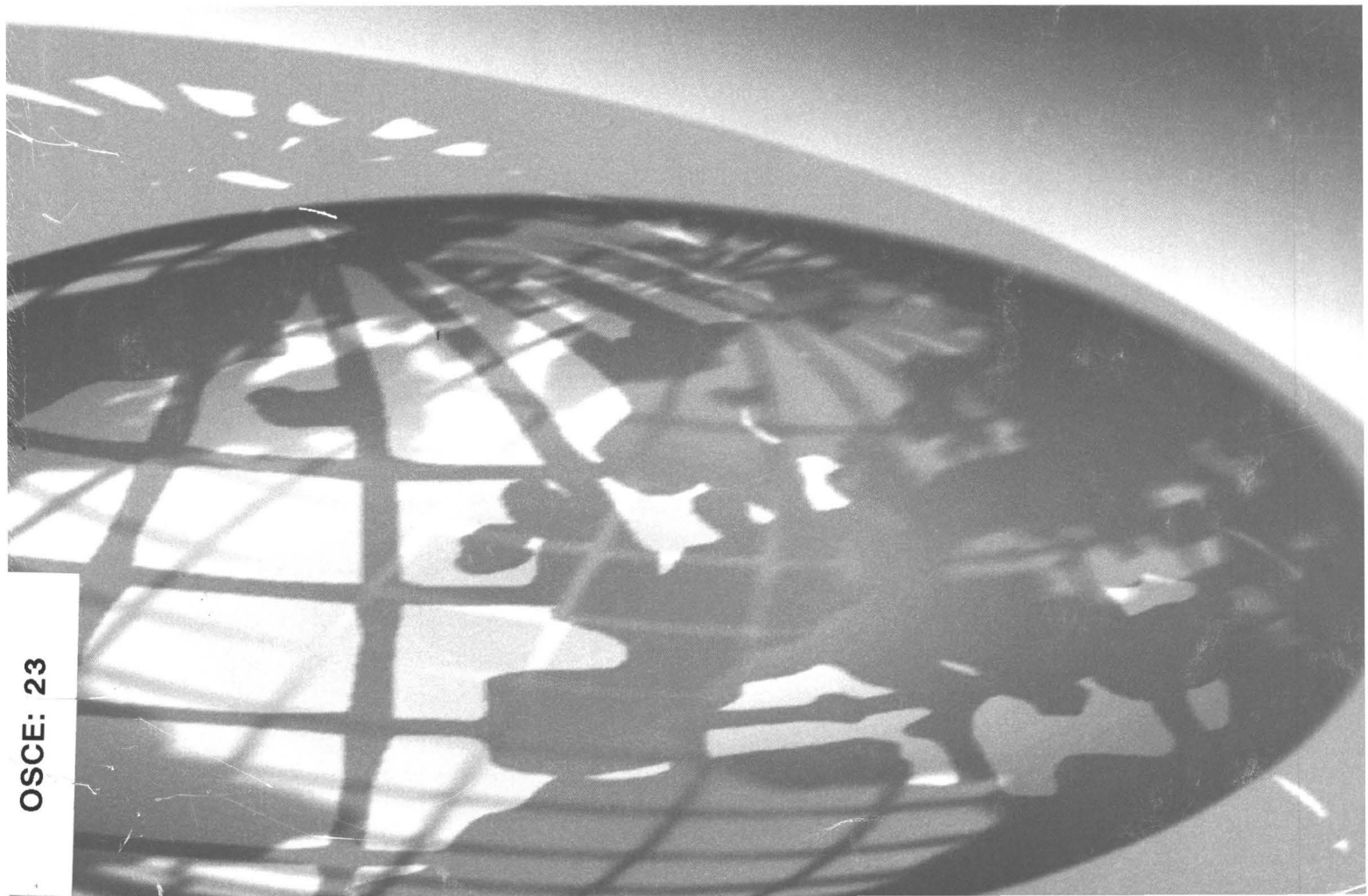




The CIS & EU Facts and Figures 1995



Interstate Statistical Committee of the Commonwealth of Independent States

The Interstate Committee is the official body responsible for disseminating statistical information on socio-economic developments in CIS countries. Its activities cover methodology, collection and analysis of statistical information, publications, data bases, seminars, and other forms of assistance to national statistical offices to facilitate transition to a market economy by producing statistics to international standards.

The primary users of the data are the Heads of State and Government, the Inter-Parliamentary Assembly, the Executive Secretariat, the Interstate Committee for the Economic Union, and other coordinating bodies of the CIS. Other significant users include ministries, international organizations, private companies, research organizations, and the general public.

The Committee offers its users different kinds of publications such as weekly bulletins, quarterly short-term economic indicators on CIS countries, and various yearbooks: *Economy of the CIS*, *External Trade of the CIS*, *Demographic Yearbook*, *Labour Market of the CIS*, *Financial Statistics of CIS Countries*, *National Accounts and Economic Balances of CIS countries*, *Environment in the CIS*, *World in Figures*.

The Committee's computerized database *Statistics* contains about 4 000 tables with monthly, quarterly and annual data on the main socio-economic indicators of the CIS countries since 1980. A CD-ROM is also under preparation and will be disseminated by January 1996; it will contain more than 3 500 statistical indicators on CIS countries.

Address:

Information and Publishing Department of the Interstate Statistical Committee of the CIS, 39, Myasnitskaya Street, 103450 Moscow, Russian Federation

Tel.: 7-095-207 42 37/Fax.: 7-095-207 45 92

E-mail: statpro @ sovam.com

Statistical Office of the European Committee — Eurostat

Eurostat, the Statistical Office of the European Communities, was established in 1953 and is based in Luxembourg. Originally, its task was to meet the requirements of the European Coal and Steel Community (ECSC) before its mandate was broadened to serve the European Economic Community (EEC) and the European Atomic Energy Community (EURATOM), when they were formed in 1958.

Eurostat is a Directorate-General of the Commission of the European Communities in Brussels. Its primary role is to provide EU institutions with data allowing comparative analysis among the 15 Member States. Other important users are public bodies in the Member States, private and public enterprises, research institutes and universities, the media and the general public.

Eurostat's main task is to propose common standards (e.g. classifications, definition of statistical units), methods, and operational systems for obtaining comparable information across the Union. It fosters cooperation between the Member States Offices to promote a coherent European Statistical System (ESS) as a prerequisite for EU policy formation. Eurostat also works very closely with international organizations, the United States, Canada and Japan to coordinate statistical systems. Recently, cooperation with central and eastern Europe and the CIS has been intensified to accelerate the integration of these countries into the world statistical community.

Eurostat receives statistical data from the Member States. The data are verified, harmonized and tabulated at EU level, stored and disseminated to a broad public. In some but not all cases, Eurostat drafts legal acts (directives, regulations, decisions, recommendations) for the Council's consideration to make sure that essential statistics become available.

Eurostat publishes statistical information at EU level covering different themes such as economy and finance, social conditions, agriculture, energy, industry, external trade, and environment. Eurostat also disseminates data through electronic products (e.g. diskettes, CD-ROM) and the access for users to data bases (e.g. CRONOS for macroeconomic data, COMEXT for foreign trade statistics, REGIO for regional information).

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The CIS & EU Facts and Figures 1995



The CIS & EU — Facts and Figures 1995

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The analysis and views are those of the authors and not necessarily those of either Eurostat and the European Commission or the Interstate Statistical Committee of the CIS.

Thanks are also owed to all the experts of the Interstate Committee of the CIS and Eurostat whose names have not been mentioned individually, but who provided valuable input for this project.

This project is financed by the European Union's Tacis Programme, which provides grant finance for know-how to foster the development of market economies and democratic societies in the New Independent States and in Mongolia.

Luxembourg: Office for Official Publications of the European Communities, 1995.

N° Catalogue: CA-93-95-007-EN-C

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Foreword

Since its latest enlargement on 1 January 1995, the European Union (EU) shares a common border with the Commonwealth of Independent States (CIS), which was formed on 8 December 1991. The CIS is now made of 12 independent states, which were formerly republics of the Soviet Union.

Within only four years, the EU has become the most important trading partner of the CIS. About 50% of the CIS foreign trade (exports and imports) in 1994 was transacted with the EU. Foreign investment by the EU in the CIS stood at about ECU 4 billion at the end of 1994 and it continues to grow.

In 1991 the EU launched a programme on technical assistance to the countries of the CIS (the Tacis programme) to support the transition towards a free market economy. By the end of 1995, the EU will have allocated ECU 2.5 billion to different programmes in sectors such as infrastructure, energy, and human resources development in the CIS. The EU has already signed Partnership and Cooperation Agreements with several CIS countries to promote free trade and to intensify cultural and economic exchange. Statistical cooperation is an important component of Tacis and it is considered fundamental to the transition process.

The present publication is the direct result of such cooperation between the Interstate Statistical Committee of the CIS and the Statistical Office of the European Communities (Eurostat) under the Tacis programme. This comparative statistical overview and analysis of the socio-economic situation in the 12 CIS and 15 EU countries is based on more than 200 statistical indicators. Information on structure and trends is presented for a range of topics: population, GDP, consumer prices, employment, agricultural and forest resources, industrial output, energy, retail trade, transport, foreign trade, health, education and the environment.

The publication is essential reading for officials, managers, and economic analysts interested in comparative data on the two economic areas. The 1995 edition appears in English and Russian. We gratefully acknowledge the valuable contribution of all specialists who participated in this joint effort.



Michael Korolev, Chairman
*Interstate Statistical Committee
of the CIS*



Yves Franchet, Director-General
*Statistical Office of the European Communities —
Eurostat*

General Remarks

● *CIS and EU: Vital Facts and Figures 1995* is the first publication that offers comparative information on the Commonwealth of Independent States (CIS) and the European Union (EU). Data is presented up to 1993 and 1994. However, the most recent political developments in the EU were taken into account and information is provided, whenever possible, on all of today's 15 Member States, including Austria, Finland, and Sweden, which joined the Union on 1st January 1995. All tables therefore offer an overview of socio-economic conditions and developments in 27 countries (12 CIS and 15 EU Member States).

● In recent years, CIS member countries have started adopting international norms and standards for data collection. Most figures presented here are based on common methodology and can therefore be compared for the 27 countries. Any major differences in methodology are explained in the footnotes to the tables.

● Most statistics were collected from the national statistical services of the countries of the CIS and EU. Their addresses

are included in Annex 2, for further information. The main indicators contained in this study are sent, on an annual basis, by the national offices to the Interstate Statistical Office of the CIS and to the Statistical Office of the European Communities (Eurostat).

● For certain variables, information was also provided by other international organizations such as Food and Agriculture Organization (agricultural and forestry data), International Telecommunications Union (telephone lines, long-distance calls), UN Economic Commission for Europe (electricity consumption), UN Education, Science and Culture Organization (data on education), and World Health Organization (health statistics).

● When data were not directly available, important aggregates have been estimated to allow inter-regional comparisons between the CIS and EU.

● The ECU, Russian rouble, and US dollar exchange rates used in this publication are given in Annex 1.

List of Abbreviations and Acronyms

CIS: Commonwealth of Independent States
EU: European Union
BLEU: Belgo-Luxembourg Economic Union

Ecu: European Currency Unit
Rbl: Russian rouble
US\$: US dollar

bn: billion
mn: million
t: ton
km²: square kilometre

km: kilometre
m³: cubic metre
m²: square metre
m: metre
ha: hectar
kWh: kilowatt hour
°C: degree Celsius

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Chapter 1

CIS and EU in the World

Key Facts (1993)	CIS 12	EUR 15
Territory (mn km ²)	22.2	3.2
Population (mn)	285	370
Utilized agricultural area (mn ha)	525	138
Forest area ¹ (mn ha)	808	97
Grain production (mn t)	183	178
Cattle (mn head)	98	84
Steel (mn t)	98	144
Passenger cars (mn)	1	11
Crude oil (mn t)	402	117
Coal ² (mn t)	539	185
Natural gas (bn m ³)	765	201
Electricity generation (bn kWh)	1 433	2 109

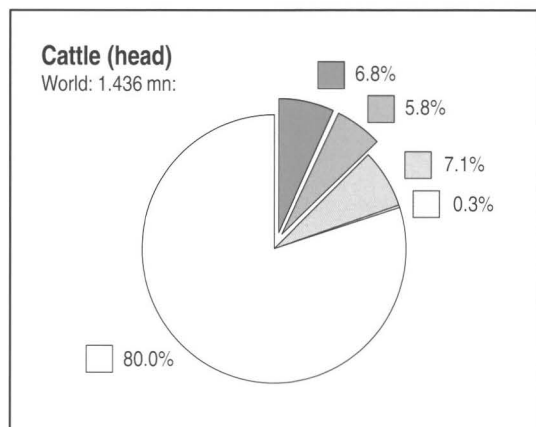
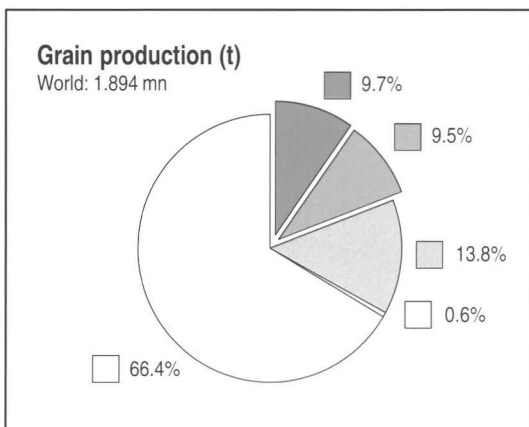
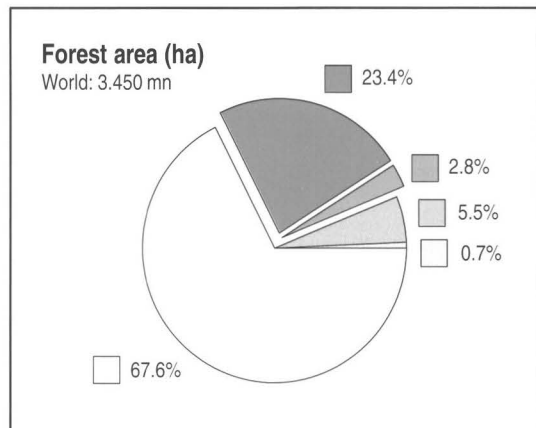
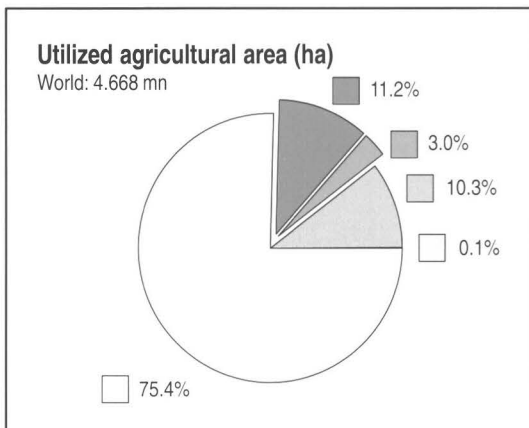
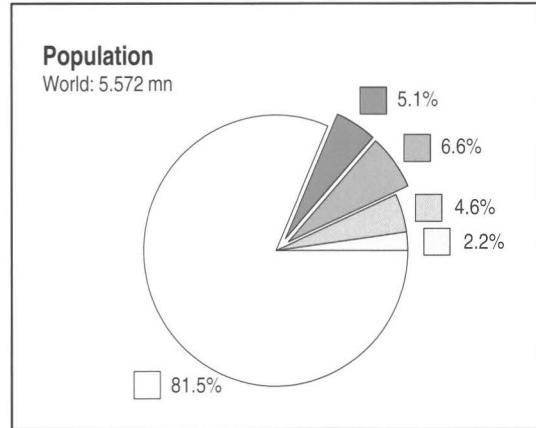
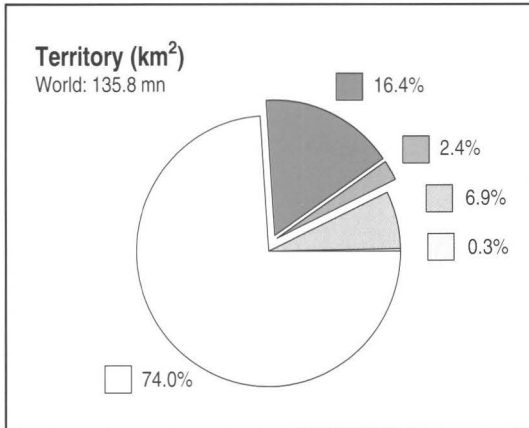
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2. CIS 12: excluding Georgia; EUR 15: 1992.

1. CIS and EU in the World

1993

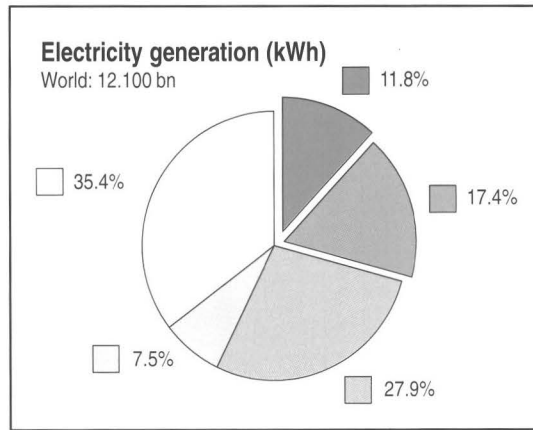
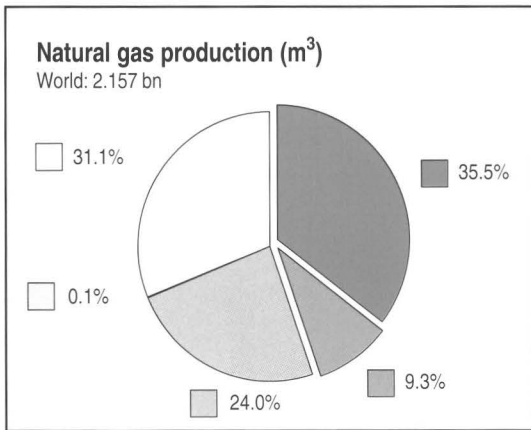
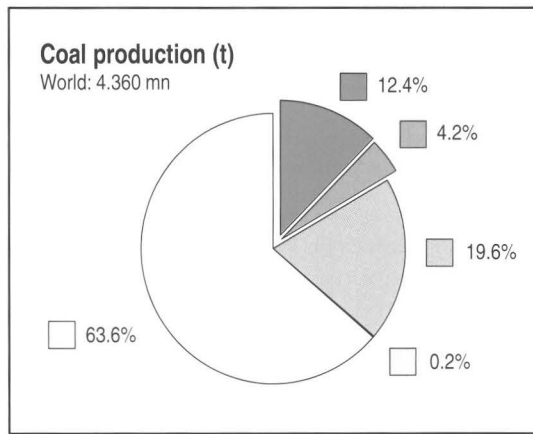
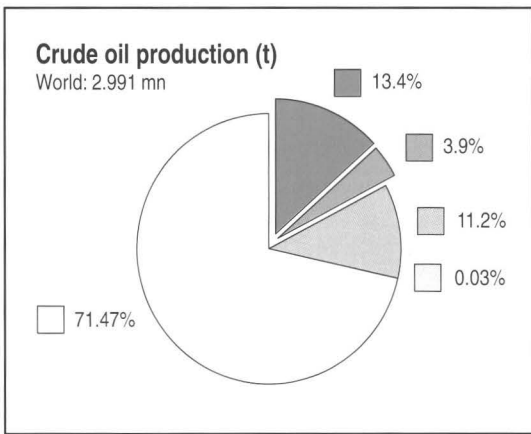
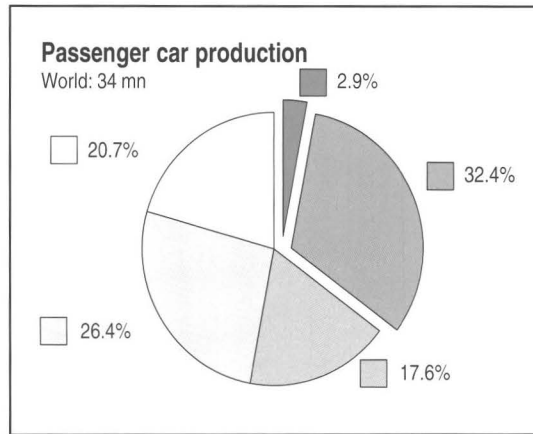
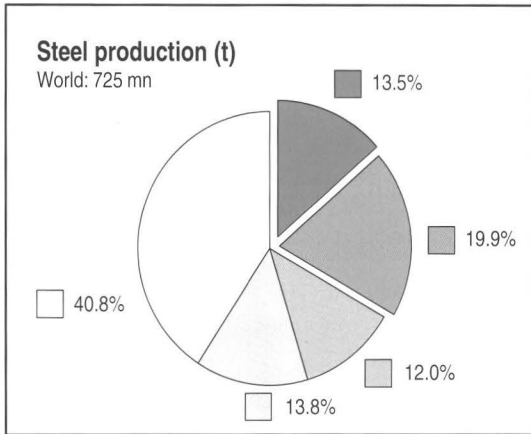
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1. CIS and EU in the World

1993

■ CIS 12 ■ EUR 15 ■ USA □ Japan □ Rest of the World



CIS and EU: Origins and Institutions

2.1. The CIS and Its Institutions

2.1.1. Milestones in the Establishment of the CIS

2.1.2. Main CIS Institutions

- CIS Council of Heads of State
- CIS Council of Heads of Government
- CIS Special Councils
- CIS Executive Secretariat
- CIS Inter-Parliamentary Assembly
- CIS Interstate Committee for the Economic Union
- CIS Economic Court
- CIS Interstate Bank
- CIS Interstate Currency Committee
- CIS Interstate Statistical Committee

2.2. The EU and Its Institutions

2.2.1. A Deeper and Larger Union at the Service of its Citizens

2.2.2. Decision-making, Budget and Policy Areas

2.2.3. Main EU Institutions

- Council of the European Union
- European Parliament
- European Commission
- Court of Justice of the European Communities
- European Court of Auditors

2.1 The CIS and Its Institutions

2.1.1 Milestones in the Establishment of the CIS

Fifteen sovereign states were formed out of the territory of the former Soviet Union following its disintegration in 1991. Drawing on close historical ties, the Heads of State of the Republics of Belarus, Russia, and Ukraine signed, on 8 December 1991, the Agreement on the Creation of the Commonwealth of Independent States (CIS) in Belarus.

About 2 weeks later, on 21 December 1991, the Heads of State of 11 countries (Armenia, Azerbaijan, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan) met in Almaty, Kazakhstan, to sign—as High Contracting Parties—a Protocol to the Agreement, and in this way constituted the CIS. The Agreement establishing the CIS then came into force following ratification by the national parliaments.

At the summit in Almaty, the signatories also agreed to establish the Council of Heads of State as the supreme institution of the CIS, and the Council of Heads of Government. At this meeting, the Heads of State signed a Declaration affirming the principles of equal rights throughout the Commonwealth and of close cooperation in developing a common economic space encompassing the European and the Asian parts of the CIS. The 11 countries also agreed to respect the international obligations of the former Soviet Union.

Georgia announced its decision to join as the twelfth member state on 9 December 1993. Its Parliament ratified the Accession Agreement on 1 March 1994.

According to the statutes, the Commonwealth has no supranational powers but is based on the principle of equal sovereignty of its members, which remain independent subjects of international law enjoying equal rights. The Commonwealth aims to develop and to consolidate friendship, good neighbourly relations, harmony and confidence between nations, mutual benefit and understanding among its members.

In accordance with their obligations, the CIS member states agreed to undertake, as part of their statutory obligations and through bilateral and multilateral agreement, joint action in the following spheres:

- respect of human rights
- coordination of foreign policy issues
- cooperation in launching a common economic space and customs policy
- development of joint transport and communications policies
- implementation of healthcare and environment policies
- coordination of social and immigration policies
- fight against organized crime
- definition of a common defence policy and protection of external borders

At a summit meeting in Moscow on 24 September 1993, the Heads of State of 9 member countries signed the Treaty on the Creation of an Economic Union. The objective was to establish a common economic space, to encourage the implementation of the needed economic reforms, and to strengthen the process of integration within

2.1. The CIS and Its Institutions

the CIS. Georgia and Turkmenistan joined the Economic Union on 9 and 24 December 1993, respectively, and Ukraine as an associated member on 15 April 1994.

The Treaty was the first document to present a concept for building a new system of economic relations between the CIS countries. It also contains a long-term strategy for joint action on the basis of mutual respect of the sovereignty and laws of each country. The Treaty sets the programme for stable economic development, including the creation of customs and currency unions, and a common market for goods, services, capital, and manpower.

The Councils of Heads of State and Government also adopted a series of other documents on economic integration. The main documents concern investment activities, antitrust policies, a free trade area, common support mechanisms to develop links between industrial enterprises belonging to different sectors, and assistance in developing transnational organizations in the field of commerce, finance, and insurance.

The Heads of State and Government also signed several documents on stabilizing living standards of citizens, including cooperation in the effective deployment and social protection of migrants and guarantee of citizens' rights (e.g. payment of allowances and compensation for family members).

Decisions for the strengthening of the legal, economic, and organizational foundations of the CIS and for the creation of an economic union are contained in key documents such as the Memorandum on Basic Orientations for Integration in the Commonwealth of Independent States and the Long-term Plan for Integration. These

documents were signed by the Heads of State on 21 October 1994. The documents set out the steps towards transformation in an effective union of sovereign states: customs and currency unions, free movement of people, goods, services, and capital, scientific and technical cooperation.

2.1.2 Main CIS Institutions

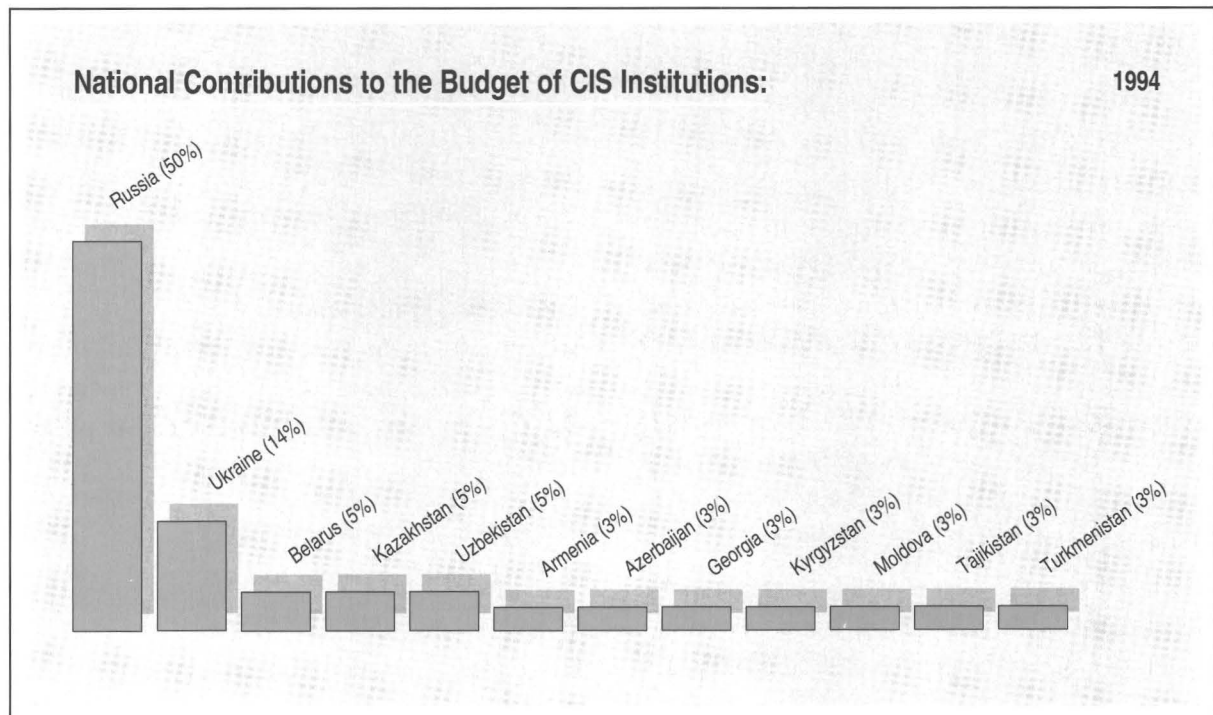
Special institutions have been created to support and coordinate the process of integration between the CIS member states. The most important institutions are:

- Council of Heads of State
- Council of Heads of Government
- Council of Foreign Ministers
- Council of Defence Ministers
- Council of Commanders-in-Chief of Frontier Troops
- Council of Collective Security
- Executive Secretariat
- Inter-Parliamentary Assembly
- Economic Court
- Human Rights Commission
- Interstate Committee for the Economic Union
- Interstate Statistical Committee

The statutes of the CIS also provide for the creation of specialized bodies on the basis of individual agreements of the member countries. About 40 such bodies operate already in various economic, social, and other fields.

The operations of CIS coordinating institutions are financed according to the Decision of the Heads of Government adopted on 9 September 1994. The contribution of each state is determined by its economic potential.

2.1. The CIS and Its Institutions



■ *CIS Councils of Heads of State and Government*

The **Council of Heads of State** is the supreme body of the CIS. It meets at least twice a year to discuss basic issues and to provide guidelines for joint action in spheres of common interest.

The **Council of Heads of Government** is responsible for coordinating cooperation between the executive authorities (especially ministries) of the CIS member states in economic, social, and other spheres of common interest. This Council meets at least once in three months.

In both Councils, decisions are adopted by unanimity.

■ *CIS Special Councils*

The Statutes of the CIS also provide for the following specialized councils:

- **Council of Foreign Ministers**, which coordinates foreign policy activities of the member states including those concerning international organizations
- **Council of Defence Ministers**, which is responsible for coordinating defence and military policies
- **Council of Commanders-in-Chief of Frontier Troops**, which are responsible for guarding and securing the external borders of the CIS
- **Council of Collective Security**, which coordinates joint action under the Agreement on Collective Security of 15 May 1992

2.1. The CIS and Its Institutions

■ *CIS Executive Secretariat*

The Executive Secretariat was created on 14 May 1993 and is based in Minsk, Belarus. The Secretariat is a permanent statutory body, which is responsible for preparing and conducting the meetings, and implementing the decisions of the Councils of Heads of State and Government. It also ensures the coordination between other CIS bodies.

One of its main tasks is to prepare draft agreements, decisions, and agendas for the meetings of the Councils of Heads of State and Government. The Secretariat also carries out legal studies and other research, and gives opinions on documents.

The Secretariat provides the administrative structure for the Permanent Representatives, who serve as a link between their respective governments and the CIS bodies. In addition, member countries can second their own officials for senior posts on the basis of national quotas.

The Secretariat is headed by the Executive Secretary of the CIS, who directs its activities and represents the CIS in negotiations with international organizations.

■ *CIS Inter-Parliamentary Assembly*

This body was created in Almaty, Kazakhstan, on 27 March 1992 at a consultative meeting of the Presidents of the Supreme Soviets (Parliaments) of the Republics of Armenia, Belarus, Kazakhstan, Kyrgyzstan, Russian Federation, Tajikistan, and Uzbekistan. Today, the Inter-Parliamentary Assembly also includes members of parliament from the Republics of Azerbaijan, Georgia and Moldova. Ukraine has observer status.

The Assembly was created as a consultative body, whose mandate is to discuss political and socioeconomic questions, to examine issues of parliamentary cooperation, and to submit proposals to the national parliaments. The Assembly is made up of delegations from the member countries. Each delegation enjoys equal status and has a single vote. Decisions are taken by consensus.

The Assembly holds regular plenary sessions at least twice a year. For the Assembly to be convened, a quorum of two-thirds of national delegations is required. The Assembly's work is organized by the Assembly Council, which is made up of the heads of delegations. Its members elect a President for a one-year term through secret ballot. Standing and ad hoc committees are appointed to conduct preliminary studies, to prepare questions, and to draft resolutions, which are submitted at the plenary session of the Assembly and its Council. The committees meet not less than once every quarter.

Standing Assembly committees have been created in the following areas:

- legal issues
- economy and finance
- social policy and human rights
- environment
- defence and security
- culture, science, education, and information
- foreign policy
- budgetary control

A Secretariat was created, as a permanent working body, to organize the work of the Assembly, its Council and its committees; it is headed by a General Secretary. The Secretariat is based in St. Petersburg.

■ *CIS Economic Court*

The Economic Court is based in Minsk. It was created with the objective of monitoring the correct application by the member countries of the CIS agreements.

The Court is governed by the statutes approved by the Council of Heads of State on 6 July 1992. Its jurisdiction consists in ensuring that economic obligations are fulfilled and disputes settled within the Commonwealth.

Generally, the states concerned bring the issue before the Court through their plenipotentiary bodies. The Court then passes judgement and determines corrective measures, which it recommends the litigant states to observe. Each country appoints two independent judges, who enjoy immunity.

■ *Human Rights Commission*

The Human Rights Commission is a consultative body, based in Minsk, which is governed by the statutes approved by the Heads of State on 24 September 1993. The Commission ensures that each member country fulfils its human rights obligations.

The precise position of each member country concerning these obligations is laid down in the Human Rights Convention of the CIS of 26 May 1995. The Convention confers a broad-based mandate to the Commission.

■ *CIS Interstate Committee for the Economic Union*

This Committee was established on 21 October 1994 and is based in Moscow. It is a permanent executive and coordinating body responsible for promoting integration within the members of the Economic Union. According to the Agreement on the Creation of the Committee for the Economic Union, the Committee has monitoring and administrative functions within the limits delegated by the member states of the Economic Union. Its principal tasks are:

- to create an economic union on the basis of a payment union, a free-trade zone, a customs union, a common market for goods, services, capital and labour, and a monetary union
- to harmonize regulations for closer economic relations
- to promote enterprise development and the required infrastructure for a common market (transnational organizations, financial and industrial groups, banking and insurance firms, joint ventures)
- to find solutions to common social problems.

The Committee monitors the fulfillment of decisions adopted by the Councils of Heads of State and Government in the economic sphere.

The Committee is headed by a Presidium consisting of Deputy Heads of Government. The Chairman of the Presidium is elected for a period of one year. Between the meetings of the Presidium, its functions are carried out by a Board consisting of official representatives appointed by the member countries. The Chairman of the Board is appointed for a period of three years by the Council of Heads of State.

2.2. The CIS and Its Institutions

Interstate, intergovernmental and coordinating bodies operate under the Committee to deal with the economic, social and industry-related aspects of cooperation. The heads of these bodies have a consultative vote on Board meetings.

The Committee has its own administrative structure; it consists of various departments and is staffed by nationals of the member countries.

■ *CIS Interstate Bank*

The Interstate Bank was created on 22 January 1993; it is based in Moscow.

The Bank's Governing Board is made up of representatives of all 12 member countries. Its role is to organize and manage interstate payments between the national banks of the member states, and to coordinate monetary policies.

In accordance with the Agreement on the Creation of a Payments Union, the Interstate Bank is a specialized body of this Union.

■ *CIS Interstate Currency Committee*

The Interstate Currency Committee, which was created on 26 May 1995, supports the countries by providing loan facilities and assistance in currency and payments issues. It also strives to improve currency legislation and to coordinate the monetary policies of the countries participating in the Payments Union.

Similar to the Interstate Bank, the Committee is a coordinating body of the Payments Union. It is subordinate to the Council of Heads of State and Government, as well as to the Interstate Economic Committee.

The Currency Committee is based in Moscow.

■ *CIS Interstate Statistical Committee*

The Statistical Committee of the CIS was created through a decision of the Heads of Government of seven CIS member countries on 30 December 1991. Following this decision, the Heads of the seven national statistical offices signed, on 6 February 1992, the constituent documents for the organization of the Statistical Committee. Since then, other countries have joined the Committee: Uzbekistan (1992), Azerbaijan and Georgia (1994), Moldova and Ukraine (1995).

Following a Decision of the Council of Heads of Government of 10 February 1995, the Statistical Committee of the CIS was given the status of an interstate body and was renamed as the Interstate Statistical Committee of the CIS.

Its mandate is to develop a common statistical methodology, to provide data for multilateral agreements negotiated in all areas of interstate cooperation, and to compile comparative official statistics for the CIS. The Committee is entrusted with the task of creating and providing the statistical base for promoting the Economic Union.

The Interstate Statistical Committee is based in Moscow.

2.2 The EU and Its Institutions

2.2.1 A Deeper and Larger Union at the Service of its Citizens

When Europe's leaders began rebuilding their countries after the Second World War, they adopted political cooperation and economic integration as the only viable options for avoiding further conflict. In 1952 a Franco-German initiative led to the creation of the European Coal and Steel Community (ECSC), which was followed five years later by the European Atomic Energy Community (EURATOM) and the European Economic Community (EEC). Since 1967 the three Communities have been represented by a single Commission and Council of Ministers which, as the only executive organs, were given a clear mandate to work towards the formation of a common economic area.

Initially, the emphasis was clearly on economic integration. A customs union was established in 1968, and this was followed by the launch of the single market in 1987. Today, the Union functions as an integrated market based on free movement of people, goods, services, and capital. The range of domains for joint action at Union level was steadily extended to cover common policies for agriculture, commerce, transport, fisheries, energy, regional development, competition, and research and development. Efforts aimed at "deepening" the Union were supported through special financial commitments to promote structural development in backward regions.

European Council meetings of Heads of State or Government started in 1975. These high-level meetings laid the foundation for the single market initiative which led to the Single Act (1987) and, eventually, the Union Treaty (signed in Maastricht

in 1992) establishing a European Union based on three economic and political pillars:

- the European Community with a mandate to establish an economic and monetary union (EMU)
- a common foreign and security policy (CFSP)
- joint efforts to coordinate justice and home affairs (JHA).

Each pillar has its own mechanisms of cooperation and decisionmaking. The newly added last two pillars are to be developed on the basis of intergovernmental consensus, as the governments of the Member States did not want to delegate these policy areas to the Union. On the other hand, efforts to promote the single market, including the establishment of a monetary union with a single currency, will continue to be undertaken through a mixed system of cooperation between the Member States and the EU institutions, especially the Commission and the Parliament.

Additionally, the Union Treaty grants, under Article 8, special rights to every citizen of the Union, such as the right to participate in local elections, to be represented by any EU diplomatic mission in third countries, and to introduce petitions at the Parliament. Citizens may also apply to the Ombudsman, who is empowered to receive complaints concerning instances of maladministration in the EU institutions, with the exception of the Court of Justice.

Since its inception, the Community has accommodated new Member States that share a common history and similar political values of

2.2. The EU and Its Institutions

democracy, rule of law, and the respect of human rights. The original Community of Six was enlarged to a Community of Nine in 1973, of Ten in 1981, and of Twelve in 1986. The recent accession of Austria, Sweden, and Finland led to today's European Union of Fifteen (as of 1 January 1995).

Several new democracies of central and eastern Europe have also applied for membership. **Europe Agreements** were signed during 1991–1993 with Poland, Hungary, the Czech and Slovak Republics, Romania, and Bulgaria. At the Essen Summit in December 1994, the European Council announced that it envisaged similar agreements with Slovenia and the three Baltic states during 1995. The signatory country is thus given the opportunity to join the Union and to gain better access to the EU market, if it fulfills certain economic criteria. Concomitantly, it should transpose EU provisions and all related obligations (*acquis communautaire*) into national legislation.

In 1994 the EU also concluded **Partnership and Cooperation Agreements** with Belarus, Russia, and Ukraine, with the aim of promoting closer cooperation in a number of socioeconomic areas and of gradually removing trade barriers. Negotiations are underway with Kazakhstan, Kyrgyzstan, and Moldova for similar agreements.

The EU actively supports the reform process in the new democracies of eastern Europe through its PHARE and TACIS initiatives. During 1990–1994, ECU4.3 billion (about ECU1 billion per annum) were allocated to 12 central European countries through PHARE, and ECU1.9 billion (about ECU0.5 billion per annum) to the Commonwealth of Independent States (CIS) through TACIS.

2.2.2 Decisionmaking, Budget, and Policy Areas

Legal acts enacted by EU institutions are binding upon Member States and juridical persons residing in the Union. While the Council and the Commission were the only law-making bodies foreseen by the Treaty of Rome, the Single Act (1987) and the Union Treaty (1993) have granted more powers to the Parliament. As a rule the Commission proposes, the Council decides, and the Parliament has to be consulted. But in an increasing number of areas related to the single market, culture, and public health, the Parliament has the right to co-decide with the Council.

Proper planning and fund allocation for administrative support, institution building, and development of priority areas are needed for “deepening” and enlarging the EU. When the European integration process started in the late 1950s, a few million ECU were sufficient to finance the necessary operations. This changed today as the Union faces more responsibilities and challenges.

The estimated 1995 EU budget totals ECU76.5 billion (ECU72.3 billion in 1994) representing 1.2% of the Union's GDP (up from 0.5% in 1973). It is expected to rise to ECU95–100 billion by the turn of the century. The financial strength of the Union has been growing steadily since the 1970s. The most significant budget increase in absolute terms was almost ECU9 billion between 1992 (ECU60.5 billion) and 1993 (ECU69.2 billion).

In 1995 agriculture still absorbs almost half of the total EU budget. Social and regional policies rank second with 22%. Other priority areas are assistance to third countries, including the PHARE and TACIS programmes (6.1% of the total budget), and scientific research (3.8%).

2.2. The EU and Its Institutions

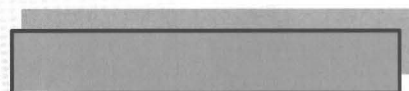
Administrative expenses represent 5% of the total budget or ECU3.8 billion. The main sources of finance for the Union are value-added tax, transfers from the Member States proportional to their GDP, customs duties and agricultural levies.

The largest contributors to the EU budget in 1994 were Germany (30.1%), France (19.2%), Italy (14.1%), and the United Kingdom (11.6%). The remaining Member States contributed between 0.2% (Luxembourg) and 8.1% (Spain).

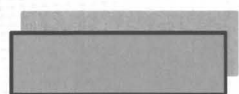
EU Budget Break-down:

1995

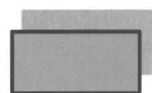
Revenue (%)



Value-added tax (51.4%)



GNP-based resource (28.4%)



Customs duties (16.9%)



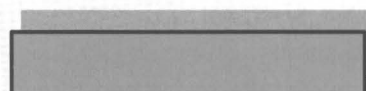
Agricultural levies (2.6%)



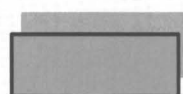
Others (0.7%)

Total: ECU 76.5 bn

Expenditure (%)



Agriculture and fisheries (46.8%)



Social and regional policy (22.1%)



Cooperation and third country assistance (6.1%)



General administration (5.0%)



Research and development (3.8%)



Other policies (16.2%)

2.2. The EU and Its Institutions

The Union Treaty defines the policy areas in which the Union intervenes to achieve deeper integration:

- Regional policy (priorities: communication, transport and energy infrastructure; support to SMEs; R&D)
- Common agricultural policy, including fisheries (Art. 38–47)
- Transport, infrastructure, and energy policy (Art. 74–84, 129)
- Competition policy (Art. 85–94)
- Economic and monetary policy (Art. 102–109)
- Common commercial policy (Art. 110–115)
- Social policy, education, vocational training and youth programmes (Art. 117–127)
- Common cultural policy (Art. 128)
- Public health (Art. 129)
- Industrial policy (Art. 130)
- Research and technological development (Art. 130f–p)
- Environment policy (Art. 130r–t)
- Cooperation with third countries (Art. 130u–y)

Historical Milestones

18 April 1951: Signing of the Treaty of Paris by six European countries for the establishment of the European Coal and Steel Community (ECSC)

25 March 1957: Signing of the Treaty of Rome for the establishment of the European Economic Community (EEC) and the European Atomic Energy Community (EURATOM)

1967: Merging of the executive organs of the three Communities (ECSC, EEC, EURATOM)

1968: Completion of the customs union and launching of the common agricultural policy (CAP)

1 January 1973: Denmark, Ireland, and the United Kingdom become members (EUR 9)

June 1979: First election of the EU Parliament by direct universal suffrage

1 January 1981: Greece becomes a member (EUR 10)

1 January 1986: Portugal and Spain become members (EUR 12)

July 1987: The Single European Act enters into force to provide the legal framework for the creation of a single market within 5 years

3 October 1990: German unification brings East Germany into the Community

1 January 1993: A single European market based on free movement of people, goods, services and capital is established

1 November 1993: The Union Treaty establishes a European Union based on a single market, policy coordination in foreign and home affairs, and EU citizenship

1 January 1994: Creation of a European Economic Area (EEA) between EU and EFTA countries; signing of the Europe Agreements with central European countries

July 1994: Signing of Cooperation and Partnership Agreements with Belarus, Russia, and Ukraine

1 January 1995: Accession of Austria, Finland, and Sweden (EUR 15)

2.2.3 Main EU Institutions

The Union is steered by common institutions to achieve the objectives laid out in the Treaty. The most important institutions are:

- Council of the European Union, represents the national governments
- European Parliament, is elected by EU citizens
- European Commission, initiates and implements legislation
- Court of Justice of the European Communities, ensures that Community law is observed
- European Court of Auditors, monitors financial management of the EU

The role and responsibilities of other institutions are also specified in the Union Treaty: Economic and Social Committee, Committee of the Regions, European Investment Bank, European Monetary Institute (predecessor of the European Central Bank to be established no later than 1999).

■ *Council of the European Union*

The Council is the Union's main decision-making body; it takes all strategic decisions pertaining to economic and political integration (Art. 145–154). It functions at two levels:

- The **European Council** of the Heads of State is the supreme body in the EU. It sets the overall orientation and direction, particularly for monetary union, foreign and defence policy, internal security, and enlargement. Since 1975, meetings have been organized at least twice a year to ensure political cooperation at the

highest level. The ministers of foreign affairs and a representative of the Commission also participate in the discussions. The Commission is then instructed to translate defined guidelines into Union decisions, regulations, and directives according to the procedures laid down in the Treaty.

- The **Council of Ministers** coordinates general economic policies and the two intergovernmental pillars (foreign and security policies; justice and home affairs). It confers to the Commission the necessary powers for implementing legal acts. General Council meetings are attended by the ministers of foreign affairs, whereas specialized Council meetings are attended only by the ministers concerned (e.g. agriculture, economy, industry). There is always a representative of the Commission. The Council meets regularly, either in Brussels or Luxembourg. The Presidency of the Council rotates among the Member States for a period of six months.

The Council is assisted by the **Committee of Permanent Representatives (COREPER)**, which is formed by the ambassadors of all Member States and their advisers. The Secretariat of the Council employs around 2000 staff.

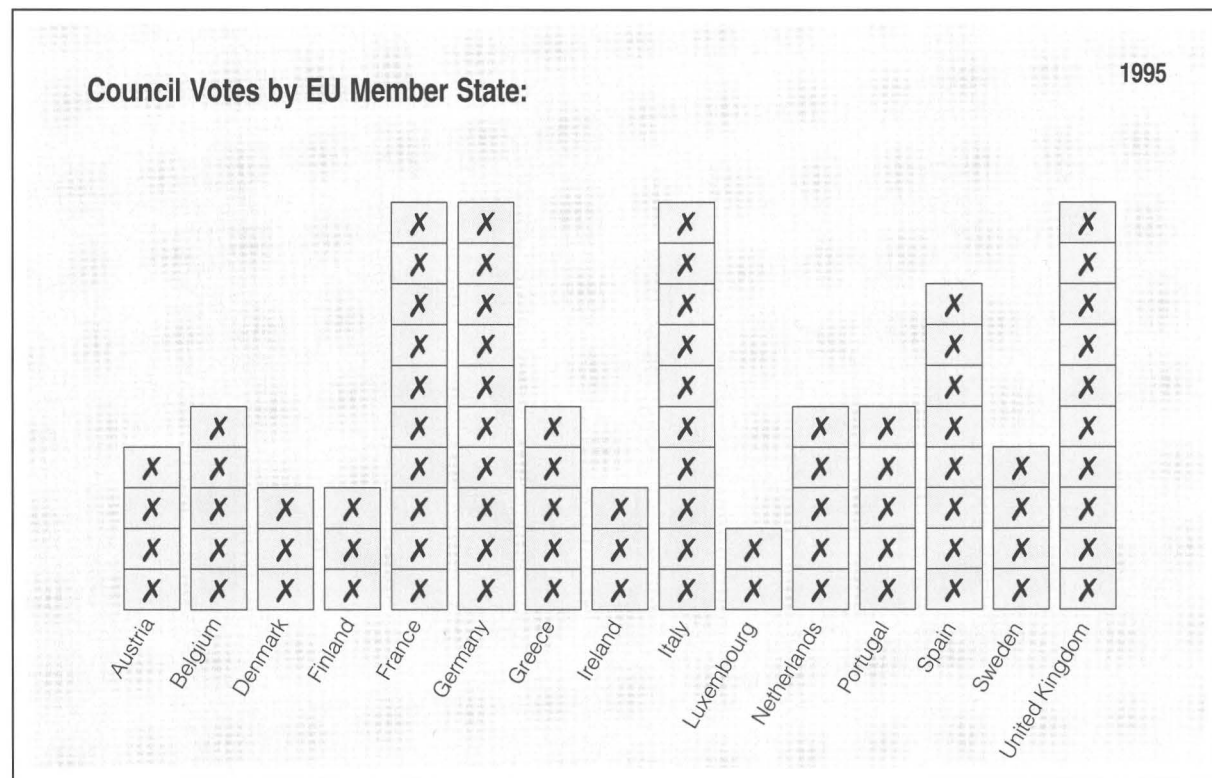
Depending on the policy area, voting procedures at the Council entail either unanimity or qualified or simple majority voting. Recently, unanimity has been often replaced by qualified majority voting. Unanimity voting is nowadays restricted to sensitive domains directly affecting the highest national interests of the Member States (e.g. defence, foreign policy, new accessions, taxation).

2.2. The EU and Its Institutions

The Single European Act had already extended majority voting to decisions linked to the completion of the internal market: regional policy, research and technology, and improvement of the working environment. The Treaty of the European Union reinforced qualified majority voting at the Council to modify the national veto on Community policies that previously required unanimity, such as education, public health, capital movements, transport, social policy, and environment. Since the recent enlargement, 62 out of 87 votes are required to obtain a qualified majority.

■ *European Parliament*

The Parliament is a democratically elected body that represents the citizens of Europe (Art. 137–144); it holds its meetings in Brussels and Strasbourg, and it has its Secretariat in Luxembourg. Since 1979, its members have been elected by direct, universal suffrage; the latest parliamentary elections took place in June 1994. The number of Euro-MPs (Members of Parliament) was increased from 518 to 626, following German unification and the recent accession of Austria, Finland and Sweden. The seats are divided according to the size (population) of each Member State.



2.2. The EU and Its Institutions

The Euro-MPs belong to 10 different political groupings, the main ones being the Socialist Group (221 seats), the European's People Party (173 seats), and the Liberal, Democratic and Reformist Group (52 seats). The rest of the 180 seats is divided among smaller parties, which control 19–31 seats each (e.g. 25 for the “Greens” or Ecologists).

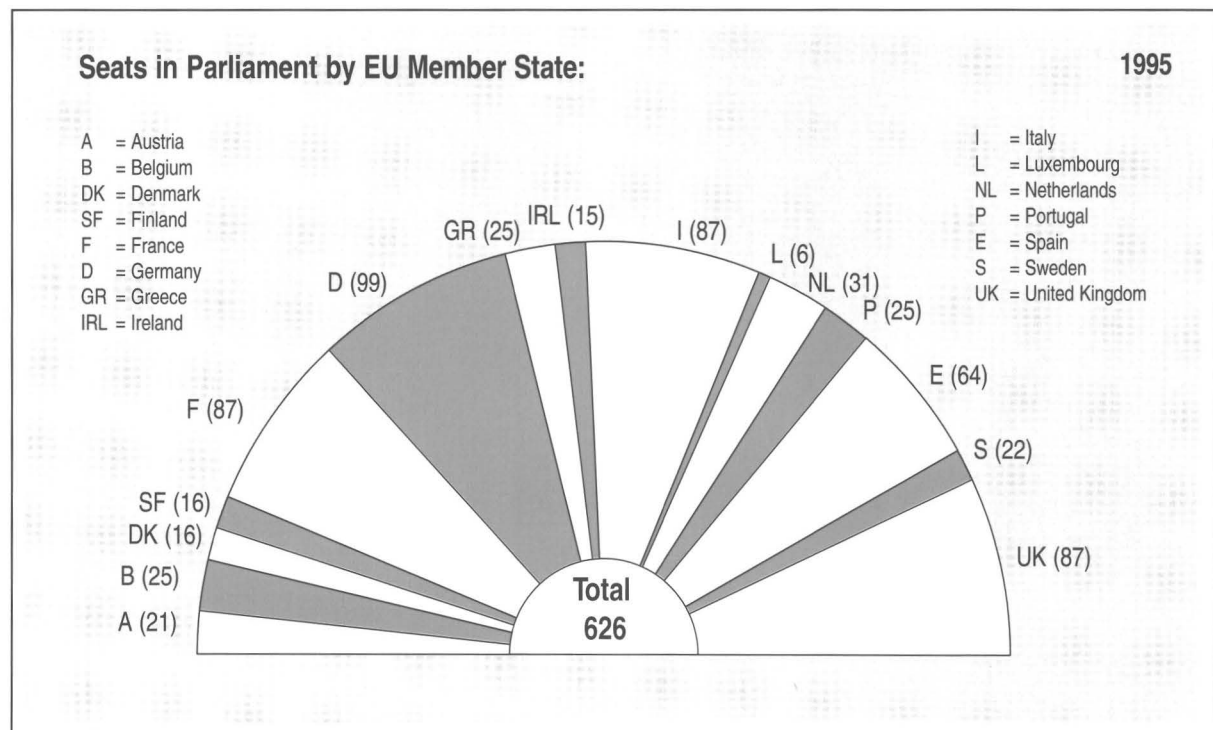
Both the Single Act and, most recently, the Treaty of the European Union, have strengthened the Parliament's prerogatives and extended its powers and responsibilities. The Parliament now controls the activities of both the Commission and Council through written and oral questions; it has also acquired the power to institute proceedings before the Court of Justice. The Parliament actively participates in the Union's legislative process through the co-decision and co-operation procedures (Art. 189b–c) and approves the

Union's budget (Art. 203). New responsibilities include assent to new accessions or association agreements (Art. 228 and 238), approval or rejection of the newly-appointed Members of the Commission (Art. 158); and the right to receive petitions from EU citizens (Article 138d).

■ European Commission

The Commission is the civil service of the Community. It has over 13 000 officials and it is managed by 20 Commissioners, each with a portfolio of 3–4 Directorates-General. The five largest countries have two Commissioners each and the remaining 10 members, one each.

As the “guardian” of the Treaties, it oversees, under the supervision of the Court of Justice, the application and implementation of legislative acts by the Member States administrations or other



2.2. The EU and Its Institutions

relevant entities, including enterprises. The Union Treaty has extended the Commission's investigative powers and allows it to impose fines (e.g. on enterprises that violate competition policy rules).

Articles 155–163 of the Treaty specify the Commission's responsibilities and working rules. Its main powers include:

- Power of initiative to propose measures to the Council for the development of EU policies (e.g. agriculture, internal market, social and regional cohesion, external trade with third countries)
- Power to implement Community policies on the basis of Council decisions or Treaty provisions
- Extended powers in sectors such as coal and steel, nuclear energy, and competition
- Power to negotiate international trade and labour agreements on behalf of the Community (e.g. GATT, OCDE, ILO)
- Power to run the EU's social, regional, structural, and agricultural funds, as well as technical assistance programmes for transitional economies and developing countries.

Currently, the Commission cannot influence decision-making in the two “inter-governmental pillars” of the common foreign and security policy (CFSP) and coordination of justice and home affairs (JHA). But, in future, its role may increase

as responsibilities in selected areas, which are now handled strictly between governments (at Council level), may be partially transferred to the Union level of decisionmaking (e.g. visa and immigration policy).

■ *Court of Justice of the European Communities*

The composition and role of the Court of Justice as well as the different types of procedures and matters to be brought before it, are specified under Articles 164–188 of the Union Treaty. The Court's chief role is to ensure that the Treaty is interpreted and implemented in accordance with Community legislation. It judges cases at the request of an EU institution, a Member State or a legal person directly affected by Community law. It can also act at the request of a national court of any Member State on the interpretation and validity of points of legislation (preliminary rulings under Art. 177).

Through its judgements, the Court has contributed to the development of Community law. Since 1 January 1995 the Court is composed of 15 judges (previously 13) and 9 advocates-general (previously 6). Procedural rules are laid down in Protocol B on the Statute of the Court of Justice appended to the Union Treaty and in the Rules of Procedure of the Court.

2.2. The EU and Its Institutions

Cases brought before the Court usually concern:

- disputes between Member States
- disputes between Member States and EU institutions
- disputes between EU institutions
- disputes between individuals and EU institutions
- opinions on international agreements (Art. 228)
- preliminary rulings, when disputes pending before national courts are referred to the Court of Justice (allows uniform interpretation of Community law)

The Union Treaty has reinforced the authority of the Court by granting it the right to inflict a fine on a Member State, which has not complied with Community law (Art. 171).

To ease the burden on the Court, a special Court of First Instance (CFI) was established on 1 November 1989. Like the Court of Justice, it has 15 judges. The CFI exercises, at first instance, the jurisdiction originally conferred to the Court of Justice in the following spheres (with the right of appeal before the Court of Justice):

- disputes between the EU institutions and their servants (Art. 179)
- actions brought against an EU institution by natural or legal persons on the basis of Articles 173 and 175 (if a decision is of direct and individual concern) and those relating to the implementation of competition rules applicable to enterprises (Art. 85–86).

■ *European Court of Auditors*

All the Union's financial activities are monitored and audited by the Court of Auditors, which was made an institution of its own right by the Union Treaty (Art. 188a–c), allowing it to bring cases before the Court of Justice. It is composed of 15 permanent members who are appointed by unanimous decision of the Council, after consultation of the Parliament. The Court of Auditors may address opinions and observations to any other institution or a Member State; it ensures that

- accounts are reliable
- all Community revenue has been collected and expenditure incurred in a lawful and regular manner
- financial management is sound

Its control extends to the Member States and third countries that receive aid from the EU (countries of central and eastern Europe; and African, Caribbean, and Pacific countries). The Court publishes its annual report in the *Official Journal* and disseminates special reports whenever necessary. The Parliament and Council of Ministers then react publicly to these budget-related comments and proposals for future improvements.

As the Court of Auditors has acquired extensive experience in budgeting and finance, it is often asked for advice and official statements when legal texts pertaining to financial matters are under preparation.

Territory and Climate

Key Facts (1993)	CIS 12	EUR 15
Area (mn km ²)	22.2	3.2
Agricultural land (%)	23.5	44
Forests (%)	36.3	30
Large countries (1 000 km ²)	Russia (17 075) Kazakhstan (2 717) Ukraine (604)	France (549) Spain (505) Sweden (450)
Small countries (1 000 km ²)	Armenia (30) Moldova (34) Georgia (70)	Luxembourg (3) Belgium (31) Netherlands (41)
Major cities (1 000 inhab.)	Moscow (8 793) St. Petersburg (4 883) Kiev (2 645) Tashkent (2 106) Minsk (1 666) Tbilisi (1 253)	Paris (9 061) London (6 378) Berlin (3 457) Athens (3 100) Madrid (2 909) Rome (2 791)

3.1. Territory

CIS

With an area of over 22 million km², the CIS represents one-sixth of the world's landmass; it stretches over 11 time zones across Europe and Asia. The combined area of the 12 countries is about seven times larger than that of the EU. The CIS extends over 10 000 km from east to west and about 5 000 km from north to south. Russia (17 million km²) is the largest country not only in the CIS but also in the world; it occupies 77% of the total CIS area. The second largest CIS country is Kazakhstan (ninth largest in the world), followed by Ukraine (604 000 km²), whose area is slightly bigger than that of the largest EU country, France. Four CIS republics — Armenia, Azerbaijan, Georgia, and Moldova — have an area smaller than 100 000 km², compared with seven

countries in the EU. Population density is highest in these small republics. The CIS is less urbanized than the EU. The country with the highest proportion of urban area is Ukraine (2%), which has the second largest industrial base in the CIS after Russia.

The CIS landscape is extremely varied. The vast plains in the south and east are surrounded by mountain ranges. The highest peaks, located in the Pamir region of Tajikistan, exceed 7 000 m in altitude. Forests occupy significant areas in Russia (45%), Georgia (40%), and Belarus (34%). Arid steppe and deserts cover large parts of the Central Asian republics, where forests represent only about 3–4% of the area.

EU

Following the unification of Germany in 1990 and the recent accession of Sweden, Finland, and Austria, the total EU area has expanded by 43% to 3.2 million km². The EU now extends over 4 000 km from north to south and 3 300 km from east and west. France and Spain have the largest territories; together, they accounted for half of the area of the European Community until the latest (fourth) enlargement; they now represent one-third of the total area.

About 44% of the EU area is agricultural land and 30% is covered by forests. Sweden and Finland have the largest shares of forest area (60–70%). Denmark, however, differs from its Scandinavian

neighbours in that only 11% of its territory is covered by forests and 64% of its surface area is occupied by agricultural land — the second highest percentage after the United Kingdom (73%). Ireland (63%) follows closely, ahead of Italy and France, where over half the area is agricultural land.

Cities and conurbations in the EU have a significantly higher share in total area than in the CIS. High concentration of cities (13–18%) are found in Belgium, Germany, Italy, Netherlands, and Portugal. Countries with lower population density also have a smaller urban area (e.g. Finland, Greece, Spain, Sweden).

3.1. Territory

	Total area (1 000 km ²)	1993		
		of which (%)		
		Agricultural area	Forest area ¹	Urban area ¹
Armenia	29.8	46.6	11.1	1.5
Azerbaijan	86.6	49.8	11.5	0.9
Belarus	207.6	44.5	33.9	0.9
Georgia	69.7	45.5	39.6	1.4
Kazakhstan	2 717.3	66.7	3.5	0.3
Kyrgyzstan	199.9	50.7	3.7	0.2
Moldova	33.7	75.5	9.4	1.7
Russia	17 075.4	12.3	45.2	0.3
Tajikistan	143.1	30.0	2.9	0.3
Turkmenistan	488.1	66.1	8.5	0.1
Ukraine	603.7	67.0	14.3	2.0
Uzbekistan	447.4	56.9	4.3	0.4
CIS 12	22 230.6²	23.5	36.3	0.4
Austria	83.9	42.0	38.0	3.0
Belgium	30.5	45.0	20.0	18.0
Denmark	43.1	64.0	11.0	6.0
Finland	337.1	8.0	69.0	3.0
France	544.0	55.0	27.0	5.0
Germany	356.9	48.0	29.0	14.0
Greece	132.0	41.0	44.0	4.0
Ireland	70.3	63.0	5.0	...
Italy	301.3	56.0	21.0	13.0
Luxembourg	2.6	49.0	34.0	...
Netherlands	41.2	48.0	8.0	14.0
Portugal	92.4	49.0	32.0	15.0
Spain	504.8	52.0	31.0	4.0
Sweden	450.0	7.0	62.0	3.0
United Kingdom	244.1	73.0	9.0	7.0
EUR 15	3 234.2	44.0	30.0	...

1. For CIS 12 : forest area, at the beginning of 1988; urban area, at the beginning of 1990.

2. Including White Sea (90 000 km²) and Azov Sea (37 300 km²).

CIS

The sheer size and geographic spread of the CIS make it a region marked by sharp climatic contrasts and diversity of physical conditions. The northernmost part of the Russian Federation is located in the arctic and subarctic zone, where temperature in the warmest months (July, August) reaches only 8°C and winter temperatures often drop below -35°C. The northwestern part of Russia, along the Baltic Sea and in Karelia, is characterized by a maritime climate, while Siberia has a continental climate with extreme winter temperatures (up to -65°C in the city of

Verchoyansk located on the Arctic circle). The eastern Siberian part bordering the Pacific Ocean has a monsoon climate.

In the southern part, the Central Asian plains have an arid continental climate with hot summers when temperatures average 27–32°C. The southwestern part of Central Asia, Caucasus and southern Crimea (Ukraine) are subtropical regions. Mild, wet winters and dry, hot summers prevail in the regions surrounding the Black Sea (Georgia, southern Russia, and Ukraine); the vegetation is Mediterranean.

EU

The EU territory stretches from Crete in southern Greece (35°N) to the northernmost tip of Finland (70°N). The large seas and ocean — Mediterranean Sea, North Sea, Baltic Sea, Atlantic Ocean — that surround the EU determine its climatic diversity. The western part (Belgium, France, Netherlands, United Kingdom) has a maritime climate with mild winters and cool summers; average temperatures range from 2°–4°C in winter to 10°–15°C in summer. The Mediterranean climate — mild, wet

winters (2°–15°C), and hot, dry summers (14°–23°C) — prevails in southern France, Greece, Italy, and Spain.

Away from the maritime influence, Austria and most of Germany have a continental climate with cold, dry winters — when temperatures often drop below 0°C — and warm, rainy summers. To the north, Finland and Sweden have cold, long, and windy winters, with average temperatures below 0°C.

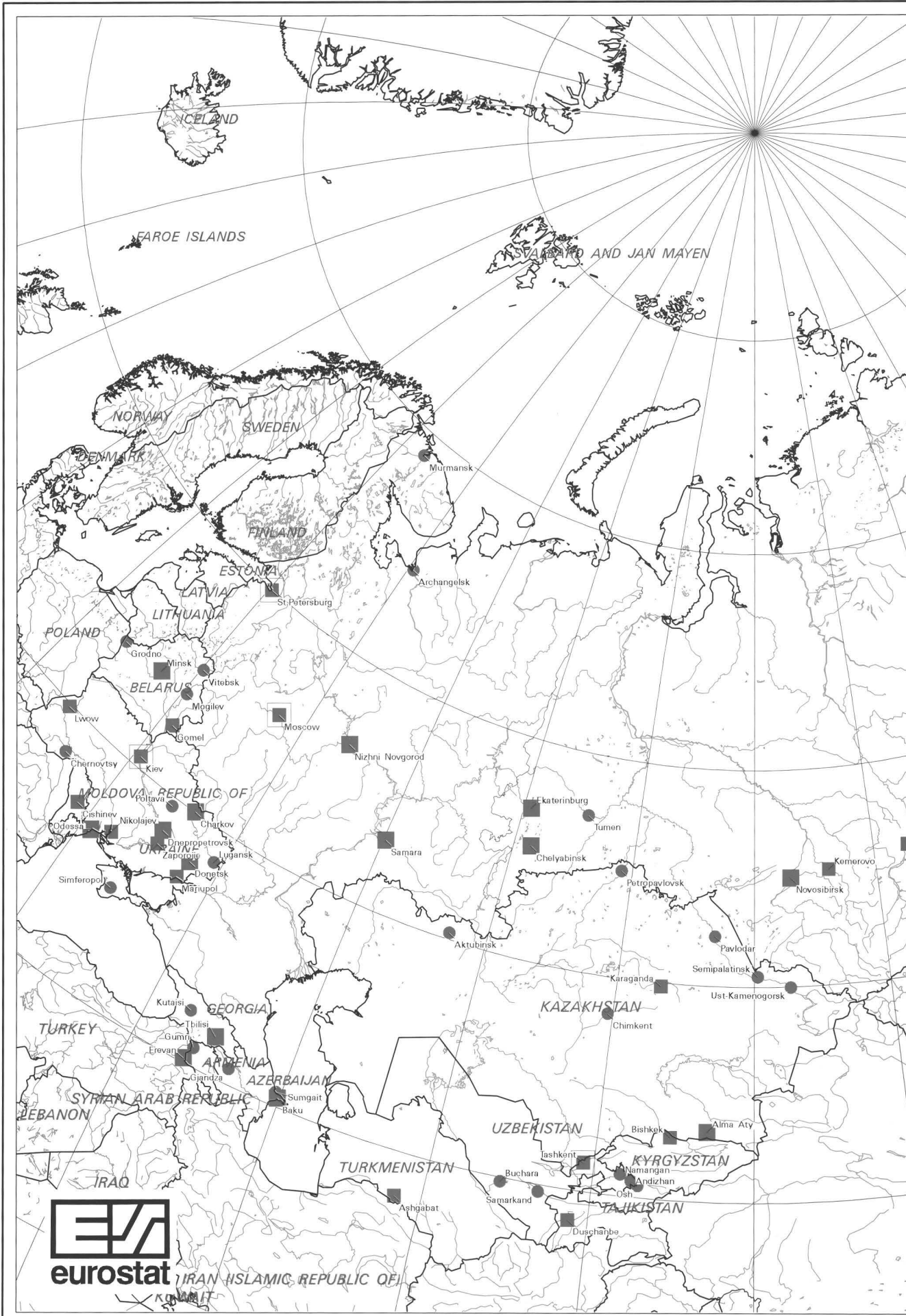
3.2. Climate

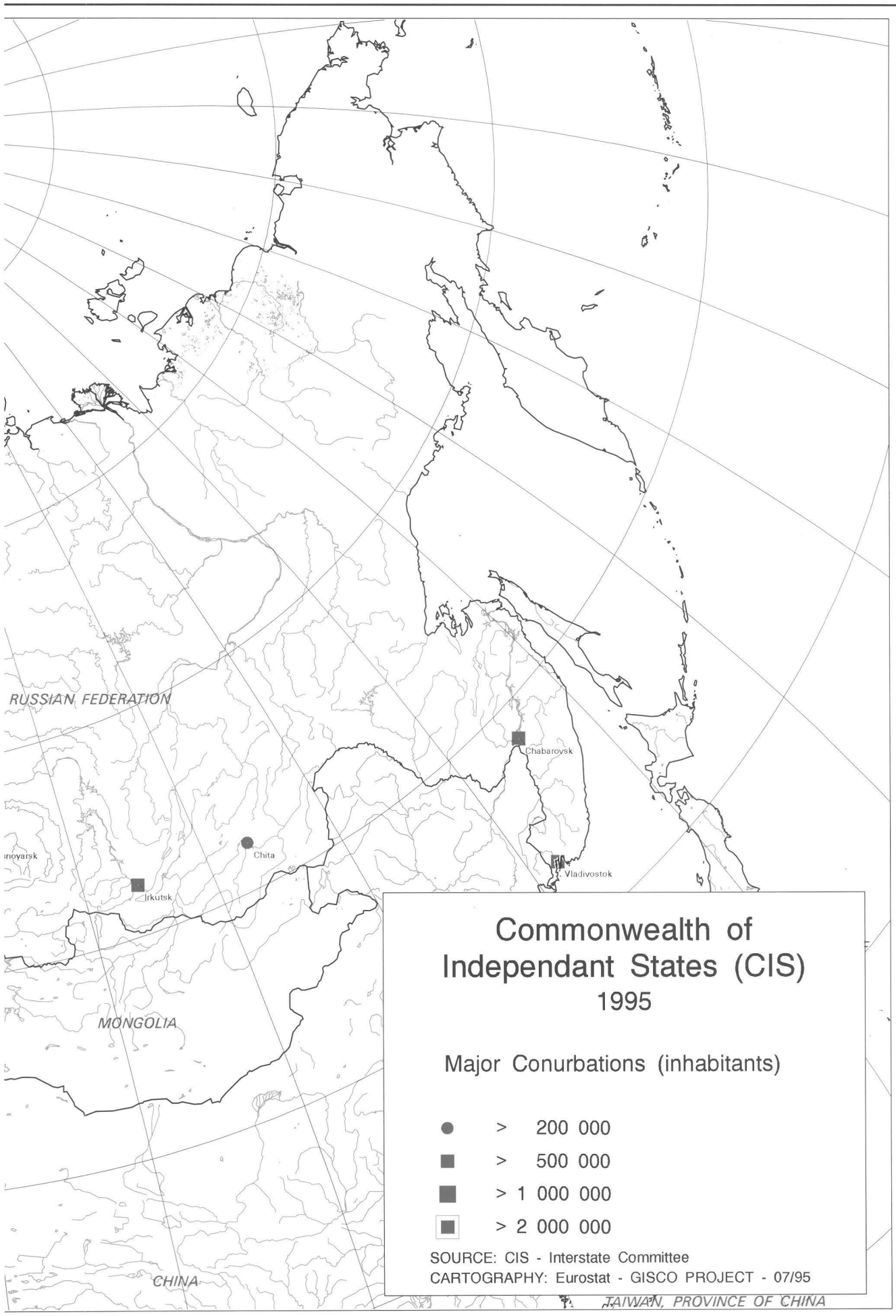
	Average temperature (°C)				Annual rainfall (mm)	
	minimum	Winter maximum	minimum	Summer maximum	minimum	maximum
Armenia	-9	7	17	32	77	1 280
Azerbaijan	-4	7	22	30	78	1 685
Belarus	-16	0	15	21	280	1 016
Georgia	-6	10	15	31	212	3 943
Kazakhstan	-25	-8	21	25	22	1 212
Kyrgyzstan	-14	-2	14	23	68	1 386
Moldova	-12	2	19	21	208	853
Russia	-24	-11	14	19	...	...
Tajikistan	-12	4	14	30	79	1 177
Turkmenistan	-7	6	28	31	21	593
Ukraine	-12	1	18	23	93	1 651
Uzbekistan	-7	4	27	33	19	1 302
CIS 12¹						

Austria	-4	4.5	13	17	581	1 443
Belgium	3	7	12	16	549	1 150
Denmark	3	4.6	11	13	557	905
Finland	2	2.5	11	11	512	589
France	2	12	13	20	368	1 234
Germany	-1	6	8	17	435	1 495
Greece	5	15	18	23	197	730
Ireland	7	9	12	13	502	1 332
Italy	3	15	15	23	227	1 319
Luxembourg	4	4	15	15	832	832
Netherlands	5	7	13	15	632	959
Portugal	8	14	16	20	518	1 069
Spain	6	15	14	23	185	1 587
Sweden	0	4	11	13	373	1 041
United Kingdom	4	8	10	15	530	1 648
EUR 15²						

1. For CIS 12: average temperature for January (winter) and July (summer) during 1960-1995.

2. For EUR 15: 1992/1993 winter average (October-March) and summer average (April-September).





Commonwealth of Independent States (CIS) 1995

Major Conurbations (inhabitants)

- > 200 000
- > 500 000
- > 1 000 000
- > 2 000 000

SOURCE: CIS - Interstate Committee
CARTOGRAPHY: Eurostat - GISCO PROJECT - 07/95

TAIWAN, PROVINCE OF CHINA

European Union (EU)

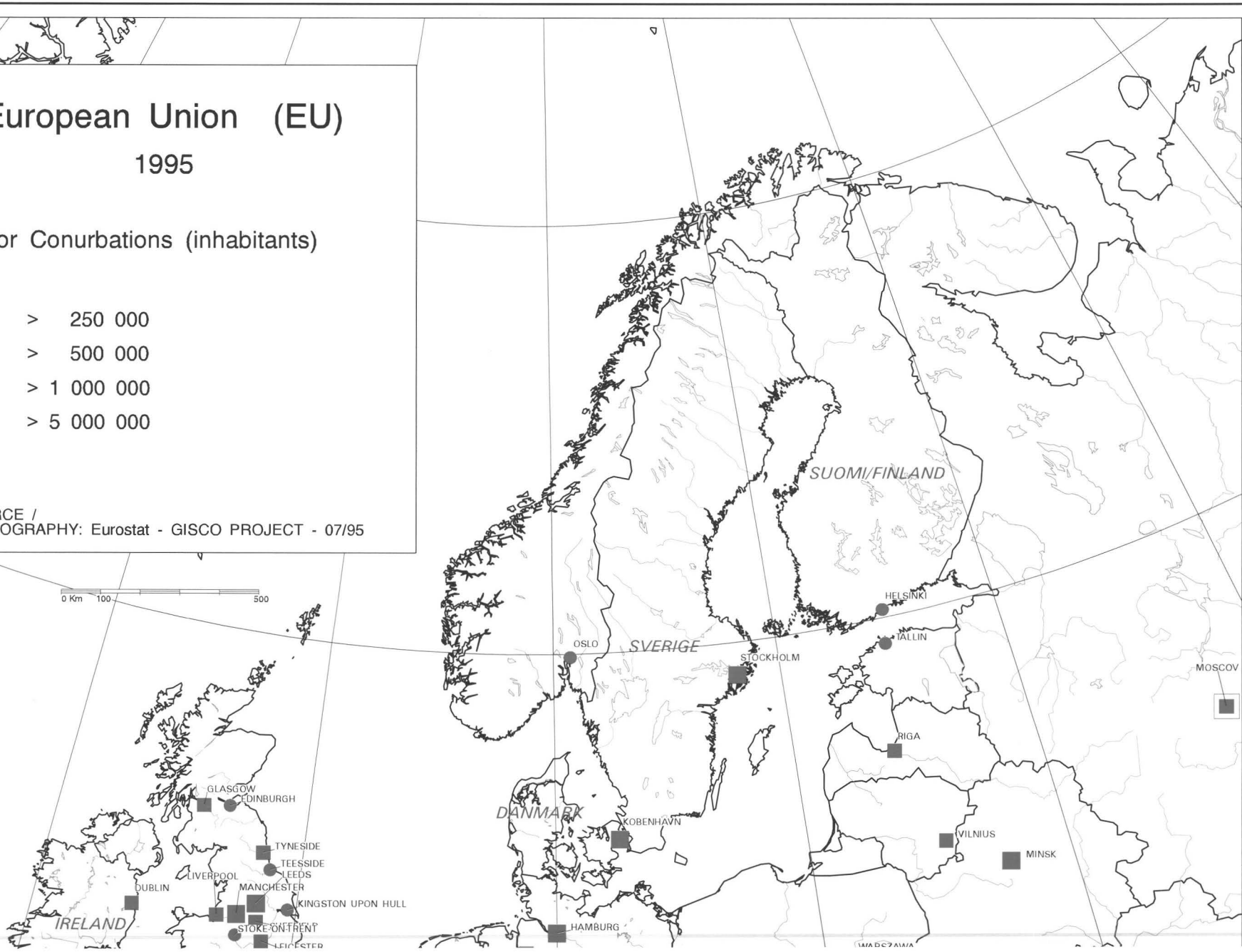
1995

Major Conurbations (inhabitants)

- > 250 000
- > 500 000
- > 1 000 000
- > 5 000 000

SOURCE /
CARTOGRAPHY: Eurostat - GISCO PROJECT - 07/95

0 Km 100 500





Population

Key Facts (1993)	CIS 12	EUR 15
Total population (mn)	285.3	369.7
Population density (inhab./km ²)	13	114
Population age groups (%)		
– under 15 years	25.8	17.9
– 15–64 years	64.8	67.2
– 65 years and above	9.4	15.0
Births (per 1 000 inhab.)	13.5	11.1
Deaths (per 1 000 inhab.)	12.6	10.1
Natural increase/decrease (per 1 000 inhab.)	0.9	1.0
Marriages (per 1 000 inhab.)	7.9	5.3
Divorces (per 1 000 inhab.)	3.7	1.6
Households/families (mn)	70.9 ¹	143.3
Households with 1–2 persons (%)	31 ¹	57
Households with 3 persons (%)	26 ¹	18
Households with 4 persons (%)	24 ¹	17
Households with 5 persons and more (%)	19 ¹	8

1. For CIS 12: 1989 census data.

4.1. Population, Density, and Urban Population

CIS

The population of the CIS accounts for roughly 5% of the world total, which is slightly lower than the share of the EU (7%). In 1993, there were 285.3 million people living in the CIS. Slightly over half of the population was concentrated in Russia (148.5 million). Ukraine had the second largest population (52.2 million), followed by Uzbekistan (21.9 million) and Kazakhstan (17 million). The population of five countries (Georgia, Kazakhstan, Kyrgyzstan, Russia, and Ukraine) decreased in 1993.

Population density in terms of inhabitants/km² is generally lower in CIS than in EU countries. It ranges from 6–9 in Kazakhstan, Russia, and Turkmenistan to 126 in Armenia and 129 in Moldova. More than 73% of the population in Russia lives in cities; in Armenia, Belarus, and Ukraine the rate exceeds 66%. The CIS has about 24 cities with a population each of more than 1 million.

EU

The combined population of the 15 EU Member States increased by 6% after the recent enlargement on 1 January 1995, and now it stands at 370 million. Germany, which has 81.2 million inhabitants, is the most populous country of the Union. Next come France, Italy, and the United Kingdom with populations of just under 60 million each.

Average population density in the EU fell from 147 inhabitants/km² to 114 inhabitants/km² following the accession of Finland and Sweden. Densities in these two countries are under 20 inhabitants/km², by far the lowest in the EU, but they are above the CIS average of

13 inhabitants/km². Belgium (331 inhabitants/km²) and the Netherlands (372 inhabitants/km²) are the most densely populated countries in the EU. Germany's population density fell from 250 inhabitants/km² to 227 inhabitants/km² following unification in 1990.

Over 80% of the population of Belgium, Germany, the Netherlands, and the United Kingdom live in urban areas. Conurbations of over 250 000 inhabitants are numerous in Germany (39), France (19), and the United Kingdom (17). Conurbations account for almost one-third of the total population in these three countries.

4.1. Population, Density, and Urban Population

1993

	Total population ¹ (1 000)	of which (%)		Population density ⁴
		Female	Urban ³	
Armenia	3 732.0	51.6	67.7	126
Azerbaijan	7 399.3	50.9	53.2	86
Belarus	10 356.5	53.0	68.2	50
Georgia	5 438.3	52.4 ²	55.7	78
Kazakhstan	16 964.0	51.4 ²	56.6	6
Kyrgyzstan	4 482.3	50.7	35.6	22
Moldova	4 350.3	52.3	46.8	129
Russia	148 519.6	53.0	73.1	9
Tajikistan	5 637.7	50.3	28.7	40
Turkmenistan	4 307.7	50.6	45.4	9
Ukraine	52 179.2	53.5	67.9	86
Uzbekistan	21 947.0	50.5	39.0	50
CIS 12	285 313.9	...	65.1	13
Austria	7 986.0	51.9	...	94
Belgium	10 084.5	51.1	...	330
Denmark	5 188.6	50.7	...	120
Finland	5 066.0	51.4	61.6	15
France	57 654.5	51.3	74.0	105
Germany	81 179.2	51.4	...	227
Greece	10 368.2	50.7	...	78
Ireland	3 563.3	50.3	56.4	51
Italy	57 057.0	51.4	...	189
Luxembourg	398.1	50.9	...	152
Netherlands	15 290.3	50.6	88.7	370
Portugal	9 876.1	51.8	33.9	107
Spain	39 082.6	51.0	...	78
Sweden	8 718.6	50.6	83.4	19
United Kingdom	58 191.2	51.1	...	238
EUR 15	369 704.2	51.2	...	114

1. Average annual population.

2. 1992.

3. For EUR 15: latest available data from UN Demographic Yearbook 1992.

4. Inhabitants/km².

4.2. Age Structure

CIS

In many CIS countries the proportion of old people is growing. This ageing of the population is most noticeable in Belarus, Russia, and Ukraine where the proportion of young people is comparatively low (21–23%). In these three countries, as in most EU Member States, about two-thirds of the population are already of

working age. In Moldova, the share of old people is also rising steadily.

The situation is quite different in the “younger” Central Asian republics of Tajikistan, Turkmenistan, and Uzbekistan, where over 40% of the population is under 15 years of age and only about 4% is over 65.

EU

The population in the EU is ageing much faster than in the CIS. In practically all countries, the proportion of young people is falling. Pension funds, public healthcare schemes, and social security services are already coming under pressure. In more than half the Member States (Austria, Belgium, Denmark, Germany, Greece, Italy, Sweden, and the United Kingdom) those over 65 years already represent more than 15% of the total population; they are expected to reach

18–19% by the turn of the century. Ireland has the largest proportion of young people, who represent over 25% of the total population. But even this level is almost 15–19 points lower than that registered in certain Central Asian republics (Tajikistan Turkmenistan, and Uzbekistan), suggesting that in the EU an ever smaller population of working age will have to support an increasing number of senior citizens.

4.2. Age Structure

1991-1994

	Year ¹	Age groups in % of total population		
		under 15	15-64	65 and over
Armenia	1993	30.0	63.3	6.7
Azerbaijan	1994	33.3	61.4	5.3
Belarus	1993	22.7	65.9	11.4
Georgia	1991	24.6	65.9	9.5
Kazakhstan	1991	31.4	62.6	6.0
Kyrgyzstan	1994	37.9	56.7	5.4
Moldova	1993	27.5	63.9	8.6
Russia	1994	21.9	66.6	11.5
Tajikistan	1993	43.7	52.4	3.9
Turkmenistan	1992	40.3	55.8	3.9
Ukraine	1992	21.2	66.2	12.6
Uzbekistan	1991	41.0	55.0	4.0
CIS 12	1991	25.8	64.8	9.4
Austria	1993	17.5	67.2	15.3
Belgium	1994	18.1	66.3	15.6
Denmark	1994	17.1	67.5	15.4
Finland	1994	19.1	67.0	13.9
France	1994	19.8	65.5	14.7
Germany	1994	16.4	68.4	15.2
Greece	1994	17.2	67.8	15.0
Ireland	1994	25.3	63.2	11.5
Italy	1993	15.5	69.0	15.5
Luxembourg	1994	18.1	68.1	13.8
Netherlands	1994	18.4	68.5	13.1
Portugal	1994	18.4	67.4	14.2
Spain	1994	17.4	68.1	14.5
Sweden	1994	18.7	63.7	17.6
United Kingdom	1993	19.3	64.9	15.8
EUR 15	1993	17.8	67.2	15.0

1. At the beginning of the year.

4.3. Births and Deaths

CIS

Since 1990 natural population increase (births minus deaths) has slowed down across the CIS. A net decline in population has been reported for Ukraine (since 1991), Russia (since 1992), and Belarus (since 1993). In Russia, deaths exceeded births by 800 000 in 1993, and the country recorded both the lowest birth rate (9.4 per 1 000 inhabitants) and the highest death rate (14.5 per 1 000 inhabitants) in the CIS.

In 1993 birth rates declined in all CIS countries except Tajikistan. Compared with 1986 — the year with the highest birth rate in the past 50 years — the 1993 rate in the CIS fell by 33% to 13.5 births per 1 000 inhabitants (compared with –8% in 1992). In 1993 the number of deaths in the CIS totalled 3.6 million (12.6 deaths per 1 000 inhabitants) — 429 000 or an increase in the death rate of 14% over 1992.

EU

Overall declining birth rates are making the population profile increasingly top heavy in the EU. There is already a higher proportion of middle-aged people and pensioners than in the 1980s. Germany and Italy have experienced for many years a natural decline in population owing to below-average birth rates (less than 10 per 1 000 inhabitants in 1993 — as low as for Russia in the CIS). In Germany, this decline is partially offset by an influx of immigrants, many of whom are young.

The highest birth rates are recorded in Ireland and Luxembourg, where tax incentives and other benefits are offered to promote large families. Ireland also recorded the highest natural increase (5 per 1 000 inhabitants). Denmark, Germany, Sweden, and the United Kingdom, which have an above-average proportion of aged people, had the highest death rate (11–12 per 1 000 inhabitants) in the EU.

4.3. Births and Deaths

1993

(per 1 000 inhabitants)

	Births	Deaths	Natural increase/ decrease	Marriages	Divorces
Armenia	15.8	7.4	8.4	5.8	0.8
Azerbaijan	24.2	7.3	16.9	8.3	0.9
Belarus	11.3	12.4	-1.1	7.9	4.3
Georgia	12.6	10.1	2.5	4.9	0.7
Kazakhstan	18.6	9.2	9.4	8.6	2.7
Kyrgyzstan	26.1	7.7	18.4	8.2	1.6
Moldova	15.2	10.7	4.5	9.1	3.3
Russia	9.4	14.5	-5.1	7.5	4.5
Tajikistan	33.1	8.7	24.4	9.6	0.9
Turkmenistan	33.1	7.9	25.2	10.7	1.4
Ukraine	10.7	14.2	-3.5	8.2	4.2
Uzbekistan	31.5	6.6	24.9	10.3	1.2
CIS 12	13.5	12.6	0.9	7.9	3.7
Austria	11.9	10.3	1.6	5.6	2.0
Belgium	11.9	10.6	1.3	5.4	2.1
Denmark	13.0	12.1	0.9	6.1	2.5
Finland	12.8	10.1	2.7	4.9	2.5
France	12.3	9.2	3.1	4.4	1.9
Germany	9.8	11.1	-1.2	5.4	1.9
Greece	9.8	9.4	0.4	6.0	0.7
Ireland	13.9	8.9	5.0	4.4	-
Italy	9.4	9.5	-0.1	5.1	0.4
Luxembourg	13.6	9.8	3.8	6.0	1.8
Netherlands	12.8	9.0	3.8	5.8	2.0
Portugal	11.5	10.8	0.8	6.9	1.2
Spain	9.9	8.7	1.3	5.2	0.7
Sweden	13.5	11.1	2.4	3.9	2.5
United Kingdom	12.9	11.1	1.8	6.1 ¹	3.0 ¹
EUR 15	11.1	10.1	1.0	5.3	1.6

1. 1991.

4.4. Migration

CIS

Migration within the CIS has slowed down during the past few years. In 1993 the total number of migrants in the CIS stood at 6.4 million, which was 1.4 times lower than in 1990. The highest emigration rates in 1993 were reported from Kazakhstan and Kyrgyzstan, which showed a net decrease in population. Armenia, Azerbaijan, Georgia, Moldova, Tajikistan, and Uzbekistan also reported net departures, especially among the Russian minorities. The main countries of destination were Belarus, Russia, and Ukraine; they received about three-quarters of all arrivals within the CIS during 1990–1993. Russia alone

accounted for 80% of the 0.7 million arrivals recorded by these three countries.

Emigration to “far abroad” countries — those beyond the frontiers of the former Soviet Union — continues but at a lower rate. In 1993 the number of persons emigrating from the CIS was estimated at 280 000–290 000 compared with 330 000–350 000 for 1991–1992 and 436 000 for 1990. Over 90% of the emigrants have settled in Germany, Greece, Israel, and the United States. About 90% of the emigrants to Germany come from Kazakhstan and Russia, and about 75% of those to Israel are from Russia and Ukraine.

EU

Western Europe has long attracted large numbers of immigrants. While earlier waves of immigrants during the 1950s, 1960s and 1970s came from former colonies in Africa, Asia, and the Caribbean, the early 1990s saw a significant influx from eastern Europe following the end of the East-West divide. In countries like Austria, Germany, and the United Kingdom, net migration already compensates for the natural decline in population.

In 1993 net migration in the EU showed a positive balance of 1.2 million. In absolute terms, Germany recorded the highest flows in terms of both immigration (1.5 million) and emigration (700 000). The high positive balance (800 000) can be attributed to its geographic position in the middle of Europe and the return of many people

of German descent from central and eastern Europe and the former Soviet Union (e.g. Kazakhstan), who enjoy special rights of access. Since 1991, the civil war in former Yugoslavia has led to a flow of refugees into Germany and the neighbouring countries of Austria, Italy, and Greece. Other countries with high immigration in 1993 were: the United Kingdom (216 000), Italy (114 000), France (111 000), and the Netherlands (108 000). Ireland was the only EU country which experienced net emigration in that year.

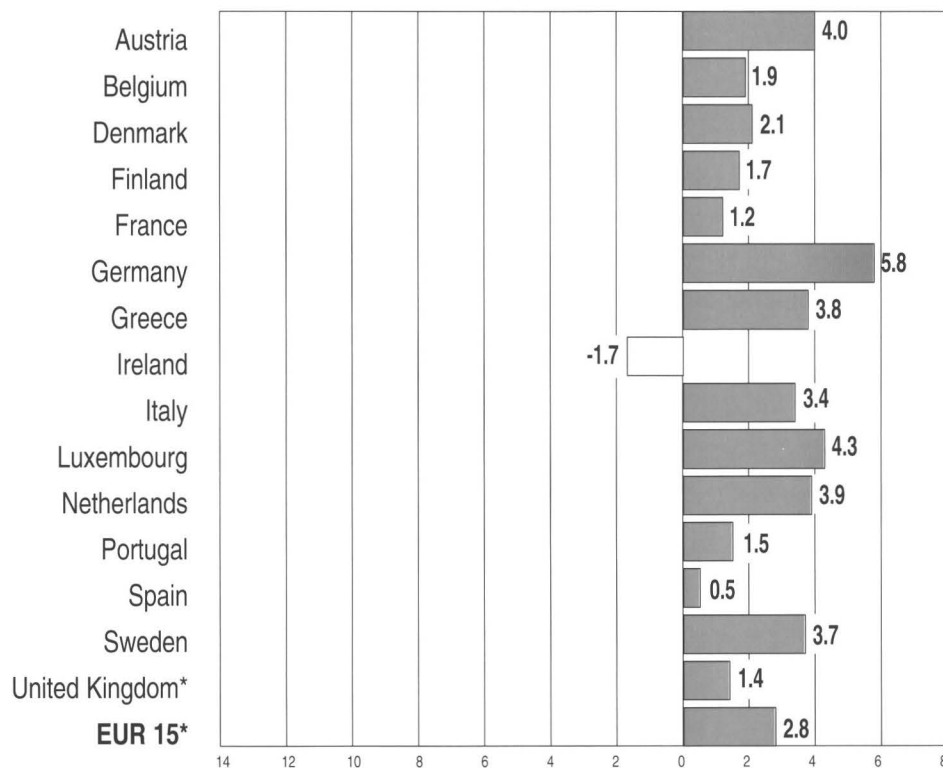
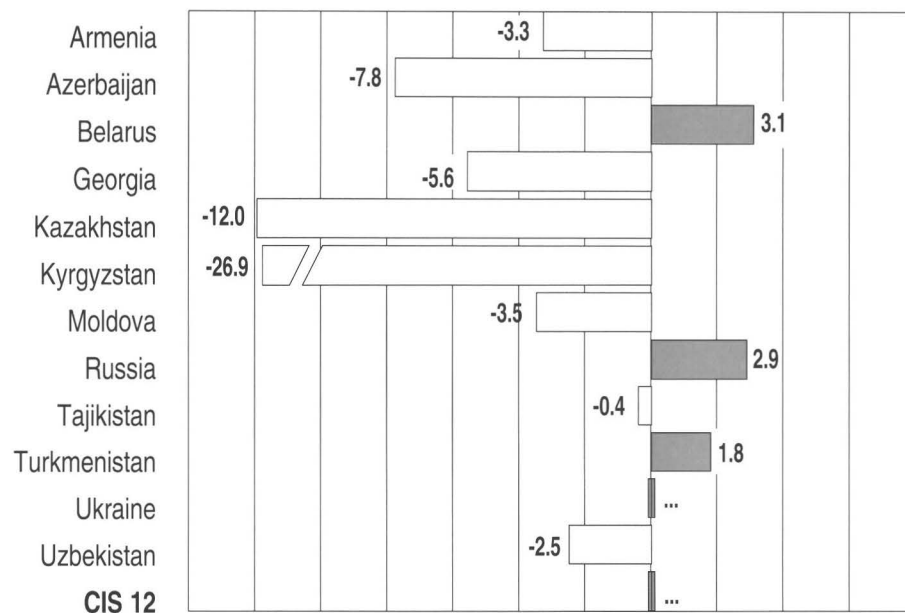
The EU countries with the highest total number of immigrants are: Germany (about 6 million), France (about 4 million), United Kingdom (about 3 million), Italy (over 1 million), and the Netherlands (almost 1 million).

4.4. Migration

1994

(per 1 000 habitants)

Net Migration:



4.5. Household Composition

CIS

According to the 1989 census, there were about 71 million families in today's CIS republics. The average family consisted of 3.5 persons; the size was slightly larger in rural areas (3.8) than in the cities (3.4). The Central Asian and Caucasian countries generally had the largest average family sizes: Tajikistan (6.1 persons), Turkmenistan (5.6 persons), Uzbekistan (5.5 persons), Azerbaijan (4.8 persons), Kyrgyzstan and Armenia (both 4.7 persons); in these countries, a strong tradition still prevails for several generations to live together.

In countries like Tajikistan, Turkmenistan, and Uzbekistan, about 60% of all families consist of 5 or more persons. Very large families are less frequent in the European part of the CIS (Belarus, Moldova, Russia, and Ukraine); they represent 11–17% of all families. But even here the average family size is larger than in EU countries, where only Greece, Spain and Portugal and have a similar household composition.

EU

Household size has been declining over the last few years in the EU for many reasons including rising living standards, higher divorce rates, and greater female participation rates in the labour force. In the Scandinavian countries and Germany, there are already more single households than any other type. The trend towards smaller families can also be observed in

the Mediterranean countries, where however households with 2 and 3 persons still prevail over single households.

Household size does not vary greatly in the EU. Countries with the lowest average number of persons per household are Denmark and Germany (2.2–2.4), while Spain and Ireland average between 3.5 and 3.6 persons per household.

4.5. Household Composition

1993

	Total households ¹ (1 000)	Household size (%)			
		1-2 persons ²	3 persons	4 persons	5 persons and more
Armenia	559	13	14	26	47
Azerbaijan	1 381	15	14	21	50
Belarus	2 796	35	27	27	11
Georgia	1 244	21	20	25	34
Kazakhstan	3 824	23	22	25	30
Kyrgyzstan	856	17	17	21	45
Moldova	1 144	31	25	27	17
Russia	40 246	34	28	25	13
Tajikistan	799	11	11	15	63
Turkmenistan	598	12	13	16	59
Ukraine	14 057	35	27	24	14
Uzbekistan	3 415	12	13	17	58
CIS 12	70 919	31	26	24	19
Austria	3 058	56	18	16	10
Belgium	4 026	58	19	15	8
Denmark	2 526	73	13	11	3
Finland	2 121	63	15	14	8
France	22 511	60	17	15	8
Germany	35 779	65	17	13	5
Greece	3 636	48	20	22	10
Ireland	1 110	44	15	17	24
Italy	19 534	46	23	22	9
Luxembourg	152	53	19	17	11
Netherlands	6 324	64	14	16	6
Portugal	3 220	39	25	23	13
Spain	11 867	36	21	24	19
Sweden	3 830	71	12	12	5
United Kingdom	23 647	62	16	15	7
EC 15	143 341	57	18	17	8

1. For CIS 12: 1989 census data based on "family" concept.

2. For CIS 12: excluding single households.

Labour market

Key Facts (1993)	CIS 12	EUR 15
Economically active population (mn)	128.9	164.8
Activity rate (%)	46	45
Civil employment (mn)	127.9	147.5
Of which women employed (%)	50 ¹	44
Employment by economic sectors (%)		
Agriculture, forestry, and fisheries	20	6
Industry, energy, and construction	36	31
Services	44	63
Employment by occupational status (%)		
Employers, self-employed, and family workers	9.1 ¹	17.1
Employees	90.9 ¹	82.9
Persons unemployed (mn)	1.2 ²	17.1
Women unemployed (%)	67.0 ^{1,2}	44.2
Unemployment rate (%)	1.0 ²	11.0

1. Excluding Georgia.

2. Only officially registered; excluding Turkmenistan.

3. Excluding Turkmenistan.

5.1. Active Population and Employment

CIS

In 1993, the economically active population (employed and unemployed) totalled almost 129 million people in the CIS, three-quarters of whom were in Russia and Ukraine. This figure has remained fairly stable over the last four years, although there have been substantial changes in its composition. Thus, total employment has declined in most countries, except Turkmenistan, since the beginning of the 1990s. This trend is particularly visible in Armenia, Azerbaijan, Kazakhstan and Tajikistan.

The activity rate for the CIS was 46% (of total population) in 1993, which was just 1 percentage

point higher than the EU average. The highest activity rates were recorded in Russia (48%), Belarus (47%), and Ukraine (46%). The low rates in Tajikistan (33%), Georgia and Azerbaijan (both 37%) can be explained by the high proportion of young people under 15 in the total population.

Females accounted for slightly over half of all people employed in Belarus, Moldova, Russia, and Ukraine. In the EU, only Finland and Sweden came close to this level. Overall female participation in employment was 6 percentage points higher in CIS than in the EU.

EU

The 15 Member States reported a labour force (people employed and unemployed) of about 165 million in 1993, corresponding to 45% of total population. Germany (39.1 million), the United Kingdom (28.2 million), France (24.7 million), and Italy (22.6 million) together accounted for almost 70% of the EU labour force.

The activity rate ranges from below 40% in Spain and Ireland to 55% in Denmark. Countries with a high proportion of the population below

15 years have low activity rates (e.g. Ireland), whereas high female employment raised the rates in Germany, the Scandinavian countries, and the United Kingdom.

Female employment in the southern European countries of Greece, Italy, and Spain averaged only 35% in 1993, but this figure is on a rising trend as an increasing number of women enters the labour market.

5.1. Active Population and Employment

1993

	Economically active population		Civilian employment	
	Total ¹ (1 000)	Activity rate ²	Total ¹ (1 000)	Female (%)
Armenia	1 628	44	1 543	46
Azerbaijan	2 724	37	2 710	44
Belarus	4 879	47	4 824	51
Georgia	1 991	37	1 959	...
Kazakhstan	6 964	41	6 926	46
Kyrgyzstan	1 683	38	1 680	49
Moldova	1 700	45	1 688	51
Russia	71 569	48	70 852	51
Tajikistan	1 868	33	1 854	41
Turkmenistan	1 642	42	1 642	41
Ukraine	24 001	46	23 924	51
Uzbekistan	8 273	38	8 259	44
CIS 12	128 922	46	127 861	50 ³
Austria	3 728	47	3 570	42
Belgium	4 073	40	3 744	40
Denmark	2 875	55	2 567	47
Finland	2 474	49	2 030	49
France	24 718	43	21 908	44
Germany	39 113	48	36 111	42
Greece	4 101	40	3 715	35
Ireland	1 382	39	1 166	36
Italy	22 604	40	20 267	35
Luxembourg	169	42	165	36
Netherlands	7 085	46	6 640	40
Portugal	4 714	48	4 464	44
Spain	15 263	39	11 868	34
Sweden	4 286	49	3 912	49
United Kingdom	28 244	49	25 348	45
EUR 15	164 829	45	147 475	44

1. Annual average.

2. In % of total population.

3. Excluding Georgia.

5.2. Employment by Economic Sector

CIS

Since the early 1990s employment has shifted away from industry (down from 28% in 1991 to 26% in 1994) and construction (down from 11% in 1991 to 9% in 1994) to sectors such as retailing, insurance, and other services. Jobs have been created mainly in education (Armenia, Belarus, Kazakhstan, Moldova, Russia), health care (Belarus, Moldova, Russia, Turkmenistan), and national administration and government bodies (almost all CIS countries). Employment has also risen in the financial sector following an increase in the number of commercial banks and insurance companies. But the highest share of 46–47% (Kazakhstan, Russia) in the service sector was still, in 1993, 8–9 percentage points lower than in

Greece and Portugal, which have the lowest shares in the EU.

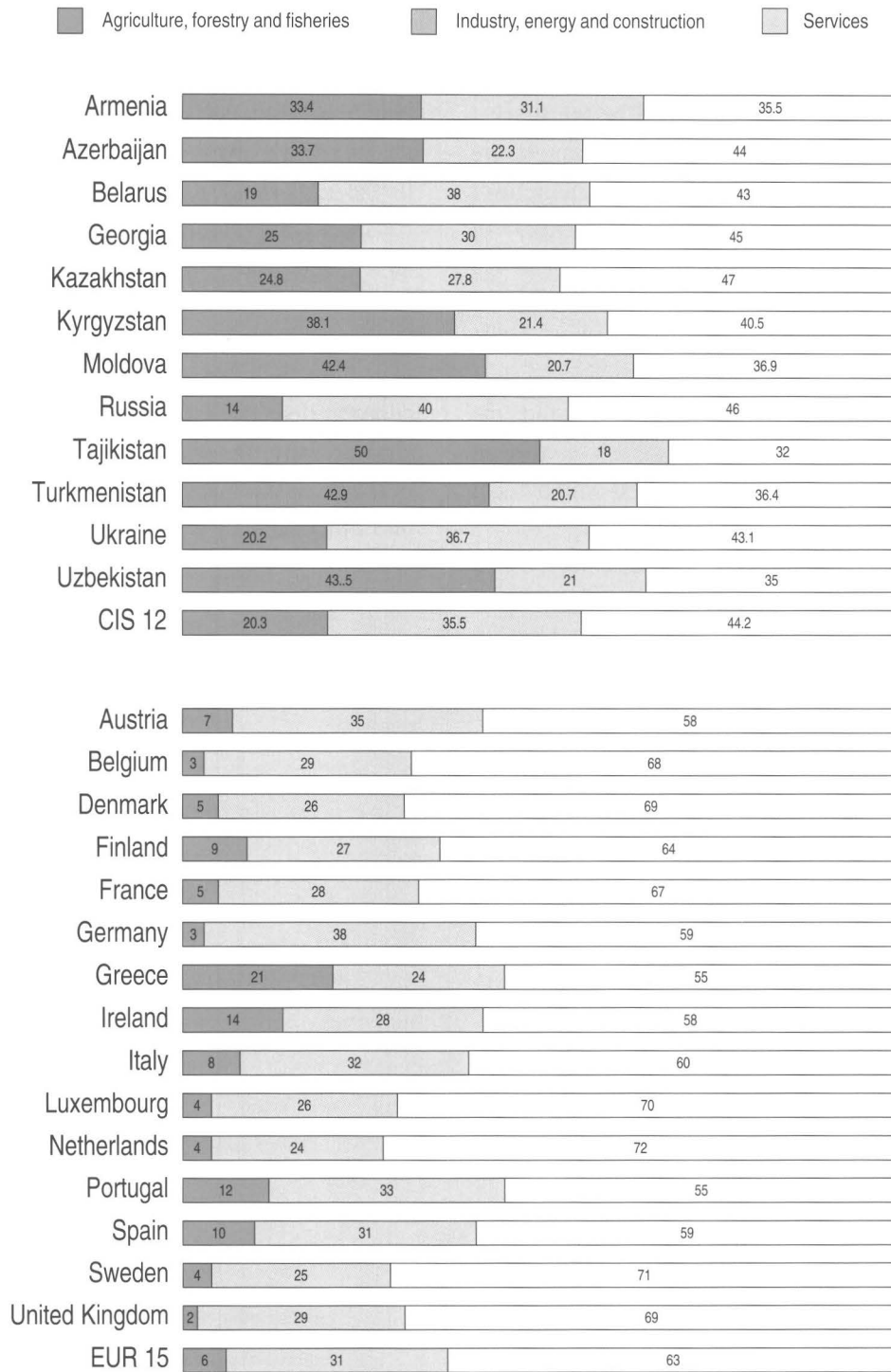
Population movement, including refugee flows, has created acute manpower scarcity in some regions and overcrowding in others. Skill shortages are particularly serious in Kyrgyzstan, Moldova, and Tajikistan. Kyrgyzstan alone lost 120 000 workers, mostly skilled, in 1993. Certain countries are now in critical need of teachers, medical staff, economists, and engineers. At the same time, many regions in Russia have an oversupply of these professionals and the concomitant problem of inadequate employment opportunities.

EU

Altogether, 147.5 million people had jobs in the EU in 1993. In practically all Member States, jobs were created mainly in the services sector, particularly in business services, hotels, banking and finance, but less in public administration (nonmarket services). In 1993 the services sector employed 63% of the total EU workforce, industry 31%, and agriculture only 6%.

The relative importance of these three sectors differs, however, in each Member State. For example, in Greece the agricultural sector (21%) is the biggest employer, while the services sector predominates in Luxembourg, the Netherlands, and Sweden (70–72% of all jobs). Industry has remained an important generator of employment in Austria (35%) and Germany (38%).

5.2. Employment by Economic Sector



1. 1990. 2. Excluding Georgia. 3. EUR 12.

5.3. Employment by Occupational Status

CIS

With the introduction and spread of the market economy across CIS countries, basic changes are underway in the allocation of manpower resources. During 1991–1994 the number of workers in the state sector has fallen from 74% to 55%. At the same time, employment in the private sector has risen rapidly, from 18% in 1991 to 32% in 1994, following the conversion of state enterprises into joint-stock companies and the creation of small businesses. Growth in foreign direct investment more than doubled employment in joint ventures to 0.5 million in 1994.

A new class of entrepreneurs has emerged as a result of changes in the legal, fiscal, and commercial environment. Employers, the self-

employed, and family workers now form 9% of the CIS workforce — still only half the equivalent in the EU. In the Central Asian and Caucasian republics, and Moldova, this category represents 13–23% of the workforce, the same as in the majority of EU countries. Armenia ranks first with 30%. Conversely, a high proportion of the workforce in Belarus, Russia, and Ukraine is still concentrated in factories and public administration; here, the self-employed are found mainly in the big economic centers and cities, where trade and other services sectors are expanding.

EU

In the EU, employees account for about 83% (122.4 million people) of civilian employment. They form over 70% of civilian employment in all EU countries (except Greece), but their share is as high as 90% in Germany and Sweden.

The share of self-employed is relatively high in southern Europe (47% in Greece, 29% in Italy, 26% in Portugal and Spain), where trade, tourism, and small-scale business and agriculture are major activities.

5.3. Employment by Occupational Status

1993

	Employers, self-employed and family workers ¹		Employees	
	(1 000)	% of civilian employment	(1 000)	% of civilian employment
Armenia	469	30.4	1 074	69.6
Azerbaijan	352	13.0	2 358	87.0
Belarus	203	4.2	4 621	95.8
Georgia	...	...	...	...
Kazakhstan	411	5.9	6 515	94.1
Kyrgyzstan	313	18.6	1 367	81.4
Moldova	234	13.9	1 454	86.1
Russia	5 895	8.3	64 957	91.7
Tajikistan	425	22.9	1 429	77.1
Turkmenistan	267	16.3	1 375	83.7
Ukraine	1 312	5.5	22 612	94.5
Uzbekistan	1 587	19.2	6 672	80.8
CIS 12²	11 468	9.1	114 434	90.9
Austria	474	13.0	3 072	87.0
Belgium	671	18.0	3 073	82.0
Denmark	276	11.0	2 291	89.0
Finland	325	15.0	1 838	85.0
France	3 094	14.0	18 813	86.0
Germany	3 731	10.0	32 380	90.0
Greece	1 736	47.0	1 980	53.0
Ireland	275	24.0	873	76.0
Italy	5 840	29.0	14 426	71.0
Luxembourg	18	11.0	146	89.0
Netherlands	781	12.0	5 859	88.0
Portugal	1 154	26.0	3 310	74.0
Spain	3 106	26.0	8 700	74.0
Sweden	407	10.0	3 778	90.0
United Kingdom	3 333	13.0	21 897	87.0
EUR 15	25 221	17.1	122 436	82.9

1. For CIS 12: persons engaged in agricultural farms, home agricultural production and individual labour activities (excluding members of cooperatives).

2. Excluding Georgia.

5.4. Unemployment

CIS

In 1991–1992 all CIS republics except Turkmenistan started registration of the unemployed. Since then, the number of (registered) unemployed has been growing and it had already exceeded 2 million by the end of 1994. For example, in Russia registrations rose from 16 000 in 1991 to 835 000 in 1993; they almost doubled one year later to 1.6 million. The average (registered) unemployment rate was 1%, but it varied widely from 0.2% in Kyrgyzstan and Kazakhstan to over 6% in Armenia. Although registrations show a virtual absence of jobless people in most countries, true unemployment figures are probably higher. The total number of unemployed throughout the countries, including persons seeking work without contacting the public employment agencies, was estimated at 7 million at the end of 1994 (5–6% of the workforce).

The proportion of young people under 30 among the unemployed is generally high: Belarus (55%), Kazakhstan (54%), Ukraine (49%), Azerbaijan (47%), Russia (37%). Women make up 60–70% of the unemployed in most CIS countries. One in three persons registered as unemployed had completed secondary or higher education.

The duration of unemployment is also increasing. In Russia, for example, the proportion of people without a job for 4–8 months increased from 24% to 30% during 1994 and those without a job for 8–12 months from 12% to 16%. However, the proportion represented by people without a job for less than 4 months decreased from 55% to 46%.

EU

Rising unemployment is a critical issue for national policymakers in the EU. In 1993, the number of unemployed reached a record level of 17 million (11% of the workforce). The countries with the highest rates were Spain (22%), Finland (17%), and Ireland (16%). Luxembourg (2%) and Austria (4%) had the lowest rates.

The composition of unemployment varies with the Member States. The proportion of young

people (under 25 years) among the unemployed is especially high in Italy (38%), Spain (31%), Ireland (29%), Greece, the United Kingdom, and Sweden (28% each). Below-average rates of under 20% were reported from Germany (14%), Denmark (17%), and Austria (19%). Female unemployment is particularly high in Portugal (58%), Belgium (56%), and Italy (53%).

5.4. Unemployment

1993
(at the end of the year)

	Total unemployment ¹ (1 000)	of which (%)		Unemployment rate ² (%)
		Female	Under age 25	
Armenia	102.6	62.9	20.1 ³	6.2
Azerbaijan	19.0	55.4	46.5 ⁵	0.7
Belarus	66.2	66.3	54.8 ⁵	1.4
Georgia	39.6	...	...	2.0
Kazakhstan	40.5	70.2	54.1 ⁶	0.6
Kyrgyzstan	2.9	69.7	31.3 ⁶	0.2
Moldova	14.1	62.8	44.3 ⁴	0.8
Russia	835.5	67.9	36.8 ⁶	1.2
Tajikistan	21.0	42.4	32.9 ³	1.1
Turkmenistan	...	...	...	...
Ukraine	83.9	74.7	48.5 ⁵	0.3
Uzbekistan	13.3	61.0	...	0.2
CIS 12	1 239.6⁷	67.0⁸	...	1.0⁷
Austria	238.0	44.0	19.0	4.0
Belgium	592.0	55.8	26.7	8.0
Denmark	350.0	51.3	16.8	11.0
Finland	467.0	23.0	23.0	17.0
France	3 400.0	48.9	25.4	11.2
Germany	2 514.0	42.6	14.0	6.0
Greece	205.0	50.1	27.6	9.0
Ireland	297.0	34.1	28.7	16.0
Italy	2 351.0	52.9	37.7	10.0
Luxembourg	4.3	43.0	30.0	2.0
Netherlands	480.0	41.3	23.8	6.0
Portugal	365.0	57.9	27.3	5.0
Spain	2 706.0	50.9	30.8	22.0
Sweden	339.0	29.0	28.0	8.0
United Kingdom	2 783.0	22.9	27.7	10.0
EUR 15	17 091.0	44.2	...	11.0

1. Registered unemployment.

2. For EUR 15: total unemployment rate based on Labour Force Survey.

3. Under age 22.

4. 18-30 years.

5. Under age 30.

6. Under age 29.

7. Excluding Turkmenistan.

8. Excluding Georgia and Turkmenistan.

Economy and Finance

Key Facts (1993)	CIS 12	EUR 15
GDP, in current prices (1 000 bn)	Rbl222.0	ECU5.9
Volume index of GDP 1994 (1990=100)	53.6*	104.4
GDP by economic sector (%)		
Agriculture, forestry, and fisheries	12.3 ²	2.6 ¹
Industry, energy and construction	44.4 ²	33.1 ¹
Services	43.3 ²	64.3 ¹
GDP by use (%)		
National private (household) consumption	45.0 ³	63.1 ¹
Government consumption	17.3 ³	17.1 ¹
Gross fixed capital formation (investment)	22.7 ³	19.1 ¹
Change in inventories	8.8 ³	-0.4 ¹
Trade balance (exports minus imports)	6.2 ³	1.1 ¹
GDP by cost structure (%)		
Compensation of employees	43.2 ³	52.2 ¹
Operating surplus and mixed income	32.3 ³	24.7 ¹
Consumption of fixed capital (depreciation)	16.7 ³	12.1 ¹
Taxes on production/imports (less subsidies)	7.8 ³	11.0 ¹
Price indices 1994 (in % to previous year)		
Industrial producer price index ⁴	922 ⁵	101.7*
Consumer price index	746*	103.1 ¹

1. EUR 12.

2. Excluding Tajikistan.

3. Excluding Tajikistan and Turkmenistan.

4. Industry and energy, but excluding construction.

5. Excluding Belarus, Georgia, and Ukraine.

6.1. Gross Domestic Product: Volume and Change

CIS

Between 1991 and 1994, the overall GDP of the CIS fell by almost 50%, mainly as a result of the decline in three countries, Kazakhstan, Russia, and Ukraine, which together account for about 90% of the total. In 1993, the Russian economy alone generated three-quarters of total GDP in the CIS. Ukraine came second with 12% of the CIS total, followed by Kazakhstan (5% of the CIS total).

During 1991–1994, GDP fell in practically all CIS countries, but at different rates. Eight countries, particularly Moldova and the three Caucasian countries — where the socio-economic situation has been most unstable — reported above-average falls (from –54% to –80%). In fact, GDP contracted most, i.e. by 80%, in Georgia. The decline was less severe in Belarus (–36%) and Uzbekistan (–17%).

EU

In 1993, the combined GDP generated by the 15 EU Member States almost reached ECU6000 billion, compared with that of the United States (ECU5350 billion) and Japan (ECU3600 billion). Germany accounted for about 28%, France for 18%, Italy and the United Kingdom for 14% each. In Germany, the statistical effect of unification was to increase GDP by 29% during 1990–1992.

In most EU Member States, annual GDP growth rates ranged between 1 and 2% during 1990–1994. Exceptions were Finland, Sweden, and the United Kingdom (until 1993), where stagnating domestic economies resulted in lower output levels. The highest growth rates between

1992 and 1994 were reported from Ireland (5% in 1992; 6% in 1994) and Luxembourg (6% in 1993).

In 1993, per capita GDP (in purchase power parities) was highest in Luxembourg (ECU25422). Several countries recorded income levels of ECU17000–18000 (Austria, Belgium, Denmark, France, Germany). The EU (EUR12) per capita average stood at ECU15835 (US\$18369) in 1993, an increase of about 5% compared with the previous year and double that of 1970 (ECU7673). The EU 1993 per capita average was lower than that of the United States (ECU22 542) and Japan (ECU19 011).

6.1. Gross Domestic Product: Volume and Change

1990-1993
(in current prices)

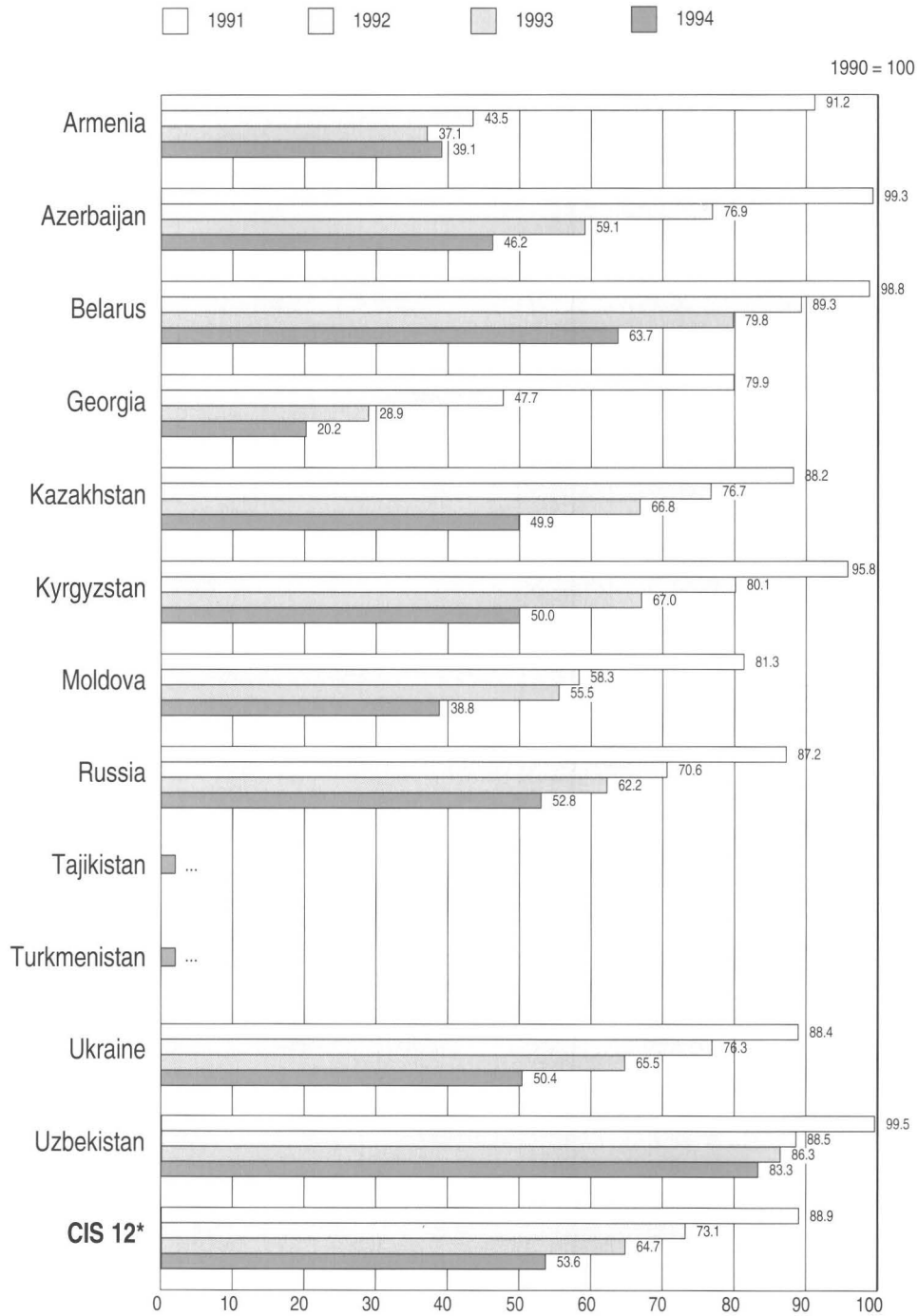
	1990	1991	1992	1993	1993	
	Russian roubles (bn)				National currency (bn)	National currency
Armenia	10.1	15.9	62.0	779.6	...	<i>Dram</i>
Azerbaijan	14.6	26.7	241.0	1 571	157.1	<i>Manat</i>
Belarus	42.7	85.9	914	4 849	10 376	<i>Belarus rouble</i>
Georgia	15.0	19.1	138.3	1 364	16 636	<i>Coupon</i>
Kazakhstan	46.4	81.0	1 048.5	10 608	26.8	<i>Tenge</i>
Kyrgyzstan	8.5	18.9	153.2	1 035	5.7	<i>Som</i>
Moldova	12.7	25.9	191.9	1 571	2.2	<i>Lei</i>
Russia	644.0	1 300	18 063	162 311	162 311	<i>Rouble</i>
Tajikistan	7.3	13.4	64.5	631.2	631.2	<i>Russian rouble</i>
Turkmenistan	7.6	14.7	284.2	5 326	10.7	<i>Manat</i>
Ukraine	167.1	299.4	5 032.7 ¹	26 847	116 724	<i>Karbovanec</i>
Uzbekistan	32.4	61.5	443.9	5 095.2	5 095.2	<i>Sum-coupon</i>
CIS 12	1 008.4	1 962.4	...	221 988		

	ECU (bn)				National currency (bn)	
Austria	124.7	133.6	143.9	155.5	2 117.8	<i>Schilling</i>
Belgium	151.4	159.7	170.7	180.0	7 292	<i>Belgian franc</i>
Denmark	101.7	104.6	109.3	115.5	892	<i>Krone</i>
Finland	106.2	98.1	82.1	71.5	478.6	<i>Markka</i>
France	941.5	970.0	1 021.9	1 068.6	7 378	<i>French franc</i>
Germany	1 182.2	1 391.5	1 522.3	1 631.5	2 865	<i>Mark</i>
Greece	64.4	70.4	73.8	76.7	17 276	<i>Drachma</i>
Ireland	35.3	36.7	39.4	40.4	29.8	<i>Irish pound</i>
Italy	862.1	932.3	943.0	847.3	1 597 677	<i>Lira</i>
Luxembourg	8.3	8.9	9.8	10.7	353.8	<i>Belgian franc</i>
Netherlands	223.3	234.6	247.5	264.0	584	<i>Gulden (florin)</i>
Portugal	52.9*	62.6*	73.4*	72.3	12 472	<i>Escudo</i>
Spain	387.8	427.3	445.3	408.4	62 257	<i>Peseta</i>
Sweden	180.8	193.5	191.4	159.2	1 442.1	<i>Krona</i>
United Kingdom	769.6	818.2	807.0	804.8	622	<i>Pound Sterling</i>
EUR 15	5 192.2	5 642.0	5 880.8	5 906.4		

1. In billion national currency (karbovanec).

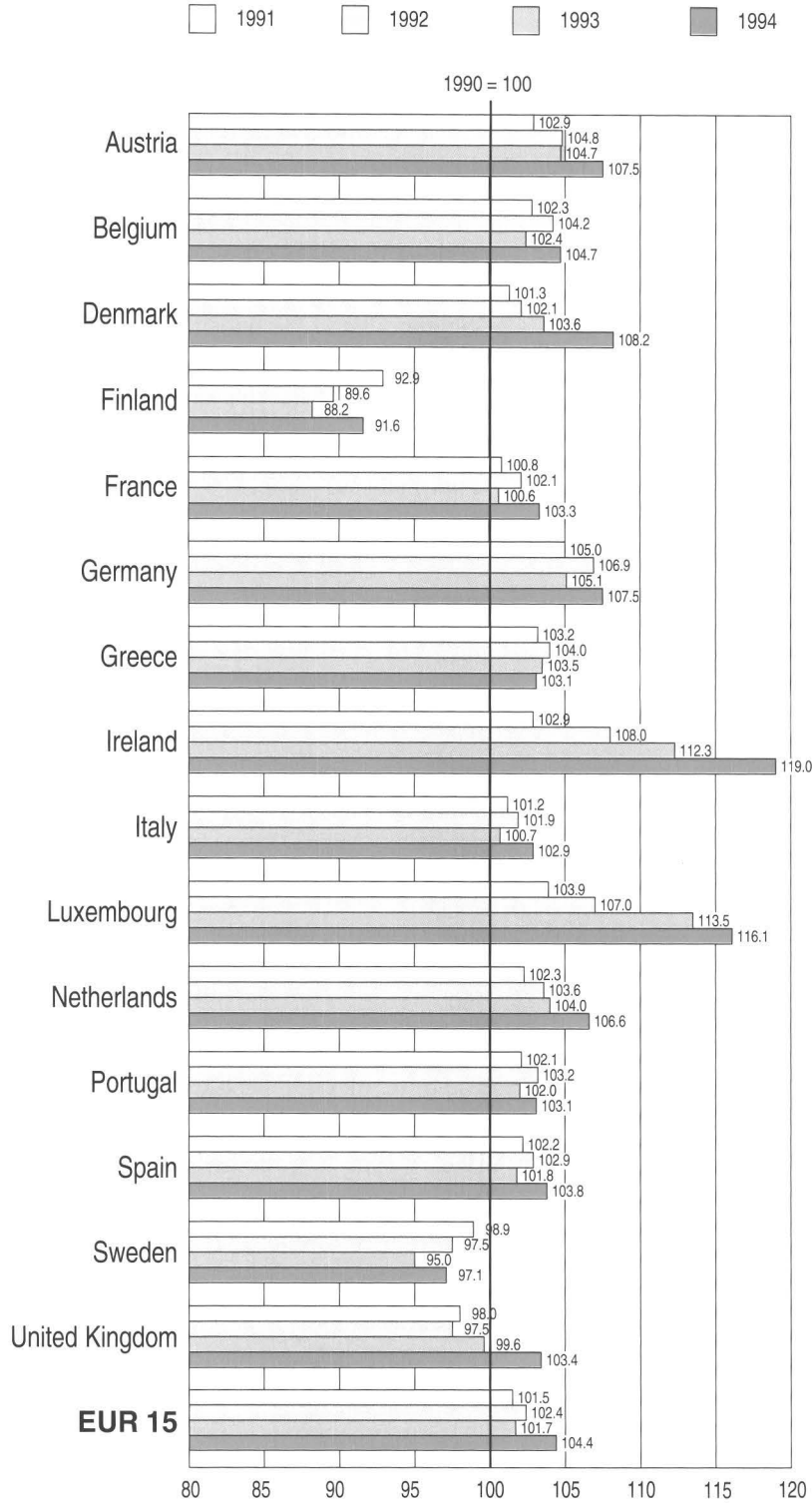
6.1. Gross Domestic Product: Volume and Change

1991-1994
(in constant prices)



6.1. Gross Domestic Product: Volume and Change

1991-1994
(in constant prices)



6.2. Gross Value Added by Main Economic Sectors

CIS

CIS economies are characterized by a relatively high contribution to GDP of agriculture, including forestry and fisheries (CIS average of 12% compared with under 3% for the EU), and of industry, including construction and energy (CIS average of 44% compared with 33% for the EU). Services account for 43% for the CIS as a whole, which is 21 percentage points lower than the EU average. But services have already reached a relatively high share in GDP in Azerbaijan, Belarus, Kazakhstan, and Russia (over 40% of GDP), and their share is increasing. In all CIS countries, the share of non-market services is inferior to that of market services as financial,

insurance and commercial activities are expanding during transition to market economy.

Agriculture prevails in Georgia (55% of GDP), Moldova (38%), and Kyrgyzstan (36%). In Belarus, Turkmenistan, and Ukraine, it accounts for less than 20%, which still exceeds the level in Greece, the country with the highest share of agriculture in the EU. An expanding gas sector has raised the share of industry to 62% in Turkmenistan (62%). Ukraine and Russia follow, with 49% and 44%, respectively. The share of industry is lowest in Azerbaijan (32%) and Georgia (20%).

EU

Differences between Member States in the formation of GDP are slowly diminishing with the convergence of their economies. In general, the share of agriculture has declined across the EU as national economies have been diversifying towards new industries and services. The most significant drop for agriculture occurred in Ireland (from 15.6% in 1970 to 7.6% in 1992), Spain (from 10.7% to 3.8%), and France (from 7.3% to 2.9%). Greece is an exception; here, agriculture still accounted for 17% of total value-added in 1992, which was only 1.2 points lower than in 1970. Germany (1.2%), the United Kingdom

(1.5%), Luxembourg (1.7%), and Belgium (1.8%) had the lowest shares for agriculture in 1992.

The average contribution of industry is around one-third of GDP in the EU, but this share has also been decreasing over the past 20 years. In 1992, it ranged from 27% in Denmark to 44% in Austria. The diminishing role of agriculture and industry has been offset by an expansion of the services sector. Services exceed two-thirds of GDP in countries like Belgium, Denmark, and France; their share is lower in Austria (52.7% in 1992), Ireland (54.4%), and Greece (55.6%).

6.2. Gross Value Added by Main Economic Sectors

1992-1993
(in current prices)

	Year	Gross value added	of which (%)				
			Agriculture, forestry and fishing	Industry, energy and construction ¹	Services		
					Total	market	non-market
Armenia	1992	100	30.3	38.9	30.8	18.3	12.5
Azerbaijan	1993	100	26.8	32.0	41.2	23.9	17.3
Belarus	1993	100	17.3	39.3	43.4	31.7	11.7
Georgia	1992	100	55.1	20.0	24.9	20.3	4.6
Kazakhstan	1993	100	11.9	41.8	46.3	23.5	22.8
Kyrgyzstan	1993	100	36.1	32.6	31.3	24.4	6.9
Moldova	1992	100	37.5	34.7	27.8	17.4	10.4
Russia	1993	100	9.2	44.1	46.7	34.1	12.6
Tajikistan	...	...	...	...	...	...	...
Turkmenistan	1992	100	17.7	61.8	20.5	12.7*	7.8*
Ukraine	1992	100	19.6	49.4	31.0	20.3	10.7
Uzbekistan	1993	100	29.9	34.0	36.1	21.7	14.4
CIS 12³	1993*	100	12.3	44.4	43.3	30.5	12.8
Austria	1992	100	3.4	43.9	52.7	...	...
Belgium	1992	100	1.7	30.5	67.8	54.4	13.4
Denmark	1992	100	3.5	26.6	69.8	47.1	22.7
Finland	1992	100	6.7	38.0	55.3	...	...
France	1992	100	2.9	29.7	67.4	50.5	16.9
Germany	1992	100	1.2	37.6	61.3	48.0	13.3
Greece	1992	100	17.0	27.3	55.6	39.5	16.1
Ireland	1992	100	7.6	38.0	54.4	38.6	15.8
Italy	1992	100	3.1	31.8	65.2	51.2	14.0
Luxembourg	1992	100	1.5	31.1	67.5	52.7	14.8
Netherlands	1992	100	3.8	29.8	66.4	55.6	10.8
Portugal	1992	100	5.9	36.5	57.6	43.8	13.8
Spain	1992	100	3.8	34.0	62.2	47.1	15.1
Sweden	1992	100	3.1	40.4	56.5	...	...
United Kingdom	1992	100	1.5	33.1	65.4	49.5	15.9
EUR 15²	1992	100	2.6	33.1	64.3	49.6	14.7

1. For CIS 12: including other branches of material production.

2. EUR 12.

3. Excluding Tajikistan.

CIS

Household consumption, as a share of GDP, is on average lower in the CIS than in the EU. In 1992/1993 it was above the CIS average in Azerbaijan and Kyrgyzstan (66–67%), Belarus (56%), Uzbekistan (58%), and Ukraine (48%); the figure was lower for Kazakhstan, Moldova, and Russia (42–44%). Household consumption exceeded GDP in Armenia and Georgia, where a difficult economic situation has led to higher imports and destocking. Government expenditure is particularly high in Uzbekistan (25% of GDP), owing to relatively high spending on public services such as education and health.

In 1993 gross fixed capital formation (GFCF) contributed 15–25% in most CIS countries,

similar to the EU. But a continuing decline of this measure was observed in recent years in most countries, reflecting a reduction in investment activities. The lowest share was reported from Azerbaijan (5%), where—like in Armenia and Uzbekistan—substantial destocking was recorded. By contrast, GFCF was appreciably high in Moldova (44%), Kazakhstan (27%), and Kyrgyzstan (17%), where high inventories built up owing to lower demand and trade between companies throughout the CIS. Three CIS countries (Azerbaijan, Russia, and Ukraine) had a positive trade balance in 1993.

EU

Household consumption, which comprises expenditure on consumer goods and services, represents between 53% of GDP in Denmark and 68% in Portugal. Government spending is relatively high in the three Scandinavian countries (24–28%), suggesting an important role of the state in the provision of basic services such as health and education. Government intervention is less significant in Luxembourg (13%), Belgium, Greece, and the Netherlands (about 15% each). The share of public expenditure has been declining

slightly since the late 1980s; this trend may continue, as efforts to curb state spending and to deregulate the economy are made at national and EU levels.

Gross fixed capital formation — which reflects investment activities — constitutes a relatively high proportion of GDP in Portugal (26%), Austria and Luxembourg (both 24%). A majority of EU countries (except Greece, Portugal, and to a lesser extent, Spain and the United Kingdom) recorded a trade surplus in 1993.

6.3. Use of GDP

1992-1993
(in current prices)

	Year	GDP	of which (%)				
			Final consumption expenditure		Gross capital formation		Trade balance
			National private consumption	Government consumption	Gross fixed formation	Change in inventories ¹	
Armenia	1992	100	102.5	18.8	18.4	-16.6	-23.1
Azerbaijan	1992	100	67.1	18.7	4.7	-23.7	33.2
Belarus	1993	100	55.5	18.5	29.4	6.8	-10.2
Georgia	1992	100	108.8	15.6	17.6	7.6	-49.6
Kazakhstan	1993	100	44.0	13.1	22.4	26.9	-6.4
Kyrgyzstan	1993	100	66.3	11.2	12.2	17.4	-7.1
Moldova	1992	100	41.5	16.0	15.7	44.1	-17.3
Russia	1993	100	43.6	17.2	22.8	8.6	7.8
Tajikistan	...	...	...	...	...	...	...
Turkmenistan	...	...	...	...	...	...	...
Ukraine	1993	100	48.0	16.0	24.3	12.0	-0.3
Uzbekistan	1993	100	57.5	24.6	25.2	-10.5	3.2
CIS 12²	1993	100	45.0	17.3	22.7	8.8	6.2
Austria	1993	100	55.2	19.2	24.1	0.4	1.1
Belgium	1993	100	62.0	15.3	17.8	-0.2	5.1
Denmark	1993	100	52.6	25.9	14.8	-1.1	7.8
Finland	1993	100	56.8	23.4	14.9	-0.6	5.5
France	1993	100	61.5	19.5	19.1	-1.4	1.4
Germany	1993	100	64.8	12.9	22.2	-0.2	0.3
Greece	1993	100	76.7	15.4	20.9	-0.3	-12.6
Ireland	1993	100	56.0	16.0	14.9	-0.6	13.7
Italy	1993	100	61.9	17.7	17.1	-0.2	3.5
Luxembourg	1993	100	54.7	12.7	24.4	2.1	6.1
Netherlands	1993	100	60.9	14.6	19.7	-0.2	5.0
Portugal	1993	100	67.6	17.7	25.8	0.7	-11.8
Spain	1993	100	63.3	17.5	19.8	0.1	-0.7
Sweden	1993	100	54.9	28.0	14.3	-0.8	3.6
United Kingdom	1993	100	64.2	22.0	15.1	0.0	-1.3
EUR 15³	1993	100	63.1	17.1	19.1	-0.4	1.1

1. For CIS 12 : including net acquisition of valuables.

2. Excluding Tajikistan and Turkmenistan.

3. EUR 12.

6.4. Cost Structure of GDP

CIS

In 1993 employee compensation (wages, salaries, and social contributions) accounted for 43% of GDP in the CIS, which was 9 percentage points lower than the EU average. It appears that this is the result of relatively low average wages and salaries in CIS countries. Operating surplus and mixed income has a high share in Georgia (61%), Kyrgyzstan (58%), and Armenia (49%), where, increasingly, the working population is making use of the opportunities offered by the emerging private sector.

The tax burden on producers and importers can be quite different from one country to

another. The ratio of net taxes (on production and imports) to GDP is proportionately high in Armenia, Belarus, Kazakhstan, Moldova, and Russia (8–12%). Uzbekistan is the only country, where subsidies exceeded taxes in 1992. In Belarus, Russia, and Ukraine, consumption of fixed capital (depreciation) amounted to almost 20% of GDP in 1992/1993, but it was between 2% and 10% in the other countries. The discrepancy may be due to differences in the methods for evaluating fixed assets.

EU

A glance at the income measure shows a strong contribution of employee compensation, amounting to over half of GDP in a majority of Member States (average EU share: 52% in 1992). Sweden tops the list with a share of almost 60%, followed by Germany, the United Kingdom and Luxembourg (56% each). The ratio employee compensation to GDP is a rough structural indicator for wage indexation decisions, together with the consumer price index (CPI), which allows to take into account price developments and to neutralize the effect of inflation.

Net operating surplus — an approximation of company profits — represents above-average shares in national income in the Mediterranean countries: Greece (51%), Portugal (38%), Spain (35%), and Italy (34%). In these countries, an increasing part of the workforce seems to be self-employed and running their own businesses. In 1992/1993 the share of employee compensation was far below 50% of national GDP in these four countries; in Greece it did not even attain one-third of GDP.

6.4. Cost Structure of GDP

1992-1993

(in current prices)

Year	GDP	of which (%)				
		Compensation of employees	Taxes on production and imports (minus subsidies)	Consumption of fixed capital	Operating surplus and mixed income (net)	
Armenia	1992	100	38.7	8.5	3.5	49.3
Azerbaijan	1993	100	54.2	6.2	4.0	35.6
Belarus	1993	100	49.3	9.3	19.8	21.6
Georgia	1992	100	27.4	1.8	9.8	61.0
Kazakhstan	1993	100	41.8	8.2	6.0	44.0
Kyrgyzstan	1993	100	32.6	6.3	2.7	58.4
Moldova	1992	100	52.4	11.9	1.7	34.0
Russia	1993	100	41.2	9.1	17.9	31.8
Tajikistan	...	...	...	...	...	...
Turkmenistan	...	...	...	...	...	...
Ukraine	1992	100	51.1	1.0	18.8	29.1
Uzbekistan	1992	100	64.6	-0.6	2.8	33.2
CIS 12²	1993*	100	43.2	7.8	16.7	32.3
Austria	1993	100	53.6	13.0	12.8	20.6
Belgium	1993	100	54.3	9.7	9.6	26.4
Denmark	1993	100	54.0	13.6	9.4	23.0
Finland	1993	100	54.8	11.5	17.5	16.2
France	1993	100	52.7	12.2	13.3	21.8
Germany	1993	100	56.3	10.9	13.5	19.3
Greece	1993	100	31.3	10.3	7.2	51.2
Ireland	1993	100	49.8	9.9	9.4	30.8
Italy	1993	100	44.0	10.0	12.3	33.7
Luxembourg	1993	100	56.0	14.0	8.9	21.1
Netherlands*	1993	100	53.6	10.1	11.6	24.7
Portugal*	1993	100	46.1	11.6	4.0	38.3
Spain	1993	100	46.3	7.4	11.4	34.9
Sweden	1993	100	59.5	10.0	14.1	16.4
United Kingdom	1993	100	56.3	13.0	10.4	20.3
EUR 15¹	1993	100	52.2	11.0	12.1	24.7

1. EUR 12.

2. Excluding Tajikistan and Turkmenistan.

CIS

With economic transformation, the financial sector is undergoing major changes. The number of commercial banks has increased dramatically, foreign exchange and securities markets have been formed, and new currencies have been introduced in all countries. However, the surge in money supply, depreciation of national currencies, high budget deficits, and internal and foreign debt are all symptoms of a precarious financial situation. Transition has also led to a disruption of payment and clearing mechanisms between CIS countries.

Nation budgets in CIS countries are characterized by high deficits, which are a main cause of inflation. Budget deficits (in % of GDP) ranged from 1.2% (Armenia) to 7.1% (Azerbaijan)

in 1993, while preliminary figures for 1994 already indicate a range between 4.7% (Moldova) and 10% (Azerbaijan and Russia).

On 1 January 1995, total foreign debt for the CIS was estimated at US\$24 billion. Russia accounted for almost half (US\$10 billion), in addition to the debt of US\$120 billion inherited from the former Soviet Union. Debts of other CIS countries to Russia amounted to US\$5.7 billion.

The Agreement on Economic Union in the CIS provides for the establishment of monetary and payment unions, the objectives of which is to establish financial stability and to develop clearing mechanisms for interstate settlements.

EU

1 January 1994 marked the beginning of the second phase of the Economic and Monetary Union (EMU), as scheduled in the Union Treaty (Title IV). EU governments have since then sought to reduce their budget deficits to facilitate the introduction of a common currency. Member States therefore cooperate to control inflation and to avoid financial instability. Countries facing currency crises can avail of special loan facilities and mutual assistance through central bank interventions under the exchange rate mechanism (ERM).

Monetary and fiscal convergence is a prerequisite to join EMU. Strict ceilings have been set for annual budget deficits (3% of GDP) and overall government debt (60% of GDP). Both the European Monetary Institute (in cooperation with

the central banks of the Member States), and the EU Commission were given the responsibility of independently reporting to the Council by 1996 about the development of the convergence criteria in the EU.

In 1993 most Member States had budget deficits under 10% of GDP, with the exception of Sweden (-13.4% of GDP) and Greece (-13.2%). Luxembourg was the only country that presented a budget surplus (+1.7%). Ireland, Germany, and the Netherlands reported relatively low deficits (2-3%), which came close to the established convergence criteria. The overall debt burden is most significant in Belgium (137% of GDP), Italy (119%), and Greece (115%); in all three cases, government debt exceeds national income.

6.5. Public Finance

1993

(in bn units of national currency)

State budget:

National currency		Revenue ^{2,4}	Expenditure ⁴	Balance ⁴	Budget deficit/ surplus (% to GDP)
Armenia ¹	<i>Dram</i>	293.8	303.4	-9.6	-1.2
Azerbaijan	<i>Manat</i>	53.6	64.8	-11.2	-7.1
Belarus	<i>Belarus rouble</i>	3 623	4 168	-545	-5.3
Georgia	<i>Coupon</i>	...	...	...	...
Kazakhstan	<i>Tenge</i>	8.0	7.5	0.5	1.8
Kyrgyzstan	<i>Som</i>	1.3	1.3	0.0	0.6
Moldova	<i>Lei</i>	0.4	0.5	-0.1	-6.2
Russia	<i>Rouble</i>	49 730	57 674	-7 944	-4.9
Tajikistan	<i>Russian rouble</i>	407.4	336.4	71.0 ³	11.3 ³
Turkmenistan	<i>Manat</i>	2.0	1.9	0.1	0.5
Ukraine	<i>Karbovanec</i>	49 622	57 249	-7 627	-6.5
Uzbekistan	<i>Sum-coupon</i>	1 843	1 995	-152	-3.0
CIS 12					
Austria	<i>Schilling</i>	...	...	...	-4.0
Belgium	<i>Belgian franc</i>	3 236	3 732	-496	-6.6
Denmark	<i>Krone</i>	466	486	-20	-4.5
Finland	<i>Markka</i>	...	...	...	-7.8
France	<i>French franc</i>	3 144	3 412	-268	-5.8
Germany	<i>Mark</i>	1 342	1 420	-78	-3.3
Greece	<i>Drachma</i>	...	...	...	-13.2
Ireland	<i>Irish pound</i>	11.3 ⁵	11.8 ⁵	-0.5 ⁵	-2.4
Italy	<i>Lira</i>	624 665	767 923	-143 258	-9.5
Luxembourg	<i>Belgian franc</i>	...	...	...	1.7
Netherlands	<i>Gulden (florin)</i>	285	305	-20	-3.3
Portugal	<i>Escudo</i>	2 870 ⁶	3 059 ⁶	-189 ⁶	-7.1
Spain	<i>Peseta</i>	21 125 ⁵	23 824 ⁵	-2 699 ⁵	-7.5
Sweden	<i>Krona</i>	...	...	...	-13.4
United Kingdom	<i>Pound sterling</i>	209.6	245.8	-36.2	-7.9
EUR 15					

1. In Russian rouble.

2. For CIS 12: including credit facility provided by the National Bank.

3. If National Bank loans are excluded, a deficit of 158.7 billion (25.1% of GDP) is recorded.

4. For EUR15 : 1992.

5. 1991.

6. 1989.

6.6. Industrial Producer Price Index

CIS

The transition to a market economy was accompanied by a steep rise in the industrial producer price index. It started with a moderate increase during 1991 (between 2.2 times in Armenia and Ukraine and 3.1 times in Turkmenistan). In 1992, however, it started growing exponentially, up to 21 times for the CIS as a whole, but with noticeable differences depending on the countries: 25 times for Belarus, Kazakhstan, and Ukraine; 10–14 times for Armenia, Moldova, Tajikistan, Turkmenistan, and Uzbekistan. High increases are linked to radical liberalization measures, while lower increases can be attributed to price controls and subsidies for certain products (especially fuels) and services. During 1991–1994 the highest price increases were reported from Kazakhstan (24 514 times), and

the lowest from Kyrgyzstan (1400 times) and Tajikistan (1890 times).

Changes in the indices for the same products varied in the different countries. In 1993/1994 producer prices for fuels in Russia were 5 times lower than in Kazakhstan and 1.5 times lower than in Uzbekistan. Price increases in Russia's capital goods industries were also lower — 4 times compared with Kazakhstan, 2.8 times compared with Uzbekistan, and 2.2 times compared with Azerbaijan. But the price increases in Kyrgyzstan were 2 times lower than in Russia. Price increases in the food industry were lowest in Kyrgyzstan and Tajikistan (3.7–3.8 times), but much higher in Kazakhstan (7 times the level of Kyrgyzstan and Tajikistan), Uzbekistan (4 times higher than in the two countries), and Russia (25% higher).

EU

As the forerunner of the wholesale and consumer price indices, the index of producer prices can provide a valuable measure to anticipate trends in domestic (not imported) inflation.

Most EU countries reported relatively stable rates during 1991–1994, except for Greece where the index had climbed to 117 in 1991, but then

gradually dropped to a level of 107 in 1994 (1993 = 100).

Five countries reported intermittent falls: Belgium (1991–1993), Denmark (1992–1993), Finland (1991), France (1993), Luxembourg (1991–1993), and the Netherlands (1992–1993).

6.6. Industrial Producer Price Index

1991-1994
(in % to previous year)¹

	1991	1992	1993	1994
Armenia	220	1 047	992	4 814
Azerbaijan	235	1 403	1 141	1 158
Belarus	250	2 465	2 515	...
Georgia	...	...	...	...
Kazakhstan	293	2 469	1 442	2 350
Kyrgyzstan	260	1 764	931	328
Moldova	230	1 311	1 178	994
Russia	238	2 049	991	511
Tajikistan	263	1 423	1 180	428
Turkmenistan	311	1 094	1 710	1 011
Ukraine	222	2 484	...	...
Uzbekistan	247	1 396	1 219	1 166
CIS 12	238²	2 110²	1 132³	922⁴
Austria	...	...	...	...
Belgium	98.9	99.8	99.0	101.3
Denmark	101.1	99.0	98.9	100.7
Finland	99.7	101.3	102.8	101.8
France	101.0	100.6	99.0	100.5
Germany	102.4	101.4	100.2	100.7
Greece	117.1	112.1	111.4	107.2
Ireland	101.1	102.1	102.3	101.9
Italy	103.3	101.9	103.7	103.8
Luxembourg	97.4	97.4	98.7	101.5
Netherlands	102.2	99.6	98.4	100.8
Portugal	...	...	...	...
Spain	101.5	101.4	102.4	104.3
Sweden	...	...	...	...
United Kingdom	104.5	102.0	103.4	101.8
EUR 15*	102.5	101.4	101.3	101.7

1. Total industry including energy and excluding construction.

2. Excluding Georgia.

3. Excluding Georgia and Ukraine.

4. Excluding Belarus, Georgia and Ukraine.

6.7. Consumer Price Index

CIS

Prices for essential consumer goods and services have soared in all CIS countries since the dissolution of the USSR in 1991. They practically doubled after the retail sector was first deregulated in April 1991. Inflation developed differently, however, across the CIS because of differences in price policies and degree of liberalization.

Kazakhstan, Russia, and Ukraine had among the highest inflation rates in 1992. In 1993 the situation reached a critical point in Armenia, Ukraine and Tajikistan. Countries with high inflation in 1994 were

Armenia, Belarus, Kazakhstan, and Turkmenistan, while inflation increased more slowly in Kyrgyzstan, Moldova, Russia, Tajikistan, and Ukraine.

The average price index for the CIS was 1604 times higher in 1994 than in 1991 (compared with 7.5 times during 1994/1993). High energy prices and increased imports, caused by a slump in the light and food industries, were the main causes of inflation. Price hikes affected foodstuffs more than non-food items. The price index was highest for market services.

EU

Most EU governments succeeded in checking inflation through appropriate fiscal and monetary measures. In most countries, consumer prices rose by 2–4% per annum during 1991–1994.

The 1994/1993 increase was most significant in Greece (11%), followed by Portugal, Sweden, and Spain (about 5% each). But the levels have declined in all countries since 1991. Over half of the Member States reported rates under 3%:

Belgium, Denmark, France, Germany, Ireland, Luxembourg, Netherlands, and United Kingdom.

Prices for food and clothing, and footwear developed in a similar direction and practically followed the overall index. Exceptions were Luxembourg, where a deflation was recorded for food items, and the Netherlands, which reported price falls for clothing and footwear.

6.7. Consumer Price Index

1991-1994
(in % of previous year)

	1991	1992	1993	1994		
				Total	Food	Non-food ³
Armenia	240	...	10 978 ¹	5 062	4 326	6 573
Azerbaijan	212	1 012	1 229	1 764	1 793 ²	1 186
Belarus	199	1 071	1 290	2 321	2 584	2 018
Georgia	179	...	...	...	...	...
Kazakhstan	179	1 615	1 758	1 977	1 948 ²	1 671
Kyrgyzstan	213	1 189	1 294	378	315	292
Moldova	214	1 209	1 284	586	553 ²	530
Russia	200	2 609 ¹	940 ¹	315 ¹	333 ¹	269 ¹
Tajikistan	213	1 007	2 236	101 ¹	84 ¹	113 ¹
Turkmenistan	212	870	1 731	2 814*	1 949*	3 490*
Ukraine	194	2 100 ¹	10 256 ¹	501 ¹	473 ¹	473 ¹
Uzbekistan	197	515	1 332	1 650*	1 354*	1 029*
CIS 12*	201	1 390	1 548	746	752	615
Austria	103.4	104.0	104.0	...	...	...
Belgium	103.2	102.4	102.7	102.3	101.7	101.8
Denmark	102.4	102.1	101.3	101.9	102.9	101.0
Finland	104.2	102.9	102.2	...	...	...
France	103.2	102.3	102.1	101.8	101.5	100.4
Germany	103.5	104.0	104.2	102.9	101.4	101.3
Greece	119.5	115.8	114.4	110.9	112.9	110.5
Ireland	103.1	103.1	101.4	102.3	103.4	101.3
Italy	106.2	105.2	104.4	104.0	103.5	103.1
Luxembourg	103.1	103.1	103.6	102.2	99.4	101.9
Netherlands	104.0	103.8	102.1	102.5	101.8	99.0
Portugal	110.9	109.0	106.4	105.2	103.7	104.1
Spain	106.0	105.9	104.6	104.7	105.6	102.5
Sweden	109.4	102.2	104.7	...	...	...
United Kingdom	105.9	103.8	101.6	102.4	101.1	101.0
EUR 15	105.1	104.2	103.5	103.1⁴	102.7⁴	102.2⁴

1. December in % to December.

2. Including alcoholic drinks.

3. For EUR 15: clothing and footwear including repair.

4. EUR 12.

Chapter 7

Agriculture, Forestry and Fisheries

Key Facts (1993)	CIS 12	EUR 15
Share in GDP (%)	12.3 ²	2.6 ¹
Share in total employment (%)	20.0 ³	6.0 ¹
Utilized agricultural area (mn ha)	524.6 [*]	137.8 [*]
Arable land (%)	41	55
Land under permanent crops (%)	1	8
Permanent grassland (%)	58	37
Crop production (mn t, 1991–1993 average)		
Grain	171.0	178.5 [*]
Pulses	5.9	4.8 [*]
Potatoes	69.7	48.3 [*]
Vegetables	24.7	49.3 [*]
Fruit	11.9	22.8 [*]
Sugar beet	62.5	114.2 [*]
Cotton	7.0	1.0 [*]
Livestock (mn head)		
Cattle	98.4	84.1
Pigs	52.8	110.8
Sheep and goats	119.3	111.3
Forest area ⁴ (mn ha)	808.0	96.5
Timber removals (mn m ³)	189.9	244.3 ⁵
Fish catch (mn t)	4.9	7.2 ⁶

1. EUR 12.

2. Excluding Tajikistan.

3. Excluding Georgia.

4. For CIS 12: 1988; for EUR 15: 1990.

5. 1991.

6. 1992.

CIS

For most CIS countries, agriculture is a vital economic sector, which usually accounts for a more significant share in GDP and total employment than in the EU. The shares are 55% (GDP) and 25% (employment) in Georgia, 36% (GDP) and 38% (employment) in Kyrgyzstan, 38% (GDP) and 42% (employment) in Moldova, 30% (GDP) and 44% (employment) in Uzbekistan, 27% (GDP) and 34% (employment) in Azerbaijan, and 30% (GDP) and 33% (employment) in Armenia. However, in Russia and Kazakhstan, agriculture generates less than 12% and about 9% of GDP, respectively; the shares in employment are 25% (Kazakhstan) and 14% (Russia).

Since the early 1990s, agricultural production has been declining across the CIS; during 1990–1993 it fell by an average 19%. Output losses were most significant in Belarus, Kazakhstan, and Moldova.

New forms of management and organization of agricultural production have been introduced by now in practically all CIS countries. The number of private farms and individual landholdings has increased significantly. Altogether, 639 000 farms were registered in the CIS as of end 1993; their average size was 31 ha. In only one year (1993) their number increased by 130 000.

During 1990–1993, private farms increased their share in total production of many commodities: potatoes (from 59% to 82%), vegetables (from 30% to 61%), meat (from 27% to 42%), milk (from 28% to 41%), and eggs (from 27% to 35%). But the increase in production reported by the private sector could not reverse the overall trend of decline in agricultural output.

7.1. Role of Agriculture in the Economy

EU

Right from the inception of the European Community, national governments started adopting measures to increase agricultural production and to modernize the sector. The Community was then dependent on overseas imports especially from the United States, Canada and Latin America. A Common Agricultural Policy (CAP) was launched in 1962 and given the highest priority and budget allocation among all other Community policies (Union Treaty, Title II).

More than three decades of CAP have led to a number of tangible achievements at Community level: self-sufficiency in food production; high productivity levels (production, transport and logistics); better living standards for Europe's farmers; assured supply of food products at reasonable prices for consumers. As agricultural output has now stabilized at a high level, less than half of the overall EU budget is needed to finance the CAP compared with over 75% in the 1970s.

The EU produces more than it consumes for almost all the commodities. High output and price guarantees have led to large surpluses of products

like milk and butter. The Union frequently had to sell off the surpluses in the world market. In 1992 the Community adopted a radical reform of the CAP by abolishing fixed price mechanisms and, instead, introducing direct assistance to farmers. The aim was to adjust production to demand, to promote agriculture in backward regions, and to reduce the burden on the environment. In 1993, part of the agricultural area "frozen" to cut surplus production.

Higher productivity has been accompanied by a decline in the share of agriculture in total EU employment: from 11.3% in 1973 to 5.5% in 1993. However, in Greece, the share is still 15 percentage points higher than the EU average; other countries above the average are Ireland (14%) and Portugal (12%). Countries where agriculture generates less than 5% of employment are Belgium, Germany, Luxembourg, the Netherlands, Sweden, and the United Kingdom.

The share of agriculture in overall GDP of the EU decreased from about 5% in 1973 to 2% in 1993; it was highest in Greece (17%) and lowest in Germany (1.2%).

7.2. Agricultural Area

CIS

During 1990–1993 total agricultural area in the CIS diminished by 5% to around 525 million ha. A higher proportion of agricultural area is used as permanent grassland (58%) than as arable land (41%), unlike the EU where arable land represents

55%. In the Central Asian countries, the proportion of permanent grassland reaches 77–95%. However, in Belarus, Moldova, and Russia, two-thirds of the agricultural area is arable (in Ukraine, over 80%).

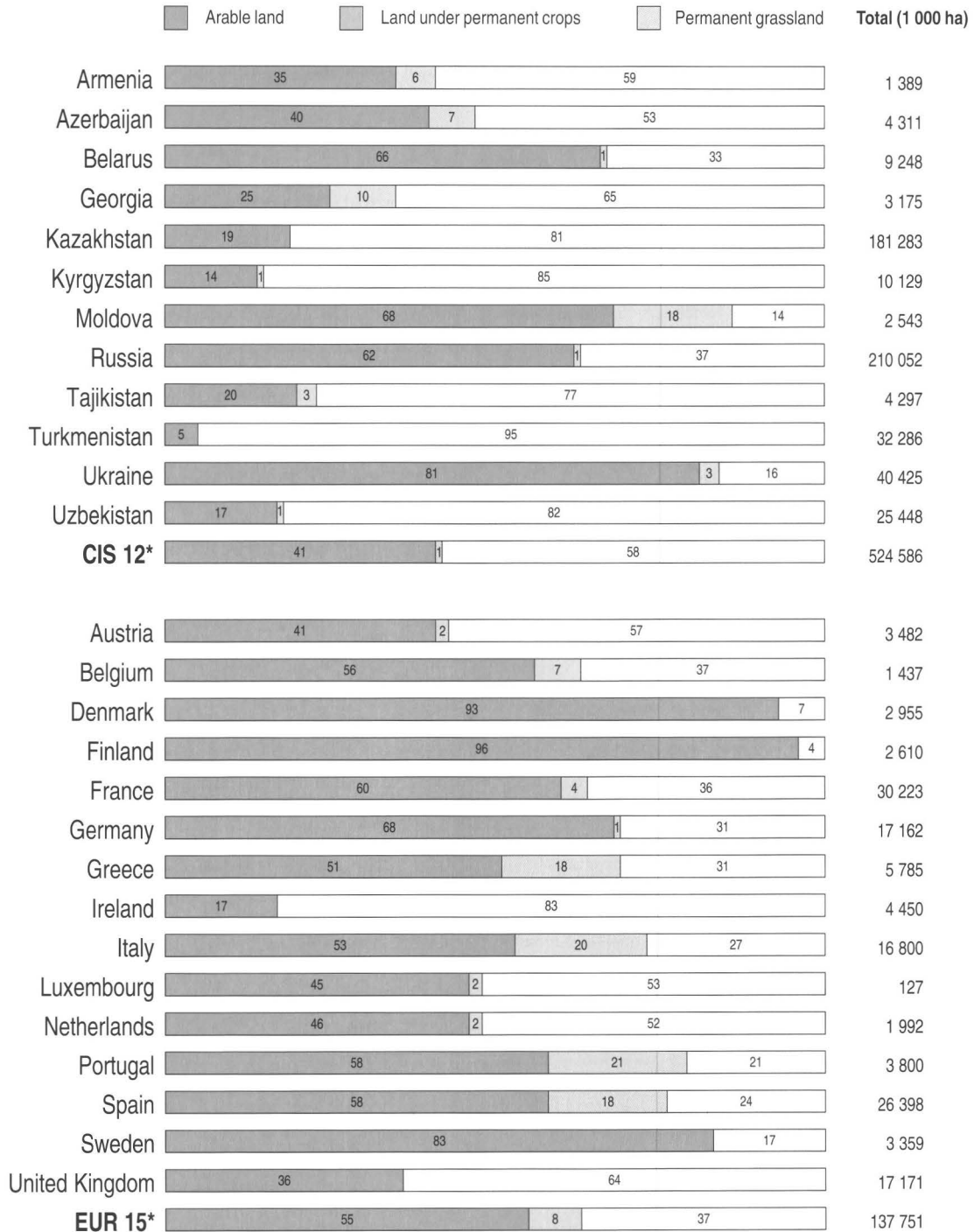
EU

In 1993, total agricultural area for the current 15 Member States was 138 million ha, which was equivalent to 26% of the area in the CIS. Arable land covered over 77 million ha, compared with 49 million ha for permanent grassland. France and Spain together account for 43% of total agricultural area in the EU. In the Scandinavian

countries, 83–96% of the agricultural area is arable land. Favorable climatic conditions enable the Mediterranean countries (Greece, Italy, Portugal, and Spain) to devote about one-fifth of their agricultural areas to permanent crops. The EU average is 8%, compared with 1% in the CIS.

7.2. Agricultural Area

1993
(%)



7.3. Production of Major Agricultural Commodities

CIS

Crop production decreased by 12% in the CIS during 1990–1993. Grain output was down by 13%, of sugar beet and sunflowers by 20%, and of vegetables by 7%. Russia and Ukraine are the largest suppliers of agricultural commodities in the CIS. Together, they produced 93% of sugar beet, 80% of wheat and potatoes, 65% of vegetables, and 50% of fruit in the CIS. Belarus is the third largest producer of potatoes and Kazakhstan of wheat. Uzbekistan and Turkmenistan together account for 82% of cotton output, which is exported worldwide. Uzbekistan is also an important fruit and vegetables exporter.

In 1993 cereals and pulses were the major crops in the CIS based on area. They were mainly (93%) concentrated in three countries: Russia (58%), Kazakhstan (22%) and Ukraine (13%). Grain crops are predominant in nearly all countries,

except Tajikistan, Turkmenistan, and Uzbekistan, where the main crop is cotton. Wheat represents 46% of all grain crops in the CIS (60% for Kazakhstan).

Crop distribution has changed as priorities are shifted to other crops in many countries. In Turkmenistan, for example, the grain-growing area expanded from 19% to 30% during 1990–1993, whereas the area for cotton — the country's traditional crop — shrank by 5 percentage points to 44%. Similar developments were observed in Uzbekistan, Tajikistan, and Kyrgyzstan. Cropped area for sugar beet expanded in Belarus and Kazakhstan; for grain in Armenia, Azerbaijan, and Belarus; and for sunflower in Kazakhstan, Kyrgyzstan and Russia (to compensate for reduced supplies of vegetable oil from the other CIS countries).

7.3. Production of Major Agricultural Commodities

EU

In 1993, grain was produced on over half the arable land, i.e. on one-quarter of total agricultural area. France, Spain and Germany together accounted for about two-thirds of the total cropped area for grain. The most important cereal is wheat. The EU average is one-third of the grain area, but in Greece, Italy, and the Netherlands, it can represent about two-thirds of the grain area in the country.

The EU is practically self-sufficient for most agricultural commodities such as cereals, potatoes and certain vegetables. A variety of crops and commodities are produced and traded depending on each country's climatic conditions. In general, the northern countries are major producers of cereals, while the southern countries along the Mediterranean have a wide range of fruit and vegetables.

The EU is the world's second largest cereal producer after United States. Average annual output was about 178 million t during 1991–1993, compared with 100 million t each for China and Russia, respectively. The most important grain producers are France (33% of EU production), Germany (18%), the United Kingdom (12%), and Italy (10%).

More than half of the output of potatoes comes from Germany, the Netherlands and the United Kingdom, and of sugar beet from France and Germany.

For Spain, Italy, and Greece, fruit and vegetables represent up to 60% of total agricultural output in value terms. Together with France, these countries produce 75% of the fruit and 66% of the vegetables in the EU. The four countries supply the northern Member States, particularly Germany and the United Kingdom, which are the biggest importers of eggplants, broccoli, green beans, peaches, cherries, and apricots.

Italy, the biggest producer in the EU, accounts for almost one-third of the fruit and one-quarter of the vegetable output. About two-thirds of the tomatoes grown in the EU originate from Italy (5.4 million t) and Spain (2.7 million t). But overall demand in the EU for fruit exceeds internal supplies by 25%. Exotic fruit and vegetables have to be imported, mostly from countries along the southern Mediterranean coast, Africa, and Latin America.

7.3. Production of Major Agricultural Commodities

1991—1993

Harvested area¹:*(average, 1 000 ha)*

	Grain crops		Pulses	Potatoes	Vegetables	Sugar beet	Cotton
	Total	of which wheat					
Armenia	178	90	2	28	22	—	—
Azerbaijan	657	447	7	20	34	—	234
Belarus	2 552	115	121	727	59	50	—
Georgia	266	92 ²	12	23	27	1 ²	—
Kazakhstan	22 396	13 362	137	236	77	66	113
Kyrgyzstan	585	260	1	26	19	6	23
Moldova	759	310	73	58	75	82	—
Russia	59 063	24 034	2 490	3 379	676	1 390	—
Tajikistan	247	176	11	13	26	—	286
Turkmenistan	334	191	1	3	25	—	583
Ukraine	12 996	6 374	1 296	1 595	484	1 529	—
Uzbekistan	1 181	604	10	43	166	2	1 694
CIS 12	101 214	46 055*	4 161	6 151	1 690	3 126*	2 933
Austria	...	...	...	33	...	53	—
Belgium	312	206	6	58	55	101	—
Denmark	1 543	575	113	48	14	65	—
Finland	...	102	...	36	...	37	—
France	9 015	4 914	715	173	244	453	—
Germany	6 433	2 482	189	338	82	536	—
Greece	1 409	957	...	46	307	47	317
Ireland	294	84	3	22	6	32	—
Italy	4 017	2 500	136	105	8	283	—
Luxembourg	30	8	1	1	0	0	—
Netherlands	182	123	18	181	67	120	—
Portugal	741	275	...	99	51	0	—
Spain	7 139	2 166	272	244	414	169	62
Sweden	...	311	...	37	...	46	—
United Kingdom	3 340	1 935	218	171	169	197	—
EUR 15	34 455	12 148	1 671	1 602	1 417	2 079	379

1. For CIS 12: sowing area.

2. 1990.

7.3. Production of Major Agricultural Commodities

1991—1993
(average, 1 000 t)

Crop production:

	Total	Grain of which wheat	Pulses	Potatoes	Vegetables	Fruit	Sugar beet	Cotton
Armenia	307	178	3	337	446	272	—	—
Azerbaijan	1 232	867	12	163	616	1 129	—	387
Belarus	6 805	309	206	9 862	934	533	1 278	—
Georgia	490	258 ⁷	5	238	350	641	34 ⁷	—
Kazakhstan	21 037	12 253	95	2 336	904	174	937	245
Kyrgyzstan	1 465	633	1	332	354	106	118	50
Moldova	2 733	1 125	116	443	851	1 608	2 098	—
Russia	95 520	42 871	2 828	36 770	10 090	3 097	25 099	—
Tajikistan	259	152	6	165	552	271	—	593
Turkmenistan	741	364	1	32	329	182	—	1 358
Ukraine	38 329	20 831	2 616	18 612	5 930	2 818	32 889	—
Uzbekistan	2 096	817	6	396	3 294	1 026	17	4 336
CIS 12	171 014	80 658*	5 895	69 686	24 650	11 857	62 470*	6 969
Austria	2 682 ¹	1 018 ¹	—	788 ¹	252	599	2 620 ¹	—
Belgium	2 081	1 414	19	2 190	1 380	540	5 898	—
Denmark	8 140	3 867	397	1 561	...	...	3 303	—
Finland	3 114	303 ²	—	742	201	15	1 029	—
France	58 793	32 059	3 465	5 641	5 755	3 290	30 979 ⁵	—
Germany	32 591	14 383	—	11 712	2 220	2 925 ⁴	27 892	—
Greece	5 259	2 542	—	997	4 000 ³	3 121 ³	2 706	862
Ireland	1 889	661	13	606	306 ³	18 ³	1 429	—
Italy	18 355	8 842	223	2 342	12 135	7 070	12 581	—
Luxembourg	154	46	2	23	2	9	0	—
Netherlands	1 384	999	39	7 209	3 655 ³	570	8 021	—
Portugal	1 310	417	...	1 194	2 025 ⁶	585 ³	20	—
Spain	16 609	4 942	175	5 261	10 850 ³	3 560 ³	7 149	101
Sweden	4 721	1 545	—	1 156	...	21	2 180	—
United Kingdom	21 394	13 782	465	6 851	3 795	525	8 367	—
EUR 15*	178 476	86 820	4 798	48 273	49 334	22 848	114 174	963

1. 1993.

2. 1992–1994.

3. 1990–1992.

4. Excluding new Lander.

5. Including overseas territories.

6. 1989–1991.

7. 1990.

7.4. Livestock and Animal Production

CIS

A serious decline in the livestock population led to substantial losses in agricultural output value (-24%) in practically all CIS countries during 1990-1993. The number of cattle fell by 12.8 million, pigs by 18 million, and sheep and goats by 20.9 million. Falling livestock levels are a direct result of a contraction of the fodder-growing area by 5.5 million ha, including 3.6 million ha in Russia alone.

During 1990-1993, average meat output fell by 28%, milk by 17%, and eggs by 20%. Per capita production of meat fell from 68 kg in 1990 to 49 kg in 1993, of milk from 368 to 296 kg, and of

eggs from 284 to 225 units. The lowest levels were reported from Armenia, Azerbaijan, Georgia, Tajikistan, Turkmenistan, and Uzbekistan: 12-26 kg for meat, 72-164 kg for milk, and 51-77 units for eggs.

Belarus, Kazakhstan, Russia, and Ukraine are the leading producers of animal products and contribute 90-95% of overall output. However, even these countries import a variety of animal products from third countries, particularly from the EU (Denmark, France, Germany, Netherlands) and North America (Canada, United States).

EU

In 1993, the livestock population in the EU was made up of 84 million cattle, 110.8 million pigs, and 111.3 million sheep and goats. Livestock levels in the EU and CIS are similar, except that the pig population is twice as high as in the CIS. France, Germany and the United Kingdom have the largest herds of cattle (57% of EU total). Germany, the Netherlands, and Spain account for 53% of the total pig population in the EU, whereas Greece, Spain, and the United Kingdom have the largest stock of sheep and goats (almost two-thirds of the EU total).

Incentives to discontinue farming, genetic selection, and slaughtering of the least productive cows led to a sharp decline of cattle herds between 1990 and 1993. Substantial losses were recorded in Germany (-18%), Italy (-8%), and France (-6%). The combined share of France and Germany in the EU cattle population dropped from 50% in 1990 to 43% in 1993.

Dairy farming is the main activity in animal production in the EU; in 1992 one farm in seven was involved in milk production. Since the introduction of quotas in 1984, surpluses have been drastically cut and milk production has varied little from year to year. In 1993, EU farms produced a total of 121 million t of milk, or 328 kg per capita (compared with 299 kg per capita in the CIS).

Meat production exceeded 35 million t in 1993. France and Germany were the largest producers, ahead of Italy and Spain; together, these four countries contribute 60% of total meat production in the EU. The EU (15 million t) ranks second after China for pork production. Germany accounts for one-fourth of the EU total, and Germans are also the second largest pork consumers (57 kg per head annually) after the Danes (65 kg).

7.4. Livestock and Animal Production

1990, 1993
(1 000 head, at the end of the year)

	Cattle							
	Total		of which cows ¹		Pigs		Sheep and goats	
	1990	1993	1990	1993	1990	1993	1990	1993
Armenia	640	502	251	270	311	81	1 186	736
Azerbaijan	1 832	1 621	711	712	157	48	5 419	4 539
Belarus	6 975	5 850	2 362	2 199	5 051	4 175	444	319
Georgia	1 298	929	552	487	880	365	1 618	957
Kazakhstan	9 756	9 347	3 367	3 687	3 224	2 445	35 657	34 208
Kyrgyzstan	1 205	1 062	506	511	393	169	9 968	7 322
Moldova	1 061	915	395	411	1 850	1 165	1 282	1 445
Russia	57 043	48 890	20 557	19 805	38 314	28 508	58 195	43 561
Tajikistan	1 352	1 250	557	560	183	46	3 292	2 906
Turkmenistan	829	1 104	331	477	267	159	5 481	6 314
Ukraine	24 623	21 622	8 378	8 076	19 427	15 262	8 418	6 841
Uzbekistan	4 581	5 291	1 856	2 258	716	391	9 230	10 187
CIS 12	111 195	98 383	39 823	39 453	70 773	52 814	140 190	119 335
Austria	...	2 334	...	828	...	3 820	...	381
Belgium	3 146	3 127	1 517	705	6 426	6 877	136	133
Denmark	2 241	2 115	959	711	9 282	10 870	111	94
Finland	...	1 252	...	426	...	1 273	...	102
France	21 446	20 099	11 031	4 615	12 013	12 882	11 071	11 430
Germany	19 488	15 897	7 826	5 301	...	26 075	3 239	2 448
Greece	687	608	360	219	1 143	1 143	10 150	15 890
Ireland	6 100	6 309	2 517	1 274	1 249	1 487	5 164	5 990
Italy	8 235	7 581	3 869	2 287	8 837	8 348	10 848	12 038
Luxembourg	215	205	107	51	70	72	7	8
Netherlands	4 830	4 629	2 155	1 777	13 788	13 991	1 880	1 896
Portugal	1 340	1 322	652	375	2 664	2 665	3 360	4 141
Spain	5 104	5 001	2 884	1 370	15 949	18 188	24 022	27 223
Sweden	...	1 803	...	525	...	2 101	...	470
United Kingdom	11 843	11 710	5 238	2 786	7 380	7 868	30 147	29 429
EUR 15	...	84 053	...	23 250	...	110 833	...	111 283

1. For EUR 15: dairy cows.

7.4. Livestock and Animal Production

1991-1993
(average production)

	Meat ¹ (1000 t)	Milk (1000 t)	Eggs (mn units)
Armenia	66	402	309
Azerbaijan	120	866	785
Belarus	945	6 094	3 589
Georgia	118	488	393
Kazakhstan	1 364	5 465	3 643
Kyrgyzstan	224	1 013	543
Moldova	238	1 134	830
Russia	8 383	48 577	43 443
Tajikistan	72	524	304
Turkmenistan	102	547	286
Ukraine	3 415	19 966	13 493
Uzbekistan	493	3 591	2 011
CIS 12	15 540	88 667	69 629
Austria	773 ²	3 270	...
Belgium ³	1 692	3 514	3 218
Denmark	1 825	4 605	1 421
Finland	327 ²	2 462	1 080
France	6 726	25 315	15 423
Germany	6 600	27 991	14 649
Greece	563	1 805	2 465
Ireland	1 019	5 378	665
Italy	4 254	10 315	11 165
Luxembourg	—	—	—
Netherlands	2 940	10 901	10 541
Portugal	703	1 715	1 843
Spain	3 931	6 143	10 673
Sweden	508	3 200	1 749
United Kingdom	3 544	14 711	10 902
EUR 15 *	35 423	121 325	85 794⁴

1. Carcass weight.
2. 1993.
3. BLEU.
4. Excluding Austria.

CIS

Forest land covers around 800 million ha in the CIS, and timber stocks stand at about 85 billion m³. Over two-thirds of the forest are coniferous; the predominant species are larch, pine and firs. Almost all forests (95%) and stocks (96%) are concentrated in Russia. The overall potential timber supply in the CIS has not been fully exploited. In the early 1990s, only half the area earmarked for logging was actually logged, although felling in certain regions of Belarus, Russia, and Uzbekistan exceeded pre-established norms.

Increasingly, fires are becoming a threat to forests and wooded land. Each year, 20 000–30 000

forest fires destroy 500 000–750 000 ha of forest land. Besides, afforestation has started slowing down in the early 1990s.

About 190 million m³ of timber were removed in 1993; Russia alone accounted for 92% of this total. Despite a fall in removals by 35% compared with the 1991 figure, Russia exported wood products worth US\$1.2 billion in 1993. The main destinations were today's 15 EU Member States (one-third of export value) and Japan (42% of export value).

EU

In the early 1990s, about one-third of the EU territory was covered by forests and other wooded land. Of these areas three-quarters were pure forests (97 million ha), and the rest was covered with scrub vegetation and bushland (mainly around the Mediterranean). Wooded area and raw wood production in the EU have increased considerably with the entry of the densely forested Scandinavian countries. The EU is now less dependent on imported forest products from third countries than it was during the 1970s and 1980s.

Almost half the forest areas in the EU are found in Sweden (25 million ha) and Finland (20 million ha). Together with France and

Germany, the two new Scandinavian members accounted for 71% of EU timber removals in 1991. In 1994, Finland imported more than 6 million m³ of roundwood from Russia (out of a production of 47.5 million m³ or 38% more than in 1991) to compensate for growth in domestic and EU consumption.

Swedish and Finnish technology (cutting, transport logistics) is now being transferred to neighbouring countries (Belarus, the Baltic States, Russia), which have become major suppliers. Subsequent improvements in wood processing are also expected to benefit the local paper and furniture industries in these countries.

7.5. Forestry

1993

	Forest area ¹ (1000 ha)	Growing stock ¹ (mn m ³)	Stock/ area ¹ (m ³ /ha)	Timber removals ² (1 000 m ³)
Armenia	329	39	119	4.8
Azerbaijan	992	128	129	47
Belarus	7 028	921	131	6 155
Georgia	2 758	422	153	...
Kazakhstan	9 643	366	38	1 170
Kyrgyzstan	729	23	32	18
Moldova	315	35	111	61
Russia	771 109	81 644	106	174 628
Tajikistan	410	6	15	—
Turkmenistan	4 127	14	3	4.5
Ukraine	8 621	1 320	153	7 845
Uzbekistan	1 909	11	6	0.5
CIS 12	807 970	84 929	105	189 933³
Austria	387	998	2 579	15 572
Belgium	62	92	1484	4 755 ⁵
Denmark	46	58	1261	2309
Finland	20 112	1 773	88	34 538
France	13 110	1 875	143	43 554
Germany	10 490	...	...	44 869
Greece	2 512	169	67	2 546
Ireland	396	32	81	1 650
Italy	6 750	993	147	8 327
Luxembourg	85	20	235	— ⁵
Netherlands	334	62.5	187	1 093
Portugal	2 755	203	74	10 809
Spain	8 388	540	64	16 855
Sweden	24 437	2 721	111	51 100
United Kingdom	2 207	231	105	6372
EUR 15	96 539	10 322.5⁴	107⁴	244 349

1. For CIS 12 : data are shown as of 1 January 1988, for EUR 15: 1990 (estimates by FAO).

2. For EUR 15: 1991.

3. Excluding Georgia.

4. Excluding Germany.

5. BLEU.

CIS

Russia and Ukraine account for 97% of the total catch of fish and fish products in the CIS; ocean fishing predominates in the two countries. The total catch was almost halved during 1990–1993 (Russia, –45%, Ukraine, –67%), mainly because of the disappearance of traditional inter-state ties and other problems related to economic transition. As a result, the total catch in the CIS was almost half that in the EU in 1993, whereas in 1990 the combined catch of Russia and Ukraine was 32% higher than in the EU (EUR15).

In Russia, however, the decrease in output did not have any impact on export levels, which remained stable over the years. In 1993, the country exported fresh fish worth US\$1.1 billion (US\$0.2 billion to the EU). The main destinations were South Korea (138 000 t), Norway (137 000 t), Japan (126 000 t), and China (124 000 t). Russia also exported crabs and other marine products (US\$162 million) and canned fish (US\$23 million, including caviar worth US\$11 million).

EU

Fishing employs only about 0.2–0.3% of the EU workforce, but it is an essential economic activity, particularly in the coastal areas. The total catch for the current 15 Member States was about 7.2 million in 1992. The EU ranks third in the world after China (13.1 million t) and Japan (9.3 million t), but ahead of the United States (5.5 million t). Norway and Iceland are also important fishing nations; together, they account for a total catch of 4 million t (56% of the EU figure).

Denmark is the biggest fish producer in the Union; its total catch of 2 million t is processed mainly into fish meal and fish oil. Spain ranks

second (1.2 million t) in 1992, followed by France (0.9 million t), and the United Kingdom (0.8 million t). Most of the fishing is concentrated in the Atlantic (80%), and some in the Mediterranean (11%). Fishing in rivers and lakes is predominantly of recreational and less of commercial value.

The EU catches includes mainly sand eel (1 million t), herring (0.7 million t), mackerel (0.5 million t), sardines (0.4 million t), and cod (0.3 million t). Annual per capita consumption of fish in the EU is 15 kg, compared with 35 kg in Japan.

7.6. Fisheries

1990, 1993
(1 000 t)Annual catches of fish¹ :

	1990	1993 ²
Armenia	8	3
Azerbaijan	42	22
Belarus	20	10
Georgia	105	...
Kazakhstan	87	59
Kyrgyzstan	1	—
Moldova	9	9
Russia	7 879	4 369
Tajikistan	4	3
Turkmenistan	45	17
Ukraine	1 061	365
Uzbekistan	27	24
CIS 12	9 288	4 881³
Austria	5	4
Belgium	42	37
Denmark	1 511	1 989
Finland	82	85
France	971	881
Germany	363	272
Greece	140	169
Ireland	214	250
Italy	492	523
Luxembourg	—	—
Netherlands	347	396
Portugal	322	300
Spain ⁴	1 227	1 152
Sweden	255	311
United Kingdom	781	815
EUR 15	6 752	7 184

1. For CIS 12: including sea products.
2. For EUR 15: 1992.
3. Excluding Georgia.
4. Estimates by FAO.

Industry

Key Facts (1993)	CIS 12	EUR 15
Share in GDP (%)	44.4 ¹	33.1 ²
Share in total employment (%)	36.0 ³	31.0 ²
Industrial production index 1994 (1990=100)	51.1	99.8
Industrial production of selected branches (mn t)		
Pig iron	71.5 ³	92.8
Steel	97.8 ³	144.4
Finished rolled steel products	71.9 ⁴	118.3 ⁵
Wood pulp	5.6	28.7 ⁷
Paper (including newsprint and cardboard)	5.2 ³	61.2 ^{6,7}
Fertilizers	16.7	18.5 [*]
Passenger cars (mn)	1.1	11.1
Lorries (mn)	0.6	1.3

1. Excluding Tajikistan.
2. EUR 12.
3. Excluding Georgia.
4. Excluding Moldova.
5. Excluding Sweden.
6. Excluding Ireland.
7. 1992.

CIS

Industry is an important generator of income and employment in CIS countries. The share of the industrial sector (including construction and energy) in GDP and employment is substantially higher in the CIS than in the EU. It is highest in Turkmenistan: 62% of GDP and 21% of employment. Industry represents almost half of GDP in Ukraine (37% of employment), 44% in Russia (40% of employment), 42% in Kazakhstan (28% of employment), about 40% Belarus (38% of employment) and Armenia (31% of employment).

However, during the past few years the workforce has shown a shift towards the service sector, which was expanding in most countries. The share of industrial employment (including construction and energy) dropped by 4 percentage points in Azerbaijan (from 26% to 22%), Kazakhstan (from 32% to 28%), Belarus (from 42% to 38%) and Ukraine (from 41% to 37%) during 1990–1993. In Russia the shift was less significant (from 42% to 40%).

Overall industrial capacity also declined during the same period owing to slow replacement of depreciated equipment. This downward trend was particularly pronounced in the upstream sectors that ensure supply of raw materials and fuel to the other branches of industry, and in the food industry.

The industrial sector is most developed in Belarus, Kazakhstan, Russia, Ukraine, and Uzbekistan. These five countries account for 95% of industrial output in the CIS; Russia and Ukraine alone contribute 80%.

The current trend towards privatization has led to the conversion of public enterprises into joint stock companies and the development of small, privately-owned businesses. The share of the private sector therefore increased substantially in industry and construction between 1991 and 1993: Azerbaijan (from 8% to 16%), Belarus (from 9% to 13%), Kazakhstan (from 9% to 35%), Kyrgyzstan (from 7% to 37%), Russia (from 10% to 22%), Uzbekistan (from 16% to 25%).

EU

In spite of the growing importance of services, industry (including energy and construction) remains one of the leading economic sectors accounting for 33% of total EU output in 1993, compared with 39% in 1980. For most EU Member States, industry represents well over one-third of total value-added and employment. Austria ranks highest with an industrial share of 44% in GDP and 35% in employment, followed by Germany (40% of GDP; 38% of employment) and Sweden (40% of GDP; 25% of employment).

The EU's (EUR15) industrial output of around ECU3000 billion in 1993 surpassed that of the United States (about ECU2600 billion) and Japan (about ECU2400 billion). About 80% of EU industrial production comes from the four large countries (Germany, France, Italy, United Kingdom); Germany's share was 32% in 1993. Over half of total value added by industry comes from electrical engineering and electronics, food and beverages, motor vehicles, and chemicals.

Following the Union Treaty (Title XIII), the Member States have for the first time committed themselves to closer cooperation with the Commission on industrial policy. Another aim is to ensure fair competition (Art. 85–86), including policies on monopolies and mergers and also limitation of state aid (Art. 90, 92).

Various Community programmes already provide funds to promote technological competitiveness of EU industry. They assist innovative small and medium-sized businesses (SMEs), which would otherwise face great difficulties in competing in foreign markets and in mobilizing the necessary human, financial, and technological resources. These programmes aim to provide finance (especially for SMEs), to enhance market and technological transparency, to foster cooperation and dialogue, and to help industrial firms penetrate foreign markets, especially Japan and the United States.

Industrial promotion efforts focus on the future challenges of innovation, rapid structural adjustment, and development of high value-added industries (e.g. electronics, telecommunications, biotechnology, and aerospace). A special Executive Training Programme, managed by the European Commission, enables EU company managers to gain experience and establish business contacts in Japan. Other facilities offered to companies interested in expanding their operations in the single market are the Business Cooperation Centre (BCC), which disseminates information about cooperation proposals, and the Business Cooperation Network (BC-Net), which links consultants and companies interested in partnerships throughout Europe.

CIS

The difficulties related to the introduction of a market economy have led to a sharp decline in industrial output in practically all CIS countries. Although the overall fall in output between 1990 and 1993 was 34%, in countries like Armenia, Georgia, Kyrgyzstan, production losses were as high as 45–69%. The situation was also serious in Moldova, Russia, and Tajikistan where output decreased by about one-third, as well as in Azerbaijan and Kazakhstan (26–27%). In the remaining countries the fall was less dramatic. The downward trend persisted in all countries during 1994. Industrial output fell by 23% in the CIS compared with 1993 (by 49% compared with 1990).

For the most important branches of industry (including energy), the following production indices were observed during 1990–1993 (1990 = 100):

- Armenia: light industry (49); mechanical engineering and metal working (46); food industry (31)
- Azerbaijan: light industry (86); mechanical engineering and metal working (82); fuels (74); food industry (58)
- Belarus: light industry (106); mechanical engineering and metal working (96); food industry (75); chemicals and petrochemicals (72)
- Kazakhstan: electricity (89); nonferrous metals (83); fuels (82); ferrous metals (73); food industry (58)
- Kyrgyzstan: electricity (82); light industry (82); mechanical engineering and metal working (41); food industry (37)
- Moldova: mechanical engineering and metal working (76); food industry (66)
- Russia: electricity (91); fuels (77); food industry (69); ferrous metals (65); mechanical engineering and metal working (65); nonferrous metals (58); chemicals and petrochemicals (58)
- Tajikistan: light industry (101); nonferrous metals (50); food industry (49)
- Turkmenistan: light industry (120); food industry (93); fuels (86)
- Ukraine: mechanical engineering and metal working (102); light industry (85); food industry (65); ferrous metals (62)
- Uzbekistan: light industry (113); mechanical engineering and machine-tools (112); food industry (91)

8.2. Trends in Industrial Production

EU

Industrial output in the EU Member States stagnated or slowed down during 1990–1993. The only exception was Ireland where production grew by 19% in 1993 and by one-third in 1994 (compared with 1990). In Austria, Denmark, the Netherlands, and the United Kingdom output levels remained stable during 1990–1993, but an upswing occurred in 1994.

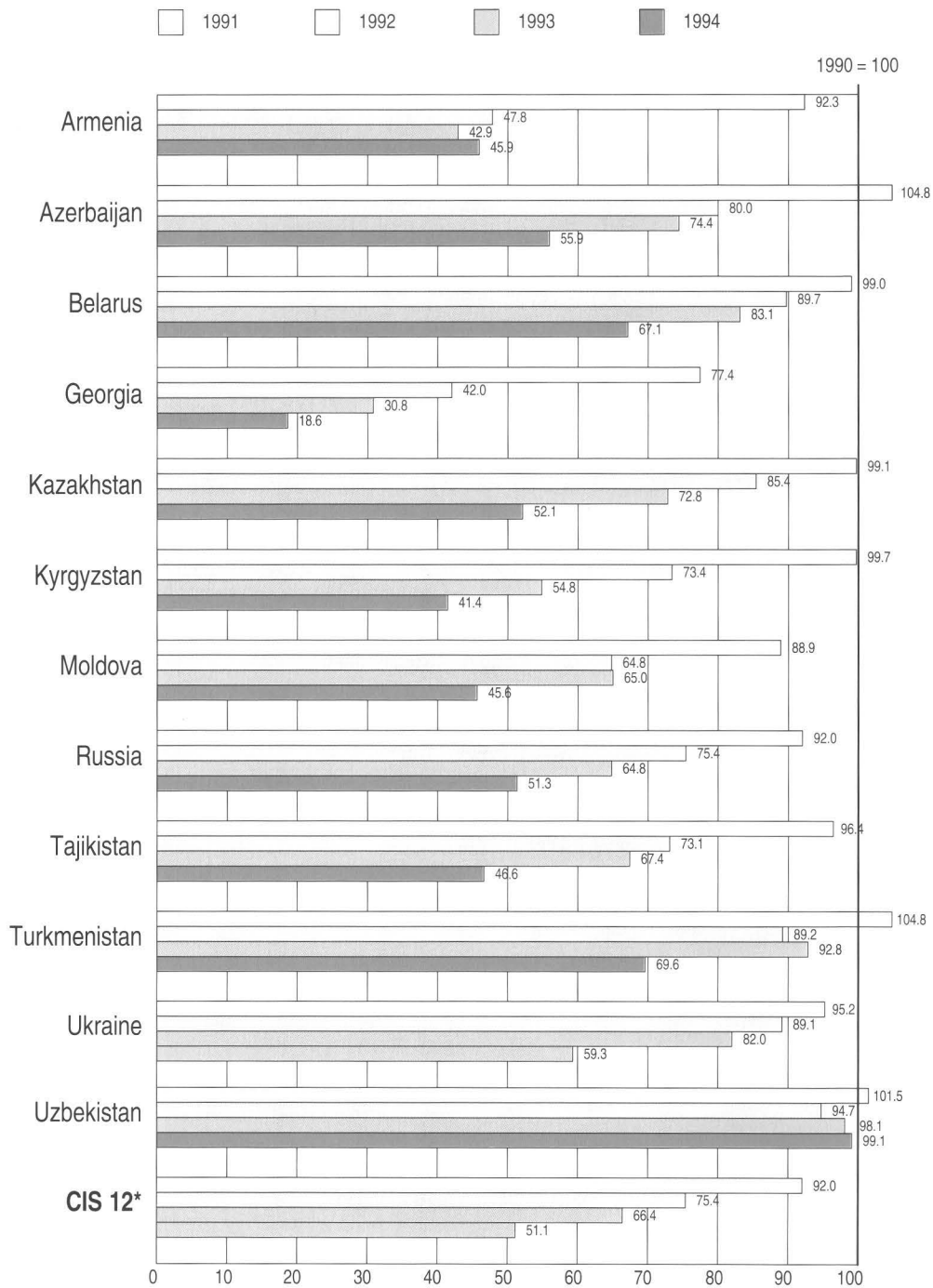
Above-average production indices (base year=1990) were recorded in certain countries for selected industries:

- Capital goods (EUR12 average: 87.7): Ireland (117.9), Greece (102.8), Luxembourg (98.9)
- Consumer durables (EUR12 average: 88.1): Netherlands (100.3), Denmark (97.9), Belgium (97.7)
- Food and drink industry (EUR12 average: 102.0): Ireland (116.3), Greece (113.4), Denmark (106.7), France, Italy (both 103.4)
- Textiles (EUR12 average: 89.2): Ireland (107.9); Italy (98.2), United Kingdom (90.2)
- Leather and footwear (EUR12 average: 88.8): Italy (97.3), Portugal (94.1)
- Paper and cardboard (EUR12 average: 102.3): France (106.1), Ireland, Italy (both 103.1)
- Chemicals (EUR12 average: 102.3): Luxembourg (177.6), Ireland (156.6), France (109.8), Denmark (109.3), Belgium (107.8), United Kingdom (107.5)
- Plastics and rubber (EUR12 average: 91.3): Belgium, United Kingdom (both 100.7), Denmark (100.5)
- Basic metals (EUR12 average: 89.4): Denmark (121.8), Netherlands (101.2), Italy (100.3)
- Motor vehicles (EUR12 average: 83.7): Belgium (96.0), United Kingdom (93.2).

The absence of consistent growth in large countries like France, Germany, and Italy can be attributed to decreasing competitiveness. EU industries face stiff competition from Asian countries for consumer durables. The main competitors for higher value-added goods are the United States (e.g. computer hard- and software, telecommunications) and Japan (e.g. electronics, cars, machine-tools).

8.2. Trends in Industrial Production¹

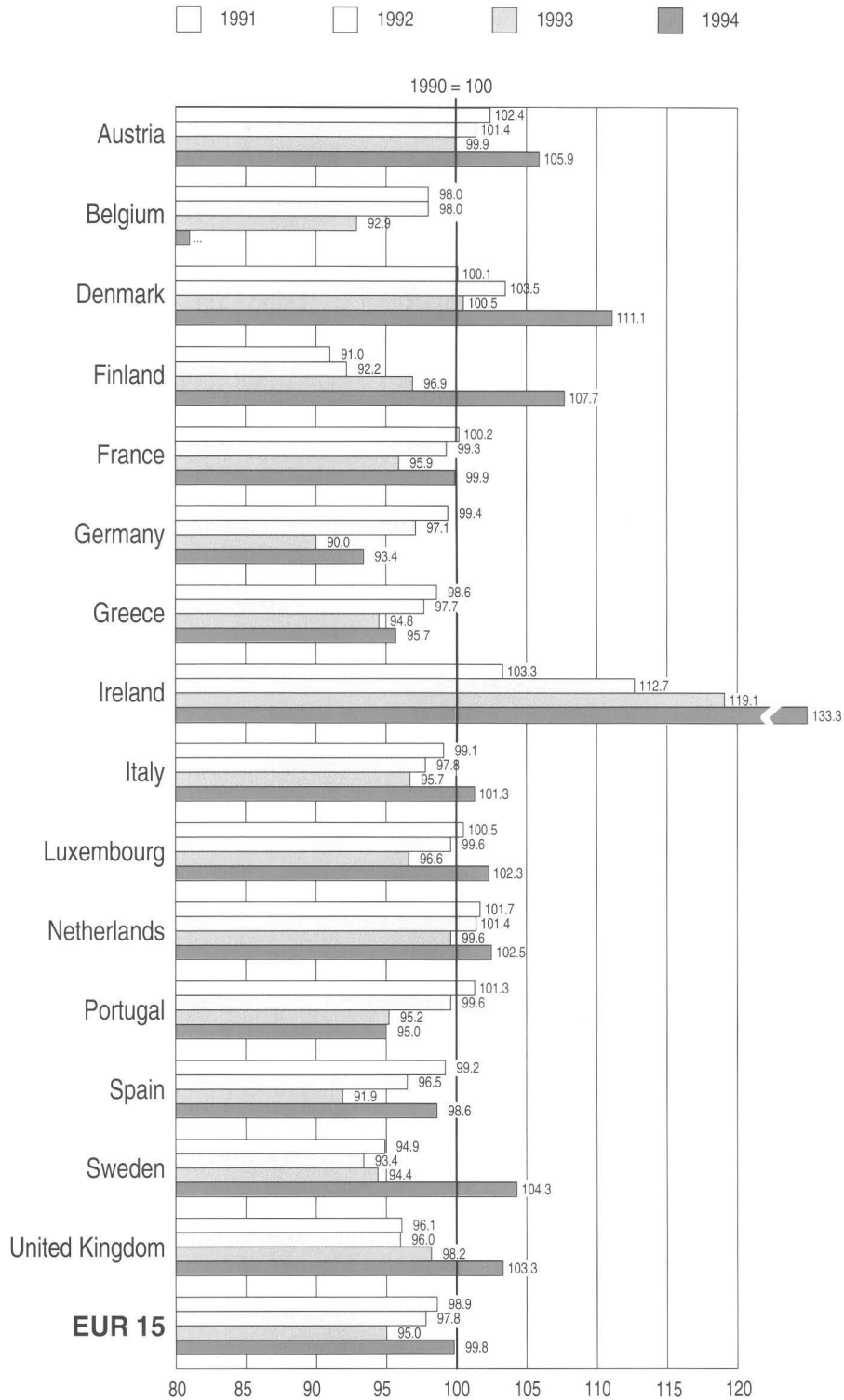
1991-1994
(in constant prices)



1. Total industry including energy, but without construction.

8.2. Trends in Industrial Production¹

1991-1994
(in constant prices)



1. Total industry including energy, but without construction.

8.3. Iron and Steel

CIS

The biggest manufacturers of ferrous metals in the CIS are Russia and Ukraine; they produce around 90% of the iron and steel products. During 1990–1993 output fell steeply in all branches: iron ore, –34% to 155 million t; pig iron, –35% to 71.5 million t; steel, –36% to 97.8 million t; finished rolled products, –36% to 71.9 million t. Iron ore production was halved in Kazakhstan and decreased by 38% in Ukraine, by 29% in Russia, and by 25% in Azerbaijan. The fall in production of pig iron was of the same order, while steel production fared worse in the producing countries: Armenia, Tajikistan (–80%

in both countries), Azerbaijan (–66%), Turkmenistan (–57%), and Kyrgyzstan (–47%).

In addition, the industry suffers from low productivity owing to outdated technology. About 50% of the steel in Russia and Ukraine is smelted using the open-hearth process, compared with only 2% in Germany and the United States. In France and Japan, this technology has been replaced by more efficient techniques such as the oxygen converter-based process; in Russia and Ukraine it is used for smelting only 38–40% of the steel (but up to 70% in Kazakhstan).

EU

In 1993 the EU steel industry employed about 350 000 people (EUR15) and recorded an overall output of 144.4 million t. Apart from Italy, which recorded a slight increase in steel production during 1990–1993, the sector suffered visible losses across the EU owing to the economic downturn in the main producer countries (Germany, France, and the United Kingdom). Altogether, production levels for steel declined by about 3% in volume and 13% in value.

Germany and Italy are the largest producers of pig iron, steel, and finished rolled products in the EU. In 1993, the two countries accounted for 44% (63.4 million t) of total crude steel production.

Luxembourg, the smallest EU Member State, has a highly developed and concentrated steel industry, which accounts for one-quarter of industrial employment and 29% of the country's exports (1992). Per capita steel output in Luxembourg was 9.3 t compared with 0.5 t for Germany.

The EU is a net exporter of steel. In 1993 exports stood at 34 million t (24% of production) and imports at over 17 million t. The main suppliers were central Europe (24% of EU imports) and Russia (13% of EU imports). The main destinations of EU exports were the United States (20%) and developing countries (39%), especially China.

8.3. Iron and Steel

1990, 1993
(production, 1 000 t)

	Pig iron		Crude steel		Finished rolled products	
	1990	1993	1990	1993	1990	1993
Armenia	—	—	3.7	0.1	—	—
Azerbaijan	—	—	703	236	522	177
Belarus	—	—	1 112	946	686	639
Georgia	625	...	1 315	...	1 105	140
Kazakhstan	5 226	3 552	6 753	4 558	4 899	3 436
Kyrgyzstan	—	—	3.2	1.7	—	—
Moldova	—	—	712	497	580	...
Russia	59 387	40 857	89 622	58 346	63 737	42 718
Tajikistan	—	—	5.2	0.9	—	—
Turkmenistan	—	—	2.1	0.9	—	—
Ukraine	44 927	27 108	52 622	32 610	38 610	24 218
Uzbekistan	—	—	1015	610	955	573
CIS 12	110 165	71 517¹	153 869	97 807¹	111 094	71 901²
Austria	3 452	3 070	4291	4 149	3 719	3 446
Belgium	9 416	8 178	11 453	10 178	9 128	9 751
Denmark	—	—	610	604	550	527
Finland	2 283	2 535	2 860	3 256	2 799	2 989
France	14 415	12 665	19 016	17 107	16 268	14 046
Germany	30 097	26 970	38 434	37 625	31 610	31 140
Greece	—	—	999	980	1 948	1354
Ireland	—	—	326	329	305	305
Italy	11 883	11 200	25 467	25 817	23 105	21 943
Luxembourg	2 645	2 411	3 560	3 292	3 223	2 608
Netherlands	4 960	5 406	5 412	6 001	3 602	411
Portugal	339	397	746	775	846	718
Spain	5 482	5 394	12 936	12 960	11 340	11 563
Sweden	2 845	2 941	4454	4 591	2 250	...
United Kingdom	12 496	11 600	17 895	16 707	14 501	13 765
EUR 15	100 313	92 767	148 459	144 371	125 191	118 274³

1. Excluding Georgia.

2. Excluding Moldova.

3. Excluding Sweden.

8.4. Wood Pulp and Paper

CIS

More than one-fifth of the world's forests and one-quarter of growing (tree) stock are concentrated in the CIS. Despite this abundance of raw material, the CIS trailed far behind the industrialized countries in paper and newsprint production. The main causes are outdated technology and obsolete equipment. In fact, fixed assets have depreciated by 50% and, today, only 25% are currently up to international standards.

The situation has deteriorated even further in the past few years. During 1990–1993, total output

in the industry declined by 48% in the CIS (50% for paper, 41% for wood pulp). Downstream sectors such as printing and publishing have also been adversely affected. Most CIS countries import wood and paper products from Russia, which is the main producer. All the newsprint, 98% of the wood pulp, and 84% of the paper and cardboard are produced in Russia.

EU

During 1990–1993, EU wood pulp and paper production stood stable at around 90 million t, making the EU the world's second largest producer after the United States (140 million t) but ahead of Canada and Japan (both, 39 million t). Finland and Sweden are major suppliers of wood pulp and paper; together, they account for about 62% of EU wood pulp production. In 1993, before their accession, these two countries supplied almost ECU10 billion worth of forest products to the other Member States or 71% of imports (EUR12). Germany was the largest producer of paper (13.2 million t) in 1993, ahead of Sweden and Finland (both 8.7 million t).

As demand for paper rises, spare capacity has been mobilized and many plants are operating at

over 90% of their capacity. Leading pulp and paper groups have started investing in new plants and cost-cutting technology. Many companies are also selling or swapping assets to concentrate on a few niches (e.g. fine paper, newsprint, corrugated packaging, tissues, paperboard) through targeted mergers and acquisitions across the EU. Major challenges lying ahead for Europe's paper companies are stricter environmental checks and regulations imposed by local authorities to control air and water pollution. Companies are facing pressure to rationalize on forest wood and to use recycled paper in the production process.

8.4. Wood Pulp and Paper

1990, 1993
(production, 1 000 t)

	Wood pulp		Newsprint		Other paper and cardboard		Total paper	
	1990	1993 ¹	1990	1993 ¹	1990	1993 ¹	1990	1993 ¹
Armenia	—	—	—	—	7.5	0.8	7.5	0.8
Azerbaijan	—	—	—	—	—	—	—	—
Belarus	36.8	26.0	—	0.3	417	175	417	175
Georgia	—	—	—	—	26.6	...	26.6	...
Kazakhstan	49.8	3.7	—	—	158	44.8	158	44.8
Kyrgyzstan	—	—	—	—	5.5	2.1	5.5	2.1
Moldova	—	—	—	—	—	—	—	—
Russia	9 413	5 468	1 722	845	6 603	3 646	8 325	4 491
Tajikistan	—	—	—	—	—	—	—	—
Turkmenistan	—	—	—	—	—	—	—	—
Ukraine	...	67.2	—	—	912	455	912	455
Uzbekistan	—	—	—	—	76.9	34.2	76.9	34.2
CIS 12	9 499³	5 565	1 722	846	8 206	4 358⁴	9 928	5 203⁴
Austria	1 319	1 339	...	458	...	2 693	2 932	3 151
Belgium	480	453	104	107	1 097	1 210	1 201	1 317
Denmark	101	66	...	...	335	357	335 ⁵	357 ⁵
Finland	7 993	8 331	1 124	1 257	7 928	7 455	9 052	8 712
France	2 273	2 512	422	783	7 049	7 054	7 471	7 837
Germany	2 418	2 097	1 112	1 265	11 648	11 956	12 760	13 221
Greece	26	25	—	—	280 ²	320	280 ²	320
Ireland	...	—	...	...	...	...	...	...
Italy	836	508	233	101	5 582	5 597	5 815	5 698
Luxembourg	—	—	—	—	—	—	—	—
Netherlands	168	175	300	...	2 770	2 553	3 070	2 553
Portugal	1 482	1 619	...	...	780	864	780 ⁵	864 ⁵
Spain	1 576	1 454	173	172	3 446 ²	3 277	3 619 ²	3 449
Sweden	9 914	9 566	2 273	2 326	6 153	6 384	8 426	8 710
United Kingdom	446	516	568	699	4 980	4 278	5 548	4 977
EUR 15	29 032⁶	28 661	...	...	...	53 998⁶	61 289⁶	61 166⁶

1. EUR 15: 1992.
2. 1989.
3. Excluding Ukraine.
4. Excluding Georgia.
5. Excluding newsprint.
6. Excluding Ireland.

CIS

All CIS countries are producers of chemical products, but the industry remains heavily concentrated in Belarus, Kazakhstan, Russia, and Ukraine, which have the necessary raw materials and industrial base. Important base chemicals such as soda ash and caustic soda are produced almost entirely in Russia and Ukraine. Three countries (Belarus, Russia, Ukraine) are almost entirely responsible for the production of chemical fibres and threads (97%), synthetic raisins and plastic materials (95%), mineral fertilizers (89%), and synthetic ammonia (90%).

The former Soviet Union had invested substantially in the development of the chemical sector, mostly in the purchase of sophisticated equipment from abroad. But the decline in investment, and raw material and equipment

imports since the early 1990s has seriously affected the chemical industry.

During 1990–1993, output of soda ash and caustic soda fell by one-third in the CIS, and that of sulphuric acid by half. The fall in base chemical production has had a serious impact on downstream industries. The mineral fertilizer sector in Belarus, Russia, Turkmenistan, and Ukraine presently operates at only 40–50% capacity. Across the CIS fertilizer output shrank by 50% in comparison with 1990. In Azerbaijan, Kazakhstan, and Tajikistan output of mineral fertilizers has fallen to 15–24% of the 1990 level. Plastic materials production has also fallen considerably: Armenia (–80%), Azerbaijan, Moldova, and Uzbekistan (63–67%), Ukraine (60%), Belarus and Russia (31–37%).

EU

The EU is the world's leading producer of chemical products, ahead of its main competitors, the United States and Japan. The EU chemical industry accounts for 12% of total industrial value added, 15% of investments and 30% of R&D expenditures. It comprises basic chemicals (inorganic and organic), finished products (e.g. pharmaceuticals, paints, fertilizers), and artificial and synthetic fibers.

The EU is also the world's largest exporter of chemicals with a net trade balance of ECU23 billion (1993). Major export markets include the United States (28% of all EU exports) and Japan (14%). Increasingly, exports consist of high value-added specialty chemicals, while basic or bulk products are imported. Competition from Asia, and Central and Eastern Europe is growing, especially for basic chemicals such as

sulphuric acid and caustic soda, which provide the raw material base for many products including plastics and fertilizers.

Germany is the top producer of chemicals in the EU; it accounts for more than one-third of total EU output. Other major producers are France, Italy, and the United Kingdom, which together with Germany account for almost three-quarters of EU production.

Average fertilizer production in the EU amounted to about 19 million t annually during 1990–1993. The largest producers, in 1993, were France, Germany, and the Netherlands. While France and Germany have a large domestic market, which absorbs most of their fertilizer production, the smaller Member States Belgium and the Netherlands are very export-oriented.

8.5. Chemical Industry

1990, 1993

(1 000 t)

Production of some basic chemicals:

	Sulphuric acid (H ² SO ⁴)		Caustic soda (NaOH)		Fertilizers	
	1990	1993	1990	1993	1990	1993
Armenia	—	—	0.7	5	—	—
Azerbaijan	603	141	160	49	212	32
Belarus	1 177	399	—	—	5 996	2 513
Georgia	—	—	—	—	130	63
Kazakhstan	3151	1 179	65	15	1 656	304
Kyrgyzstan	—	—	—	—	—	—
Moldova	—	—	—	—	—	—
Russia	12 767	8 242	2258	1423	15 979	9 917
Tajikistan	—	—	45	6	82	20
Turkmenistan	843	206	—	—	176	127
Ukraine	5 011	1 843	444	291	4 815	2 497
Uzbekistan	2 859	1 360	—	—	1 762	1 273
CIS 12	26 411	13 370	2 973	1789	30 808	16 746
Austria	...	...	...	...	315	286
Belgium	1 956 ¹	1 906	...	...	1 759	...
Denmark	33 ³	...	...	...	332	203
Finland	1 153 ¹	1 107	...	...	484	380
France	3 727	2 359	1426	1473	3 621	4 036
Germany	3 221	2 740	...	2858	3 387	4 954 ²
Greece	1 002 ¹	...	...	...	605	414
Ireland	...	...	...	...	269	289
Italy	2 067 ¹	1 620	1 178 ¹	965	1 561	1 447
Luxembourg	—	—	—	—	—	—
Netherlands	1 144 ¹	—	—	—	2 200	2 117
Portugal	304 ³	...	105 ¹	77	229	139
Spain	3 311	...	668 ⁴	643	2 064	1 393
Sweden	1 000 ¹	928	...	...	262	164
United Kingdom	2 257 ¹	984	...	904	1 612	1 355
EUR 15	21 175*	...	...	...	18 700	18 500*

1. 1989.

2. 1992.

3. 1987.

4. 1986.

8.6. Motor Vehicles Manufacturing

CIS

Until the early 1990s there was a steady increase in the production of both light and heavy vehicles. At that time, the motor vehicle industry was characterized by a high degree of specialization and subcontracting between manufacturers and components suppliers. When these arrangements collapsed with the dissolution of the planned economy, the industry, which had been growing at a steady pace before, recorded an abrupt downturn in the output of both cars and lorries.

Car production is concentrated in Russia (87%) and Ukraine (13%). Overall output decreased by about 13% over 1990–1993, but would have dropped even further, if it had not been for the pent-up demand throughout the CIS. Lorry

production fell more significantly, by 20%, during the same period. The main producers — Russia (90% of CIS lorry production), Ukraine, and Belarus — reported lower losses and already show signs of recovery. By contrast, output collapsed by 80% in Kyrgyzstan, and practically came to a standstill in Armenia, Azerbaijan, and Georgia.

Russia exported 290 000 passenger cars in 1993, about 106 000 less than in 1992. Eastern European countries (Bulgaria, Hungary, Slovenia, Poland, Czech Republic) absorbed 30% of these exports. During 1990–1993 lorry exports decreased by 14% to about 12 000 units. The main markets were China (over 50% of lorry exports) and the People's Republic of Korea (12%).

EU

In 1993, 11.1 million cars were produced in the EU. Automobile manufacturing is concentrated in France, Germany, Italy, Spain, and the United Kingdom, which together produce 93% of the cars in the EU. The industry is highly concentrated, with the top six manufacturers controlling about three-quarters of the market.

During 1990–1993, EU car output dropped by 18%, mostly because of the steep downturn in Italy (–40%), and significant declines in Germany (–19.5%), and France (–14%). Production also fell in the United Kingdom (–12%), although at this time Japanese manufacturers were investing in new plant, and in Spain (–10%), where domestic consumption had peaked in the late 1980s.

EU production of lorries fell by 31% to just under 1.3 million units during the same period. All

major producing countries experienced significant falls: Italy (–39%), France (–33%), Spain (–30%), United Kingdom (–29%), and Germany (–25%).

The persisting recession and overall market saturation is forcing EU manufacturers to expand their operations abroad, especially North America, Asia, and eastern and central Europe; they also enter into strategic alliances with foreign partners. The intention is to achieve synergy and economies of scale through joint research efforts and cooperation in purchasing, components manufacturing, and marketing. Development of environment-friendly vehicles for city traffic is also a priority.

8.6. Motor Vehicles Manufacturing

1990, 1993
(production, 1 000)

	Passenger cars		Lorries	
	1990	1993	1990	1993
Armenia	—	—	6	1
Azerbaijan	—	—	3	0.0
Belarus	—	—	42	31
Georgia	—	—	6	0.5
Kazakhstan	—	—	—	0.5
Kyrgyzstan	—	—	24	5
Moldova	—	—	—	—
Russia	1 103	956	665	559
Tajikistan	—	—	—	—
Turkmenistan	—	—	—	—
Ukraine	156	140	28	23
Uzbekistan	—	—	—	—
CIS 12	1 259	1 096	774	620
Austria	5	41	6	4
Belgium	336	373	50	33
Denmark	—	—	—	—
Finland	—	—	—	—
France	3 295	2 836	474	320
Germany	4 661	3 753	316	237
Greece	—	—	—	—
Ireland	—	—	—	—
Italy	1 875	1 117	246	150
Luxembourg	—	—	—	—
Netherlands	121	80	17	6
Portugal	—	—	—	—
Spain	1 679	1 505	374	261
Sweden	336	279	74	58
United Kingdom	1 296	1 146	270	193
EUR 15	13 604	11 130	1 827	1 262

Chapter 9

Energy

Key Facts (1993)

CIS 12

EUR 15

Production of main fuels

Crude oil (mn t)

392.1¹

117.4³

Coal (mn t)

539.2²

185.0³

Natural gas (bn m³)

755.0¹

200.5

Electricity generation (bn kWh)

1 433.0²

2 108.6⁴

Conventional thermal

994.5²

1 050.1

Nuclear

194.5

748.5

Hydroelectric

234.5²

306.7

1. Excluding Azerbaijan.

2. Excluding Georgia.

3. 1992.

4. Net production.

CIS

Energy is a key element of economic development and, for many CIS countries, energy-related materials are major export earners. Four countries (Kazakhstan, Russia, Ukraine, and Uzbekistan) are producers of all major types of fuel (oil, natural gas, and coal). Russia is by far the largest producer in the CIS (88% of oil, 81% of natural gas, and 57% of coal output). Significant quantities of fuels are also produced in other countries: oil (Azerbaijan, Kazakhstan), coal (Kazakhstan, Ukraine), and natural gas (Turkmenistan, Ukraine, Uzbekistan).

The CIS countries depend on natural gas and oil to satisfy 80% of their energy needs. But oil output declined in all the producing countries (except Uzbekistan) during 1991–1993: Russia (–31% to 354 million t); Ukraine (–19% to 4 million t), Turkmenistan (–13% to 5 million t), and Kazakhstan (–11% to 23 million t). The main causes of this deteriorating situation are worsening geological conditions of extraction, slow introduction of new extraction capacity, and insufficiently advanced technology for exploiting existing sites (only 10–12% of the oil is extracted using modern technology). During 1993 the number of new oil fields also declined in Russia (–5%), Turkmenistan (–10%), and Azerbaijan (–26%).

Losses were also reported in the coal sector where, during 1991–1993, output declined significantly in the main coal-producing countries (Kazakhstan, –15%; Russia, –23%; Ukraine, –30%; Uzbekistan, –41%; and Kyrgyzstan, –54%). Until 1992 production losses for oil and coal were partly compensated by an increased use

of natural gas. But output of natural gas has also declined: Russia (–3% to 620 billion m³), Turkmenistan (–26% to 65 billion m³), and Ukraine (–32% to 19 billion m³).

Fuels represent an important source of income for many CIS countries. Russia, the largest exporter, sells its fuels mainly to third countries. In 1993, only 29% of the country's coal exports went to other CIS countries (35% for oil, 44% for natural gas). Russia's deliveries to third countries rose considerably (oil, +21% to 80 million t; coal and gas, +9% to 20 million t and 96 billion m³, respectively) despite an overall decline in its exports. The main importers of Russian fuel are the EU (56–57% of total extra-CIS oil and gas exports) and central and eastern European countries (22% of oil and 34% of gas exports).

By contrast, in 1993, Kazakhstan and Turkmenistan exported their surplus fuels mainly to other CIS countries: 93% of oil and 98% of coal exports for Kazakhstan, and 85% of natural gas exports for Turkmenistan. Russia is the main buyer of oil and coal from Kazakhstan; Turkmenistan sells its gas mainly to the Ukraine.

During 1993 Kazakhstan exported a total of 12.9 million t of oil (compared with 18.4 million t in 1992) and 34.7 million t of coal (compared with 42.6 million t in 1992). Turkmenistan exported 54.2 billion m³ of natural gas (compared with 49.3 billion m³ in 1992).

Oil exports from Belarus declined by 73% to 284 million t during 1992–1993, mainly because of fewer deliveries to other CIS countries, whose share in total oil exports from Belarus decreased from 82% to 47%.

EU

Since the second oil crisis in 1979, the Member States governments and the European Commission have increasingly coordinated their efforts to reduce oil imports and to match energy supplies with consumption patterns. The aim is to stabilize energy flows into the EU and simultaneously exploit all possible energy-saving potential with a view to reduce the burden on the environment. Additionally, pan-European energy networks are planned to facilitate flows from surplus to deficit areas (e.g. electricity supply links from Italy to Greece, from France to Italy, from Spain to Portugal).

In 1993 the EU produced almost 700 million tep of primary energy, which represented 52% of internal consumption (1336 million tep); the rest had to be covered by imports from third (extra-EU) countries. Since the early 1970s, EU dependence on foreign supplies has decreased by 12 percentage points (from 64% to 52%), owing to increased oil output from the United Kingdom, expansion of the French nuclear power programme, and drastic energy-saving measures across the EU. Today, the dependence level in the EU is comparable to that in the United States, where imports (especially oil) have steadily risen over the past two decades to reach about half of domestic consumption. The Middle East (oil) and the CIS (natural gas) are major supplying regions.

Most EU Member States, except for the United Kingdom and the Netherlands, are large net energy importers. But the dependence ratio varies greatly between the different groups of countries. Domestic production represents merely 1–18% of consumption in countries like Luxembourg, Denmark, Portugal, and Italy.

These countries are most vulnerable to fluctuations in energy prices or supplies, despite efforts to raise production and cut consumption. France and Germany occupy middle positions; 52–53% of their consumption is covered through supplies from abroad. At 37%, Sweden's import dependence is much lower than that of its Scandinavian neighbours Finland (63% of energy needs covered by imports) and Denmark (91% of imports), as the country has embarked on a comprehensive scheme to develop nuclear, hydroelectric, and alternative energy sources.

Domestic production has increased in most countries for all types of energy: oil (United Kingdom), natural gas (Denmark, Greece, Netherlands), nuclear power (France) or thermal energy (Germany). In 1993, nuclear energy — which represented 27% (188 million tep) of total EU energy production — overtook other sources of energy, in particular coal and lignite (25% of total production), natural gas (21%), and oil (17%). Renewable sources of energy (solar, wind) accounted for roughly 10% of EU production, but their share has been rising steadily.

In 1993, about 47% of nuclear energy in the EU was generated in France, which exported its surplus to its neighbours. The United Kingdom was the largest oil producer in the EU (93 million t, 79% of EU total). The Netherlands produced 42% (84 billion m³) of the natural gas output in the EU output, making it the second most important source of gas for the EU (11% of EU gas demand) after the CIS (15% of EU gas demand). Natural gas from Algeria met 10% of the EU gas demand in 1993. Germany is the biggest buyer of natural gas; about one-third of its domestic needs are met

9.1. Production and Supply of Major Fuels

through supplies from the CIS, and 20% each from the Netherlands and Norway.

Coal production has been decreasing in all Member States. The United Kingdom and Germany, by far the two largest producers, recorded losses of 5 and 4 million t, respectively. But the share of these two countries in total EU output remained stable at 85% during 1990–1993. Heavy state subsidies will not prevent the closure of more coal mines in the coming years and a further drop in coal output is expected for the second half of the 1990s. To benefit from lower prices, certain EU countries have already resorted to imported coal from the United States, South Africa, and Australia. Coal is also challenged by alternative, less polluting sources of primary energy, especially wind power and geothermal energy.

Despite substantive decreases of imports over the past few years, oil remains the primary source of energy in the EU (43% of total consumption in

1993), followed by solid fuels—coal and lignite (21%)—natural gas (18%) and nuclear power (14%). Alternative energy sources such as geothermal, wind energy and biomass-based fuels represent about 4–5% of total energy consumption. This share increased slightly with the accession of the Scandinavian members, which strongly promote renewable energy sources.

In most industrial and service sectors, energy consumption has declined since the last oil shock in 1979. The transport sector (32% of total energy consumption), manufacturing industries (29%), and private households (28%) are the most important users. Oil is mainly absorbed by the transport sector (55%) because of the importance of private cars and lorries, and to a lesser extent by private households (23%), and industry and power stations (11% each).

9.1. Production and Supply of Major Fuels

1990, 1993

Fuel production:

	Crude oil (mn t)		Coal (mn t)		Natural gas (bn m ³)	
	1990	1993 ¹	1990	1993 ¹	1990	1993
Armenia	—	—	—	—	—	—
Azerbaijan	12.5	...	—	—	9.9	...
Belarus	2.1	2.0	—	—	0.3	0.3
Georgia	0.2	0.1	1.0	...	0.1	0.0
Kazakhstan	25.8	23.0	131.4	111.9	7.1	6.7
Kyrgyzstan	0.2	0.1	3.7	1.7	0.1	0.0
Moldova	—	—	—	—	—	—
Russia	516.2	353.9	395.4	305.9	640.6	618.4
Tajikistan	0.1	0.0	0.5	0.2	0.1	0.1
Turkmenistan	5.7	4.9	—	—	87.8	65.3
Ukraine	5.3	4.2	164.8	115.7	28.1	19.2
Uzbekistan	2.8	3.9	6.5	3.8	40.8	45.0
CIS 12	570.9	392.1²	703.3	539.2³	814.9	755.0²
Austria	1.2	1.2	—	—	1.4	1.5
Belgium	—	—	1.0	0.2	—	—
Denmark	6.0	7.8	—	—	2.7	4.5
Finland	—	—	—	—	—	—
France	3.0	2.9	10.5	9.5	3.0	3.5
Germany	3.6	3.3	76.5	72.2	23.1	18.7
Greece	0.8	0.7	—	—	0.1	0.1
Ireland	—	—	0.0	0.0	2.3	2.7
Italy	4.7	4.5	0.1	0.1	17.1	19.4
Luxembourg	—	—	—	—	—	—
Netherlands	4.0	3.3	—	—	71.8	84.0
Portugal	—	—	0.3	0.2	—	—
Spain	0.8	1.1	19.4	18.6	1.3	0.6
Sweden	—	—	0.0	0.0	—	—
United Kingdom	89.6	92.6	89.3	84.2	49.6	65.5
EUR 15	113.7	117.4	197.1	185.0	172.4	200.5

1. For EUR 15: 1992.

2. Excluding Azerbaijan.

3. Excluding Georgia.

9.2. Electricity Generation and Distribution

CIS

Total electricity generation in the CIS decreased by 14% to 1433 billion kWh during 1990–1993, mainly because of a sharp contraction of output from conventional power plants. Almost 70% of total electricity was generated in conventional (thermal) plants in 1993, compared with 50% in the EU. The share was higher in countries such as Belarus, Moldova, and Turkmenistan (95–100%), and Uzbekistan and Kazakhstan (85–90%). In most CIS countries, thermal plants operate below normal capacity owing to problems linked to the supply of input materials (coal, gas, and fuel oil).

In 1993 output from nuclear power plants stagnated at the 1990 level. These plants are

located only in Russia (12% of domestic electricity generation) and Ukraine (33%). During 1990–1993, hydroelectric power generation rose slightly in most CIS countries (average annual increase of 6%), except in Belarus and Kyrgyzstan.

Many power plants are still not economical in the CIS. Constraints include high depreciation rates for existing equipment and lack of capital to build new plants. The inefficient grid infrastructure leads to estimated annual losses of about 130 billion kWh (9% of total production). In certain countries the losses are even higher: Azerbaijan (20% of national production), Kyrgyzstan (16%), and Kazakhstan and Tajikistan (each 12%).

EU

EU electricity generation stood at 2.1 trillion kWh in 1993 (1.5 times the CIS level). Three countries accounted for almost 60% of this total: Germany (23%), France (21%), and the United Kingdom (14%). In the 1980s France increased its electricity output significantly by embarking on a government-backed nuclear programme to reduce its dependence on energy imports. Today, over 75% of France's electricity is generated by nuclear power plants (compared with 24% in 1980).

Thermal plants are important producers of electricity: the Netherlands (95% of electricity

output), Italy (88%), the United Kingdom (72%), Germany (66%). Hydroelectric stations supply 52% of the electricity in Sweden.

EU electricity consumption for the 15 Member States amounted to 1.9 trillion kWh in 1992 (up by one-third compared with 1980). The industrial sector was the largest consumer (43% of total consumption, against 49% in 1980). Only about 3% of electricity was used by the transport sector, especially trains for long distances and tramways for city traffic.

9.2. Electricity Generation and Distribution

1990, 1993
(bn kWh)

Electricity generation:

	Total		Conventional thermal		Nuclear		Hydroelectric	
	1990	1993	1990	1993	1990	1993	1990	1993
Armenia	10.4	6.3	8.8	2.0	—	—	1.6	4.3
Azerbaijan	23.2	19.0	21.5	16.5	—	—	1.7	2.4
Belarus	39.5	33.4	39.5	33.4	—	—	0.0	0.0
Georgia	14.2	9.7	6.6	...	—	—	7.6	...
Kazakhstan	87.4	77.4	80.0	69.8	—	—	7.4	7.6
Kyrgyzstan	13.4	11.1	4.4	2.2	—	—	9.0	8.9
Moldova	15.7	10.4	15.4	10.0	—	—	0.3	0.4
Russia	1 082.2	956.6	797.0	662.2	118.3	119.2	166.8	175.2
Tajikistan	18.1	17.7	1.2	0.6	—	—	16.9	17.1
Turkmenistan	14.6	12.6	14.6	12.6	—	—	0.0	0.0
Ukraine	298.5	229.9	211.6	143.4	76.2	75.2	10.7	11.2
Uzbekistan	56.3	49.1	49.7	41.8	—	—	6.6	7.3
CIS 12	1 673.5	1 433.2	1 250.3	994.5¹	194.5	194.4	228.6	234.5¹
Austria	48.9	51.2	16.3	13.8	—	—	32.0	37.4
Belgium	67.2	67.1	25.7	26.4	40.5	39.7	0.9	1.0
Denmark	24.0	32.0	23.4	30.9	—	0.7	1.1	
Finland	51.6	58.1	22.8	25.9	18.1	18.8	10.8	13.5
France	399.7	452.9	45.1	32.2	297.9	350.0	57.2	70.6
Germany	419.0	491.4	261.6	325.8	139.2	144.1	18.2	21.6
Greece	32.1	35.3	30.2	32.7	—	2.0	2.5	
Ireland	13.6	15.4	12.7	14.4	—	—	1.0	1.0
Italy ²	205.2	211.3	167.6	163.8	—	—	34.6	44.1
Luxembourg	1.3	1.0	0.5	0.6	—	—	0.8	0.5
Netherlands	69.4	72.8	85.9	68.9	3.3	3.7	0.2	0.2
Portugal	27.3	28.2	18.1	19.8	—	—	9.1	8.4
Spain	144.3	148.9	65.5	69.8	52.0	53.6	25.9	25.5
Sweden	142.5	141.4	5.0	8.9	65.2	58.8	72.3	73.8
United Kingdom	299.4	301.6	233.8	216.2	58.7	79.8	6.0	5.5
EUR 15³	1 945.5	2 108.6	1 014.2	1 050.1	674.9	748.5	271.7	306.7

1. Excluding Georgia.

2. Including production of geothermal electrical energy (3.0 billion kWh in 1990, 3.5 billion kWh in 1993).

3. For EUR 15: net production.

Retail trade

Key Facts (1993)	CIS 12	EUR 15
Retail outlets (1 000)	638.6 ¹	4 006.2*
Outlet density (per 10 000 inhabitants)	23	108*
Retail employment (mn)	5.1 ¹	15.1
Retail sales index (1990=100)		
Total sales volume (1994)	49.0	100.8 ²
Total sales volume (1993)	52.8	100.3 ²
– Food, beverages, and tobacco	58.3	102.3
– Clothing and footwear	31.1	97.1
– Household equipment	42.8	98.9

1. Including stands and kiosks.

2. EUR 12.

10.1 Retail Trade Structure: Outlets and Employment

CIS

The gradual conversion to a market economy has led to substantial organizational changes in CIS retailing. Privatization of state property (shops) and adaptation to market disciplines have been faster than in other economic sectors. Between 1990 and 1993 the proportion of private retailers rose from 36% to 64% in Azerbaijan, from 49% to 71% in Russia, from 57% to 71% in Ukraine, and from 59% to 77% in Kyrgyzstan.

Private enterprises managed to expand their sales considerably, most of all in Russia where non-state (registered and non-registered) enterprises accounted for just under 80% of retail

turnover compared with only 23% in 1990. This trend was also noticeable in the other countries (which reported sales only for the officially registered private sector): Central Asian republics and Moldova (from 40–50% in 1990 to 46–72% in 1993) and Belarus, Kazakhstan, and Ukraine (from 30–35% to 44–58%).

Retail density is much lower in the CIS than in the EU—23 compared with 108 outlets per 10 000 inhabitants. It was slightly higher in Azerbaijan, Belarus, and Ukraine (27–34), and lower in Tajikistan, and Turkmenistan (17–19).

EU

In 1993, about 4.5 million enterprises were engaged in commerce (retailing and wholesaling) in the 15 Member States; almost 80% of these were predominantly retailers. The retail sector alone represents about 25% of all registered enterprises in the EU and consists of 4 million outlets. Retailing generates 10% of the GDP (turnover of about ECU1400 billion) and employs 10% of the total EU workforce (15 million people, 3 times the CIS level).

The countries with larger number of outlets are: Italy (almost 1 million outlets), Germany (601 000), France (546 000) and Spain (523 000). In terms of outlets per 10 000 inhabitants, the highest outlet densities are found in the Mediterranean region, where small neighbourhood stores are still frequent (Portugal, 192; Greece, 184; Italy, 171). By contrast, densities are

much lower in northern European countries—Germany (74), Finland (79), the Netherlands (80), and the United Kingdom (81)—because of higher concentration levels, which also translates as larger store size. In fact, sales area per outlet is almost double the EU average of 90–120 m² in Germany and the United Kingdom.

Concentration was stimulated by the expansion and acquisition policies of chain operators across the EU. In certain sectors (e.g. food, do-it-yourself), large retail groups in France, Germany, and the United Kingdom have become so powerful that they tend to bypass wholesaler-importers and purchase directly in large quantities from manufacturers. They are also investing substantially in new opportunities for growth and business development in southern Europe, especially Spain and Italy, and overseas.

10.1 Retail Trade Structure: Outlets and Employment

1993

	Number of outlets ^{1,2} (1 000)	Outlet density ^{1,2,4}	Average sales area per outlet (m ²)	Persons employed ¹ (1 000)
Armenia	8.3	22	91	35.1
Azerbaijan	25.1	34	74	90.2
Belarus	30.7	30	107	227.1
Georgia	...	...	...	...
Kazakhstan	36.0	21	109	211.8
Kyrgyzstan	10.0	22	104	49.1
Moldova	8.9	21	93	50.9
Russia	316.7	21	125	3 180.6
Tajikistan	10.0	17	85	40.0
Turkmenistan	8.3	19	94	49.8
Ukraine	141.2	27	101	870.7
Uzbekistan	43.4	20	87	265.3
CIS 12	638.6	23	112	5 070.6
Austria	52.5	69	...	254.0
Belgium	140.0*	141	...	274.7
Denmark	51.5	100	...	199.7
Finland	39.7	79	...	208.0
France	546.1	97	137	2 090.0
Germany	601.0	74	200 ³	3 366.5
Greece	184.9	184	...	338.2
Ireland	31.7	90	93	131.4
Italy	983.0	171	71	2 401.0
Luxembourg	4.4	116	118	18.1
Netherlands	119.4	80	138	637.5
Portugal	190.0*	192	...	366.3
Spain	523.2	134	...	1 434.0
Sweden	72.2	85	...	305.0
United Kingdom	466.6*	81	...	3 030.0
EUR 15	4 006.2*	108	...	15 054.4*

1. For CIS 12 : including stands and kiosks.

2. For EUR 15 : 1990-1993.

3. 1985, former territory of Federal Republic of Germany excluding units with turnover below 20 000 DM.

4. Number of outlets per 10 000 inhabitants.

10.2. Trends in Retail Sales

CIS

During 1990–1994 retail sales increased in value but not in volume. This results from a combination of factors: falling consumer goods production, price increases, and declining personal disposable income. Retail sales volume (in physical terms) of registered retailers declined by about 50% in Belarus, Uzbekistan, and Ukraine. The losses were even higher in Kazakhstan, Kyrgyzstan, Moldova, and Turkmenistan, where sales volumes were 4 to 6 times lower in 1994 than in 1990. Retail sales

plummeted in Tajikistan (9-fold decrease) and Azerbaijan (12-fold decrease).

In view of the steep price increases for food products and shortage of personal disposable income for most categories of the population, an ever-increasing proportion of total household expenditure is being devoted to food. In most states, 53–70% of the 1993 retail turnover was obtained from food products, compared with 42–48% in 1990.

EU

During 1990–1994, retail sales stagnated or increased only slightly in most EU Member States, except in a few countries: Ireland (+9%), United Kingdom (+7.3%), the Netherlands (+2.9%), and Luxembourg (+2.3%). During the same period, retail sales contracted in Greece (–9%), Belgium (–5%), and Italy (–4%).

However, retail sales developed differently according to the segment across the EU. In 1994, food sales were above-average in the United Kingdom (+11.1%, compared with 1990) and Ireland (+8.8%), also because of efficient sales organization and expansion by the large retail groups. Household equipment (including white goods and furniture) sales were

buoyant in Ireland (+17.7%), the United Kingdom (+13%), Germany (+5.1%), and the Netherlands (+5%). By contrast, clothing and footwear retailers in Luxembourg (–24.1%), in Italy (–16.8%), and in Belgium (–12.6%) reported the highest losses.

In the EU, shopping behaviour is generally marked by seasonal fluctuations. In the northern Member States, retail sales usually peak at the end of the year, when large purchases are made for the Christmas holidays and during the following sales period (January-February). The summer months are usually quieter, not least because many holidaymakers leave for southern Europe, where their purchases benefit the local retailers.

10.2. Trends in Retail Sales

1991-1994
(in constant prices)

	1991	1992	1993	1990 = 100 1994
Armenia	75.1	21.9	13.5	8.5
Azerbaijan	79.2	32.9	17.1	8.3
Belarus	91.9	71.7	61.5	48.1
Georgia	68.4	15.7	4.7	3.5
Kazakhstan	84.4	56.2	46.7	23.3
Kyrgyzstan	75.1	30.8	26.0	22.9
Moldova*	81.9	41.4	25.6	15.6
Russia ¹	92.8	60.0	60.6	58.2
Tajikistan	78.8	20.4	16.0	10.9
Turkmenistan	84.6	54.0	51.0	22.1
Ukraine	90.3	74.0	48.1	45.5
Uzbekistan	79.3	43.7	50.2	41.1
CIS 12	90.0	58.5	52.8	49.0
Austria	...	...	...	...
Belgium	98.8	99.7	95.1	95.0
Denmark	102.3	101.3	102.0	107.4
Finland	...	...	...	...
France	100.4	100.6	101.9	104.0
Germany	105.1	104.4	100.0	97.9
Greece	93.6	93.6	90.3	90.9
Ireland	99.8	102.8	104.6	109.0
Italy	99.2	99.2	98.1	96.3
Luxembourg	102.3	99.8	102.4	102.3
Netherlands	102.1	102.8	103.0	102.9
Portugal	...	...	...	...
Spain	...	...	...	...
Sweden	...	...	...	...
United Kingdom	98.6	99.1	102.6	107.3
EUR 15²	100.9	100.9	100.3	100.8

1. Values are higher (1991: 96.8%, 1992: 93.4%, 1993: 95.2%, 1994: 95.3%) if sales estimates of itinerant trade, street sellers, food and mixed markets, etc. are included.

2. EUR 12: estimates are based on annual averages, which in most cases do not include openings of new stores; figures may therefore be underestimated by up to 20% in certain countries.

Transport and Communications

Key Facts (1993)	CIS 12	EUR 15
Infrastructure (1 000 km)		
Railway network	142.1	158.0*
Road network	950.0*	3 089.2
Inland waterways	112.8	29.7*
Infrastructure density (km/1 000 km ²)		
Railway density	6.4	49.4
Road density	43.0*	965.7
Inland waterways	5.3	9.3
Freight carried ² (mn t)		
Rail	2 310.2 ¹	902.7*
Road	2 378.4 ¹	9 806.6*
Inland waterways	254.8	594.3*
Sea	119.0 ¹	64.9 ⁴
Air (1 000 t)	1 063.7 ¹	7 090.1*
Private passenger cars		
Total cars in use (mn)	19.0 ¹	145.9 ⁴
Per 1 000 inhabitants	68.0 ¹	395.0 ⁴
Telecommunications		
Residential main lines (mn)	29.0*	131.8 ⁴
Line density (lines/100 persons)	10.0*	36.0
Postal services		
Number of post offices (mn)	87.2 ¹	112.8*
People served/post office	3 200 ¹	3 300
Letters sent (bn)	3.6 ¹	83.3 ³

1. Excluding Georgia.

2. For CIS 12: only general public transport.

3. Excluding the Netherlands.

4. 1992.

11.1. Role of Transport in the Economy

CIS

Transport plays a vital role in the development of a market economy; it provides the basis for the intensification of international links and trade across the CIS. At the time of the former Soviet Union, the transport sector of was organized as a coherent system for the entire territory. The sector is in fact still governed by provisions, technical norms, and documents dating back to the time before the establishment of the CIS.

The establishment of customs points has caused serious delays in the movement of passengers and goods. Transport authorities in the CIS countries, which respond directly to the needs of the economy and the interest of operators, have signed bilateral and multilateral agreements to ensure smooth flow in all modes of transport.

A number of interstate bodies were also instituted for this purpose:

- Coordinated Transport Conference of Ministers of Transport
- Railway Transport Council
- Council for Aviation and Use of Airspace
- Interstate Consultative Council on Radio Navigation
- Interstate Road Maintenance Council

These bodies are responsible for implementing a common interregional transport policy, for developing and streamlining the existing transport network (especially for goods), and for harmonizing transport legislation and regulations.

EU

The transport sector contributes about 4–5% to both GDP and overall employment in the EU. The establishment of the single market on 1 January 1993 resulted in further growth of intra-EU passenger and goods traffic. A common transport policy was launched to streamline transport infrastructure and to harmonize differences in national legislation (Art. 75, Union Treaty). According to the Treaty, the Council (Ministers of Transport) lays down common rules for EU and non-EU carriers, following a proposal from the Commission. The Council also takes appropriate measures for improving transport safety and providing financial support for a new trans-European networks scheme in transport and telecommunications.

A major objective is to improve links between national networks and to integrate the different modes (rail, road, air) more efficiently, and to reduce traffic congestion and air pollution. The scheme also aims to bring peripheral regions closer

to hub areas and to improve transfrontier links between the EU and central and eastern Europe.

The Commission plans to allocate up to ECU20 billion annually to the common transport policy. But Member States expect to raise additional revenue for their national budgets through privatizations, especially in air transport and telecommunications.

Priority projects, which are expected to receive funding, include:

- a new rail connection through the Alps (indicative cost of ECU10 billion)
- a high-speed train link between Paris and Berlin (ECU8.5 billion)
- an air traffic management system for Europe (ECU8 billion).

A motorway connection from Berlin to Moscow via Warsaw is also planned; work on this project is to begin later on in the 1990s.

11.2. Transport Infrastructure

CIS

As of early 1994, the CIS had a large network of railways (142 000 km), roads (about 950 000 km), and inland waterways (113 000 km). The largest part of this infrastructure is located in Russia: over 60% of railway lines; over 50% of roads; and about 90% of inland waterways. The highest railway densities (34–38 km/1000 km²) are found in Ukraine and Moldova, followed by Armenia, Azerbaijan, Belarus, and Georgia (23–27 km/1000 km²). Road density is also highest in these countries (240–280 km/1000 km²), but it is still considerably below the EU average (966 km/1000 km²).

The road system in the CIS countries is still poorly developed and badly maintained. Recently

a few countries launched special road funds based on compulsory taxes to be paid by all firms, organizations, and vehicle owners. This way, valuable sources of finance have been tapped to develop road infrastructure and to repair roads.

The main waterways are located in Moldova, Russia, and Ukraine. Formerly they were the least costly mode of transport, but they have become less cost-effective now owing to tariff hikes. Their importance as a mode is declining both for passenger and goods transport. Moreover, the waterways, canals, and dikes need to be repaired in most CIS countries.

EU

The EU transport infrastructure is among the densest in the world. The single market and the opening of borders in Central Europe have encouraged mobility. However, there has also been a general surge in road and air traffic, exerting severe pressure on the current infrastructure (especially motorways, airports) in practically all Member States.

France and Germany have by far the largest railway and road systems, followed by the United Kingdom and Italy. Together, these four countries account for about 70% of the EU railway lines and 73% of the roads. In 1993 the Netherlands had the densest road network in the EU (2 580 km/1000 km²); it was about twenty times as dense as that in Portugal, which had the lowest road density. Germany had the highest railway density (114 km/1000 km²), followed by Belgium

(110 km/1000 km²) and Luxembourg (100 km/1000 km²). Compared with their areas, the new Scandinavian members have a sparse railway network (Sweden: 22 km/1000 km²; Finland: 18 km/1000 km²).

The development of modern high-speed rail links in countries like France, Germany, and Spain has revived rail transport (especially for passenger transport). On medium range distances (300–500 km), high-speed speed trains are already competing with air transport, which however remains the main mode for long distance business travel and tourism.

Inland waterways are important in France (8 500 km), Finland (6 200 km), the Netherlands (5 000 km), and Germany (4 600 km). The main rivers for goods transport are the Rhine (navigable on 1000 km), Danube, Elbe, Oder and Mosel.

11.2. Transport Infrastructure

1993
(at the end of the year)

	Railway network		Road network		Inland waterways	
	Total (1 000 km)	Density per 1 000 km ² (km)	Total (1 000 km)	Density per 1 000 km ² (km)	Total (1 000 km)	Density per 1 000 km ² (km)
Armenia	0.8	27.9	7.7	258.4	—	—
Azerbaijan	2.1	23.9	24.3	280.6	—	—
Belarus	5.6	26.8	50.5	243.3	2.6	12.4
Georgia	1.6	22.8	...	...	—	—
Kazakhstan	14.4	5.3	87.9	32.3	4.0	1.5
Kyrgyzstan	0.3	1.6	...	...	0.5	2.3
Moldova	1.2	34.3	9.2	273.2	0.7	19.4
Russia	87.1	5.1	489.0	28.6	100.7	5.9
Tajikistan	0.5	3.4	13.0 ¹	91.1	—	—
Turkmenistan	2.2	4.4	13.6	27.9	0.7	1.5
Ukraine	22.8	38.0	170.5	282.4	3.6	6.0
Uzbekistan	3.5	7.8	43.2	96.6	—	—
CIS 12	142.1	6.4	950.0*	43.0*	112.8	5.3
Austria	6.1	72.6	35.6	423.8	0.4 ³	4.8
Belgium	3.4	109.7	15.8	509.7	1.9	61.3
Denmark	2.3	53.5	71.0	1 651.2	—	—
Finland	5.9	17.5	76.8	227.9	6.2 ³	18.4
France	33.6	61.2	915.7	1 667.9	8.5	15.5
Germany	40.8	114.3	639.8	1 792.2	4.6	12.9
Greece	2.5	18.9	81.2	615.2	—	—
Ireland	1.9	27.1	92.4	1 320.0	—	—
Italy	16.0 ²	53.2	303.5	1 008.3	1.4 ³	4.7
Luxembourg	0.3	100.0	5.2	1 733.3	0.0	13.3
Netherlands	2.8	68.3	105.8	2 580.5	5.0 ³	122.0
Portugal	3.1	59.6	66.1	127.1	0.1 ³	1.9
Spain	12.5 ¹	24.8	158.8	314.5	—	—
Sweden	9.9	22.0	135.0	300.0	0.4 ³	0.9
United Kingdom	16.9	69.3	386.5	1 584.0	1.2 ³	4.9
EUR 15	158.0*	49.4	3 089.2	965.7	29.7*	9.3

1. 1990.
2. 1988.
3. 1991.

11.3. Freight Carried

CIS

In 1993 the total volume of freight carried (excluding pipelines) in the CIS amounted to around 5.1 billion t (road, 2.4 billion t; rail, 2.3 billion t; inland waterways, 255 million t; sea, 119 million t; and air, over 1 million t). During 1990–1993 the volume of goods freighted was halved owing to falling production levels, disruption of trade links between companies, financial difficulties, and high inflation rates. All

modes showed negative growth: inland waterways and air (–62% each), road (–60%), rail (–39%), and sea (–35%).

The shares of the different modes of transport for goods haulage have changed significantly. While railways increased their share from 36% in 1991 to 46% in 1994, road haulage fell from 56% to 47%, hampered by high fuel prices and tariffs for lorry transport.

EU

In 1992, over 10.5 billion t of goods were freighted within the Union. Road transport was the most commonly used mode (85%). France, Germany, and the United Kingdom accounted for almost two-thirds of road haulage. Rail transport ranked next in all Member States, except in Belgium and the Netherlands, where inland waterways including rivers play a bigger role. In the Netherlands, around 230 million t of merchandise were forwarded by boat in 1992, more than in any other country in the EU. Inland waterways are of major importance in the EU for the transport of bulk goods such as minerals, fertilizers, and heavy equipment. Manufacturers of consumer goods and food items prefer to use road transport to reach wholesalers, retailers, and consumers up to those in remote areas.

Maritime transport is important for Member States with an extensive coastline and a long

seafaring tradition: Greece (24.5 million t in 1992), Italy (7.7 million t), the United Kingdom (6 million t), and Denmark (5.8 million t). Maritime transport is less important in France (4.2 million t) and Spain (3.2 million t), although both countries have several ports on the Atlantic Ocean and the Mediterranean Sea.

Air transport of goods has become very popular, especially for extra-EU destinations (trans-Atlantic and trans-Pacific routes). It is most important in Germany and the United Kingdom, which together combine about 45% of goods shipped by air in the EU. The Netherlands (709 500 t in 1992) and Luxembourg (151 000 t in 1992) are major hubs for air cargo and therefore reported high freight volume for the size of the countries.

11.3. Freight Carried

	1993 (mn t)				
	Railway transport	Road transport	Inland waterways transport	Maritime transport ⁵	Air transport (1000 t)
Armenia	1.1	2.7	—	—	59.3
Azerbaijan	18.4	21.9	—	6.5	14.6
Belarus	62.2	209.0	8.9	—	3.0
Georgia	...	...	—	...	...
Kazakhstan	261.0	296.4	4.0	—	21.0
Kyrgyzstan	3.0	14.7	0.1	—	1.0
Moldova	4.9	7.8	0.1	—	1.5
Russia	1 347.8	1 110.2	214.7	83.4	915.4
Tajikistan	1.2	12.2	—	—	2.2
Turkmenistan	18.4	46.3	1.6	0.0	14.9
Ukraine	535.0	426.0	25.4	29.1	14.0
Uzbekistan	57.2	231.2	—	—	16.8
CIS 12²	2 310.2¹	2 378.4¹	254.8	119.0¹	1 063.7¹
Austria	62.2	196.3	6.8 ⁴	—	78.9
Belgium	53.7	355.2 ⁴	86.0 ³	0.3	329.4 ³
Denmark	5.0	202.2 ³	—	5.8	94.4 ³
Finland	...	...	1.8 ⁴	1.2	80.7
France	110.6	1 272.3	53.9	4.2	983.9 ³
Germany	390.9 ⁴	3 385.4	214.6 ³	5.6	1 756.3 ³
Greece	3.3	212.8	—	24.5	127.5 ³
Ireland	3.1	79.9 ⁴	—	0.2	86.6 ³
Italy	58.1	944.7 ³	0.5 ⁴	7.7	548.2 ³
Luxembourg	12.2	29.4 ³	1.8	1.6	151.0 ³
Netherlands	16.9 ³	474.4	228.9	0.8	709.5 ³
Portugal	7.2	230.3	—	0.7	129.5 ³
Spain	18.9	583.6	—	3.2	430.4 ³
Sweden	52.0 ⁴	254.0 ⁴	...	3.1	158.9
United Kingdom	108.6	1 586.1	...	6.0	1 424.9 ³
EUR 15 *	902.7	9 806.6	594.3	64.9	7 090.1

1. Excluding Georgia.

2. For CIS 12: only general public transport.

3. 1992.

4. 1991.

5. For EUR 15: 1992.

11.4. Car Ownership

CIS

During 1990–1993 the number of private cars increased in most CIS countries, and especially in Belarus, Kazakhstan, Russia, and Ukraine (by 15–28%). At the same time, average vehicle density (cars per 1000 inhabitants) is still 6 times

lower than in the EU. While car density exceeded 70 per 1000 inhabitants in Armenia, Belarus, and Russia, it was only 34–39 in Azerbaijan, Tajikistan, and Uzbekistan.

EU

Statistics for vehicle ownership demonstrate the continuing preference for private cars as the chief means of passenger transport. During 1990–1992, the number of private cars in use in the EU decreased by 1.3% to 146 million. Germany, which had the largest number of passenger cars in use (32 million in 1992), also reported the most

significant decline in the EU since 1990 (–12%). By contrast, the number of private cars is increasing rapidly in certain southern EU countries: Portugal (by 10% during 1990–1992), Italy (by 7%). The highest concentrations were recorded in Italy and Luxembourg (1 car/2 persons).

11.4. Car Ownership

1990, 1993
(at the end of the year)

	Total (1 000)		per 1 000 inhabitants	
	1990	1993 ¹	1990	1993
Armenia	241	277	71	74
Azerbaijan	246	253	34	34
Belarus	580	742	57	72
Georgia	471	..	86	...
Kazakhstan	779	919	46	54
Kyrgyzstan	188	183	42	41
Moldova	201	159	46	43
Russia	8 677	11 099	58	75
Tajikistan	225	196	42	34
Turkmenistan	187	206	50	52
Ukraine	3 272	4 093	63	79
Uzbekistan	837	854	40	39
CIS 12	15 904	18 981²	56	68²
Austria	3 100	3 245	394	416
Belgium	3 970	4 021	398	401
Denmark	1 594	1 605	310	311
Finland	1 910	1 923	380	382
France	23 810	24 020	419	419
Germany	36 515	32 007	458	399
Greece	1 777	1 777 ³	176	173
Ireland	828	859	235	242
Italy	28 200	29 497	488	520
Luxembourg	192	209	498	537
Netherlands	5 569	5 658	371	374
Portugal	2 775	3 050	281	310
Spain	12 537	12 537	322	321
Sweden	3 621	3 619	419	419
United Kingdom	21 515	21 904	374	379
EUR 15	147 913	145 931*	405	395

1. For EUR 15: 1992.

2. Excluding Georgia.

3. 1990.

CIS

A growing flow of information can be observed throughout the territory of the CIS. Expansion, modernization, and overhauling of the existing telecommunications network are critical to serve the needs of the growing private sector and a more demanding public, which expect timely processing and transmission of information. Existing telephone and facsimile lines are being expanded. Optical fiber and digital networks have been introduced, together with ground satellite stations.

Efforts are also being undertaken to promote modern types of telecommunications services such as videotext, electronic mail, and cellular (mobile) telephony.

The total number of private telephone lines increased by 30% (only households) during 1990–1993. An increase was observed in all countries, but expansion was highest in Russia (+43%), which accounted for about 60% of all private telephone lines in the CIS.

EU

The telecommunications sector is most developed in North America and Europe, which together provide about three-quarters of the world's service revenue (US\$400 billion in 1992). In the EU, the contribution of the telecommunications sector to GDP is around 2% and it employs over 1 million people. As a growth sector, it attracts new entrants even from other sectors (e.g. utilities, computer firms, car manufacturers), who are interested in diversifying and exploiting the new business opportunities offered by the telecommunications market.

Private firms mainly operate in the terminal equipment market (e.g. telephone sets, fax machines, videotext equipment), which was

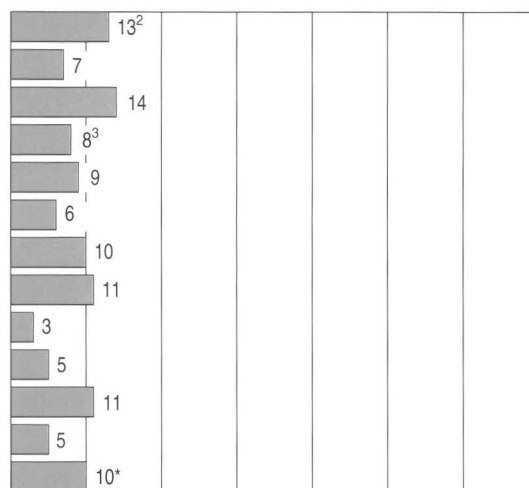
opened to competition in the late 1980s. However, government telecommunications services usually still hold a legal monopoly on basic telephony services and networks. In the United Kingdom and Sweden, basic telephone services have already been liberalized. At EU level, the Council decided to liberalize these services across the Union by 1 January 1998.

The EU-wide telephone network is well-developed. The Scandinavian countries recorded the highest number of lines per 100 population: Sweden (68), Denmark (58), Finland (54). The EU average of 36 lines per 100 persons was almost 3.6 times higher than the CIS figure.

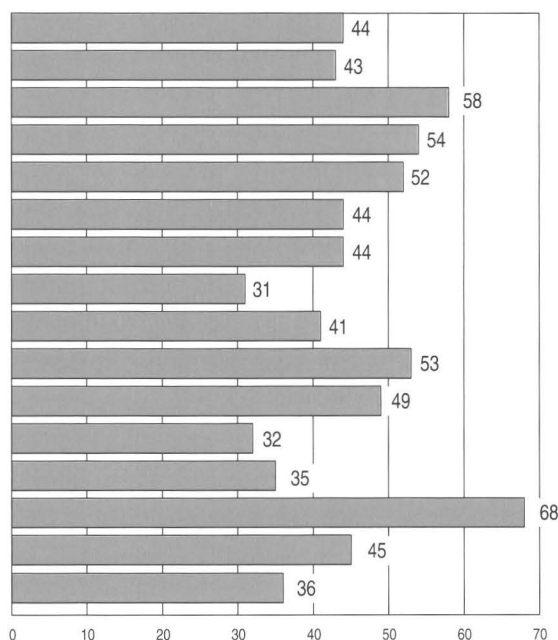
11.5. Telecommunications

1993

	Number of long distance calls ¹ (mn)	Residential main lines	
		Total (1 000)	Per 100 population
Armenia	26.6	486.7 ²	13 ²
Azerbaijan	20.6	532.7	7
Belarus	204.1	1 432.5	14
Georgia	...	457.1 ³	8 ³
Kazakhstan	116.9	1 531.1	9
Kyrgyzstan	33.4	252.1	6
Moldova	64.4	417.1	10
Russia	1 466	16 833.2	11
Tajikistan	10.0	188.0	3
Turkmenistan	12.5	213.8	5
Ukraine	677.4	5 506.6	11
Uzbekistan	68.7	1 158.8	5
CIS 12	2 700.6⁴	29 010.0*	10*



Austria	713.4 ⁵	...	44
Belgium	...	3 326.2	43
Denmark	425.0 ⁵	2 402.3	58
Finland	55.4	2 056.5	54
France	...	26 914.7	52
Germany	1 011.6	31 170.3	44
Greece	...	3 147.6	44
Ireland	90.6 ⁵	756.8	31
Italy	396.0	18 618.3	41
Luxembourg	181.0	144.3	53
Netherlands	334.0	5 916.0	49
Portugal	163.9 ⁵	2 435.2	32
Spain	221.2	10 206.2	35
Sweden	698.0 ⁵	4 616.8	68
United Kingdom	...	20 110.8	45
EUR 15	...	131 822.0	36



1. For EUR 15: 1992 (source — International Telecommunication Union (ITU).

2. 1992.

3. 1990.

4. Excluding Georgia.

5. Minutes.

CIS

In the CIS, postal services are managed by public bodies, which usually depend on the ministries of telecommunications. On average, a post office served 3 200 people. Post office density was highest in Belarus and Russia (less than 3 000 people served), but it was far below the CIS average in Tajikistan, Turkmenistan, and Uzbekistan (more than 6 000 people served).

During 1990–1993 a sharp decline was observed in the number of dispatched parcels (–500%), letters (almost –50%), and telegrams (–40%), owing to a steep rise in prices and tariffs,

and preference for speedier forms of transmission (telephone, fax, electronic mail). Moreover, the newly created customs points have slowed down and occasionally impeded normal movement of mail.

Special courier and express services started operations recently. About 9 800 international dispatches were made from 70 Russian cities during 1993, where such services have already started. Besides, over 1 million courier dispatches were made within the Russian Federation using the state courier services.

EU

Postal services in the EU employed around 1.5 million people in 1992 and contributed about 1% to GDP. Although private operators now exist for express delivery and direct mail services, public post offices still provide the essential services: dispatch of letters, telegrams, and parcels; telephone switches; lines for national and international calls. With the exception of the Netherlands, where the holding company for postal services has been partially privatized, all post offices in the EU are fully state-owned. In June 1995, the EU post ministers agreed to introduce free-market mechanisms by abolishing all monopolies by 1 January 1998. Greece, Ireland, Spain, and Portugal agreed to open their postal markets by 2003.

In 1992, there were about 113 000 post offices in the EU. They served an average of 3 300 persons, which was almost equivalent to the density recorded for the CIS. The lowest post office density was observed in Greece (1 office per

8 300 persons) followed by the Netherlands (6 400), and Belgium (5 500). Density was highest in Denmark (1 100 persons) and Portugal (1 300 persons).

On average each EU citizen received 260 letters (including parcels) in 1990 (650 for the United States). This figure is highest in Denmark and the Netherlands, where each person receives over 400 items per year. On the other hand, in Greece and Portugal the average is below 100 items annually. Italy is the only EU country, where people have still retained the tradition of sending telegrams (26.4 million in 1992). In most other EU countries dispatching telegrams has either never been very important (e.g. Denmark, Luxembourg) or has been gradually replaced by fax messages. Austria and Germany lead in the dispatch of parcels (5 per person annually), whereas Portugal at the other end of the scale has the lowest dispatch rate (less than 1 per person).

11.6. Postal Services

1993

	Number of post offices		Dispatches		
	Total	Post office density ³	Letters ⁶ (mn)	Telegrammes (mn)	Parcels (1 000)
Armenia	815	4.6	9	1	10
Azerbaijan	1 685	4.4	54	2.6	118
Belarus	4 138	2.5	168	4.1	968
Georgia	...	...	...	...	...
Kazakhstan	4 867	3.5	115	10.3	1 118
Kyrgyzstan	945	4.7	14	2	193
Moldova	1 417	3.1	35	1.7	129
Russia	51 219	2.9	2 294	167.5	33 872
Tajikistan	738	7.7	9	1.3	138
Turkmenistan	598	7.3	16	1.2	63
Ukraine	17 200	3.3	857	43.8	6 398
Uzbekistan	3 592	6.2	39	4.8	485
CIS 12¹	87 214	3.2	3 610	240.3	43 492
Austria	2 650	3	2 397	1.2	55 223
Belgium	1 756	5.7	3 326	0.6	...
Denmark	4 596	1.1	1 843	0.04	26 158
Finland	2 255 ⁵	2.2	1 129	0.4	22 370
France	16 855 ²	3.4	25 176	...	...
Germany	22 250 ²	3.6	18 610	7.3	450 518
Greece	1 262	8.2	410	2.1	2 266
Ireland	1 971	1.8	464	0.04	...
Italy	14 411 ²	3.9	6 764	26.4	65 163
Luxembourg	106	3.7	130	0.03	53
Netherlands	2 400	6.4	...	0.4	...
Portugal	7 407	1.3	907	0.9	9 704
Spain	12 985	3	4 654	3.5	515 ⁴
Sweden	1 915	4.6	1 119 ²	0.1	46 212
United Kingdom	19 958 ⁵	2.9	16 364 ²	...	...
EUR 15*	112 777	3.3	83 293⁵	...	...

1. Excluding Georgia.

2. 1992.

3. 1 000 inhabitants served by a post office.

4. Only international dispatches.

5. Excluding Netherlands.

6. Including postcards, printed matter, and small parcels.

External Trade

Key Facts (1993)	CIS 12 ¹	EUR 15
Exports		
Total (bn US\$)	86.6	1 442.1
to CIS (%)	31.5 ²	1.4
to EU (%)	29.0*	61.7 ²
to other countries (%)	39.5*	36.9
Imports		
Total (bn US\$)	62.6	1 406.0
from CIS (%)	43.5 ²	1.6
from EU (%)	28.7*	61.0 ²
from other countries (%)	27.8*	37.4
Balance (bn US\$)	23.9	36.2
Exports per capita (US\$)	309.2	3 900.8
Imports per capita (US\$)	223.7	3 803.0
Exports/imports (%)	138.2	102.6

1. 1994 figures include, for the first time since the formation of the CIS, intra- and extra-CIS trade (excluding Georgia).

2. Intra-regional trade.

CIS

In 1994, the total value of foreign trade of CIS countries was US\$149 billion, 37% of which was accrued from intra-CIS transactions. Trade with third countries or extra-CIS trade amounted to US\$95 billion (an increase of US\$9 billion over 1993). Intra-CIS trade is based on traditional links between the different countries. In 1994 Russia's exports to Belarus and Ukraine exceeded—in volume—those to the United Kingdom and Germany. The volume of exports from Belarus to Russia is almost 20% higher than the country's total exports to third countries (extra-CIS exports).

In 1994 the CIS recorded an overall trade surplus of US\$23.9 billion (US\$19.3 billion in 1993) with third countries. Russia alone had a surplus of US\$21.8 billion (US\$17.5 billion in 1993). Most other CIS countries showed deficits in 1993 and 1994.

The main trading partners of the CIS countries are the EU Member States, Hungary, Poland, China, Turkey, the United States, Switzerland and Japan. The share of foreign trade with EU Member States varies according to the CIS country: Belarus, Kyrgyzstan, Moldova, Ukraine (6–9%), Armenia, Azerbaijan, Kazakhstan, Uzbekistan (11–14%), Tajikistan (27%), and Russia (38%).

Raw materials have a high share in CIS exports to third countries (extra-CIS trade). Tajikistan, for example, trades with cotton fibre and unprocessed aluminium (98% of exports), while 80% of Uzbekistan's exports consist of cotton fibre. Kazakhstan has a more diversified raw material base: ores, crude oil, petroleum processing products, ferrous metals and refined copper (about 60% of exports), while Kyrgyzstan exports wool, cotton, and inorganic chemicals (52% of exports).

Even the more industrialized countries generate a high share of their foreign earnings through exports of non-processed or semi-processed products. Crude oil, petroleum processing products, and fertilizers make up almost one-third of the exports from Belarus and 43% (including natural gas) of those of Russia.

Machinery, equipment, and transport goods are significant import items; for Belarus, Kazakhstan, Kyrgyzstan, Russia, Turkmenistan, and Uzbekistan they represent up to one-third of total imports. Grain, all sorts of foodstuffs, consumer goods, and pharmaceuticals are other items imported on a large scale by CIS countries. In fact, the latter goods represent over half of imports for countries like Kyrgyzstan and Uzbekistan, and over 40% for Belarus and Russia.

EU

The EU is the world's largest trader. EU exports and imports amounted to ECU5 000 billion in 1993, accounting for about 20% of world trade. This share, which excludes intra-EU trade, compares with 18% for the United States and 10% for Japan. The accession of Austria, Finland, and Sweden, all three important traders, will raise this share in 1995.

In 1993, foreign trade (imports and exports) represented about 41% of total GDP of the EU, making it more dependent on the outside world than the United States (7% of GDP) and Japan (6% GDP). Dependence on foreign trade is extremely high for Belgium (95% of GDP) and the Netherlands (77% of GDP). The main ports of these two countries (Rotterdam and Antwerp) are also used by neighbouring EU Member States for their import and export operations. Among the larger EU countries, Germany's economy is the most dependent on international trade, as about 36% of its GDP is based on imports and exports (almost 60% of total trade is accounted for by intra-EU trade).

In 1993 the current 15 EU Member States recorded an overall positive trade balance of just under ECU31 billion (US\$36 billion). Germany had the biggest surplus (ECU30.8 billion or US\$35.9 billion), followed by Italy (ECU17.9 billion or US\$20.9 billion). Several countries had high deficits: the United Kingdom (–ECU24 billion or –US\$27.9 billion), Greece (–ECU12 billion or

–US\$13.7 billion), and Spain (–ECU11 billion or –US\$12.9 billion). Intra-EU trade forms the bulk of the EU's exchange of goods and services—altogether 61% of overall imports and exports in 1993. The EU therefore represents by far the most important market for companies of the Member States.

In 1993 the United States remained the EU's most important trading partner, accounting for over 7% of EU imports and exports. For several years now all EU countries (except Denmark) have recorded significant external trade deficits with Japan, which in 1993 accounted for only 2% of EU exports but over 4% of its imports. The overall EU deficit with Japan amounted to ECU27.2 billion (US\$31.9 billion). Germany and the United Kingdom recorded the highest deficits with Japan (both about ECU7 billion or over US\$8 billion), followed by France and Spain (both ECU1.7 billion or US\$2 billion).

Germany is the most important trading partner for both central European and CIS countries. The value of its exports to eastern Europe, including the CIS, stood at ECU24.5 billion (US\$28 billion), representing 44% of the EU total; its imports were slightly lower—about ECU21 billion (US\$24 billion) or 42% of the EU total. Italy and Austria ranked next for central Europe, and Italy and France for the CIS. Owing to its geographic proximity, Finland's volume of trade with the CIS is exceptionally high for its size.

12. External Trade

Main external trade indicators¹:

1993
(mn US \$)

	Exports	Imports	Balance	Exports in % of imports	Exports per capita (US \$)	Imports per capita (US \$)
Armenia	212.5	415.0	-202.5	51.2	56.7	110.7
Azerbaijan	620.2	790.6	-170.4	78.4	83.2	106.0
Belarus	2 452.4	4 306.5	-1 854.1	56.9	236.8	415.8
Georgia	...	...	...	...	...	...
Kazakhstan	3 229.4	4 498.9	-1 269.5	71.8	192.1	267.6
Kyrgyzstan	339.1	368.5	-29.4	92.0	75.8	82.4
Moldova	564.8	1 140.8	-576.0	49.5	129.8	262.2
Russia	64 179.4	36 323.3	27 856.1	176.7	432.7	244.9
Tajikistan	413.1	898.9	-485.8	46.0	71.9	156.5
Turkmenistan	1 816.0	887.4	928.6	204.6	412.2	201.4
Ukraine	9 700.4	10 532.3	-831.9	92.1	186.8	202.9
Uzbekistan	3 043.4	2 476.5	566.9	122.9	136.0	110.7
CIS 12	86 570.7	62 638.7	23 932.0	138.2	309.2	223.7
Austria	36 845.7	47 685.5	-10 839.8	77.3	4 613.8	5 971.1
Belgium ²	121 576.3	108 978.2	12 598.1	111.6	12 055.8	10 806.5
Denmark	35 525.1	29 365.7	6 159.4	121.0	6 846.8	5 659.7
Finland	23 438.3	18 024.8	5 413.5	130.0	4 625.9	3 557.4
France	221 497.6	216 238.9	5 258.7	102.4	3 841.8	3 750.6
Germany	365 395.2	329 497.8	35 897.4	110.9	4 501.1	4 058.9
Greece	8 430.2	22 173.4	-13 743.2	38.0	813.1	2 138.6
Ireland	28 983.2	21 091.7	7 891.5	137.4	8 133.8	5 919.1
Italy	168 490.4	147 572.0	20 918.5	114.2	2 953.0	2 586.4
Luxembourg ²	—	—	—	—	—	—
Netherlands	124 451.4	112 116.2	12 335.1	111.0	8 139.2	7 332.5
Portugal	15 237.8	24 072.5	-8 834.6	63.3	1 542.9	2 437.5
Spain	64 600.6	77 523.4	-12 922.8	83.3	1 652.9	1 983.6
Sweden	46 300.2	42 340.4	3 959.8	109.4	5 310.5	4 856.3
United Kingdom	181 378.0	209 317.3	-27 939.3	86.7	3 116.9	3 597.1
EUR 15	1 442 150.0	1 405 997.8	36 152.2	102.6	3 900.8	3 803.0

1. For CIS 12: 1994 data, which include for the first time intra- and extra- CIS trade (excluding Georgia, for which data were not available).

2. BLEU.

12. External Trade

Trade balance by main regions¹:1993
(mn US \$)

	Total	of which					CIS12	Rest of world
		EUR 15	USA	Japan	Central and Eastern Europe ³			
Armenia	-202.5	-1.7	-95.7	—	-2.1	-72.2	-30.8	
Azerbaijan	-170.4	13.5	-10.0	-0.1	-8.9	-240.9	76.0	
Belarus	-1 854.1	13.2	3.2	-4.2	163.2	-2 293.9	264.4	
Georgia	...	...	...	...	...	...	...
Kazakhstan	-1 269.5	-90.5	-34.2	-26.1	87.6	-1 242.0	35.7	
Kyrgyzstan	-29.4	24.2	-34.4	-2.7	-0.3	-39.0	22.8	
Moldova	-576.0	-28.4	-17.4	-0.1	35.0	-552.6	-12.5	
Russia	27 856.1	7 094.5	1 335.7	1 376.4	3 484.7	6 080.8	8 484.0	
Tajikistan	-485.8	102.9	-18.5	10.7	5.3	-488.2	-98.0	
Turkmenistan	928.6	48.4	-11.6	-14.5	-16.9	848.2	75.0	
Ukraine	-831.9	-100.3	151.5	-1.4	276.3	-2 736.5	1 578.5	
Uzbekistan	566.9	100.4	-73.1	-18.5	-58.0	736.3	-120.2	
CIS 12	23 932.0	7 176.2	1 195.5	1 319.5	3 965.9	—	10 274.9	
Austria	-10 839.8	-9 388.4	-946.7	-1 587.1	1 315.7	402.9	-636.2	
Belgium ²	12 598.1	12 836.3	-448.0	-1 915.9	641.7	-728.4	2 212.4	
Denmark	6 159.4	3 248.2	563.8	495.0	176.6	-7.0	1 682.8	
Finland	5 413.5	3 401.4	532.0	-659.4	527.2	-323.0	1 935.3	
France	5 258.7	-6 569.9	-692.6	-2 022.9	811.1	-981.4	14 714.4	
Germany	35 897.4	18 687.2	7 392.9	-8 283.5	2 493.3	1 780.6	13 826.9	
Greece	-13 743.2	-9 066.9	-444.3	-1 424.7	309.5	-317.3	-2 799.5	
Ireland	7 891.5	7 067.3	-595.6	-57.1	22.6	57.7	1 396.6	
Italy	20 918.4	8 282.4	5 169.6	-602.6	2 068.5	-2 447.2	8 447.7	
Luxembourg ²	—	—	—	—	—	—	—	
Netherlands	12 335.1	26 140.7	-4 738.2	-4 050.5	598.8	179.3	-5 795.0	
Portugal	-8 834.6	-5 760.5	-91.8	-661.4	-35.8	-136.2	-2 148.9	
Spain	-12 922.8	-8 856.2	-1 964.9	-2 011.4	215.6	-599.6	293.7	
Sweden	3 959.8	1 052.0	114.9	-978.7	198.0	-59.4	3 633.0	
United Kingdom	-27 939.3	-8 513.5	-2 529.6	-8 111.2	331.6	-196.3	-8 920.3	
EUR 15	36 152.2	32 560.0	1 321.4	-31 871.6	9 674.2	-3 375.3	27 843.5	

1. For CIS 12: 1994 data, which include for the first time intra- and extra- CIS trade (excluding Georgia, for which data were not available).

2. BLEU.

3. Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Slovakia, Slovenia, Yugoslavia.

12. External Trade

Export by main world regions¹:

1993
(mn US \$)

	Total	of which					
		EUR 15	USA	Japan	Central and Eastern Europe ³	CIS 12	Rest of world
Armenia	212.5	35.2	0.4	—	0.8	155.1	21.0
Azerbaijan	620.2	83.4	0.0	0.1	12.4	257.6	266.7
Belarus	2 452.4	311.3	54.5	3.8	281.6	1 476.8	324.4
Georgia	...	...	...	...	...	...	...
Kazakhstan	3 229.4	497.1	75.1	27.1	244.4	1 872.5	513.2
Kyrgyzstan	339.1	41.4	0.6	0.0	3.2	222.0	71.9
Moldova	564.8	39.1	1.8	—	109.6	404.9	9.4
Russia	64 179.4	22 437.9	3 405.1	2 489.9	7 454.1	14 067.7	14 324.7
Tajikistan	413.1	228.0	18.0	10.7	17.0	93.0	46.4
Turkmenistan	1 816.0	142.6*	14.6*	0.8*	55.3*	1 400.2	202.5*
Ukraine	9 700.4	892.3	336.5	26.2	794.2	5 236.0	2 415.2
Uzbekistan	3 043.4	426.6	19.9	5.1	58.4	2 077.1	456.3
CIS 12¹	86 570.7	25 134.9*	3 926.5*	2 563.7*	9 031.0	27 262.9	18 651.7*
Austria	36 845.7	24 081.1	1 189.6	542.7	4 236.0	633.9	6 162.4
Belgium ²	121 576.3	92 180.3	5 664.7	1 355.9	1 548.6	713.8	20 113.0
Denmark	35 525.1	23 124.5	1 898.1	1 414.3	956.3	351.8	7 780.1
Finland	23 438.3	13 837.9	1 844.6	382.5	1 095.8	1 133.3	5 144.2
France	221 497.6	137 612.4	15 563.2	4 097.8	3 414.8	1 883.9	58 925.5
Germany	365 395.2	206 804.7	28 282.8	9 546.1	19 653.7	9 047.0	92 060.9
Greece	8 430.2	4 961.6	376.5	75.3	845.3	225.3	1 946.2
Ireland	28 983.2	20 804.1	2 575.9	1 061.4	126.3	98.2	4 317.3
Italy	168 490.4	95 958.7	13 026.6	3 204.8	6 714.2	2 260.3	47 325.8
Luxembourg ²	—	—	—	—	—	—	—
Netherlands	124 451.4	93 174.6	5 487.3	1 299.9	2 597.1	1 363.7	20 528.8
Portugal	15 237.8	12 140.6	676.3	121.5	36.8	74.6	2 188.0
Spain	64 600.6	41 567.7	2 911.8	491.3	675.1	330.3	18 624.4
Sweden	46 300.2	27 598.2	3 968.2	1 153.7	1 112.7	353.8	12 113.6
United Kingdom	181 378.1	96 540.2	23 176.4	3 973.5	2 354.7	1 049.9	54 283.4
EUR 15	1 442 150.0	890 386.6	106 642.1	28 720.8	45 367.4	19 519.7	351 513.4

1. For CIS 12: 1994 data, which include for the first time intra- and extra- CIS trade (excluding Georgia, for which data were not available).

2. BLEU.

3. Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Slovakia, Slovenia, Yugoslavia.

12. External Trade

1993
(%)**Exports by main world regions¹:**

	Total	of which					Rest of world
		EUR 15	USA	Japan	Central and Eastern Europe ³	CIS 12	
Armenia	100	16.5	0.2	—	0.4	73.0	9.9
Azerbaijan	100	13.5	0.0	0.0	2.0	41.5	43.0
Belarus	100	12.7	2.2	0.2	11.5	60.2	13.2
Georgia	...	...	...	...	...	...	...
Kazakhstan	100	15.4	2.3	0.8	7.6	58.0	15.9
Kyrgyzstan	100	12.2	0.2	0.0	0.9	65.5	21.2
Moldova	100	6.9	0.3	—	19.4	71.7	1.7
Russia	100	35.0	5.3	3.9	11.6	21.9	22.3
Tajikistan	100	55.2	4.4	2.6	4.1	22.5	11.2
Turkmenistan	100	7.9*	0.8*	0.0*	3.0*	77.1*	11.2*
Ukraine	100	9.2	3.4	0.3	8.2	54.0	24.9
Uzbekistan	100	14.0	0.7	0.2	1.9	68.2	15.0
CIS 12	100	29.0*	4.5*	3.0*	10.4*	31.5*	21.6*
Austria	100	65.4	3.2	1.5	11.5	1.7	16.7
Belgium ²	100	75.8	4.7	1.1	1.3	0.6	16.5
Denmark	100	65.1	5.3	4.0	2.7	1.0	21.9
Finland	100	59.0	7.9	1.6	4.7	4.8	22.0
France	100	62.1	7.0	1.9	1.5	0.9	26.6
Germany	100	56.6	7.7	2.6	5.4	2.5	25.2
Greece	100	58.8	4.5	0.9	10.0	2.7	23.1
Ireland	100	71.8	8.9	3.7	0.4	0.3	14.9
Italy	100	57.0	7.7	1.9	4.0	1.3	28.1
Luxembourg ²	—	—	—	—	—	—	—
Netherlands	100	74.9	4.4	1.0	2.1	1.1	16.5
Portugal	100	79.7	4.4	0.8	0.2	0.5	14.4
Spain	100	64.4	4.5	0.8	1.0	0.5	28.8
Sweden	100	59.6	8.6	2.5	2.4	0.7	26.2
United Kingdom	100	53.2	12.8	2.2	1.3	0.6	29.9
EUR 15	100	61.7	7.4	2.0	3.1	1.4	24.4

1. For CIS 12: 1994 data, which include for the first time intra- and extra- CIS trade (excluding Georgia, for which data were not available).

2. BLEU.

3. Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Slovakia, Slovenia, Yugoslavia.

12. External Trade

Imports by main world regions¹:

1993
(mn US \$)

	Total	of which					CIS 12	Rest of world
		EUR 15	USA	Japan	Central and Eastern Europe ³			
Armenia	415.0	36.9	96.1	—	2.9	227.3	51.8	
Azerbaijan	790.6	69.9	10.0	0.2	21.3	498.5	190.7	
Belarus	4 306.5	298.1	51.3	8.0	118.4	3 770.7	60.0	
Georgia	...	...	...	...	...	...	...
Kazakhstan	4 498.9	587.6	109.3	53.2	156.8	3 114.5	477.5	
Kyrgyzstan	368.5	17.2	35.0	2.7	3.5	261.0	49.1	
Moldova	1 140.8	67.5	19.2	0.1	74.6	957.5	21.9	
Russia	36 323.3	15 343.4	2 069.4	1 113.5	3 969.4	7 986.9	5 840.7	
Tajikistan	898.9	125.1	36.5	—	11.7	581.2	144.4	
Turkmenistan	887.4	94.2*	26.2*	15.3*	72.2*	552.0	127.5*	
Ukraine	10 532.3	992.6	185.0	27.6	517.9	7 972.5	836.7	
Uzbekistan	2 476.5	326.2	93.0	23.6	116.4	1 340.8	576.5	
CIS 12	62 638.7	17 958.7*	2 731.0*	1 244.2*	5 065.1*	27 262.9	8 376.8*	
Austria	47 685.5	33 469.5	2 136.3	2 129.8	2 920.3	231.0	6 798.6	
Belgium ²	108 978.2	79 344.0	6 112.7	3 271.7	906.9	1 442.2	17 900.7	
Denmark	29 365.7	19 876.4	1 334.3	919.4	779.8	358.8	6 097.0	
Finland	18 024.8	10 436.5	1 312.6	1 041.9	568.6	1 456.4	3 208.8	
France	216 238.9	144 182.3	16 255.9	6 120.7	2 603.7	2 865.3	44 211.0	
Germany	329 497.8	188 117.5	20 889.9	17 829.6	17 160.4	7 266.3	78 234.1	
Greece	22 173.5	14 028.5	820.8	1 500.0	535.9	542.6	4 745.7	
Ireland	21 091.7	13 736.8	3 171.5	1 118.5	103.7	40.4	2 920.8	
Italy	147 572.0	87 676.2	7 857.0	3 807.5	4 645.7	4 707.5	38 878.1	
Luxembourg ²	—	—	—	—	—	—	—	
Netherlands	112 116.2	67 033.8	10 225.5	5 350.4	1 998.4	1 184.4	26 323.7	
Portugal	24 072.5	17 901.1	768.1	783.0	72.6	210.8	4 336.9	
Spain	77 523.4	50 424.0	4 876.8	2 502.7	459.6	929.8	18 330.5	
Sweden	42 340.4	26 546.3	3 853.3	2 132.4	914.6	413.2	8 480.6	
United Kingdom	209 317.3	105 053.8	25 706.0	12 084.7	2 023.1	1 246.2	63 205.5	
EUR 15	1 405 997.8	857 826.7	105 320.7	60 592.4	35 693.1	22 895.0	323 669.9	

1. For CIS 12: 1994 data, which include for the first time intra- and extra- CIS trade (excluding Georgia, for which data were not available).

2. BLEU.

3. Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Slovakia, Slovenia, Yugoslavia.

12. External Trade

Imports by main world regions¹:1993
(%)

	Total	of which					Rest of world
		EUR 15	USA	Japan	Central and Eastern Europe ³	CIS 12	
Armenia	100	8.9	23.1	—	0.7	54.8	12.5
Azerbaijan	100	8.8	1.3	0.0	2.7	63.1	24.1
Belarus	100	6.9	1.2	0.2	2.7	87.6	1.4
Georgia	...	...	...	...	...	...	...
Kazakhstan	100	13.1	2.4	1.2	3.5	69.2	10.6
Kyrgyzstan	100	4.7	9.5	0.7	1.0	70.8	13.3
Moldova	100	5.9	1.7	0.0	6.6	83.9	1.9
Russia	100	42.2	5.7	3.1	10.9	22.0	16.7
Tajikistan	100	13.9	4.1	—	1.3	64.7	16.0
Turkmenistan	100	10.6*	3.0*	1.7*	8.1*	62.2	14.4*
Ukraine	100	9.4	1.8	0.3	4.9	75.7	7.9
Uzbekistan	100	13.2	3.8	1.0	4.7	54.1	23.2
CIS 12¹	100	28.7*	4.3*	2.0*	8.1*	43.5	13.4*
Austria	100	70.1	4.5	4.5	6.1	0.5	14.3
Belgium ²	100	72.9	5.6	3.0	0.8	1.3	16.4
Denmark	100	67.7	4.5	3.1	2.7	1.2	20.8
Finland	100	57.8	7.3	5.8	3.2	8.1	17.8
France	100	66.8	7.5	2.8	1.2	1.3	20.4
Germany	100	57.2	6.3	5.4	5.2	2.2	23.7
Greece	100	63.3	3.7	6.8	2.4	2.4	21.4
Ireland	100	65.2	15.0	5.3	0.5	0.2	13.8
Italy	100	59.5	5.3	2.6	3.1	3.2	26.3
Luxembourg ²	—	—	—	—	—	—	—
Netherlands	100	59.7	9.1	4.8	1.8	1.1	23.5
Portugal	100	74.3	3.2	3.3	0.3	0.9	18.0
Spain	100	65.1	6.3	3.2	0.6	1.2	23.6
Sweden	100	62.7	9.1	5.0	2.2	1.0	20
United Kingdom	100	50.2	12.3	5.8	1.0	0.6	30.2
EUR 15	100	61.1	7.5	4.3	2.5	1.6	23.0

1. For CIS 12: 1994 date, which include for the first time intra- and extra- CIS trade (excluding for Georgia, for which data were not available).

2. BLEU.

3. Albania, Bosnia-Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Romania, Slovakia, Slovenia, Yugoslavia F.R.

Public Health

Key Facts (1993)	CIS 12	EUR 15
Health infrastructure		
Doctors (1 000)	1 058.0 ¹	1191.4*
Dentists (1 000)	131.3 ¹	181.0*
Hospital beds (mn)	3.5	2.6*
Health services		
Doctors (per 100 000 inhabitants)	380.0	322
Dentists (per 100 000 inhabitants)	47.0	49.0
Hospital beds (per 1000 inhabitants)	12.4	7.0
Causes of death (per 100 000 inhabitants)		
Deaths from all causes	1 263	1 017
Malignant neoplasms	170*	250
Cardiovascular diseases	657*	440
Respiratory diseases	...	56
Accidents and disasters	115*	50
Infant mortality ²	25.0	6.7

1. Excluding Georgia.

2. Deaths of infants under 1 year per 1 000 live births.

CIS

In 1993 about 7 million people (5% of civilian employment) were employed in the health sector. The number of doctors and dentists has remained at 1.2 million since 1990.

The number of people served by a doctor ranged from 186 in Georgia to about 470 in Tajikistan. Compared with 1990 the burden on doctors, measured by this ratio, increased by 4–17% and on medical staff by 3–12%.

During 1990–1993 the decline in the number of hospital beds per 1 000 inhabitants varied between 5–8% in Belarus, Kyrgyzstan, Moldova, and Russia, and 24% in Uzbekistan. In many countries, the decrease in the number of beds is not compensated by the establishment of new healthcare facilities and their restructuring.

The number of cases of certain illnesses has been rising. In Belarus, Russia, and Ukraine, ageing of the population and unhealthy environmental conditions have led to a surge in the cases of malignant neoplasms. During 1990–1993, Belarus, Russia, and Ukraine recorded a 20–25% increase in the number of first-diagnosis tuberculosis patients (10% for Moldova).

At the beginning of 1995, 156 cases of AIDS were reported among the 863 HIV-positive patients in Russia, where about 110 AIDS patients have died since 1987. Drug addiction is also spreading in the CIS. During 1993 the

number of drug addicts (first-time diagnosis cases) increased by 23–34% in Uzbekistan, Azerbaijan and Turkmenistan, and by 160–180% in Belarus, Kyrgyzstan, Moldova, Russia, and Ukraine.

In most CIS countries, infant mortality is increasing again after a fall during the 1980s. The rates are still very high in Central Asia and Azerbaijan (28–47 deaths per 1000). The lowest infant mortality rates in 1993 were reported from Belarus and Ukraine (12–15 deaths per 1 000).

Lower births and higher deaths in the early 1990s had a negative impact on life expectancy, particularly for the male population. In Russia, the average male dies before the age of 60. In the other CIS countries, the average life expectancy for men lies between 62 and 66 years. Women generally tend to live longer (72–75 years).

Certain countries are considering the creation of a system of compulsory medical insurance to improve management and financing of healthcare. Special funds have been created in Russia at federal and regional levels to support this system. Their main source of revenue will be fees (3.6% of total labour costs) paid by enterprises and organizations. It is still too early to evaluate the impact of the compulsory insurance scheme on public health or the quality of services provided by healthcare institutions.

EU

In 1993, there were approximately 1.2 million doctors and 200 000 dentists in the EU (EUR 15). Total medical staff working in the health sector was 7 million, representing almost 5% of EU employment (same share as in the CIS). An increase of these figures has been observed in practically all EU Member States since the 1970s.

Each country has its specific health infrastructure, which can be measured by the number of doctors, dentists, and hospital beds. There are apparently more doctors (per 100 000 inhabitants) in certain Mediterranean countries like Greece and Spain (400–500 doctors) than in northern Europe (160–370). In general, the Scandinavian Member States had the highest number of dentists (per 100 000 inhabitants) in 1993: Denmark (89), Finland (91), Sweden (101 in 1990). Finland, Luxembourg, and the Netherlands had the highest number of hospital beds (more than 10 per 1000 inhabitants).

The most common causes of death for both males and females are circulatory disorders and malignant tumors (neoplasms). In 1993 the number of deaths (per 100 000 inhabitants) from these two diseases averaged 440 and 250, respectively, across the EU. These rates were much higher than those recorded for other causes

of death (e.g. diseases of the respiratory system, accidents and disasters).

Between 1970 and 1992, the proportion of deaths caused by circulatory diseases remained relatively stable at about 40% for males and 48% for females. The share of deaths by cancer rose for both sexes: from 20% to 27% for males and from 18% to 21% for females.

Causes of death differ according to the age group. Two-thirds of deaths among males aged between 15 and 24 years were due to accidents and suicides. Cancer is chiefly responsible for the death among women aged 45 years and over. Heart failure mainly affects senior citizens aged 65 years or more, while AIDS is prevalent mainly among young adults. In 1992, more than 12 000 AIDS-related deaths were diagnosed in the EU.

Infant mortality rates do not differ substantially between the Member States. In 1993 the lowest rates (per 1000 infants under 1 year) were recorded in the Scandinavian countries (4.4–5.4). The average rate for the EU (6.7 per 1000 infants) is more than 3 times lower than that of the CIS. The average life expectancy of European male is around 73 years, about 7 years less than for the average female.

13. Public Health

1993
(at the end of the year)

	Doctors		Dentists ⁴		Hospital beds	
	Total	per 100 000 population	Total	per 100 000 population	Total (1 000)	per 1 000 population
Armenia	12 507	334	1 293	35	30.6	8.2
Azerbaijan	26 366	358	2 482	34	76.9	10.4
Belarus	38 536	373	5 358	52	128.7	12.5
Georgia	29 117 ¹	537	2 952 ¹	55	57.1	10.5
Kazakhstan	61 089	362	5 807	35	225.4	13.4
Kyrgyzstan	13 350	301	1 432	33	48.9	11.0
Moldova	15 459	355	1 897	44	54.3	12.5
Russia	591 129	400	77 378	52	1 914.7	12.9
Tajikistan	12 127	213	1 123	20	59.5	10.5
Turkmenistan	13 140	328	951	24	46.1	11.5
Ukraine	203 372	392	26 783	52	678.7	13.1
Uzbekistan	70 918	321	6 792	31	208.1	9.4
CIS 12	1 057 993⁵	380	131 296⁵	47	3 529.0	12.4
Austria	26 121	328	3 517	44	75.6	9.5
Belgium	36 821	366	6 971	69	59.8	5.9
Denmark	14 657 ²	284	4 597	89	26.8 ²	5.7
Finland	13 300	263	4 600	91	50.9	10.1
France	161 421	281	39 421	69	533.1	9.2
Germany	259 981	321	56 342	70	628.7	7.8
Greece	40 116	388	10 739	104	51.4	5.0
Ireland	5 961	167	1 433	40	21.9 ¹	6.3
Italy	289 597 ³	510	...	...	389.0 ²	6.9
Luxembourg	845	215	203	51	4.6	11.5
Netherlands	37 461 ¹	252	7 900 ¹	53	172.4	11.3
Portugal	28 769	292	2 064	21	41.0	4.2
Spain	156 100 ²	401	11 808 ²	30	162.5 ²	4.2
Sweden	24 850 ¹	290	8 629 ¹	101	53.0	...
United Kingdom	95 395	164	22 789	39	307.9 ²	5.3
EUR 15 *	1 191 395	322	181 013	49	2 578.6	7.0

1. 1990.

2. 1992.

3. 1991.

4. For CIS 12: including dentists with secondary specialized education.

5. Excluding Georgia.

13. Public Health

Causes of deaths¹:

1993
(per 100 000 inhabitants)

	All causes	Malignant neoplasms (140-208)	Diseases of the circulatory system (390-459)	Diseases of respiratory system (480-486, 490-493)	Accidents, injuries, poisoning (E800-949, E950-959)
Armenia	736.9	93.8	369.7	40.4	49.2
Azerbaijan	732.6	68.2	347.1	76.1	38.9
Belarus	1 241.2	181.5	614.5	55.5	109.9
Georgia	960.3 ³	97.3 ³	676.3 ³	30.2 ²	63.5 ^{3,4}
Kazakhstan	921.5	135.5	426.0	64.0	104.6
Kyrgyzstan	770.0	67.6	291.1	89.1	72.6
Moldova	1 072.0	133.1	434.5	56.2	85.7
Russia	1 446.4	204.6	768.9	55.8	167.3
Tajikistan	874.9	40.7	222.8	87.1	127.1
Turkmenistan	789.7	62.3	333.8	78.0	54.5
Ukraine	1 421.4	198.9	782.6	68.8	131.2 ⁴
Uzbekistan	662.0	48.2	300.3	60.4	42.3
CIS 12*	1 263	170	657	...	115
Austria	1 032.6	244.4	544.7	37.9	61.1
Belgium	1 072.6	270.1 ²	398.9 ²	45.2 ²	60.8 ²
Denmark	1 210.5	276.1	513.9	87.4	69.2
Finland	1 006.4	204.3	485.2	75.8	78.4
France	922.6	247.4	301.8	43.3	75.5
Germany	1 105.3	263.3	543.1	47.1	48.6
Greece	938.6	202.3	460.2	9.6	39.8
Ireland	888.4	212.8	402.6	66.0	38.6
Italy	972.9*	261.5	417.1	42.9	48.0
Luxembourg	983.5	254.5	416.5	38.9	65.3
Netherlands	901.2	238.4	355.2	54.0	32.4
Portugal	1 077.2	195.1	467.5	44.6	67.1
Spain	866.5*	206.3 ³	340.1 ³	26.1 ³	42.5 ³
Sweden	1 112.7	235.8	554.8	71.4	45.1
United Kingdom	1 130.5*	274.3	507.3	118.7	28.4
EUR 15*	1 016.8	249.4	440.1	55.5	49.5

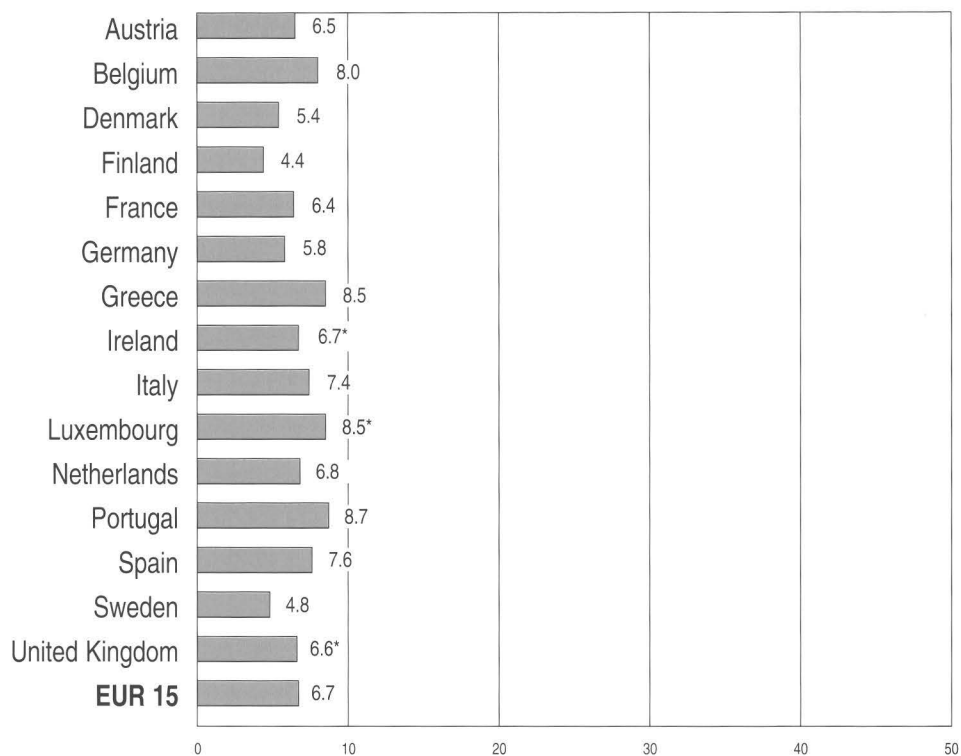
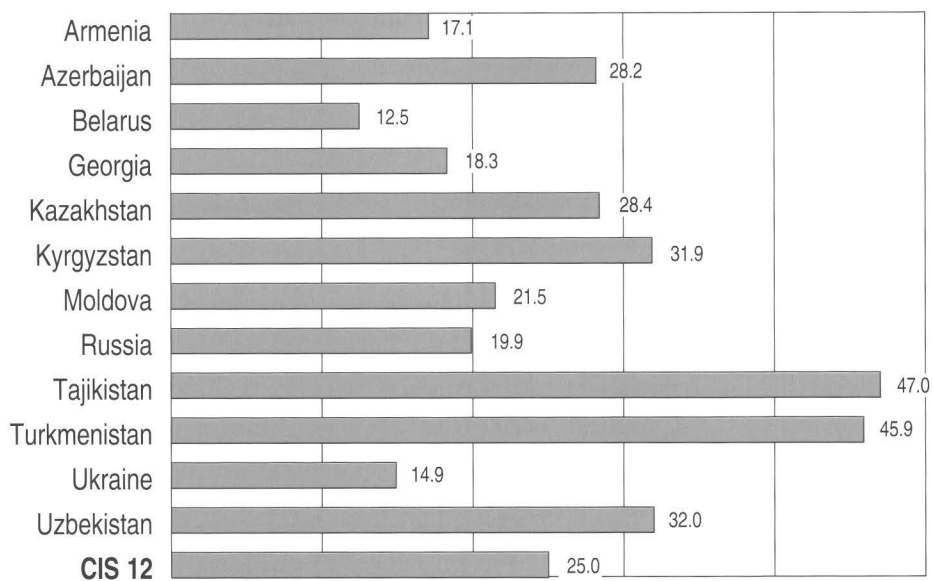
1. According to the International Classification of Diseases of the World Health Organization.

2. 1990.

3. 1992.

4. Including murders.

Infant Mortality¹:

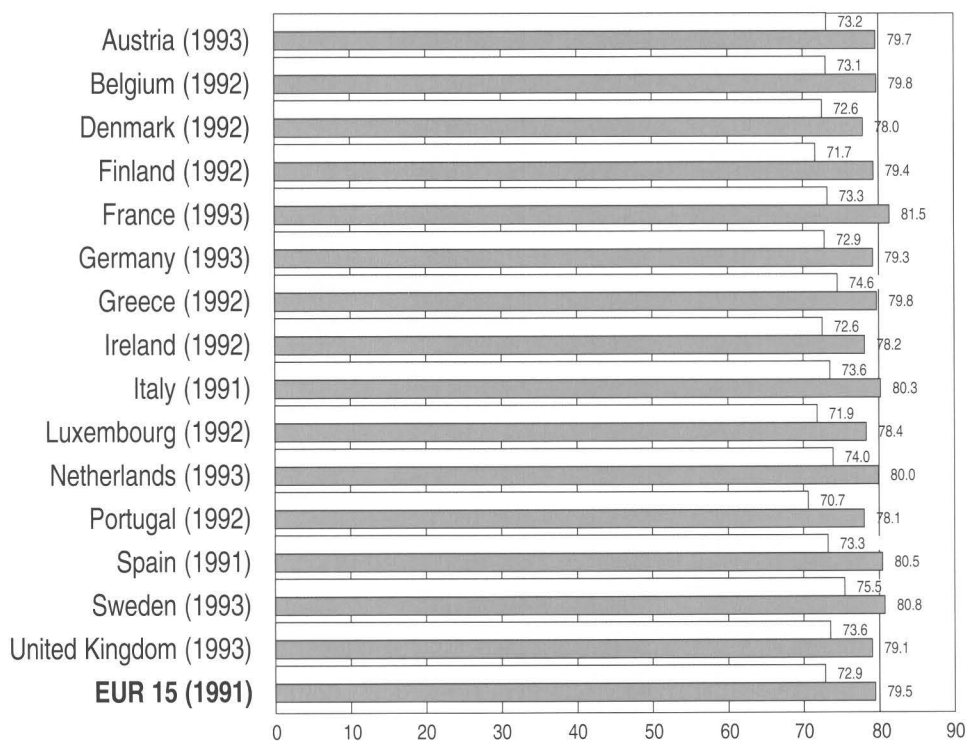


1. Deaths of infants under 1 year per 1 000 births.

13. Public Health

1990-1993

Life Expectancy at Birth:



1. 1992-1993 average.

Education

Key Facts (1993)	CIS 12	EUR 15
Number of pupils and students (mn)		
Primary education	17.0	23.7
Secondary education	32.5	36.2
Higher education	4.5	10.1
Per 1 000 inhabitants		
Primary education	60	64
Secondary education	114	98
Higher education	16	27

CIS

The CIS average number of pupils in primary and secondary schools (excluding specialized schools) showed little variation during 1990–1993 (43.6 million in 1993). Elementary schools (classes 1–4) recorded an increase only in Belarus (+2.3%), Azerbaijan and the Central Asian countries except Kyrgyzstan (3–8%). Secondary schools (classes 5–11 or 12), recorded an increase in Belarus, Kyrgyzstan, Russia, and Turkmenistan. The decline in other countries can be attributed to demographic factors (fewer young people) and to armed conflicts in certain areas. Specialized secondary education is becoming less popular; the number of pupils in such establishments decreased by 12% to 3.5 million during 1990–1993.

The number of higher education institutions has risen as there is an increased need to prepare specialists for economic and technological transition. During 1991–1994, 72 such establishments were opened in Ukraine. A similar trend was observed in other countries: Russia (34 new openings), Belarus (22), Kyrgyzstan (11), Tajikistan (9), Kazakhstan (8), Moldova (7), Azerbaijan (5), and Uzbekistan (3). But during 1991–1993 this expansion in the number of establishments was not accompanied by an equal

increase in the number of students including new enrolments. The number of students in higher education declined during this period in the CIS; for example, –32% in Armenia, –20% in Uzbekistan, and –10% in Azerbaijan. The trend improved in 1994, when the number of enrolments started to increase in most countries of the CIS.

The growing need for specialists in economics and law is reflected in the increased share of these two disciplines in new enrolments, especially in Belarus (from 8% in 1991 to 23% in 1994), Azerbaijan (from 10% to 15%), and Tajikistan (from 2% to 10%). There had been no enrolments for these subjects in Kyrgyzstan and Moldova in 1991, but their shares in the 1994 enrolments were already 9% and 18%, respectively. An increasing number of specialists are studying to receive their second higher education in economics or law.

During 1991–1994 many private establishments were created for all levels of education. In 1994, Russia had 447 private schools and about 200 higher education institutions. It was followed by Ukraine (52, 42), Kazakhstan (18, 32), Belarus (2, 16), Moldova (4 higher education establishments), Kyrgyzstan (3 higher education establishments), and Armenia (3 private schools).

EU

There are about 113 million young people under 25 years of age in the EU (one-third of the EU population). Their education and intellectual preparation for the challenges lying ahead (e.g. new technologies, environmental issues, international competition) will be a key factor in determining the EU's future role on the international scene. EU governments are gearing national education policies to meet the needs of an increasingly integrated market based on free movement of people, intercultural communication, and the dominance of information technology.

Additionally, education policies have to be coordinated at EU level (Art. 126–127, Union Treaty). The aim is to promote cooperation between Member States, while fully respecting cultural and linguistic diversity by acknowledging the responsibility of each Member State for the content and organization of its education system.

These efforts aim to promote the European dimension, particularly through the teaching of languages and intercultural skills. Mobility of students and teachers is encouraged through exchange programmes at all levels of education; emphasis is also placed on distance education. To support these efforts, several EU directives focus on recognition of standard diplomas starting from end of secondary school education to higher university studies.

National educational systems differ significantly. Compulsory education starts at the age of 6 years in most Member States; at 5 years in Greece, the Netherlands and the United Kingdom; and at 4 years in Luxembourg. In most countries, school-leaving age is 18 years, except in Denmark,

Germany, Italy, and Luxembourg, where it is usually later, at 19–20 years. The duration of post-graduate studies can also vary from 2–3 years to up to 7 years; certain countries can grant two or even three diplomas before a doctorate degree, others only one.

Some 70 million pupils and students — 19% of the total population — were enrolled in 1993 (EUR 15). Of this total, about 52% were in secondary schools, 34% in primary schools, and almost 15% in higher education establishments, including universities and technical colleges. The proportion of students in higher education varies from 9% in Portugal to 16% in Denmark, Germany, and Italy. In Luxembourg, only 2% of all pupils and students pursued graduate studies in 1993. The reason for this low rate is that the existing university offers only a syllabus of 1–2 preparatory years, after which students have to continue their studies abroad.

As a result of declining birth rates since the early 1970s, the number of pupils in primary schools has also diminished. Secondary schools and universities, however, recorded an appreciable increase in enrolment. In 1993, an average of almost 40% of young adults aged 19–21 years attended schools or universities in the EU. Female participation has increased at all levels of education. In 1993/92 more women than men pursued graduate studies in seven of the current Member States: Portugal (151 women/100 men), Sweden (117/100), France (116/100), Finland (113/100), Denmark (111/100), Spain (105/100), and Greece (103/100). The rates were lowest in Germany (71/100) and the Netherlands (83/100).

14. Education

1993

Number of pupils and students:

	Primary education ²		Secondary general and specialized education ³		Higher education ⁴	
	Total (1 000)	per 1 000 population	Total (1 000)	per 1 000 population	Total (1 000)	per 1 000 population
Armenia	213.5	78	422.6	113	46.5	12
Azerbaijan	582.0	78	875.0	117	94.4	13
Belarus	634.6	61	1 159.1	112	175.4	17
Georgia	300.9	55	456.3	84	91.1	17
Kazakhstan	1 257.9	74	2 230.3	132	272.1	16
Kyrgyzstan	342.2	76	677.0	151	52.3	12
Moldova	307.8	71	464.6	107	46.9	11
Russia	7 738.0	52	16 561.9	112	2 542.9	17
Tajikistan	570.9	102	694.2	124	69.0	12
Turkmenistan	325.6	75	614.3	141	38.9	9
Ukraine	2 897.8	56	4921	94	829.2	16
Uzbekistan	1 860.7	84	3 394.2	153	272.3	12
CIS 12	17 031.9	60	32 470.5	114	4 531.0	16
Austria	379	47	757	94	217	27
Belgium	712	70	990	98	286	28
Denmark	327	63	456	87	150	29
Finland	393	76	447	88	174	34
France	4 110	71	5 755	100	1840	32
Germany	3 438	42	7 522	92	2034	25
Greece	791	76	865	83	200	19
Ireland	409	115	371	104	101	28
Italy	3 004	53	5 010	89	1533	27
Luxembourg	25	63	23	58	1	3
Netherlands	1 408	92	1 526	100	494	32
Portugal	941*	95	892*	90	191*	19
Spain	2 662	68	4 773	122	1 302	33
Sweden	584	67	590	68	207	24
United Kingdom	4 560	78	6 237	107	1385	24
EUR 15	23 743	64	36 214	98	10 115	27

1. According to ISCED classification of UNESCO.

2. ISCED 1.

3. ISCED 2 and 3.

4. ISCED 5, 6 and 7.

14. Education

1993

Number of students by field of study^{1,2:}

of which (%)

	Total (1 000)	Agriculture	Industry/ Construction	Transport/ Communication	Economy/ Law	Education	Health	Art/ Cinema
Armenia	46.5	7	32	—	9	39	10	3
Azerbaijan	94.4	8	31	0.0	11	37	10	3
Belarus	175.4	10	27	3	8	42	9	1
Georgia	91.1	...	...	...	...	...	...	...
Kazakhstan	272.1	13	26	3	5	42	10	1
Kyrgyzstan	53.1	9	24	—	1	54	11	1
Moldova	46.9	12	19	—	12	38	15	4
Russia	2 542.9	9	36	6	7	33	8	1
Tajikistan	69.0	9	11	—	5	62	11	2
Turkmenistan	38.9	14	15	3	11	40	14	3
Ukraine	829.2	10	35	6	8	33	7	1
Uzbekistan	272.3	7	15	5	4	5	11	1
CIS 12	4 531.8	10	33	5	7	36	8	1

	Total (1 000)	Humanities/ Religion	Social Sciences ³	Law	Natural Sciences	Mathematics/ Computer Science	Medical Science	Engineering/ Architecture	Others ⁴
Austria*	216.5	18	29	10	6	7	8	15	7
Belgium ⁵	276.2	7	39	5	2	1	13	19	14
Denmark	150.2	19	25	4	4	4	11	17	16
Finland	173.7	14	15	2	5	7	18	23	16
France	1 840.3	...	...	...	...	...	..	...	...
Germany ⁷	1 867.5	15	24	5	7	5	11	22	11
Greece ⁵	195.2	13	21	4	4	4	13	23	18
Ireland	101.1	19	22	2	12	3	5	15	22
Italy	1 533.2	15	26	16	6	3	10	17	7
Luxembourg	—	...	...	...	...	...	...	...	...
Netherlands ⁶	458.3	12	31	6	2	1	9	18	21
Portugal	190.9	11	30	9	4	5	6	17	18
Spain	1 301.7	11	25	19	6	5	8	16	10
Sweden	207.3	17	24	5	4	6	15	19	10
United Kingdom	1 385.1	12 ⁸	27	—	7	5	12	15	22
EUR 15	9 897.2*	...	...	...	...	...	...	...	...

1. For EUR 15: 1991/1992.

2. Higher education (ISCED 5, 6 and 7).

3. Including business and communication.

4. Including agriculture and teacher education.

5. 1990/1991.

6. Excluding distance learning.

7. Territory of the Federal Republic of Germany prior to 3.10.90.

8. Including law.

Environment

Key Facts (1993)
CIS 12
EUR 15

Air pollution from stationary sources (mn t)

Sulphur dioxide (SO _x)	11.9*	15.1*
Nitrous oxide (NO _x)	3.6*	12.9*
Carbon monoxide (CO)	9.1*	43.1*
Hydrocarbon ¹ (CH)	...	13.8*

Per capita (kg)

Sulphur dioxide (SO _x)	43*	41*
Nitrous oxide (NO _x)	13*	35*
Carbon monoxide (CO)	32*	118*
Hydrocarbon ¹ (CH)	...	38*

1. For EUR 15: volatile organic carbon (VOC).

CIS

In February 1992, the Heads of State of the CIS countries agreed to establish an Interstate Environment Council to implement joint ecological policies for environmental protection. The Council's main task is to design interstate work programmes based on common methods of evaluation and pollution control. The Council will also harmonize environmental laws, norms and standards across the CIS.

The decline in industrial and agricultural production has reduced the use of natural resources and, consequently, the negative impact on the environment. In 1993 total emissions of pollutants into the atmosphere from stationary sources were estimated at 40 million t (representing slightly over 50% of total emissions), which was 12% lower than in 1992 (Azerbaijan, -7%; Kazakhstan, -9%; Belarus, Russia, Ukraine, from -12 to -16%). Emissions decreased by a further 14% to 35 million t in 1994. Thermal power plants remained the main source of pollution, although between 1990 and 1994 their emission levels decreased by one-third to 8.7 million t.

In 1994, atmospheric pollution from road transport accounted for the remaining 50% of

total emissions (over 30 million t). In countries like Azerbaijan, Belarus, Moldova, and Ukraine pollution caused by road transport has decreased over the past few years. But, in Russia, annual emissions remained at the same level of 19-20 million t in the early 1990s, as production and use of environmentally friendly lorries operating on liquefied and compressed gas declined.

Serious accidents involving oil and gas pipelines, industrial plants, and rail, sea and river transport continue to ravage the natural environment in the CIS. About 2400 such incidents were recorded in 1993.

In 1993, the CIS countries invested Rbl 848.5 billion at current prices in environmental protection and the rational use of natural resources; this was 10% lower in real terms compared with 1992. Investment in environmental protection has been reduced each year since 1990 (-2% in 1990, -8% in 1991, and -16% in 1992). In comparison, during the 1980s investments had increased by about 5-7% per annum.

EU

Atmospheric pollution in the EU is caused mainly by sulphur (SO_x) and nitrogen oxides (NO_x), carbon monoxide (CO), and volatile organic carbons (VOC). Carbon dioxide (CO₂) is not a direct pollutant, but it contributes to the greenhouse effect and global warming. While electricity-generating power plants are the main sources of sulphur and carbon dioxide emissions, fuel combustion in motor vehicles is the main source of nitrogen oxide and carbon monoxide emissions.

The EU Environment Policy is laid down in Articles 130r–t of the Union Treaty. Its main objectives are:

- to preserve, protect, and improve the quality of the environment
- to protect human health
- to encourage prudent and rational utilization of natural resources
- to promote measures at international level to deal with regional or worldwide environmental problems

The Council has already adopted several directives and regulations aimed at combating atmospheric pollution and the release of noxious substances that damage air, water, and soil quality. Important

actions have so far been taken to reduce sulphur levels in fuels, to introduce compulsory catalytic converters in motor vehicles, and to lower nitrogen emissions from industrial and power plants.

The impact of EU environmental laws is already visible as most emission levels have fallen (SO_x) or been held at the same level (NO_x). Following a German initiative, the EU has also decided to impose a complete ban on chlorofluorocarbon (CFC) production and consumption by 1997. CFCs are mainly used as coolants in air conditioning and refrigeration equipment, and as foaming agents and propellants in aerosols.

Emission levels are also linked to the degree of industrialization and to population density. In 1993, Germany and the United Kingdom recorded the highest emission rates for SO_x (3.9 million t and 3.6 million t, respectively) and NO_x (2.9 million t and 2.7 million t). These two countries also ranked high for VOC pollution, together with France and Italy.

Per capita emission levels vary with the country and the type of pollutant. They are particularly high for SO_x in Germany, Greece, Ireland, Spain, and the United Kingdom (49–62 kg); for NO_x in Finland, Denmark, and Luxembourg (55–59 kg), for CO in Austria, Denmark, and Sweden (136–195 kg).

15. Environment

1993
(1000 t)

	Sulphur oxide (SOx)	Nitrous oxide (NOx)	Carbon monoxide (CO)	Hydrocarbon (CH)
Armenia	44	10	7	...
Azerbaijan	58	32	38.0	1342
Belarus	329	79	138	112
Georgia	76	24	120	...
Kazakhstan	1 404	315	556	188
Kyrgyzstan	32	7	13	5
Moldova	110	25	18	...
Russia	7 198	2 452	5 866	3 990
Tajikistan	8	4	34	2
Turkmenistan	20	25	55	315
Ukraine	2 194	550	2 069	...
Uzbekistan	442	93	136	...
CIS 12 *	11 915	3 616	9 050	...
Austria ³	84	216	1 503	419
Belgium ²	420	300	700	13.9
Denmark ²	181	283	700	174
Finland	194 ³	286	484	225
France ³	1 314	1 507	7 338	2 286
Germany ¹	3 896	2 904	9 135	2 791
Greece	510	150	700	418
Ireland ²	187	128	454	97
Italy ⁴	1 988	1 996	6 590	2 401
Luxembourg	10 ²	22	240	20
Netherlands ³	204	550	993	447
Portugal ²	211	142	1 086	207
Spain	2 205	1 247	4 950	1 118
Sweden ³	106	388	1 500	501
United Kingdom	3 565	2 747	6 735	2 596
EUR 15 *	15 075	112 866	43 108	13 839

1. 1992.
2. 1990.
3. 1991.
4. 1989.

15. Environment

1993
(t per capita)

	Sulphur dioxide (SO _x)	Nitrous oxide (NO _x)	Carbon monoxide (CO)	Hydrocarbon (CH)
Armenia	12	3	2	...
Azerbaijan	8	4	5	181
Belarus	32	8	13	11
Georgia	14	4	22	...
Kazakhstan	83	19	33	11
Kyrgyzstan	7	2	3	1
Moldova	25	6	4	...
Russia	49	17	40	27
Tajikistan	1	1	6	0.3
Turkmenistan	5	6	14	82
Ukraine	43	11	40	...
Uzbekistan	20	4	6	...
CIS 12 *	43	13	32	...
Austria ³	11	28	192	54
Belgium ²	42	30	129	...
Denmark	35	55	...	34
Finland	39 ³	57	97	46
France ³	23	26	129	...
Germany ¹	15	41	...	40
Greece	...	15	...	...
Ireland	53	37	130	28
Italy	...	35	115	...
Luxembourg	26 ²	...	...	...
Netherlands ³	14	37	66	30
Portugal ²	21	14	...	...
Spain	...	...	...	...
Sweden ³	12	45	...	...
United Kingdom	62	48	117	45
EUR 15	...	...	...	...

1 1992.

2 1990.

3 1991.

4 1989.

Annexes

- 16.1. Russian Rouble and ECU Exchange Rates**
- 16.2. US Dollar Exchange Rates**
- 16.3. CIS Statistical Offices:
Addresses for Further Information**
- 16.4. EU Statistical Offices:
Addresses for Further Information**

16.1. Russian Rouble and ECU Exchange Rates

1993-1994

National currency unit	End of 1993	End of 1994	Average 1994
<i>(national currency per Russian rouble)</i>			
Armenia	<i>Dram</i>	0.059	0.1070
Azerbaijan	<i>Manat</i>	0.087 ¹	1.210
Belarus	<i>Belarus rouble</i>	4.51	2.92 ²
Georgia	<i>Coupon</i>	83.0	335.0
Kazakhstan	<i>Tenge</i>	0.0046	0.0162
Kyrgyzstan	<i>Som</i>	0.0064	0.0030
Moldova	<i>Lei</i>	0.0030	0.0010
Russia	<i>Russian rouble</i>	1.0	1.0
Tajikistan	<i>Russian rouble</i>	1.0	1.0
Turkmenistan	<i>Manat</i>	0.0017	0.0231
Ukraine	<i>Karbovanec</i>	10.19	31.20
Uzbekistan	<i>Sum-coupon</i>	1.0	0.0071 ³
<i>(national currency per ECU)</i>			
Austria	<i>Schilling</i>	13.61	13.41
Belgium	<i>Belgian franc</i>	40.29	39.16
Denmark	<i>Krone</i>	7.55	7.48
Finland	<i>Markka</i>	6.46	5.83
France	<i>French franc</i>	6.58	6.58
Germany	<i>Mark</i>	1.94	1.91
Greece	<i>Drachma</i>	277.97	295.48
Ireland	<i>Irish pound</i>	0.79	0.80
Italy	<i>Lira</i>	1 909.98	1 997.45
Luxembourg	<i>Belgian franc</i>	40.29	39.16
Netherlands	<i>Gulden (Florin)</i>	2.17	2.13
Portugal	<i>Escudo</i>	197.05	195.88
Spain	<i>Peseta</i>	158.93	162.07
Sweden	<i>Krona</i>	9.30	9.18
United Kingdom	<i>Pound sterling</i>	0.76	0.79
United States of America	<i>US dollar</i>	1.12	1.23
Japan	<i>Yen</i>	124.73	122.66

1. End of January 1994.

2. Following a 10-time decrease in denomination of the Belarus rouble.

3. The "sum" was introduced on 27 June, 1994 replacing the "sum-coupon". 1994 average rate takes into account the recalculated average of the previous currency (1 000 sum-coupon=1 sum).

16.2. US Dollar Exchange Rates

1993-1994
(national currency per US \$)

National currency unit	End of 1993	End of 1994	Average 1994
Armenia <i>Dram</i>	75	405.5	288.35
Azerbaijan <i>Manat</i>	...	4182	1 168.7
Belarus <i>Belarus rouble</i>	6 990	10 600 ¹	3 592 ¹
Georgia <i>Coupon</i>	102 300	1 330 000	1 099 063
Kazakhstan <i>Tenge</i>	6.31	54.26	35.9
Kyrgyzstan <i>Som</i>	8.03	10.6	10.84
Moldova <i>Lei</i>	3.64	4.27	4.07
Russia <i>Russian rouble</i>	1 247	3 550	2 204
Tajikistan <i>Russian rouble</i>	1 247	3 550	2 204
Turkmenistan <i>Manat</i>	1.99	75.0	19.50
Ukraine <i>Karbovanec</i>	12 610	107 900	31 699
Uzbekistan <i>Sum-coupon</i>	1247	25.0 ²	9.96 ²
Austria <i>Schilling</i>	12.199	10.9	11.406
Belgium <i>Belgian franc</i>	36.11	31.838	33.409
Denmark <i>Krone</i>	6.77	6.083	6.354
Finland <i>Markka</i>	5.791	4.739	5.218
France <i>French franc</i>	5.895	5.346	5.545
Germany <i>Mark</i>	1.735	1.549	1.621
Greece <i>Drachma</i>	249.15	240.22	242.396
Ireland <i>Irish pound</i>	0.709	0.646	0.668
Italy <i>Lira</i>	1711.95	1 623.89	1611.826
Luxembourg <i>Belgian franc</i>	36.11	31.838	33.409
Netherlands <i>Gulden (Florin)</i>	1.941	1.735	1.818
Portugal <i>Escudo</i>	176.62	159.25	165.852
Spain <i>Peseta</i>	142.45	131.76	133.831
Sweden <i>Krona</i>	8.333	7.462	7.713
United Kingdom <i>Pound sterling</i>	0.677	0.64	0.653

1. Following a 10-time decrease in denomination of the Belarus rouble.

2. The "sum" was introduced on 27 June, 1994 replacing the "sum-coupon". 1994 average rate takes into account the recalculated average of the previous currency (1000 sum coupon=1 sum).

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The CIS & EU — Facts and Figures 1995

Luxembourg: Office for Official Publications of the European Communities

1995 — 167 pp. — 21.0 x 29.7 cm

CIS text:

Thematic divisions of the Interstate Statistical Committee of the CIS.

EU text:

Paul Fischer, using information provided by the European Commission, particularly the thematic divisions of Eurostat.

Price (excluding VAT) in Luxembourg: ECU 30

The result of a joint cooperation effort between the *Interstate Statistical Committee of the CIS* and *Statistical Office of the European Communities — Eurostat*.

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ISBN 92-827-5542-8



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