

Major rail productivity improvement promised



UIRR's Combined Transport Operator and Transshipment Terminal Manager members indicated cautious optimism at the end of the first quarter of the year – following the contraction of 2012. Starting out from the relatively low performance of the previous year, the Operators' crisis induced adjustments in structure and service offering, as well as fewer foreseeable maintenance-related railway disturbances resulted in the UIRR CT Sentiment Index's rebound to 'slightly positive'. The only cause for concern involves the depressed prices that are a consequence of weak capacity utilisation in long-distance road haulage.

The European Commission adopted its much awaited proposal for a Fourth Railway Package on 30 January. Against a barrage of political interventions the Commission finally shied away from prescribing a mandatory structural separation for integrated state-owned railway companies. Instead, the proposal allows for the continued existence of such undertakings in a holding form, while requiring them to fulfil a set of conditions that were described in the related UIRR position papers as the "second best" solution. Subsequently, UIRR endorses this most important governance component of the Fourth Railway Package.

The technical pillar of the Fourth Railway Package that covers rail safety and interoperability, as well as it defines a new and reinforced role for the European Railway Agency may also be considered bold, and is viewed by UIRR to effectively serve the ultimate aim of creating a genuinely Single European Railway Area. The setting of limits to 'national rules' is especially greeted with enthusiasm by Combined Transport Operators and Terminal Managers, who collectively operate an extensive Pan-European freight transport network. The Fourth Railway Package promises a substantial leap in rail productivity, long called for by Combined Transport stakeholders, and thus it will be heartily supported throughout the legislative process by UIRR.

DESTINY, the Common Learning Action Project coordinated by UIRR, which aims to catalyse the proliferation of standards and industry best practice in safety, load securing and the handling of dangerous goods in Combined Transport, has intensively progressed in the past months. Introduction of the ILU-Code to indicate the ownership of European intermodal loading units, in line with the EN13044 standard, is a major goal of this project. The related UIC leaflet revision working group is on track to submit the revised leaflets relating to the mandatory use of the ILU-Code to the UIC Rail Freight Platform for approval in June.

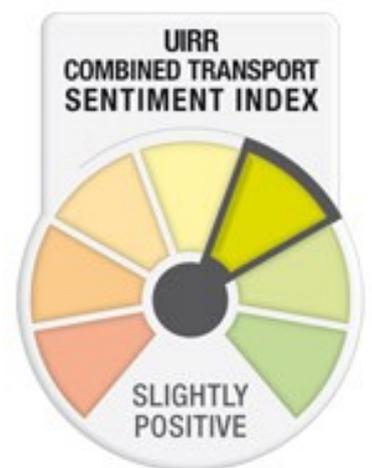
While the ILU-Code sticker service is an effective tool aiding implementation, UIRR wishes to caution every interested party that the time remains short to register their ILU-Code owner-keys, and then to arrange for the marking of their fleet of intermodal loading units.

Martin Burkhardt - Director General

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*Business outlook for
the 12 months between
1 April 2013 – 31 March 2014*



435 days

remain to mark every European intermodal loading unit with the ILU-Code



Obtain your owner-key today: www.ilu-code.eu

Tenders to the last call for proposals are

due on 23 August 2013



<http://ec.europa.eu/transport/marcopolo/getting-funds/>

Fourth Railway Package

January 2013

The European Commission's proposed Fourth Railway Package (4RP) was adopted by the College of Commissioners on 30 January 2013. It follows by only months the enactment of the recast of the First Railway Package that resulted in a single Directive of 2012/34/EC.

The 4RP consists of three pillars:

(i) the Technical Pillar made up of the Directives on Railway Safety and Interoperability, as well as the Regulation on the European Railway Agency.

(ii) the Governance Pillar made up of an amendment of Directive 2012/34/EC, and

(iii) the Domestic Rail Passenger Market Opening Pillar, which consists of some amendments of Directive 2012/34/EC and an overhaul of the Regulation 1370/2007/EC on Public Service Obligations.

See a short video on the 4RP, and the details by clicking this link: http://ec.europa.eu/transport/modes/rail/packages/2013_en.htm

UIRR awaited the 4RP with great anticipation as this package of proposals was expected to remove one of the greatest obstacles of possible further quality improvements in the European railway sector by abolishing the privileged relationships enjoyed by incumbent railway undertakings which operate as part of a vertically integrated group.

Unfortunately, due to fierce lobbying by counterinterested parties, the Commission refrained from its initial intention of proposing an outright legal requirement for mandatory structural separation. Instead, the proposal contains what was described as the "second best" solution to complete structural separation in its position paper on 18 July 2012. [click: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2012/mediacentre/531-position-paper-on-the-fourth-railway-package.html>]

The conditions required to be fulfilled by those incumbent railway undertakings which remain in the integrated (holding) structure in the proposed legislation is viewed by UIRR as satisfactory to achieve the desired aims of cutting privileged

relationships that hinder competition and efficiency improvements in the rail sector.



Particular attention should be paid to protect, and if possible further reinforce, these conditions in the legislative process that is presently under way to enact the 4RP into law.

The Technical Pillar of the 4RP is equally important as it defines

- A new, simplified European regime for safety certification of railway undertakings making it easier for an RU registered in one EU Member State to extend services in another;
- New mechanisms to introduce rolling stock and technologies to the market;
- The single European vehicle passport, which should considerably ease the entry of a suitable locomotive into a network of another country;
- The mandate for the European Railway Agency to review every rail safety related national rule, and to abolish it if found unjustified; and
- New enhanced ways of operations and considerable new resources for the European Railway Agency.

In UIRR's assessment the technical proposals of the European Commission will also advance the cause of devising a Single European Railway Area. The only cause for concern regards the limited quantity of resources proposed to be made available to implement the new European law. UIRR would like to see these resources increased both at the Commission level and at the European Railway Agency.

A lot will have to be done to successfully guide the proposed 4RP through the legislative process, but even more work will be needed once the new rules become law. The new law will define the legal framework that promises the possibility of meaningful improvements in rail competitiveness; much entrepreneurial innovation, new private investors and determination to consistently apply the law will be needed to deliver it.

UIRR launches LinkedIn Group

March 2012

A new professional LinkedIn group – titled 'UIRR for Road-Rail Combined Transport' – has been recently launched on behalf of UIRR to create a platform of exchange for all those stakeholders of Combined Transport who are registered on this dynamically growing social media site. To visit this group click: <http://www.linkedin.com/groups/UIRR-Road-Rail-Combined-Transport-4899523>.



The LinkedIn group forms the main pillar of UIRR's Web 2.0 dissemination strategy, which will include subgroups to serve as deliberation platforms for those interested in technical, operational, dangerous goods, and other specialised topics of Combined Transport, as well as on the projects and other activities of UIRR. Stakeholders, and any interested parties, are encouraged to register and become members of this professional group.

Longer and heavier freight trains

7 February 2013

Among the various topics of the Ports, Terminals and Intermodal Transport Conference (6-7 February, Amsterdam) the subject of productivity reserves in rail freight was discussed.

It was found that an increase of train length on a particular Trans-Alpine route from 1600t / 575m / P380 loading gauge today to 2000t / 750m / P400 loading gauge would result in a minimum 30% productivity increase, which could further be improved in case the inclinations to be managed by the freight trains are reduced through the development of base-tunnels.

UIRR has been advocating the launching of a TEN-T Action to be made up of development projects that would result in the releasing of this productivity reserve, which is also the cheapest way of boosting infrastructure capacity in places where there is no physical space left to construct new tracks.

	Traction concept:	Load hauled:
Today	1600 t / 575 m / P380  Double traction assisting locomotive	 550 m = 27 wagons
As of 2019	2000 t / 750 m / P400  Double traction (4-axes locomotive) or  Single traction (6-axes locomotive)	 710 m = 35 wagons Productivity + 30%
		 730 m = 36 wagons

Considerable productivity is lost not only in the most important European CT axis – from the Northern ports thorough the Alps to Italy – due to maximum allowed train length deficiencies, but also in the Germany-Poland relations, where trains entering the East-German and then the Polish network must be nearly 100m shorter than the maximum possible length in Western Germany [the Hamburg area]. These productivity losses bear heavily on the competitiveness of Combined Transport.

Re-regulation of road vehicle dimensions

15 April 2013

The European Commission unveiled its proposal to amend Regulation 1996/53/EC covering the weights and dimensions of commercial vehicles. The proposal covers the following topics:

- Changes to exterior dimensions: longer cabs to allow for aerodynamic elements, and the possibility to extend trailers with removable aerodynamic elements.
- The Member States would be empowered to certify the trafficworthiness of the aerodynamic elements – based on criteria established through delegated acts by the Commission – which would then be valid for the entire European Union.
- Trucks carrying intermodal loading units will be allowed 15 extra cm in length which is needed to legally carry 45-foot ILUs with rectangular corner fittings; the road “positioning legs” performed in the European Union shall be not more than 300km on each end.
- Enhanced controls and a requirement of more meaningful fines for overloaded and oversized road vehicles. In case of transporting loading units the shipper will be required to provide the weight data of the loading unit, which will help prevent the overloading of rail wagons as well.

The subject of cross-border circulation of megatrucks [allowed with a special permit between “two consenting neighbouring Member States”] is inadequately described in the proposed amendment, as the proposal fails to describe the conditions to be met by the holders of the special permit, and its controlling.

Click here for UIRR’s input during the proposal’s drafting process: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2012/mediacentre/512-ec-public-hearing-on-the-revision-of-directive-9653.html>

Click here for the dossier:

http://ec.europa.eu/commission_2010-2014/kallas/headlines/news/2013/04/lorrys_en.htm



UIRR is yet to thoroughly analyse and formally draft its position on the Commission’s proposal. However, at first sight UIRR is ready to endorse the proposed 15cm extension of trailers of those vehicles that carry a 45-foot pallet-wide loading units with rectangular corner fittings.

While more aerodynamics may in general be welcome, UIRR maintains that prior for manufacturers to opt for an extension of the cab-length they should prove to have exhausted every aerodynamic option that is possible within the existing vehicle dimensions. In any way, the limits of cab-length extension should be confirmed in a scientific study so as to preserve the vehicles compatibility with Rolling Motorway services. Similarly, a scientific study should be prepared prior to specifying the trafficworthiness conditions that rear-mounted collapsible aerodynamic elements should meet. Moreover, compatibility of a semi-trailer equipped with such a “removable device” with Rolling Motorway requirements, as well as the possibility of its safe transport in a pocket wagon should also be upheld. For the same reasons any extension of HGV width – from the present 2600mm maximum – should not be allowed.

In principle, no changes to HGV dimensions should be permitted that may hinder the much needed modal shift to rail, which is by far the most effective way to reduce energy consumption and GHG emissions, as well as accidents in transport, than any other measure, including innovative aerodynamic devices.

State aid complaint against Slovak terminal plans

23 January 2013

Based on a market study conducted in 2007 Slovakia decided to initiate a state sponsored programme for the construction of four transshipment terminals (a trimodal in Bratislava, road-rail terminals in Leopoldov, Zilina and Kosice). These locations were found to be optimal to ensure the full Combined transport coverage of industrial parks and major industrial sites within Slovakia. The new terminals to be developed with a 750m track length and two gantry cranes and a RoMo loading track each are to form part of the TEN-T network. The €135 million development is planned to be 85% financed from the EU's cohesion fund and 15% from the State's own funds. The terminals will be open access and a 30-year concession for their operation will be openly tendered [ownership will permanently remain with the Slovak State].

METRANS Danubia s.a. filed a complaint with the European Commission in 2011 alleging that the state-sponsored terminal construction programme will significantly distort competition in the market, as it will crowd-out private investment in the market [several terminals exist in Slovakia already, most developed by private investors] as existing road transport that can be transferred to rail in Slovakia had already been transferred.



Two of the 11 registered terminals in Slovakia are closed, while tracks of only the Dunajská Sreda Zilina and the Dobrá terminal exceed 400m, the Slovak government maintains the necessity and viability of constructing the proposed modern and efficient terminals. Moreover, few of the existing terminals offer open access to independent CT Operators. The cost/benefit analysis prepared by the Slovak government has been supported by CT Operators Bohemiakombi and Kombiverkehr, while CT clients DHL Express and GEFCO.

Total freight transport volumes to and from Slovakia is forecast to grow by 50% from 236M tons in 2007 to 353 million tons in 2020. The volume of CT traffic in Slovakia between 1993-2011 has grown on average 17% year-on-year.

Finally, over a 30-year period the calculated externality savings of Slovakia and the European Union attributable to the modal shift to be enabled by the construction of the four new terminals, which are to begin operations in 2015, is estimated to reach €1,8 Billion [Slovakia €553 million, the EU €1,24 billion].

DG Competition requested additional information from Slovakia before it can pass judgment on the state aid complaint of METRANS.

Developer of RoMo wagon wins 2013 European Technical Award

26 February 2013

The 2013 European Railway Award was presented to Benedikt Weibel, former CEO of the Swiss Federal Railways (SBB) for political achievements, while the Technical Award to Dr Johannes Nicolin, Technical Director of AAE Holding AG.

Dr Nicolin worked as Director of Engineering for freight wagons and bogies at Waggonfabriek Talbot (in Aachen) at the time for development of the intermodal freight wagons used in Rolling Motorway transport today in Europe. His innovations helped to reduce maintenance costs and enhance handling efficiency.

Dr Johannes Nicolin has sought the overall improvement of rail freight competitiveness and system optimisation throughout his career, and had a significant impact on the international harmonisation of rail freight technology.



He is an active participant of the Technical Committee of INTERUNIT, the collaborative platform of Combined Transport Operators and European Freight Railway Undertakings, which is operated under the coordination of UIRR and UIC.

<http://www.europeanrailwayaward.eu/>



Shift²Rail R&D Initiative

January 2013

The Shift²Rail Joint Technology Initiative will provide the framework for the large-scale, industry-driven multiannual research and development programme that will have to be carried out to deliver the innovation need to reach the strategic

aims defined in the EC's 2010 Transport White Paper for the European railway sector. The initiative has a budget of up to €1 billion over a 11-year period under the Horizon 2020 Programme.

For more information: <http://www.unife.org/page.asp?pid=194>



Rail Freight Status Report 2013

12 April 2013

The Community of European Railways and Infrastructure Managers [CER] issued a report on the status of rail freight in Europe. The 100 page comprehensive Report observed that:

- While Combined Transport developed dynamically, overall rail freight market share in Europe dropped by 2,3 percentage-points from 18,5% to 16,2% between 2000-2010.
- Despite rail freight's superior energy efficiency and GHG emission performance, as well as safety, reliability and price remain the two shortcomings most mentioned by customers.
- The number of freight railways joining to the CER/UIC/CIT Freight Quality Charter has increased to cover about 80% of rail freight performance, and most major European freight railways have introduced certified quality management systems; nonetheless quality performance remains inadequate – reflected in average punctuality and customer satisfaction levels that both stagnate around 70%.
- The lack of investment in rail infrastructure, and the traffic congestion that results as a consequence, are blamed for the quality performance shortfalls.

The Report lists 17 recommendations deemed necessary to improve the situation of rail freight that include more EU funding provided to freight-related rail infrastructure development, an alignment of infrastructure access charges between road and rail, full internalisation of transport externalities, harmonised social conditions across modes, improved technical interoperability, and positively discriminated single wagonload.

Downloads:

The CER Report: http://cer.be/index.php?id=98&tx_ttnews%5Btt_news%5D=990&cHash=329198e9bc8e4c7827651eca00c53ba2

UIRR's CT Roadmap: <http://www.uirr.com/en/media-centre/press-releases-and-position-papers/2013/mediacentre/564-uirr-ct-roadmap-2050.html>

Marco Polo 2013 call for proposals

26 March 2013

The European Commission has announced the last call for proposals under the Marco Polo programme as it is presently known. Accordingly, €66,7 million will be handed out to support modal shift from road to the following three prioritised alternative modes of transport:

- Short sea shipping / Motorways of the sea
- Inland waterways
- Single wagonload.

For more information: <http://ec.europa.eu/transport/marcopolo/getting-funds/>



UIRR – which represents the operators of Combined Transport, rail freight's healthiest production system – applauds CER's drafting of this Report.

While agreeing with most findings and conclusions, UIRR wishes to point out the importance of competition, which is believed by CT Operators to entail a significant possibility to improving rail quality; it has been severely downplayed by the authors. Measuring competition in the market share of new entrants is entirely inadequate; rather UIRR recommends measuring competition in the control over the proportion of traction capacities in a given network, and the levels of private capital investment. UIRR remains convinced that more competition in rail will bring improvements in both service and price levels.

Secondly, the degree of transparency with regards to the actual performance of rail freight that is permitted by integrated (state owned) railway companies and their freight subsidiaries remains entirely inadequate. Punctuality, reliability, as well as average speed improvements, the avoidance of unnecessary disturbances like locomotive and driver changes, and smoother border crossings will only become possible if adequate information is disclosed on the functioning and operations of state-owned railways and infrastructure managers.

UIRR in its Combined Transport Roadmap 2050 Paper, published on 23 January 2013, recommended several measures to improve rail productivity that will ultimately lead to enhanced rail freight competitiveness in the whole of Europe.



The declared prioritisation does not mean that Combined Transport projects [under the Modal Shift Action] could not be proposed. The possibility also remains open to propose Common Learning Action projects.

In its Combined Transport Roadmap 2050 UIRR called for a restructuring of the Marco Polo programme so as to eliminate the possibility for subsidised "new" services to cannibalise existing CT services [through their subsidy-guaranteed cost advantage].

Valencia-Lyon-Turin-Záhony

Corridor 6

Corridor 6 is the main East-West axis of Europe which runs to the south of the Alps originating in Spain crossing through Southern France and Northern Italy through Slovenia into Hungary to reach the transshipment area of Záhony on the Ukrainian border.

Among others, UIRR operators Combiberia, Novatrans, Naviland Cargo, Cemat, Hupac, Alpe Adria, Adria Kombi offer services along this Corridor encompassing more than a hundred terminals and some very important manufacturing areas of the European Union.



Prague/Vienna-Budapest-Athens

Corridor 7 www.rfc7.eu

Originating in the Czech Republic, Corridor 7 crosses Western Slovakia and Hungary to form the main Northwest-Southeast axis across the Balkans linking Turkey, as well as the Black Sea and Mediterranean ports to the very middle of the continent.

Bohemiakombi, Kombiverkehr, Rocombi, Adriakombi, IFB and Hupac are some of the CT Operators that offer connections in the relations covered by Corridor 7.

Hungarokombi, which used to operate RoMo services along Corridor 7 was unfortunately forced to stop its operations due to the combined effects of a delay in eToll introduction in Hungary, the discontinuation of government aid and increasing track access charges.



First European Rail Freight Corridor Conference

12 April 2013

The European Commission organised the First Rail Freight Corridor Conference, which aimed to bring together management entities and stakeholders of European rail freight corridors defined in Regulation 913/2010/EC.

UIRR was present in its capacity as a representative of CT Transshipment Terminals, strategic components of the corridors. Cross-border train paths are expected to be defined, which efficiently connect these terminals with one another.

Infrastructure managers gave account of the progress they achieved in setting up the corridor management entities, coordinated investment plans, and the catalogues of pre-arranged train paths that they must offer from 2014.

Corridors 1 [<http://www.corridor1.eu/>], 2 [<http://www.corridor2.eu/>], 7 [<http://www.rfc7.eu/>] and 8 [<http://www.corridor8.org/>] have established their respective websites, where stakeholders can follow their progress.



DESTINY Project update

April 2013

A best practice report is being compiled on the application of the EN13044 standard, which deals with – among others – the issue of marking identifying intermodal loading units: interviews are being carried out in five European countries with involved stakeholders (i.e. DHL, Winner, SNCF, B-Logistics, AGORA Terminals, DB Schenker). Workshops for manufacturers of loading units will be organised in the coming months.

The UIC CT-Leaflet Revision Working Group is nearing to the completion of its mandate; the revised EN13044 implementation-related leaflets will be submitted for approval before the Summer.

Dissemination activities were also intensely carried out during the first three months of the year.

EcoHubs Project update

April 2013

The EcoHubs Project, previously known as « Hubways » had to change its name as it became known that a private company has submitted a copyright request for the Hubways name some weeks before the project was named. The company, having received the copyright a few months ago has requested that the Project change its name; hence the new name: EcoHubs.

WP1 conducted several meetings to clarify the vision (common understanding) and structure of the promised deliverables – the document will be available very soon.

ILU-Code developments

April 2013

Following the 21 months that passed since the ILU-Code became available to the owners of European intermodal loading units, and registrations have begun, UIRR [the Administrator of the ILU-Code] would like to draw the attention of the interested parties to the transition process to EN13044 compliant marking of loading units. Subsequently the steps after deciding to begin the process are as follows:

- Registration of the ILU-Code owner key – which can be easily done on the www.ilu-code.eu website.
- Adapting internal [ILU-owner-specific] numbering to the structure of the ILU-Code: a six digit identifier all made up of numbers should be chosen for each loading unit.
- Calculating the check-digit for each unique identifier – to which the check-digit module to be found on the ILU-Code website is a helpful aid.



In relation to the handling of dangerous goods in Combined Transport a new brochure was developed, which will soon be made available to every stakeholder. Moreover, a market analysis was carried out in several countries to better understand actual flows, market shares, and shippers' preferred modes of transport.

The load securing aspects of the DESTINY project the collection of existing standards have been completed; and presently there is a gap analysis being conducted involving road and intermodal transport actors.

An important workshop on the nature and use of OCR technologies in Transshipment Terminals will take place in the coming months.

WP3 held several meetings to discuss and finalise the structure of the demonstrations (matching these with the vision finalized under WP1) that are to be carried out under the aegis of the Project. Among the various tools, a CO₂ calculator for transshipment terminals will certainly be developed.

The first Advisory Board meeting of the project will take place on 23 May in Antwerp, which will review all the work the project has done until now.



The second phase in the application of the new marking regime onto the loading units:

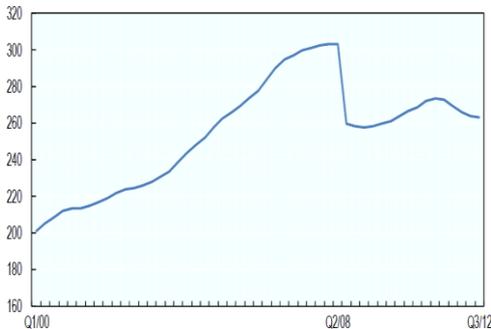
- In case of new loading units: the manufacturer will have to be adequately instructed.
- Presently owned loading units: should be marked using self-adhesive labels that may be effectively ordered using the www.ilu-code.eu/en/ilu-code-stickers website. The application of these stickers, in case a larger number of loading units will have to be marked, may require careful planning to coincide with the regular maintenance of the loading unit.

Please be reminded that the halfway point of the three-year transition period agreed to by CT Operators, Transshipment Terminal Managers and railways has been passed; only 435 days remain [until the 1 July 2014 deadline].

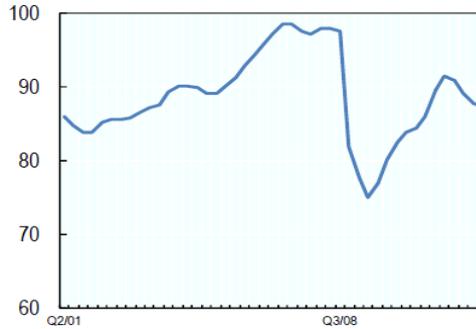
OECD / ITF freight statistics

April 2013

Road freight in the European Union (Bn tkm)



Rail freight in the European Union (Bn tkm)



Both rail and road freight declined dramatically (about 13% and 20% respectively) as a consequence of the economic and financial crisis. Combined Transport lost 17% of its tonne-kilometres at the same time. While neither of the two modes managed to recover their losses, CT did that in the two years of 2010-2011. The downturn of 2012, unfortunately, wiped out nearly half of the recovery results for every mode.

Recent Appointments

NOVATRANS

March 2013



Mr Alexandre Gallo has been appointed the CEO of Novatrans. Mr Gallo obtained his diploma from the Marseilles School of Management, and worked as Managing Director of Greenmodal, a subsidiary of the CMA CGM Group.

The shares of Novatrans were recently sold by SNCF to French Logistics Group Charles André.

NOVATRANS

March 2013



Mr Jérôme Minfray, has been elected as the Chairman of Novatrans. Mr Minfray is a senior manager at Group Charles André, which recently became sole shareholder of Novatrans.

Members' News

NAVILAND CARGO

February 2013

New website launched.

Click: <http://www.naviland-cargo.com/>

Key Dates & Events

16-17 April, Bonn	INTERUNIT Technical Committee Meeting
23-25 April, Birmingham	Multimodal 2013 Exhibition
12-14 May, Antwerp	Bulkports, Terminals and Logistics Exhibition
15-16 May, Paris	UIRR and Interunit General Assembly
22-24 May, Leipzig	International Transport Forum Summit 2013
5 June, Brussels	Community of European Railways (CER) 25-year Anniversary
September, Valenciennes	European Railway Agency 10-year Anniversary Event
8-10 October, Hamburg	Intermodal Europe 2013
9-11 October, Antwerp	GreenPort Conference
12-13 November, London	European Rail Congress
13 Novembre, Brussels	2 nd EU Rail Freight Corridor Conference



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