COMMISSION OF THE EUROPEAN COMMUNITIES

COMMUNITY SUPPORT FRAMEWORK 1991-93

Processing and marketing of fishery and aquaculture products (Objective 5a)

IRELAND

DOCUMENT

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Cataloguing data can be found at the end of this publication.

Luxembourg: Office for Official Publications of the European Communities, 1992

ISBN 92-826-3967-3

Printed in Germany

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Preliminary note

Under Article 8 of Council Regulation (EEC) No 2052/88 of 24 June 1988 (OJ L 185, 15. 7. 1988, p. 9), all regions of Ireland are covered by Objective 1 of the reform of the structural Funds.

This document is an addendum to the Community support framework approved by the Commission on 31 October 1989.

Introduction by Mr Marín

Vice-President of the Commission and Member responsible for fisheries

The Community support frameworks (CSFs) provide the context within which the Member States can apply to the Commission for finance.

The CSFs in the processing and marketing sectors for fish and aquaculture products are linked to the achievement of Objective 5a of the reform of the structural Funds.

This part of the fishing industry is among those economic activities to benefit from the Single European Act. The underlying principles governing the reform of the Funds — concentration, partnership, mutually consistent policies, programming, additionality — also apply to these sectors.

The priority schemes for regions whose development is lagging behind come under the CSFs for Objective 1 of the reform. All assistance to the territory of the former German Democratic Republic is covered by a CSF especially for the new *Länder*, to be published separately.

The 11 Community support frameworks (Luxembourg has not submitted a sectoral plan) represent a nominal financial commitment on the Community's part of some ECU 180 million in the years 1991 to 1993, which is one and a half times the amount of aid granted during the years before the reform.

The processing and marketing of fish and aquaculture products represent important sectors in the economic activity of certain regions and developing them contributes to economic and social cohesion.

The regions concerned are having to meet the challenges of an increasingly fierce competitive climate and major problems involving restructuring and adjustments in the fields of technology and hygiene.

The Community's assistance is therefore geared toward:

(i) improving the competitiveness of the sector within the context of completing the internal market and of increased competition from non-member countries;

(ii) guaranteeing a constant flow of inputs of raw materials;
(iii) contributing to the application of Community hygiene and public health standards and greater attention to the quality of the environment.

The Member States, in concert with the Commission, are required to implement the various forms of assistance on the basis of the Community support frameworks, particularly through operational programmes.

The first priority for Community assistance is building, modernizing and rationalizing auctions and markets and facilities for preparing and processing fish, developing new products, improving quality and hygiene in production and marketing processes and increasing the value-added of products.

Since individual investment schemes are allowed for in the overall programming, economic agents in the fishing sector will also be able to profit from certain advantages in connection with the processing and marketing of fish and aquaculture products:

(i) more precise knowledge of the objectives pursued by the Community;
(ii) greater transparency of Community support;
(iii) less risk of dissipation of funds;
(iv) better monitoring and evaluation of the actual impact of the assistance.

It is to be hoped that all the structural measures relating to the fishing and aquaculture sector — including those concerning fishing fleets — will be incorporated in the Community's structural instruments in the near future.

Manuel Marín

Objectives of the structural Funds

Community action through the structural Funds, the EIB and other existing financial instruments shall support the achievement of the general objectives set out in Articles 130a and 130c of the Treaty by contributing to the attainment of the following five priority objectives:

1. promoting the development and structural adjustment of the regions whose development is lagging behind (Objective 1);

2. converting the regions, frontier regions or parts of regions (including employment areas and urban communities) seriously affected by industrial decline (Objective 2);

3. combating long-term unemployment (Objective 3);

4. facilitating the occupational integration of young people (Objective 4);

5. **with a view to reform of the common agricultural policy:**
   (a) speeding up the adjustment of agricultural structures (Objective 5a),
   (b) promoting the development of rural areas (Objective 5b).

1. General economic background

1.1. General

Although Ireland is geographically well placed to build a strong fishing and fish-processing industry, substantial investment is needed to develop further and modernize all sectors.

The industry has grown significantly over the past 10 years and provides employment for an estimated 1.4% of the workforce. It is particularly important to Ireland since it provides employment in areas of high unemployment and rural communities where little or no alternative employment opportunities exist. Ireland has one of the highest rates of unemployment of Member States representing 16.6% of the total workforce. It is estimated that 13 400 people are employed on a full- or part-time basis within the fishing, fish-processing and aquaculture industries together with 1 400 people in the provision of ancillary services.

Since 1976 fish landings have increased from 89 000 to 247 000 tonnes in 1989 and as such the development of landing facilities and port infrastructure generally requires upgrading, redevelopment and modernization, particularly in terms of quality and hygiene, to cope efficiently with this expansion in supply.

The fish-processing industry has also grown significantly over the period and investments are required to help create a mature fish-processing industry that will maximize the use of available raw materials and employment opportunities.

Fishery product exports in relation to total exports are amongst the highest in the European Community and are valued at IRL 143 million per annum (ECU 186 million).

1.2. Fishing fleet

The Irish fishing fleet consists of approximately 1 450 vessels, the majority (64%) of which are less than or equal to 12 metres in length, and there are a number of vessels in excess of 18 metres (18%). A number of vessels have been modernized to improve efficiency and safety. About 40% of the vessels in the less than or equal to 18 metres category are multipurpose vessels suitably equipped to use two or more types of fishing gear. The majority of vessels, however, are involved in inshore and midwater fishing activities. The fleet provided employment for approximately 5 500 people in 1989 and is a particularly important source of employment in coastal regions.

The Irish fleet development programme is focused on the consolidation, modernization and renewal of vessels. The aim of this programme is to expand the catch of non-quota fish and shellfish and to ensure fully the uptake of white fish within quota constraints.

In line with Council Regulation (EEC) No 4028/86, the multiannual guidance programme for Ireland for the evolution of the fishing fleet has established objectives in terms of engine power and vessel tonnage for the reduction of the capacity of the fishing fleet. The Irish authorities are currently meeting these objectives.

Breakdown of landings from 1984 to 1988

(in 1 000 tonnes)

Species	1984	1985	1986	1987	1988
Demersal	40	44	36	45	44
Pelagic	139	155	162	167	180
Shellfish	24	23	25	26	23
Total	203	222	223	238	247

Whereas the supply of some species has remained relatively constant over the period, the total landings have increased. The main increase in landing has been in respect of pelagic species particularly through increased fishing of horse-mackerel and herring. More recently there has been some concentration on other underutilized non-quota species, for example argentines. In terms of catch by ICES area, over 60% of total catch comes from ICES VI and is landed into the main port at Killybegs.

1.3. Aquaculture

The aquaculture industry has expanded rapidly from negligible beginnings at the start of the decade with output expected to increase further by over 300% by 1995. The Irish Government has identified two priority species for growth, salmonoids and shellfish. Total employment in the aquaculture industry is estimated at 2 000 people, 900 of whom are engaged in full-time employment, 1 100 in part-time employment. The largest increase in the value of aquaculture output was produced by the increased growth of the high-value species, Atlantic salmon (1980 — IRL 73 000; 1989 — IRL 23 300 000). However, mussel culture has realized the greatest growth in tonnage (1980 — 4 732 tonnes; 1989 — 11 700 tonnes). Ireland's geographical position provides suitably sheltered waters and pure water supplies to develop further the aquaculture industry and its growth provides an opportunity to increase supplies of raw material to the processing sector.

Environmental protection is given a high priority by the Irish Government and strict measures are imposed on the aquaculture industry to avoid pollution.

1.4. Processing and marketing

1.4.1. Processing

The fish-processing and marketing industry in Ireland provides employment for an estimated 3 500 full- and part-time workers. The relationship between the employment in the catching sector and the processing sector is low, less than one processing job for two fishermen. In other Member States this relationship is closer to 1:1, thus reflecting a relatively underdeveloped processing sector in Ireland with, in general, a low level of processing activity.

The industry comprises 120 firms; however, a significant proportion of these (estimated at 40) are small businesses engaged mainly in wholesale/retail activities. Of the total number of businesses, the top 25% (30 businesses) account for an estimated 70% of total output. There is a need in Ireland to develop further these and other businesses to such a size as to enable them to effectively compete at an international level and to process further the available raw material supplies, particularly in pelagic species.

In 1988 the total catch was 240 000 tonnes, of which 189 000 tonnes largely comprised mackerel and was sold in unprocessed or semiprocessed product form as whole fresh or frozen.

The fish-processing industry is also characterized by a large number of small firms which are geographically dispersed, leading to fragmentation within the industry and a lack of scale. In addition, there are a large number of small-scale firms engaged in the production of smoked salmon. Increased competition in this market and the international trend towards efficient volume-orientated production units will require investments in technology to provide efficient production techniques: joint marketing between small firms and cooperation with large firms will also be required to gain increased access to expanding international markets.

There has been movement within the industry to develop new products and markets particularly in herring, for example herring roe. However, low-cost raw materials imported into the Community have resulted in the herring-processing industry facing increased competition, particularly in the primary processing sector.

Mackerel supplies are, in the main, exported in whole frozen form, but there is an increasing production of value-added products from this species particularly for fillet and other product forms. The volatility of some oversesas markets in whole frozen form creates uncertainty and marketing difficulties for processors. A steady market exists at present for fresh and semiprocessed material for smoking and final processing in other Member States. In addition, other species such as horse mackerel have been processed and a market for these species developed in Japan for high specification quality products.

Prime shellfish products, such as lobster, have the highest value in a fresh live form; however, there is considerable added value processing activity using other shellfish. There is also an increasing international market for farmed species such as mussels and oysters.

1.4.2. Marketing

In Ireland there are approximately 50 auctions per week held at the 12 auction centres spread throughout the coastline. The largest port is located at Killybegs on Ireland's north-western coast. Nearly all seafish landed in Ireland are offered for sale through the auction system initially. Not all of the auction centres have even basic facilities and many require the provision or upgrading of auction halls. The relatively recent developments of the Irish fleet and the fish-processing industry have put increasing pressure on auction halls and investment is required to provide efficient handling, storage and marketing facilities for fishery products together with improvements in the quality and hygiene conditions in auction halls. Five centres at Killybegs, Rossaveal, Castletownbere, Dunmore East and Howth have been identified by the Irish authorities as priority centres for investment. Similar types of facilities are required at a number of other smaller ports along the coastline including the improvement of handling facilities for aquaculture and shellfish products, particularly in relation to quality and hygiene.

1.4.3. Conclusion

The principal conclusions arising from the examination of the Irish fish-processing and marketing industry are as follows:

Strengths

(a) The close proximity to sources of good quality raw material capable of supplying a developing fish-processing industry;

(b) a fast-growing aquaculture industry with potential for further expansion and processing;

(c) an available workforce which can be trained and integrated quickly into the industry dispersed along the coastline.

Weaknesses

(a) The processing sector in Ireland is not well advanced in its development;

(b) the lack of adequate investment in equipment and buildings within the processing industry;

(c) the lack of adequate investment in upgrading facilities related to quality and hygiene conditions;

(d) the distance from principal markets;

(e) a heavy dependence on relatively lower value pelagic species;

(f) the need to increase value-added activity, particularly in pelagic species;

(g) the lack of scale in individual businesses together with a large number of small firms;

(h) the lack of capital investment in auction halls and handling facilities;

(i) the difficulties of further development of processing in the demersal sector due to the shortage of white fish supplies;

(j) a small home market (low consumption per head).

2. Priority axes for common action

2.1. Priority axes

Based upon the strengths and weaknesses of the sector, the Commission and the Irish authorities have agreed within the framework of partnership the following priority axes for granting Community aid.

The two axes are as follows:

Axis 1: Processing;

Axis 2: Marketing.

2.1.1. Axis 1: Processing

Measure 1: Better utilization of raw materials

Raw material supplies in Ireland have increased considerably over the period 1984-88, mainly in respect of pelagic species. Since most processing is of a limited form this measure will be implemented for all species by cofinancing buildings and equipment for:

(a) the processing of species exported as fresh and whole fish to maximize value and employment in Ireland within both the primary and secondary processing sectors;

(b) the provision of increased processing capacity to utilize species where processing capacity may be insufficient to fully utilize resources and to provide capacity for presently under-exploited and non-quota species;

(c) the utilization of available raw materials to maximize their value by developing new products, new packaging, new markets and secondary processing of primary products;

(d) the processing of aquaculture products and/or the encouragement of integrated aquaculture and processing capacity.

Measure 2: Upgrading and modernization of existing processing facilities and development of new processing facilities

Investments will be required in buildings and equipment in both the primary and secondary processing sectors in order to:

(i) meet the requirements of customers;

(ii) effectively compete in the internal market;

(iii) meet the requirements of the new Community hygiene and health regulation.

It will be necessary for processors to demonstrate their ability to secure supplies for raw materials as well as markets. This measure includes Community aid for:

(a) the development of processing businesses to a size that will enable them to compete effectively at an international level and the development of some small firms to cater for specific markets;

(b) investments in facilities which will improve quality and hygiene and assist companies with developing in an efficient and planned manner. The investments will assist progressive companies to meet increasing consumer demand for quality and hygiene and/or enable these companies to develop new markets including opportunities offered by the single internal market;

(c) the introduction of production technology to improve the competitiveness of progressive companies within all sectors of the processing industry.

Measure 3: Pilot/demonstration projects: technical assistance and studies

Where investments involve pilot/demonstration projects, technical assistance and studies will be carried out to support the processing axis.

2.1.2. Axis 2: Marketing

There is a need for Ireland to upgrade, modernize and develop its auction hall and fish-handling facilities, including those related to aquaculture.

Measure 1: Auction halls

Investments are necessary to ensure the efficient handling, storage and marketing of fishery products through auction halls, especially in relation to quality and hygiene.

Measure 2: Aquaculture and handling/purification facilities

Investments are necessary in the handling of fishery products in the aquaculture sector, especially in relation to quality and hygiene.

Measure 3: Pilot/demonstration projects: technical assistance and studies

Where investments involve pilot/demonstration projects, technical assistance and studies will be carried out to support the marketing axis.

2.2. Coordination with other Community aid

2.2.1. Common fisheries policy (CFP)

The actions foreseen in this Community support framework must conform with the objectives of the common fisheries policy. The implementation of this policy consists of measures with a view to speeding up the adjustment of fisheries and aquaculture structures which include:

(a) Regulation (EEC) No 4028/86 on Community measures to improve and adapt structures in the fisheries and aquaculture sector;

(b) Regulation (EEC) No 3252/87 concerning the coordination and promotion of research in the fisheries and aquaculture sector.

The coherence between the actions foreseen in this Community support framework and the above measures will be ensured during their examination and implementation.

In the implementation of Regulation (EEC) No 2321/88, setting out application procedures for .Community aid under Regulation (EEC) No 4028/86 concerning fishing-port facilities, Ireland has presented a specific programme which was adopted by a Commission Decision on 29 June 1990.[1]

2.2.2. Other objectives of the reform of the structural Funds

As part of the reform of the structural Funds, other Community support frameworks under Objectives 1, 2, 3 and 4 have been adopted. In order to ensure economic and social cohesion priority will be given, where appropriate, to actions within this Community support framework which complement and integrate with other Community support frameworks.

[1] OJ L 180, 13.7.1990.

3. Forms of intervention

3.1. Forms of assistance

According to Regulation (EEC) No 4042/89 the Community intervention will take one or several of the following forms:

(a) operational programmes;

(b) global grants;

(c) suitable projects;

(d) pilot/demonstration projects: technical assistance and studies.

Operational programmes will be the main form of assistance.

3.2. Rates of finance

Ireland being totally covered by Objective 1 of the reform of the structural Funds, the grant rate for financing all forms of assistance will be up to 50% of the eligible costs.

4. Indicative financing plan

The amounts shown in the Community support framework financing tables are those agreed between the Commission and the Irish Government. The figures relate to the period 1991-93. The tables contain commitments made under the European Agricultural Guidance and Guarantee Fund (EAGGF) — Guidance Section part of the structural Funds and are in line with Objective 5a of the reform of the structural Funds and also with Regulation (EEC) No 4042/89 for the improvement of conditions under which fishery and aquaculture products are processed and marketed.

The indicative financing plan expressed in ecus at 1991 prices is presented in the form of two tables:

Table 1 shows funding by priority axis;
Table 2 shows funding by year.

European Investment Bank

Concerning the possible participation of the EIB, the loan packages are not estimated at this stage; the actual amounts of loans being dependent on the projects to be submitted by the promoters with the consent of the national authorities concerned and the approval of the EIB organs.

Whenever appropriate, the EIB is prepared to approve, on the basis of its customary criteria, applications for loans for eligible investments not provided for in the Community support framework.

Table 1

Indicative financing plan by priority axis and existing commitments (1991-93)

at 1991 prices

(ECU 1 000)

Priority axes	Total cost[1]	Public expenditure										Private sector	Community loans EIB[3]
		Total public expenditure	Community grants				National contribution[2]						
			Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authorities	Other			
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10		11	12
New actions													
1. Processing	30 000	14 000	8 000	8 000	—	—	6 000	6 000	—	—		16 000	
2. Marketing	8 000	3 600	2 000	2 000	—	—	1 600	1 600	—	—		4 400	
New actions Subtotal	38 000	17 600	10 000	10 000	—	—	7 600	7 600	—	—		20 400	t.e.
Existing commitments t.e.	—	—	—	—	—	—	—	—	—	—		—	
Existing commitments Subtotal	—	—	—	—	—	—	—	—	—	—		—	—
Total	38 000	17 600	10 000	10 000	—	—	7 600	7 600	—	—		20 400	t.e.

1 Only including investments which are planned for cofinancing under this Community support framework.
2 Breakdown between State/region/other will be decided later.
3 Participation of the EIB will be decided later.
t.e. = token entry.

Table 2

Indicative financing plan
by year (1991-93)

at 1991 prices

(ECU 1000)

	Total cost[1]	Public expenditure									Private sector	Community loans EIB[3]
		Total public expenditure	Community grants				National contribution[2]					
			Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authorities	Other		
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10	11	12
1991	11 400	5 280	3 000	3 000	—	—	2 280	2 280	—	—	6 120	
1992	14 060	6 512	3 700	3 700	—	—	2 812	2 812	—	—	7 548	
1993	12 540	5 808	3 300	3 300	—	—	2 508	2 508	—	—	6 732	
Total	38 000	17 600	10 000	10 000	—	—	7 600	7 600	—	—	20 400	(t.e.)

1 Only including investments which are planned for cofinancing under this Community support framework.
2 Breakdown between State/Region/other will be decided later.
3 Participation of the EIB will be decided later.
t.e. = token entry

European Communities — Commission

Community support framework — 1991-93

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Luxembourg: Office for Official Publications of the European Communities

1992 — 21 pp. — 21.0 x 29.7 cm

ISBN 92-826-3967-3

Price (excluding VAT) in Luxembourg: ECU 6

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Price (excluding VAT) in Luxembourg: ECU 6

ISBN 92-826-3967-3

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