



The
Motorcycle
Industry In
Europe

European Affairs Newsletter

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COVID-19, MARKET AND END-OF-SERIES EURO 4

By Antonio Perlot, ACEM Secretary General

Dear Reader,

This Newsletter reaches you later than initially planned – largely due to COVID-19, which disrupted our lives over the last months. ACEM, as an office, on top of standard activities, had to put a high priority on adapting and reorganising its work. This was done both internally within the Secretariat, to ensure health and safety for the staff, as well as when it comes to efficient liaison with its members.

By now everybody is familiar with working from home arrangements and with virtual meetings and conferences, although it did take some time and efforts by all to adjust to the so-called “new normal”.

Looking beyond the association, the motorcycle sector in Europe was heavily affected by COVID-19. The lockdowns, which took place in early Spring at a time when markets are usually booming, brought a large part of Europe and mobility to a standstill.

This translated not only in the “Big 5” markets nearly all coming to a halt, with monthly registration figures in some cases beyond minus 90+% compared to the same period in 2019. It also meant that manufacturing activity sometimes stopped for a period of weeks, and when it restarted it took further time for the whole sector – from suppliers, to manufacturing and including distribution - to stop sputtering and run smoothly again.

But as citizens became mobile again, we started seeing a return to positive trends, in May and June. The Summer holiday months, July and August, when usually the market is slowing down, actually hit huge increases in many countries. Nearly all markets have been recovering, at different paces – as we have now entered the last quarter, some figures are even positive compared to last year (Germany, the Netherlands, Sweden).

September confirmed such positive trends in the majority of the markets, the negatives being far more contained than expectations at the peak of the sanitary crisis - nevertheless, in the last few weeks we have been facing a resurgence of COVID-19 across Europe, and a looming second wave raising

further uncertainties.

To address the critical issue of upcoming end of validity of Euro 4 approvals at the end of this year, after months of intense work with the European Commission, ACEM welcomes the recent decision by the Council of the EU and the European Parliament to endorse the European Commission's proposal adapting the rules on end-of-series vehicles in EU Regulation 168/2013.

This amendment will give motorcycle dealers and companies across Europe,

which have been affected by the outbreak of the COVID-19 pandemic, the possibility to sell their stock of Euro 4 vehicles until 31 December 2021, effectively providing a much-needed "safety net" to safeguard the business and jobs. Sector national associations will continue working constructively with public authorities to ensure suitable application of these extra-ordinary end-of-series allowances.

Enjoy the read and best wishes – may you and the sector stay healthy!



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SCIP DATABASE

by Ludovic Basset, ACEM Director Corporate and Public Affairs



For obvious reasons focus is usually placed on the understanding of the rules and requirements for the design and manufacturing of vehicles contained in the Type Approval legislation. However, this iceberg view often overshadows the vast array of other technical requirements which manufacturers must follow to be able to place their products on the EU market.

One of these relate to the handling of chemical substances and are contained in the famous REACH regulation: Regulation for Registration, Evaluation and Authorisation of Chemicals.

Another set of perhaps less known requirements is included in the Waste Framework Directive. This European Directive covers the basic concepts and definitions related to waste management,

such as definitions of waste, recycling, recovery. It explains when waste ceases to be waste and becomes a secondary raw material (so called end-of-waste criteria), and how to distinguish between waste and by-products. The Directive lays down some basic waste management principles and introduces the "polluter pays principle" and the "extended producer responsibility".

As part of the revision of this text in 2018, a new provision was introduced linking for the first time the treatment of products (towards recycling, recovery and waste) and the REACH Regulation: the creation of a global database for safe product disassembly and consumer awareness.

Chemicals and safe handling of products

In more detail, from 5 January 2021 companies supplying articles containing Substances of Very High Concern (SVHCs) on the REACH Candidate List in a concentration of 0.1% by weight (w/w) or above need to notify their information via a dedicated database hosted by ECHA: the SCIP database (SCIP stands for Substances of Concern in articles, as such or in complex objects/Products).

As explained by ECHA, the SCIP database should ensure that information on products containing SVHCs is available throughout the product's whole lifecycle, including the waste stage. The SCIP database is intended to make the sorting of waste easier and improve the quality of recycled materials.

Since February 2018, on several occasions, ACEM has expressed serious concerns regarding the workability, proportionality and added value of this database. Moreover, as we write this article (01/07) the database is not yet online.

From current prototype, the following steps will need to be undertaken by companies:

Assessment of how the article or complex object (product) will be identified in the notification:

- Article name, other names (E.g. Brand; Model; Type)
- Primary Article Identifier, other Article Identifiers (E.g. European Article Number (EAN); Global Trade Item Number (GTIN); Universal Product Code (GPC); Catalogue number; ECHA Article ID; part number.)
- Article category: Identification of the article or complex object from a

harmonised list based on function/ use (the integrated Tariff of the European Union – TARIC - list, based on the Combined Nomenclature (CN) of Annex I to Council Regulation (EEC) No 2658/87).

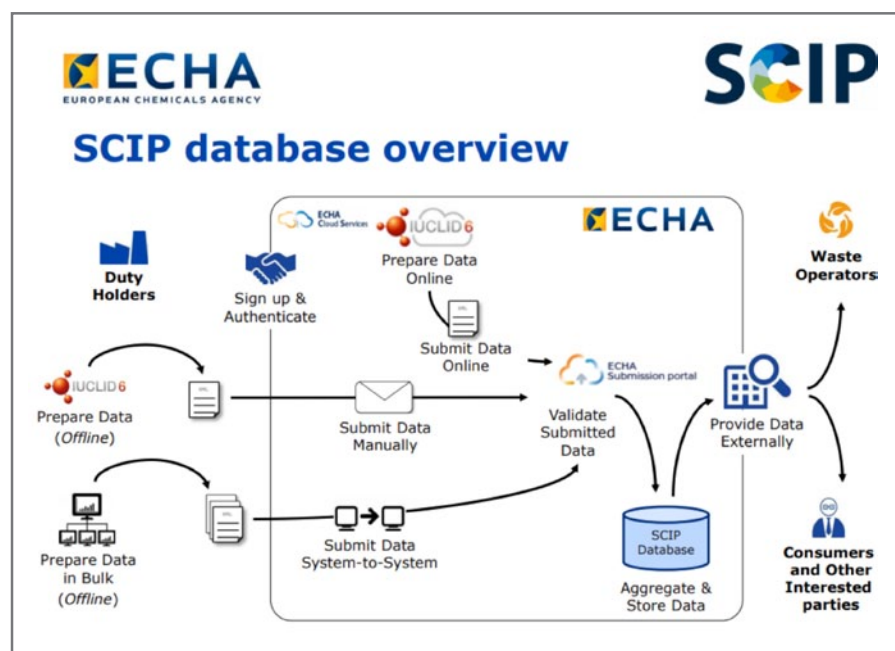
- Is the article produced or assembled in the EU?

Characteristics: Collect the article or complex object's characteristic(s) that may help to distinguish the reported article or complex object from similar articles or complex objects. E.g. Height; Length; Width; Diameter; Density; Weight; Volume; Colour.

Define the **safe use instructions** required for the articles as such and in complex objects. Disassembling instructions may also be included.

- identification of the Candidate List substance;
- identification of the Candidate List version;
- concentration range of the Candidate List substance in the article; and
- identification of the material category of the article or the mixture category where the Candidate List substance is present. The Candidate List substance is either present on the material the article is made of or in a mixture incorporated in the article under a further processing activity (e.g. coating).

Review the detailed list of all information requirements and the SCIP IUCLID format to find the correct path to adapt your data.



Complex object components:

A notification of a complex object will include the information of the components containing SVHCs (on the Candidate List) in a concentration above 0.1 % w/w and the specification of number of occurrences of the linked article in the complex object.

Collect the **information of the Candidate List substance(s)** in the article:

This, simply to show you the extreme complexity of the planned process.

For sake of clarity, a motorcycle would be defined as a complex object, composed of other complex objects such as parts and equipment, themselves composed of single articles. As an example, an "O ring" would qualify as an article. If the "O ring" weight concentrates 0.1% of a substance on the REACH candidate list, the O ring information must be inserted in the database together with all the objects in

which the O ring can be found.

To put this in perspective, the database would become one of the 3 largest databases in the world.

How to stop a nightmare?

Because of the lack of prior impact assessment, ACEM, together with many other business organisations, has called on the Commission to conduct an evaluation and impact assessment of the proposed database to verify whether the objectives of the Waste Framework Directive can be achieved. To date, the possible benefits that data from this database could bring to waste operators, consumers and authorities versus the implementation and administration required in the complete supply chain have not been demonstrated.

Regarding the workability and the proportionality of the database, it seems obvious that the deadline of 5 January 2021 is unrealistic and should be delayed. Not even mentioning the impact of COVID on the manufacturers' activities and of their suppliers alike.

For virtually all the sector organisations, the current SCIP database information requirements exceed REACH Article

33(1) legal obligations while only the information legally required by REACH Article 33(1) should be requested on a mandatory basis.

Even waste treatment operators are expressing serious doubts about the usefulness of the SCIP database.

It is unlikely that this project will contribute to a circular economy if waste treatment operators will not use it. As such ACEM has call for a thorough impact assessment to evaluate the effectiveness and added value of the database for waste treatment operators to ensure that the significant efforts and costs facing market operators will be worth it.

There are also many practical points related to operating the SCIP database, which should be looked at, such as the possibility to use alternative reporting formats to avoid duplication of data, the protection of Intellectual Property Rights regarding confidential business information, ensuring fair competition and a level playing field between EU-produced and imported articles and many others.

Weeks ahead will be of crucial importance as the European Commission should assess if more

time would be needed to re-assess the project, even though legally speaking the date of 5th January 2021, for the application of the database, is enshrined in legislation.

More information on the ECHA website: <https://echa.europa.eu/scip-database>



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MOTORCYCLE INDUSTRY'S SAFETY STRATEGY "THE SAFE RIDE TO THE FUTURE 2.0" RECEIVES STRONG SUPPORT FROM THE EUROPEAN COMMISSION

by Dr. Veneta Vassileva, ACEM Safety Manager



On 1 October 2020, ACEM launched the renewed motorcycle industry safety strategy, "The safe ride to the future 2.0". The strategy was presented at the High-Level Road Safety Group meeting, to the presence of member states representatives, giving the document an additional large-scale promotional boost.

The European Commission congratulated ACEM for the strategy and praised the industry's safety initiatives, such as the European Motorcycle Training Quality Label. The document has been endorsed by the **European Commissioner for Transport**, Adina Vălean, who signed the **strategy foreword**:

"We commend the commitment of ACEM, and I welcome the motorcycle industry's road safety strategy. The EU committed to reduce road fatalities and serious injuries by 50% by 2030. To reach this ambitious target, we are implementing the Safe System approach which addresses all important areas for road safety: infrastructure, vehicles, driving behaviour and post-crash care. The European Motorcycle Training Quality Label has been strongly supported by the European Commission. Indeed, high-quality safety

training is a fundamental element in the Safe System approach. We must continue working together towards better road safety for all on Europe's roads".

Concurrently, the European Coordinator for Road Safety, Matthew Baldwin, commented:

"This is great work from ACEM and we need stronger stakeholder involvement like this at all levels. This is an efficient way to deliver well-tailored safety initiatives that are relevant to the motorcycle community. We will continue to work closely with the industry and are very grateful for their determination to help us meet the safety targets agreed within the EU and of course now set globally at UN level for the next decade".

This is the first time that the motorcycle industry's safety strategy has received this level of institutional recognition. It is a great acknowledgment of the industry's commitment to manufacturing safe and advanced vehicles and to laying the groundwork for the future.

The strategy truly reflects the Safe System approach encompassing technology, human factor and

infrastructure reconfirming the industry commitment to safety.

"The safe ride to the future 2.0" sets the vision of the motorcycle sector on the horizon 2030, in areas such as advanced safety technology and connectivity. More than 30 new features (most of them safety related) have been introduced to the market by individual manufacturers since 2014, and many advanced rider assistance systems are in the pipeline.

Manufacturers are also working actively within the Connected Motorcycle Consortium to ensure motorcycles will be part of the future connected world.

The policy document also elaborates on the industry's initiative for increasing the quality of post-licence motorcycle training in Europe, through a [European Training Quality Label](#), the voluntary certification scheme for post-licence safety training programmes, run by ACEM, the German Road Safety Council (DVR) and the International Motorcycling Federation (FIM).

In just 3 years, the programme has certified 31 motorcycle training schemes, in Austria, Belgium, France, Germany,

the Netherlands, Sweden and Spain. In 2019 Label received the European Road Safety Road Safety Charter Award in the category “voluntary commitments”.

The document describes as well how the motorcycle sector has been working with other European and national stakeholders to promote the implementation of motorcycle specific safety initiatives. The goal is to encourage policy makers to adopt safe

system approach towards motorcycling. Combined with a stronger engagement from the public- and private sectors, and civil society, this would result in further improvements in motorcycle safety.

Finally, the document highlights how inclusive motorcycle mobility and safety policies will benefit users as well as the rest of society reinforcing the call upon national, regional and local policy makers.



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MOTORCYCLE SAFETY STRATEGY



The strategy is available at <https://roadsafetystrategy.acem.eu/>, an interactive website where you can read the different chapters and download the full document, the executive summary and the infographics.

CYBER SECURITY. A NEW ACEM TASK FORCE.

by Thomas Vercammen, ACEM Technical Manager



The digital transformation of vehicles

In the past years, there is a growing trend of cyber-attacks, this in parallel to the worldwide digital transformation of the vehicle industry that is bringing automated and connected vehicles. To address concerns about data protection and potential cyber-attacks, a new UN Regulation with Cyber Security (CS) requirements for cars was developed since 2016. The final proposal for such a car regulation got recently adopted in Geneva at WP.29 and UNECE publication is expected by the end of 2020 or beginning of 2021. In the EU, this UN Regulation will become mandatory as from July 2022 for new type approvals and 2 years later for all new vehicles (1st registration).

In 2018, in Geneva, some countries wanted to include motorcycles and L-category vehicles in the scope of the (car) regulation, but IMMA successfully requested policy makers to add L-category vehicles only in a second step, after experience is gained from automotive – with the exception of quadricycles (L6/L7 vehicles) with SAE automation level 3, as these are already included in the current, first step.

In Brussels, earlier this year, the European Commissions has informally announced to ACEM that they will consider a proposal to add cybersecurity

requirements for L-category vehicles in the EU Regulation for the future.

New ACEM Task Force Cyber Security

In order to build expertise and a position on this topic within ACEM, a new 'TF-CS' was set up beginning of this year under the Technical and Regulatory Committee (TRC). An expert from BMW was elected as chair.

The TF-CS is in the process to reviewing the UN Regulation on CS for cars, and considering which requirements are relevant for motorcycles.

The TF-CS will also look at another new UN Regulation for cars on the topic of Software Updates, which is linked to the UN Regulation on CS.

Towards new requirements for L-category vehicles

The ACEM TF-CS will share its findings with IMMA's Sub-Committee on Safety, to build together with other IMMA members a common industry position and plan for the second step of CS requirements towards authorities in Geneva.

The IMMA work should ultimately lead to a proposal for an L-category specific UN Regulation on cyber-security, or an amendment to the existing UN

Regulation for CS of cars, adding motorcycles and other L-category vehicles to the scope.

Back to the EU level, the most logical pathway will then be that a future revision of the EU type approval regulation will mandate the application of the new/amended UN Regulation. The implementation timing of such new EU-requirements remains unclear at this stage and is obviously something for ACEM to monitor closely.



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SAFETY REQUIREMENTS FOR EV POWERTRAIN: THE NEW UNECE R136

by Riccardo Basso, ACEM Technical Officer



In 2019, the original version of UNECE Regulation 136 ('00 series of amendments') has been translated and published in the Official Journal of the European Union. This Regulation sets a new series of functional safety provisions to be fulfilled for obtaining type approval of electric powertrain components. Following the UNECE 1958 agreement, every EU country must accept electric powertrain components and electric powered vehicles type approved following the UNECE R136 regulation since 20 January 2016.

Parallel to this, the EU Regulation 3/2014 annex IV sets the functional safety requirements for electric powertrains. At the current stage manufacturers are free to apply either Annex IV to EU-3/2014 or UN R136.

In view of worldwide harmonization of regulations and lifting significant type approval repetition burdens, the European commission is, step by step, replacing provisions in the EU regulation with references to UNECE regulations as listed in Annex I of the three delegated acts for L-category vehicles. With this harmonization process the actual Annex IV of (piece of legislation) 3/2014 should be replaced by the UNECE R136 in the course of 2021. When UN R136 will be listed in Annex I of EU-3/2014, application of this UN Regulation will be

mandatory for the purpose of obtaining a Whole Vehicle Type Approval in the EU.

The current Annex IV sets provisions only on electrical protection from live parts, while R136 introduces further provisions in form of tests to be passed to obtain type approval, such as: vibration, thermal shock, drop test, fire resistance, over-charge/-discharge protection and over temperature protection.

ACEM is currently working within the International motorcycle Manufacturers' Association (IMMA) on a first series of amendments to the UNECE R136. The aim is to harmonize it to the latest UNECE R100 amendment proposal on electrical functional safety for cars.

IMMA EVTF (electric vehicle task force) is aiming for a submission of a draft proposal at the UNECE WP.29 Working Party on Passive Safety (GRSP) session of November 2020. If the IMMA proposal would be adopted in November, it would then go to WP.29 for vote in March 2021, and in case of a positive vote, it would be published by the UNECE towards the end of 2021. This timing is quite ambitious, and it may well be that the GRSP-adoption of a 01 series of amendments will slip into 2021, meaning that the publication will then be shifted to 2022.

As from the entry into force date of the 01 series of amendments (end of 2021/2022 – TBC), as with the 00 series of amendments, it will be possible to apply the 01 series voluntary for the purpose of EU-WVTA. And when the 01 series will be listed in Annex I of EU-3/2014, application will become mandatory.



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ACEM ANNUAL CONFERENCE POSTPONED TO 2021

by Manuel Ordóñez de Barraicua, ACEM Communications Manager



Following the last meeting of the ACEM Board of Directors (23 June 2020) the ACEM conference, initially foreseen on 17 November 2020, will be postponed to 2021. The rationale behind the decision is to continue working to develop adequate messages about the future of the sector before reaching out to external stakeholders.

The Board of Directors also agreed that the findings of the ongoing economic study should be presented at a separate event, preferably an online one, to allow a larger attendance to join. The preparation of the event is being handled by the ACEM task force responsible for events (TF-CONF) in cooperation with the Strategic Management Group (SMG).

Economic study

ACEM has commissioned the UK-based consultancy firm Oxford Economics to perform a study on the economics of the motorcycle industry in Europe. The study will estimate the economic footprint of the motorcycle industry, through its own activities, the procurement of goods and

services from other firms in the EU, and the consumer spending funded by the wages paid to employees in the industry and its supply chains.

These economic benefits will be quantified in terms of contribution to employment, GDP and governmental revenue through taxation. The report will also discuss other important areas such as international trade, the environmental benefits of the use of two-wheelers as well as sports and tourism. A separate annex will address the impacts of the C-19 outbreak on business activity in 2020.

Up to now Oxford Economics has interviewed members of the senior management of BMW, KTM and the Piaggio Group, as well as experts from the sports industry. The preliminary results of the study were presented to the members in July 2020 (slides here). Revised and expanded versions of the study will be presented in October and November 2020, in view of the final presentation of the study in the course of 2021.



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POST-COVID “NEW NORMAL”: TOWARDS A NEW MOBILITY FUTURE

by Ludovic Basset, ACEM Director Corporate and Public Affairs



As part of the European Green Deal, the European Commission is expected to adopt a Strategy for Sustainable and Smart Mobility in 2020. The Strategy would aim at accelerating the shift to smart mobility with a view to achieving a 90% emissions reduction of road, rail, aviation and waterborne transport by 2050.

Moreover, the Strategy would endeavour to ensure to users more affordable, accessible, healthier and cleaner alternative to their current mobility habits.

The Strategy is not intended to commit on specific policy measures but it will announce policy objectives and areas for intervention. In particular, it will include an action plan with a list of measures that the Commission will take to achieve the objectives of the strategy.

The Strategy will set a clear policy framework to:

- Boost the uptake of lower and zero-emission vehicles, vessels and aircraft;

- Incentivise large scale market deployment of new technologies, including production capabilities and use of sustainable alternative fuels and associated charging and refuelling infrastructure;
- Facilitate a shift towards low emission transport modes by moving passengers and freight transport to more sustainable alternatives,
- Improve efficiency across the whole transport system, including through multimodality;
- Incentivise sustainable consumer choices and zero and low emission practices, for example through internalisation of external costs, such as carbon pricing;
- Revamp the European agenda for sustainable urban and regional mobility, including cycling, intermodal transport and transport-on demand;
- Take full advantage of the opportunities digitalisation and automation present to achieve

sustainable, efficient, seamless, smart and safe mobility across the transport modes;

- Identify actions to revitalise and strengthen the Single Market for transport and smooth connectivity for citizens and businesses in order to give a further boost to industrial competitiveness; actions to build a flexible, resilient transport system that can maintain the cross-border flow of persons and goods during future crises;
- Mobilise research and foster innovations and set the right regulatory and non-regulatory framework for a leading European transport industry, both in clean and connected mobility;
- Ensure a just transition and mobility that is fair, attractive, accessible and affordable.

A series of public consultations have been launched early July to gather the views of citizens and stakeholders on the elements of the Strategy and looks

into how the current framework set out in 2011 Transport White Paper has delivered up to now. ACEM will respond to the consultation in the coming weeks.

The Commission will also complement the open public consultation with targeted consultations to ensure a broad consultation with Member States' authorities, social partners, and other stakeholders, including trade associations, industry, consumer and relevant non-governmental organisations.

The results of the consultations are expected to feed into the drafting of the Communication. It will be accompanied by a Staff Working Document presenting the data and analysis underpinning the policy objectives and selected policies and initiatives for action.

In light of the open public consultation closing in late September, the presentation of the Strategy is likely to be delayed until the last quarter of 2020.



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ONE MINUTE NEWS



IMMA APPOINTS RAKESH SHARMA AS PRESIDENT

The International Motorcycle Manufacturers Association, IMMA, has elected Rakesh Sharma, Bajaj Auto Executive Director, as the new president for a 2-year mandate. In his new role, he succeeds Mr Johannes Loman, Director of PT Astra International Tbk and Executive Vice President Director PT Astra Honda Motor Indonesia.

Mr Rakesh Sharma joined Bajaj Auto in October 2007 as President and is

currently the Executive Director. He is a member of the Board of Commissioners of PT Bajaj Auto Indonesia, a subsidiary of Bajaj Auto Ltd and the Chairman of the Exports Council of the Society of Indian Automobile Manufacturers (SIAM).

IMMA represents the powered two- and three-wheelers manufacturing industry at global level. It promotes mobility through safe, sustainable motorcycling by advocating the development and

harmonisation of technical regulations affecting the motorcycle industry and by advancing inclusive policies for motorcycling.

EUROPEAN CO-LEGISLATORS ADOPT “EURO4 COVID MEASURE”

Following a proposal from the European Commission, the Council (Member States) and the European Parliament have now voted positively on a text that will provide a long awaited-for relief for manufacturers and dealers.

Upon publication of the measure in the Official Journal, a derogation on Euro 4 End of Series will be available in order to bridge the gap towards Euro 5.

This measure will avoid the need to unnecessarily scrap vehicles that would have been otherwise placed on the market in absence of the crisis.



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ABOUT THIS NEWSLETTER

This newsletter is issued on a quarterly basis and to give people working for motorcycle companies and national industry associations a concise overview of the most important European issues for the motorcycle sector. If you are a recipient of this newsletter, please do not share it with third parties.

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