



06.09.2012 RTI (Returnable - Reusable Transport Items) standardization and ECR Baltic Supply Chain Directors meeting at Riga Food

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AGENDA part 1

14:30 Registration

14:40 - 15:10 Introduction (ECR Baltic supply side working stream updates: EUR Pallets assessment, RTIs, SC KPIs, Other) by Edgars Pentjuss, ECR Baltic

1. Crates unification vision:

1.1 Moving to the **standard crates in meat & dairy flows in all Baltic market**. Other flows possible.

1.2 Specification and range of crates developed and agreed between suppliers and retailers.

1.3 Generic crate specification (sizes), not owned by any solution provider, please refer to ECR Baltic recommendations

15:10 - 15:40

2. Presentation from retailers: what today's challenges we have with crates and what are the expectations for future

2.1 **RIMI** , 2.2 Others: **Palink, Maxima**

AGENDA part 2

15:40-16:10 Presentation from solution providers maximum 15 mins each

- Ifco Systems Austria GmbH, K. Hartwall Oy Ab, Baltic Pallet Pooling (Polymer Logistics) ,
BEPCO OU

Benefits for suppliers in using standardized crates

3.1 Business case

3.2 Suggestions what to do with old crates: a) public buying price + rental costs for new crates for fixed contract (2 or 3 years); b) public rental price without buying old crates; c) any other solution

3.3. Agreed pilots with specific Baltic dairy suppliers and specific dates

16:10 - 16:30 Coffee break

16:30 - 17:00 Solution providers presentations continued...

17:00 - 18:00 Discussion

4. Discussion: possible implementation best fitting for suppliers and retailers

4.1 Possible model: pooling, renting crates, buying crates? Is washing service needed?

4.2 All crates at once, or to start with smallest (from replacing carton)?

4.3 Possible starting dates?

18:00 Closure and summary of the meeting

Who we are today, here:

Fresh food manufacturers, Retailers, Wholesalers, Distributors, Associations, solution providers and packaging manufacturers:

Rimi Baltic

Palink

Maxima

Container Centralen

Ifco Systems Austria GmbH

K. Hartwall Oy Ab

Bepco

Schoeller Arca Systems

BFGS

Chep

Rodos

EPAL

Baltic Logistic Solutions

Žemaitijos pienas

Pieno Zvaigzdes

Rokiskio pienas

Vilniaus paukstynas

Cido grupa

Aldaris

Mūsmāju dārzeni

Unilever Baltic LLC

Latvijas Pārtikas Uzņēmumu

Federācija

Antitrust and Competition Law Caution

ECR Baltic will not enter into any discussion, activity or conduct that may infringe, on its part or on the part of its members and participants, any applicable competition laws. By way of example, members and participants shall not discuss, communicate or exchange any commercially sensitive information, including non-public information relating to prices, marketing and advertisement strategy, costs and revenues, trading terms and conditions and conditions with third parties, including purchasing strategy, terms of supply, trade programs or distribution strategy. This applies not only to discussion in formal meetings but also to informal discussions before, during or after meetings.

Message to new members, participants and/or people taking part for the first time: Please note that taking part in ECR Europe's and ECR Baltic activities is subject to having read and understood ECR Europe's EC Competition Law Compliance Program. If you have not done so, please do so now. <http://www.ecr-baltic.org/f/docs/clcp.pdf>



ECR Baltic members:





What is ECR?

ECR Baltic is an Efficient Consumer Response Initiative in Estonia, Latvia and Lithuania.

ECR Baltic is a **collaborative retailer-manufacturer platform** with a mission “to fulfill consumer wishes better, faster and at less cost”. It is a non-profit organization which aims to help retailers and manufacturers in the FMCG sector to drive supply chain efficiencies and deliver business growth and consumer value.

ECR Baltic is a member of ECR Europe:

<http://www.ecr-europe.org/>

Since November 2010, ECR Europe is the regional platform for collaboration of the [Global Consumer Goods Forum](#).

Uniqueness: Only European platform for value chain co-operation on a parity basis between brand manufacturers and retailers.

ECR mission and objectives?

Collaboration

Consumer focus

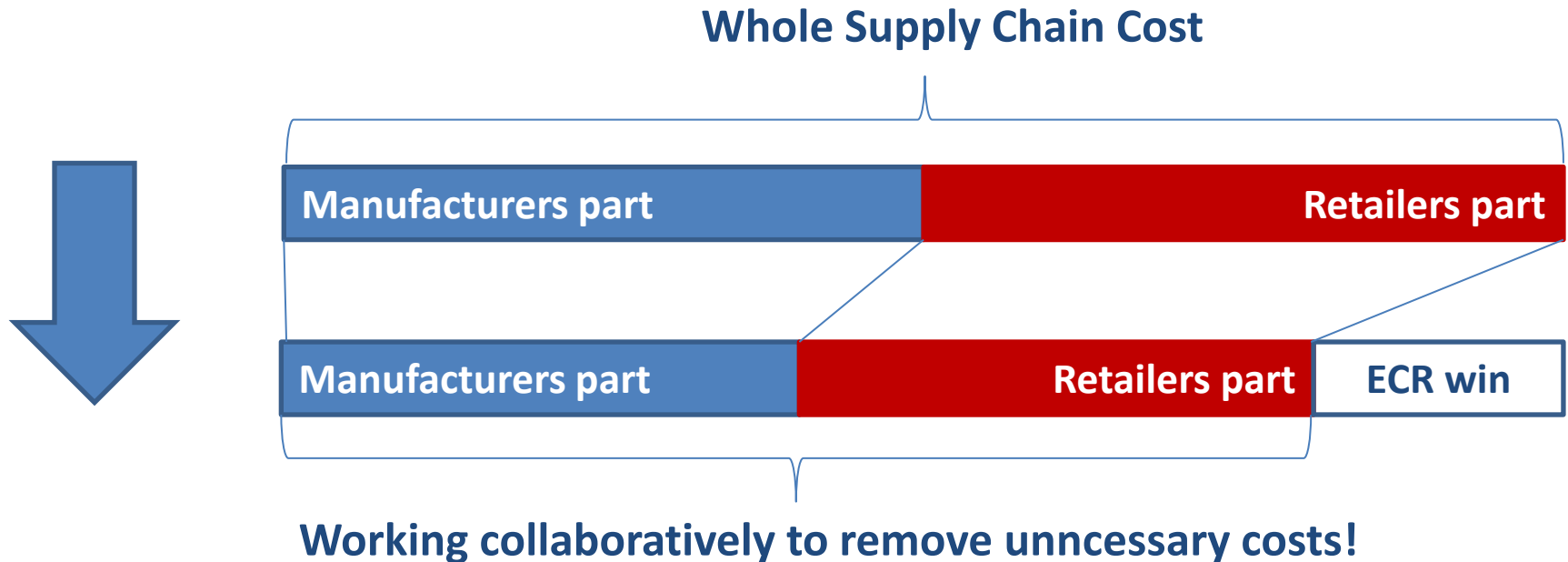
**Working together to fulfil consumer wishes better,
faster and at less cost**

supply chain efficiency

**with a shared business process leading to
shared benefits across the value chain.**

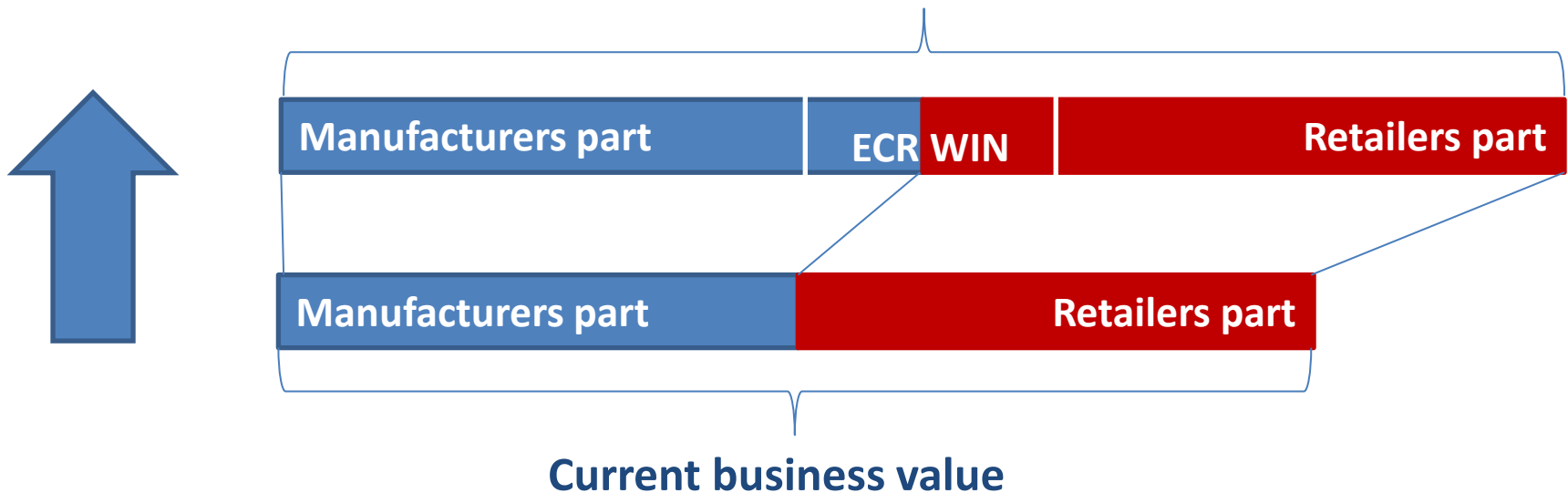
Win - Win

How does ECR work on supply side? Cutting Costs!

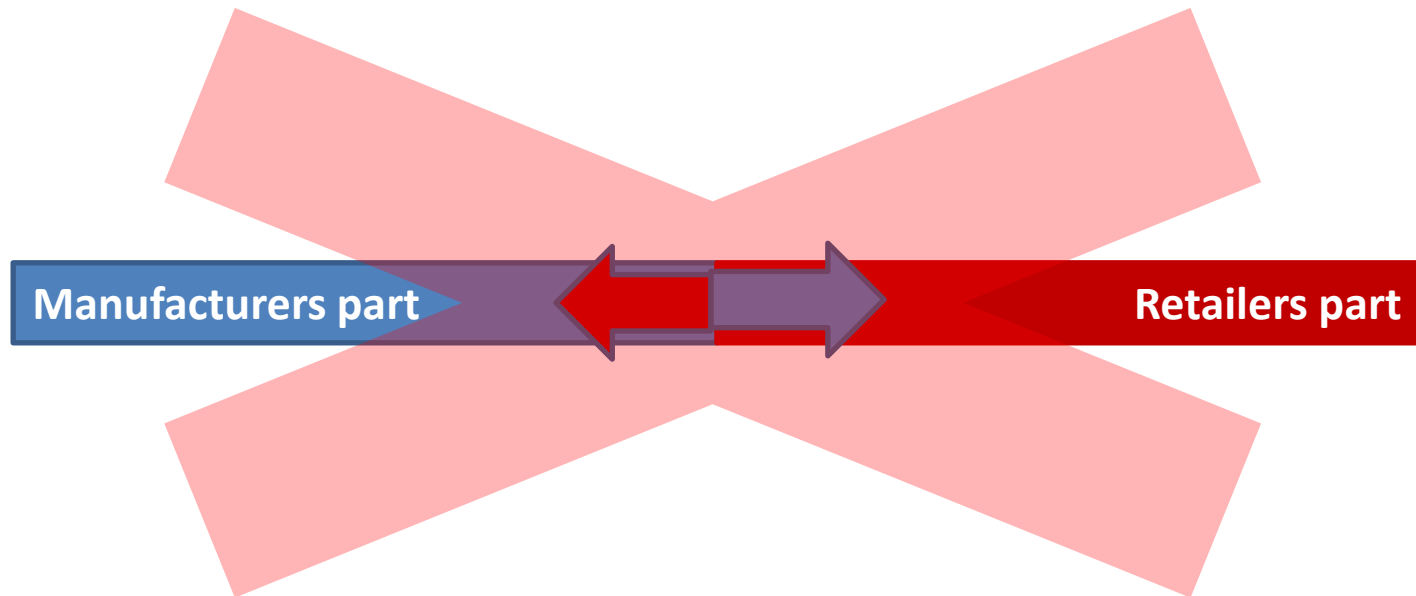


How does ECR work on demand side? Growing Demand!

Working collaboratively to focus on consumer/shopper needs



ECR is about efficiency and cost reduction of whole supply/value chain and not moving costs and profit part back and forth!



For overall cost calculation ECR use ABC – Activity Based Costing

ECR activities



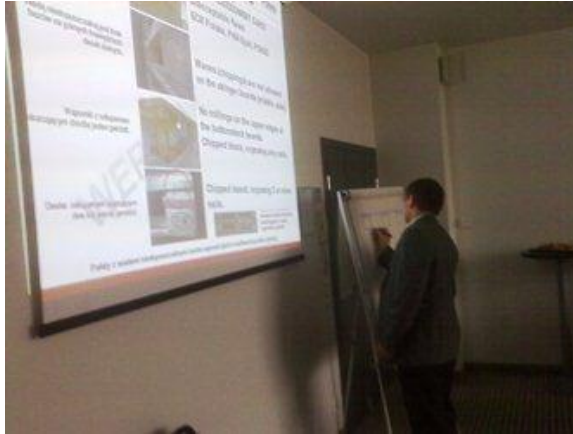
Cutting costs

- EDI (Electronic Data Interchange)
- Master Data Synchronization
- Reducing Losses (Shrinkage)
- Global Identification standards for Products and Companies
- Shelf Ready Packaging
- Logistic Initiatives (Pooling, etc)
- Collaborative planning forecasting and replenishment
- Traceability in supply chain
- RFID

Generating Demand

- ◆ Category Management
- ◆ Efficient promotions
- ◆ Efficient new products introductions
 - ◆ Consumer Insight
- ◆ Out-of-Stocks reductions
 - ◆ Efficient Assortment
- ◆ Consumer Relationship Management

Join ECR Baltic working groups



- Supply Chain Committee
- Pallets assessment working groups
- RTI (reusable transport items) unification
- Electronic Data Interchange
- Master Data Management and Data Synchronozation
- Education and Training Committee
- Demand – Category Management

www.ecr-baltic.org

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STRATEGY & STANDARDS

Consumer Goods
Forum



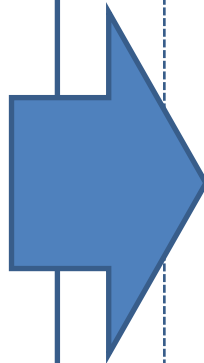
ECR Europe



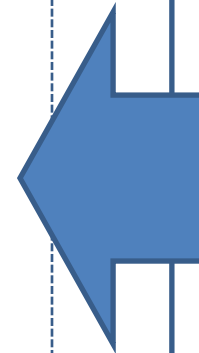
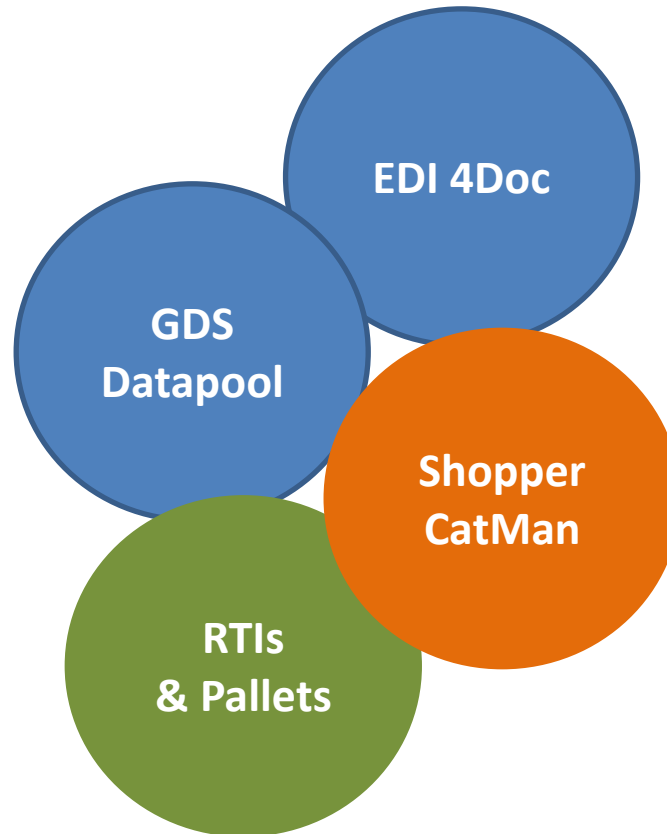
ECR Baltic



Global Standards
(GS1) and local
legislation +
local Industry
associations



ECR Working Groups:
FMCG Retailers and
manufacturers:



SOLUTIONS & IMPLEMENTATION

Telema, Edisoft
Itella,

1Worldsync,
GS1, Saphety

Nielsen,
Analyse2
Solutions

EPAL
Chep
Bepco
MPS
CC
BPP
K.Hartwall

Pallets assessment working group: ECR Baltic EUR Pallets assessment cards (PACs)



Version 1. from March 2012.

Companies are free to use PACs (also v1) to recognize what is proper EUR pallet and assess its Minimum quality requirements for exchange (exchange criteria).

The ECR Baltic EUR pallets assessment working group was extended by local manufacturers Industry associations and now working on **updated Version 2.** easing down to original UIC standard and improving color coding.

Until approval of Version 2 the actual version remain ECR Baltic Version 1.

EUR pallet myths busted (FAQ)

- **Application of PACs.** It is each and every company own responsibility and decision to apply ECR Baltic PACs or any other “manual” for maintaining qualitatively good pallet pool also by including PACs as an annex to supply agreements and/or just reference to UIC 435 standard or EUR Pallets.
- **Price of EUR pallets will double, why?**
Imports on EUR pallets exceed exports for more than 10 years in a row.
- **Costs of pallets management (not just price of the pallet you pay)?** There is an ECR Poland developed [excel tool](#) available or you can apply to competing pallet system operators for the cost audit.
- **EUR pallets write off levels [%] should be fixed.** This is the competence of each company to set/negotiate the write off levels of EUR Pallets between retailers and suppliers. Even if ECR Baltic working group to set the recommended or maximum level, it is not binding and may vary from the supply chain model. In general we have used assumption that the new EUR pallet can make 6-8 full cycles before repair and then 3 cycles when repaired (source ECR Poland).

EUR pallet myths busted (FAQ)

- **Only manufacturers buy pallets.**

Majority of presented retailers have heavily invested in their own pallet pool whitening!

- **Suppliers (manufacturers) prefer to repair EUR pallets on their own.** Was not true since none of participating manufacturers had intention to do so and disapproved this statement!

- **EPAL is a company and pallets with oval EPAL logo was lobbied by ECR Baltic EUR pallets assessment working group and PACs**

EPAL is a certified EUR pallets manufacturers association, just like ECR, LPUF or LPTA. Indeed EUR pallets manufactured and repaired in Lithuania, Latvia and Estonia goes with oval EPAL logo and/or repair shop nail equally other EUR pallets accepted for circulation (repaired or not). The green card of PACs describes the most frequent types of EUR pallets markings with an online reference to all possible EUR pallets certification agencies (i.e. National Railways) markings!

ECR Baltic v.2 development insights

PALLET ASSESSMENT CARD:

features of a proper EUR Pallet

BALTIC VERSION v2.0 SEPTEMBER

EUR Pallet



EUR Pallet is a branded good and therefore proper EUR pallets standards are defined by UIC 435

EUR pallets specific features:

- precisely defined dimensions of the pallets and their elements
- oval EUR logo on the right block
- railway or oval EPAL logo on the left block
- alpha-numeric markings on the middle block with following pattern LLL-Y-MM (License Number, Year and Month of manufacturing)
- ISPM 15 phytosanitary treatment sign (compulsory for all pallets as of 2010.01.01)
- control staple (compulsory for new pallets, as in the table)
- even cuttings of all four corners, at the whole height of the pallet
- the humidity of new EUR pallet shall not exceed 22%.
- All EUR EPAL pallets manufactured as of 2010.01.01 shall undergo heat treatment. They shall be chamber-dried.

Examples of middle block markings:



EUR EPAL Pallet



EUR Pallet CD (Czech)



EUR Pallet MAV (Hungary)

EUR pallet license agency logo on the left or central block as per tables of railway and EPAL license markings

control staple (compulsory for new pallets with exceptions, as shown in the table of railway license markings)

Dimensions of a EUR1 Pallet

No.	Element	Number of elements	Dimensions at 22% humidity (tolerance +/- mm)		
			Length	Width	Height
1	Utmost top board	2	1200 (+3/-0)	145 (+5/-3)	22 (+2/-0)
2	Middle top board	1	1200 (+3/-0)	145 (+5/-3)	22 (+2/-0)
3	Medium top board	2	1200 (+3/-0)	100 (+2/-2)	22 (+2/-0)
4	Stringer board	3	800 (+3/-0)	145 (+5/-3)	22 (+3/-0)
5	Utmost bottom board	2	1200 (+3/-0)	100 (+3/-3)	22 (+2/-0)
6	Middle bottom board	1	1200 (+3/-0)	145 (+5/-3)	22 (+2/-0)
7	Outer block	6	145 (+5/-3)	100 (+3/-3)	78 (+2/-0)
8	Middle block	3	145 (+5/-3)	145 (+5/-3)	78 (+1/-1)

All dimensions in millimeters, according to UIC 435 Code
The blocks in EUR pallets can be made of either solid or crumbed wood



LATVIJAS PĀRVAIĻU
TĪKUMA MĀRŠKĻIŠKA



LATVIAN RAILWAYS
GENĒRĀLĀ PĀRĒRĒKŠĀ



National Committee
in Baltic States

Country	EUR Pallets markings (EPAL licensed)		Date of the beginning of the licence	Control staple on new pallet's middle block
	EPAL markings left block	middle block		
Poland	(11)	DB PL 000-0-00	from 05/2004	Yes!
Latvia	(11)	DB LV 000-0-00		Yes!
Germany	(11)	DB D 000-0-00	from 01/2005	Yes!
Belgium	(11)	B 000-0-00	from 09/2000	Yes!
France	(11)	SNCF F 000-0-00	from 02/1999	Yes!
Spain	(11)	CFE ES 000-0-00	from 10/1999	Yes!
Ireland	(11)	BRB IE 000-0-00		Yes!
Portugal	(11)	CP PT 000-0-00		Yes!
Slovenia	(11)	SZ SI 000-0-00	from 10/2005	Yes!
Switzerland	(11)	SBB CH 000-0-00		Yes!
		BRB IE 000-0-00		Yes!
		FS I 000-0-00		Yes!

Notes: Austria - A, Bulgaria - B, Belarus - L, Estonia - EE, Greece - GR, Holland - NL, Hungary - H, Lithuania - LT, Latvia - LV, Romania - RO, Turkey - TR, Ukraine - UA

Country	EUR Pallets markings (Railways licensed)		Date of the beginning of the licence	Control staple on new pallet's middle block
	Railway markings left or middle block	middle block		
Austria	ÖBB	ÖBB	from 01/2005	Yes!
Croatia		HŽ		
Czech		ČD	from 01/1994	
Denmark		DSB		
Finland	VR	green cargo	from 01/2009	
Norway	NSB	green cargo	from 05/2006	
Slovakia		ZSRK CARGO	from 01/2007	
Sweden		green cargo	from 01/2001	
Hungary		MAV		Yes!

There are EUR pallets with other markings as well. The valid list can be found on www.epal-pallets.org

ECR Baltic v.2 development insights

PALLET ASSESSMENT CARD:

unacceptable flaws

BALTIC VERSION v2.0 SEPTEMBER 2012



Latvian National
Consumer Rights Protection
Center



Lithuanian National
Consumer Rights Protection
Center



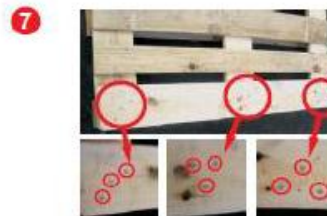
National Committee
in Baltic States



Wanes (chippings) are not allowed on the stringer boards (middle, side).



Chipped board, exposing 2 or more nails.



Unlicensed nails or irregular pattern of nailing.



No millings on the upper edges of the bottom deck boards.



No rotten wood or fungus is allowed at all. Such pallets shall be recycled.



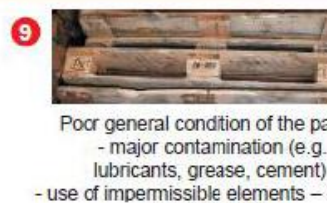
Goes to yellow card: It is permitted to use pallets having their outer boards chipped, provided that the depth of the chipping does not exceed 2 cm and no more than 1 nail is visible.



Incorrect marking on the blocks.



Chipped block, exposing any nails.

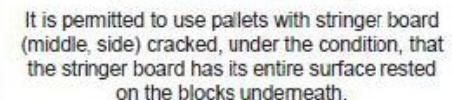


Poor general condition of the pallet:
- major contamination (e.g. lubricants, grease, cement)
- use of impermissible elements – boards, bearers, nails
- improper positioning of the elements, e.g. bearer moved versus boards

! Pallets with unacceptable flaws shall be repaired (if possible) or recycle

To be extended by color coding: solution to be proposed by manufacturers party?

BALTIC VERSION v2.0 SEPTEMBER



It is permitted to use pallets with boards cracked, provided that the crack's edges do not come apart (the crack can be board-long).

Repaired pallets can be used, the repair is certified by a repairing nail. The wooden elements used for the process shall be new and undergo the fitosanitary treatment.

ECR Baltic v.2 development insights

PALLET ASSESSMENT CARD: allowed flaws

BALTIC VERSION v2.0 SEPTEMBER

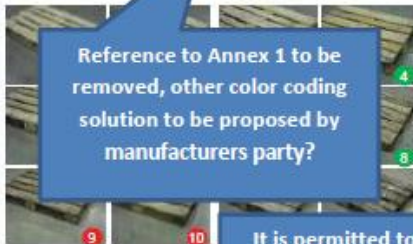


1



Pallet's grey color, a result of the natural wood ageing process, does not affect pallet quality.

Please refer to Annex 1 for complete set of allowed color samples:



Reference to Annex 1 to be removed, other color coding solution to be proposed by manufacturers party?

2



It is permitted to use pallets with boards cracked, provided that the crack's edges do not come apart (~~crack of upper board cannot be~~
~~crack of lower board cannot be~~
~~stringer board under it.~~

It is permitted to use pallets with boards cracked, provided that the crack's edges do not come apart (the crack can be board-long).

3



It is permitted to use pallets with a minor bark marking on one edge of the board, as shown on the picture.

4



It is allowed to use pallets with unrecognizable or damaged markings on the block, provided that the parallel block on the other side has all the proper markings.

6



The replaced middle block has no markings but the repairing nail. The replaced right block has "EUR with dot" logo, the replaced left block has "EPAL with dot" logo (also for non-EPAL pallets e.g. CD, MAV, ÖBB).

7



It is permitted to use pallets with blocks' cracks, provided that no nails are visible.

8



It is permitted to use pallets with stringer board (middle, side) cracked, under the condition, that the stringer board has its entire surface rested on the blocks underneath.

Repaired pallets can be used, the repair is certified by a repairing nail. The wooden elements used for the process shall be new and undergo the fitosanitary treatment.



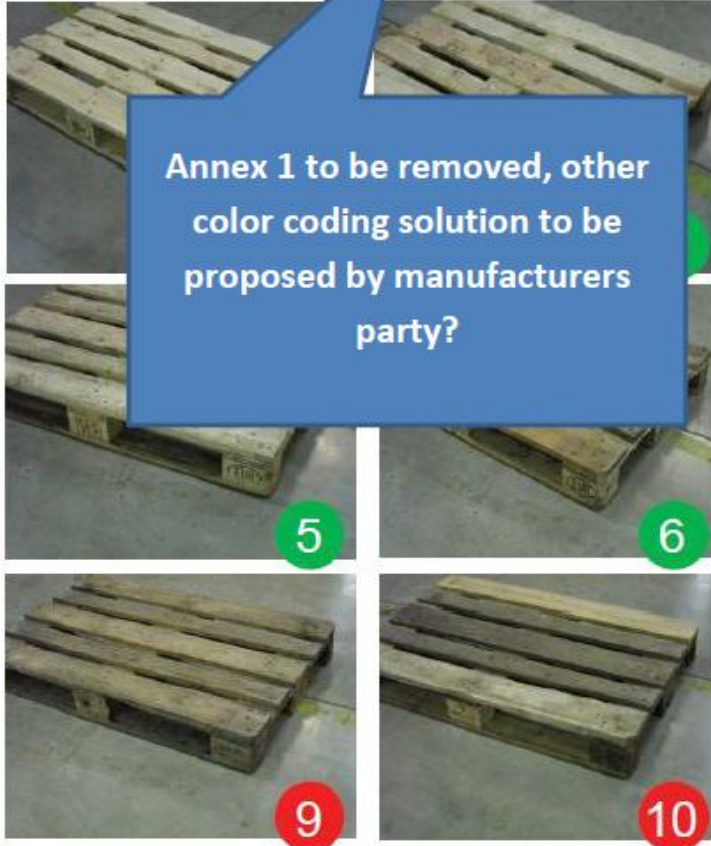
ECR Baltic v.2 development insights

PALLET ASSESSMENT CARD:
allowed flaws: ANNEX 1

BALTIC VERSION 1.0 / March 2012

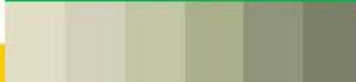


Annex 1 to be removed, other color coding solution to be proposed by manufacturers party?



Allowed

Not allowed



Supply Chain, top of mind issues at ECR Baltic?

- Definition of pallet terms, common understandings: max height, row (layer), tier, height, minimum orderable unit, etc,...
- Other than EUR Pallets (also plastic), pooling
- Pallets ID – harmonized European logistic label (with SSCC)
- Common Supply Chain KPIs for evaluating partners SC capabilities and performance for benchmarking.
(one can improve something only if it is measured!)

SC KPIs (Scorecard proposed by Unilever)

	Supplier 1	Supplier 2
Customer Service of Supplier is responsive and helpful		
Goods ordering system is effective and user friendly		
Ordered goods are delivered on time		
Delivery is done in accordance with order (Service Level)		
Invoices issued are correct		
Invoices are delivered on time		
Quality of goods delivered		
Efficient claim handling procedure		
Effective packaging and labelling system		
Efficiency in OOS handling		
Help in stock optimisation		
Evaluation	Score	
On very good level, often exceeding expectations	5	
On good level, sometimes exceeding expectations	4	
On acceptable level	3	
On poor level, below expectations	2	
On very poor level, significantly below expectations	1	



GLOBAL SCORECARD

- **Is a tool that uses a common language and measurement system to enable:**
 - Companies internally
 - Trading partners collaboratively
 - And, the industry collectively

- **To understand how well we are doing:**
 - Regarding the capabilities that have been built, we expect them to deliver benefits

Benchmarking overview for an individual company (numbers are for illustrative purposes only)

	Units	# Records	total revenue US\$m	Sample Weighted Avg	My Weighted Avg
Business Measures					
Annual Growth Rate	%	204	252980	5.4	7.9
Supplier Service Level / Unit Fill Rate to Customer Distribution Centre	%	190	263143	95.1	97.5
Store Service Level / Unit Fill Rate	%	80	129424	96.0	98.1
On-Time Delivery	%	232	274084	91.9	92.8
Manufacturer/Supplier's Finished Goods Inventory Cover	days	181	262620	20.5	34.9
Retail Distribution Centre Inventory Cover	days	97	153450	14.2	21.4
Retail Store Inventory Cover	days	83	153823	14.7	24.1
On-Shelf/Point-of-Sale Out-of-Stocks	%	100	199521	5.1	4.3
Lead Time	hours	243	276275	85.5	87.5
Distribution Costs (% of sales value)	%	210	220568	7.7	5.9
Invoice Accuracy	%	154	151337	94.0	94.5
Implementation Measures					
% of consumer units allocated Global Trade Item Number (GTIN)	%	1,713	629408	97.4	100.0
% of cases/cartons/innners allocated a Global Trade Item Number (GTIN)	%	1,794	629729	76.4	100.0
% of pallets/unit loads labeled with Serial Shipping Container Code (SSCC)	%	1,859	654475	42.2	73.0
% of shipping or receiving locations that have been allocated a Global Location Number (GLN)	%	1,830	642151	42.8	80.2
% of orders transacted via EDI	%	1,828	644860	96.0	79.6
% of invoices transacted via EDI	%	1,839	632739	45.7	44.9
% of shipments for which a despatch advice was transmitted via EDI	%	1,810	590390	20.7	31.7
% of shipments for which a receiving advice was transacted via EDI	%	1,823	584982	6.5	14.4
% of sales with synchronized master data between trading partners via the GS1 Global Data Synchronization Network (GDSN)	%	1,778	598681	15.8	25.3
% of sales with master data loaded into a GS1-certified data pool	%	1,632	600879	41.4	71.3
% of GTINs that are catalogued consistently with a GS1 Global Product Classification brick code (not using 9999 designation)	%	989	570433	41.6	85.0

My inventory levels are way out of line with the market averages

If I choose to drive EDI for orders, I know there are a lot of other practitioners

On the other hand- no one is driving EDI for invoicing, my investment costs will be high

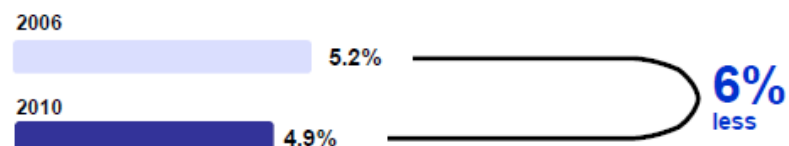
Welcome to
globalscorecard.net



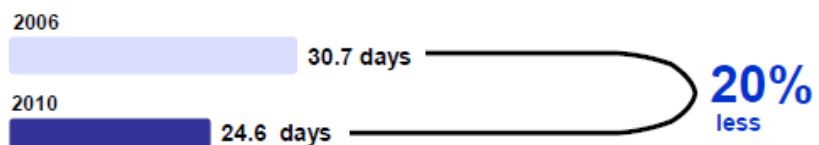
On-Time Delivery



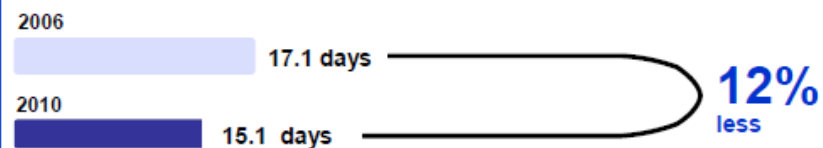
Distribution Costs



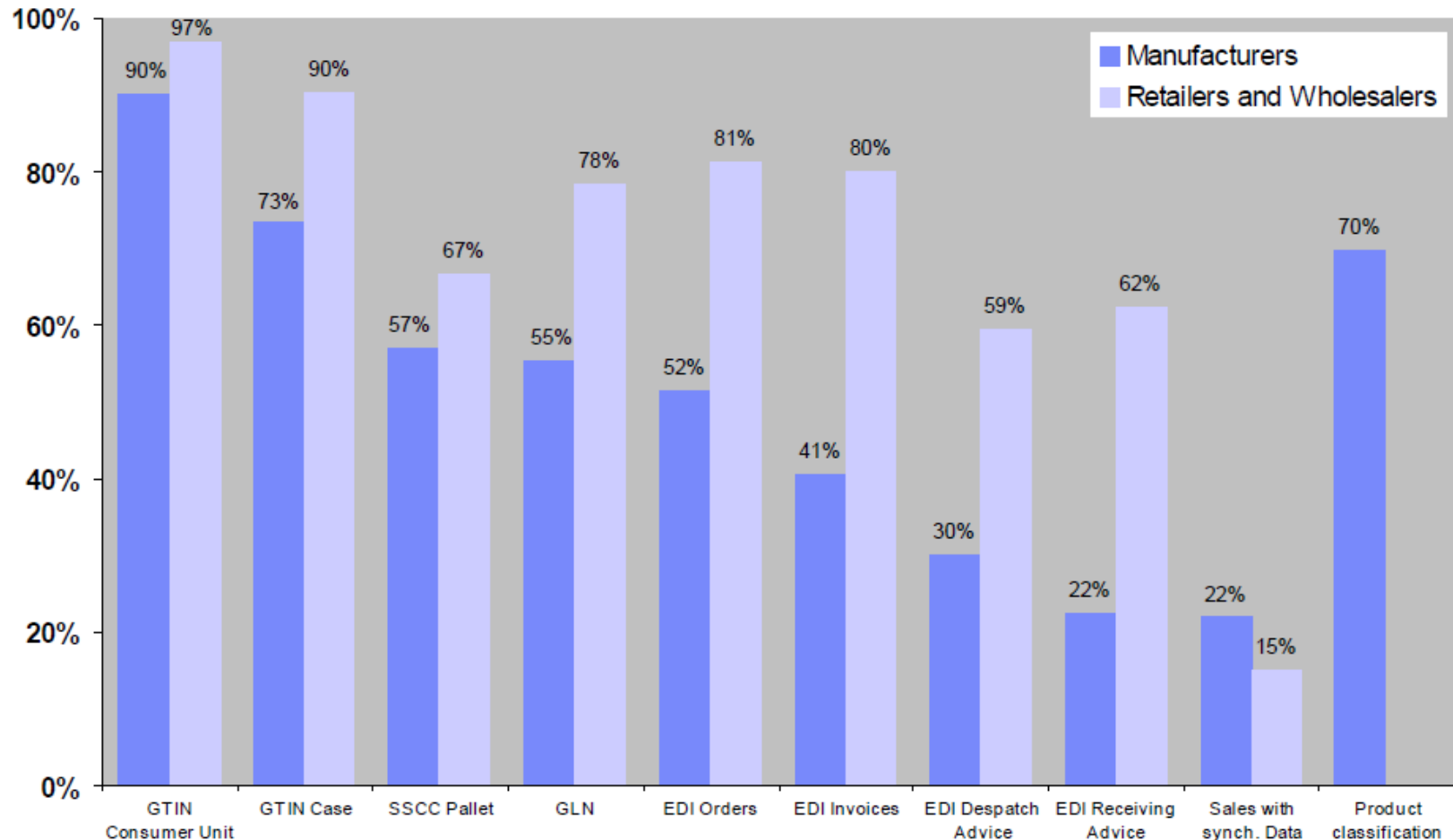
Raw Material Inventory Cover



Retail Distribution Center Inventory Cover



CP Retailers and Wholesalers tend to implement the standards on a higher average implementation level than manufacturers (worldwide). Interacting with more business partners makes an efficient supply chain exceedingly essential.



MAIN TOPIC OF TODAY!

14:30 Registration

14:40 - 15:10 Introduction (ECR Baltic supply side working stream updates: EUR Pallets assessment, RTIs, SC KPIs, Other) by Edgars Pentjuss, ECR Baltic

1. Crates unification vision:

1.1 Moving to the **standard crates in meat & dairy flows in all Baltic market**. Other flows possible.

1.2 Specification and range of crates developed and agreed between suppliers and retailers.

1.3 Generic crate specification (sizes), not owned by any solution provider, please refer to ECR Baltic recommendations

15:10 - 15:40

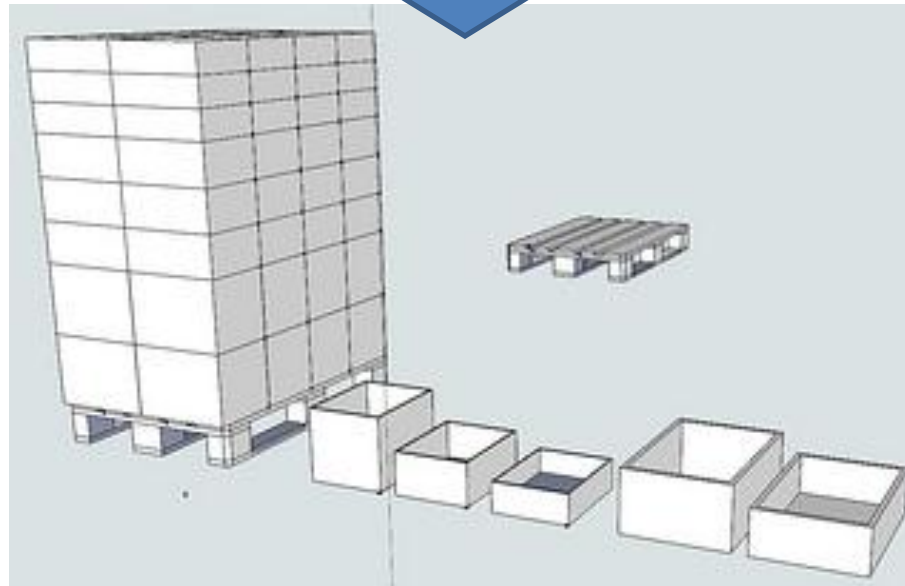
2. Presentation from retailers: what today's challenges we have with crates and what are the expectations for future

2.1 **RIMI** , 2.2 Others: **Palink, Maxima**

VISION



= ?

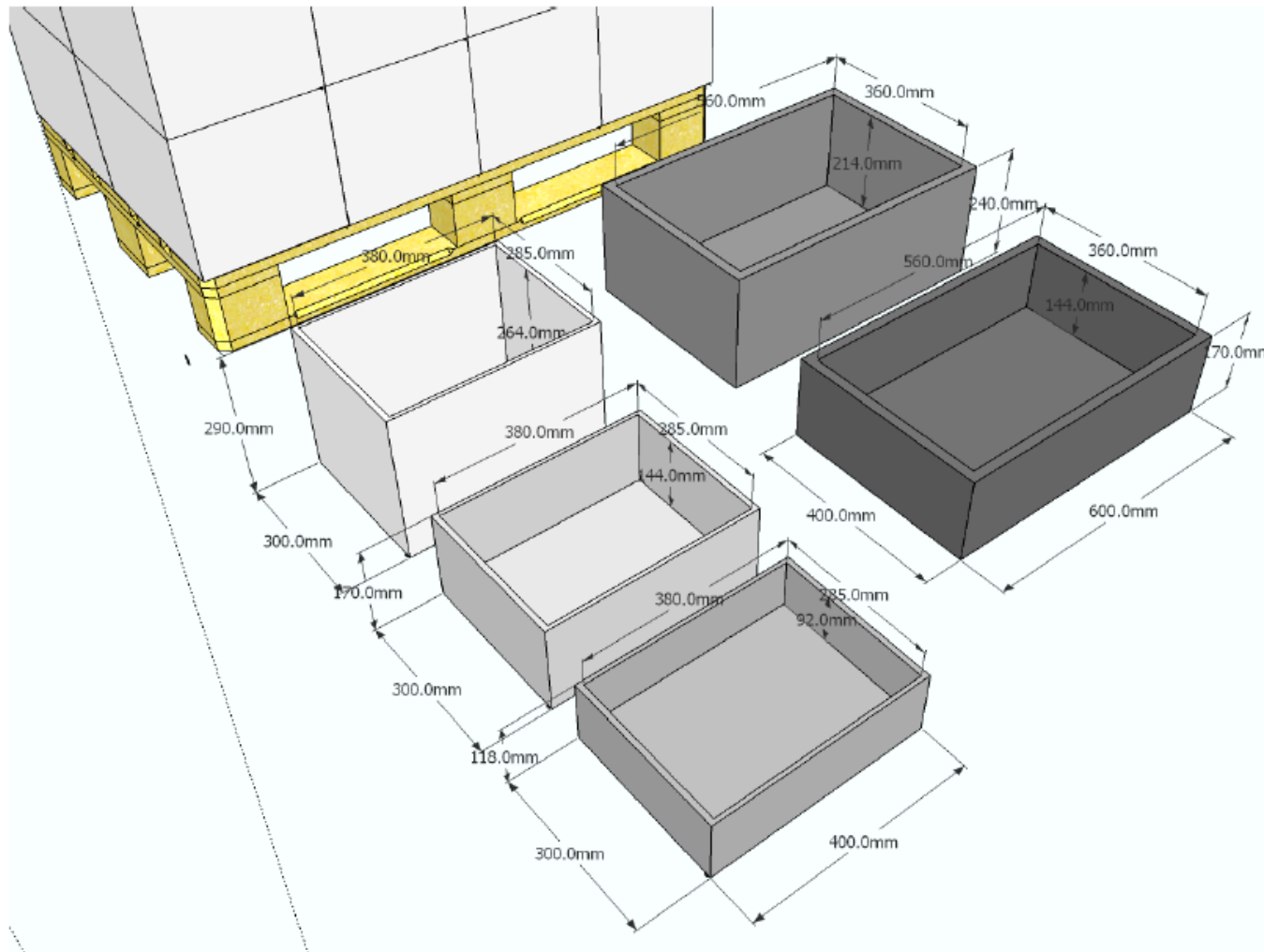


Returnable Transport Items (RTI) standardization!

Returnable Transport Items (RTI) standardization and pooling in dairy, meat, fresh fruits and vegetables categories can bring substantial savings, supply chain efficiency and improve over all competitiveness of the Baltic market and the positive environmental impact can be priceless!

According to very decent calculations provided by solution providers the savings from RTIs (in other words: plastic boxes/crates) standardization on retail and manufacturers' side can reach tens of millions euro annually. However the result depends on ability of collaboration between manufacturers and retailers, it appears to be extremely difficult exercise for the Industry for more than 5 years since the very first standardization initiative meetings. We instantly just can't get over "who shall pay for what?" discussions, not taking into account that all the time it was a consumer who over paid for his/her favorite food produce the same tremendous tens of millions euro every year.

RTI (Returnable-Reusable Transport Items) for dairy, meat, bakery, fresh fruits and vegetables*:



For RTIs, it is recommended to limit the number of crate types from more than 100 different types currently circulating in Baltics to 5-6. The crates must be compatible so that they can be piled up. The formats shall be limited to 60 x 40 cm and 30 x 40 cm as per recommendations below (height tolerance +/- 3 cm):

Dairy produce 3 crates set

External Dimensions (LxWxH mm)	Internal Dimensions (LxWxH mm)	Load Max	Primary packaging types:	Suitable for	Product categories
300 x 400 x 118 (H +/- 30)	285 x 380 x 92 (H +/- 30)	5 kg	75 mm diameter cups (18 pcs) 95 mm diameter cups: 12 pcs 200/250 ml pure packs 15 pcs	Poly packs and other small packaging	Yogurt, cream, sour cream, cheese, quark, deserts, etc.
300 x 400 x 170 (H +/- 30)	285 x 380 x 144 (H +/- 30)	10 kg	95 mm diameter cups: 12 pcs 450/500 ml pure packs: 15 pcs	Poly packs and other small packaging	Yogurt, cream, sour cream, cheese, quark, deserts, milk, kefir, etc.,
300 x 400 x 290 (H +/- 30)	285 x 380 x 264 (H +/- 30)	20 kg	1000 ml pure packs: 15 pcs 1500 ml pure packs: 9 pcs 1000 ml plastic bottle: 12 pcs 1000 ml poly packs (pouch): 18 pcs		Milk, kefir, yogurt, jellies, etc.

Meat, Bakery, Fruits & Vegetables crates set

External Dimensions (LxWxH mm)	Internal Dimensions (LxWxH mm)	Load Max	Primary packaging types:	Suitable for	Product categories
600 x 400 x 170 (H +/- 30)	560 x 360 x 144 (H +/- 30)	20 kg	Any packages that fit		Meat & bakery products
600 x 400 x 240 (H +/- 30)	560 x 360 x 214 (H +/- 30)	25 kg	Any packages that fit		Fruits & Vegetables

** approved by ECR Baltic working party on 11.04.2012, Riga*

Next meeting at annual ECR Baltic Forum 8 NOV 2012 VILNIUS:



10th November ECR Baltic Forum 2011 -
Improving together!

232 photos | 246 views

items are from 10 Nov 2011.





Vilnius Lithuania

6th ECR Baltic Forum

8 November 2012

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Thank you!

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