

Slovenian Intermodal Gateway to European Rail

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S.IN.G.E.R. Conference

Ljubljana, June 8th, 2006



CEMAT



- **Introduction**
Mr. **Rok Svetek**, Managing Director of Adria kombi
- **Opening speach**
Mr. **Janez Sušnik**, The President of the National Council of the Republic of Slovenia and the President of Adria kombi
- **Marco Polo Programme**
Mrs. **Anne M. Barseth**, Project Officer, European Commission DG TREN
- **UIRR's strategy for the EU enlargement**
Mr. **Martin Burkhardt**, Director General UIRR



European Commission
Directorate-General for Energy and Transport
Unit G3 – Motorways of the Sea & Intermodality

The Marco Polo Programme

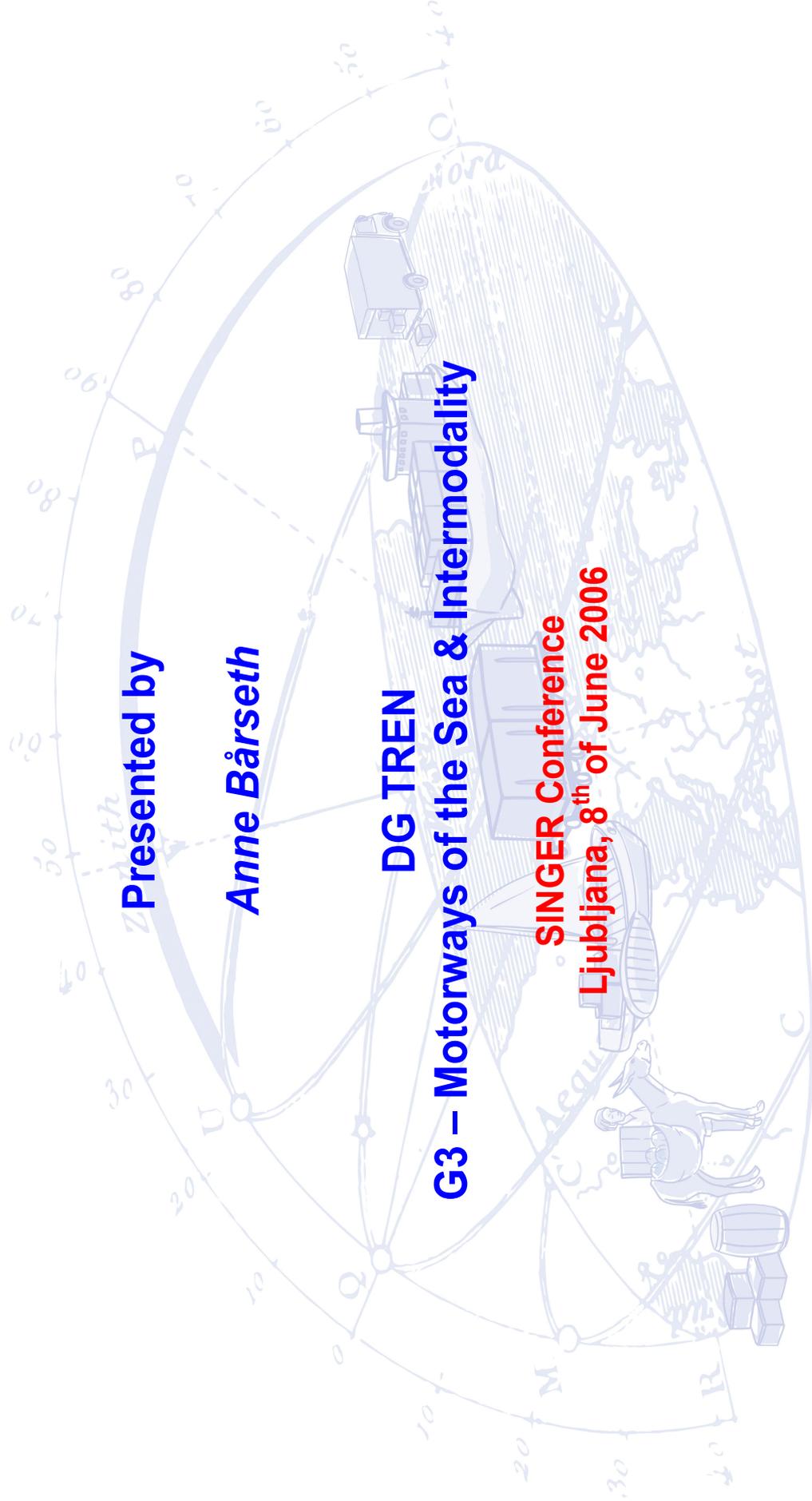
Presented by

Anne Bårseth

DG TREN

G3 – Motorways of the Sea & Intermodality

SINGER Conference
Ljubljana, 8th of June 2006





The Marco Polo Programme

Key Features

- Common to all supported Types of Action -

➤ **Introduction**

◆ Road freight traffic increase: around 20 billion tkm/year for EU 25

➤ **Objective: Shift *international* increase off road**

➤ **Duration: 2003 - 2010**

➤ **Budget: 102 Mio€ for 2003 - 2006**

➤ **Scope**

◆ **Services only**, i.e. no RTD, no studies, no (core) infrastructure





European Commission

Directorate-General for Energy and Transport
Unit G3 – Motorways of the Sea & Intermodality

Key Features (continued)

Eligible type of legal entity

- ◆ **Commercial undertakings only**

Eligible to *participate* in a project consortium, if entity situated in

- ◆ EU Member States
- ◆ “Close third country”, e.g. Candidate Countries, Mediterranean Countries

Eligible for *EC-funding and full participation* if costs arise **only** on territory of

- ◆ **EU25** Member States
- ◆ EFTA & EEA States after conclusion of specific agreement
- ◆ Candidate States after Memoranda of Understanding (BG, RO, TY, CR)
- ◆ Full participation of: **EFTA/EEA and Romania, probably Croatia and Bulgaria for 2006.**

European dimension

- ◆ **International** trajectories, involving the territories of at least one EU Member State and a “close third country”
- ◆ At least **2 undertakings** situated in 2 different eligible countries, of which at least 1 must be in EU.



Programme Structure

The 3 Types of Action

- ◆ **Modal shift actions**
 - Robust, but not innovative: - *just shift freight off road*
 - Subsidy of 1 € per 500 tkm shifted
 - Minimum subsidy threshold 500 million €; Subsidy rate up to 30%
 - => at least 250 million tkm shifted per contract; duration up to 3 years
- ◆ **Catalyst actions f. ex. high speed freight trains on internat. routes**
 - Overcome structural market barriers
 - Highly innovative: - *causing a real break through; duration up to 4 years*
 - Minimum subsidy threshold 1.5 million €; Subsidy rate up to 35%
- ◆ **Common learning actions f. ex. European training centres**
 - co-operation and sharing of know-how
 - Mutual training: - *coping with an increasingly complex transport and logistics market; duration up to 2 years*
 - Minimum subsidy threshold 250 million €; Subsidy rate up to 50%

Avoidance of undue distortion of competition



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Timetable

- **MP's Start-up & First Calls-**

➤ **02 August 2003** Publication of programme in Official Journal of the EU (OJ (2003) L 196/1)

➤ **03 August 2003** Programme enters into force

➤ **First Call (budget: 15 mill.)**

◆ 11 Oct. 2003 Call for proposals

◆ 10 Dec. 2003 Deadline for proposal submission

92 Proposals, 87 eligible to enter the evaluation

◆ Oct.-Dec. 2004 Contract signatures (incl. reserve list) - 13 projects finally contracted

➤ **Second Call (budget: 20,4 mill.)**

◆ 15 Oct. 2004 Call for proposals

◆ 15 Dec. 2004 Deadline for proposal submission

62 Proposals, 59 eligible to enter the evaluation

◆ December 2005 Contract signatures – 12 projects finally contracted



European Commission

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Unit G3 – Motorways of the Sea & Intermodality

Timetable

- MP's Further Roadmap -

Third Call (budget: EUR 30,1 million)

- ◆ 24 November 05 Call for proposals
- ◆ 30 January 05 Deadline for proposal submission
- 63 Proposals, 60 eligible to enter the evaluation**
- ◆ May 2006 Applicants informed of results & Start of contr. negotiations - 17 projects selected for funding
- ◆ 12/13 July 2006 Programme Committee meeting (participating countries)
- ◆ Autumn 06 Contract signatures (incl. reserve list)

Fourth Call (budget: EUR 35 million)

- ◆ Mid July 06 Call for proposals
- ◆ Sept./Oct. 06 Deadline for proposal submission
- ◆ Early 2007 Applicants informed of results & Start of contr. negotiations
- ◆ Summer 07 Contract signatures (incl. reserve list)

Start-up of Marco Polo II (subject to successful conclusion of legislative procedure)

- ◆ 01.01.2007 Start of programme (MP I would then stop)



Marco Polo II

MP II (2007-2013)

Increase of budget 400 million € (based on 2004 figures, 450 € including inflation)

◆ Introduce 2 new innovative types of action:

- **Motorways of the Sea (complementary to TEN: service bound, ancillary only, short term – 60 months max, min. subvention: 2,5 million €)**
 - **Traffic Avoidance (practical solutions to reduce the number of trucks on the road, max 60 months, min. subvention: 1 million €)**
- ◆ Upgrade ancillary infrastructure support for catalyst -, traffic avoidance - and motorways of the sea actions (limited infrastr. support in modal shift actions, “*the Community shall examine the possibility of supporting ancillary infrastructure projects*”)
- ◆ Wider Europe welcome to fully participate via special agreements (add. Budget!) All close third countries can participate fully to MP II



Marco Polo II

- ▶ 17 May 2006 Parliament's First Reading adopted
- ▶ 8/9 June 2006 Council's Common Position
- ▶ Autumn 2006 Publication in the OJ
- ▶ 01.01.2007 Start of MP II Programme
- ▶ First semester 2007 First Call for Proposals



European Commission
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Unit G3 – Motorways of the Sea & Intermodality

Further Info & Contacts

➤ Marco Polo Programmes:

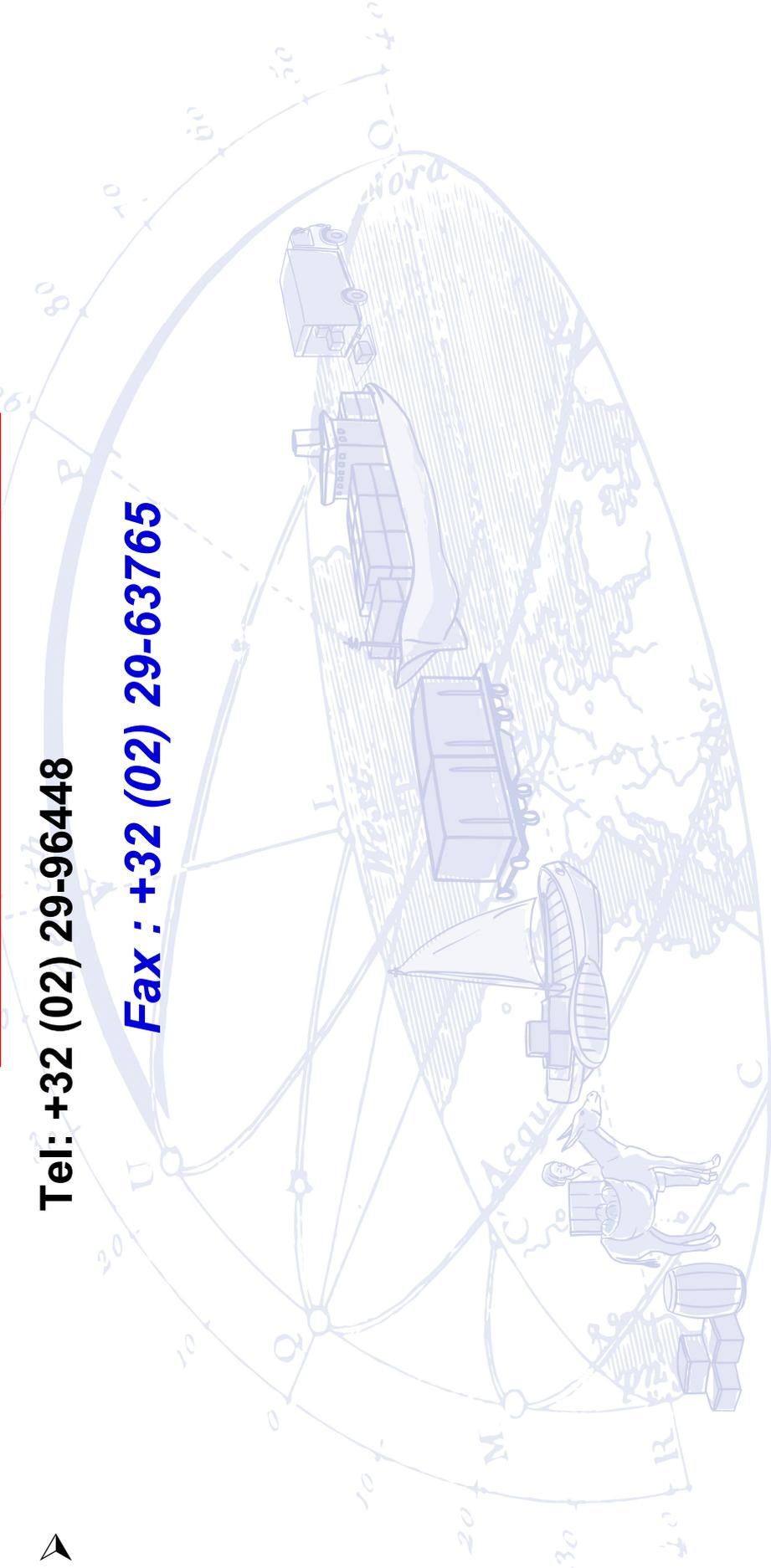
Help Desk:

http://europa.eu.int/comm/transport/marcopolo/index_en.htm

Email: tren-marco-polo@ec.europa.eu

Tel: +32 (02) 29-96448

Fax : +32 (02) 29-63765



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UIRR's strategy for the EU enlargement

Martin Burkhardt
Director General UIRR

Why Combined Transport?

GENERAL ADVANTAGES

- relief of the road network
- transfer of goods to a safer and more environment-friendly transport mode, which is also more independent from climatic conditions
- better sharing of transport volumes between modes
- recourse to available transport capacities
- co-operative activity combining the advantages of road (flexibility) and rail (more economical, mass transport on larger distances)
- competitiveness in given circumstances

Why Combined Transport?

ENVIRONMENTAL BENEFITS

	<i>Reduction in CO₂ emission</i>	<i>Energy savings</i>
Unaccompanied CT – sample of 18 axes	60%	29%
Accompanied CT – sample of 2 axes	23%	11%

The UIRR in brief

TWO-LEVEL ORGANISATION (decentralised structure)

- 1 Liaison Office Brussels
 - overall promotion of CT
 - coordination of members' activities
 - service centre (projects, reports)
- 20 Member Companies
 - 19 active members & 1 associated member
 - organising and marketing of CT
 - wagons in ownership
 - management of transshipment yards (terminals)

Main Objective: Shift traffic from road to rail

UIRR Members

More than 2.5 Mio
lorry equivalents
shifted in 2005
from Road to Rail

Tripling of
international
traffic in 15 years

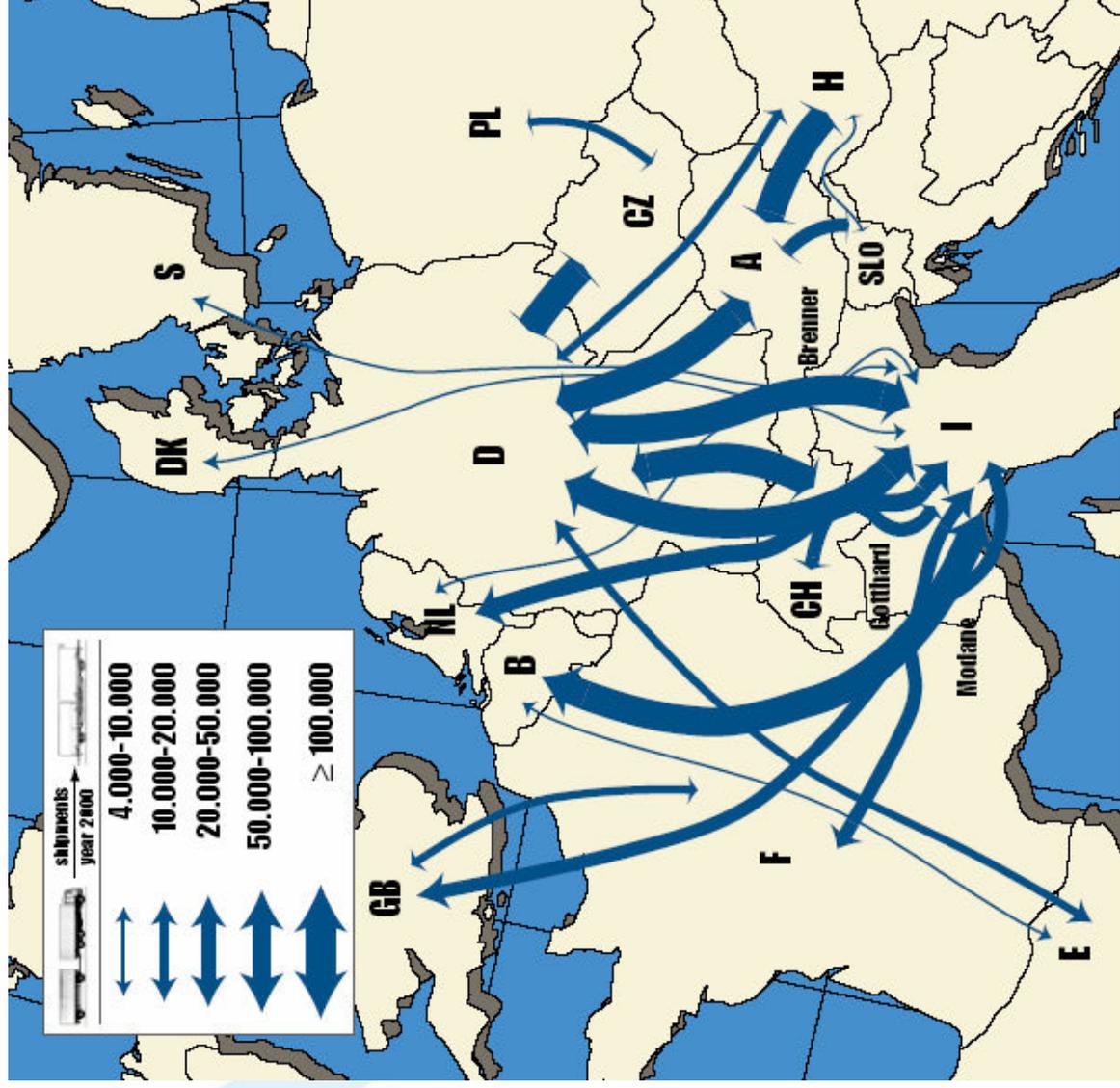
Doubling total
volume in 15
years



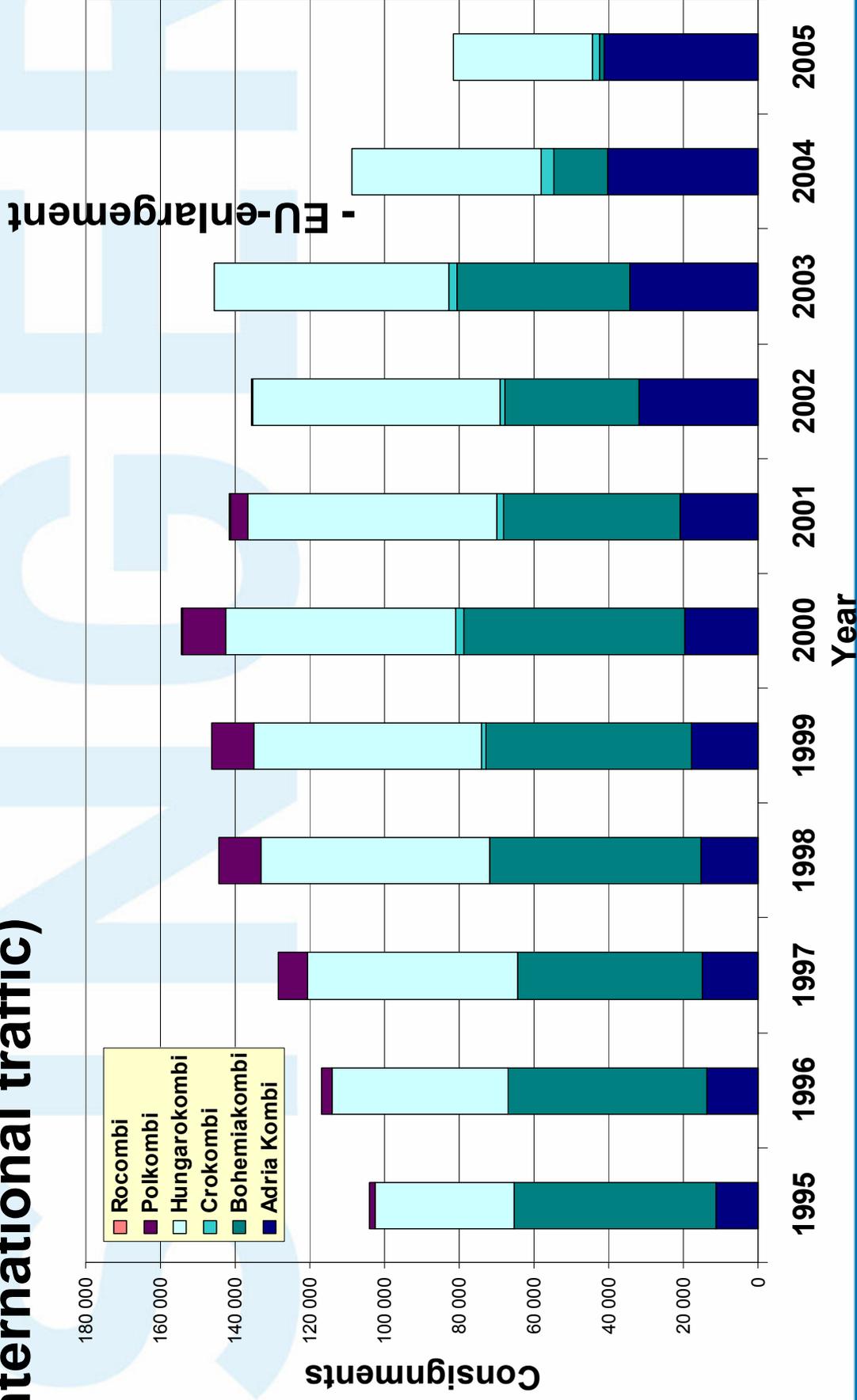
UIRR Main Traffic flows

Two thirds: alpine
crossing traffic
Why?

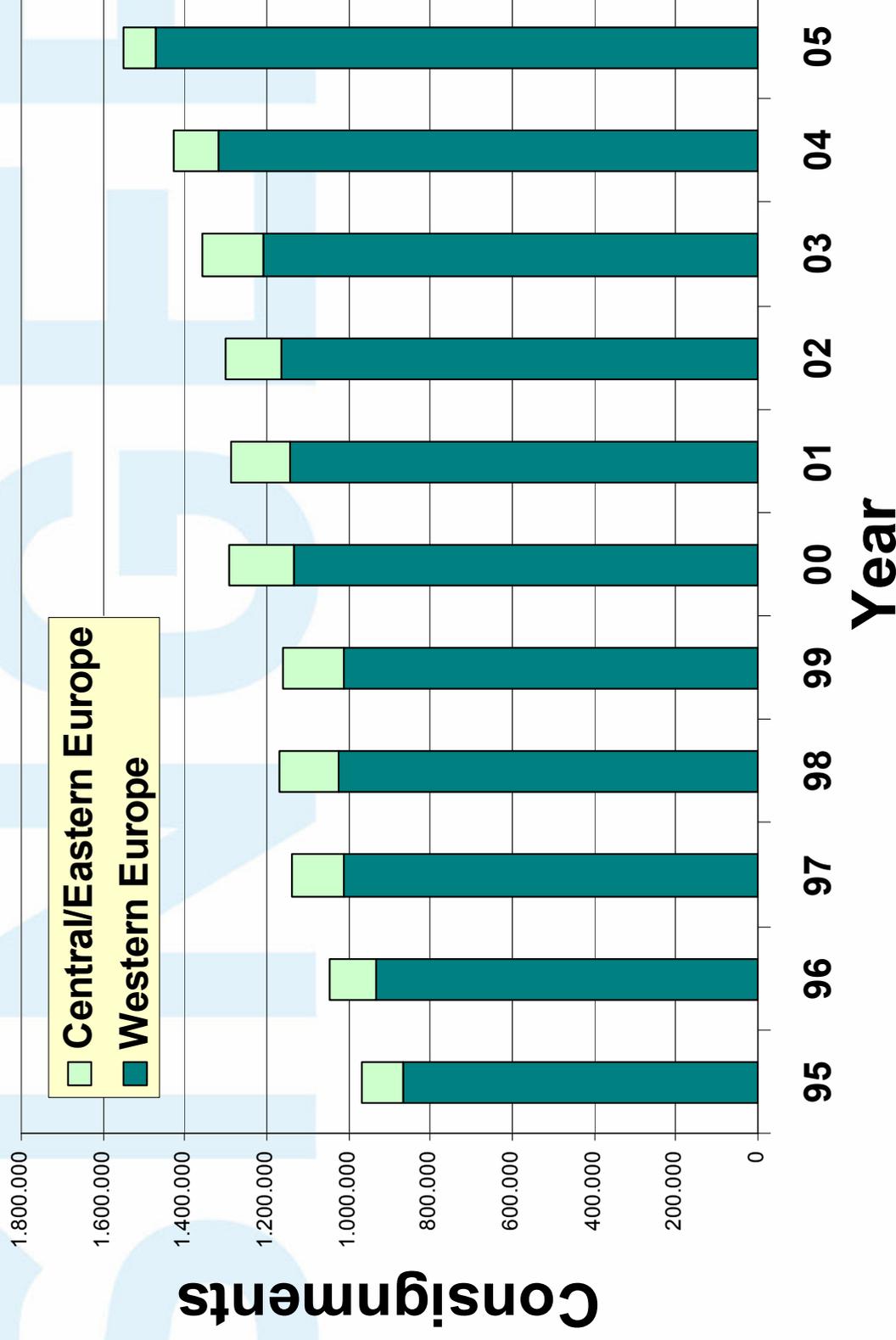
- geographical obstacle
- investment in rail
- road tolls



Eastern Europe: Proportion per UIRR company (international traffic)

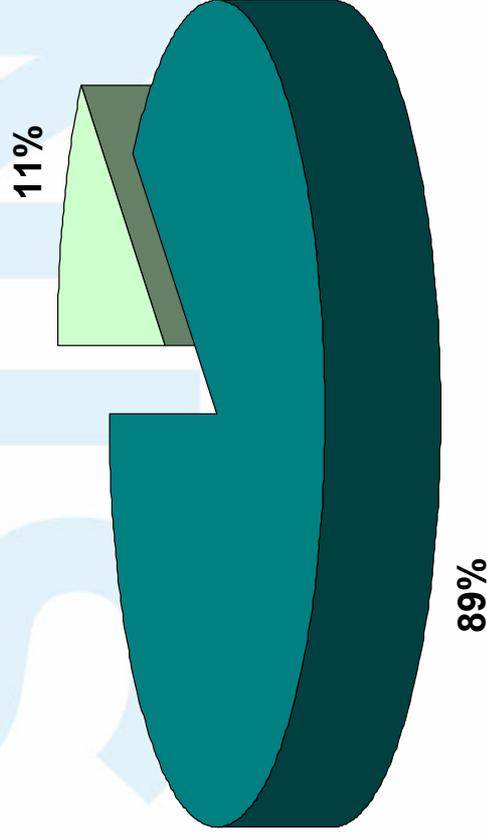


Proportion East/West international traffic



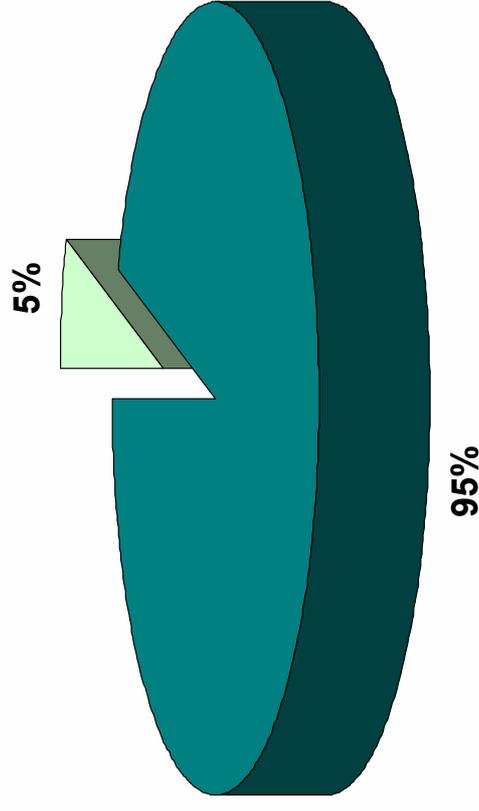
UIRR international traffic: Evolution between 2003 and 2005

Before EU enlargement
(2003)



Dramatic drop of RoMo traffic

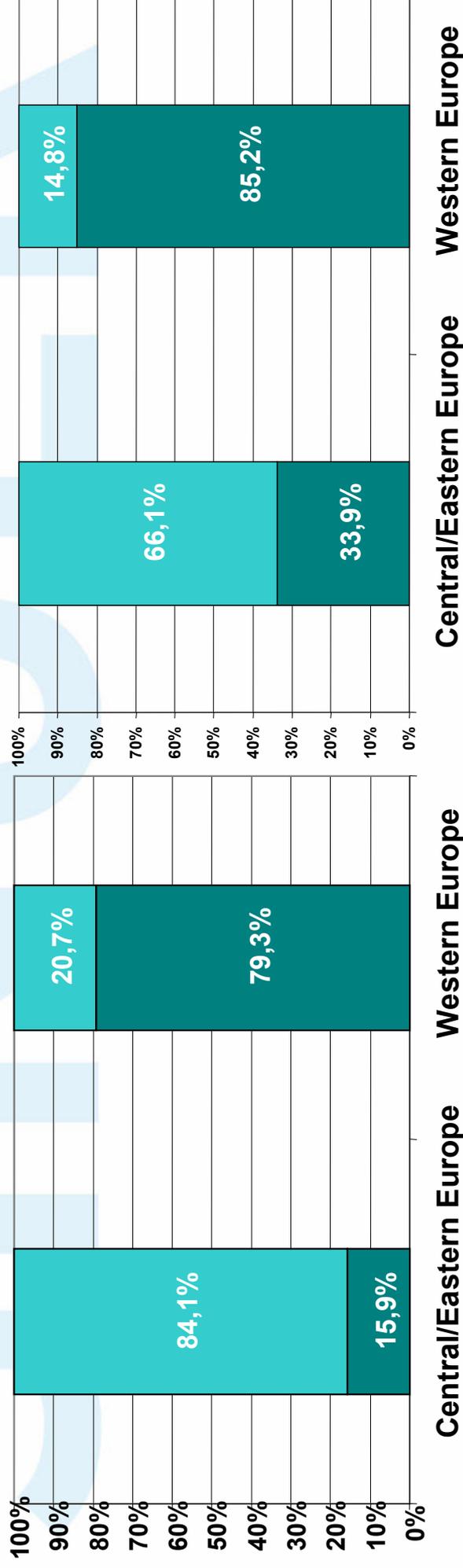
After EU enlargement
(2005)



Proportion of CT techniques: on the way to adaptation ⇒ from Rolling Motorway to unaccompanied traffic

Before EU enlargement
(2003)

After EU enlargement
(2005)



Quality control 1999-2005: East/West corridors (Unaccompanied Traffic)

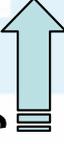
<i>Total both directions</i>							
	1999	2000	2001	2002	2003	2004	2005
Number of trains	748	630	1286	1394	1288	1728	873
On Time	43%	42%	44%	59%	42%	59%	65%
Delayed	57%	58%	56%	41%	58%	41%	35%
More than 3 hours	23%	24%	18%	15%	30%	24%	21%
More than 24 hours	0%	0%	0%	0%	0%	0%	0%

On time = first unit ready for pick-up (under the crane)
with tolerance of 30 minutes

Conditions for success

- Infrastructure
 - Rail (track gauges generally good)
 - Track conditions: upgrade 22,5t at 120 km/h
 - Terminals (e.g. BILK in Budapest)
 - Wagons
 - Loading units
- Better (international) cooperation between IMs, RUs-IMs, international traction by RUs
- Customer oriented driven attitude
 - Set-up of Quality Groups 'Railway Undertakings and CT operators'

Conclusions

- Deep market changes
 - Complete road liberalisation – rail must follow
 - From RoMo to Unaccompanied System  **SINGER Project**
- Need for ‘sustainable mobility’
 - Better political framework conditions (user-pays)
 - Rail liberalisation: clear separation between operations and infrastructure
 - More financial support for unaccompanied services for

Central/Eastern countries: Marco Polo - **SINGER**

THANK YOU FOR YOUR ATTENTION

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Slovenian Intermodal Gateway to European Rail

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Coffee Break



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- **Presentation of the Slovenian Railways**

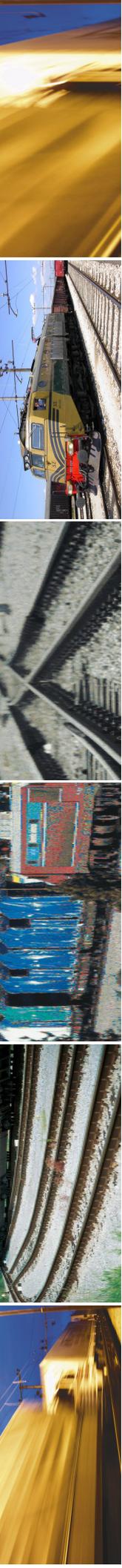
Mr. Igor Hribar, Assistant Executive Director for
Freight, Holding Slovenian Railways

- **Presentation of the Port of Koper**

Mr. Gordan Ban, Advisor Shipping Bussines
Development, Port of Koper

- **Presentation of the project SINGER**

Mr. Janez Merlak, Project Manager, Adria kombi



Freight transport of Slovenian Railways

Igor Hribar

Assistant Executive Director for Freight Transportation

Holding Slovenske železnice, d.o.o.

Tovorni promet/Freight transport

Ljubljana, 15.02.2006



Key Facts Of SŽ-Freight



Results	2004	2005
Transport revenue (Mio EUR)	115	116
Goods transported (Mio t)	17,9	18,1
Work performed (Bio ntkm)	3,5	3,6
Train Km (Mio trkm)	7,6	7,5
Average nr. of trains/day	222	206
Resources	2004	2005
Locomotives	130	130
Wagons	4.153	4.284

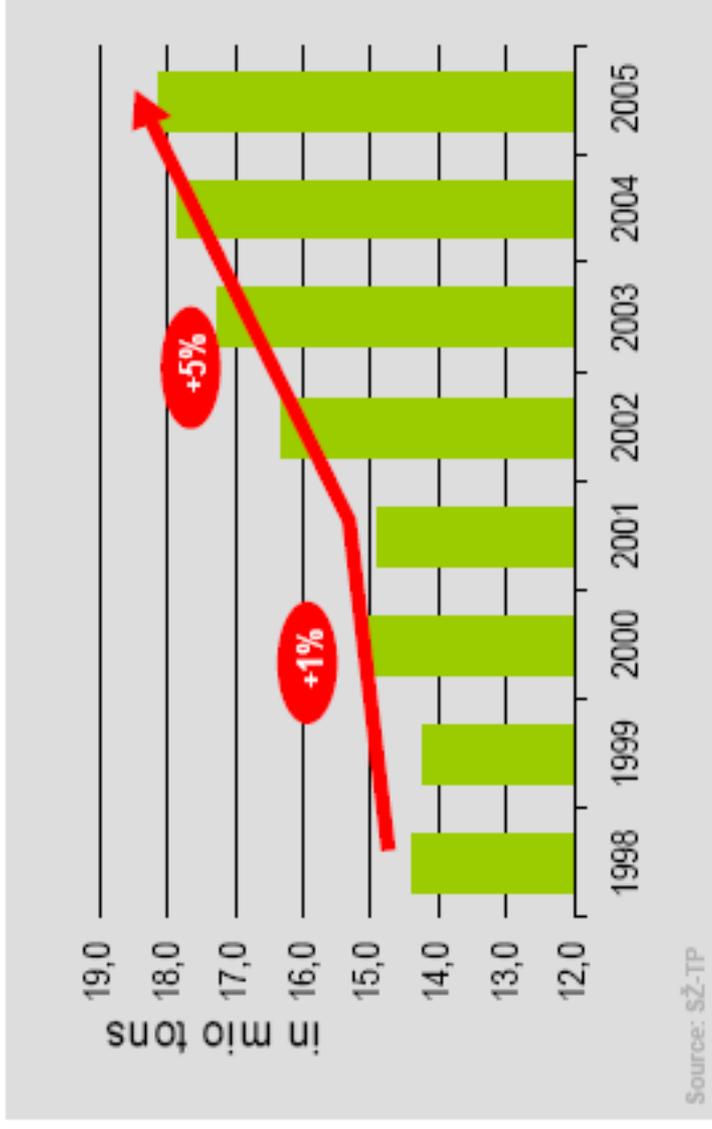
- SŽ-Freight is the largest rail freight transporter in Slovenia
- SŽ-Freight is the largest exporter of services in Slovenia.
- Positive development of transport volume and revenue
- Increased productivity of resources

SŽ-Freight is an offensive rail freight market player on the Corridors 5 and 10



Growing Performance In Freight Traffic

- Market development activities:**
- positioning on key markets in SE Europe
 - development of an operative international sales network
 - development of new block train services in international traffic



SŽ-Freight is significantly increasing the transport volume since 2002



SŽ-Freight Compared With Other European Rail Operators

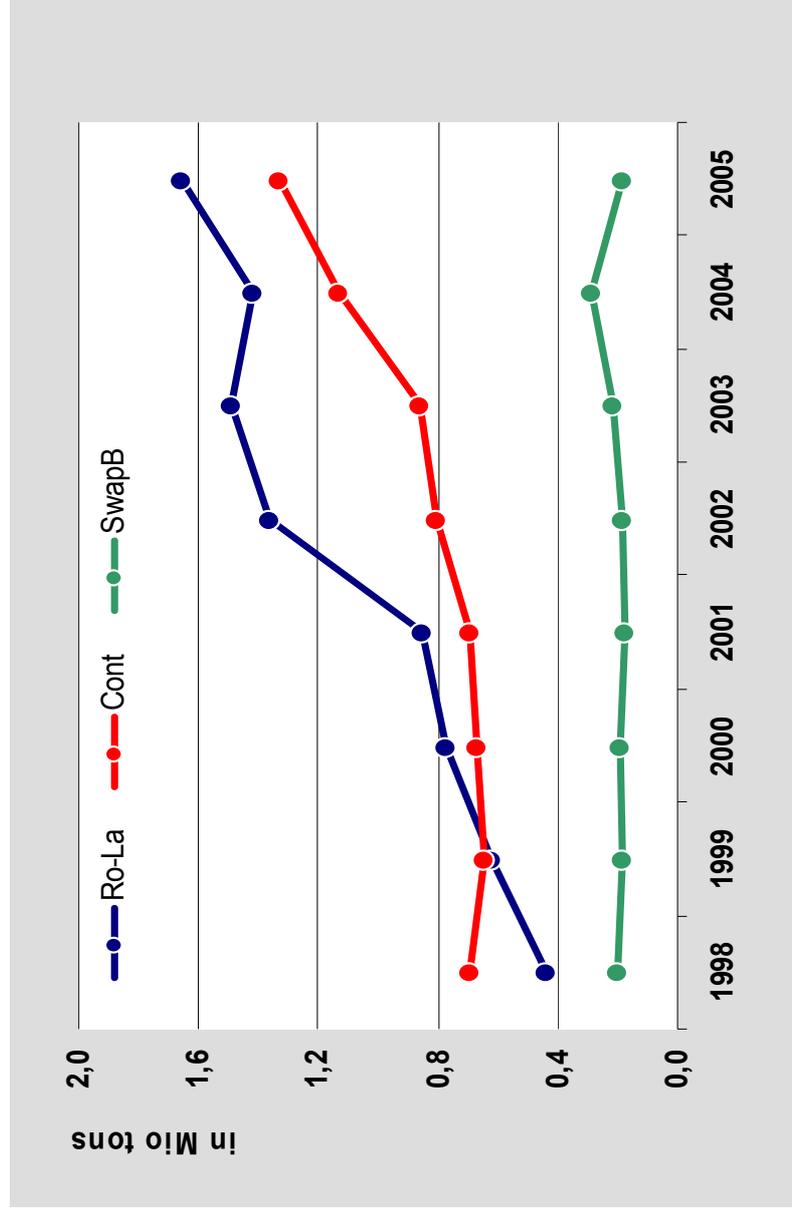




Growing Importance of Intermodal Business

- Intermodal business is one of the fastest growing businesses of SŽ
- Share of the intermodal business (in tons) has increased from **9% (1998) to 18% (2005)**
- Average annual growth rates achieved (2005/2000)

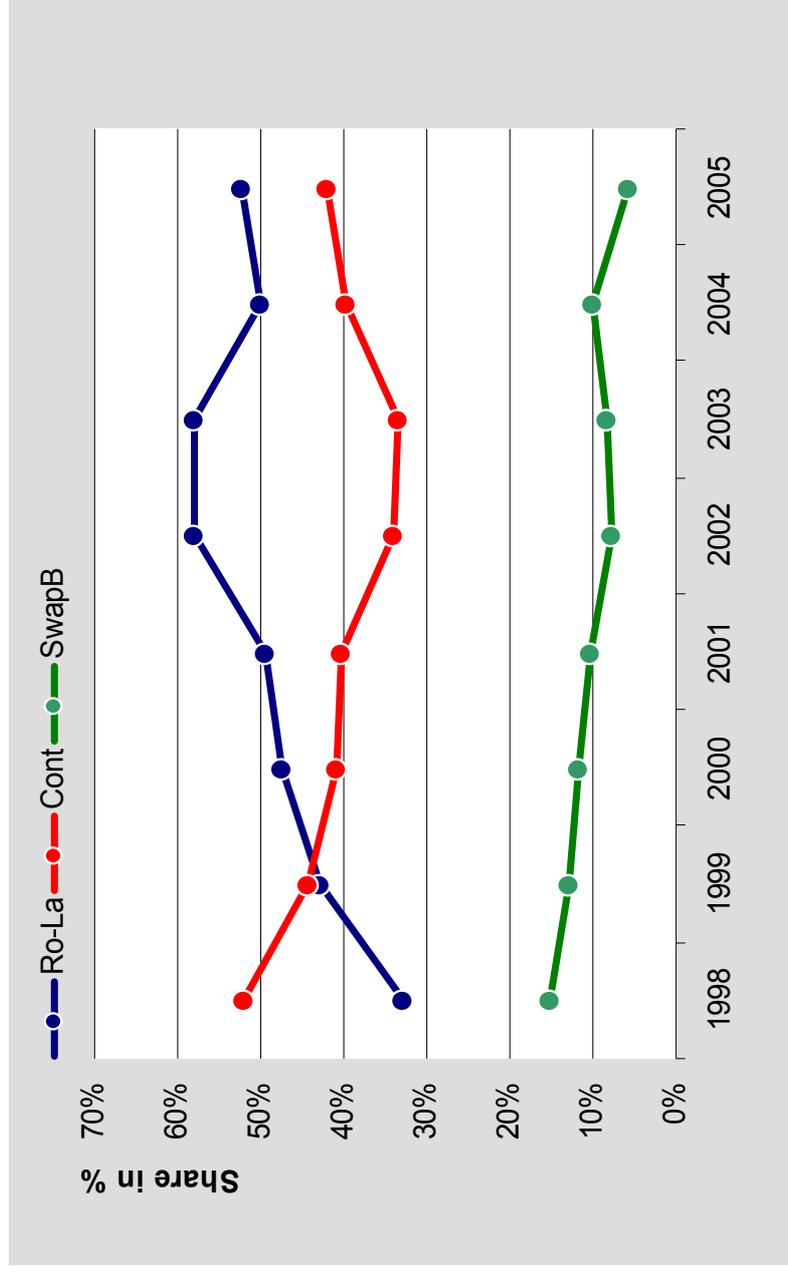
Ro-La 16% p.a.
Containers 15% p.a.





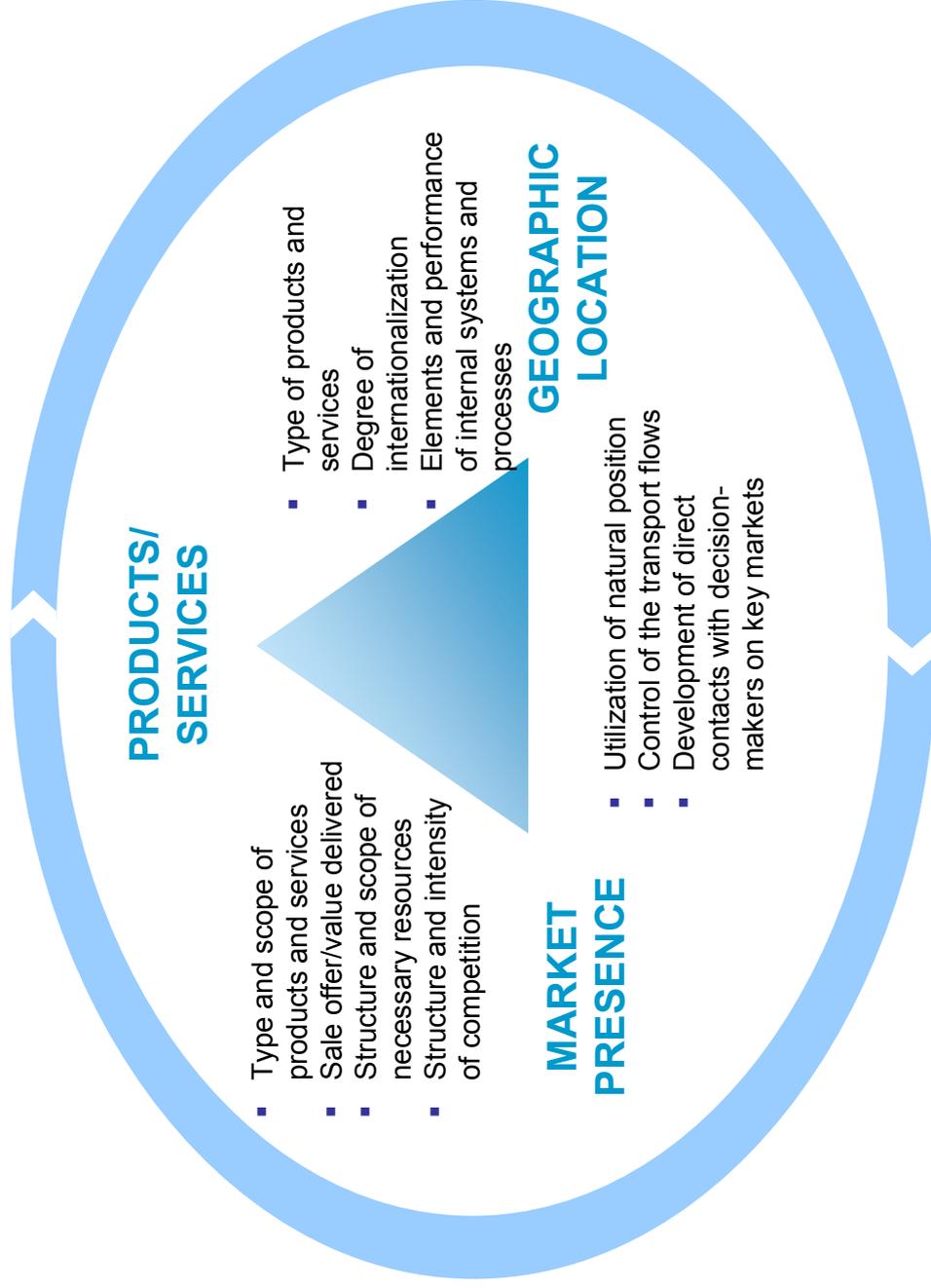
Ro-La and Container Segments Drive the Growth of the Intermodal Business

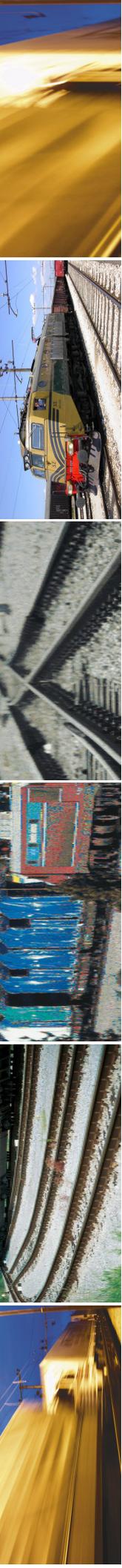
- Share of the Ro-La business exceeds the 50% mark
- After some weaker growth until 2003, container traffic started to develop with impressive dynamic
- New connections in transit and inland traffic stimulate further growth of the intermodal transportation



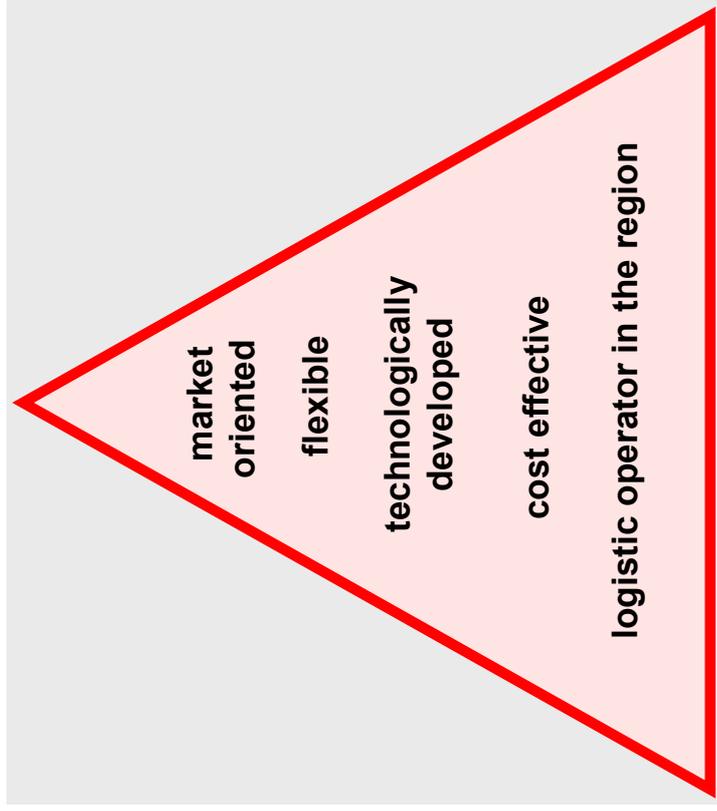


Three Key Strategic elements of SŽ Cargo





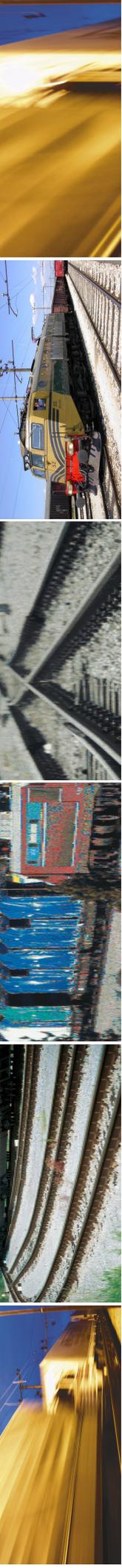
Strategic model of SŽ-Freight



Strategic Orientation

- Building strong market position with new services
- Carrier role, focusing on its key competencies in railway transportation
- Regional leadership, strong market presence in the SE Europe
- Cooperation directed into business development

SŽ-Freight is committed to excellence in its core activities



Investments In The Rolling Stock Are Supporting The Realization Of SŽ-Freight's Strategic Goals



20 new 3-system locomotives (2006-07)

- ➔ ownership of strategic resources
- ➔ flexibility of international rail freight services
- ➔ exploiting long-haul possibilities
- ➔ managing and control over cross-border services

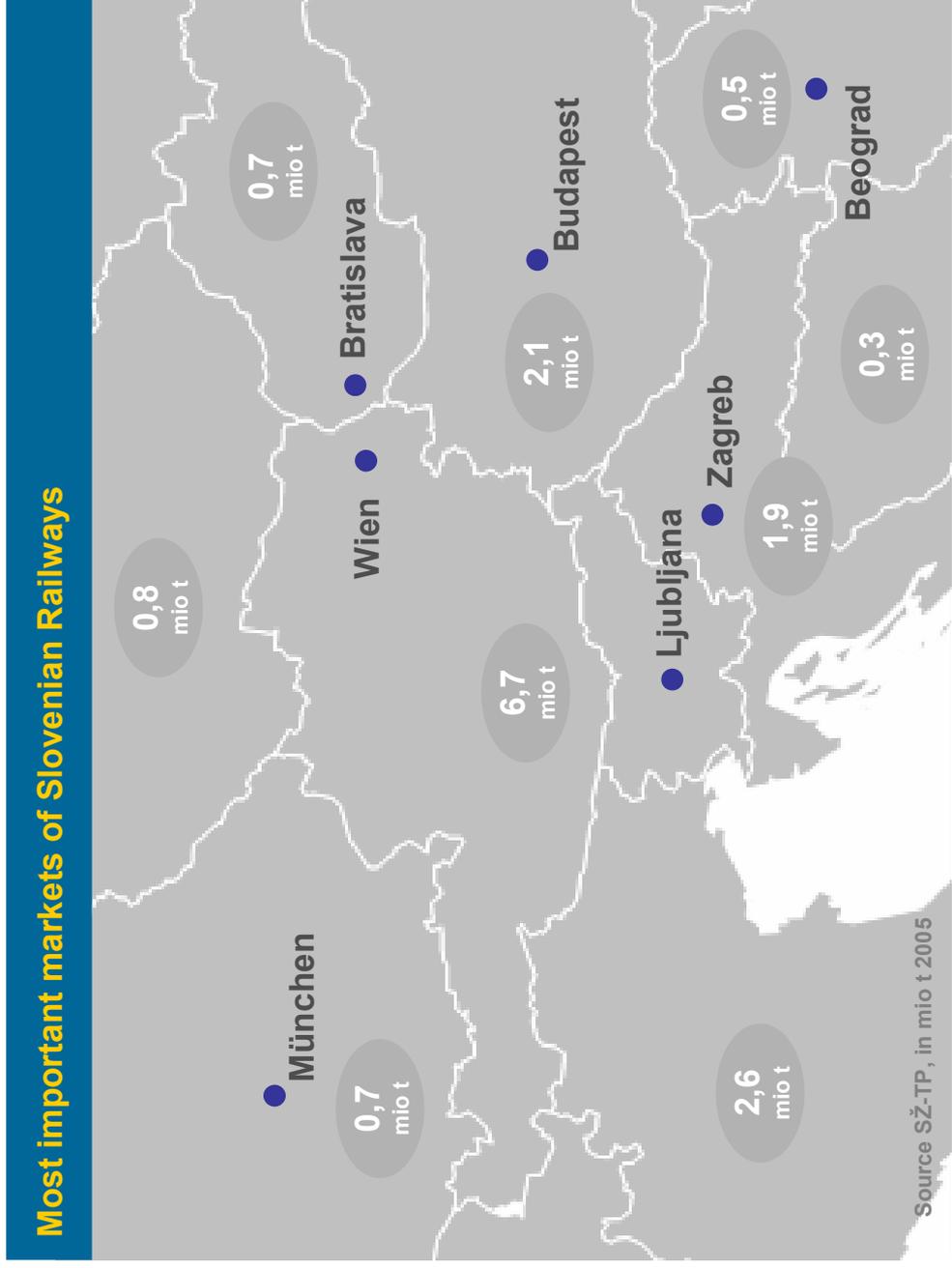
100 new freight wagons (2006)

- ➔ responding to the market demand
- ➔ adapting the wagon fleet structure to the future growth potentials
- ➔ increasing the utilization rate and the cost efficiency of the wagon fleet



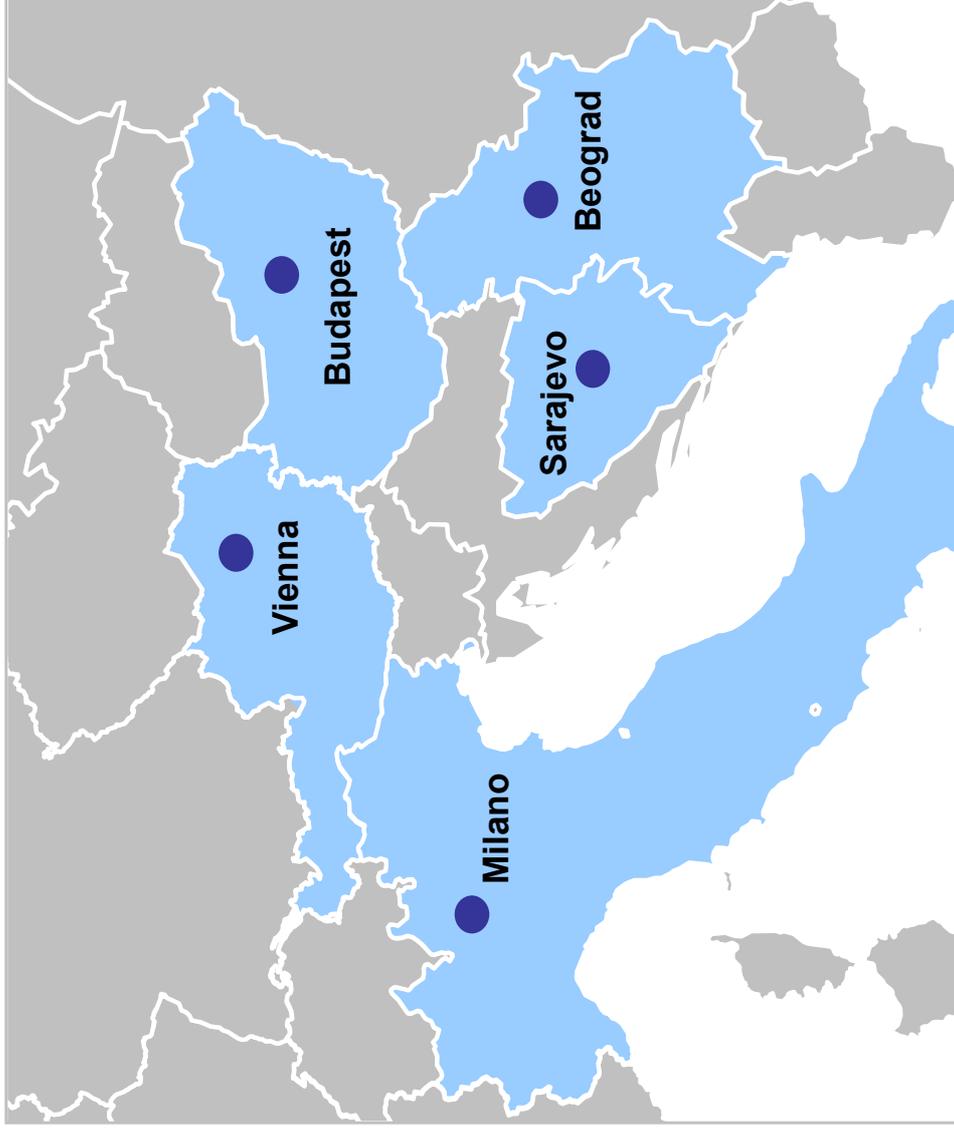


Major Markets of Slovenian Railways





Representative offices of Slovenian Railways



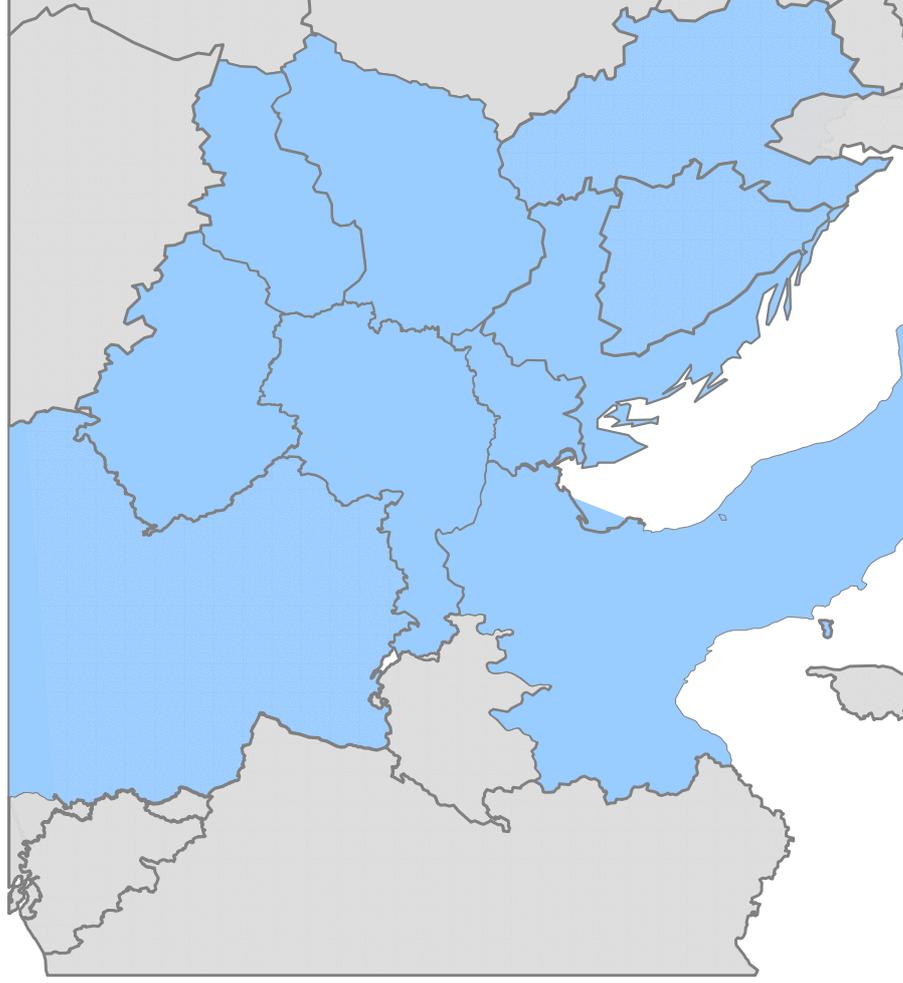
SŽ Cargo is represented with its offices on the key markets of Austria, Italy, Hungary, Bosnia and Serbia.

Main tasks:

- sales support on international markets
- information and operational support to the customers abroad
- market research



International Co-operation of SŽ

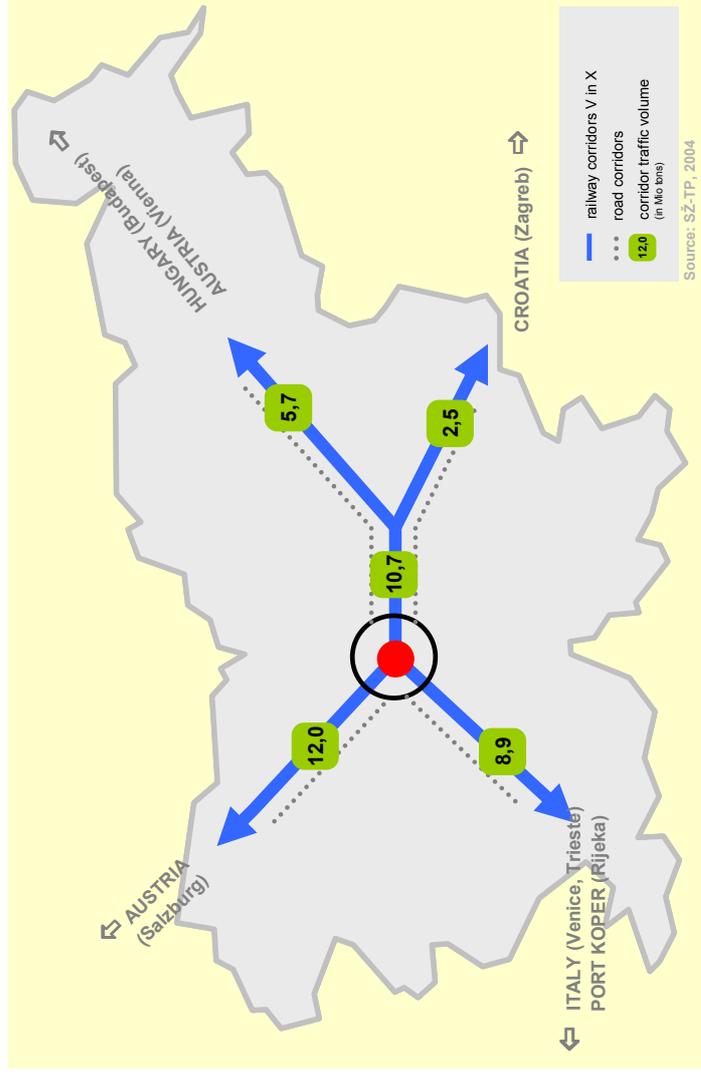


	Production	Sales	Products	IT
ÖBB	●	●	●	●
TI	●	●	●	●
MAV	●	●	●	●
ŽBH		●	●	
HŽ	●	●		
JŽ		●	●	
ZSSK		●	●	
ČD		●	●	
TCDD		●	●	



SŽ-Freight IS Managing The Traffic Flows On Two Corridors

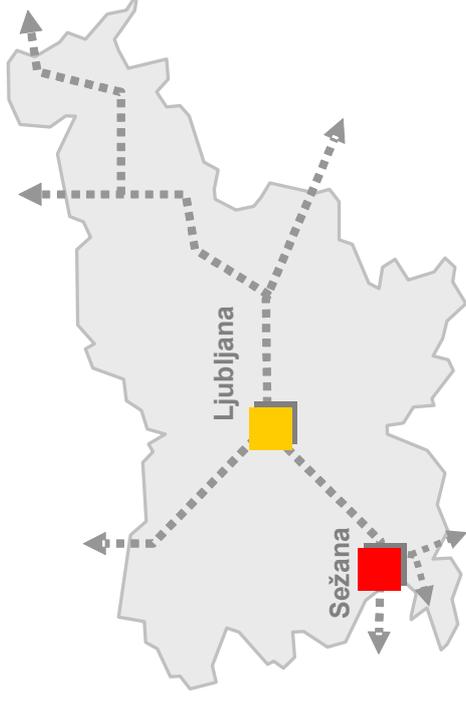
- 90% of the traffic volume handled by Slovenian railways has its origin or destination in other countries
- One half of the transport volume carried are transit traffic volumes
- Managing the transit traffic is of vital importance for further growth of rail freight traffic





Hinterland Terminals (Ljubljana and Sežana/Divača)

Gateway Slovenia	
	● Warehousing
	● Intermodal Terminal
	● Car Terminal
	● Direct Train Formation
	● Additional Logistic Services
Terminal Sežana	
	● Trans-bording (SLO-I)
	● Warehousing
	● Direct Train Formation



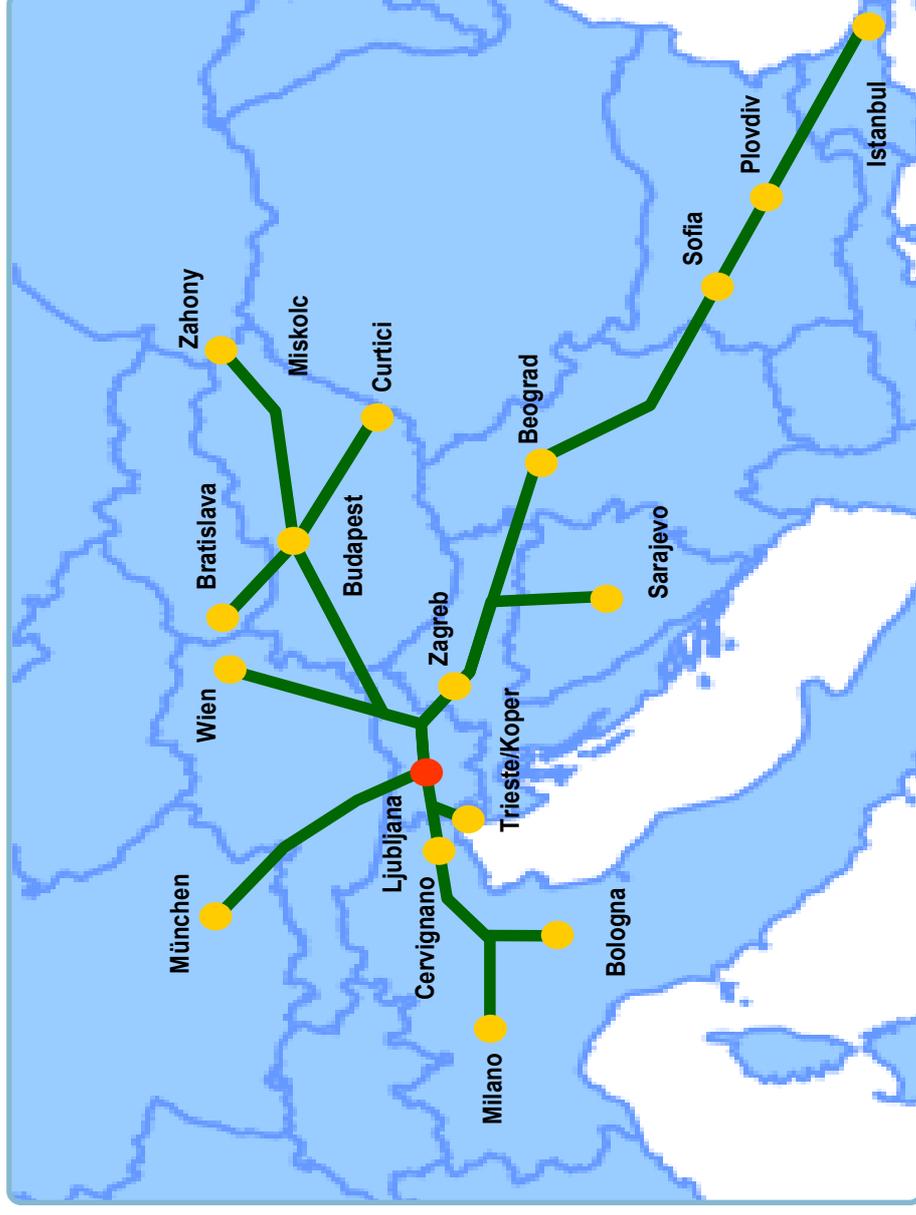
Koper – Ljubljana = 152 km



The Network System of Conventional Products

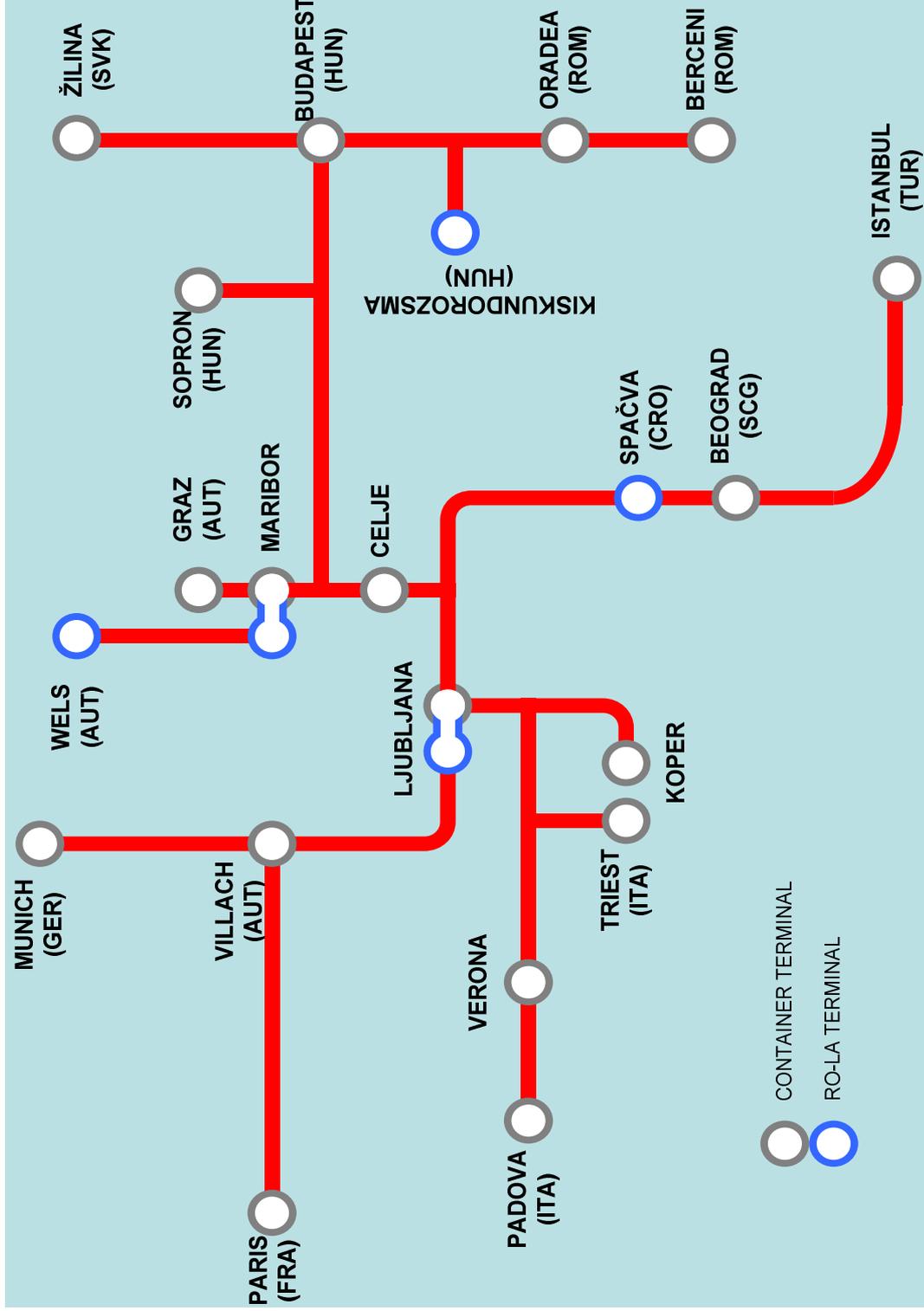
The Network

- **Ljubljana Line**
Munich - Ljubljana
- **East Gate Express**
Milano – Ljubljana
- **East-West Rail Shuttle**
Bologna – Ljubljana
- **Sava Express**
Beograd – Ljubljana
- **East Express**
Istanbul – Ljubljana
- **Curtici - Ljubljana**
- **Miskolc - Ljubljana**





The Intermodal Network





Scenarios of the Rail Freight Traffic Development

- Objective of Slovenian Railways is the achievement of a majority market share in international and transit traffic in the field of conventional and intermodal transportation, as well as transportation of dangerous goods.
- Considering the environmental and energy efficiency of rail transportation, we expect a doubling of the intermodal transportation until 2010.

Scenario 1 - Reference

even increase in intermodal transportation on all relations

Scenario 2 - Zone

increase of intermodal transportation on Alpine and Pyrenean corridors

Scenario 3 - Global

increase of intermodal transportation in the East-West direction



Conditions for the Growth of Intermodal Business of SŽ

- Supporting all technical, operational and commercial solutions increasing the market attractiveness and the utilization of the intermodal trains in Slovenia
- Supporting infrastructural improvements, allowing the use of longer trains and reducing the capacity congestion
- Defining equal and right framework conditions for all transport carriers and modes taking in the consideration the external costs
- Defining fiscal and other measures to stimulate intermodal transportation and to shift the transport system into the direction of modern and economically efficient supply chain solutions.
- Development of intermodal terminals and services



Igor Hribar

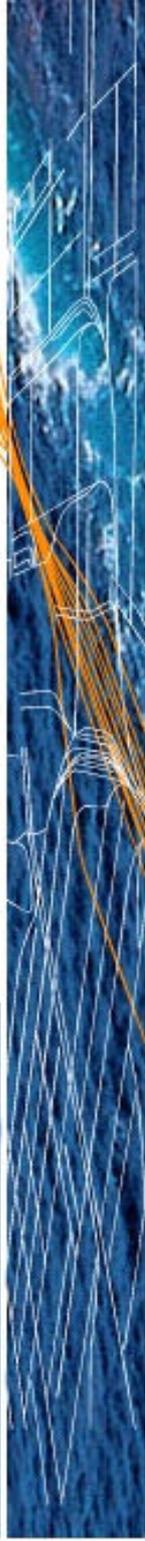
Holding Slovenske železnice d.o.o.
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Thank you for your attention.



Port and Logistic System

Intermodality and future challenges

Content

- **Port services**
- **Maritime and hinterland Connections**
- **Opportunities and development plans**



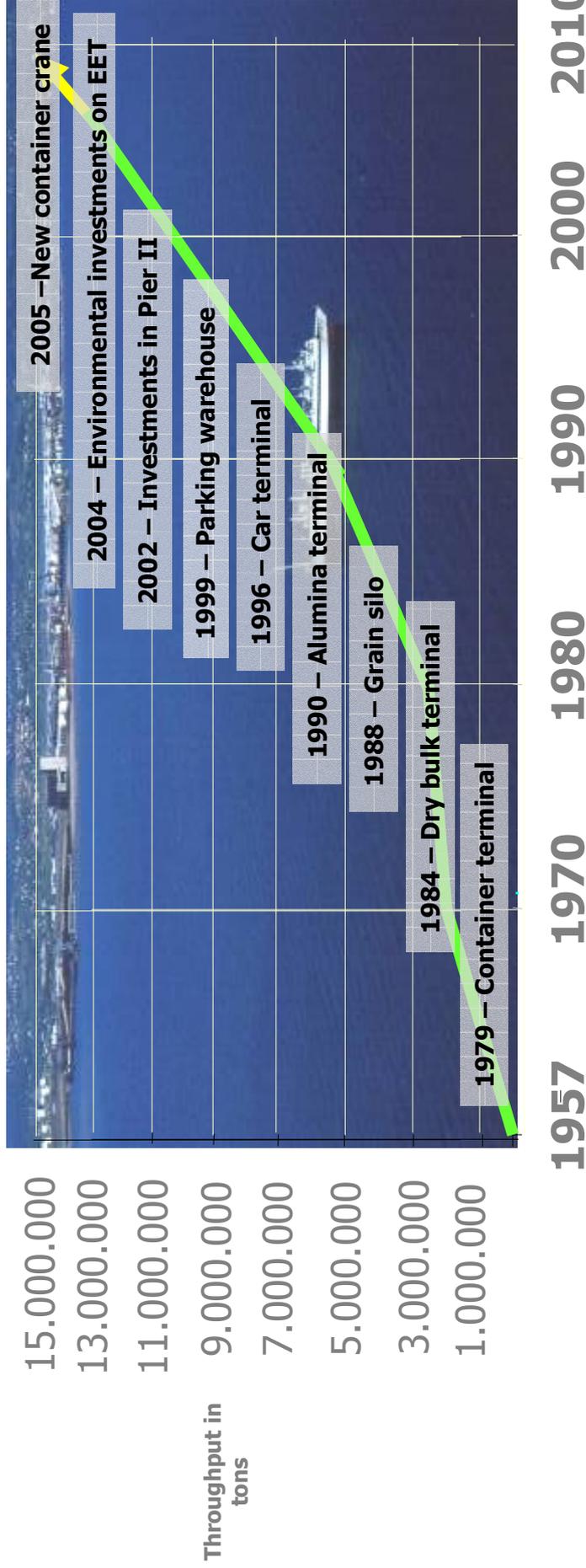
LUKA KOPER



LUKA KOPER

- **Port services**

49 years of growth



Panorama



LUKA KOPER

▪ Total Free zone area	2.549.000 m ²	▪ Quay length	3.134 m
▪ Closed warehouses	221.600 m ²	▪ Railway tracks	30 km
▪ Roofed warehouses	73.400 m ²	▪ Berths	26
▪ Open storage areas	945.000 m ²	▪ Maximum sea depth	- 18 m
▪ Shore tanks	50.000 m ³		
▪ Silo (unique capacity)	81.000 tons		





LUKA KOPER

Luka Koper as a company

Company foundation: **1957**

700 regular employees (+ 300 employees in daughter companies)

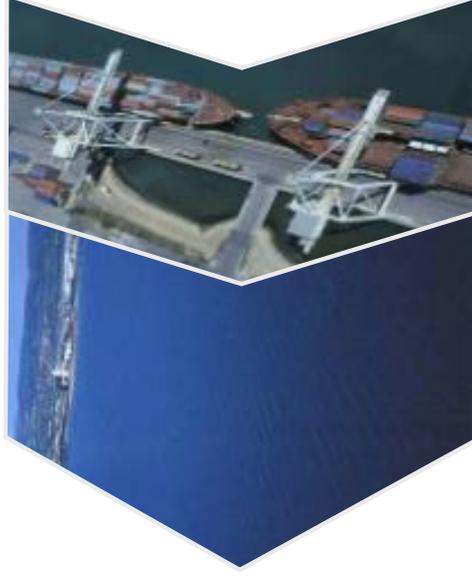
Turnover 2005: **13 mio tons**

Operating revenues 2005: **85 mio EUR**

Status: **P**ublic **L**imited **C**ompany – shares quoted on Ljubljana Stock Exchange

Main Activities:

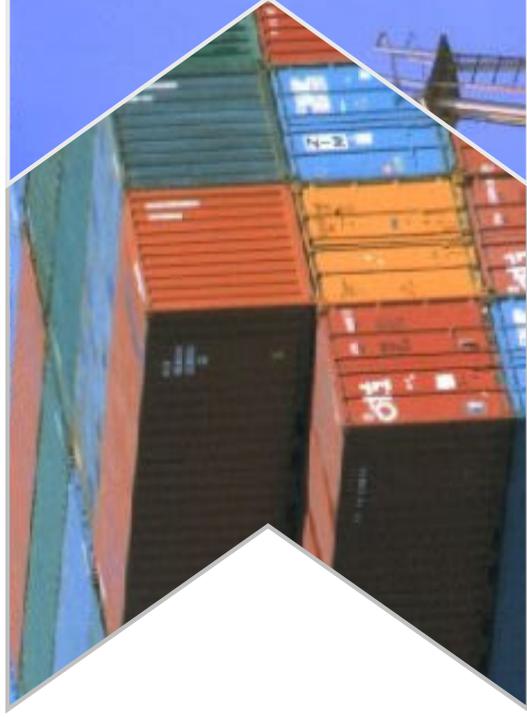
- Terminal operations
- Complete logistic support
- Management of the port area
- Management of the Free Zone





LUKA KOPER

All-purpose port



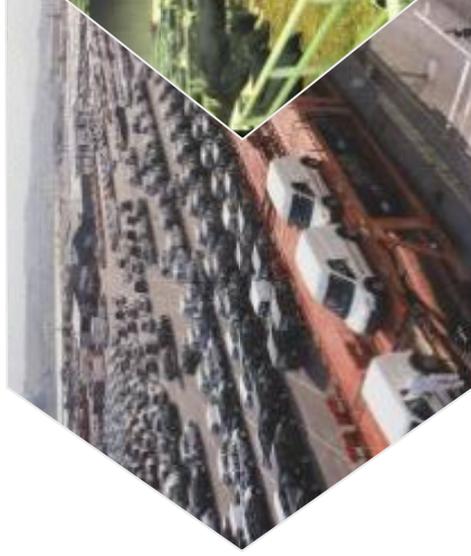
Containers



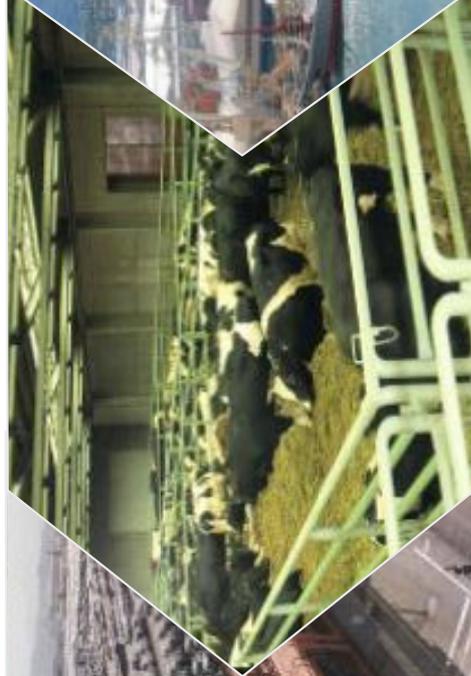
General cargo



Fruit & Vegetables



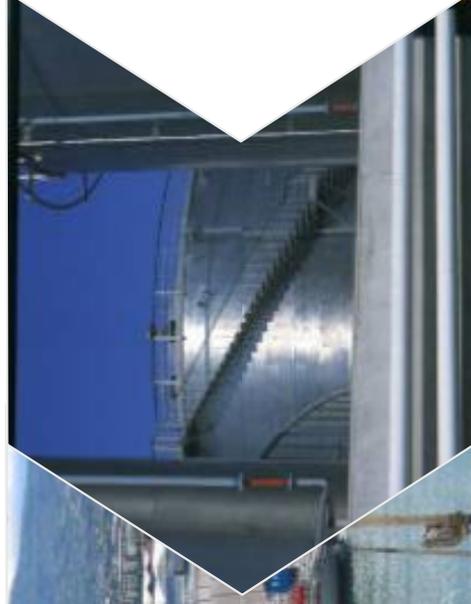
Vehicles



Livestock



Dry Bulk



Liquid Bulk

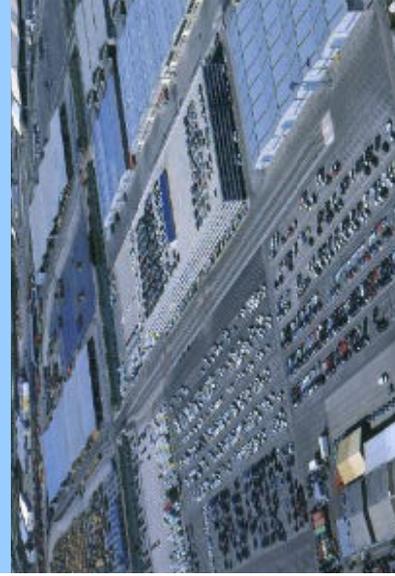


LUKA KOPER

Terminal services



- Ship loading / unloading
- Wagons and trucks loading / unloading
- Warehousing
- Logistics
- Additional services

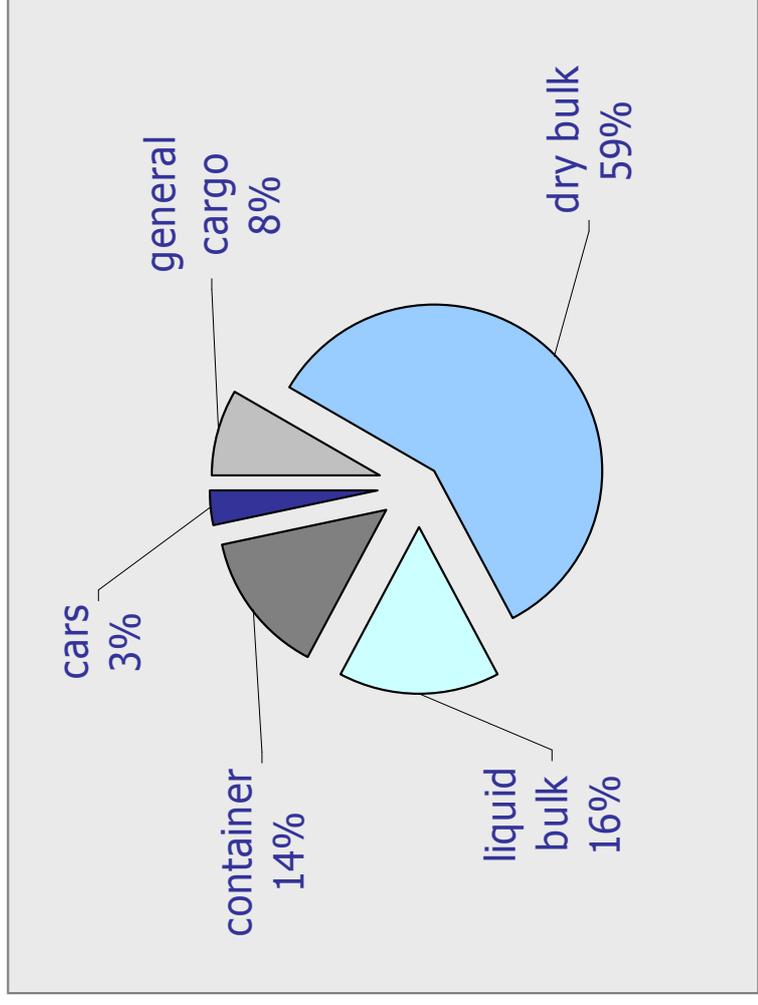




Market and cargo mastering 2005

Total turnover 13 mio tons:

- Slovenia 3,86 mio ton (29,5%)
- Transit 9,20 mio ton (70,5%)





LUKA KOPER

■ **Maritime and hinterland connections**



LUKA KOPER

The role of Koper's Port in the region

BASIC FACT: Geographic position at the intersection of:

- Corridor V and X (land side)
- Adriatic Corridor (sea side)

CONSEQUENCES:

- The only port in Slovenia => strategic national role: attraction of cargo on Slovenian transport route + integrator of logistic activities at the sea / land cross-point
- Crucial generator of revenues and growth of Slovenian transportation business + multiplication effects on other (domestic and foreign) sectors
- Above average added value activity => 1 worker in our maritime sector creates nearly double added value than an average worker in our Coastal region
- Important also for hinterland markets (in further economic expansion)



Inland connections

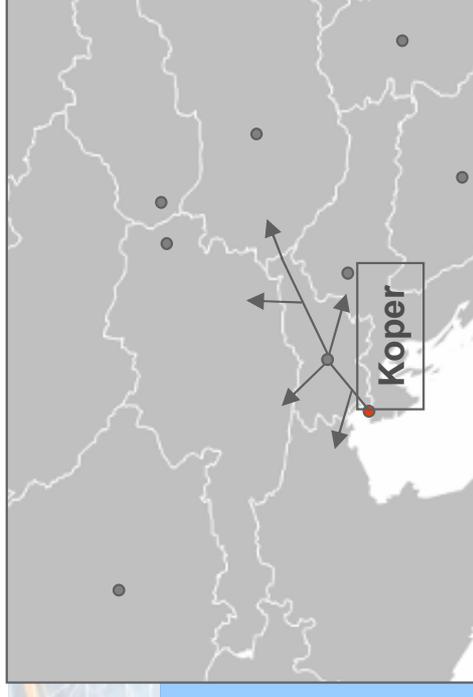
Efficient **ROAD** infrastructure:

- direct Motorway access till the port area – new entry avoiding the city traffic
- Connection with the European Network

Highly depending on **RAILWAY**:

- 60 % of total throughput is using Railway (EU25 average is 18%)
- 50 % of container traffic is using Railway
- Short term project: modernization of some shunting stations (+ 30% of railway capacity)
- Long term project: New double-rail-track Koper – Divača

Regular trains



SLOVENIA:	KP - LJ - MB (Adria Kombi) KP – LJ (Adria Kombi)	daily block train daily shuttle train
HUNGARY:	Budapest (ICF) Budapest (ERS-Maersk) Budapest (Adria Kombi) Budapest (Metrans)	6 block trains / week 1-3 train / week 3 trains / week 1-2 trains / week
AUSTRIA:	Graz (ICA Interliner)	weekly block train
SLOVAKIA: from end 2006	Žilina (Glovis /Adria Kombi, ZSSK Cargo)	daily block train
CROATIA, SČG:	Beograd (Adria Kombi)	3 trains / week (from LJ)
ITALY:	Verona (QE)	2 shuttle trains / week (from LJ)
GERMANY, BENELUX:	München (Adria Kombi)	daily block train (from LJ)

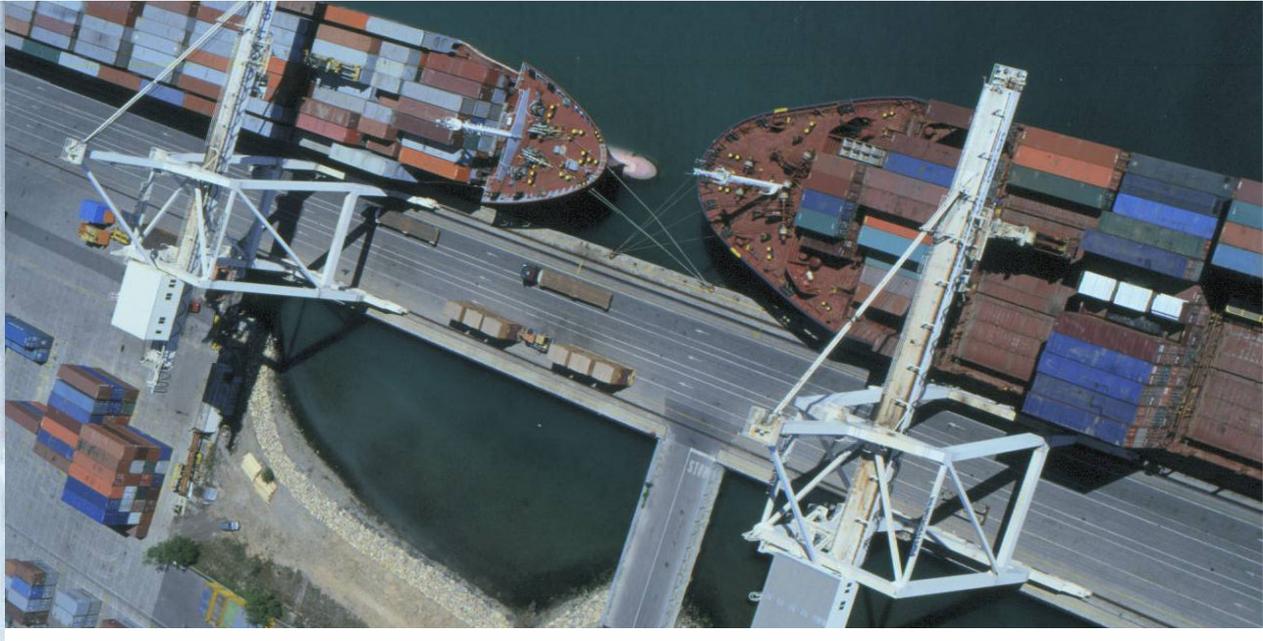
All other destinations are covered with daily single wagon service.



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Container shipping lines services

- Far East
- Mediterranean
- Piraeus
- Gioia Tauro
- Gioia Tauro
- Gioia Tauro
- Malta
- Malta
- Egypt
- Napoli
- Levant
- EMC-LT-CMA
- Grimaldi
- MSC
- MCL
- Lošinjska plovidba
- X-Press
- UFS
- IRISL
- ECL
- COSCO
- Sermar Lines



In total more than 30 carriers are "selling" Koper



SSS and MOS

- **Important projects** for our future business development:
 - Looking for feasible routes / partners (promotion)
 - Involvement of complex port logistics and adequate infrastructure, depending on: new port investments, new regulation of port traffic, high integration with other suppliers, IT support etc.
- **Some attempts with Marco Polo:**
 - block train Graz-Vienna-Bratislava (2004) - rejected
 - connection with Barcelona (2005) – awaiting results
 - new ideas for 2006!!!



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- **Opportunities and development plans**



LUKA KOPER

Vision and development orientations

Vision: Luka Koper leading port and logistic system for Central Europe

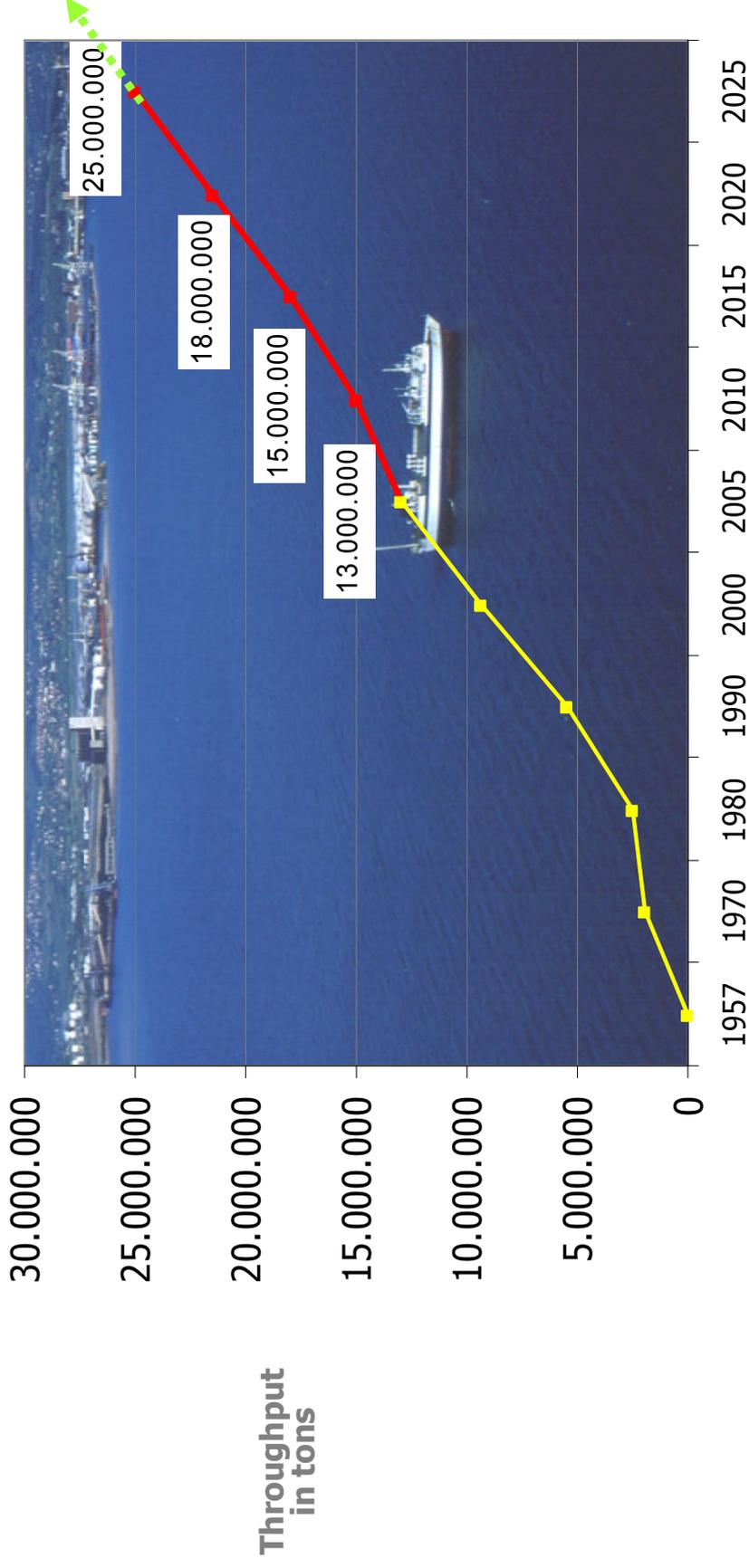
- **Complete logistic support** (service integration with other providers) for a more competitive transport route via Koper
- **Distribution center** and value added activities
- **New terminals** on other locations





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Future throughput estimation



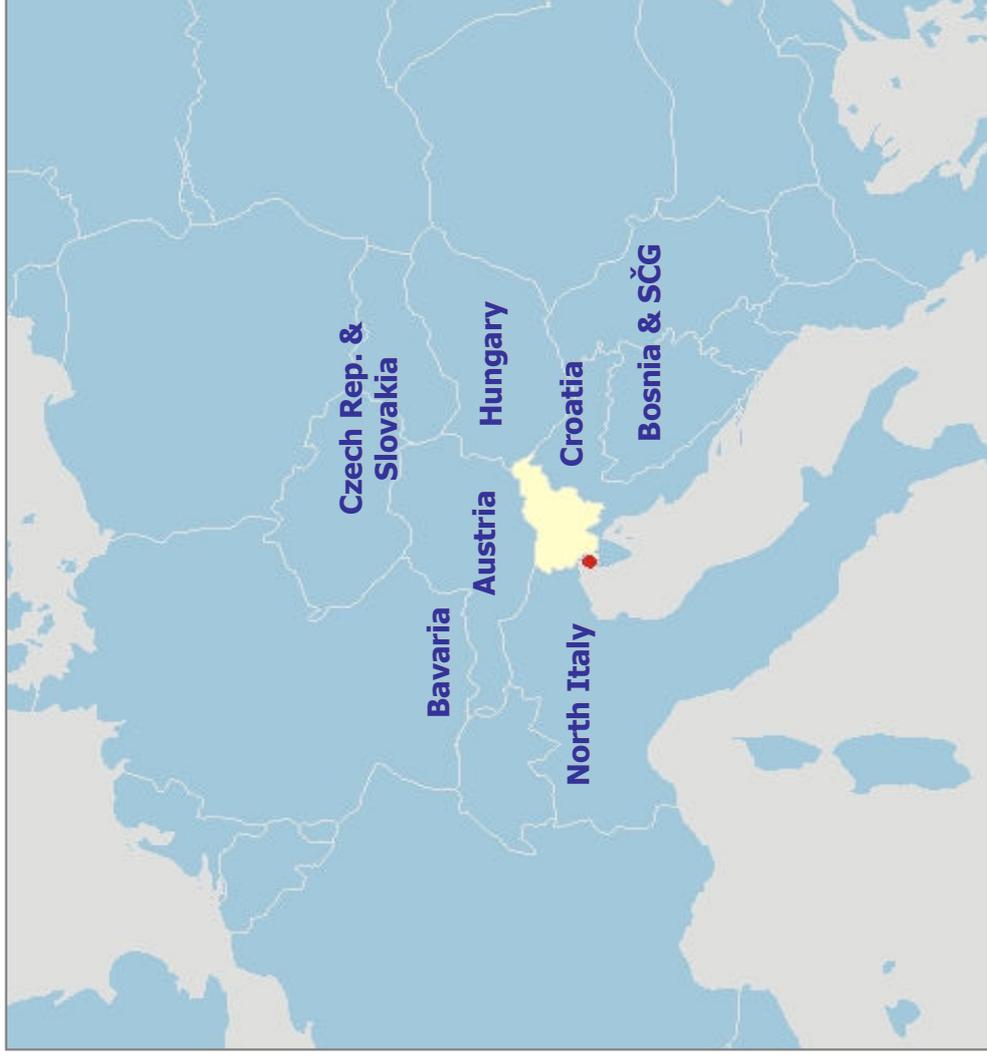
Main infrastructure conditions:

- new double rail-track till Koper
- Pier III for 1 mio TEU (multimodal terminal)



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Market potential in TEUs

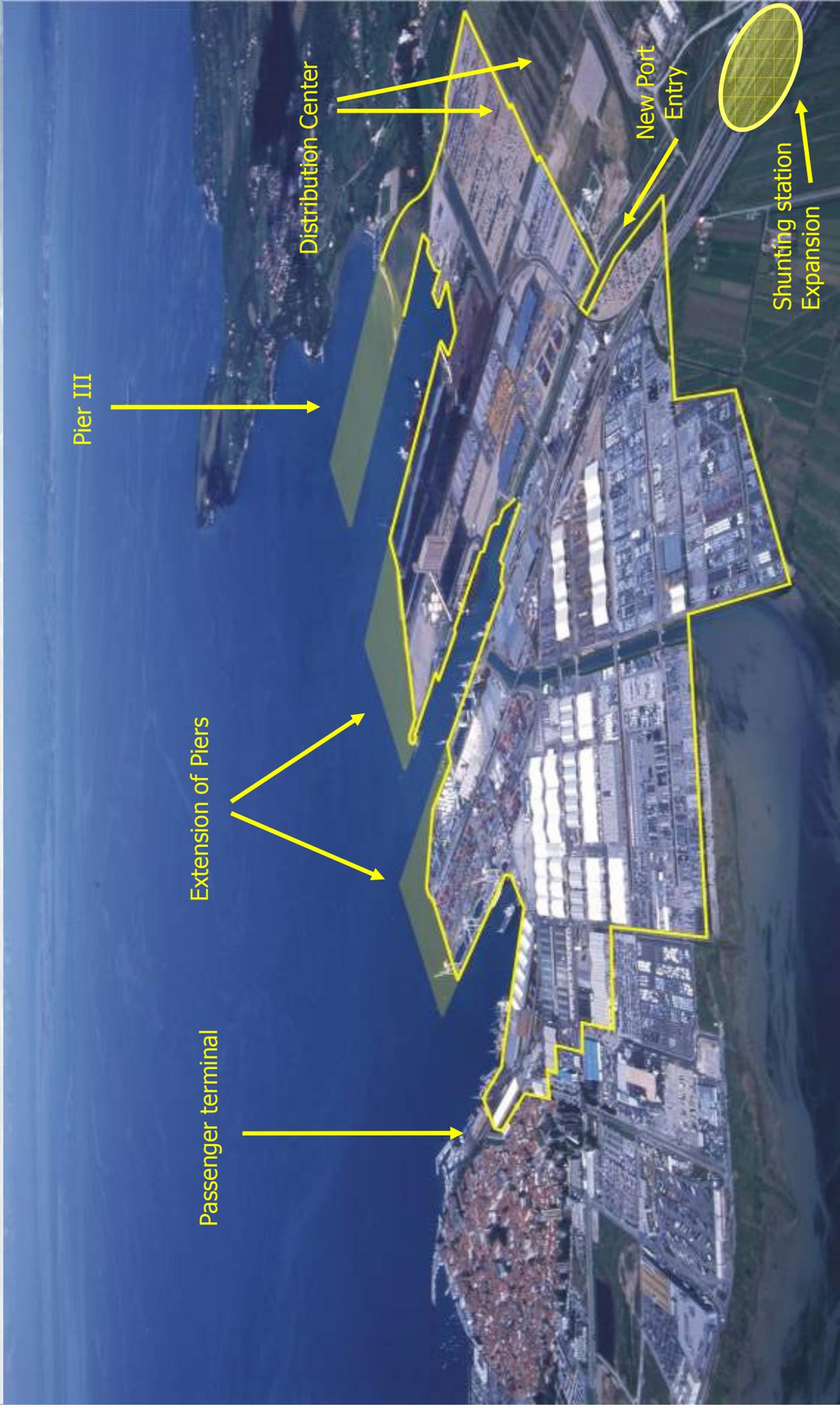


Country	Volume
Slovenia	90.000
Hungary	150.000
Austria	400.000
North Italy	300.000
Bavaria	300.000
Croatia	30.000
SČG & Bosnia	30.000
Czech Rep. & Slovakia	300.000
TOTAL	1.600.000



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Spatial development projects



Pier III

Extension of Piers

Passenger terminal

Distribution Center

New Port
Entry

Shunting station
Expansion

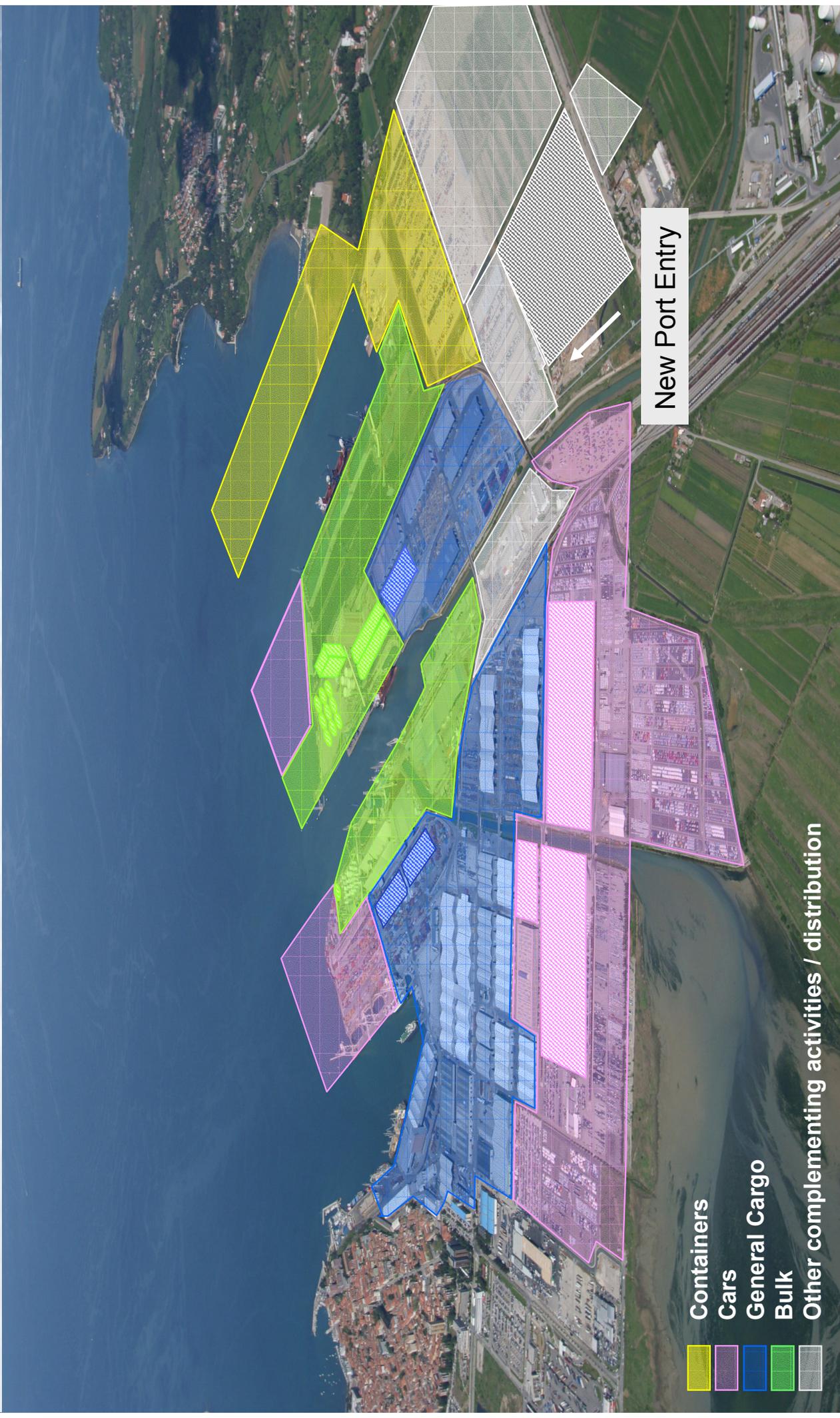


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Current view of cargo groups allocation



Future Projects



Containers
Cars
General Cargo
Bulk
Other complementary activities / distribution



LUKA KOPER

Thank you!

Project SINGER

SINGER Project team

presented by Mr. Janez Merlak

Commitment of the partners

- Cemat, Italy
- Hungaria Intermodal, Hungary
- Kombiverkehr, Germany
- Slovenske železnice, Slovenia
- UIRR, Belgium
- Adria kombi, Slovenia

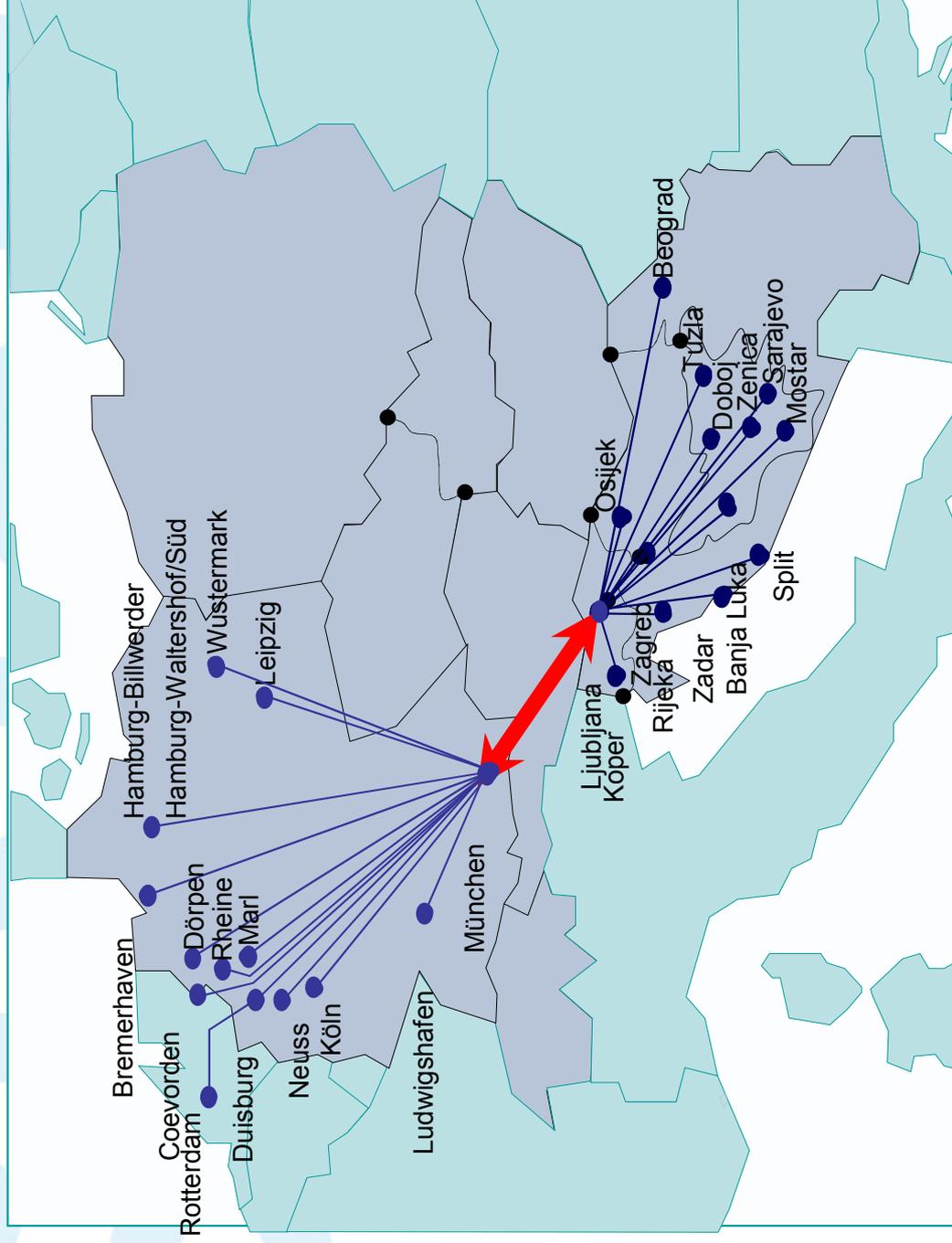
SINGER features

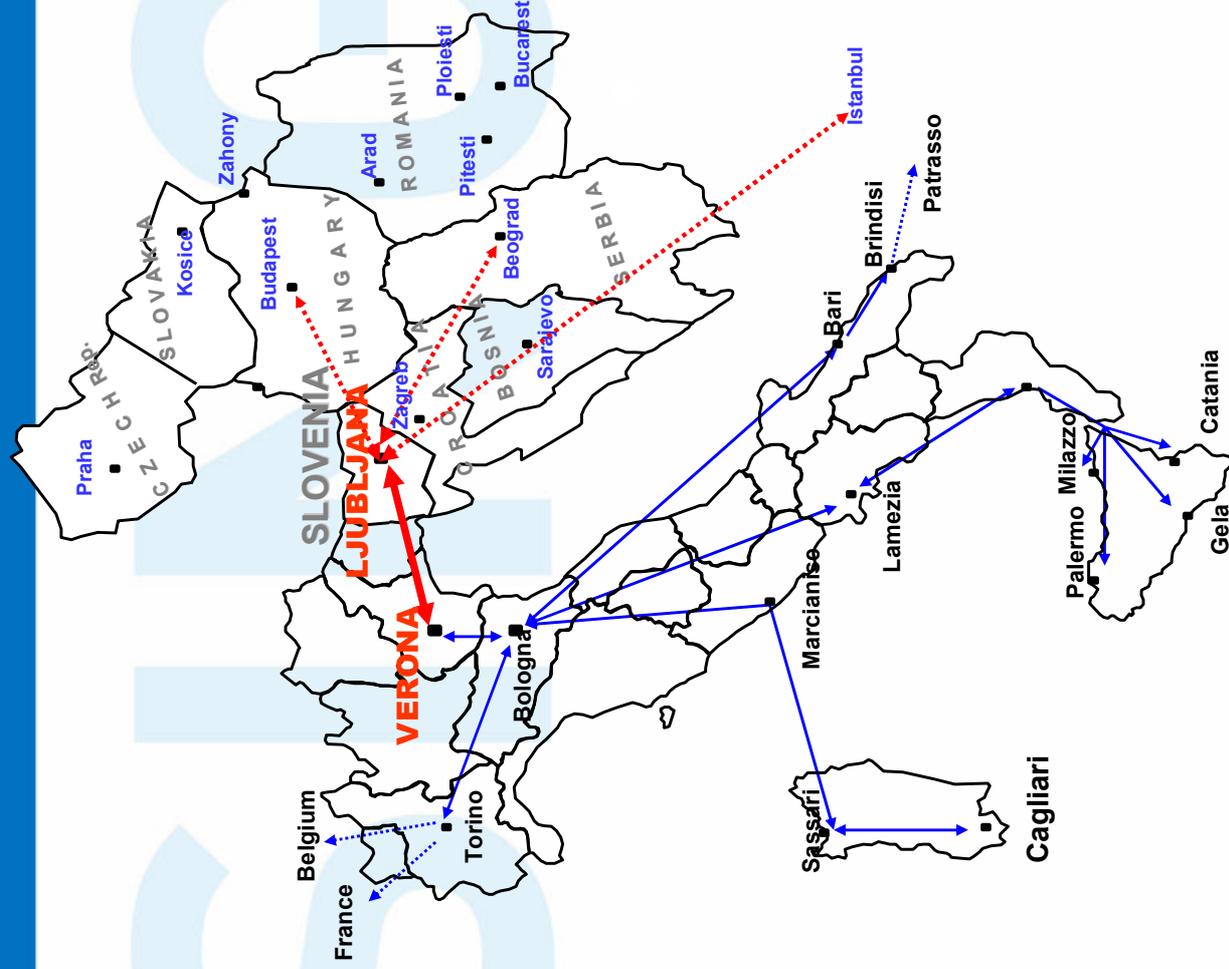
- Intermodal Shuttle and Block-train lines
- Reliable, efficient and competitive service
- Know-how in Combined transport bussiness
- Connection of the regional hubs:
 - München Riem Ubf
 - Verona Quarante Europa
 - Budapest BILK
 - Ljubljana KT
 - Port of Koper CT

Gateway concept



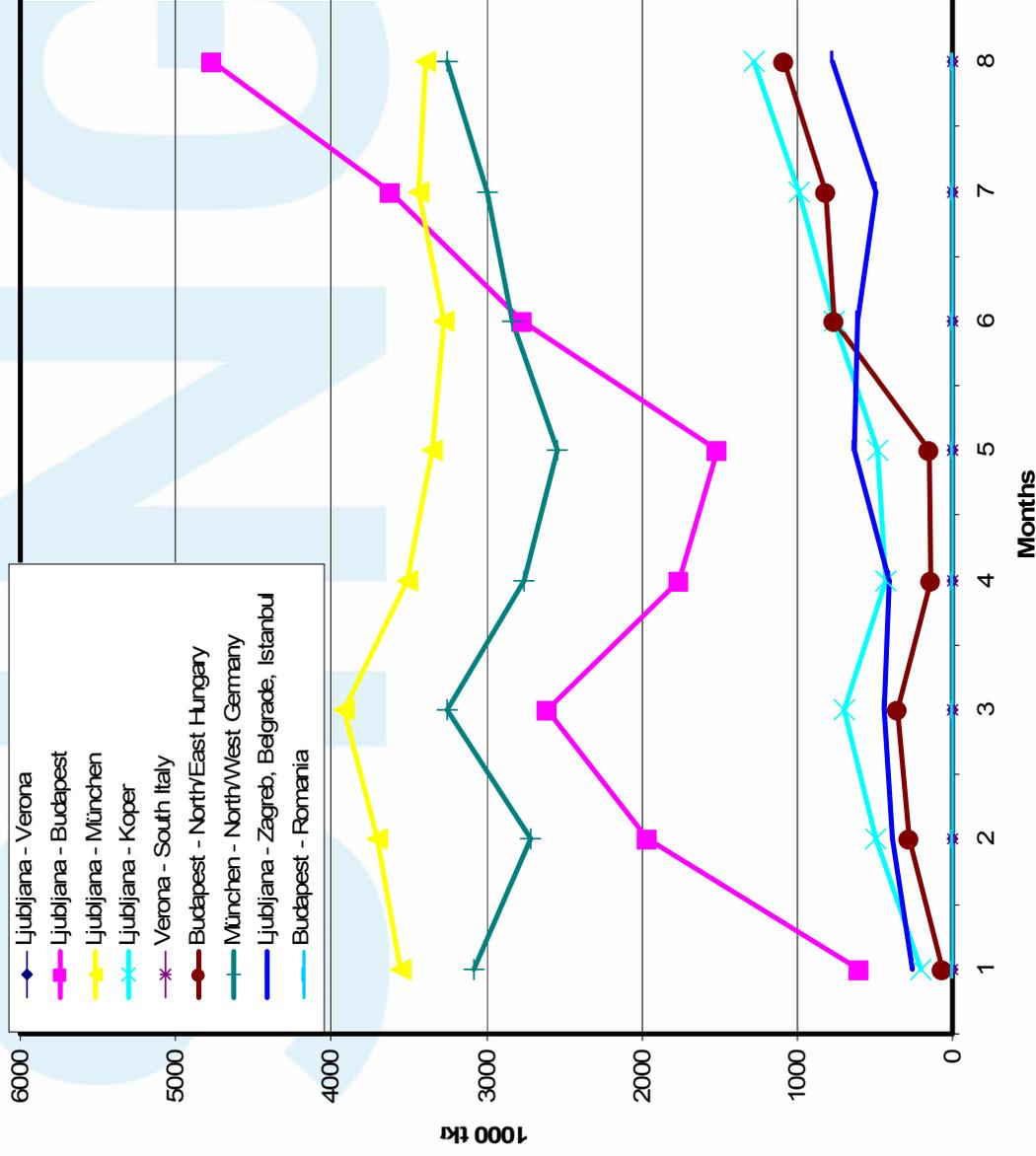
North - South





East - West

Volumes achieved on SINGER lines in 8 months (in 1000 tkm)



Line	Dist. km	All years 1000 tkm Total
Ljubljana - Verona	346	0
Ljubljana - Budapest	537	19601
Ljubljana - München	427	28127
Ljubljana - Koper	152	5334
Verona - South Italy	716	0
Budapest - North/East Hungary	226	3656
München - North/West Germany	500	23430
Ljubljana - Zagreb, Belgrade, Istanbul	113	4013
Budapest - Romania	321	0
All lines	Total	84161

Reliable Service

- Shuttle and block train lines with fixed time-tables
- Service that brings the cargo from one part of Europe to the other without changing of the transport mode in acceptable time

Efficient Service

- The partners provide together a smooth operation and administration that is user friendly
- The lines that are interconnected in Ljubljana KT are programmed in the manner that no time is lost by transshipments from one train to another
- All trains are linked to the regional networks (Nodo Italia, Kombinez 2000, Hungarian antennas, Adria kombi Network)
- The transport data is transferred electronically between partners to ensure the information on-time

Competitive Service

- Combined transport service that is competitive to road transportation:
 - Traction prices
 - Frequency
 - Availability and capacity
 - Transit-time
- One-stop-shop for the clients
- Same procedures at all CT Terminals

Project SINGER

EC supports the idea. We are going to prove they made a right decision.

Project partners



Project SINGER

Thank you for your attention.

Slovenian Intermodal Gateway to European Rail

SINGER

SINGER

Press Conference



CEMAT

