COMMISSION OF THE EUROPEAN COMMUNITIES

COMMUNITY SUPPORT FRAMEWORK 1991-93

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

PORTUGAL

DOCUMENT

COMMISSION OF THE EUROPEAN COMMUNITIES

COMMUNITY SUPPORT FRAMEWORK 1991-93

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

PORTUGAL

DOCUMENT

This document has been prepared for use within the Commission. It does not necessarily represent the Commission's official position.

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

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

ISBN 92-826-3975-4

Printed in Germany

Table of contents

Preliminary note

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

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

Introduction by Mr Marín,

Vice-President of the Commission and Member responsible for fisheries

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

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

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

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

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

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

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

The Community's assistance is therefore geared toward:

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

(ii) guaranteeing a constant flow of inputs of raw materials;

(iii) contributing to the application of Community hygiene and public health standards and greater attention to the quality of the environment.

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

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

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

(i) more precise knowledge of the objectives pursued by the Community;

(ii) greater transparency of Community support;

(iii) less risk of dissipation of funds;

(iv) better monitoring and evaluation of the actual impact of the assistance.

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

Manuel Marín

Objectives of the structural Funds

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

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

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

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

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

5. **with a view to reform of the common agricultural policy:**

   (a) speeding up the adjustment of agricultural structures (Objective 5a),

   (b) promoting the development of rural areas (Objective 5b).

1. General economic background

1.1. General

Portugal's geographical composition of continental and island territories is a key factor in determining the pattern of its fisheries industry.

The continental territory, situated at the periphery of the Community and facing the Atlantic, is positioned between two important fishing zones: the North Sea and West Africa. The waters off Portugal constitute a transition zone, being the southern limit for certain species and the northern limit for others.

In contrast to the two zones mentioned, the continental shelf is relatively narrow and demersal species are therefore fewer in number; fishing depends principally on pelagic species, in particular sardines.

The two archipelagos of Madeira and the Azores, situated at a considerable distance from the continent and at the extreme periphery of the Community, consist of volcanic islands; the principal fish encountered are pelagic species, in particular tuna.

This geographical structure results in an extensive exclusive economic zone divided into three subzones corresponding to the continental territory (319 000 km^2), the Azores (938 000 km^2) and Madeira (426 000 km^2).

The fisheries sector and its associated activities have always been a major component of the Portuguese economy, representing (inclusive of upstream and downstream activities) 2% of Portugal's gross domestic product (GDP).

The importance of processed fish products, in particular canned fish, for Portuguese exports must be stressed.

In addition, the social importance of the sector can be gauged by the significant number employed (the number of fishermen per 100 000 inhabitants is the highest in the Community: 400) and when acount is taken of the absence of satisfactory alternative employment for those whose livelihood depends on fishery-related activities, particularly in the least favoured coastal regions and in the islands.

Portuguese human consumption of fishery products is, furthermore, the highest in the Community, averaging 48 kg/year per capita in 1988-89. Portugal is highly dependent on these products as a source of animal protein, given the insufficiency of exploitable national resources. Fishery products provide 40% of protein of animal origin.

1.2. Fishing fleet

As of 31 December 1989 the Portuguese fleet consists of 16 554 vessels, totalling 195 879 grt and providing more than 44 000 jobs.

In line with Council Regulation (EEC) No 4028/86 the Portuguese multiannual guidance programme for the evolution of the fishing fleet has established objectives in terms of engine power and vessel tonnage for the reduction of the capacity of the fishing fleet. As of 31 December 1989 these objectives for 1991 have been met since a reduction of 6% in terms of grt and 3% in terms of power has been achieved.

In terms of the number of fishing vessels, 82% of the continental fleet and 99% of the fleet in the islands fish in coastal waters.

In terms of fishing capacity (measured in grt or kW), however, a very significant proportion of the fleet (54% of grt or 32% of kW) operates outside the Portuguese fishing zones, principally in the North Atlantic and along the West African coast.

By comparison with 1986, when the catch totalled 403 000 tonnes, the more recent reductions in the volume of catches (350 799 tonnes in 1988 and 333 809 tonnes in 1989) have been primarily due to the increasing problems of access to the traditional fishing zones of the North and South Atlantic, notably those situated north-west and north-east of Namibia.

In order to overcome these difficulties, steps have been taken to redeploy the fleet:

(i) new fishing zones (Gulf of Guinea, Falkland Islands) to maintain supplies of certain traditional species (e.g. hake)

(ii) search for new species in traditional fishing areas (e.g. redfish in the North Atlantic).

Moreover, the development of the fleet of longliners, as well as a more autonomous and appropriate tuna fleet with adequate working facilities on board has opened new possibilities for better exploitation of available fish as well as the redeployment of traditional activity towards more selective equipment. Besides certain bottom species and certain migratory species (like swordfish), the national production of tuna — of which the level is insufficient to meet the needs of the industry — has increased considerably.

Despite a recent improvement in the situation (1989), the trade balance in fishery products continues to be highly dependent on external markets (imports and exports).

1.3. Aquaculture

Portuguese aquaculture, which started to function truly only in 1986, still represents only a fairly small part of the sector's overall activity. Production, based principally on extensive units, amounted to 11 000 tonnes in 1988, of which 7 000 tonnes consisted of clams. Since the units require several years in order to reach sustainable production, it is too soon to predict how aquaculture will develop or what its medium-term impact will be.

In any case it can be seen that the activity and level of production of mollusc farms are important for the economy of certain regions, like the Algarve.

1.4. Processing

In all, during the past few years the national industry for processing fishery products has undertaken important investments concerning the improvement of facilities and the installation of equipment for technological innovation. However, the processing industry as a whole faces a series of problems which are having telling effects, to a greater or lesser degree, in different parts of the country:

(i) antiquated infrastructure which makes it difficult to ensure health and hygiene and product quality;

(ii) the seasonal nature of fishing activity, especially for tuna and sardines;

(iii) shortage of storage capacity, which means that the industry cannot depend upon regular supply;

(iv) small diversification of processed products.

1.4.1. Canned and semi-preserved products

The canning and semi-preserved products subsector is a traditional activity of great economic and social importance.

More specifically the canning of sardines is a very important part of canned exports, to the extent that it represents almost 75% of the total. It should be stressed that the export of canned fish is the only element of commercial activity which represents a positive balance.

The principal item of production is canning in sauce (98%). There are 60 production units, 52 of which are in continental Portugal, 7 in the Azores and 1 in Madeira.

Canned sardines constitute the principal product in this category in continental Portugal (there are several types of outlets for different markets); sardine catches are relatively stable (around 100 000 tonnes), thus ensuring a production at around 30 000 tonnes per year.

In the islands, the main product is canned tuna, for which demand exceeds the current production level of around 14 000 tonnes per year.

The bulk of the raw material is supplied by the national coastal fleet, hence the importance of the canning and semi-preserved branch of the fisheries industry for the sale of products involving the predominant species, namely sardines in continental Portugal and tuna in the islands.

The canning sector is largely dependent on:

(i) the external market, which is the outlet for 70% of production (1989) and on which, particularly in the case of canned sardines, stiff competition is encountered from non-Community countries operating on the same market,

(ii) two species, sardines and tuna.

Other general problems affecting the canning sector are as follows:

(i) obsolete technology of some processing plants, with implications for product quality, sanitary working conditions, productivity and hygiene conditions;

(ii) a production structure based upon traditional products and presentation;

(iii) irregularity of supply of raw materials, due to the seasonal aspect of some fishing campaigns, combined with inadequate freezing and cold storage facilities;

(iv) reduced interest in vocational training measures.

Furthermore, mention should be made, with particular reference to the islands, of:

(i) the inadequate canning capacity in the light of the prospective increase in tuna catches,

(ii) the wide geographical distribution of production facilities in the Azores, which complicates internal circulation and increases raw material costs.

1.4.2. Freezing

The preparation of frozen products is an expanding section of the industry. The number of plants in continental Portugal increased from 70 in 1983 to 81 in 1989, 38 of which are located in the Lisbon region and the Tagus valley, 21 in the north and 18 in the central region. There is also one plant in the Azores and one in Madeira.

The subsector's chief source of supply is the high-sea fleet which operates in the South Atlantic (for hake) and the North Atlantic (for 'bacalhau' cod). However, there has also been a significant increase in the use of the fresh product landed by the coastal fleet.

In the Azores and Madeira, the raw material is supplied to the canneries primarily in frozen form, but other species are also utilized for export, particularly to North American markets.

The export potential for quality products is excellent. Exports of frozen products show a significant increase, the principal export species being dermersal (cod, redfish, flatfish, black scabbard-fish) and pelagic (sardines, horse-mackerel and tuna) fish.

However, the subsector faces various problems, in particular:

(i) technical and operational weakness at production level, due primarily to the use of obsolescent and unsuitable equipment. The development of production techniques together with the introduction of more stringent quality control are necessary for the development of this subsector;

(ii) finished products deficient in terms of presentation and quality of packaging.

1.4.3. Drying, salting and smoking

Drying and salting is a fisheries activity which has traditionally depended on North Atlantic cod. As a result of restrictions imposed on the fleet operating in this area, the supply of cod is increasingly reliant on imports of green-salted cod. The domestic raw material shortage, combined with an insufficiently diversified range of species for drying and salting, results in excess capacity and a reduction in the number of processing plants.

The smoking subsector, as yet relatively undeveloped, is expanding fast, profiting from the growth in the number of aquaculture enterprises which constitute, along with swordfish, its principal source of supply.

National consumption of smoked products is limited, partly because these are non-traditional products and also on account of their high price. Production is therefore geared chiefly to exports, hence the need to improve the quality-price ratio, given the strong competition faced by such products on international markets.

The future prosperity of the smoking subsector requires improvements in technical know-how, specialized manpower training, promotion campaigns to encourage national consumption, moves to diversify products using different species, and new forms of presentation.

1.4.4. Prepared products

This field, which is currently not highly developed, offers excellent prospects on account of the trend of consumer preference towards more elaborate products. The expansion of this activity would permit the use of underutilized or insufficiently exploited species, greater processing of certain raw materials and the creation of alternative products.

1.4.5. Meal and oils

This subsector, with its relatively minor status compared to the canning sector, uses cannery rejects, fish withdrawn from auction, filleting leftovers and certain species caught for the manufacture of meal.

In 1989 there were eight processing plants, mostly in northern Portugal, and two in the Azores. Production totalled 7 200 tonnes of meal and 1 800 tonnes of oil.

1.5. Marketing

1.5.1. Auction

Representing the first stage in the marketing of fishery products (fresh or chilled), fish auctions take place in the different fishing ports and therefore occur at intervals all along the coast.

There are 92 auctions in continental Portugal and one in almost each port in the Azores and Madeira. Their chief function is to regulate the landing, weighing, sale and delivery of fishery products.

The principal auctions (17) have been the subject of major reorganization, modernization and computerization, and this has brought about an improvement in service to consumers, operational transparency and price formation.

However, the other auctions continue to reveal deficiencies in infrastructure and equipment, particularly those in small ports and in the autonomous regions. Deficiencies include:

- quay and quayside unloading facilities,
- buildings,
- warehouses and installations for auction activities and product handling,
- poor conditions for product conservation and sanitary conditions,
- ice supply,
- auctioneering.

1.5.2. Cold storage and normal storage facilities

Some freezing and cold storage installations are old and obsolete and their capacity currently unable to meet market requirements. The current capacity (10 000 tonnes) of the Pedrouços installation (port of Lisbon), the largest in continental Portugal, should therefore be doubled in the medium term.

An increase in capacity is necessary if the various sectors of the industry — fishing, canning and filleting, marketing of frozen products and storage of fishery products — are to remain in a healthy state of activity.

In the Azores, the inadequate freezing and storage facilities, combined with the seasonal nature of tuna fishing, has in the last few years brought the fishing of these species to a periodic halt with serious economic and social consequences.

In other cases, many vessels have been forced to journey to more distant fishing zones, resulting in a loss of available fishing time. Up to a recent date, this situation has obliged the canneries to operate only during the fishing season.

In Madeira, cold storage units have encountered difficulty in the last few years in satisfying every demand.

1.5.3. Distribution network

Frozen products from the Portuguese industry are principally sold on the national market. The distribution of these products at a regional level, where the demand is greatest, suffers from certain deficiencies, in particular storage facilities which limits their consumption both in quantity and quality.

It is necessary to create a large effective distribution network of fishery products in areas of need. It is equally necessary to improve the efficiency and quality of distribution networks by ensuring the homogeneity and quality of the frozen fish chain in order to preserve the organoleptic characteristics of the products.

2. Priority axes for common action

2.1. Priority axes

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

The two axes are:
Axis 1: Processing;
Axis 2: Marketing.

2.1.1. Axis 1: Processing

The improvement of structures for processing fish and aquaculture products have the following objectives:

(i) to ensure economic and social progress of the processing industry and the regions concerned;
(ii) to ensure a better utilization of existing resources in the waters of the exclusive economic zone;
(iii) to reduce external dependence;
(iv) to adapt production processes to consumer demand (diversification, quality, price, etc.).

To achieve these objectives the following measures could be undertaken.

Measure 1:

Creation of cold storage facilities for the conservation of the raw material (mainly tuna and sardines) with a view to ensuring regular supply to the processing industry and improved back-up to the fishing fleet.

Measure 2:

Rationalization and modernization of tuna processing facilities, in particular:

- equipment, production lines and support installations,
- improvement in quality and hygiene conditions and in the presentation of finished products.

Construction of new tuna processing units, in order to adapt processing capacity to the increase in supply and market demands.

Measure 3:

Restructuring and modernization of sardine processing facilities with a view to the improvement of quality and hygiene conditions, and construction of new facilities, with priority to those replacing obsolete units and incorporating modern technology, with a view specifically to the production of new products and new forms of presentation.

Measure 4:

Restructuring, modernization and construction of preparation and/or processing units with a view to the sale of underdeveloped or underexploited species, or resulting from the increase in value-added and development of alternative products.

Measure 5:

Pilot/demonstration projects, technical assistance, studies.

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

2.1.2. Axis 2: Marketing

The improvement of structures for marketing fishery and aquaculture products have the following objectives:

(i) to satisfy demand,
(ii) to contribute to the stability of the market,
(iii) to improve the quality and efficiency of distribution.

Measure 1

Modernization and equipping of existing auctions (potentially, extension or replacement without increasing the total number), with a view to creating a greater concentration and efficiency of supply and improving the marketing of fresh or refrigerated fishery products. Account will be taken in particular of the following aspects:

(i) improvement in hygiene conditions and sanitary control;
(ii) improvement of landing installations, handling equipment and sale facilities;

(iii) quality control;

(iv) computerization.

Measure 2

Improvement of marketing networks, in particular through the creation of appropriate coastal and inland cold storage facilities.

Measure 3

Pilot/demonstration projects, technical assistance, studies.

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

2.2. Coordination with other Community aid

2.2.1. Common fisheries policy (CFP)

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

- Regulation (EEC) No 4028/86 on Community measures to improve and adapt structures in the fisheries and aquaculture sector;
- Regulation (EEC) No 3252/87 concerning the coordination and promotion of research in the fisheries and aquaculture sector.

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

In the implementation of Regulation (EEC) No 2321/88, setting out application procedures for Community aid under Regulation (EEC) No 4028/86 concerning fishing port facilities, Portugal has presented three specific programmes (continent, Azores and Madeira) which were adopted by a Commission Decision on 16 June 1990 (Decision No 390/89 EEC, OJ L 184, 30. 6. 1989 (continent) and Decisions Nos 90/371/EEC and 90/372/EEC, OJ L 180, 13.7.1990 (Azores and Madeira)).

2.2.2. Other objectives of the reform of the structural Funds

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

Under the Community support framework adopted on 19.12.1989 (Decision No 89/642/EEC, OJ L 370, 19.12.1989) (development and structural adjustment of regions whose development is lagging behind — Objective 1), a sum of ECU 30 million is earmarked for the processing and marketing of fishery and aquaculture projects over the period 1989-93.

Under Regulation (EEC) No 355/77, 'Fisheries' section, Portugal has received the following assistance:

- 1989, tranche 1 (June 1989): ECU 2.03 million for 4 projects;
- 1989, tranche 2 (December 1989): ECU 6.34 million for 15 projects;
- 1990, tranche 1 (June 1990): ECU 3.45 million for 7 projects;
- 1990, tranche 2 (December 1990): ECU 4.08 million for 14 projects;

Total: ECU 15.90 million for the period 1989-90.

To fulfil the commitment made previously under the Community support framework for Objective 1, the Community indicative financial assistance shown in respect of the present Community support framework, for the period 1991-93, must therefore be increased to ECU 14.1 million.

3. Forms of intervention

3.1. Forms of assistance

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

(i) operational programmes,

(ii) global grants,

(iii) suitable projects,

(iv) pilot/demonstration projects, technical assistance and studies.

Operational programmes and global grants will be the main form of assistance.

3.2. Rates of finance

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

4. Indicative financing plan

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

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

Table 1 shows funding by priority axis;

Table 2 shows funding by year.

European Investment Bank

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

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

Table 1

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

At 1991 prices

(1000 ECU)

Priority axes	Total cost[1]	Public expenditure									Private sector	Community loans EIB[3]
		Total public expenditure	Community grants				National contribution[2]					
			Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authorities	Other		
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10	11	12
New actions												
1. Processing	29 084	17 090	10 490	10 490	—	—	6 600	6 600	—	—	11 994	
2. Marketing	10 008	5 881	3 610	3 610	—	—	2 271	2 271	—	—	4 127	
New actions Subtotal	39 092	22 971	14 100	14 100	—	—	8 871	8 871	—	—	16 121	token entry
Existing commitments token entry	—	—	—	—	—	—	—	—	—	—	—	
Existing commitments Subtotal	—	—	—	—	—	—	—	—	—	—	—	—
Total	39 092	22 971	14 100	14 100	—	—	8 871	8 871	—	—	16 121	token entry

1 Only including investments which are planned for co-financing under this Community support framework.
2 Breakdown between State/region/other will be decided later.
3 Participation of the EIB will be decided later.

Table 2

Indicative financing plan by year

At 1991 prices

(1000 ECU)

	Total cost[1]	Public expenditure									Private sector	Community loans EIB[3]
		Total public expenditure	Community grants				National contribution[2]					
			Total EEC	EAGGF 5a	ERDF	ESF	Total national	Central government	Local authorities	Other		
	1	2=3 + 7	3=4 to 6	4	5	6	7=8 to 10	8	9	10	11	12
1991	11 367	6 680	4 100	4 100	—	—	2 580	2 580	—	—	4 688	
1992	18 021	10 589	6 500	6 500	—	—	4 089	4 089	—	—	7 432	
1993	9 704	5 702	3 500	3 500	—	—	2 202	2 202	—	—	4 002	
Total	39 092	22 971	14 100	14 100	—	—	8 871	8 871	—	—	16 121	token entry

1 Only including investments which are planned for co-financing under this Community support framework.
2 Breakdown between State/region/other will be decided later.
3 Participation of the EIB will be decided later.

European Communities — Commission

Community support framework — 1991-93

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

Portugal

Document

Luxembourg: Office for Official Publications of the European Communities

1992 — 21 pp. — 21.0 x 29.7 cm

ISBN 92-826-3975-4

Price (excluding VAT) in Luxembourg: ECU 6

Venta y suscripciones • Salg og abonnement • Verkauf und Abonnement • Πωλήσεις και συνδρομές
Sales and subscriptions • Vente et abonnements • Vendita e abbonamenti
Verkoop en abonnementen • Venda e assinaturas

BELGIQUE / BELGIË

Moniteur belge / Belgisch Staatsblad
Rue de Louvain 42 / Leuvenseweg 42
B-1000 Bruxelles / B-1000 Brussel
Tél. (02) 512 00 26
Fax (02) 511 01 84

Autres distributeurs / Overige verkooppunten

Librairie européenne/ Europese boekhandel
Rue de la Loi 244/ Wetstraat 244
B-1040 Bruxelles / B-1040 Brussel
Tél. (02) 231 04 35
Fax (02) 735 08 60

Jean De Lannoy
Avenue du Roi 202 /Koningslaan 202
B-1060 Bruxelles / B-1060 Brussel
Tél. (02) 538 51 69
Télex 63220 UNBOOK B
Fax (02) 538 08 41

Document delivery:

Credoc
Rue de la Montagne 34 / Bergstraat 34
Bte 11 / Bus 11
B-1000 Bruxelles / B-1000 Brussel
Tél. (02) 511 69 41
Fax (02) 513 31 95

DANMARK

J. H. Schultz Information A/S

EF-Publikationer
Ottiliavej 18
DK-2500 Valby
Tlf. 36 44 22 66
Fax 36 44 01 41

DEUTSCHLAND

Bundesanzeiger Verlag
Breite Straße
Postfach 10 80 06
D-W 5000 Köln 1
Tel. (02 21) 20 29-0
Telex ANZEIGER BONN 8 882 595
Fax 2 02 92 78

GREECE/ΕΛΛΑΔΑ

G.C. Eleftheroudakis SA
International Bookstore
Nikis Street 4
GR-10563 Athens
Tel. (01) 322 63 23
Telex 219410 ELEF
Fax 323 98 21

ESPAÑA

Boletín Oficial del Estado
Trafalgar, 29
E-28071 Madrid
Tel. (91) 538 22 95
Fax (91) 538 23 49

Mundi-Prensa Libros, SA
Castelló, 37
E-28001 Madrid
Tel. (91) 431 33 99 (Libros)
431 32 22 (Suscripciones)
435 36 37 (Dirección)
Télex 49370-MPLI-E
Fax (91) 575 39 98

Sucursal:

Librería Internacional AEDOS
Consejo de Ciento, 391
E-08009 Barcelona
Tel. (93) 488 34 92
Fax (93) 487 76 59

Llibreria de la Generalitat de Catalunya
Rambla dels Estudis, 118 (Palau Moja)
E-08002 Barcelona
Tel. (93) 302 68 35
302 64 62
Fax (93) 302 12 99

FRANCE

Journal officiel
Service des publications des Communautés européennes
26, rue Desaix
F-75727 Paris Cedex 15
Tél. (1) 40 58 75 00
Fax (1) 40 58 75 74

IRELAND

Government Supplies Agency
4-5 Harcourt Road
Dublin 2
Tel. (1) 61 31 11
Fax (1) 78 06 45

ITALIA

Licosa Spa
Via Duca di Calabria, 1/1
Casella postale 552
I-50125 Firenze
Tel. (055) 64 54 15
Fax 64 12 57
Telex 570466 LICOSA I

GRAND-DUCHÉ DE LUXEMBOURG

Messageries Paul Kraus
11, rue Christophe Plantin
L-2339 Luxembourg
Tél. 499 88 88
Télex 2515
Fax 499 88 84 44

NEDERLAND

SDU Overheidsinformatie
Externe Fondsen
Postbus 20014
2500 EA 's-Gravenhage
Tel. (070) 37 89 911
Fax (070) 34 75 778

PORTUGAL

Imprensa Nacional
Casa da Moeda, EP
Rua D. Francisco Manuel de Melo, 5
P-1092 Lisboa Codex
Tel. (01) 69 34 14

Distribuidora de Livros Bertrand, Ld.ª

Grupo Bertrand, SA
Rua das Terras dos Vales, 4-A
Apartado 37
P-2700 Amadora Codex
Tel. (01) 49 59 050
Telex 15798 BERDIS
Fax 49 60 255

UNITED KINGDOM

HMSO Books (PC 16)
HMSO Publications Centre
51 Nine Elms Lane
London SW8 5DR
Tel. (071) 873 2000
Fax GP3 873 8463
Telex 29 71 138

ÖSTERREICH

Manz'sche Verlags- und Universitätsbuchhandlung
Kohlmarkt 16
A-1014 Wien
Tel. (0222) 531 61-0
Telex 112 500 BOX A
Fax (0222) 531 61-39

SUOMI

Akateeminen Kirjakauppa
Keskuskatu 1
PO Box 128
SF-00101 Helsinki
Tel. (0) 121 41
Fax (0) 121 44 41

NORGE

Narvesen information center
Bertrand Narvesens vei 2
PO Box 6125 Etterstad
N-0602 Oslo 6
Tel. (2) 57 33 00
Telex 79668 NIC N
Fax (2) 68 19 01

SVERIGE

BTJ
Tryck Traktorwägen 13
S-222 60 Lund
Tel. (046) 18 00 00
Fax (046) 18 01 25

SCHWEIZ / SUISSE / SVIZZERA

OSEC
Stampfenbachstraße 85
CH-8035 Zürich
Tel. (01) 365 54 49
Fax (01) 365 54 11

CESKOSLOVENSKO

NIS
Havelkova 22
13000 Praha 3
Tel. (02) 235 84 46
Fax 42-2-264775

MAGYARORSZÁG

Euro-Info-Service B.T.
Rádáy u. 24/B
H-1092 Budapest
Tel. (1) 36 1 118
Fax (1) 36 1 72 83

POLSKA

Business Foundation
ul. Krucza 38/42
00-512 Warszawa
Tel. (22) 21 99 93, 628-28-82
International Fax&Phone
(0-39) 12-00-77

CYPRUS

Cyprus Chamber of Commerce and Industry
Chamber Building
38 Grivas Dhigenis Ave
3 Deligiorgis Street
PO Box 1455
Nicosia
Tel. (2) 449500/462312
Fax (2) 458630

TÜRKIYE

Pres Gazete Kitap Dergi Pazarlama Dağitim Ticaret ve sanayi AŞ
Narlibahçe Sokak N. 15
Istanbul-Cağaloğlu
Tel. (1) 520 92 96 - 528 55 66
Fax 520 64 57
Telex 23822 DSVO-TR

CANADA

Renouf Publishing Co. Ltd
Mail orders — Head Office:
1294 Algoma Road
Ottawa, Ontario K1B 3W8
Tel. (613) 741 43 33
Fax (613) 741 54 39
Telex 0534783

Ottawa Store:
61 Sparks Street
Tel. (613) 238 89 85

Toronto Store:
211 Yonge Street
Tel. (416) 363 31 71

UNITED STATES OF AMERICA

UNIPUB
4611-F Assembly Drive
Lanham, MD 20706-4391
Tel. Toll Free (800) 274 4888
Fax (301) 459 0056

AUSTRALIA

Hunter Publications
58A Gipps Street
Collingwood
Victoria 3066

JAPAN

Kinokuniya Company Ltd
17-7 Shinjuku 3-Chome
Shinjuku-ku
Tokyo 160-91
Tel. (03) 3439-0121

Journal Department
PO Box 55 Chitose
Tokyo 156
Tel. (03) 3439-0124

RUSSIA

CCEC (Centre for Cooperation with the European Communities)
9, Prospekt 60-let Oktyabria
117312 Moscow
Tel. 007 095 135 52 87
Fax 007 095 420 21 44

ISRAEL

ROY International
PO Box 13056
41 Mishmar Hayarden Street
Tel Aviv 69865
Tel. 00972 3 496 108
Fax 00972 3 544 60 39

SINGAPORE

Legal Library Services Ltd
STK Agency
Robinson Road
PO Box 1817
Singapore 9036

AUTRES PAYS
OTHER COUNTRIES
ANDERE LÄNDER

Office des publications officielles des Communautés européennes
2, rue Mercier
L-2985 Luxembourg
Tél. 499 28 1
Télex PUBOF LU 1324 b
Fax 48 85 73/48 68 17

CU-88-91-011-EN-C

Price (excluding VAT) in Luxembourg: ECU 6

ISBN 92-826-3975-4

9 789282 639757

OFFICE FOR OFFICIAL PUBLICATIONS
OF THE EUROPEAN COMMUNITIES
L-2985 Luxembourg