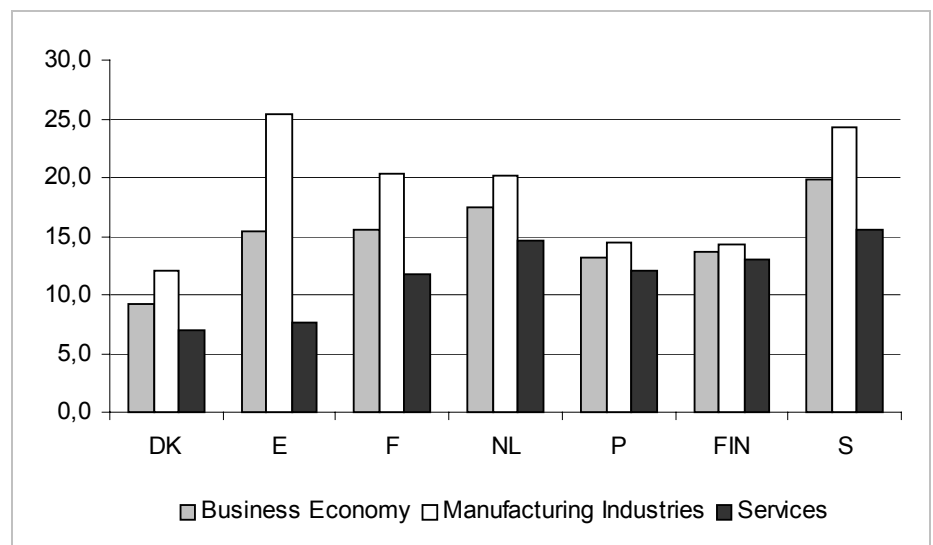


# Foreign-controlled enterprises

Between 9.2% and 19.8% of value added in Denmark, Spain, France, the Netherlands, Portugal, Finland and Sweden was generated by foreign-controlled enterprises

*Michaela Schneider*

Figure 1: Contribution of foreign-controlled enterprises to value added in seven Member States, 1999 (%)



Main findings based on pilot study results for Denmark, Spain, France, Luxembourg, the Netherlands, Portugal, Finland and Sweden:

- ◆ The share of total value added generated by foreign-controlled enterprises in 1999 in the business economy of Denmark, Spain, France, the Netherlands, Portugal, Finland and Sweden varied between 9.2% in Denmark and 19.8% in Sweden.
- ◆ In contrast, foreign-controlled enterprises accounted for less than 1.0 % of the total number of enterprises in the business economy.
- ◆ Between 6.3% (Portugal) and 17.1% (Luxembourg) of all persons employed worked for a foreign-controlled enterprise.
- ◆ The most attractive activities for foreign enterprises in terms of value added were NACE Sections D, manufacturing, and G, distributive trade.
- ◆ Portugal accounted for the highest share of intra-EU control in terms of value added with 72,4%.
- ◆ The main extra-EU foreign controllers in terms of value added were located in the USA.

## Statistics in focus

### INDUSTRY, TRADE AND SERVICES

THEME 4 – 3/2003

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Data collection on foreign-controlled enterprises began with the collection of data for reference year 1996. The results presented in this Statistics in Focus are data for reference year 1999 for eight Member States. While

Denmark, Spain, Ireland, the Netherlands, Finland, Sweden and the United Kingdom had already taken part in previous data collections, France, Luxembourg and Portugal took part in the project

for the first time. No data for Ireland and the United Kingdom are yet available and they are not included in this report; however they will be published in Eurostat's NewCronos database.

## Foreign-controlled activity in the economies

### Interpreting the data:

1. As the statistics available do not always comprehensively cover all economic activities, it was decided not to publish data on absolute levels, but only on shares of foreign-controlled enterprises in the whole economy. However, even this should be viewed with caution because the average size of foreign-controlled enterprises is considerably larger than the average figure for the whole economy. In addition, the Foreign Affiliates Trade Statistics (FATS) population is usually less than the population of the whole economy (e.g. only large enterprises are surveyed) and thus the share of foreign control is underestimated.
2. The notion of control implies the ability to direct an enterprise and determine its strategy. This ability can be exercised by an investor holding the majority (more than 50%) of the shares. Neither enterprises controlled by the reporting economy nor enterprises under multiple minority ownership are included in the FATS population. Enterprises under multiple minority ownership are those with two or more shareholders (foreign or of the reporting economy) each holding between 10% and 50% of the shares.
3. In calculating the aggregates for the business economy, manufacturing industries and services, different aggregations have been used for different countries because data were missing for individual activities in individual reporting countries. As such, results for different countries can represent different activity coverage which may imply under- or overestimation.

Table 1: Contribution of foreign-controlled enterprises to business economy in eight Member States, 1999 (%)

Member State	Number of enterprises	Turnover	Value added at factor cost	Number of persons employed 1)
Denmark	0.4	10.5	9.2	7.2
Spain	0.5	18.9	15.4	8.8
France	0.5	17.0	15.6	14.2
Luxembourg*	0.8	23.2	17.1	17.1
Netherlands	0.7	22.3	17.4	10.3
Portugal	0.4	14.3	13.2	6.3
Finland	0.9	16.2	13.7	12.2
Sweden	0.9	22.1	19.8	15.7

1) For France and Luxembourg the number of employees is used as a proxy

Table 1 presents an overview of the impact of foreign-controlled enterprises within the business economy in eight Member States. It shows that foreign affiliates account for a significant share of turnover and value added and a low share of number of enterprises.

Whilst less than 1.0% of enterprises are foreign-controlled, the share of turnover generated by foreign-controlled enterprises varied between 10.5% and 23.2%. The share of foreign-controlled enterprises in total value added exceeded 10% in six Member States and was slightly below only in Denmark (9.2%). The highest share

was in Sweden, where nearly one-fifth of the value added was generated by foreign-controlled enterprises.

Measured in terms of employment, the highest level of foreign control was recorded in Luxembourg (17.1%), whilst the highest share of value added (19.8%) was found in Sweden which - together with Finland - also had the highest share of number of enterprises (0.9%).

The lowest shares of number of enterprises (0.4%), turnover (10.5%) and value added (9.2%) were all recorded in Denmark, whilst Portugal had the lowest percentage of persons employed in foreign-

controlled enterprises (6.3%).

In most countries the share of enterprises under foreign control in the business economy is greater in terms of turnover and value added than in terms of employment. This shows that labour productivity is higher for foreign-controlled enterprises. As Tables 2 and 3 show, this is particularly true in the manufacturing industries.

Table 2: Contribution of foreign-controlled enterprises to manufacturing industries in eight Member States, 1999 (%)

Member State	Number of enterprises	Turnover	Value added at factor cost	Number of persons employed 1)
Denmark	0.5	11.4	12.1	8.8
Spain	0.8	29.0	25.4	15.0
France	0.4	13.0	20.3	13.0
Luxembourg*	2.8	33.3	:	23.3
Netherlands	0.9	24.0	20.2	12.7
Portugal	0.4	15.4	14.4	7.5
Finland	0.8	15.3	14.3	13.9
Sweden	1.0	25.4	24.4	19.9

1) For France and Luxembourg the number of employees is used as a proxy

Table 3: Contribution of foreign-controlled enterprises to market services in eight Member States, 1999 (%)

Member State	Number of enterprises	Turnover	Value added at factor cost	Number of persons employed 1)
Denmark	0.4	10.0	7.0	6.1
Spain	0.4	12.7	7.6	5.4
France	0.5	15.9	11.7	14.0
Luxembourg*	0.5	17.5	:	8.3
Netherlands	0.6	21.2	14.6	8.8
Portugal	0.4	13.5	12.1	5.1
Finland	0.9	17.0	13.0	10.5
Sweden	0.9	19.7	15.6	12.6

1) For France and Luxembourg the number of employees is used as a proxy

Tables 2 + 3: Regarding turnover, value added and employment, foreign control is relatively less important in market services than in manufacturing industries. For turnover and value added, the

biggest differences were found for Spain with differences of 16.3 and 17.8 percentage points respectively. For employment the biggest difference was in Luxembourg with 15.0 percentage points.

There were two exceptions: in Finland and France turnover was higher in the market services than in manufacturing industries.

Table 4 shows the distribution of foreign-controlled enterprise activity between manufacturing industries and the service sector. It shows that the majority of foreign-controlled value added, ranging from 52.6% in Portugal to 72.3% in Spain, was generated by foreign-controlled enterprises in the manufacturing

industries, whilst a vast majority of foreign-controlled enterprises - between 60.2% in the Netherlands and 84.0% in Luxembourg - were in fact in the service sector. The differences in the number of persons working for a foreign affiliate in the manufacturing industries and service sectors were narrower.

In Spain 17.2% of the foreign-controlled enterprises were in manufacturing industries, but generated 72.3% of value added and employing 60.6% of the persons working in foreign-controlled industries.

Table 4: Distribution of foreign-controlled enterprise activity between manufacturing industries and service sector in eight Member States, 1999 (%)

Member State	Number of enterprises		Turnover		Value added at factor cost		Number of persons employed 1)	
	Manufacturing Industries	Services	Manufacturing Industries	Services	Manufacturing Industries	Services	Manufacturing Industries	Services
Denmark	33.3	66.7	37.4	62.6	56.1	43.9	39.5	60.5
Spain	17.2	82.8	58.2	41.8	72.3	27.7	60.6	39.4
France	35.7	64.3	56.9	43.1	59.4	40.6	47.6	52.4
Luxembourg*	16.0	84.0	35.9	64.1	:	:	58.4	41.6
Netherlands	39.8	60.2	42.0	58.0	57.8	42.2	48.0	52.0
Portugal	30.5	69.5	43.1	56.9	52.6	47.4	59.0	41.0
Finland	29.2	70.8	45.5	54.5	58.2	41.8	55.4	44.6
Sweden	27.6	72.4	48.2	51.8	58.4	41.6	53.9	46.1

1) For France and Luxembourg the number of employees is used as a proxy

## Development of foreign control over time within three Member States

### Interpreting the data:

Comparisons over time of data on foreign controlled enterprises need to be viewed with caution. First, there are the usual problems of comparability that may be associated with time-series data. Two specific examples are worth mentioning:

1. Changes that are caused by improvements in the way the survey is conducted, e.g. the reduction of cut-off thresholds can imply the inclusion of smaller enterprises and thus a downward trend in a characteristic.
2. Reclassification effects, which may occur as a result of a change in the principal activity of the foreign controlled enterprise, causing the enterprise to be re-classified under another NACE heading.

In addition, the following more specific points need to be borne in mind when interpreting data on foreign-controlled enterprises:

1. Changes in the structure and composition of large enterprise groups (which themselves are often spread across several countries) may have significant effects on the data. For example, an enterprise may be classified as a foreign-controlled enterprise in one reference period, but considered in the next as controlled by the reporting economy (even if the immediate controller remains the same).
2. Businesses whose control changes tend to display a higher incidence of restructuring, which can also play a role in "distorting" the data. As a result businesses may move in and out of the FATS data set within a relatively short period of time. Such cases become more acute when the changes of control are driven by the motivation to acquire only certain parts of an enterprise (or enterprise group) and the new owner subsequently disinvests the remaining assets.
3. When considering changes in foreign control over time it is unfortunately not possible to distinguish between the changes that result from internal growth of the affiliates already present in an activity and the effects of external growth resulting from new affiliates entering the activity.

Table 5: Contribution of foreign-controlled enterprises to the business economy in three Member States, 1999 (%)

Member State	Value added		Number of persons employed	
	1997	1999	1997	1999
Netherlands	14.6	17.4	9.8	10.3
Finland	11.7	13.7	9.7	12.2
Sweden	14.9	19.8	12.4	15.7

Table 5 shows the inter-temporal developments of the contribution of foreign-controlled enterprises to both value added and number of persons employed in the business economy. The table shows that there was an increase between

1997 and 1999 in the three countries for which comparable data are available. The fastest growth was observed in Sweden with an increase of 4.9 percentage points for value added and 3.3 percentage points for the numbers of persons

employed, although in Sweden the share of foreign-controlled enterprises in value added and employment of the business economy was already high in 1997 compared to the Netherlands and Finland.

Figures 2+ 3: Changes in the contribution of foreign-controlled enterprises to the total values in three Member States (percentage points)



As Figures 2 + 3 show, in the service sector in the Netherlands and generally in Finland and Sweden, the contribution of foreign-controlled enterprises to the host

country's economy was higher than two years ago, in terms of both value added and number of persons employed. For manufacturing industries in the Netherlands there

was a downturn in both value added (1.5 percentage points) and number of persons employed (1.0 percentage points).

## Activities attracting foreign enterprises

Table 6: Share of foreign-controlled enterprises in total value added at the section level of NACE Rev. 1 in seven Member States, 1999 (%)

Member State	Manufacturing Industries				Services			
	C	D	E	F	G	H	I	K
Denmark	..	11.5	0	7.5	13.1	3.5	1.0	5.5
Spain	0.3	26.0	23.9	:	10.7	6.8	3.3	6.4
France	24.1	26.6	0	1.3	11.9	6.2	2.7	17.8
Netherlands	:	27.6	..	3.8	18.7	13.9	6.5	:
Portugal	..	19.0	..	3.8	17.1	8.3	7.8	9.5
Finland	..	16.0	..	9.7	20.8	8.2	5.3	11.1
Sweden	..	30.2	6.9	5.6	21.6	14.6	13.5	12.0

Table 6: Looking at the figures at NACE Rev. 1 Section level, it is possible to identify particular areas of the business economy that attract foreign affiliates. In five Member States (Spain, France, the Netherlands, Portugal, Sweden) the highest contribution of foreign-controlled enterprises to the total value added was found in Section D, manufacturing. In Sweden 30.2% of all value added in manufacturing was generated by foreign-controlled enterprises. The lowest share was in Denmark (11.5%). High

contributions were also found in NACE Section G, distributive trade. The highest proportion was again in Sweden (21.6%), the lowest in Spain (10.7%). In Finland and Denmark, NACE Section G was the most attractive activity for foreign-controlled enterprises, contributing 20.8% and 13.1% respectively to the total value added. Low percentages were found for NACE Section E, electricity, gas and water supply, NACE Section F, construction, and NACE Section I, transport, storage and

communication. For most countries these sections' contribution to total value added was below 10%. In NACE section H, hotels and restaurants, the contribution to the reporting countries' value added was above 10% for two countries: Sweden (14.6%) and the Netherlands (13.9%). The highest share in NACE section K, real estate, renting and business activities, was in France with a contribution to the total value added in this section of 17.8%.

## Breakdown of foreign controllers

Figure 4: Breakdown of value added generated by foreign-controlled enterprises in the business economy in seven Member States, 1999 (%)

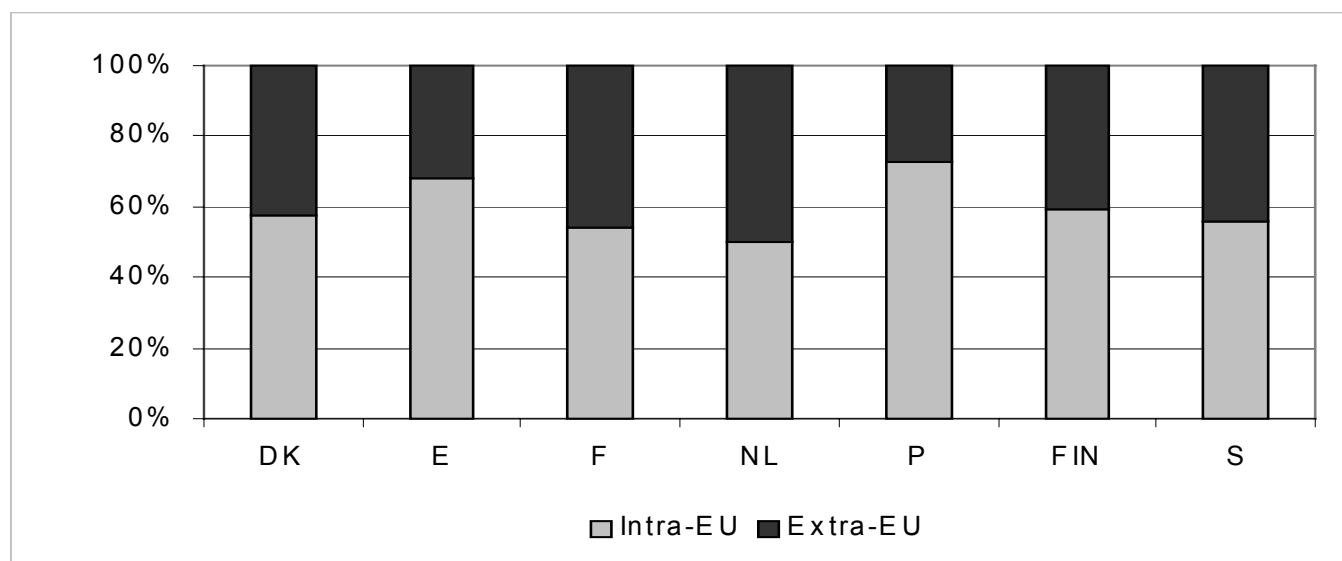


Figure 3 shows the breakdown of foreign control in the business economy between intra- and extra-EU partners. The highest share of

intra-EU control in 1999 was found in Portugal (72.4%), followed by Spain (67.9%). The Netherlands was the only Member State where

extra-EU control accounted for the majority share of total foreign control (54.0%).

Table 7: Share of intra-EU control in seven Member States, based on the value added generated, 1999 (%)

Member State	Business Economy		Manufacturing Industries		Services	
	Intra-EU	Extra-EU	Intra-EU	Extra-EU	Intra-EU	Extra-EU
Denmark	57.6	42.4	61.7	38.3	52.4	47.6
Spain	67.9	32.1	63.7	36.3	78.9	21.1
France	54.2	45.8	53.3	46.7	55.4	44.6
Netherlands	46.0	54.0	44.9	55.1	47.6	52.4
Portugal	72.4	27.6	73.5	26.5	71.2	28.8
Finland	59.3	40.7	54.0	46.0	66.8	33.2
Sweden	56.0	44.0	55.7	44.3	56.3	43.7

Table 7: There is almost no difference in the shares of intra- and extra-EU control between manufacturing industries and services' sector for Sweden and Portugal. For Spain, France, Finland

and the Netherlands intra-EU control was higher in the services sector, while for Denmark it was higher in manufacturing. Portugal is the Member State with the highest share of intra-EU control

for manufacturing industries, whilst in the Netherlands the shares of extra-EU control are higher than intra-EU control for both manufacturing industries and service sector.

Table 8: Top five controlling countries in seven Member States, based on the value added generated, 1999 (%)

Member State	Country of origin														
	Business Economy					Manufacturing industries					Services				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Denmark	US	NL	D	S	NO	US	NL	S	D	NO	US	D	S	UK	NL
Spain	US	F	D	NL	UK	US	F	D	NL	CH	F	UK	NL	D	US
France	US	NL	UK	D	CH	US	NL	UK	D	CH	US	NL	UK	CH	D
Netherlands	US	UK	D	F	J	US	UK	D	B	F	US	UK	D	F	J
Portugal	D	US	F	UK	E	D	US	F	E	UK	UK	US	F	D	NL
Finland	S	US	NL	CH	NO	S	US	CH	NO	NL	S	US	NL	D	UK
Sweden	US	UK	FIN	NL	D	US	UK	FIN	NL	CH	US	UK	NL	D	F

Enterprises from the USA were by far the most important foreign controllers, occupying first place in five Member States (Denmark, Spain, France, the Netherlands and Sweden) and second place in the other countries (Portugal and Finland).

Other than the United States, the rankings were dominated by other

EU Member States. The Netherlands and the United Kingdom were each present in five countries reporting data.

The ranking was also dominated by neighbouring countries. Sweden was the most important partner for Finland, and France took rank two of the top five for Spain. Enterprises from Germany were the most

important foreign controllers in Portugal.

For the manufacturing industries the ranking was similar to the ranking in the business economy. In the services' sector, France occupied top place in neighbouring Spain while the UK was top in Portugal.

Table 9: Top five controlling countries in seven Member States in the business economy, based on the value added generated and their shares in total foreign control, 1999 (%)

Member State	Country of origin										Sum of Top 5
	1	2	3	4	5	1	2	3	4	5	
Denmark	US	25.3	NL	16.4	D	14.1	S	12.3	NO	7.9	76.0
Spain	US	23.7	F	23.3	D	16.6	NL	12.6	UK	5.5	81.7
France	US	30.3	NL	14.3	UK	12.4	D	11.7	CH	11.2	79.8
Netherlands	US	38.7	UK	16.0	D	11.1	F	7.1	J	4.0	76.9
Portugal	D	20.9	US	16.5	F	13.4	UK	12.9	E	8.5	72.2
Finland	S	23.1	US	18.7	NL	9.8	CH	9.3	NO	7.4	68.3
Sweden	US	25.7	UK	13.6	FIN	11.5	NL	10.4	D	7.6	68.8

Table 9 shows that more than two-thirds of the value added generated by foreign-controlled enterprises was generated by the top five controlling countries. The share of the most important controlling

country outside the EU, the USA, accounted for around one quarter to one third of the value added generated by foreign-controlled enterprises. In Finland and Portugal foreign control through US

enterprises accounted for around one sixth of the value added generated by foreign-controlled enterprises.



## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

### The Project

Statistics describing the overall activity of foreign-owned enterprises are often termed "Foreign Affiliates Trade Statistics" or FATS. Statistics on foreign-controlled affiliates in the reporting economy are termed inward FATS, whilst statistics on foreign affiliates controlled by the reporting economy are termed outward FATS. The statistics published in this report relate to inward FATS.

The legal basis for the project is Annex 1 section 10 of the Structural Business Statistics (SBS) Council Regulation (EC, EURATOM) No. 58/97 of 20 December 1996.

After a first phase of pilot studies to collect data on FATS, Eurostat launched again a pilot study to collect data for reference year 1999 and this information provides the basis of the results in this report. The following countries have been involved in the project: Denmark, Spain, Luxembourg, France, Ireland, the Netherlands, Finland, Portugal, Sweden and the United Kingdom. The data for Ireland and the United Kingdom are not included in this report because they were not yet available, however they will be published in Eurostat's database NewCronos. Luxembourg provided data for three variables number of enterprises, turnover and number of employees, a section level of NACE Rev. 1. These data were collected in the Foreign Direct Investment Statistics framework.

### Methodological Notes

The breakdown of the (FATS) variables is based on the concept of control. Control over an enterprise is defined as the ability of an entity to determine the general corporate policy of the enterprise by choosing appropriate directors if necessary. However, control is often difficult to determine and in practice, in the data collection process the share of ownership is often used as a proxy for control.

In the case of multiple owners the FATS owner is determined according to the majority ownership rule. Direct majority ownership is defined as owning directly more than 50% of the voting shares of an incorporated enterprise or the equivalent of an unincorporated enterprise.

A non-resident enterprise in the SBS regulation is the equivalent of a non-resident "person" in GATS. "Person" means, in this context, either a natural (physical) person or a legal person. Thus the non-resident enterprise can be:

- a non-resident natural/physical person; or
- a non-resident legal person; or
- a group of non-resident persons, all resident in the same country and behaving as a unique person.

FATS statistics are collected according to the concept of the ultimate beneficial owner (UBO). The UBO is the first person in the chain – beginning with and including the first foreign parent – which is not majority owned by another person.

The total values of variables are allocated to the UBO and values of variables are not split according to shares of ownership, nor double counted.

The country of origin is the country in which the controlling unit is resident.

The ownership is determined at the end of the reference year.

The results presented are based on non-confidential data. Most of the data in this report are presented at an aggregated level to provide global figures. In some cases, aggregates have been calculated despite the fact that one or more constituent parts of the aggregate are confidential or not available. The missing data for individual activities in the reporting countries are summarised in the table below.

As the data available do not always comprehensively cover all economic activities, the data used for this report are only data on shares. Data on absolute levels

are published in Eurostat's database NewCronos.

Economic variables

Data was collected for the following variables: number of enterprises; turnover; production value; value added at factor cost; total purchases of goods and services; purchases of goods and services purchased for resale in the same condition as received; personnel costs; gross investment in tangible goods; number of persons employed and number of employees.

The definitions of the characteristics are laid down by Commission Regulation (EC) No. 2700/98 of 17 December 1998.

### Economic Activities

Data were requested for Sections C (mining and quarrying), D (manufacturing), E (electricity, gas and water supply, F (construction), G (wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods), H (hotels and restaurants), I (transport, storage and communication), J (financial intermediation) and K (real estate, renting and business activities) of the statistical classification of economic activities in the European Community (NACE Rev. 1).

The aggregate business economy includes Sections C to K, whilst manufacturing industries is composed of NACE Sections C to F and the services' sector of G to K.

NACE Section J was excluded from the publication and thus from the aggregates business economy and services' sector for reasons of comparability because only France, Luxembourg and Finland supplied data for this section.

### Symbols

0 Less than half the final digit shown  
 .. Confidential data. Data not conclusive or withheld owing to non-disclosure practice.  
 : Data not available  
 \* Provisional or estimated figures

#### Exceptions to the activity coverage for calculated aggregates for reference year 1999:

<b>DK</b>	Business Economy, Services' Sector and NACE Section K excluding 70.20
<b>E</b>	Business Economy and Manufacturing Industries excludes Section F
<b>L</b>	Business Economy, Services' Sector and NACE Section K excludes 72, 73, 74.13, 74.4, 74.5, 74.7
<b>NL</b>	Business Economy and Services' Sector excludes Section I for number of enterprises and turnover
<b>NL</b>	Business Economy and Manufacturing Industries excludes NACE Section C
<b>NL</b>	Business Economy and Services' Sector excludes NACE Section K

#### Exceptions to the activity coverage for calculated aggregates for reference year 1997:

<b>NL</b>	Business Economy, Manufacturing Industries and NACE Section E excludes 40
<b>NL</b>	Business Economy, Services' Sector and NACE Section G excludes 52.1, 52.3, 52.5, 52.6 and 52.7
<b>NL</b>	Business Economy, Services' Sector and NACE Section K excludes 70 and 73
<b>FIN</b>	Business Economy and Manufacturing Industries excludes NACE Section C
<b>FIN</b>	Business Economy, Services' Sector and NACE Section H excludes 55.3, 55.4 and 55.5

# Further information:

## ➤ Databases

New Cronos, Domain SBS FATS collection

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

BELGIQUE/BELGIË	DANMARK	DEUTSCHLAND	ESPAÑA	FRANCE	ITALIA – Roma
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## For information on methodology

Michaela SCHNEIDER, Eurostat/D2, L-2920 Luxembourg, Tel. (352) 4301 34998, Fax (352) 4301 32600,

E-mail: Michaela.Schneider@cec.eu.int

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