



FEDEMAC Council 2003 - Letter from the President

I am writing this letter, having just returned from our council meeting in Copenhagen.

We had a very successful event. I was pleased to be re-elected president and feel that this has reinforced the confidence of my board and the membership of FEDEMAC.

My complete board was re-elected along with a new member Carl Bohn, from Adams Transport - Denmark. Torbjorn Ulf has retired after a dedicated and successful term.

Ellen Troska has included a resume of the conference in this edition of the newsletter. Our membership was well represented and included new representation from Italy, Latvia and France.

Our contact with the European Commission will be further reinforced by the signing of a memorandum signed by the 13 representatives of our member countries.

This supports the initiatives taken by the EU in line with the suggestions made during our lobbying sessions in Brussels. A combination of constructive criticism, helpful suggestions and appreciation of positive results will ensure that the voice of FEDEMAC is respected and continues to grow in the corridors of Brussels.

With the advent of the other accession countries next May, our Budapest Congress is taking place in a very appropriate place and at a very appropriate time. With 6 months EU membership we intend to have some interesting speakers to analyse the entry



Denis Caulfield

in the immediate short term.

As you will see the hotel is impressive and will be almost exclusively reserved for FEDEMAC. Comfortable, relaxed areas will facilitate business meetings and networking. The content of the congress will be varied and interesting. We will be developing the theme of the Young movers Vienna conference "Go East Young Mover".

We expect to have full Hungarian membership, either through a new association or direct affiliates present. A good representation from the other accession countries is expected. Do make sure that you book your place early. The number of participants is limited to 200 and the interest already expressed is impressive. Registration forms will be sent in May, but book the date in your diaries now!

I attended the Spanish mover's conference in Grand Canaria, in the beautiful town of Maspalomas. The surroundings were impressive. The business content was of great interest as the participation in the discussions showed. The structure of the FEDEM is somewhat different to other Associations but it works well. FEDEM's support for FEDEMAC has grown appreciably and the welcome which I received from Ramon de Santiago, the other presidents and the members was sincere and enthusiastic. Klaus Moericke's efforts and previous FEDEMAC presidency helped a lot.

Our next board meeting is in February in Budapest where we will finalise the Congress meetings and advance the Hungarian membership. We will then, as a new board define and plan our program and strategies for the short and long term future of FEDEMAC.

There are exciting times ahead. Our future is in the hands of bureaucrats in Brussels. They will listen to us and make decisions based on our presentations. It is important that we present our projects in the right place and within the time limit before these pass into community law. This will be even more important for the new accession countries. FEDEMAC membership is crucial to them over the next few years.

I take this opportunity to wish a successful and a happy new year to us all.

Denis Caulfield
FEDEMAC President



Budapest - Buda castle

Rijk VAN DAM, Member of the European Parliament



Why do you have a specific interest in transport issues?

Transport plays a vital role in all of our lives, from delivering the food that we eat to getting us to our places of work or study.

The EU's citizens rely on transport to provide them with goods, and to fulfill their own movement needs. This high level of movement has led to an inexorable rise in the number of journeys made in the EU by the various modes of transport: air, road, rail and water. Each transport system is designed for its specific locality, to meet the needs of the local people and businesses.

Also this is an important moment for the transport sector, it is experiencing a period of intense debate and important decision regarding, to name a few, safety, efficiency, environment, and quality. The European Parliament acts as a real legislator on this issue, sharing with the European Council the responsibility to give Europe a more efficient transport network, able to reduce congestion on European roads and make sure that people and goods can use accessible, fast and reliable transport and that local systems of transport can interact with each other. An efficient transport network covering the whole European territory is crucial for internal market development. Transport is the single most significant factor uniting markets and people across borders and can act as a motor of economic change.

What are the actual general trends in the European Parliament's transport policy?

Generally speaking and including all kinds of transportation; auto (private vehicles, motorcycles, buses, commercial vehicles), railway (merchandise and passengers), air (merchandise and passengers) and naval (merchandise transport on intern routes), the objective is to reduce the extern costs generated by accidents, pollution, artificially changing climate, noise and other unwanted secondary effects on the environment.

An example of this policy is the Marco Polo Programme with which the Commission is setting up a € 115 million five year programme (2003-2007) aiming at shifting the expected increase of road transport from congested roads to short sea shipping, rail and inland waterway services and to turn the notion of intermodality into a real alternative to road-only transport.

Commercial road transport must also seriously take into consideration the Kyoto Protocols as the road sector has a key role to play in helping Europe achieve its Kyoto Protocol obligations.

More specifically regarding road transport, security is also an important issue. About 40.000 people are killed in road accidents on European roads every year, the total costs for road accidents are estimated at over 160 billion a year in the European Union, and it is estimated that excessive blood alcohol concentration is involved in 1 out of 4 accidents and better drink-driving

management could prevent up to 10.000 fatalities in the EU annually. The not always very justified idea that the lorry is the big danger on the European road puts a great deal of pressure on politicians to show that they are doing something and taking measures to protect the voters.

All too often, events on transport safety are limited by sectoral focus and, therefore, exclude the possibility of intermodal debate and discussion. Though many of the safety issues presented are mode-specific, there were still many common areas of concerns and similar problems which need to be addressed through:

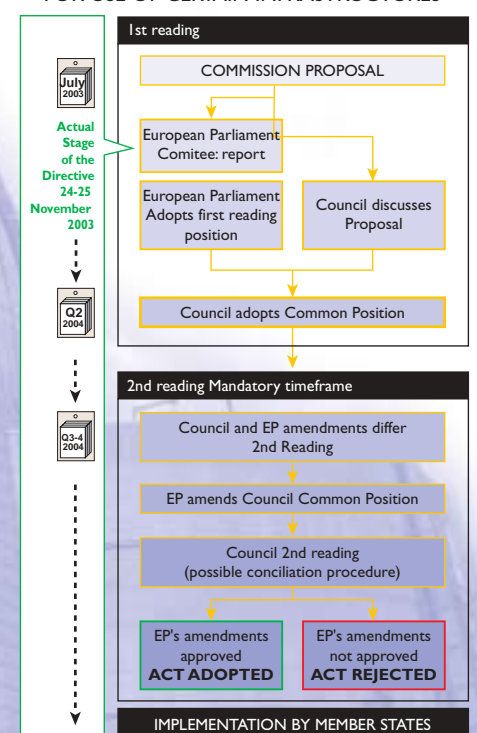
- further harmonisation and coordination across the EU 15 in standards, qualifications, practices, and procedures;
- more training and investment for the people working in transport;
- the need to take advantage of new technology;
- more open consultation and dialogue with all transport actors and stakeholders;
- greater implementation of European legislation that currently exists.

Rijk Van Dam is a Dutch member of the Group for a Europe of Democracies and Diversities in the European Parliament, Mr. Van Dam is Vice-Chairman of the EP Committee on Regional Policy, Transport and Tourism.

SIMPLIFIED GRAPH OF THE CO-DECISION PROCEDURE: DIRECTIVE "CHARGING HEAVY GOODS VEHICLES FOR USE OF CERTAIN INFRASTRUCTURES"

European Union is to try and unify and coordinate the efforts of the Member States which are currently examining reforms to include the cost to society in the prices paid by infrastructures users. Some countries are planning or have already undertaken to introduce new road charging systems linked to the distance traveled, and there is a high risk that these isolated initiatives will lead to a regulatory patchwork if no coordination effort is done at the EU level. This proposal therefore aims at aligning tolls systems and user charges for infrastructure use on common principles to ensure fair competition between operators.

Directive "CHARGING HEAVY GOODS VEHICLES FOR USE OF CERTAIN INFRASTRUCTURES"



A Little Bit of This and a Little Bit of That!

Contrary to our previous editions, you will not find in this issue the next episode of Tony Richman's fascinating history of FEDEMAC (the mystery, history, developments and successes).

We are currently in the process of making a full aggregate of the history of FEDEMAC which will be available for all members and interested outside parties. We have some

very interesting stories, pictures and life cycle information on FEDEMAC. But we want more in order to build an exhaustive and complete review of FEDEMAC's history !!

If you have information, old pictures or documents please send all your information to Dr. Ellen Troska (email: fedemac.troska@web.de) who is in charge of our FEDEMAC Headquarters in Hattersheim, Germany.

This exercise will enable us to collect them and compile everything in a wonderful document describing the history of FEDEMAC and make it easier for third parties to understand our organisation, aims and philosophy. This will be especially useful when approaching EU and national policymakers.

Thank you all for your kind cooperation.

By Lucien Pot

Views from Austria

With only 37 members, the Österreichischer Möbel Transport-Verband (ÖMTV) = Austrian Removers Association is a small but – as we believe – fine trade association. In any case the ÖMTV – which will be able to celebrate its 100 anniversary in 2009 – represents all reputable removers of Austria, whereby the majority of the members are family owned small and medium size enterprises.

Even the largest remover in Austria – with 75 employees – is, in comparison to other trades, a small company. And the few still existing removal departments in large freight forwarders such as Danzas, Express-Interfracht (part of Speditionsholding, which is 100 % owned by the Austrian railways ÖBB), Schenker and Gebrüder Weiss, are staffed with only a handful of specialists.

As in other trades, too, not every Austrian remover offers all services. Whilst some have specialized in high quality international moves, others concentrate more on local/regional or national ones, or are especially geared up to the move of offices and industrial plants. One needs a different type of vehicle for moving new furniture then for the move of "aunty Margret." Even expulsions are special cases. Not to speak of moving or storing professionally objects of art, some of which are unique and worth millions of Euro.

The range of "moves", therefore, spans a wide field. But all have in common that the human being, the human labour, is at the centre of the removal services, even so more and more technique is also applied in the daily work.

Removal services are first and foremost concerned with the household goods of people, their personal belongings/possessions. For this reason trust plays an important part, that is the customer should be able to trust that



Mr. Caulfield hands over the award for the best Report of General Secretaries 2003 to Klaus Jagersbacher

the remover will provide him/her with a professional service. In fact, according to the Austrian conditions of contract for removal services, the customer has a right to a "professional move."

How can the Austrian removers proof/show to the their customers that their trust is justified? Very simple, because ÖMTV members respectively provide "quality."

Since the ÖMTV is a small association, the financial support and, therefore, the personnel resources, are limited. It is, therefore, necessary to make the most of the means available, for the good of all the members.

The association, therefore, has been concentrating its work for the last few years on three main areas: Training (1), Quality (2) and – in the age of information – the appearance of the removers in the media, that is the Internet (3).

1) In Austria, there is no formal training for the staff of removers, especially the "blue collar" workers, the packers, that is those that do the actual physical work. For this reason the ÖMTV started in 1971, 33 years ago, to introduce and organize special training courses for the trade. These have been, especially in the last few years, enlarged and improved.

From training it is but a logical step to the next important area, namely quality. Because only trained, that is qualified personnel, can perform a qualified job and deliver quality.

2) Since 1997, the ÖMTV and its members have worked hard on putting into practice a "quality scheme." One reason for this quality drive was that from that year onwards there exists – besides the general international quality management standard ISO 9002 resp. now also 9001:2000 – with the European norm 12522/1+2 a specific standard for private removals.

The ÖMTV is very proud to have been the first association worldwide that made these standards a criteria for membership.

3) To be present electronically in the worldwide Internet is - in the 21st century, the age of the information society - of course a must. Whilst our first homepage was somewhat rudimentary, our new one (since November 2002) is, so we think, not only very informative but also very flexible (see www.oemtv.at).

By Klaus Jagersbacher, Managing director of ÖMTV, Austrian Board Member

Council Meeting Report

F EDEMAC Council 2003 decides about the future guidelines of the European Umbrella Association of the European Movers Associations

The Presidents, General Secretaries, and representatives of the National Removal Associations and Direct Affiliates met from November 28th to the 29th, 2003 in the Capital of Denmark, Copenhagen.

The election of the FEDEMAC President and the FEDEMAC Board was a feature of the meeting. Denis Caulfield from Ireland was re-elected as FEDEMAC President. Also the Board Members Klaus Moericke (Spain), Tony Richman (Great Britain), Ute Hannich (Germany), and Lucien Pot (Netherlands) were re-elected for another 3 years term. Carl Bohn is the newly elected FEDEMAC Board Member for Denmark.

Michael Svane, Vice-President of the International Road Transport Union (IRU) gave a speech on the first day of the meeting. He pointed out that the IRU represents the entire road transport industry world-wide which includes goods transport. In this context the IRU is known as international guarantor of the TIR carnet system. But the IRU is also active to make road transport safer and roads less congested. The organisation works for harmonisation and simplification of procedures, which affect road transport and strives to lift barriers to international transport and trade. In his speech Michael Svane thanked FEDEMAC, which is an associated member of IRU for the valuable contribution and proposals in fighting for common objectives.

Afterwards Tony Richman, Chief Lobbyist of the FEDEMAC Board and Henk Kramer, FEDEMAC lobbyist at IRU, gave detailed information about the Lobbying work and the contact with the EU administration. FEDEMAC's fight for a unique system for the regulation on the E.U. import of household

goods from third countries is on-going. During the last year the Netherlands, Sweden and Ireland have adopted or announced the adoption of the British system which allows final customs clearance of the imported household goods in the country of entering the E.U. and afterwards free circulation of the goods within the E.U.

During the Council Meeting the Presidents and representatives of the FEDEMAC Members signed a memorandum expressing the support of the association for the efforts of the E.U. Commission on the simplification and modernisation of VAT obligations. FEDEMAC would welcome the introduction of a user-friendly, flexible and robust VAT scheme. Individual business should be able to designate a single place of compliance in the Member State in which they have their main establishment. Information, documentation and payment dates should be standardised across all Member States, so that even companies that need to file VAT returns in multiple Member States are able to do so in a unique way across all their areas of activity. Furthermore FEDEMAC supports the harmonisation of the VAT rate across the E.U., ideally towards the lowest VAT rate to facilitate development of the single market.

The Council welcomed the idea to hold a FEDEMAC Congress in Budapest. The Congress will be held from 18th to 21st November 2004 in the capital of Hungary. It will be the right time to review the first experiences following the accession of the new Member States in May 2004 and to concentrate on the needs for further integration for the enlarged European Union. But the Congress will also offer a great opportunity for the FEDEMAC Member Companies to get in contact with each other or to intensify existing relationships.

Furthermore the agendas of the Council's, the President's and the Secretaries meetings were packed with presentations and the latest information about European Politics which impact on the European Removal Industry. During the Council Meeting the President, the Board, and the Secretariat of FEDEMAC were discharged and the subscription 2004 and the Budget 2004 were decided.

By Dr. Ellen Troska
FEDEMAC Headquarters



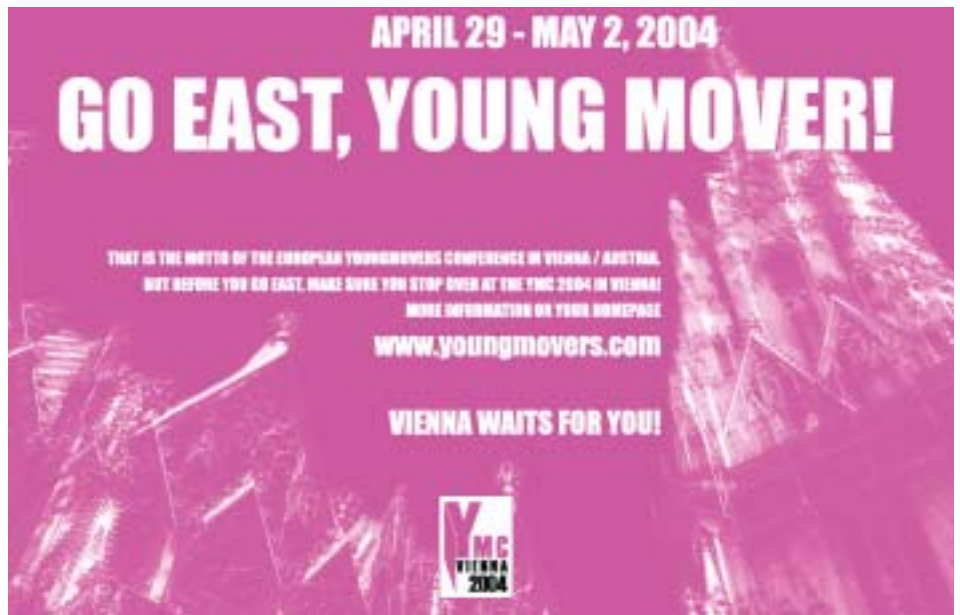
President and Past Presidents: Denis Caulfield, Klaus Moericke, Johan Wiersma, Tony Richman, Peter Scharrenbroich, Bernard Desponds

Young Movers Conference in Vienna

Vienna was and is the door to the South East of Europe. Austria is bordered by 4 of the 10 new candidates to the European Union. So the focus of this 11th Young Movers Conference was clear from the beginning. Go East Young Mover!

Europe is growing together – and we will face interesting changes, also in our industry. We can fear the changes or take the chances. Looking for the chances will be our target and this conference is the place where you will receive up to date information, where you can network, meet colleagues also from the East and listen to speakers who share their experience with you. If you are looking into the future, you should not miss the Young Movers Conference in Vienna.

So much for work. Vienna is also known for hosting enjoyable conferences. You will see



fantastic places and you will dance in historic buildings.

"So when will you realise – Vienna waits for you?"

(Find out who sings this "line and win an extra glass of wine at the Vienna "Heurigen"!

E-mail your answer to: info@youngmovers.com)

The Young Movers Committee

Basle, Rating and the Removal Industry - an economic relationship

The Basle II agreement, which will likely be ratified in mid-2004, provides an international framework between 143 countries for banks to systematically check the creditworthiness of their clients. Removal companies are those clients! This process of checking creditworthiness is called rating, and from 2008 on the banks will do this in accordance with their own internal rating system.

This procedure will influence the banks behaviour in terms of their willingness to give loans and credits. Even if a company has enjoyed a good relationship with its banker in the past, Basel-inspired rating process might change this. In some countries, the banks have already started to act differently in order to prove that their internal rating system will be able to support the Basle II system when it officially enters into force. The German market provides an example of this change. In this market, small and medium sized companies are generally accustomed to financing their business with less of their own capital than is the case in other countries. Because of this, German companies that are more heavily credit financed will be adversely affected. Under Basel II, there are six factors to be considered for the bank rating process:

1. Management of the company
2. Situation of the market and within the industry
3. Relationship between the client and the bank
4. Economic results of the company
5. Future development of the company (business and investment plan)
6. Rating of the industry

The rating of the industry to which a company belongs has a major impact on the company's rating. It is conducted on basis of the national and European statistical classification of industries.

After intensive lobbying, the German Removers Organisation, AMÖ, has achieved a reclassification of the removals industry, so that it is no longer mentioned as a component under "General Road Transport" – a category seen as a bad industry by the banks. Removal companies are now part of the statistical category of 'forwarders' because of their logistical expertise, and it carries with it financial benefits - forwarders and logistical enterprises have a better industry rating in the view of the banks. EUROSTAT, the European statistical body, is currently revising the European statistical industry classification. FEDEMAC, as the

association of the national removal associations, has made a statement on the revision and asked for the same classification as that received in Germany.

If EUROSTAT adopts the FEDEMAC proposal to classify removal companies as "forwarders" rather than "General Road Transport," all national removal associations will have a good background to care for an amendment of the national classification. Then they can set the Removal Industry free from the negative "box" of General Road Transport.

By Ute Hannich,
Treasurer



New Board member Carl Bohn and the Treasurer Ute Hannich in the European Commission

MEP Karla Peijs is appointed Transport Minister

Congratulations to Karla Peijs who has been appointed as Minister for Transport and Water management in the Dutch Government. In addition to wishing Karla all the best in her new and challenging role, FEDEMAC would like to thank Karla for her commitment and contribution to our issues during her five year mandate in the European Parliament.

Swedish Board member leaves

Torbjörn Ulf bade farewells during the last board meeting in Copenhagen. We would like to thank Torbjorn Ulf for his great commitment and contribution to our board meetings for the last 4 years and we wish him all the best for his future commitments.



Torbjorn Ulf receives a crystal bowl as a thanks gift from Denis Caulfield

Italian Removal Association A.I.T.I. joins FEDEMAC

We are delighted to welcome our new Italian Member A.I.T.I. "Associazione Imprese Traslocatori Italiani". A.I.T.I., located in Rome, was founded in 1953 and has now 97 member removal companies. Mr. Konrad Baumgartner, supported by President Mr. Robert Bolliger has taken on the responsibility of representing the Italian viewpoint at our next Council Board meetings.

A.I.T.I.

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French Removal Company Delahaye becomes Direct Affiliate

We extend a warm welcome to Delahaye, our new French member, who will once again represent the views of the French removal industry at the Council meetings. Delahaye Moving have also just launched their new website - please see it for yourself at www.delahayemoving.com

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