Position Paper on the European Commission's proposal for a Regulation on Alternative Fuels Infrastructures (AFIR)

October 2021



# **About UNIFE**

Operating in Brussels since 1992, UNIFE represents European train builders and rail suppliers. The association advocates on behalf of more than 100 of Europe's leading rail supply companies – from SMEs to major industrial champions – active in the design, manufacture, maintenance and refurbishment of rail transport systems, subsystems, and related equipment. UNIFE also brings together national rail industry associations from 11 European countries. Our members account for 84% of the European, and 46% of the global, market for rail equipment and services. We communicate members' interests at the European and international levels while actively promoting rail equipment and standards worldwide.

UNIFE strives to effectively represent its members' interests at both the European and international levels. Our mission is to proactively foster an environment within which members can continue to provide high-quality railway systems needed to meet the growing demand for rail transport – both passenger or freight services – in Europe and beyond. UNIFE is committed to maintaining the strong performance and technological leadership of Europe's rail supply industry. It continuously works to raise political and public awareness about the economic, environmental, and societal benefits of rail transport. This is why we are promoting rail market growth for sustainable mobility!

# **Executive Summary**

UNIFE – the association of the European rail manufacturing industry – has set the European Commission's proposal for a Regulation "on the deployment of alternative fuels infrastructure" (*hereinafter*: <u>AFIR</u>) as one of its main priorities in the framework of the Fit-for-55 Package.

European rail manufacturers are fully committed to foster the deployment of alternative fuels infrastructure in Europe, in order to minimise its dependence on oil, diversify and secure its energy supply as well as drastically mitigate the environmental impact of transport including for rail.

Clean technologies and alternative fuels represent one of the fastest growing markets in Europe, led by technological innovation. A repeal of the former AFI Directive and the proposal of an updated Regulation – in full compliance and consistency with the European Green Deal and its climate-neutrality ambition is, therefore, necessary.

The role of electrification and green propulsion systems – such as hydrogen fuels-cells and battery powered trains – assume tremendous significance. The proposed AFIR should set the regulatory framework which enables rail to harness the potential of clean technologies and alternative fuels.

By 2050, if the TEN-T rail network is completed and fully electrified, 70.000km<sup>1</sup> of lines in the EU will remain not electrified, without counting private railway networks (industrial networks, some shunting yards and harbors). In terms of rolling stock, it is estimated that around 6 000 diesel trains and as many diesel locomotives are in service today. This is why we believe that the proposed AFIR offers an opportunity to address the decarbonisation of the EU rail network.

With the present Position Paper, UNIFE aims to provide a thorough analysis of the Commission's AFIR proposal, expressing our members' views and stance, as well as suggestions for improving the text.

Rail is the greenest mode of mass transportation, having cut steadily its greenhouse gases (GHG) emissions and improved its energy efficiency. The ambition of reaching net-zero emissions, even ahead of the Green Deal's mid-century horizon, is within reach for the sector. The AFIR is an essential instrument to enable rail to lead the green transformation in the EU.

<sup>&</sup>lt;sup>1</sup> Calculation based on EU Statistical Pocketbook *EU Transport in figures* 2019.

<sup>-</sup> EU-27 rail network includes about 217.000km of main line, 54% being electrified today, i.e 117.000km.

<sup>- 95.000</sup>km of electrified lines are on the TEN-T (2015) and 22.000km on the non-TEN-T network.

<sup>-</sup> By 2050, 147.000km of lines in the EU (out of which 125 000 Km on the TEN-T and 22.000 Km on the non-TEN-T) will be electrified. 70.000km of lines will remain not electrified, compared with 100.000km today.

# Scope – The role of Rail

The former AFI Directive covered alternative fuels infrastructures only for road transport and shipping. Rail transport was therefore excluded from the AFID's scope.

UNIFE had repeatedly called the European Commission to include rail transport within the scope of the revision proposal.

#### **AFI Regulation proposal**

- Rail is contemplated in the scope of the AFIR proposal. All modes of transport are now addressed by the new proposed instrument.
- Electrification remains the main tool to drive rail transport towards net-zero emissions. The deployment of
  alternative fuels infrastructures for rail is bound to the specific condition that the infrastructure at stake
  cannot/will not be electrified.
- National Policy Frameworks (NPFs) by Member States would also include information about rail. They must specify domestic targets and measures to foster the roll-out of alternative fuels on specific segments of rail network which would not be electrified.

Recital (40)	Recital (11)	Art. 13 (1) (c) (p) – National Policy
In order to promote alternative fuels	Implementation in Member	<u>Frameworks</u>
and develop the relevant infrastructure,	States should ensure that a	By 1 January 2024, each Member State shall
the national policy frameworks should	sufficient number of publicly	prepare and send to the Commission a draft
consist of detailed strategies to	accessible recharging points is	national policy framework for the
promote alternative fuels in sectors that	installed, in particular at public	development of the market as regards
are difficult to decarbonise such as	transport stations, such as port	alternative fuels in the transport sector and
aviation, maritime transport, inland	passenger terminals, airports or	the deployment of the relevant
waterway transport as well as rail	railway stations []	infrastructure.
transport on network segments that		That national policy framework shall contain
cannot be electrified.		at least the following elements:
[]		[]
Long term decarbonisation strategies		(c) national targets and objectives for the
should also be developed for TEN-T		deployment of alternative fuels infrastructure
ports and TEN-T airports, in particular		related to points [] (p) of this paragraph for
with a focus on the deployment of		which no mandatory targets are set out in
infrastructure for low and zero emission		this Regulation;
vessels and aircraft as well as for		[]
railway lines that are not going to be		(p) a deployment plan including targets, key
electrified []		milestones and financing needed, for
		hydrogen or battery electric trains on
		network segments that will not be electrified.

#### **UNIFE's assessment**

- UNIFE <u>welcomes</u> the inclusion of rail within the framework of the new Regulation. Electrification remains
  the priority to fully decarbonise rail transport but there is the acknowledgment of the potential of other
  green propulsion systems for rail.
- UNIFE <u>welcomes</u> the explicit reference to hydrogen and battery electric trains within a domestic NPF's deployment plan.
- UNIFE <u>welcomes</u> the consistency between a deployment plan for the roll-out of alternative fuels infrastructures in rail with the eligibility of hydrogen refuelling infrastructures for rail under the Connecting Europe Facility 2 (CEF2) Work Programme<sup>2</sup>.
- UNIFE <u>requests</u> that mandatory targets for the deployment of alternative fuels infrastructures in rail are established, provided that they are adapted and updated according to the national decarbonisation strategies, in conjunction with the development of the technology. National mandatory targets related to

<sup>&</sup>lt;sup>2</sup> Annex to the Commission's Implementing Decision "on the financing of the Connecting Europe Facility"; Transport sector and the adoption of the work programme for 2021-2027; 6.2.2. Actions related to sustainable and multimodal mobility – Alternative fuels infrastructure.

those parts of the EU rail network which are not to be electrified would strengthen rail's decarbonisation strategy and ambition.

- UNIFE <u>requests</u> that rail is addressed in the "Technical Specification" of Annex II as it is the case for road and maritime transport. Infrastructure standards shall be developed in accordance with the existing and ongoing development of railways related standards.
- UNIFE <u>welcomes</u> the recognition of the role of railway stations as key infrastructures to enable multimodal electromobility. However, UNIFE <u>requests</u> that the same provision is foreseen for the installation, at railway stations, of hydrogen storage facilities coupled with standardised refuelling interface.

# **Definition of Alternative Fuels**

The former AFI Directive gave a definition of "alternative fuels" which, beyond electricity and hydrogen, was including: biofuels; synthetic and paraffinic fuels; natural gas in gaseous form (compressed natural gas CNG) and liquefied form (liquefied natural gas (LNG); and liquefied petroleum gas (LPG).

UNIFE had requested the European Commission to revise the typologies of alternative fuels included in the Directive, prioritising electricity, hydrogen and batteries. Therefore, the legal framework should focus only on those fuels which enable zero direct emission transport.

#### AFI Regulation proposal

- The definition of alternative fuels is enlarged and divided into three categories: 1) 'alternative fuels for zero-emission vehicles; 2) renewable fuels; and 3) alternative fossil fuels for a transitional phase.
- CNG, LNG and LPG are still included within the definition of "alternative fuels", falling within the 3<sup>rd</sup> category, and their role is emphasised notably for what concerns maritime transport and road transport for heavy-duty vehicles (HDV).
- Notably, mandatory targets are set for Member States to deploy LNG infrastructure along the TEN-T core network for road transport and in key maritime ports.

#### Art. 2(3) - Definitions

3) "alternative fuels" means fuels or power sources which serve, at least partly, as a substitute for fossil oil sources in the energy supply to transport and which have the potential to contribute to its decarbonisation and enhance the environmental performance of the transport sector, including:

- a) alternative fuels for zero-emission vehicles':
  - electricity,
  - hydrogen,
  - ammonia,
- b) renewable fuels:
  - biomass fuels and biofuels as defined in Article 2, points (27) and (33) of Directive (EU) 2018/2001,
  - synthetic and paraffinic fuels, including ammonia, produced from renewable energy,
- c) alternative fossil fuels for a transitional phase:
  - natural gas, in gaseous form (compressed natural gas (CNG)) and liquefied form (liquefied natural gas (LNG)),
  - liquefied petroleum gas (LPG),
  - synthetic and paraffinic fuels produced from non-renewable energy;

#### **UNIFE's assessment**

- UNIFE <u>questions</u> the permanence of fossil products such as CNG, LNG and LPG within the definition of "alternative fuels" due to their high GHG footprint from extraction, storage, distribution and burning<sup>3</sup> notably the targets for Member States on LNG infrastructure bear a high risk of stranded assets after 2050. The definition seems to go against the potential deployment of electrification, hydrogen, and ammonia in the transport sector. A clarification on the duration of the transitional phase would be necessary.
- UNIFE <u>calls</u> the European Commission, the European Parliament, and the Council to reconsider the definition on "alternative fuels" and make it more coherent with the ambition of zero-emission transport.

<sup>&</sup>lt;sup>3</sup> (--> <u>https://www.science.org/doi/10.1126/sciadv.aaz5120</u>

Fossil fuels in its various forms (i.e., LNG, LPG, and hydrogen produced through non-renewable sources) do not qualify for the decarbonisation of the transport sector and should therefore not be considered in the frame of the new Regulation.

## National Policy Frameworks (NPFs)

The former AFI Directive was mandating Member States to prepare National Policy Frameworks (NPFs) for the development of the market as regards alternative fuels in the transport sector and the deployment of the relevant infrastructure.

No mandatory targets at EU-level or at national level in the NPFs were established for the roll-out of alternative fuels infrastructures.

A reporting mechanism, from the Member States to the Commission, was set up regarding the NPFs implementation

UNIFE had stressed on the importance of stronger and more harmonised requirements for NPFs implementation by Member States. Provisions in the former AFID appeared not to be prescriptive enough to ensure a consistent implementation of the Directive and avoid diverging application by Member States.

UNIFE had also called for more coordination between NPFs to be fostered by strengthening the cooperation framework among Member States as well as the monitoring and reporting by the European Commission.

#### **AFI Regulation proposal**

- The proposed AFI Regulation still mandates Member States to establish National Policy Frameworks but, at Article 13, it enlarges considerably the number of elements to be included in the NPFs.
- The level of scrutiny on domestic strategies for alternative fuels is considerably strengthened. Member States have now to submit first a draft version of their NPF to the public and the Commission, with the latter having the power of assessment and formulation of recommendations.
- The cooperation tools among Member States remain centred around consultations or joint policy framework, with the addition of establishing a specific sector-based coordination for waterborne transport.

Art. 13 (4) (6) (7) (9) – National Policy Frameworks By 1 January 2024, each Member State shall prepare and send to the	Art. 14 (1) (5) – Reporting 1) Each Member State shall submit to the Commission a standalana programs report on the
the market as regards alternative fuels in the transport sector and the	implementation of its national policy framework
deployment of the relevant infrastructure.	for the first time by 1 January 2027 and every two
[] A) Where necessary Member States shall cooperate by means of	years thereafter;
<i>consultations or joint policy frameworks, to ensure that the measures</i>	5) The Commission shall adopt quidance and
required to achieve the objectives of this Regulation are coherent and	templates concerning the content, structure and
coordinated. In particular, Member States shall cooperate on the	format of the national policy frameworks and the
infrastructure in waterborne transport. The Commission shall assist the	submitted by the Member States in accordance
Member States in the cooperation process;	with Article 13(1) and six months after the date
[] 6) Fach Member State shall make available to the public its draft	referred to in Article 24. The Commission may adopt auidance and templates to facilitate the
national policy framework and shall ensure that the public is given early	effective application across the Union of any
and effective opportunities to participate in the preparation of the draft national policy framework;	other provisions of this Regulation.
7) The Commission shall assess the draft national policy frameworks	
and may issue recommendations to a Member State no later than six	
[]	
<i>9)</i> By 1 January 2025, each Member State shall notify to the Commission its final national policy framework.	

#### **UNIFE's assessment**

- UNIFE <u>welcomes</u> the higher level of prescription in domestic NPFs. This is expected to provide better alignment between the different national strategies – avoiding scattered implementation across Member States as it was the case for the former AFID.
- UNIFE <u>welcomes</u> that the opportunity, for the European Commission, to comment upfront on the draft NPFs providing an additional layer of security against strategic fragmentation. Moreover, the fact that draft NPFs would be released publicly may increase the level of transparency.
- UNIFE <u>welcomes</u> the mandate for the Commission to harmonise the content, structure and format of the national policy frameworks as well as of the national progress reports. This should increase the consistency, as much as the comparability, of Member States' deployment plans regarding alternative fuels infrastructures.
- UNIFE <u>calls</u> for the extension of such mandate, for the European Commission, to the effective application of any other provisions of this Regulation proposal.

### Trans-European Transport Networks (TEN-T)

The former Directive highlighted the synergy between the roll-out of alternative fuels infrastructures and the TEN-T. In particular, the Directive prescribed electricity recharging stations, as well as refuelling points for both LNG and CNG, to be coordinated with the implementation of the TEN-T Core Network.

Yet, due to the low(er)-scale of maturity of the hydrogen technology, no link between hydrogen refuelling stations and TEN-T was provided.

UNIFE had pointed out the need for a stronger alignment between the TEN-T Networks and the deployment of alternative fuels infrastructures in the EU.

Finally, UNIFE had stressed that, even if by 2050 the TEN-T network is completed and fully electrified, 70.000km of lines in the EU will remain not electrified. Therefore, there is a need to address the non-TEN-T part of the infrastructure to enable rail to reach net-zero emissions along the whole EU rail network.

#### **AFI Regulation proposal**

- The draft AFI Regulation establishes specific mandatory targets for Member States in order for domestic public authorities to roll-out alternative fuels infrastructures along the TEN-T Core and Comprehensive Networks.
- Along the TEN-T Core and Comprehensive Networks, Member States will have ensure minimum coverage
  of publicly accessible recharging points and hydrogen refuelling points dedicated to light- and heavy-duty
  road vehicles as well as appropriate number of LNG refuelling points in maritime TEN-T Core Network's
  ports and minimum provisions for electricity supply to all stationary aircraft.
- The AFI Regulation proposal does not set any requirements related to the installation of hydrogen refuelling points for rail along the TEN-T Networks, nor it address the non-TEN-T parts of the rail network.

<u>Art. 3(2) (a) (b) – Targets for</u>	<u>Art. 4 (1) (a) (b) – Targets for</u>	<u>Art. 6(1) – Targets for</u>	<u>Art. 11(1) – Targets for</u>
electric recharging	electric recharging	hydrogen refuelling	supply of LNG in maritime
infrastructure dedicated to	infrastructure dedicated to	infrastructure of road	<u>ports</u>
light-duty vehicles	heavy-duty vehicles	<u>vehicles</u>	1. Member States shall
Member States shall ensure a minimum coverage of publicly accessible recharging points dedicated to light-duty vehicles on the road network in their territory. Member States shall ensure that: a) along the TEN-T core network. publicly	Member States shall ensure a minimum coverage of publicly accessible recharging points dedicated to heavy-duty vehicles in their territory. Member States shall ensure that: (a) along the TEN-T core network, publicly accessible recharaina	1. Member States shall ensure that, in their territory, a minimum number of publicly accessible hydrogen refuelling stations are put in place by 31 December 2030. To that end Member States shall ensure that by 31 December 2030 publicly	ensure that an appropriate number of refuelling points for LNG are put in place at TEN-T core maritime ports [] to enable seagoing ships to circulate throughout the TEN-T core network by 1 January 2025. Member States shall cooperate with neighbouring Member

accessible recharging pools dedicated to light- duty vehicles and meeting the following requirements are deployed in each direction of travel with a maximum distance of	pools dedicated to heavy-duty vehicles and meeting the following requirements are deployed in each direction of travel with a maximum distance of 60 km in-between them	accessible hydrogen refuelling stations with a minimum capacity of 2 t/day and equipped with at least a 700 bars dispenser are deployed with a maximum distance of 150 km in- between them along the	States where necessary to ensure adequate coverage of the TEN-T core network.
[] b) along the TEN-T comprehensive network, publicly accessible recharging pools dedicated to light- duty vehicles and meeting the following requirements are deployed in each direction of travel with a maximum distance of 60 km in between them [}	(b) along the TEN-T comprehensive network, publicly accessible recharging pools dedicated to heavy-duty vehicles and meeting the following requirements are deployed in each direction of travel with a maximum distance of 100 km in between them []	comprehensive network. []	

#### **UNIFE's assessment**

- UNIFE <u>welcomes</u> the strengthened linkage between the TEN-T Networks and the roll-out of alternative fuels infrastructures, supported by the enactment of mandatory targets for Member States. These measures would support a more uniform and cross-border deployment of key infrastructures across Europe.
- UNIFE <u>calls</u> the Commission not to rule out the installation of hydrogen refuelling points for rail along the TEN-T (Core and Comprehensive) Networks, for which a derogation from the electrification requirement has been granted. This would be consistent with the provision, under the CEF2 Work Programme, of funding eligibility of hydrogen refuelling infrastructures for rail. The lack of any explicit reference to rail risks, on the contrary, to hamper the market uptake of clean technology in rail transport, where it has already shown a remarkable level of maturity.
- UNIFE <u>requests</u> that the non-TEN-T parts of the network are properly addressed by the proposal. It is
   estimated that about 70.000km of railway lines in the EU would remain not electrified once the TEN-T
   Networks have been completed. It is therefore urgent that strategies, at EU and national level, are
   considered to move away from diesel propulsion for railway services towards renewable energy sources.

### **TEN-T Urban Nodes**

The concept of TEN-T urban nodes remained rather missing in the former AFI Directive, which merely mentions "urban/suburban agglomerations and other densely populated areas".

UNIFE is a vocal supporter of the concept of "urban nodes" along the TEN-T Core Network. Urban nodes, at the crossroads between long-distance and metropolitan mobility, represent the strongest business case for the deployment of alternative fuels infrastructures. Urban nodes are also crucial to foster multimodality, with rail transport playing a central role for both passenger and freight.

#### **AFI Regulation proposal**

 Recharging points and hydrogen refuelling stations along the Core and Comprehensive Networks would need to be accompanied with a complementary roll-out along the urban nodes – as defined in the TEN-T Regulation.  Hydrogen refuelling stations should be also deployed within multimodal freight centres within the urban nodes, in order to potentially enable connections with rail and inland shipping.

Recital (15)	Recital (27)	Art. 13(1) (g) – National Policy
Recharging infrastructure along	[] To ensure that publicly accessible	Frameworks
the TEN-T network should be	destination refuelling is possible at least in	[]
complemented with fast publicly	the main urban areas, all urban nodes []	That national policy framework shall
accessible recharging	should provide such refuelling stations.	contain at least the following elements:
infrastructure in urban nodes [].	Within the urban nodes, public authorities	[]
	should consider to deploy the stations within	g) measures to promote alternative
	multimodal freight centres as those are not	fuels infrastructure in urban nodes, in
	only the typical destination for heavy-duty	particular with respect to publicly
	vehicles but could also serve hydrogen to	accessible recharging points;
	other transport modes such as rail and	[]
	inland shipping.	

#### **UNIFE's assessment**

- UNIFE <u>welcomes</u> the more significant role of TEN-T's urban nodes in the framework of the AFI Regulation proposal since they are essential to link long-distance and metropolitan mobility.
- UNIFE <u>welcomes</u> the reference to rail as a pivotal enabler of multimodality, in the context of urban nodes' freight centres.
- UNIFE <u>calls</u> for the strengthening of the requirements for public authorities in order to fully harness the
  potential of clean freight transport by rail.

## **Research & Innovation (R&I)**

The repealed Directive generally acknowledged that the Horizon 2020 Framework Programme was also to provide support for R&I with regard to alternative fuel vehicles and the related infrastructure – especially through to the Societal Challenge "Smart, green and integrated transport".

Being the AFI Directive strictly abiding to the principle of technical neutrality, no direct reference was made to any partnership instrument or programme

UNIFE repeatedly stressed that continued R&I efforts are necessary to improve the competitiveness of alternative propulsion systems' solutions, with a preferable focus for hydrogen fuels cells and battery-powered technology.

With regard to rail, UNIFE called for closer synergies between the forthcoming Joint Undertakings "Europe's Rail" and "Clean Hydrogen", within the Horizon Europe Framework Programme. Hydrogen's collaborative research would be crucial to accelerating the production and integration of hydrogen components in the rail sector

#### **AFI Regulation proposal**

- In the "Explanatory Memorandum", it is pointed out that European research and innovation can drive, navigate, and accelerate the transformative Green Deal agenda – to which the AFI Regulation is instrumental.
- In the very same "Explanatory Memorandum", the European Commission omits "Europe's Rail Joint Undertaking" among those partnerships which are expected to play a key role in delivering a climateneutral and environmentally friendly mobility.
- According to the "Explanatory Memorandum", the primary synergies for Clean Hydrogen JU should be with Clean Aviation JU and the Zero Emissions Waterborne Transport partnership.
- In the complementary Communication "A strategic rollout plan to outline a set of supplementary actions to support the rapid deployment of alternative fuels infrastructure", the Commission does point out the importance of synergies between Europe's Rail JU and Clean Hydrogen JU in order to overcome technological barriers and make fuel-cell trains commercially viable.

 In each progress report, submitted by Member States to the Commission on the implementation of the national NPF, the annual public budget allocated to support alternative fuels RTD&D will have to be included.

<u>ANNEX I (7) – Reporting</u>	Extract of the Explanatory	Extract of COM(2021) 560 final (page 13)
The progress report referred to in	<u>Memorandum (page 5)</u>	[]
Article 14(1) of the Regulation shall	[]	Over the coming years, three specific
include at least the following	Next to the legislative proposal, the	technological barriers need to be overcome
elements:	Commission will address the need for	before hydrogen fuel-cell technology can be
[]	additional research and innovation	considered for trains as commercially viable.
7) research, technological	(R&I) activities, in particular through the	These barriers are:
development and demonstration	co-programmed Zero Emissions	1) large-scale demonstration of multiple-
(RTD&D): annual public budget	Waterborne Transport partnership	unit train fleets;
allocated to support alternative	proposed by the Waterborne	2) development, engineering and
fuels RTD&D, broken down by fuel	Technology Platform under Horizon	prototype operation of shunters or
and its origin, differentiating	Europe, the Clan Sky 2 Joint Undertaking	mainline locomotives;
between fossil and renewable	and the Clean Hydrogen Joint	3) technology development for optimised
forms, and by transport mode.	Undertaking which works in synergy	hydrogen storage system for Fuel Cell
	with these two transport partnerships.	Hydrogen (FCH) rail applications.
	[]	These three high-priority topics will be the
		focus of R&I work, possibly by stepping up
		coordination between future European
		Partnership for transforming Europe's rail
		system and European Partnership for Clean
		Hvdroaen.
		[]

#### **UNIFE's assessment**

- UNIFE <u>welcomes</u> the explicit assertion of the R&I relevance for the development of clean technologies alternative to fossil fuels, as well as the established linkage between Horizon Europe and the AFI Regulation.
- UNIFE <u>welcomes</u>, in the Communication's strategic roll-out plan, the pivotal role attributed to synergies between rail and hydrogen's collaborative-research in addressing technological barriers to the viability of fuel-cells hydrogen trains. However, UNIFE <u>questions</u> why these elements have been completely omitted from the Regulation's Explanatory Memorandum.
- UNIFE <u>requests</u> that a reference to Europe's Rail JU is made when outlining the R&I partnerships which are expected to deliver climate-neutral, environmentally friendly mobility. This will be just rational and wholly coherent with the objectives set in the Green Deal and the "Sustainable and Smart Mobility Strategy" as well as with the ambition held by ER JU to drive forward the green and digital transition in Europe.

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