to press conferences, and regularly publishes articles with contributions from members of the association.

- 1. Press Conference at LpS
- 2. Press Conference at micro photonics
- 3. EPIC interview in Verslo žinios
- EPIC video "Photonics is Everywhere!" screened at the International Year of Light Film Festival during the Closing Ceremony in Mexico
- 5. EPIC publishes in EuroPhotonics "European Commission's Open Access Pilots Aim to Speed Commercialization of Photonics Innovations" with reference to EPIC members CEA-Leti, LioniX, Phoenix Software, VLC Photonics, Alpes Laser, CSEM, Luceda, XiO Photonics.
- EPIC publishes in EuroPhotonics "Landscape Shifting for Laser Materials Processing" promoting EPIC members Fraunhofer ILT, Trumpf, Rofin, Coherent, IQE, Prima Industrie, Oclaro, Light Conversion, Amplitude Systemes.
- 7. EPIC publishes in EuroPhotonics "Pilot Line Underscores Untapped Potential of Mid-IR Spectroscopy" promoting the partners of the MIRPHAB Pilot Line: CEA-LETI, Alpes Laser, Nanoplus, MirSense, the Fraunhofer institutes IAF, IPMS and IPT, III-V labs, Vigo System, PhoeniX Software, CSEM, IMEC, TEMATYS, IQE, Compound Semiconductor Technologies, Bosch, Cascade Technologies, Quantared and Norsk Elektro Optikk.
- EPIC publishes in EuroPhotonics "The Connected World: Banking on Innovations in Photonic Sensors" highlighting EPIC members Nanyang Technological University, LioniX, ICFO, Avantes, Ocean Optics, ACREO.
- Article in Electro Optics "EPIC plays active role in bridging investment/ industry in photonics"
- 10. Article in Europhotonics on UK universities
- 11. Article in OPEN SCIENCE EU on Photonics is Everywhere!
- 12. Article in Optik & Photonik on EPIC AGM 2016 Summary
- 13. Article in Photoniques on "Photonics Industry in Switzerland"
- 14. Article in PIC Magazine "Reinforcing the PIC industry global supply chain"
- 15. Article "Photonics industry largely unaffected by Brexit"
- 16. Article on Silicon Photonics in Data Centers



LpS Press panel conference



micro photonics Press panel conference



Photonics media



Verslo žinios interview



Video interviews

PARTNER EVENTS

- 1. Optro in Paris
- 2. International Laser Symposium & International Symposium in Dresden
- 3. PHOTOPTICS 4th International Conference on Photonics, Optics and Laser Technology in Rome
- 4. CS International in Brussels
- 5. PIC International Conference in Brussels
- 6. PIC Workshop in Anaheim
- 7. Printed Electronics Europe in Berlin
- 8. International Laser Technology Congress in Aachen
- 9. 18th European Conference On Integrated Optics in Warsaw
- 10. ITF Imec Technology Forum in Brussels
- 11. Photonics Event in Veldhoven
- 12. European Photonics Venture Forum in Eindhoven
- 13. Internet of Things Event in Eindhoven
- 14. 32nd European Mask and Lithography Conference in Dresden
- 15. 2nd International Forum on Sapphire Market & Technologies in Shenzhen
- 16. 1st Executive Infrared Imaging Forum: From Niche to Large Volume Applications in Shenzhen
- 17. ECOC Conference and Exhibition in Düsseldorf
- 18. The Photonic Integration Conference in Eindhoven
- 19. LpS LED professional Symposium + Expo in Bregenz
- 20. EOSAM in Berlin
- micro photonics in Berlin
- 22. Photonex UK in Coventry
- 23. Photonics 4 Forestry in Koli
- 24. Chine International Photonics Summit in Shanghai
- 25. SEMICON Europa in Grenoble
- 26. Intelligent Sensor Networks Conference 7th edition in Eindhoven
- 27. BtoHealth in Marseille
- 28. Health Tech Event 6th edition in Eindhoven
- 29. SSSL Workshop in Muttenz
- 30. International MicroNanoConference in Amsterdam



***** *"EPIC is a vibrant network that stimulates innovation, and supports our ambition to maintain an oversight of the fast evolving photonics landscape. Through this platform, ESA is engaging with industry to identify innovations relevant to our business, while promoting our technological needs."*

Iain McKenzie, Senior Engineer Optoelectronics Section, European Space Agency



21 OCTOBER 2016

DAY OF PHOTONICS, initiated by EPIC, is an annual global event that promotes "photonics" to the general public. Around the world, hundreds of companies, universities and organizations involved in photonics reach out to their communities to raise awareness about what is photonics and why it is important.

On 21 October 1983, the General Conference of Weights And Measures adopted the value of 299,792.458 km/s for the speed of light. At the occasion of the anniversary, activities are organized around the world. Every company, research organization, university, school, student chapter, is invited to organize an activity, demonstration, or discussion on the impact of photonics in our day-to-day life.



>> OUTREACH

In 2016, EPIC visited 96 companies around the world. These interactions allow us to personally know our members, learn about technology challenges, explore business and collaboration opportunities.

It was our pleasure to be welcomed by:





>> EPIC MEMBERS

EPIC represents 295 companies across 28 countries. EPIC is membership funded.

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EPIC Activity Report 2016

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group	COTLAND	Tematys	THORLARS	THORN		Borrica	Collogram
Lille1	The University of Nottingham			UVAVE	<u>vario opticio qg</u>	VERTILAS	niga
Wester University of Technology	XCeleprint	photonics	3	yelo Test Systems	yenista OPTICS	VULLE	ZUMTOBEL

EPIC members drive the photonics revolution... Be part of it!



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CONTACT EPIC info@epic-assoc.com

carlos.lee@epic-assoc.com ana.gonzalez@epic-assoc.com carmen.ferrari@epic-assoc.com jose.pozo@epic-assoc.com anna.feis@epic-assoc.com https://be.linkedin.com/in/carloslee https://es.linkedin.com/in/gonzalezanabelen https://nl.linkedin.com/in/carmenferrari https://nl.linkedin.com/in/josepozoepic https://za.linkedin.com/in/anna-l-feis