

# Post and telecommunications in the European Union

## Statistics in focus

### INDUSTRY, TRADE AND SERVICES

5/2005

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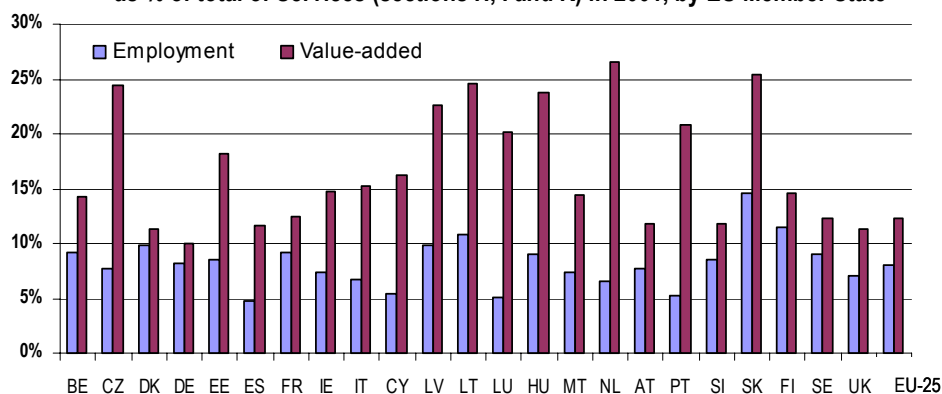
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The sector of post and telecommunications covered in this publication corresponds to division 64 of the NACE Rev. 1. This division is composed of two groups: Post and courier activities (NACE group 64.1) and Telecommunications (NACE group 64.2).

In recent years, this service sector has been undergoing substantial changes, essentially due to technological developments (i.a. internet, e-mail, mobile telephony, broadband), deregulation of formerly public or state-controlled enterprises (like the splitting of activities of mail forwarding and telephone network operation) and privatisation. Post and telecommunications continue to be a very dynamic sector, especially with regards to the highly competitive telecommunications sub sector, notably influenced by the increasing number of mobile telephone subscriptions and operators of cellular mobile telecommunications.

Three million persons were employed in post and telecommunications at EU level in 2001 and a total value-added of EUR 197 billion was generated. With regards to employment, post and telecommunications accounted for 8 % of total employment in the non-financial service sector (NACE sections H, I and K). The share in the value-added of the services sector amounted to 13 %.

Graph 1: Employment and value-added in Post and Telecommunications, as % of total of Services (sections H, I and K) in 2001, by EU Member State



Employment measured in number of persons employed (see *methodological notes*). SI: employment is based on the number of employees. NL: Services: 2001 data for sections H, I; 2000 data for section K. CY: Services are sections H, I and K, excluding 70. EL, PL: no data available. EU-25: based on available data.

Source: Eurostat (SBS)

At EU-level, the United Kingdom contributed most to value-added generated in this sector (22 %). Within national economies, post and telecommunications was the most important part of the Services sector in Slovakia, whereas it was of the least importance for Germany.

The post and courier activities sub sector generates substantially less value-added than telecommunications, but it has the larger share of employment.

When looking at enterprises, the sector remains dominated by a few very large enterprises: 0.3 % of all enterprises have 1000 persons employed or more; these are responsible for 77 % of the total turnover generated in this sector.

Female employment is high in the post and telecommunications sector (EU average: 38 %). In 6 Member States women make up the majority of the workforce.



**Table 1: Importance of Post and Telecommunications in the EU and in the Member States, 2001**

	Employment at EU-25 level (in 1000)	Employment at EU-25 level (share in %)	Value-added at EU-25 level (in billion EUR)	Value-added at EU-25 level (share in %)	Main contributor to value-added	Member State where the sector is	
						Most important*	Least important*
Post and courier activities (64.1)	1 788	59.5%	56.3	28.6%	United Kingdom	Luxembourg	Cyprus
Telecommunications (64.2)	1 217	40.5%	140.5	71.4%	United Kingdom	Lithuania	Germany
Post and telecommunications (64)	3 005	100%	196.9	100%	United Kingdom	Slovakia	Germany
Post and telecommunications (section I)	10 591		515				
Share of Post and telecommunications in section I	28.4%		38.2%				
Services (NACE Rev.1 section H, I and K)	38 320		1 509				
Share of Post and telecommunications in Services	7.8%		13.0%				

\* See methodological notes (degree of specialisation).

Source: Eurostat (SBS)

### Post and courier activities: high share in employment, low share in value-added

Within the post and telecommunications sector, telecommunications is responsible for 71 % of the value-added. With regards to employment however, its share is only 41 %.

In absolute terms, the United Kingdom contributed most to the EU's value-added in 2001, with a share of 22 % of the total, ahead of Germany (17 %) and France (15 %).

When relating post and telecommunications to the entire services' sector of the individual countries, it appears that post and courier activities have the highest relative importance in Luxembourg whereas it is of least importance in Cyprus. Telecommunications are particularly important in Lithuania and least important in Germany (see table 1).

At EU level in 2001, a total turnover of EUR 413 billion was generated in post and telecommunications. Nearly 80 % of this turnover was registered in telecommunications. A similar relation applied to value-added, where 71 % of the EUR 197 billion came from telecommunications.

In most Member States, the majority of the persons employed in this sector work in post and courier activities, with the notable exception of Cyprus and Slovenia where a clear dominance of telecommunications was recorded (72 %). In Latvia, Lithuania and Portugal, employment in the two sub-sectors was balanced.

**Table 2 : Main indicators in Post and Telecommunications, 2001**

Turnover - in million EUR	BE	CZ	DK	DE	EE	ES	FR	IE	IT	CY	LV	LT	LU
Post and telecommunications (64)	12 508	3 787	7 529	67 759	468	28 576	64 964	5 942	50 714	427	609	595	1 456
Share in total EU-25 post and telecom. (%)	3.0	0.9	1.8	16.4	0.1	6.9	15.7	1.4	12.3	0.1	0.1	0.1	0.4
Post and courier activities (64.1)	2 856	:	:	18 636	:	3 622	15 346	:	8 100	34	47	28	469
Share in total post and telecom. (%)	23	:	:	28	:	13	24	:	16	8	8	5	32
Telecommunications (64.2)	9 652	:	:	49 123	:	24 954	49 618	:	42 614	393	563	566	987
Share in total post and telecom. (%)	77	:	:	72	:	87	76	:	84	92	92	95	68

#### Value-added at factor cost - in million EUR

Post and telecommunications (64)	5 831	1 955	3 648	33 274	221	13 862	29 597	2 287	24 427	369	385	296	898
Share in total EU-25 post and telecom. (%)	3.0	1.0	1.9	16.9	0.1	7.0	15.0	1.2	12.4	0.2	0.2	0.2	0.5
Post and courier activities (64.1)	1 729	:	:	11 744	:	1 957	11 237	:	5 580	28	32	31	250
Share in total post and telecom. (%)	30	:	:	35	:	14	38	:	23	8	8	10	28
Telecommunications (64.2)	4 102	:	:	21 530	:	11 905	18 360	:	18 847	341	353	265	648
Share in total post and telecom. (%)	70	:	:	65	:	86	62	:	77	92	92	90	72

#### Number of persons employed

Post and telecommunications (64)	83 050	70 259	58 931	535 687	8 467	189 128	474 571	25 574	285 387	3 678	14 263	17 586	3 927
Share in total EU-25 post and telecom. (%)	2.8	2.3	2.0	17.8	0.3	6.3	15.8	0.9	9.5	0.1	0.5	0.6	0.1
Post and courier activities (64.1)	48 747	:	:	346 186	:	110 654	301 963	:	173 596	1 043	7 472	8 960	3 078
Share in total post and telecom. (%)	59	:	:	65	:	59	64	:	61	28	52	51	78
Telecommunications (64.2)	34 303	:	:	189 501	:	78 474	172 608	:	111 791	2 635	6 791	8 626	849
Share in total post and telecom. (%)	41	:	:	35	:	41	36	:	39	72	48	49	22

#### Apparent labour productivity (value-added per person employed) - in thousand EUR

Post and telecommunications (64)	70.2	27.8	61.9	62.1	26.1	73.3	62.4	89.4	85.6	100.4	27.0	16.8	228.6
Post and courier activities (64.1)	35.5	:	:	33.9	:	17.7	37.2	:	32.1	27.2	4.3	3.4	81.2
Telecommunications (64.2)	119.6	:	:	113.6	:	151.7	106.4	:	168.6	129.3	51.9	30.7	762.9

EL, PL: no data available.

Source: Eurostat (SBS)

**Table 3: Number of enterprises and average number of persons employed per enterprise in Post and Telecommunications, by Member State, 2001**

	Number of enterprises			Average number of persons employed per enterprise		
	Total post and telecommunications (64)	Post and courier activities (64.1)	Telecommunications (64.2)	Total post and telecommunications (64)	Post and courier activities (64.1)	Telecommunications (64.2)
BE	2 029	1 690	339	41	29	101
CZ	580	231	349	121	:	:
DK	1 193	962	231	49	:	:
DE	5 772	5 202	570	93	67	332
EE	119	12	107	71	:	:
ES	7 715	6 528	1 187	25	17	66
FR	3 202	1 444	1 758	148	209	98
IE	707	:	:	36	:	:
IT	2 783	1 877	906	103	92	123
CY*	192	143	49	18	7	51
LV	146	19	127	98	393	53
LT	184	54	130	96	166	66
LU	113	45	68	35	68	12
HU	1 698	1 029	669	40	45	33
MT	74	:	:	43	:	:
NL	3 370	2 240	1 130	43	38	:
AT	514	306	210	112	112	111
PT	261	52	209	148	365	94
SI	379	279	100	30	24	46
SK	52	7	45	638	2745	310
FI	563	271	292	80	90	72
SE	792	322	470	115	181	69
UK	16 187	8 640	7 547	34	35	32
<b>EU-25</b>	<b>50 622</b>	<b>32 910</b>	<b>17 714</b>	<b>59</b>	<b>54</b>	<b>68</b>

EL, PL: no data available — \* 2000 data.

Source: Eurostat (SBS)

When looking at the apparent labour productivity (value-added per person employed) in 2001, Luxembourg excels with a value close to EUR 229 000. In this country, the telecommunications' sector is highly developed (television broadcasting, satellite operation). Luxembourg is followed by Cyprus (EUR 100 400) and Ireland (EUR 89 400). The EU average amounted to EUR 65 500.

Over 50 000 enterprises in post and telecommunications were registered at EU level in 2001. Of those about 33 000 belonged to post and courier activities. Even considering the size of the country, the number of enterprises in the United Kingdom is high (16 187, or 32 % of all EU-enterprises). Likewise, the number of enterprises in the Netherlands for instance is also high and corresponds roughly to the number of enterprises registered in France. However, it appears that the number of persons employed per enterprise is far higher in those countries with relatively few enterprises. It should be recalled that statistics here refer to enterprises. An enterprise – classified here based on its main activity - can carry out one or more activities at one or more locations. This should be borne in mind when reading Table 3 (see also methodological notes).

In Slovakia, a country with relatively few enterprises in this sector, the average number of persons employed per enterprise amounted to 638, more than ten times the EU average. Portugal and France registered an average of 148 persons per enterprise. The lowest average number of persons employed per enterprise can be found in Cyprus (2000 data), Spain and Slovenia, with an average of 18, 25 and 30 persons employed respectively.

**Table 2 : Main indicators in Post and Telecommunications, 2001 (continued)**

- in million EUR	HU	MT	NL	AT	PT	SI*	SK	FI	SE	UK	EU-25	NO	BG	RO
<b>ost and telecommunications (64)</b>	<b>3 848</b>	<b>220</b>	<b>21 837</b>	<b>9 109</b>	<b>7 386</b>	<b>960</b>	<b>1 151</b>	<b>6 892</b>	<b>11 930</b>	<b>94 307</b>	<b>412 551</b>	<b>7 911</b>	<b>1 327</b>	<b>2 322</b>
Share in total EU-25 post and telecom. (%)	0.9	0.1	5.3	2.2	1.8	0.2	0.3	1.7	2.9	22.9	100			
and courier activities (64.1)	483	:	:	2 048	668	164	190	1 174	2 709	20 975	87 026	1 717	82	152
share in total post and telecom. (%)	13	:	:	22	9	17	17	17	23	22	21	22	6	7
lecommunications (64.2)	3 365	:	:	7 061	6 718	795	961	5 719	9 221	73 333	325 524	6 194	1 246	2 171
share in total post and telecom. (%)	87	:	:	78	91	83	83	83	77	78	79	78	94	93
<b>factor cost - in million EUR</b>														
<b>ost and telecommunications (64)</b>	<b>1 804</b>	<b>161</b>	<b>9 181</b>	<b>3 952</b>	<b>3 260</b>	<b>257</b>	<b>560</b>	<b>2 729</b>	<b>5 842</b>	<b>43 791</b>	<b>196 868</b>	<b>3 180</b>	<b>725</b>	<b>1 327</b>
Share in total EU-25 post and telecom. (%)	0.9	0.1	4.7	2.0	1.7	0.1	0.3	1.4	3.0	22.2	100			
and courier activities (64.1)	316	:	:	1 224	515	100	108	679	2 110	12 656	56 318	1 068	41	97
share in total post and telecom. (%)	18	:	:	31	16	39	19	25	36	29	29	34	6	7
lecommunications (64.2)	1 488	:	:	2 729	2 746	157	452	2 050	3 733	31 135	140 550	2 112	684	1 230
share in total post and telecom. (%)	82	:	:	69	84	61	81	75	64	71	71	66	94	93
<b>s employed</b>														
<b>ost and telecommunications (64)</b>	<b>68 446</b>	<b>3 210</b>	<b>147 119</b>	<b>57 629</b>	<b>38 620</b>	<b>3 641</b>	<b>33 162</b>	<b>45 211</b>	<b>90 784</b>	<b>557 085</b>	<b>3 005 100</b>	<b>43 030</b>	<b>45 713</b>	<b>99 021</b>
Share in total EU-25 post and telecom. (%)	2.3	0.1	4.9	1.9	1.3	0.1	1.1	1.5	3.0	18.5	100			
and courier activities (64.1)	46 213	:	84 799	34 327	18 988	1 016	19 216	24 260	58 419	298 895	1 788 300	28 793	15 557	36 038
share in total post and telecom. (%)	68	:	58	60	49	28	58	54	64	54	60	67	34	36
lecommunications (64.2)	22 233	:	62 320	23 302	19 632	2 625	13 946	20 951	32 365	258 190	1 216 800	14 237	30 156	62 983
share in total post and telecom. (%)	32	:	42	40	51	72	42	46	36	46	40	33	66	64
<b>t labour productivity (value-added per person employed) - in thousand EUR</b>														
<b>ost and telecommunications (64)</b>	<b>26.4</b>	<b>50.2</b>	<b>62.4</b>	<b>68.6</b>	<b>84.4</b>	<b>70.7</b>	<b>16.9</b>	<b>60.4</b>	<b>64.4</b>	<b>78.6</b>	<b>65.5</b>	<b>73.9</b>	<b>15.9</b>	<b>13.4</b>
and courier activities (64.1)	6.8	:	:	35.7	27.1	98.4	5.6	28.0	36.1	42.3	31.5	37.1	2.7	2.7
lecommunications (64.2)	66.9	:	:	117.1	139.9	60.0	32.4	97.8	115.3	120.6	115.5	148.3	22.7	19.5

\* Employment is based on the number of employees.

Source: Eurostat (SBS)

At the level of the EU, the average size of telecommunications' enterprises is higher than those of post and courier activities; nevertheless, various Member States show highly individual results ranging

from an average of 2 745 persons employed (Slovakia) to 7 (Cyprus) in post and courier activities and from 332 (Germany) to 12 (Luxembourg) in telecommunications (table 3).

### Few very large enterprises still dominate

Despite privatisation and deregulation and the subsequent "creation" of numerous new enterprises (for the definition of enterprise, please refer to the Methodological Notes), the sector remains dominated by a few very large enterprises (those with 1000 persons employed or more). Indeed, less than 0.3 % of all enterprises are responsible for 77 % of the total turnover generated in this sector. Moreover, these enterprises employ 80 % of the total workforce (see graph 2).

On the other hand, 88 % of all enterprises in post and telecommunications are very small (with 1 to 9 persons employed) and take a share of only around 3 % in total turnover and employment.

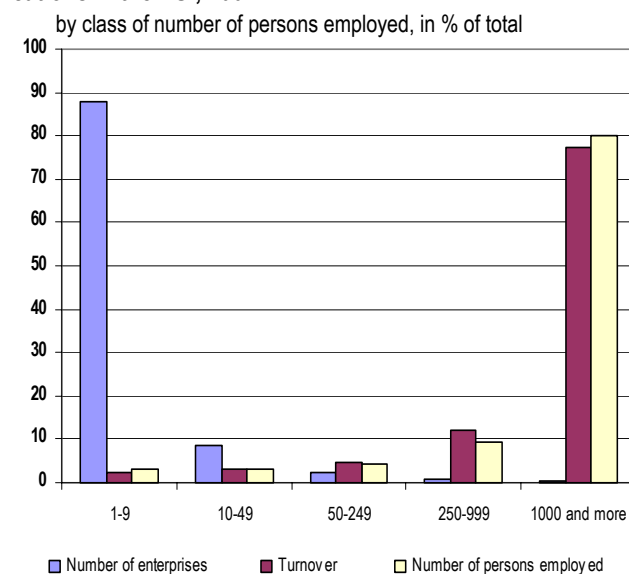
Female employment is high in the post and telecommunications sector: The share at EU level was 38 %. According to the EU Labour Force Survey (LFS), in 6 out of 24 Member States (Polish data not available) women constitute the majority in the workforce. The highest share of female employment was registered in Estonia (79 %) followed by the Czech Republic (61 %). The lowest shares were registered in Malta and Cyprus, with 20 % and 21 % respectively.

Regionally, it appears that this sector is important in Latvia, Lithuania, Denmark, Sweden, the available Finnish regions and the southern parts of Belgium and Italy. In Hungary, 5 out of 7 NUTS 2 regions recorded a high employment share (see map on

page 5).

The regions of the United Kingdom recorded relatively low shares, especially in the North, where for North Eastern Scotland and Highlands and Islands, the lowest shares were recorded.

**Graph 2: Share of the number of enterprises, turnover and number of persons employed in Post and Telecommunications in the EU, 2001**



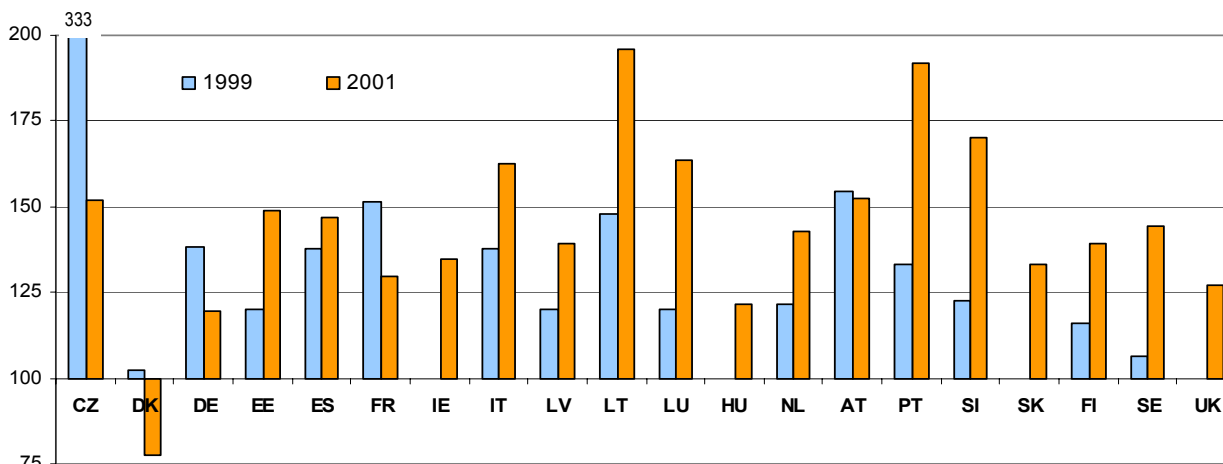
Source: Eurostat (SBS)

### Strong evolution of Post and Telecommunication since 1997

A profound structural change can be observed in this sector (see graph 3). In 1999, compared to 1997, all Member States registered a significant increase in the number of enterprises, except for Denmark and






Sweden, where this increase was only marginal. In the Czech Republic, an exceptionally large growth in the number of enterprises was registered.

**Graph 3: Evolution of the number of enterprises in Post and Telecommunications in selected Member States (1997=100)**



HU and UK : number of enterprises 1999 = 100 ; HU enterprises with 5 persons employed or more; DE: change in methodology in 2000. — Source: Eurostat (SBS)

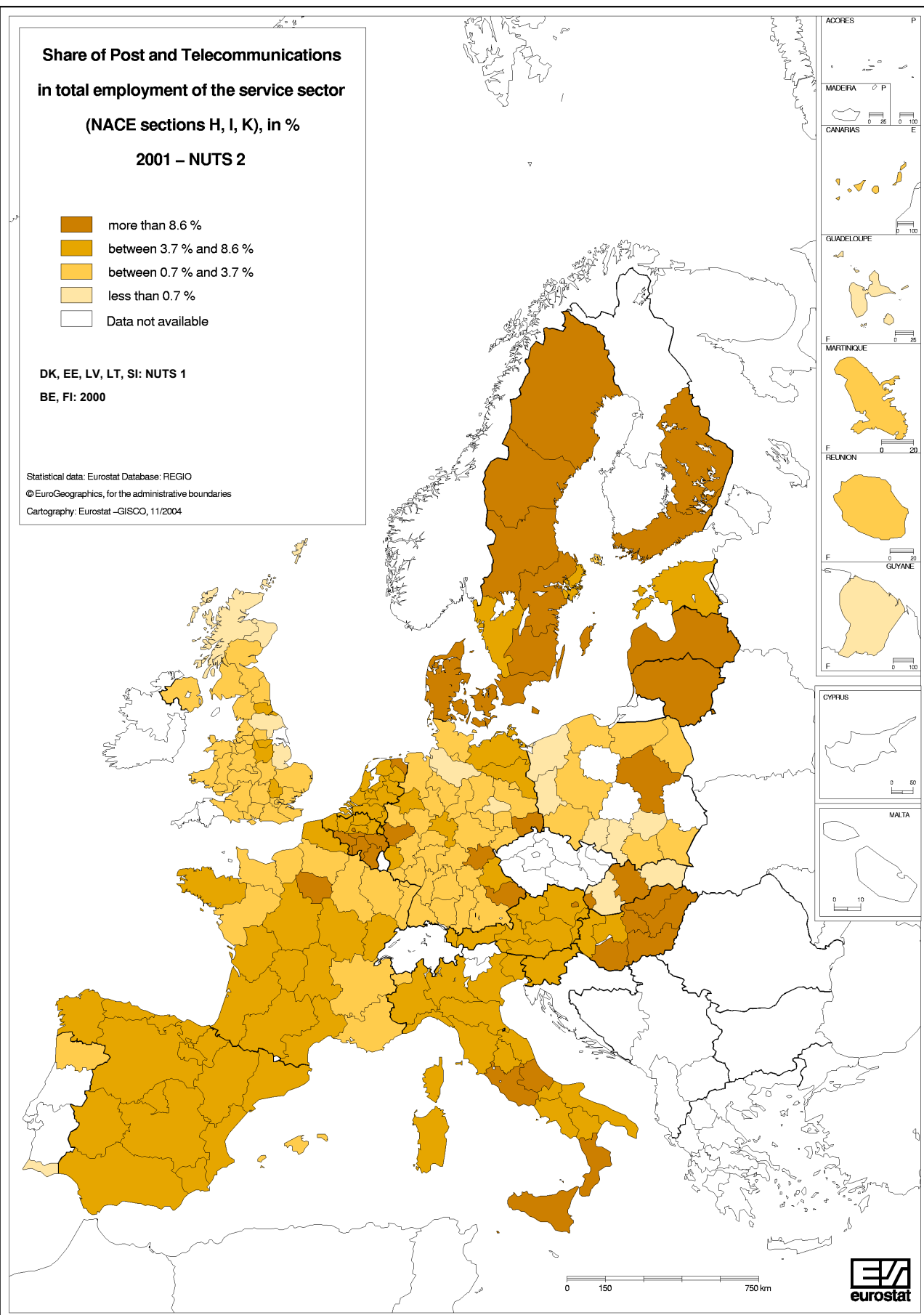
**Share of Post and Telecommunications  
in total employment of the service sector  
(NACE sections H, I, K), in %  
2001 – NUTS 2**

-  more than 8.6 %
-  between 3.7 % and 8.6 %
-  between 0.7 % and 3.7 %
-  less than 0.7 %
-  Data not available

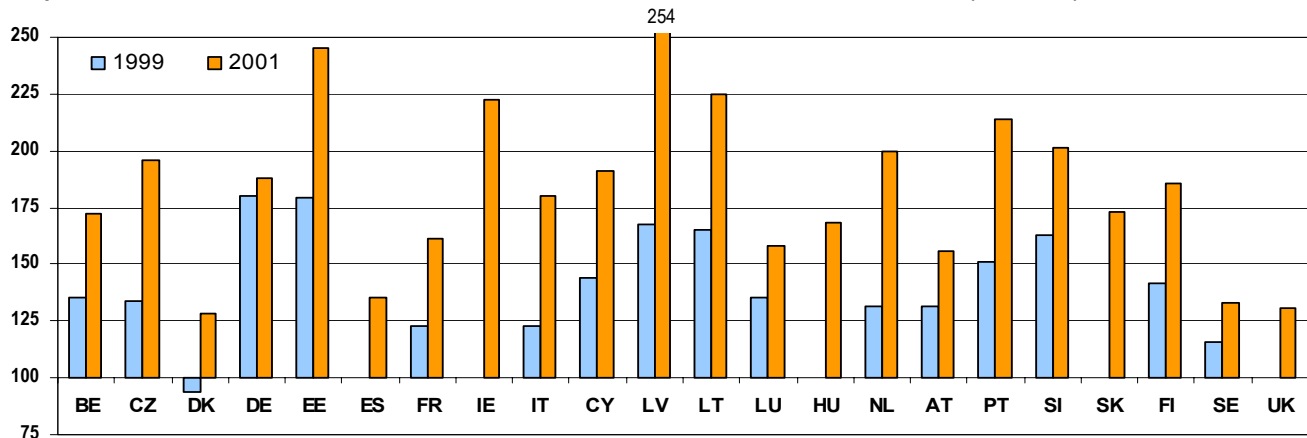
DK, EE, LV, LT, SI: NUTS 1

BE, FI: 2000

Statistical data: Eurostat Database: REGIO  
© EuroGeographics, for the administrative boundaries  
Cartography: Eurostat -GISCO, 11/2004



**Graph 4: Evolution of turnover in Post and Telecommunications for selected Member States (1997=100)**



ES, HU and UK : turnover 1999 = 100 ; HU: enterprises with 5 persons employed or more; DE: change in methodology in 2000.

Source: Eurostat (SBS)

Two years later, in 2001, a consolidation seemed to have taken place, as the number of enterprises fell in Germany, France and Austria, as compared to 1999. It should be noted here that the comparability over time for Germany might be affected by a change in the methodology from 2000 onwards. In the Czech Republic the number decreased nearly as fast as it increased a couple of years before, but still stood 50 % higher than in 1997. In Denmark, the number of enterprises was significantly less than in 1997. In Member States like Lithuania, Portugal and Slovenia, their number continued to rise sharply.

Since 1997, turnover has risen considerably: all Member States for which data are available recorded an increase for 1999, ranging from 16 % in Sweden to 80 % in Germany (see graph 4). Turnover only decreased in Denmark, losing 6 % compared to 1997.

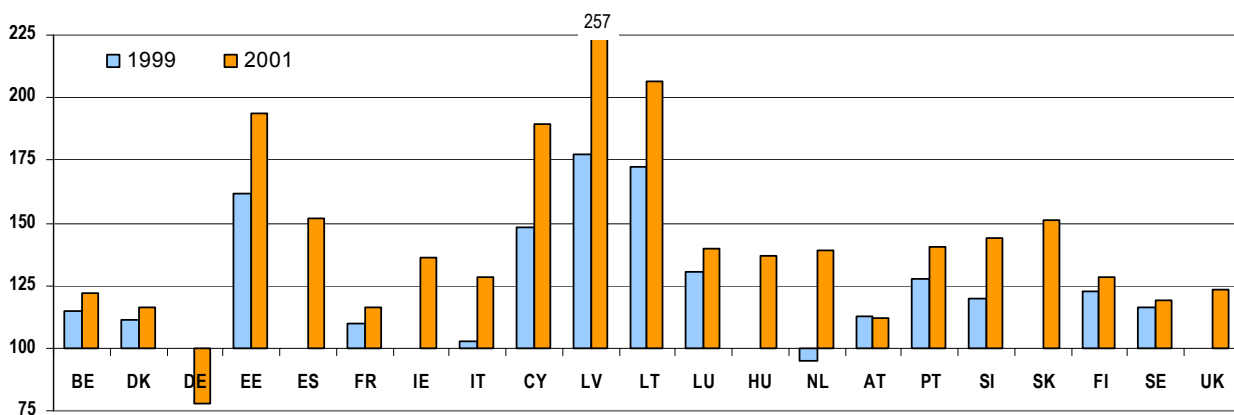
The following two years (1999-2001), turnover

continued to rise. The increase even accelerated in a number of Member States, such as the Czech Republic, France, Italy and the Netherlands. It should be noted that the turnover figures are in current prices.

Value-added generated in the post and telecommunications' sector did not develop in the same way as turnover. As shown in Graph 5, most Member States for which data are available recorded growth, except for the Netherlands, where between 1997 and 1999 the value-added decreased and Germany, where in 2001 the value-added generated in the sector fell considerably compared to 1999. As for the development over time of turnover, it should be noted that the figures are in current prices.

The largest growth in value-added are registered in some of the new Member States: especially Estonia, Cyprus, Latvia and Lithuania.

**Graph 5: Evolution of value-added in Post and Telecommunications for selected Member States (1997=100) .**



DE, ES, HU and UK : value-added 1999 = 100 ; HU: enterprises with 5 persons employed or more; DE: change in methodology in 2000.

Source: Eurostat (SBS)

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

**EU:** European Union, including the 25 Member States (EU-25): Belgium (BE), the Czech Republic (CZ), Denmark (DK), Germany (DE), Estonia (EE), Greece (EL), Spain (ES), France (FR), Ireland (IE), Italy (IT), Cyprus (CY), Latvia (LV), Lithuania (LT), Luxembourg (LU), Hungary (HU), Malta (MT), the Netherlands (NL), Austria (AT), Poland (PL), Portugal (PT), Slovenia (SI), Slovakia (SK), Finland (FI), Sweden (SE) and the United Kingdom (UK).

### SYMBOLS

“.” non available or confidential.

### DEFINITIONS

#### **Division by sector of activity**

Employment and other indicators in the Structural Business Statistics (SBS) are divided into sectors of activity according to the NACE Rev. 1 system of classification. This classifies activity by section (1-letter codes), subsection (2-letter codes), division (2-digit codes), groups (3-digit codes) and classes (4-digit codes). All activities of Post and Telecommunications are included under section I. The Post and Telecommunication sector analysed in this publication includes the following divisions and groups:

64: Post and telecommunications

64.1: Post and courier activities

64.2: Telecommunications

The non-financial service sector also mentioned includes the sectors H (Hotels and Restaurants), I (Transport, storage and communication) and K (Real estate, renting and business activities).

**Number of persons employed:** defined as the total number of persons who work in the observation unit (inclusive of working proprietors and partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams). It includes part-time workers, seasonal workers, apprentices and home workers who are on the pay roll. The observation unit for aggregating data is the enterprise.

**Number of employees:** defined as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind. A worker from a temporary employment agency is considered to be an employee of the temporary employment agency and not of the unit (customer) in which they work.

**Enterprise:** the enterprise is the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision making, especially for the allocation of its current resources. An enterprise carries out one or more

activities at one or more locations. An enterprise may be a sole legal unit. Enterprises in this article are classified by their main activity.

The enterprise should not be confused with the local unit, which is an enterprise or part thereof (e.g. a workshop, factory, warehouse, office, mine or depot) situated in a geographically identified place.

Although the population of active enterprises is mainly affected by real enterprise births and deaths, other events account for the change of the population as well, such as split-offs, break-ups, mergers, take-overs, reactivations of dormant units, changes of activity or legal form, and restructuring of enterprise groups. This means that changes of the enterprise population do not necessarily indicate economic dynamism, but may partly be due to formal rather than genuine entry and exit of units.

**Turnover:** Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties.

**Value-added:** Value-added measured at factor cost, which is the gross income from operating activities after adjusting for operating subsidies and indirect taxes (including value-added tax).

**Degree of specialisation:** The most specialised Member State is the country for which the share of the value-added accounted for by the Post and telecommunications or a branch thereof is highest in relation to the total services (NACE H, I and K) of that country. The least specialised Member State is the country where this share is the lowest.

### DATA SOURCES

**Structural Business Statistics (SBS):** collected within the framework of Council regulation on structural business statistics (EC, EURATOM) No. 58/97 of December 1996. The SBS Regulation governs the transmission of data to Eurostat from the reference year 1995 onwards and covers all market activities in sections C to K of NACE Rev. 1. For further information, visit:

[http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main\\_en.html](http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html)

**EU Labour Force Survey (LFS):** a survey of private households which provides data on the population living in these by nationality and by work status as well as by sex and age. The main focus is on employment, unemployment and inactivity and the various aspects of these, including the sector of activity in which people are employed and the highest level of educational attainment reached.

The source of all figures presented in this publication is Eurostat and reflects the **state of data availability** in Eurostat's reference database NewCronos as of October 2004.

## ***Further information:***

### ➤ **Databases**

[EUROSTAT website/Industry, trade and services/Industry, trade and services - horizontal view/Structural Business Statistics \(Industry, Construction, Trade and Services\),Annual enterprise statistics](#)

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### **European Statistical Data Support:**

Eurostat set up with the members of the 'European statistical system' a network of support centres, which will exist in nearly all Member States as well as in some EFTA countries.

Their mission is to provide help and guidance to Internet users of European statistical data.

The complete details concerning this support network can be found on our Internet site: [www.europa.eu.int/comm/eurostat/](http://www.europa.eu.int/comm/eurostat/)

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This publication has been done in collaboration with Mohamed Bzioui and Jelle Bosch.

ORIGINAL TEXT: English