

GREEN EUROPE

NEWSLETTER ON THE COMMON AGRICULTURAL POLICY



EUROPEAN AGRICULTURE INTO THE NINETEEN-EIGHTIES



**EUROPEAN
AGRICULTURE
INTO THE
NINETEEN-EIGHTIES**

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169

The Annual Report on the agricultural situation (1) in the Community for 1979, published by the Commission, includes an important chapter headed "The outlook". This contains a survey of the probable development of Community agriculture over the next decade, and the principal problems with which it will be faced.

Most of this text, in a slightly adapted form, in view of its considerable interest, is reproduced in this issue.

(1) See "Green Europe - Newsletter on the Commission's Agriculture Policy" N° 168

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I. THE OVERALL CONTEXT

It is only possible to sketch the future development over a decade of a sector such as agriculture by adopting at the outset certain lines of reference which must perforce be largely hypothetical. We may therefore assume that the following factors will determine in the period between 1980 and 1990 the overall situation and trends, within which the development of Community agriculture will fall.

The general economy

- population will grow slowly,
- economic growth will continue at 3% or 4% a year, in real terms,
- unemployment will increase, or at least remain a problem,
- inflation will continue but at a slower rate than in the recent past,
- recently observed tendencies for Member States' economies to converge will continue, especially after the European Monetary System (EMS) entered into force,
- real energy prices will remain high and will probably tend to increase,
- supplies on world commodity markets will, for most of the period, stay at a high level and be sufficient to satisfy international commercial demand,
- awareness of environmental considerations and the quality of life will increase.

The enlargement of the Community

It is assumed that not only Greece, but also Spain and Portugal will progress towards full membership of the EEC during the 1980's. The common agricultural policy will have a progressive effect in these three countries in the early part of the 1980's but, except for Greece, its full effect will not be felt until after 1990.

The Agricultural Policy

The objectives set out in the Treaty of Rome remain valid. Therefore, faced with the problems of serious market imbalances, income disparities within agriculture and the effects of monetary disorder, the following policy guidelines can be used: (1)

- restrictive price policy as long as major market imbalances exist,
- reinforced measures in the milk sector,
- strengthening and adaptation of structural policy to take better account of regional needs, specific market difficulties and the changing economic environment,
- the principle of unity of the common agricultural market will be maintained and monetary compensatory amounts (MCA) will be systematically dismantled,
- accessionary compensatory amounts (A.C.A.) in the three new member countries will be phased out progressively,
- long-term stability of world trade.

II. DEVELOPMENT OF AGRICULTURE UNTIL 1990

Agricultural prices

An appropriate price policy which aims to achieve market balance must take account of various factors which may be contradictory: unity of the market, farm incomes, inflation rates.

The progressive reduction of MCA's will have different effects on the agricultural support prices in Member States. In countries with negative MCA's, support prices in national currencies will rise (France, Italy and the United Kingdom). Elimination of positive MCA's (Germany, Belgium, Luxembourg and the Netherlands) will result in relative decrease of support price in national currencies.

(1) The medium-term development of the CAP was presented to the European Council in December 1978 in Commission document "Future Development of the Common Agricultural Policy".

At EEC level, considering the respective weights of both groups of countries in agricultural production, the average of agricultural support prices, expressed in national currencies, would rise if MCA's were eliminated.

During the period under review Accessionary Compensatory Amounts introduced to allow price levels in Greece, Spain and Portugal to adjust towards the EEC level, will have to be phased out progressively. This will have an upwards effect on the EEC average of prices expressed in national currencies.

The increase of agricultural input prices is assumed to follow inflation in the general economy, except for inputs coming from domestic and foreign agriculture (feed and seed) where real prices are expected to decrease, while real prices for fuel and electricity and inputs with high-energy content (nitrogen) may increase.

Technological progress is expected to continue at the same rate as in the past in terms of animal husbandry, crops and equipment.

Demand and supply

By 1990 the number of consumers in the Community of 12 will have risen to 323 million people. Of the extra 64 million compared to the present EEC-9, 55 million people will enter with the new Member States and the rest will result from slow population growth.

	: Year :	Unit :	EC-9 :	EC-12 :
Population	: 1977 :	Mill. :	259 :	314 :
	: 1990 :	Mill. :	261 :	323 :
	: 90/77 :	% p.a.(1) :	0.06 :	0.2 :

(1) Percentage of annual increase

Per capita consumption is also expected to increase slowly as the part of the family budget spent on food is decreasing. This is one of the factors which may increase relative abundance on some markets for agricultural products. Consumer tastes will tend towards high quality products and processed products with high value added (including beverages). The growth in the three new members may be quicker as a result of faster-than-average increases in disposable incomes.

Commercial demand for basic agricultural commodities from third countries will remain limited and tough competition will be felt on world markets both from industrialized and developing countries. This, together with the continuing gap between Community and world prices, means that if the EEC is to maintain its share of world markets, effective export mechanisms within the framework of the CAP and commercial efforts will be of prime importance.

In order to maintain a rate of income growth comparable to other sectors, farmers will tend to increase the application of technology and to intensify production (greater use of fertilisers, compound feeds, equipment). Agricultural output will tend to increase.

With demand, both internally and externally, increasing only slowly and production growing more quickly, the tendency of production to outstrip consumption will continue. This conclusion is true for almost all products, not only those which are presently in surplus. Enlargement of the Community may intensify demand-supply imbalances for some products (olive oil, wine) and will not modify significantly the overall tendency to surplus.

The increasing demand for special and less conventional products (health foods, the raising of game, e.g. fallow deer) combined with the difficulties that will be encountered on agricultural markets will stimulate the production of that type of product or the development of farms as tourist enterprises (pony trekking, wild-life parks). But these developments will apply to a limited number of farms.

The situation for timber and timber products is entirely different: the Community has a deficit of 60%. Annual imports already exceed exports by some 8 000 million European Units of Account (equivalent to about one third of world trade) and demand is expected to go on growing faster than domestic supply. In the longer term this could lead to difficulties as competition for wood on the world market increases.

Production factors and structures

The utilised agricultural area in the Community and the three new Member States totals 147 million hectares, with an extra 55 million hectares of woodland. The agricultural area is expected to diminish in the years up to 1990 while woodland will increase.

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:           : Year : Unit : EC-9 : EC-12 :
:-----:-----:-----:-----:-----:
: Utilised agri- : 1977 : mill.ha : 93 : 147 :
: cultural area : 77/68 : % p.a. : -0.5 : - :
:           : 77/73 : % p.a. : -0.2 : - :
:-----:-----:-----:-----:-----:
: Forest          : 1977 : mill.ha : 32 : 55 :
:           : 77/68 : % p.a. : 0.4 : - :
:           : 77/73 : : 0.2 : - :
=====

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The agricultural labour force totals 13.6 million people in the Community including the three new Member States. This corresponds to about 11% of the total labour force. The outflow of labour from agriculture by retirement or movement to other sectors, will, to a large extent, depend on the performance of the total economy, the income situation of farmers, price policy and rising costs. At least 3 1/2 million people are expected to leave agriculture by 1990 (about 2.3% p.a.). This figure corresponds largely to retirement from farming of older people. Indeed, no less than 44% of farmers and 25% of the total employed in agriculture, are over 55 years of age (1975 EEC-9) compared with 14% in the total economy.

Given employment difficulties in the total economy, the reduction of labour force and growth of labour productivity in agriculture will depend critically on the rate of retirement. This will be substantially influenced by the attractiveness of retirement incentives and expected income.

	Year	Unit	EC-9	EC-12
-Total civilian labour force	1977 1990	millions millions	107 111	
-Civilian employed labour force	1977 1990	millions millions	101 100	(125)
-of which in agriculture	1977 1990	millions millions	8.3 5.6	13.6 8.6
	90/77	% p.a.	-3.0	-2.3
Labour force agriculture/total	1977 1990	% of total % of total	8.2 (5.5)	10.9 (7.3)
	90/75	% p.a.	-3%	-3%

- 1) assumed retirement rate
- 2) based on outflow 73-77 in EEC-9
- 3) based on outflow 68-77 in EEC-9

The trend towards bigger and fewer farms will continue. The present average farm of 17.2 hectares will increase by about 2.3% a year to 24 ha by 1990. At the same time, the number of farms can be expected to decrease by about 2 1/2% a year from 9 mill. to 6.6 mill. in EEC-12. The part of smaller farms in the total will diminish by more than 10 percentage points. Medium and big farms will account for a greater share of the total number of farms.

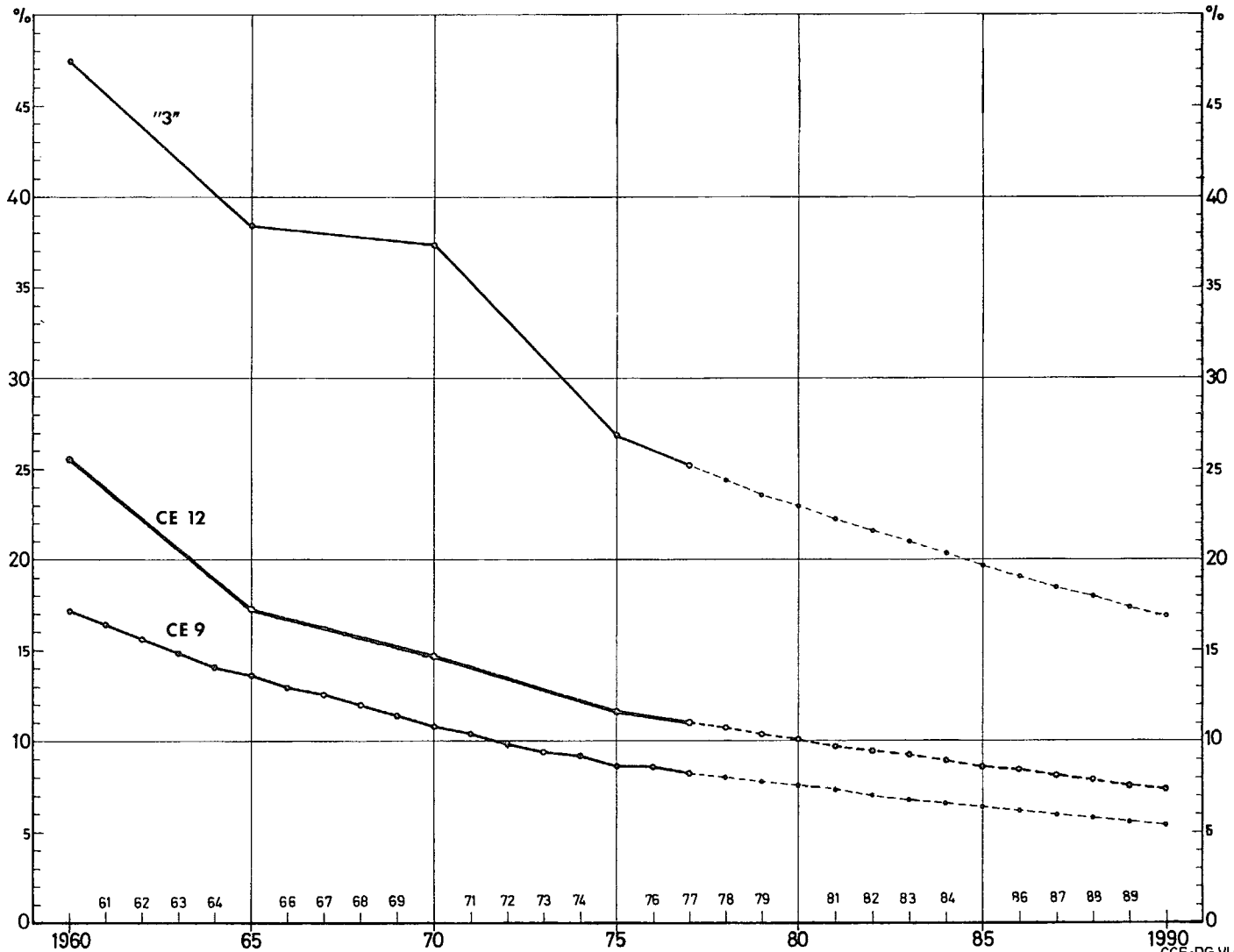
	Year	Unit	EC-9	EC-12
Number of farms	1975	millions	5.1	8.9
of 1 ha and more	1990	millions	3.65	(6.6)
	90/75	% p.a.	-2.5	.
Utilised agricultural area per farm	1975	ha	17.2	.
	1990	ha	24.2	.
	90/75	% p.a.	2.2	.
Heads of holdings of 1 ha or more using % of working time on their holding	1975			
100%		% of total	36	.
between 50 & 100%		"	20	.
less than 50%		"	44	.

The relative importance of part-time farming, which already occurs in 64% of the total number of farms in EEC-9, is likely to increase. An amount of this increase will depend, at least in part, on the possibilities of moving out of agriculture into full-time non-agricultural employment.

An intensification of agricultural production can be expected as a result of the need for an acceptable agricultural income. In addition rising costs and a restrictive price policy will stimulate farmers to increase labour productivity by increasing inputs and taking up new technology. This increase may be faster in the agricultural sector than in the economy as a whole, as it has been in the recent past.

	Year	Unit	Agriculture	Total economy
Rate of growth of productivity in EEC-9	77/65	Gross Domestic Product in real terms per person occupied	5.7	3.6
	90/77	% pa	5.2	3.0

RELATIVE SHARE OF AGRICULTURE IN TOTAL CIVILIAN EMPLOYMENT EC-9, 3(FUTURE MEMBERS AND EC-12



In general, the greater intensification of agricultural production and the demand for land for non-agricultural purposes will lead, together with inflation, to continuing increases in land prices and rents. In areas where population density is low and social infra-structure is lacking, there may be a low demand for land for non-agricultural purposes and land prices and rents may drop. Under such conditions, high labour productivity can be achieved by a more extensive type of farming in contrast to a more "industrialised" type in other areas.

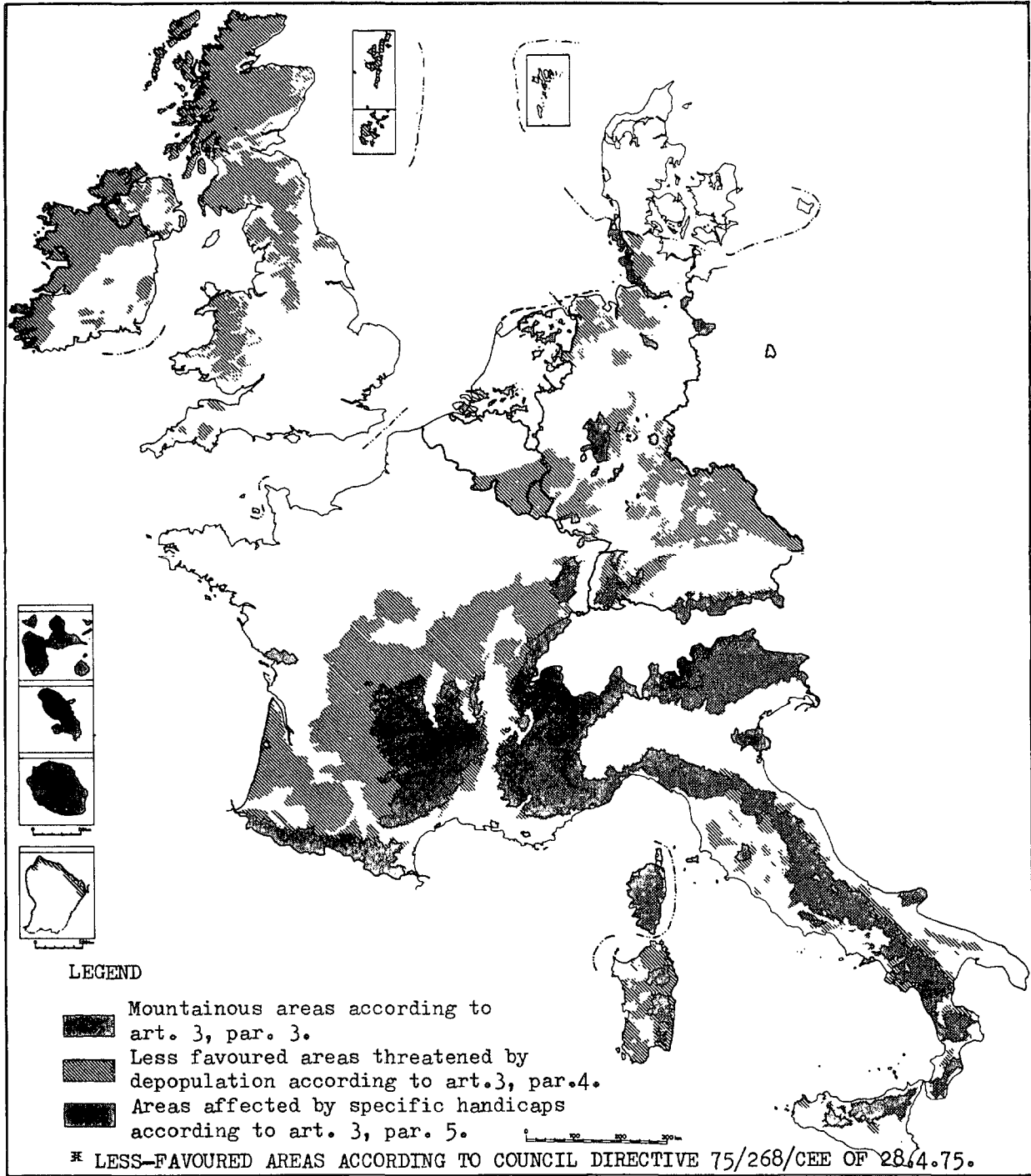
The reduction in the agricultural labour force and reduced opportunities for self-financing will lead to increased demand for borrowed capital in farming. Agriculture is already a capital intensive activity. In modern dairy farms of more than 50 ha. farm capital per labour unit is around 40.000 EUA. In corresponding cereal farms it is around 30.000 EUA. The observed annual increase of live and dead stock capital is as high as 5% and gross formation of fixed capital corresponds to between 20 and 36% of gross value added. Agriculture will be faced with stronger competition on the capital market and will have to pay higher interest rates and higher capital charges. Investments in the agricultural sector will therefore be more difficult and require higher capital productivity.

The greater intensification of agriculture implies greater dependence on energy. High energy prices will lead to the development of energy saving techniques and the use of new energy sources (farm produced, solar energy, etc.).

Agriculture and regional discrepancies

On a regional level varying forces will be at work in agriculture. Some, as in the past, will have the effect of increasing differences between regions, others may tend to reduce the disparities. Increasing costs - together with the growing need for inputs and for capital - and a restrictive price policy will weaken the competitive position of regions which already have difficulties in keeping up with developments in agriculture and the general economy. Mountainous and other less-favoured regions, which cover about 34 million hectares, more than 1/3 of utilised agricultural area in EC-9 and carry 1/6th of the

MOUNTAINOUS AND LESS-FAVoured AGRICULTURAL AREAS [⌘]



Community's milk cows, will be most affected. The entry of three new Member States, where such areas also account for a large proportion of the utilised agricultural area, may increase regional disparities in EEC-12.

Problems in these areas become even more acute when account is taken of increasing incomes in the rest of agriculture and other sectors of the economy. Efforts to improve farm structure may conflict with the desire to maintain a certain population density and social infrastructure. If the social infrastructure is broken, the abandonment of farms becomes more likely.

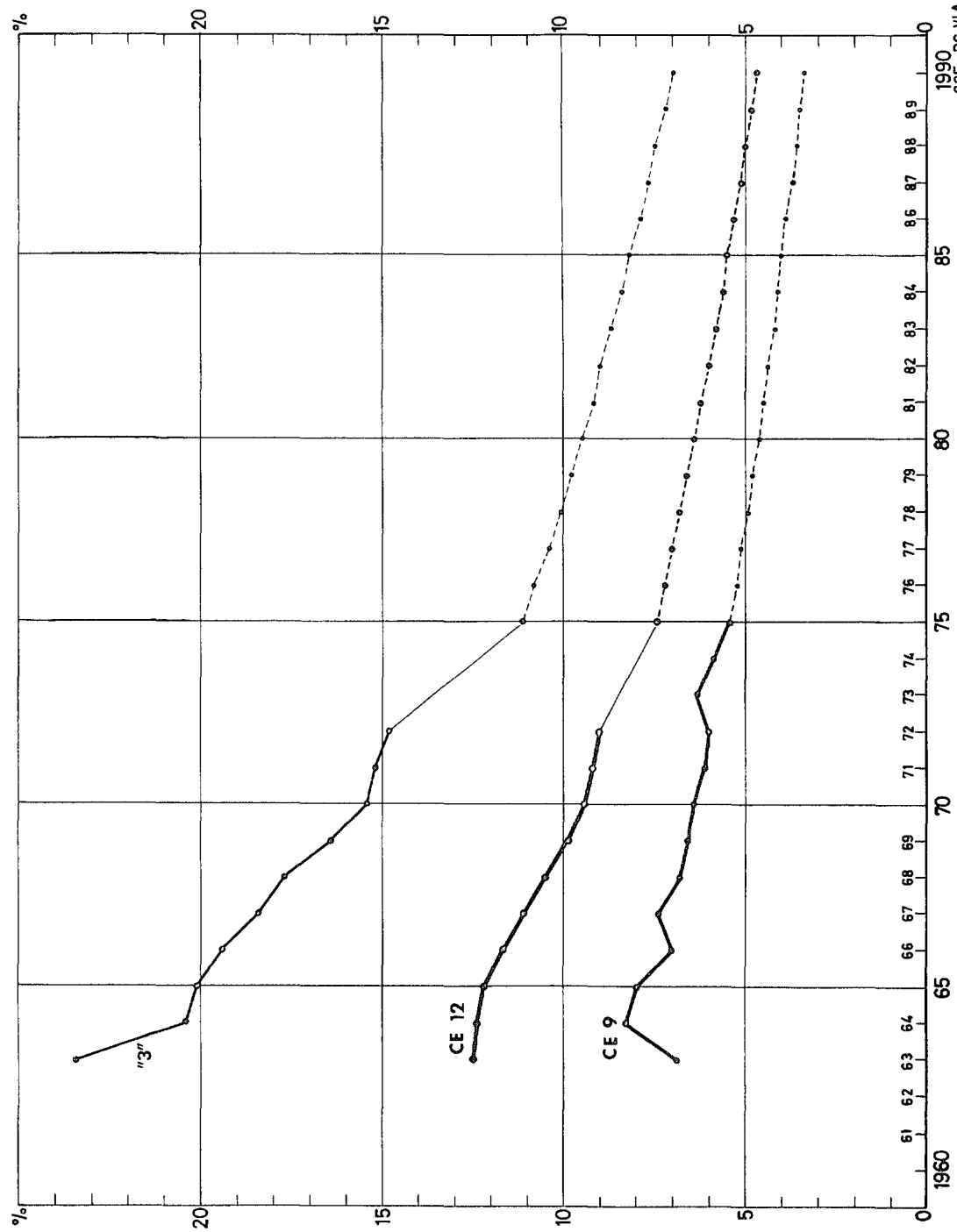
Regional difficulties in the general economy and in agriculture will require global development, bigger income transfers to less-favoured regions and special structural measures for the development of their agriculture. The effort to improve land quality and productivity by drainage, irrigation and by re-allotment will have the most noticeable effect in these poorer and less-favoured agricultural regions. If farming is to continue in these areas, the brunt of adjusting production to demand (for example, in the milk sector) will have to be borne by other regions of the Community.

On the contrary, the continued convergence of Member States' economies including the effect of the EMS may have the effect of lessening regional differences. The elimination of MCA's with the consequent price changes in national currencies will, with the exception of the relative position of less-favoured areas within strong currency regions, have a similarly convergent effect in agriculture.

Agriculture in the overall economy

Agriculture will continue to decline in economic importance during the 1980's. In the Community, including the three new Member States, agriculture accounts for about 7% of Gross Domestic Product and 11% of the total work force. By 1990, agriculture's part will be reduced to 4 1/2% of the Gross Domestic Product and 7% of the total labour force (see graphs). This trend towards a declining labour force will be even stronger if the employment situation in other sectors of the economy improves.

SHARE RELATIVE OF AGRICULTURE IN TOTAL GROSS DOMESTIC PRODUCT, CE-9, 3-FUTURE MEMBERS AND CE-12



1990
CCE - DG VI A/2 - 7903 .30

But the decreasing relative importance of agriculture will be offset by increases in the importance of agricultural supply and food processing industries. As agriculture becomes more input intensive, the supply industries will grow in importance. Changing demand patterns will lead to the production of more convenience foods (frozen vegetables, TV dinners). About 2/3 of agricultural production is already processed by the food industry whose turnover has increased by about 10% per year in the recent past. The relative importance of this agrifood-complex (supply industries, agriculture, food processing) will probably remain constant at about 15% of Gross National Product.

The move towards specialisation and intensification (input of fertilisers, pesticides, feed additives) will result in increased risks for the environment in terms of product quality and pollution. Large scale irrigation, drainage and re-allotment projects and changes of agricultural use of land may modify ecosystems. Where land is abandoned, problems may occur in areas exposed to natural risks: erosion, avalanches, landsliding. Increasing food processing may bring product quality problems (sanitary, nutritional, organoleptic as well) for the consumer and the problem of management of waste, mainly organic.

The 1980's are likely to see growing public expenditure on agriculture. The continued tendency for production to grow more quickly than demand will necessitate continued high levels of expenditure on market support measures, either in the form of intervention purchases and export refunds or of direct payments to producers. In addition, regional difficulties will require bigger income transfers to less-favoured regions and special structural measures for the development of their agriculture.

III. MAJOR PROBLEMS AGRICULTURE WILL FACE

The evolution of agriculture that has been described will lead to various, sometimes complex, conflicts that will require the permanent adjustment and adaptation of existing policies together with policy innovations.

Surplus production and the growing costs of the common agricultural policy will remain problem areas. An appropriate price policy, compounded by higher land prices and rents, growing input costs and higher capital charges, will lead to smaller margins. Increasing salaries in non-agricultural sectors will lead to expectations of "higher" incomes for farmers. This discrepancy may be resolved partly by improved productivity and partly by the outflow of labour from agriculture.

Outflow of farm labour depends on conditions in the general labour market. Taking into account the difficulties of structural unemployment, the outflow of farm labour force may be limited to mainly older people retiring from farming activity. Nevertheless, the top-heavy age structure of the agricultural labour force will lead to an outflow of 2.3% per annum of 3 1/2 mill. persons until 1990. The financial incentives to encourage retirement of older farmers compared with farm income will influence this rate of outflow.

Food aid will remain primarily a development instrument and means of assistance in cases of catastrophe. It is assumed that it is not a systematic method for the disposal of EEC surplus production. Its greater use to solve nutritional problems in developing countries will depend upon financial possibilities and political commitment.

The growing deficit of timber together with the surplus production of several agricultural commodities calls for a transfer of agricultural land into woodland. The effect on timber supply cannot be expected until after 1990; the effect on agricultural surplus production will be immediate but limited as mainly marginal land will be used for this purpose.

An increase of non-utilized agricultural land may be expected until 1990, mainly in areas of marginal land and low population density. In areas with high population density and developed industries, conflicts may arise between the use of land for agricultural, industrial, urban and recreational purposes.

The changing pattern of farm types will lead to a decreasing total number of farms and highly capitalised (mostly intensive) units will assume a larger proportion. Part-time farming, sometimes considered as a transitional phenomenon, will account for a growing share of the total number of farms, but will require complementary activities, either in local industry, or other activities such as agri-tourism and services.

The greater intensification of agriculture implies a greater input of fertiliser, pesticides, feed additives, equipment. This may raise a problem of increased risks for the environment in terms of product quality and pollution.

The unit of agricultural markets is expected to be reestablished by 1990. The phasing out of MCA's will reinstate the agricultural sector in the overall economy and allow production to move within the Community on a basis of comparative advantage. The effect of dismantling MCA's will vary according to monetary regions. In regions with positive MCA's it will lead to a relative reduction of farm prices in national currencies which will be an additional stimulus for structural change. This will have a particularly severe effect on less-favoured areas in these regions.

In regions with negative MCA's the dismantling will lead to relative price increases which will allow the most unfavoured areas to improve their situation within the Community.

Apart from monetary influences, regional disparities are likely to grow. The gap between non-agricultural and farm incomes will stimulate labour outflow from agriculture. In regions with limited alternative activity and a weak social infrastructure this may entail migration from the region. This is contrary to the objectives of regional policy which aims to maintain an acceptable population density and reasonable infrastructure. Where natural risks exist, abandonment of land would create environmental problems.

The need to reduce current structural surpluses of some major agricultural products in the Community conflicts with the maintenance of the current level of import of agricultural products, equivalent to 10 mill. ha., for food and feed.

The need to continue farming activity in less-favoured areas, despite less favourable economic conditions, conflicts with the restrictive policy which is particularly severe in these regions. Specific structural measures for increasing productivity in these areas will improve the regional situation but aggravate the problems of market balance at EEC level.

As a consequence the more productive regions will have to bear the brunt of the effects of both imports and maintaining farming activity in the less-favoured areas.

The Community's market organisation system for agricultural products aims, besides stabilising markets, to provide an agricultural income comparable with other sectors and incentives to improve farm structure to allow it to compete with third countries. As a means to this, high stable prices have been introduced. Under these conditions, problems can be expected to continue where prices of farm products (determined by agricultural policy) differ greatly from those of their substitutes (often determined by commercial policy). An example of this in the past was the price difference of protein in milk and in soya, and more recently that between cereals and manioc. Problems of overproduction, export difficulties, reduced consumption because of farmers' preference for low-priced substitute inputs and regional specialisation occur as a result.

Growing public expenditure for agriculture in order to keep the balance on the markets for supported products and to ensure necessary transfers to less-favoured areas will be an essential challenge for agricultural policy in the 1980's.

On the budget side, the 1980's will require higher Community efforts in the field of structural adjustments. And it is not excluded that increasing costs of managing surplus markets will make it necessary for the producers to share the financial burden through some form of co-responsibility.

IV. SUMMARY AND CONCLUSIONS

The existence of an efficient agricultural industry is a vital element of the European Community. A prosperous agriculture must also be maintained in the future in order to assure food supplies to consumers and to enable the Community to fulfil its role as an exporter of agricultural commodities. The common agricultural policy has secured in the past and will secure in the coming years an appropriate development of the agricultural sector.

Agricultural problems

The imbalance between supply and demand in several major agricultural markets will remain a problem throughout the 1980's and may be intensified for some products by Community enlargement. These imbalances will be due to a number of factors: the growth of productivity, the stagnation of internal consumption, the difficulty of finding new export outlets including the possibility of increased food aid and the competition of substitute products.

Income disparities within the agricultural sector will remain substantial. Growing input and environmental costs and higher capital charges will have a relatively greater impact in certain less-favoured regions because of the difficulty to increase productivity. Regional income disparities will be affected by the price effect of phasing out Monetary Compensatory Amounts (MCA's).

The European Monetary System will permit the gradual elimination of existing MCA's and thus end the separation of the agricultural sector from the rest of the economy. But the elimination of negative MCA's will lead by itself to an increase of support prices in some national currencies whilst the elimination of positive MCA's will have the opposite effect.

In the 1980's, the tendency for production to grow quicker than demand will probably necessitate high levels of expenditure on market support measures, either in the form of intervention purchases and export refunds or of direct payments to producers. Regional difficulties will demand a bigger income transfer to less-favoured regions and special structural measures for the development of their agriculture.

The Agricultural Policy

The 1980's will require a constant effort to recreate or maintain a balance between demand and supply in agricultural markets. In markets that will be characterised by shortages (timber, oilseeds), this will require measures to stimulate production. In markets that will be characterised by persistent surpluses (for example milk), this will require measures to increase and develop consumption and to curb production. Achievement of market balance will require solutions in the context of international agreements in particular for problems posed by substitute products.

The decision to eliminate MCA's, along with the tendency for the production of several commodities to grow more quickly than demand, strengthens the need for the continuation of an appropriate price policy as long as surpluses exist.

This policy must also take account of the contribution that agriculture can make to the Community's balance of payments through its role as an exporter, a role that will become more important as the world's need for foodstuffs increases.

A policy appropriate to the problem of surpluses may, coupled with the increase of agricultural costs due to inflation, lead to some pressure on farm incomes. This can be offset and incomes maintained or increased by the development of labour productivity. Given unemployment in the overall economy and given the fact that in some regions the number of young farmers is already too low so that they must be held on the land, the growth of labour productivity will depend critically on the rate of retirement of old people from agriculture and therefore on a reinforcement of present retirement incentives for older farmers.

Existing surpluses in many sectors will make it impossible to solve regional income problems through across-the-board price rises. Greater emphasis will have to be placed on a strengthened and flexible structural policy and on special actions for disadvantaged regions. These actions could take the form of specific programmes for the agricultural development of these regions and/or for integrated programmes in which the improvement in the agricultural situation is only one element in the development plan.

On the budget side, the 1980's will require higher Community efforts in the field of structural adjustments. And it is not excluded that increasing costs of managing surplus markets will make it necessary for the producers to share the financial burden through some form of co-responsibility.

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