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THE ENERGY SITUATION IN THE COMMUNITY

Situation 1981

Outlook 1982

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(All estimates for 1981 are preliminary and provisional)

ENERGY SITUATION AND OUTLOOK

With the European Community in the throes of an economic recession - in 1981 GDP declined by about one-half per cent, industrial production fell by around 3%, and unemployment rose to approximately 8.3% on average, representing about 9.5 million people out of jobs - energy consumption is estimated to have fallen by 4.6%. The largest fall was in respect of oil consumption, down by about 9%, with natural gas consumption falling by around 5%. Coal consumption declined by over 2%. In marked contrast, there was a substantial increase in nuclear energy supply which rose by over 32%. The Community's external dependence for its energy supplies was reduced further to about 50%.

The energy outlook for 1982 is dependent, of course, upon the recession and the degree to which there is an economic recovery in the Community and the world in general. The Community's GDP is currently being estimated to increase by up to 2% in the year ahead. On the assumption of such a modest improvement in the level of economic activity, energy consumption is estimated to rise by 1.2%. In terms of the various fuels, little change is expected in general. However, the supply of nuclear energy is estimated to increase by about 18%.

OIL

(i) Summary

1981 was a year of falling demand, reduced plant utilization and low product prices in relation to crude oil costs. The high product stocks brought forward from 1980 were substantially reduced and product imports fell. Indigenous crude oil production increased and imported crude was in abundant supply. Spot prices fell, bringing down refiners' average raw material costs, but official prices for many crudes, especially high quality low sulphur types, were too high to be recovered in the market. In these market conditions, compounded in the first half year by the appreciation of the dollar and delays in adjustments to controlled prices in some countries, Community refiners' margins came under pressure and major capacity reductions were announced.

Following the OPEC agreement in October 1981 to reunify prices around a value of \$34/bbl for Arabian Light, a more orderly and rational crude oil market should emerge in 1982, and differences in individual companies' crude oil import costs should be greatly reduced and operating margins rise. Consumption is expected to bottom out and refinery utilization to rise slightly: net imports will be little changed.

(ii) Consumption

After falling by 8% in 1980, Community consumption continued to decline by almost 9% in 1981. In the first half year the fall was about 11% but the rate of decline slowed thereafter in most Member States, reflecting the diminishing scope in the short term for substitution by other fuels. The relative importance of the many factors contributing to the fall in oil consumption is unclear, but current influences, such as the recession and weather, and structural changes brought about by high prices, are generally thought to have played roughly equal parts.

Consumption trends varied greatly as between individual products and countries. The product to show the largest overall decline was again residual fuel oil, 18% down in January/September. Variations around this average figure were considerable, from 20-25% in France, Germany and the United Kingdom, where substitution was a major factor and oil use in power stations fell by about 30%, to about 15% in the Netherlands and to single figures for Italy, where in both countries oil is displacing natural gas. A similar pattern was apparent in the case of domestic heating gasoil whose consumption was little changed in Italy and the Netherlands but was 10-20% lower elsewhere.

Motor gasoline consumption declined least of the main products to a level about 2% below 1980, while automotive diesel deliveries mostly remained at about the 1980 figure, except in the UK where the relatively high prices may account for their fall. Naphtha

remained a very depressed market, with deliveries down 10-20% from 1980, as the recession continued in the petrochemical sector. The low demand for naphtha has helped Community refiners to balance their refining operations in spite of the large fall in fuel oil consumption.

Estimates of consumption in 1982 are subject to a degree of uncertainty greater even than usual. With economic activity expected to pick up in the second half year and the scope for short-term switching to other fuels largely taken up, it seems likely that oil consumption in 1982 will be slightly below 1981.

(iii) External product movements

The Community's external balance of petroleum products trade improved in 1981, the 1980 net import figure of 18 million tons falling to about half. This improvement appears to have been due mainly to the industry's desire to reduce its large product stocks in a period of falling prices and its ability by this means to balance its refinery operations with less recourse to imports. War damage to refineries in Iran and Iraq has also been a factor in reducing the supply to the international products trade. It is unlikely that the favourable trend in the Community's external trade will be continued throughout 1982.

(iv) Refinery production

Despite a reduction in net product imports, there was an estimated fall in the quantity of crude oil processed in Community refineries between 1980 and 1981 of about 12%,

compared with that in consumption of 8%. The difference is explained by the contrary stock movements in the two years, the estimated draw down of 12 million tons in 1981 having followed an increase of the same order in 1980. The utilization ratio of installed distillation capacity fell from about 63% in 1980 to 55% in 1981. The decline in throughput was of the same order of magnitude in most member countries except the Netherlands, where the sharper fall was due to the continuing fall in product exports to Germany, and in Ireland whose Whitegate refinery was closed in the third quarter. Crude processed in Italy fell by only about 5%, thanks to a reduction in net imports of finished products, and actually rose in Greece.

(v) Refining capacity

The continued decline in consumption and the likelihood that there will be no significant recovery led the oil refining industry to contemplate further measures to reduce excess distillation capacity, estimated by the Commission at 200 million tons per year, or 25%. Refinery closures were announced, to be effected in 1981 or 1982, totalling more than 30 million tons per year. A large number of distillation units were also shut down indefinitely, or were modified to reduce their capacity. Capacity withdrawn in these ways probably exceeds 50 million tons per year.

Meanwhile the construction of conversion plants to adapt production to the much reduced requirement for fuel oil gathered momentum.

Catalytic crackers scheduled to enter service in 1981 totalled 6 million tons per year, an increase of 14% in existing capacity, and a further 8 m t/y should be added in 1982. Vis-breaking capacity is being expanded by one-third in each of the two years.

(vi) Crude oil production

Estimated 1981 production of crude oil and natural gas liquids was 96 million tons, an increase of 6.2% over 1980. In the British sector of the North Sea three new fields, Tartan, Buchan and Beatrice, whose combined production should reach 160,000 barrels per day (8 million tons per year), and Denmark's second offshore field, Gorm (30,000 b/d or 1.5 m t/y at peak output), came on stream during the year. Production also rose in France but declined in Germany and Italy. Production from the Forties field declined slightly from the 500,000 b/d (25 m t/y) achieved in 1980 as a result of reduced demand for the relatively highly priced low sulphur crudes.

1982 production will benefit from the full year's contribution of the 1981 newcomers as well as from the commissioning of Darien, North Cormorant and Fulmar in the UK sector of the North Sea, whose aggregate peak output is estimated at 440,000 b/d (22 m t/y). Total Community production in 1982 is estimated at about 106 million tons (2.1 m b/d), 10% up on 1981.

(vii) Crude oil imports

Resulting from the fall in consumption, the rise in indigenous production and the draw-down of stocks, Community net imports of crude oil and feedstocks fell by an estimated 15.6% in 1981 to 366 million tons. This figure will probably be little changed in 1982.

There were marked changes in the relative importance to the Community of its various suppliers. In spite of the overall decline in imports, those from Saudi Arabia, priced below most other crudes for the greater part of the year, rose by over 5% to represent some 40% of the total compared with 35% in 1980. Mexico increased its shipments to Member States by over 50% and accounted for 5% of Community imports. Supplies of low sulphur high quality crudes from Norway, Libya and Algeria were broadly maintained at 1980 levels, but those from Nigeria, whose crudes were over-priced for much of the year, fell sharply. Imports from all other main suppliers were down, in the case of Iraq to less than one-quarter of the 1980 figure.

(viii) Oil prices

Average prices (expressed in US dollars) of main petroleum products in the Community fell by 6% over the period January/June 1981 before recovering to end the year at much the same level as in January, and 20% above that of December 1979. The average dollar cost of crude oil supplies, on the other hand, rose

significantly during the year, particularly in the first half, to a point some 35% above December 1979 (Table 2, Annex 2). As a result of these divergent trends, the amount available for refining/marketing of main products fell from about \$70 per tonne in January to \$40 at mid-year, recovering to about \$60 by the end of the year. These broad estimates compare with a peak in recent years of \$90 per tonne in June 1980.

Crude oil supply costs in 1982 appear unlikely to change greatly from those ruling at the end of 1981, which already reflected the October increase in the Saudi official price from \$32 to \$34 per barrel, and the offsetting reductions in the price of low sulphur North African and North Sea crudes. Although spot prices remained weak at the turn of the year, they are likely to strengthen later as world demand gradually recovers, the stock run-down comes to an end and the cut in Saudi exports makes itself felt. The OPEC freeze on official prices will, however, limit the effect of a rising spot market on average supply costs.

As stocks fall to more normal levels, product prices should remain stable and perhaps strengthen later in the year, even though demand for the year as a whole seems likely to be slightly below 1981.

NATURAL GAS

Preliminary estimates for natural gas consumption within the Community indicate a further fall during 1981 over the previous year. The reduction of about 5% brings consumption back to the

1978 level of about 161 m toe. All Member States which use natural gas, except France and Ireland, show a decline in consumption, with Germany experiencing a drop of over 9%. The Netherlands and Italy report falls of about 7%, Belgium 4% and the UK about 1%. Although a relatively small user of gas, consumption in Luxembourg shows a drop of over 20%. The use of gas in France is estimated to have grown by about 4% in 1981 over the previous year as the new import contract with Algeria builds up. Ireland too has shown a rapid increase in the consumption of gas, based on its offshore field near Cork, although relatively small in Community terms.

Community production of natural gas has also fallen about 5%. The Netherlands, which accounts for almost exactly half of total Community production, showed a fall of about 7%. This decline is shared more or less equally between internal consumption and deliveries to fellow Member States. The deliveries accounted for about 54% of Dutch production. The second Community producer, the UK, which has just under a quarter of total Community production, showed a slight fall of about 1%. The only Member States to show an increase in production were Italy and Ireland.

Imports of natural gas from third countries grew by only 3% in 1981 over the previous year. This is in marked contrast to the rapid growth up to 1980 and partly reflects the current difficulties surrounding certain import contracts. An important factor is the price of imported natural gas which will have a decisive effect on the future role of this energy in

meeting overall energy needs. Nevertheless, the part of imports in total gas consumption continued to grow, from 26% in 1980 to about 29% in 1981. Norway, the USSR and Algeria continue to be the main source of gas imports into the Community in order of importance, with Libyan exports to Italy making up the balance. Norwegian gas is supplied to all major gas consuming members of the Community except Italy, whilst gas from the USSR is supplied to Germany, Italy and France. Algerian gas was supplied to France and the UK in 1981 and deliveries to Italy via the new trans-Mediterranean pipeline were to start in November.

The consumption patterns of natural gas continue to move slowly in favour of the domestic consumer reflecting both the premium usage associated with this sector, and for some Member States, the effect of the economic recession on industry. A welcome decline in the use of gas for electricity generation within the Community has also been reported.

Forecasts for 1982 suggest that there may be a slight recovery in gas consumption of about 1%, although the trend varies between Member States. Germany, France and the UK are forecasting increases whilst the Netherlands is forecast to continue reducing gas consumption. Dutch deliveries of gas to fellow Community members are also forecast to decline in line with the policy of conserving the country's gas resources. The difference will be made up by a further small increase in imports from third countries although much will depend on price developments for these supplies.

COAL

In 1981 coal consumption in the Community is estimated to have reached 305 m t (188 m toe), a level which is likely to be maintained in 1982, and showing a small decrease as compared with 1980 (313 m t or 193 m toe). The consumption of lignite and peat reached 165 m t (33 m toe) in 1981 and is expected to remain at about the same level in 1982, as compared with 162 m t in 1980.

Electricity production levelled off in 1981, and the consumption of coal in this sector remained equally stable as a whole, despite a decline in countries where nuclear energy's share increased. In 1982 the demand for coal will depend heavily on the evolution of electricity demand. Electricity generation remains the most promising sector for increased coal consumption. In other consumption sectors, the structural decline in the domestic sector is confirmed, a decline which has been insufficiently compensated for by conversion from oil to coal in the industrial and public heating sectors. The consumption of coke has shown a slight decline, falling from 63 m t in 1980 to about 61 m t in 1981. It is likely to decline further to about 60 m t in 1982, with a small reduction in the specific consumption of coke in blast furnaces.

The supply situation for solid fuels in the Community is shown in Annex 3, Table 1.

Community coal production for 1981 at 246 m t was slightly below the 1980 figure but is expected to remain at about the same level in 1982. Imports of coal from third countries reached about 70 m t in 1981 as compared with 74 m t in 1980, and could decline further by 2 m t in 1982.

Community stocks of coal and coke increased very markedly in 1980 and 1981, reaching about 100 m t in total.

The price of coal imported from third countries into the Community continues to rise (Annex 3, Table 2). For coking coals, the average CIF value rose from \$69 per ton in 1980 to \$82 per ton in 1981 (+ 19%); expressed in terms of tons of coal equivalent (tce) these figures are \$65 and \$77 respectively; for steam coal the figures are \$58 per tce in 1980 and \$71 per tce for the first half of 1981 (+ 22%). The 1981 values include the supplementary charges arising from the delay of ships in congested ports and also reflect the rising price of bunker fuels. Imported coal continues to maintain a considerable price advantage in relation to the costs of Community production.

ELECTRICITY

(i) Electricity consumption

In 1981 net electricity consumption in the Community, reflecting the depressed state of the economy, is estimated to have remained at about the same level as in 1980 (a total of some 1,210 TWh,

0.2% less than in 1980) (Annex 4, Table 1). During the early part of the year electricity sales were markedly more depressed than later in the year, when some improvement in sales to industry was evident. In many countries sales in the tertiary sector were more buoyant than hitherto, indicating increased electricity use in the service and light industrial areas.

In all countries, with the exception of France, electricity demand declined for the greater part of the year and the growth in France was largely due to the increasing demand of the nuclear industry (Eurodif).

Expectations for 1982 are for improved economic conditions to result in increases in electricity consumption in all countries, particularly in the industrial and tertiary sectors. For the Community, electricity consumption is expected to increase by some 2.5%.

(ii) Electricity production

Electricity production (net) in the Community decreased by about 0.6% in 1981 as compared with 1980. There were significant changes in the contributions of the various energy sources to electricity production, including decreases in the contributions of petroleum products of some 14% and of natural gas of some 17% compared with 1980 (Annex 4, Table 2).

The contribution from coal to electricity production was about 1% less than in 1980, although there were increases in coal's contribution in Germany, Italy and the Netherlands.

A substantial increase of 32% in the nuclear contribution in 1981 was mainly due to growth in France (70%) and in Germany (16%). Hydraulic conditions in the Community were about the same in 1981 as in 1980.

The effect of the above changes was that, in 1981, some 16.5% of electricity production was from nuclear, 45% from solid fuels, 19% from petroleum products, 7.5% from natural gas and 12% from hydro-electric.

The share of nuclear and solid fuels in energy inputs for electricity reached 67.8% in 1981 compared with 63.4% in 1980.

For 1982 a further increase in contribution from nuclear to electricity production is expected. Provided that the electricity production requirements increase as expected, the contribution from coal should increase (returning to the previous trend) and the petroleum products and natural gas contributions should continue to decrease.

(iii) Nuclear energy

During 1981 nine nuclear reactors were linked to the grid in the Community, increasing the net operating capacity from 32.7 GWe to 41.2 GWe. Of these nine, eight were pressurised water units in France with a total capacity of 7.24 GWe located at Gravelines, Tricastin, Dampierre, St. Laurent and Blayais. A further pressurised water unit of 1.23 GWe was in Germany, at Grafenrheinfeld.

Despite the continuing increases in the capital costs of electricity production plant, the costs of electricity production continue to be more favourable from nuclear than from coal, and even more so than from oil.

Initial operation of nuclear plant in 1982 is expected:

- in Belgium, with the completion of pressurised water reactors at Doel and Tihange, a total of 1.8 GWe;
- in France, with two pressurised water reactors at Chinon and one at Blayais, a total of 2.67 GWe;
- in the UK, with advanced gas cooled reactors at Dungeness, Hartlpool and Heysham, a total of 1.85 GWe.

Production of electricity from nuclear stations in the Community should thus increase by some 18% from 197 TWh in 1981 to 233 TWh in 1982.

Nuclear energy's share of total primary energy requirements in the Community increased to 6.2% in 1981 and is expected to be 7.3% in 1982.

NUCLEAR FUELS

In view of the generally slow development of nuclear energy in most Member States, the demand for natural uranium resulting from enrichment contracts continues to exceed largely the real needs of the reactors, so that operators are holding considerable reserves of both natural and enriched uranium.

On the supply side, new possibilities, principally in Australia and Canada, could increase existing resources, enabling operators to pursue a policy of diversifying their sources of supply. Thus a part of the envisaged future production from the new fields has already been subject to long-term contracts.

The excess of supply over demand has reduced the risks of deliveries being interrupted, as shown by the fall in "spot" prices; on the other hand, prices paid within the Community in respect of term contracts have not shown a tendency to increase. This is clearly important since the Community relies on imports for 80% of its uranium supplies. Contracts agreed have been practically restricted to the natural uranium sector.

With regard to enriched uranium, a continuing situation of surplus exists in the world market, given the decline and change in demand. The contracted surpluses in the Community of enriched uranium have been reduced by recourse to the flexible arrangements provided for in the contracts and through the ending of enrichment services.

Requirements of low enriched uranium are to an increasing extent being met by Community producers, which is the case also for the plutonium needed for fast-breeder reactors, the recycling being undertaken within the Community. The Community remains dependent on the United States for the whole of its supply of highly enriched uranium.

Table 1: Gross inland consumption of energy in the Community

	1979 (Eurostat)		1980 (Eurostat)		1981* Estimates		1982 Forecasts	
	M toe	%	M toe	%	M toe	%	M toe	%
Hard coal and equivalents	191.3	19.4	189.8	20.1	184.3	20.5	185.0	20.3
Lignite and equivalents	32.1	3.2	32.9	3.5	33.3	3.7	33.0	3.6
Crude oil and equivalents	536.6	54.5	493.8	52.3	450.0	50.0	448.0	49.2
Natural gas	172.4	17.5	169.3	17.9	161.0	17.9	163.0	17.9
Nuclear energy	37.2	3.8	42.7	4.6	56.4	6.2	66.5	7.3
Hydro and others	15.2	1.6	15.4	1.6	15.0	1.7	15.5	1.7
TOTAL**	984.8	100.0	943.8	100.0	900.0	100.0	911.0	100.0

* provisional data
 ** including other fuels

Table 2: Percentage variation in GDP and energy consumption

	1980-1979	1981-1980 (estimates)	1982-1981 (forecasts)
	Gross Domestic Product	+ 1.1	- 0.5
Energy inland consumption of which:	- 4.2*	- 4.6	+ 1.2
- Oil	- 8.0*	- 8.9	- 0.5
- Solid fuels	- 0.3	- 2.3	+ 0.2
- Natural gas	- 1.9	- 4.9	+ 1.2
- Nuclear energy	+14.8	+32.2	+18.0
- Hydro, geothermal and others	-	- 2.6	+ 3.3

* the size of this decline in energy and oil consumption was largely a reflection of the severe winter which inflated demand in the previous year

Table 3: Energy supply in the Community

(M toe)

	1979 (1)		1980 (1)		1981*		1982	
	Prod- uction	Net imports**	Prod- uction	Net imports**	Prod- uction	Net imports**	Prod- uction	Net imports**
Solid fuels	180.2	33.8	185.1	47.3	184.3	42.6	184.0	42.0
Oil	89.3	487.3	91.1	437.9	96.3	366.3	106.0	366.0
Natural gas	137.5	36.2	129.2	40.6	120.2	41.8	116.0	47.0
Primary electricity, etc.	50.9	1.4	56.7	1.4	70.1	1.3	80.5	1.5
TOTAL	457.9	558.7	462.1	527.1	470.9	452.0	486.5	456.5

(1) Eurostat

* provisional data

** imports minus exports

Annex 2

Table 1: EUR-10 - Oil consumption, production and imports (m t)

	1980*	1981/80	1981	1982/81	1982
		%	(estimates)	%	
<u>Consumption</u>					
- Inland	492.6	- 8.6	450.0	- 0.5	448.0
- Bunkers	<u>27.1</u>	<u>-11.4</u>	<u>24.0</u>	<u>-</u>	<u>24.0</u>
<u>Total</u>	519.7	- 8.8	474.0	- 0.4	472.0
<u>Production **</u>	90.7	+ 6.2	96.3	+10.1	106.0
<u>Stock change</u>	<u>+ 9.0</u>	<u>-</u>	<u>-11.4</u>	<u>-</u>	<u>-</u>
<u>Net imports</u>	438.0	-16.4	366.3	- 0.1	366.0

* Eurostat

** Including recovery

Table 2: Average EEC consumer prices (before tax) and crude oil costs¹

\$/tonne		12/79	6/80	12/80	6/81	12/81 (est.)
Premium gasoline		386	483	462	432	475
Regular gasoline		379	464	446	425	461
Auto. gasoil		326	408	388	360	402
Heating gasoil		303	370	358	329	371
Residual fuel > 1% S		167	191	213	208	205
Average	\$/m t	279	340	336	315	334
Proceeds ²	Index	100	122	120	113	120
Crude oil	Index	100	122	130	134	135
CIF cost	\$/m t	203	247	263	273	275

¹ Prices are derived from data provided by Member States under the Community Information and Consultation Procedure (Council Directive 76/491/EEC).

² "Average proceeds": Individual product prices are weighted according to the 1980 consumption of each main product.

Table 1: Solid fuel supply situation (EUR=10)

(m t)

		Production	Imports	Exports	Other changes ¹	Gross inland consumption
<u>1980</u>	Coal	247	74	- 1	- 7	313
	Coke	68	1	- 4	- 2	63
	Lignite + turf	162	2	-	-	164
<u>1981</u> ²	Coal	246	70	- 4	- 7	305
	Coke	65	1	- 4	- 1	61
	Lignite + turf	165	1	-	-	166
<u>1982</u> ³	Coal	246	68	- 3	- 6	305
	Coke	63	1	- 3	- 1	60
	Lignite + turf	165	1	-	-	166

¹Included in this figure: stock movements, small mines production, recovery and different statistics.

²Provisional data.

³Estimates.

Table 2: CIF price of Community coal imports

(\$/m t)

Year	Quarter	Coking coal			Steam coal		Relation $\frac{(b)}{(c)}$
		(a)	(b)		(c)		
		Standard quality (1)	Tce (2)		Tce (2)		
		\$/t	%	\$/t	%	\$/t	
1980	I	69	100	65	100	54	120
	II	69	100	65	104	56	116
	III	69	100	65	109	59	110
	IV	70	102	66	117	63	105
1981	I	76	109	71	128	69	103
	II	80	115	75	135	73	103
	III	84	122	79			
	IV	87	126	82			

(1) Standard quality (C = 6%; E = 5%; MV = 24%; calorific power = 31.1 kJ/kg)

(2) Tons of coal equivalent (calorific power = 29.3 kJ/kg)

Table 1: Net consumption (= available for internal market) of electrical energy (including losses) (TWh)

Year	EUR-10
1980	1 214.2
1981	1 211.2
1982	1 240.5
Variations:	
1981/80	- 0.2%
1982/81	+ 2.4%

Annex 4

Table 2: Net production of electrical energy

EUR-10	Total	of which: by energy source							Deriv. gas & others	
		Hydro- electric	Geo- thermal	Nuclear	Conven. thermal	Coal	Lignite	Petrol. products		Natural gas
Net production:		TWh								
1980	1 207.3	146.2	2.6	149.4	909.1	406.5	102.9	264.6	107.6	27.5
1981	1 200.0	148.0	2.6	197.5	851.9	400.8	107.1	226.9	89.5	27.6
1982	1 241.0	142.0	2.7	233.3	863.0	417.3	109.3	206.1	102.5	27.8
Variations:		%								
1981/80	- 0.6	+ 1.3	+1.2	+32.2	- 6.3	- 1.4	+ 3.9	-14.1	-17.0	- 0.2
1982/81	+ 3.4	- 4.1	+3.8	+18.1	+ 1.3	+ 4.1	+ 2.1	- 9.1	+14.6	+ 0.6
Share in total:		%								
1980	100	12.1	0.2	12.4	75.3	33.7	8.5	21.9	8.9	2.3
1981	100	12.3	0.2	16.5	71.0	33.4	8.9	18.9	7.5	2.3
1982	100	11.5	0.2	18.8	69.5	33.6	8.8	16.6	8.3	2.2

Table 3: Share of nuclear and solid fuels in energy inputs for electricity production

%	EUR-10	B	DK	D	GR	F	IRL	I	L	NL	UK
1980	63.4	54.5	79.8	75.1	50.4	61.8	24.9	13.4	57.5	19.0	86.7
1981	67.8	61.9	84.9	78.8	60.6	71.6	24.9	15.4	64.6	21.8	89.5
1982	69.9	65.3	87.0	79.6	64.3	76.9	28.7	17.1	66.0	28.0	89.0