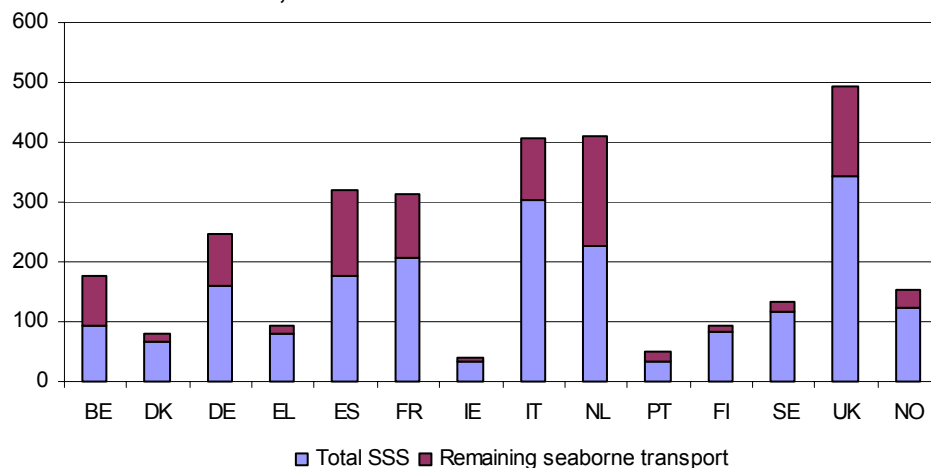


Short Sea Shipping

2000-2003

In 2003, Short Sea Shipping within the EU-15 accounted for 1.6 billion tonnes of goods, of which almost a third concerned the ports on the Mediterranean sea.

Figure 1: Share of Short Sea Shipping (SSS) in total annual turnover of tonnage - million tonnes, 2003



Highlights

Short Sea Shipping (SSS)⁽¹⁾ accounted for 63% of the entire volume of goods transported by sea in the EU-15 in the year 2003, totalling over 1.6 billion tonnes.

The United Kingdom and Italy accounted for the largest share of cargo handled in Short Sea Shipping, totalling 342 and 302 million tonnes respectively. The amount of Short Sea Shipping varied widely from one country to another.

Short Sea Shipping experienced an upturn in all the EU-15 Member States from 2002 to 2003, with the exception of the United Kingdom.

The Mediterranean and the North Sea had the largest share of SSS, with 30% (491 million tonnes handled), and 27% (448 million tonnes handled) respectively.

Liquid bulk (including liquefied gas, crude oil and oil products) played a predominant role in cargo handled in Short Sea Shipping; in France, Italy and the Netherlands in particular, it accounted for more than 60% of total cargo

In all the maritime regions, liquid bulk is the most common SSS cargo, both leaving and entering the EU-15, however, its share varied from one region to the next, from 77% in the Black Sea to 39% in the Atlantic Ocean.

(1) Short Sea Shipping (SSS), as covered in this issue of "Statistics in Focus", deals with the transport of goods between ports in the EU-15 and Norway, on the one hand, and ports situated in geographical Europe, on the Mediterranean and Black Seas on the other, i.e. ports in EU countries (Belgium, Denmark, Germany; Estonia; Greece; Spain; France, Ireland, Italy; Cyprus, Latvia, Lithuania, Malta, the Netherlands, Poland, Portugal, Slovenia; Finland; Sweden and the United Kingdom), EEA countries (Iceland and Norway), Baltic Sea countries (Russia), and Mediterranean countries (Albania, Algeria, Bosnia-Herzegovina, Croatia, Egypt, Israel, Lebanon, Libya, Montenegro, Morocco, Syria, Tunisia and Turkey) and Black Sea countries (Bulgaria, Georgia, Moldova, Romania, Russia, Turkey and Ukraine).

Statistics in focus

TRANSPORT

2/2005

Author

Georges XENELLIS

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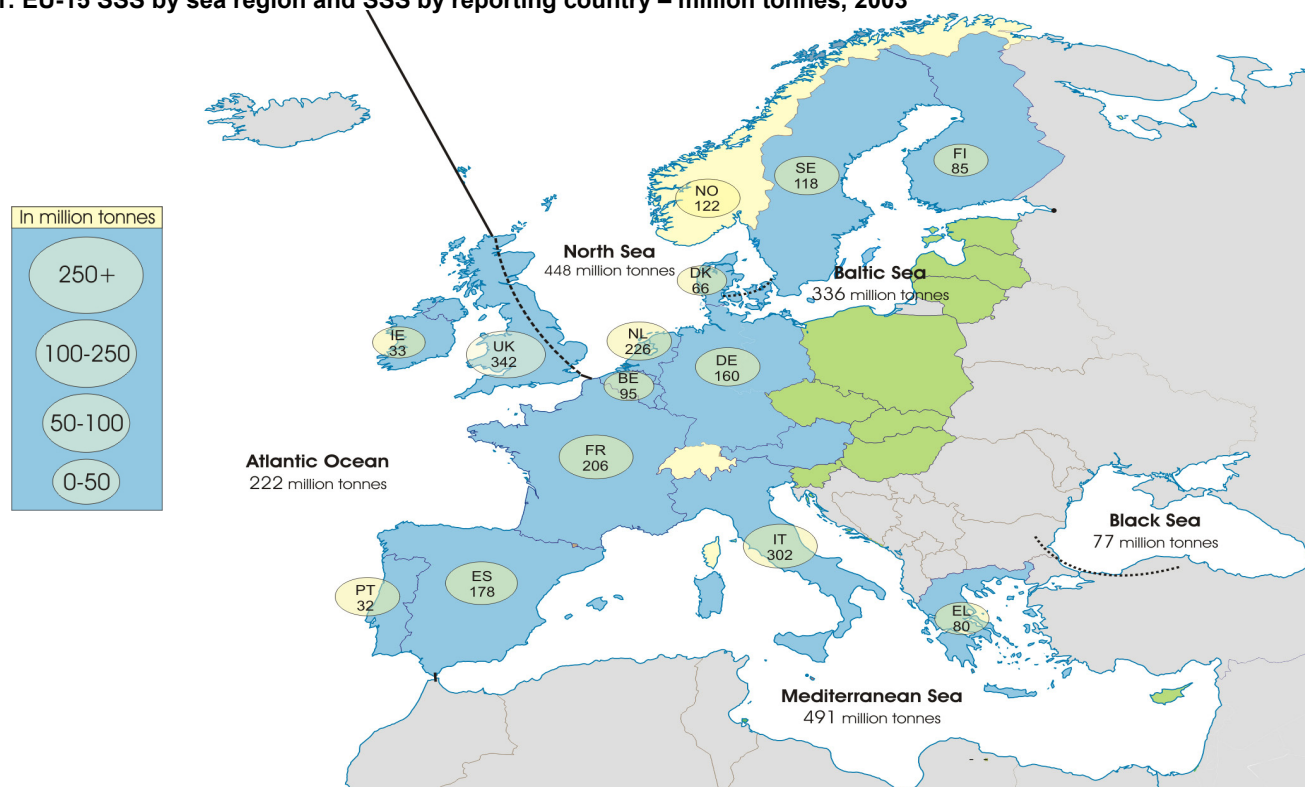
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Short Sea Shipping by Reporting Country and Sea Region

Map 1: EU-15 SSS by sea region and SSS by reporting country – million tonnes, 2003



The majority of sea shipping which took place in 2003 for each of the EU-15 countries and Norway (Figure 1) was Short Sea Shipping (SSS). The share of SSS in the total seaborne transport is particularly pronounced in Finland (92%), Greece (86%)⁽¹⁾, Denmark (83%) and Ireland (80%). However, it is important to remember that these countries handle some of the largest shares of national and international intra-EU-15 transport. In 2003 the United Kingdom handled 342 million tonnes of cargo in Short Sea Shipping, accounting for 18% of total SSS in the EU-15. It was followed by Italy and the

Netherlands with 16% and 12% shares, respectively. The amount of cargo handled by SSS transported from EU-15 ports to Mediterranean ports amounted to 491 million tonnes, i.e. 30% of total SSS declared by the EU-15. The North Sea followed close behind, with its ports handling 448 million tonnes. In contrast, the amount of cargo handled by SSS in the Baltic Sea, together with cargo intended for or leaving ports in the North Sea, accounted for almost half of the total assets declared by the EU-15 (47%). The Black Sea accounted for only 5% of the EU-15 total SSS.

Figure 2: Breakdown of SSS in the EU-15 by sea region – % of tonnes, 2003

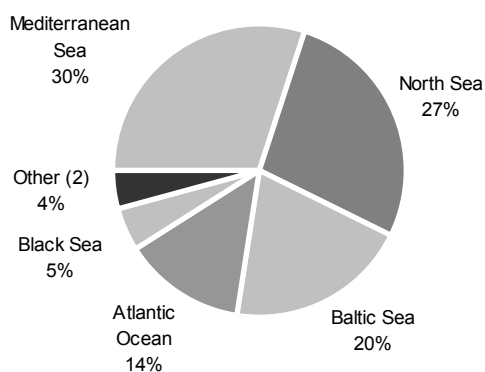


Table 1: SSS by reporting country and by sea region – 1000 tonnes, 2003

	Atlantic Ocean	Baltic Sea	Black Sea	Mediterranean Sea	North Sea	Other (2)
BE	13 279	19 314	687	20 252	40 604	617
DK	3 240	34 606	7	673	26 707	418
DE	10 621	74 818	479	10 053	61 722	2 627
EL ⁽¹⁾	1 205	5 731	10 081	58 076	3 302	1 357
ES	33 946	16 751	11 092	83 259	24 840	7 778
FR	43 859	17 786	14 859	55 133	47 617	26 355
IE	16 995	1 401	98	656	13 924	178
IT	7 809	17 503	33 981	216 792	12 566	13 331
NL	28 261	56 696	2 583	41 360	85 274	11 913
PT	10 081	2 289	1 733	9 622	8 405	133
FI	3 726	48 557	61	2 037	29 914	287
SE	3 501	62 619	40	2 002	47 214	2 876
UK	111 385	28 863	873	22 393	176 377	1 981
EU-15	221 872	336 235	76 573	490 554	448 047	69 497
NO	11 660	13 445	5	5 169	86 569	5 485

¹⁾ Estimated - ⁽²⁾ cf. methodological notes

A considerable share of the cargo handled by Mediterranean ports (42%) – 217 million tonnes – was loaded or unloaded in Italian ports. In 2003, Italian ports also handled more goods loaded or unloaded in the Black Sea ports (44%) than any other EU-15 ports. In the Atlantic Ocean and the North Sea, SSS largely came from or was destined for British ports (30% and 39% respectively). Short Sea Shipping in the Baltic Sea

from or to EU-15 ports was mainly intended for or came from four Member States: Germany, Sweden, the Netherlands and Finland, which accounted for 63%. Table 1 also shows us that, with the exception of Portugal, the Netherlands and Belgium, all the countries carry out the majority of their Short Sea Shipping with partner ports located on seas on which both have a coastline.

Table 2: Growth in SSS in the EU-15 and Norway – million tonnes, 2000-2003

	2000			2001			2002			2003			Annual rate of growth (Total)	
	Inward	Outward	Total	Inward	Outward	Total	Inward	Outward	Total	Inward	Outward	Total	Average rate 2000-2003	2002-2003
BE	59	36	94	58	35	93	56	36	92	56	39	95	0.4%	3.1%
DK	31	33	59	33	33	62	34	35	62	35	37	66	3.4%	5.4%
DE	107	52	156	108	53	158	104	53	155	108	55	160	0.8%	3.7%
EL ⁽¹⁾	63	43	86	53	38	78	51	36	73	57	41	80	-2.5%	8.7%
ES	99	45	131	124	58	159	134	58	171	138	63	178	10.6%	4.1%
FR	154	64	212	144	61	198	143	61	198	148	65	206	-1.0%	4.1%
IE	17	10	27	19	10	29	21	11	32	22	11	33	7.2%	3.7%
IT	227	102	279	227	96	277	234	108	291	244	115	302	2.7%	3.6%
NL	161	57	217	162	56	218	168	58	226	170	56	226	1.3%	0.1%
PT	25	10	31	25	10	31	25	10	31	25	11	32	1.1%	2.7%
FI	37	33	70	45	38	78	46	39	80	50	39	85	6.3%	6.1%
SE	66	62	118	62	59	111	63	58	114	67	59	118	0.0%	4.0%
UK	171	188	308	222	178	353	220	174	345	216	173	342	3.6%	-0.9%
EU-15	1 217	735	1 538	1 282	725	1 586	1 299	737	1 604	1 336	765	1 643	2.2%	2.4%
NO	:	:	:	:	:	:	54	81	128	51	81	122	:	-4.1%

(1) Estimated: cf. methodological notes

The totals in Table 2 exclude the double accounting of flows which may occur at the national and international levels intra-EU-15. These totals may therefore differ from the sum of inward and outward flows. (cf. methodological notes)

All the countries except Denmark and Norway sent out fewer goods than they received by SSS. In 2003, 75% of SSS handled by the Netherlands was unloaded in its ports, while the equivalent figures for Denmark and Norway were only 49% and 38% respectively.

The EU-15 assessed the average annual rate of growth in SSS at 2.2% for 2000-2003.

Only two countries – Greece (-2.5%) and France (-1.0%) – experienced a drop in SSS over this period, although both experienced positive growth from 2002 to 2003.

Short Sea Shipping experienced an upturn in all the Member States belonging to the EU-15 from 2002 to 2003, with the exception of the United Kingdom, which contracted slightly (-0.9%). Over the last year, the greatest growth was experienced by Greece ⁽¹⁾ (+8.7%) and Finland (+6.1%). Over the period as a whole, Spain, which is ideally located between the Atlantic Arc and the Latin Arc, also experienced a high growth rate.

Short Sea Shipping by Type of Cargo

Figure 3: Distribution of SSS in the EU-15 by type of cargo – % of tonnes, 2003

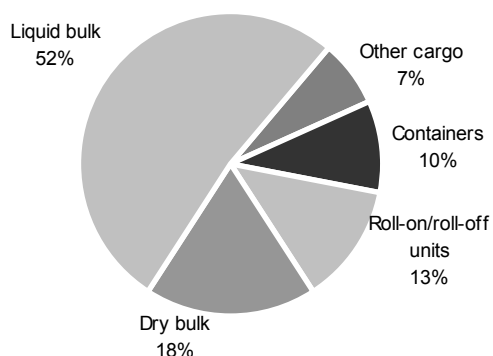


Figure 3 clearly shows that liquid bulk played a predominant role in cargo handled in the EU-15 by Short Sea Shipping. At 853 million tonnes, it accounted for 52% of total SSS in the EU-15. Dry bulk, at 18% of the total, or 301 million tonnes, was the second most important, but it was considerably less than liquid bulk. Roll-on/roll-off units came next, at 13% of total SSS, followed by containers, at no higher than 10%. These amounted to 212 and 158 million tonnes respectively, and were the least handled type of cargo, despite the fact that they are particularly well-suited to Short Sea Shipping. However, the rates of growth were higher than those for all the other types of cargo.

Figure 4: Distribution of SSS in the EU-15 by type of cargo for each sea region – % of tonnes, 2003

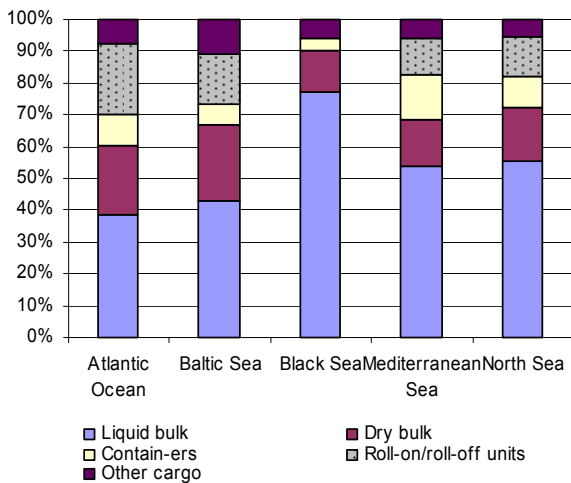


Figure 4 shows the distribution by type of cargo handled in Short Sea Shipping from or to the EU-15 for each sea region of origin or destination. Once again, liquid bulk was clearly the most handled type of cargo. This is true for every sea region, and in particular for ports located on the Black Sea, where 77% of the volume of cargo handled in Short Sea Shipping concerned liquid bulk. Liquid bulk was also the most handled type of cargo for Atlantic Ocean ports. However, its share (39%) was not as high as in the other sea regions. In this region, roll-on/roll-off units and dry bulk each accounted for 22% of the volume of cargo handled in Short Sea Shipping by the EU-15. This was probably due to the many initiatives fostering the growth of SSS in the English Channel and the Atlantic Arc from the Iberian peninsula to the United Kingdom, particularly with regard to the transport of ro-ro units. Dry bulk was the second most important type of cargo throughout the EU-15 sea regions involved in SSS.

Figure 5: Distribution of SSS in the EU-15 and in Norway by type of cargo – % of tonnes, 2003

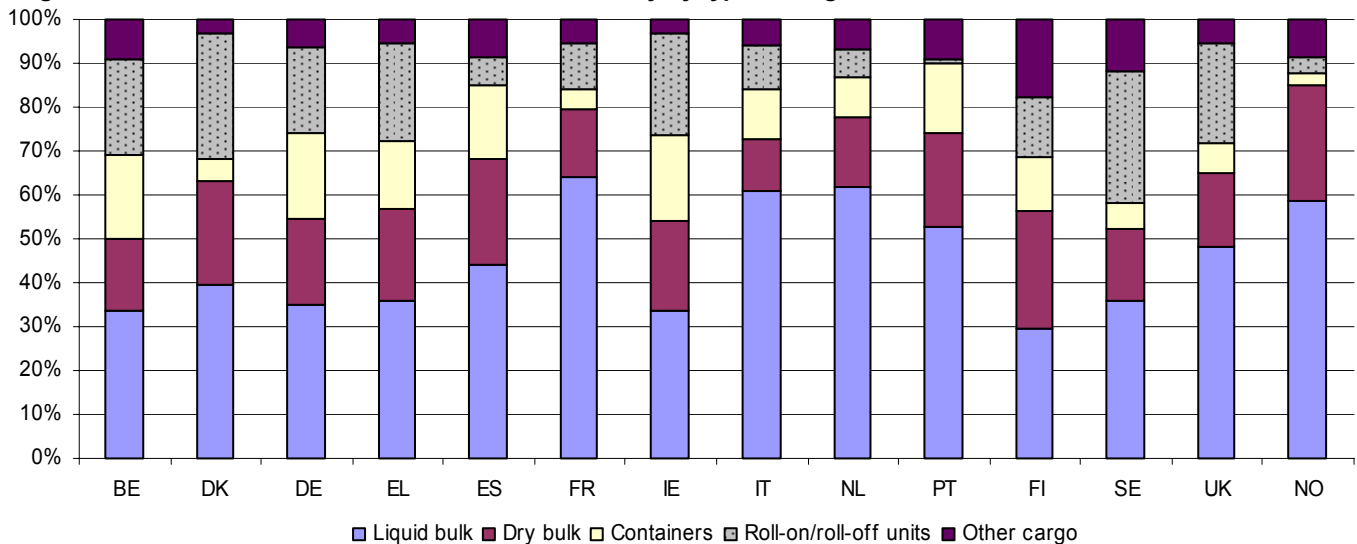


Figure 5, like Figure 4, shows that liquid bulk was a very important component of SSS. It was the most common type of good in each EU-15 country and in Norway. This was particularly true of France (64%), the Netherlands (62%) and Italy (61%).

With regards to dry bulk and ro-ro units, the United Kingdom was the EU-15 Member State with the largest volume of cargo handled by SSS, totalling 57 and 77 million tonnes respectively.

With regard to liquid bulk and containers, Italy accounted for the largest volume, totalling 183 and 35 million tonnes respectively.

Ireland handled the lowest volumes of liquid and dry bulk by SSS, Denmark handled the fewest containers, and Portugal brought up the rear for ro-ro units.

Table 3: SSS in the EU-15 and in Norway by type of cargo – tonnes, 2003

	Liquid bulk	Dry bulk	Containers	Ro-ro units ⁽²⁾	Other cargo
BE	31 990	15 364	18 292	20 699	8 409
DK	26 000	15 402	3 403	18 746	2 099
DE	55 948	31 783	31 163	31 252	10 175
EL ⁽¹⁾	28 752	16 600	12 220	17 944	4 236
ES	78 367	42 843	29 857	11 503	15 095
FR	131 419	31 897	9 587	21 394	11 309
IE	11 254	6 674	6 571	7 667	1 087
IT	183 568	35 699	34 795	30 560	17 360
NL	139 586	35 878	20 998	14 323	15 302
PT	17 064	6 809	5 103	360	2 928
FI	24 867	22 768	10 333	11 608	15 008
SE	42 715	19 353	6 614	35 464	14 105
UK	165 260	57 140	23 456	76 601	19 415
EU-15	853 710	300 775	158 462	211 859	117 973
NO	71 561	32 253	3 741	3 968	10 810

⁽¹⁾ Estimated: cf. methodological notes

⁽²⁾ ro-ro: roll-on/roll-off

Table 4: Share of containers in SSS in the EU-15 and in Norway – 1000 TEU, 2003

	2000		2001		2002		2003		Annual rate of growth			
	Total (TEU)	of which empty	Total (TEU)	of which empty	Total (TEU)	of which empty	Total (TEU)	of which empty	Average rate 2000-2003		2002 - 2003	
									Total (TEU)	of which empty	Total (TEU)	of which empty
BE ⁽¹⁾	897	102	950	86	1 144	84	1 458	83	17.6%	-6.6%	27.4%	-1.2%
DK	423	120	419	120	424	115	446	101	1.8%	-5.6%	5.2%	-12.2%
DE	2 629	530	3 033	669	3 341	737	3 658	767	11.6%	13.1%	9.5%	4.1%
EL ⁽²⁾	1 199	284	1 148	882	1 170	962	1 227	1 040	0.8%	54.1%	4.9%	8.1%
ES	2 354	640	3 000	636	2 985	596	3 465	830	13.8%	9.1%	16.1%	39.3%
FR	956	330	1 089	332	1 246	371	1 156	362	6.5%	3.1%	-7.2%	-2.4%
IE	569	94	597	125	785	162	869	186	15.2%	25.5%	10.7%	14.8%
IT	3 026	471	3 222	471	3 866	627	4 261	737	12.1%	16.1%	10.2%	17.5%
NL	2 322	417	2 218	462	2 422	511	2 626	547	4.2%	9.5%	8.4%	7.0%
PT	558	135	603	156	629	168	663	166	5.9%	7.1%	5.4%	-1.2%
FI	879	192	972	207	1 052	208	1 115	199	8.3%	1.2%	6.0%	-4.3%
SE	626	142	651	145	742	174	657	109	1.6%	-8.4%	-11.5%	-37.4%
UK	2 975	738	3 083	865	3 299	991	3 342	1 073	4.0%	13.3%	1.3%	8.3%
EU-15	14 840	3 209	16 151	4 146	18 563	4 723	20 033	5 052	10.5%	16.3%	7.9%	7.0%
NO	:	:	:	:	461	124	493	137	:	:	6.9%	10.5%

⁽¹⁾ Belgian data for Antwerp may be subject to revision.

⁽²⁾ Estimated: cf. methodological notes

At 4.3 million TEUs (twenty foot equivalent unit) in 2003, Italy led the EU-15 Member States with regard to containers handled by SSS. It was followed by three countries: Germany, Spain and the United Kingdom. The United Kingdom handled the most empty containers at 1,1 million TEUs, closely followed by Greece.

Since 2001, the vast majority of containers handled by SSS to and from Greek ports have been empty (85% in 2003). In contrast, the share of empty containers handled by Belgium in the same year was only 6%.

For EU-15 ports taken together, the average annual rate of growth for containers handled by SSS was 10.5% for 2000-2003. The equivalent figure for empty containers was 16.3%. The increase observed over the last year (from 2002 to 2003) was less pronounced, at 7.9% for containers as a whole, and

7% for empty containers.

The most noteworthy increase was that in the handling of empty containers by Greece, which had an average annual increase between 2000 and 2003 of 54%(2), while the total number of containers handled remained almost constant.

It should also be mentioned that from 2002 to 2003 the number of containers handled by SSS in the ports of Belgium, Denmark, Portugal and Finland went up, while the number of empty containers handled dropped.

Of EU-15 and Norwegian ports, Sweden experienced the largest drop in the number of containers handled by SSS at an average of -11.5% from 2002 to 2003 for containers as a whole, and -37.4% for empty containers.

Main Ports by Type of Cargo Handled by Short Sea Shipping

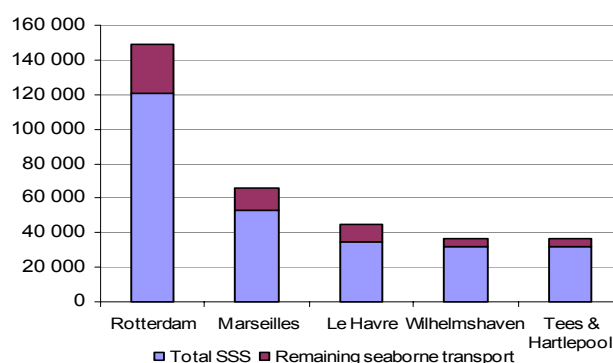
Table 5: Liquid bulk: Top 5 SSS ports – 1000 tonnes, 2003

Liquid bulk		
Ports	Total SSS (1000 tonnes)	Share of EU-15 SSS
Rotterdam	120 373	11.70%
Marseilles	53 367	5.19%
Le Havre	34 460	3.35%
Wilhelmshaven	32 016	3.11%
Tees & Hartlepool	31 944	3.10%

Of all EU-15 ports, Rotterdam handled the most liquid bulk by SSS. It alone accounted for 12% of the EU-15's liquid bulk transported by SSS.

The second largest port, handling considerably less, was Marseille, followed by Le Havre, Wilhelmshaven and Tees &

Figure 6: Share of SSS in liquid bulk handled – 1000 tonnes, 2003



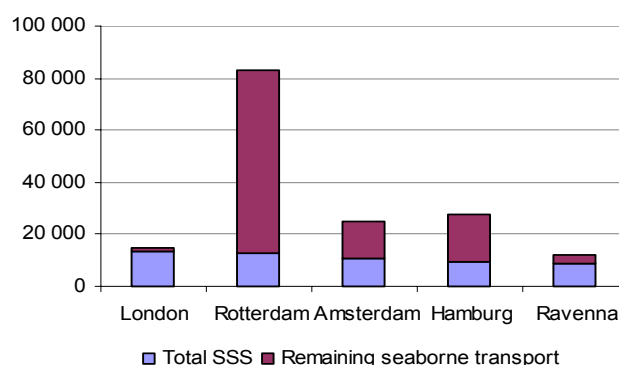
Hartlepool. SSS accounted for the lion's share of the total cargo handled by these ports. In particular, 87% of the volume offhanded in Tees & Hartlepool concerned SSS. Of the five ports, Le Havre, at 77%, had the lowest share of SSS as a percentage of the total volume handled in its port.

Table 6: Dry bulk: Top 5 SSS ports – 1000 tonnes, 2003

Dry bulk		
	Total SSS (1000 tonnes)	Share of EU-15 SSS
London	13 470	3.70%
Rotterdam	12 612	3.47%
Amsterdam	10 572	2.91%
Hamburg	9 290	2.55%
Ravenna	8 745	2.41%

London handled more dry bulk than any other port. It was closely followed by Rotterdam, Amsterdam, Hamburg and Ravenna, in that order.

Figure 7: Share of SSS in dry bulk handled – 1000 tonnes, 2003



In London, 90% of the volume of dry bulk was handled by SSS. In contrast, in Rotterdam, only 15% of the volume of dry bulk was handled by SSS.

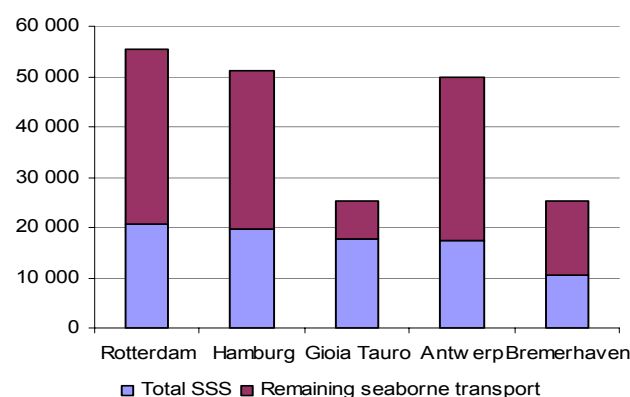
Table 7: Containers: Top 5 SSS ports – 1000 tonnes, 2003

Containers		
	Total SSS (1000 tonnes)	Share of EU-15 SSS
Rotterdam	20 526	8.97%
Hamburg	19 801	8.65%
Gioia Tauro	17 702	7.73%
Antwerp	17 329	7.57%
Bremerhaven	10 447	4.56%

When looking at volume of containers handled by SSS, the port which dealt with the largest volume was Rotterdam. It accounted for almost 9% of the volume of containers handled by SSS by all EU-15 ports.

It was closely followed by Hamburg (8.6%), Gioia Tauro (7.7%) and Antwerp (7.6%).

Figure 8: Share of SSS in containers handled – 1000 tonnes, 2003



In Gioia Tauro, 71% of the total volume of containers was handled by SSS. In contrast, the comparable figure for other ports never rises above 41%.

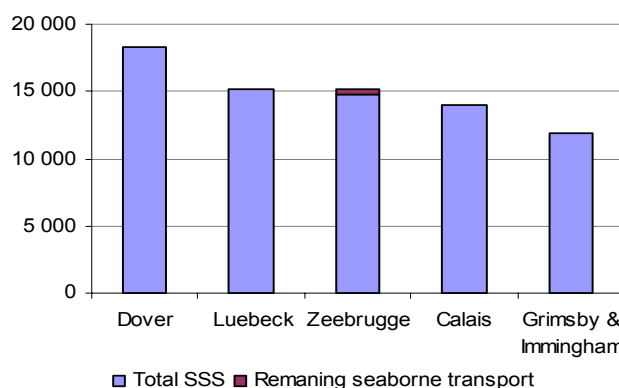
Table 8: Roll-on/roll-off units: Top 5 SSS ports – 1000 tonnes, 2003

Roll-on/roll-off units		
	Total SSS (1000 tonnes)	Share of EU-15 SSS
Dover	18 241	5.40%
Luebeck	15 193	4.49%
Zeebrugge	14 762	4.37%
Calais	14 034	4.15%
Grimsby & Immingham	11 851	3.51%

Dover handled the largest volume of ro-ro units by SSS, at over 18 million tonnes.

It was followed by Lubeck, Zeebrugge and Calais. The five top-ranked ports are highly specialised and almost

Figure 9: Share of SSS in ro-ro units handled – 1000 tonnes, 2003



exclusively transport ro-ro units by SSS. Only 3% of the ro-ro cargo handled in Zeebrugge was not shipped in this way. Clearly, their geographic location plays a considerable role in this.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The content of this "Statistics in Focus" is based on data collected within the framework of the EU maritime Directive ("Council Directive 95/64(EC) of 8.12.1995 on the statistical returns in respect of carriage of goods and passengers by sea" - OJ L320 of 30.12.1995, page 25).

Short Sea Shipping (SSS), as covered in this issue of "Statistics in Focus", deals with the transport of goods between ports in the EU-15 and Norway, on the one hand, and ports situated in geographical Europe, on the Mediterranean and Black Seas on the other, i.e. ports in EU countries (Belgium, Denmark, Germany, Estonia, Greece, Spain, France, Ireland, Italy, Cyprus, Latvia, Lithuania, Malta, the Netherlands, Poland, Portugal, Slovenia, Finland, Sweden and the United Kingdom), EEA countries (Iceland and Norway), Baltic Sea countries (Russia), and Mediterranean countries (Albania, Algeria, Bosnia-Herzegovina, Croatia, Egypt, Israel, Lebanon, Libya, Montenegro, Morocco, Syria, Tunisia and Turkey) and Black Sea countries (Bulgaria, Georgia, Moldova, Romania, Russia, Turkey and Ukraine).

The 2003 data provided for Greece are estimates (data in italics). As the data for the last two quarters of 2003 were not available at the time that this publication was being prepared, the totals published for 2003 are estimates arrived at by substituting the data for the last two quarters of 2002 for those of the last two quarters of 2003.

EU-15 figures refer to a total of 13 Member States, as Luxembourg and Austria have no sea ports. The total includes the estimated data for Greece.

The totals per country and for the EU-15 included in this issue of "Statistics in Focus" exclude the double counting of national and international flows which take place within the EU-15. Where both the port of origin and the port of destination provided data, only the incoming goods declared by each were added together to determine the total volume transported on the maritime route in question. The aggregates per country and for the EU-15 are the sum of these data. These totals may therefore differ from the sum of inward and outward flows.

For reasons of clarity, certain types of cargo were grouped together. This is, in particular, the case for "roll-on/roll-off units", which includes both "self-propelled roll-on/roll-off units" and "non-self-propelled roll-on/roll-off units".

The following sea regions have been taken into account: Baltic Sea, North Sea, Atlantic Ocean (including the English Channel and the Irish Sea), Mediterranean Sea and the Black Sea. Morocco - West Africa, Egypt - Red Sea, and Israel - Red Sea are also not covered in this report.

Baltic Sea:

Danish ports on and south of the Helsingborg - Korsør - Nyborg - Kolding line (excluding Helsingborg).

Ports of Germany, Poland, Russia, Lithuania, Latvia, Estonia and Finland (including Gulf of Finland, Gulf of Bothnia and the Åland Islands).

The Swedish ports from Helsingborg up to and including the ports in the Gulf of Bothnia.

North Sea:

The Norwegian and Swedish ports from Bergen down to and including Helsingborg.

The Danish ports above the Helsingborg - Korsør - Nyborg - Kolding line; North Denmark and Belgium.

Ports on the east coast of the United Kingdom (Scotland and United Kingdom) from cape Wrath in Scotland up to and including Ramsgate, including the Shetland Islands and Orkney Islands.

The ports of Germany and the Netherlands.

Atlantic Ocean:

Ports towards the north of the English Channel: Ports on the West Coast of the United Kingdom from Cape Wrath in Scotland as far as Lands End in England, the Irish ports and the islands.

Channel ports: French ports from the Belgian border up to and including Pointe St. Mathieu (including the Isle of Ouessant); the English ports from Ramsgate as far as Lands End (among which the Scilly Islands, the Channel Islands and the Isle of Wight).

Ports towards the south of the Channel: the French ports to the south of Pointe St. Mathieu; the northern ports of Spain; (all) the ports of Portugal and the southern ports of Spain, up to and including Tarifa.

Mediterranean Sea:

European ports: the ports of South European countries bordering the Mediterranean Sea (including the Islands belonging to it), Malta and Cyprus; the ports of the European part of Turkey from the border with Greece up to and including the western ports on the Bosphorus (Rumelikavagi).

Asian ports: the remaining Turkish ports on the Mediterranean Sea (including the ports on the Bosphorus); the ports of Syria, Lebanon, Israel and the ports of Egypt to the east of the Suez Canal.

African ports: the ports of Ceuta and Melilla and those ports east of it up to and including the ports on the Suez Canal (include Suez).

Black Sea:

The Black Sea ports on the Bosphorus.

Other:

Unknown ports or inland (river) ports.

Eurostat is the source of all the figures included in this issue of "Statistics in Focus". The figures reflect the data available in Eurostat's reference database as of November 2004.

This publication was produced with the assistance of Sandrine Herbeth, Manuel Da Silva and Marion Biré.

Further information:

➤ **Databases**

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