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(Information)

COMMISSION

Ecu (1)

27 July 1995

(95/C 194/01)

Currency amount for one unit:

Belgian and Luxembourg franc	38,4440	Finnish markka	5,67411
Danish krone	7,27696	Swedish krona	9,55430
German mark	1,86954	Pound sterling	0,847402
Greek drachma	302,907	United States dollar	1,35034
Spanish peseta	160,487	Canadian dollar	1,83713
French franc	6,48836	Japanese yen	118,721
Irish pound	0,822022	Swiss franc	1,55194
Italian lira	2148,57	Norwegian krone	8,29646
Dutch guilder	2,09464	Icelandic krona	84,9766
Austrian schilling	13,1509	Australian dollar	1,84045
Portuguese escudo	195,448	New Zealand dollar	2,01784
		South African rand	4,90239

The Commission has installed a telex with an automatic answering device which gives the conversion rates in a number of currencies. This service is available every day from 3.30 p.m. until 1 p.m. the following day.

Users of the service should do as follows:

— call telex number Brussels 23789;

— give their own telex code;

— type the code 'cccc' which puts the automatic system into operation resulting in the transmission of the conversion rates of the ecu;

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Note: The Commission also has an automatic telex answering service (No 21791) and an automatic fax answering service (No 296 10 97) providing daily data concerning calculation of the conversion rates applicable for the purposes of the common agricultural policy.

(1) Council Regulation (EEC) No 3180/78 of 18 December 1978 (OJ No L 379, 30. 12. 1978, p. 1), as last amended by Regulation (EEC) No 1971/89 (OJ No L 189, 4. 7. 1989, p. 1).

Council Decision 80/1184/EEC of 18 December 1980 (Convention of Lomé) (OJ No L 349, 23. 12. 1980, p. 34).

Commission Decision No 3334/80/ECSC of 19 December 1980 (OJ No L 349, 23. 12. 1980, p. 27).

Financial Regulation of 16 December 1980 concerning the general budget of the European Communities (OJ No L 345, 20. 12. 1980, p. 23).

Council Regulation (EEC) No 3308/80 of 16 December 1980 (OJ No L 345, 20. 12. 1980, p. 1).

Decision of the Council of Governors of the European Investment Bank of 13 May 1981 (OJ No L 311, 30. 10. 1981, p. 1).

FORWARD PROGRAMME FOR STEEL FOR THE SECOND HALF OF 1995 AND FOR 1995 AS A WHOLE

(95/C 194/02)

(Text with EEA relevance)

INTRODUCTION

Thanks to a gradual recovery in activity in the consumer sectors, the Community's economic performance in 1994 and in the first part of 1995 brought demand for steel products up to very satisfactory levels.

In the second half of 1995, as indicated in this programme, the trend on the Community steel market should continue to be positive, though consumption should increase more gradually, with further price rises, even if the volume of imports remains high and exports fall back a little.

On the world market, the growth rates expected in various regions should continue to boost steel consumption, thereby providing good opportunities for traditional exporters, despite the weaker dollar.

This evolving overall picture therefore offers a favourable outlook for the whole of the Community's steel industry. However, this is a quite exceptional stage in the economic cycle and should not blind the Community's steel producers to the need for continued restructuring. The difficulties of a possible turn-around in the economic cycle should not be under-estimated.

The Commission will remain vigilant and will continue, in the interests of the Community industry, to follow developments on the internal and external market.

1. THE ECONOMIC SITUATION IN THE COMMUNITY

In almost all the Member States of the Community the economic recovery was more marked in 1994 than had been expected, under the combined impact of a favourable international environment, monetary stability and a significant improvement in business confidence. Latest estimates show that for the Community as a whole (EUR 15) economic activity produced growth of 2,75 % in 1994 thanks mainly to exports and restocking.

The most recent economic surveys (which take some account of the currency crisis of February/March 1995) show that confidence remains very high in the industry, at a level comparable to that recorded during the economic upturn of 1989/90, though activity does not appear to be increasing as rapidly as in recent months. This suggests that even if the economic recovery remains on track it might still show signs of levelling off. Also, although the recent upheavals on the exchange markets will probably have a significant impact on the prospects for growth in each Member State, the forecasts for the Community as a whole are not radically different.

Community exports will probably fall back slightly following the strong growth achieved last year (approximately 10 %), while still remaining buoyant in 1995. The anticipated fall is due both to the strengthening of the main European currencies and to weaker market growth outside the Community.

The acceleration of the economy, resulting from strong exports, has had a major impact on investment in durable goods. In view of the high level of business confidence and the high rates of capacity utilization, investment in durable goods should replace exports as the driving force of growth. This increase in investment is essential for sustained recovery as it will help relieve the recent pressure on capacity.

Despite some improvement in employment and higher wages, private-sector consumption should see a more modest expansion.

The prospects for the labour market are slightly better this year. Unemployment peaked in spring 1994 and fell back slightly to an average 10,8 % of the Community's working population in March 1995.

The reduction in inflation throughout the Community probably bottomed out at the beginning of this year. Average inflation in the Community should remain vitrually unchanged at a little over 3 % (measured by the private comsumption deflator). However, this aggregate figure hides results which differ from one Member State to another.

2. REVIEW OF THE STEEL MARKET

2.1. CRUDE STEEL PRODCUTION IN THE COMMUNITY

Having resumed an upward trend in January 1994, steel production was increasing markedly by the end of the year, totalling 138,9 million tonnes for the year as a whole, i.e. 5 % more than in 1993.

This increase in production was brought about gradually by a clear recovery in the activity of the steel-consuming industries, such as motor vehicles and engineering, rather than by exports, which fell considerably.

Of the Community's major steel producing countries, Germany increased its production by approximately 8 % in 1994, with more modest increases in Spain (+ 4,7 %) and Italy (+1,3 %), a levelling-off of production in the United Kingdom and a fall of 2,4 % in France.

The trend in Community production since 1994 and the closures which formed part of the recent restructuring of the steel industry have led to a more rational exploitation of tools, for which the average rates of utilization have improved significantly.

Since the beginning of 1995 Community steel production includes that of Austria, Finland and Sweden, following those countries' accession to the European Union. Analysis of the statistics available for the Community of Fifteen shows that during the first four months of 1995 steel production rose by 4,4 % against the level reached during the corresponding period in 1994.

If this trend continues, production should reach around 73 million tonnes for the first six months of 1995 and something like 157 million tonnes for the year as a whole. This would represent a divergence of + 3,2 % und + 2,8 % respectively from the forecasts of the previous programme (1).

Table 1 'Crude steel supply and demand' (see Annex), shows the levels of and recent trends in Community consumption, external trade, production and stocks, and gives estimates for the second half of 1995 and revised estimates for 1995 as a whole.

For the sake of clarity and to make comparisons possible following the enlargement of the Community in 1995, the table has been divided into two parts relating to the Community of Twelve (Table 1) and the new Member States (Table 1a).

(1) Forward programme for steel, OJ No C 73, 25. 3. 1995.

2.2. ECONOMIC OUTLOOK FOR THE SECOND HALF OF 1995

A. *The Community of Twelve*

The strong upturn in the Community economy at the end of 1994 continued throughout the first half of 1995, but seems set to slow down somewhat during the second half of the year.

Nonetheless, the Community's economic growth, now generated mainly by investment and industrial activity, now has a more stable basis and offers good overall prospects for the future.

This economic upturn has brought about a major improvement in the conditions on the steel market, with prices and the volumes of sales gradually on the increase. As indicated further on in this programme, however, trends have not been the same for all product categories.

Following a year of uninterrupted improvements, the economic climate indicator tailed off somewhat, and fell back slightly last February/March. However, trends in economic indicators vary according to the economic sector in question and can sometimes vary greatly from one country to another. While the industry's confidence is little affected by the falling dollar, consumer confidence has fallen slightly. In Germany and the United Kingdom the economic climate has suffered from the loss of confidence in the building industry, in Italy from consumer uncertainty and in France from the pessimism felt in the industry.

Nonetheless, at recent meetings consumer representatives expressed fairly optimistic views on the general developments expected in the second half of 1995. The only uncertainties focused on problems of monetary parities and the trends of activity in certain consumer sectors.

Otherwise, the few tensions reported on here and there, notably regarding coils and other flat products, no longer seem present, their root causes having disappeared. On the other hand, a few supply difficulties have been reported for products made of special steels, for which the delivery periods have become particularly long on certain markets.

Steel dealers, while confirming the improvement on the steel market despite the still precarious situation regarding long products, were somewhat guarded about the outlook for the second half of 1995 on account of the end of the restocking period and the imbalances caused by the depreciation of certain currencies.

Generally speaking, activity in the steel-consuming sectors (some of which are analysed in greater detail on the basis of information provided by the industry) in the second half of 1995 should remain fairly constant in the car industry but slow down slightly in the mechanical engineering, electronics, and shipbuilding industries. The construction sector should expand slightly, while the aeronautics and other motor vehicle industries should continue their downward trend.

Tables 2 and 2a (see Annex), for which the data have been supplied by the national representatives of steel consumers, show the foreseeable development in the second half of 1995 and in 1995 as a whole. The opinions expressed on the pace of activity in the various sectors do not always accord with the trends resulting from the business activity indicators, so they should be treated with caution.

B. *The new Member States*

Austria

The Austrian economy is continuing to improve, and growth in 1995 is forecast at between 3 and 3,5 %.

Steel consumption went up by 6 % during the first four months of 1995 and certain supply problems became apparent, notably for flat products, tubes, merchant bars and beams. This situation has resulted, in particular, from the drop in imports from the EC, which were not replaced by deliveries from other EU countries.

The only sector going through a slack period in Austria is construction, and this is affecting sales of concrete reinforcing bars.

The general outlook for the second half of 1995 and for 1995 as a whole is very good, given the high level of activity in the main steel-consuming sectors.

Finland

The Finnish economy enjoyed a boom in 1994, with growth of 4 %, and is set to do even better in 1995 thanks to exports and private investment.

Consumption and production of steel rose by more than 10 % in 1994, and the trend will most probably continue in 1995.

Activity is intense in the mechanical engineering industry, which is the country's main consumer of steel, though car production remains modest. Shipbuilding is doing well and the manufacture of electrical machinery is enjoying exceptional growth. The only sector in recession is building and public works, where the very low level of activity is affecting the situation of the corresponding steel products, even if some slight recovery seems possible in the second half of 1995.

Sales of flat products rose by 30 %. Prices of flat products are fairly high and delivery periods are getting longer.

All in all, Finland's economic situation is quite outstanding, and should remain so at least until the end of 1995. It should be borne in mind, though, that the country went through a period af recession from 1991 to 1993.

Sweden

Investment is rising sharply in Sweden and is the principal factor of growth there. The Swedish steel industry is currently doing very well, thanks to the structural changes of recent years. Steel prices are remunerative and the krona is trading at a rate which continues to favour exports, which should improve further in the second half of the year.

The main consumer sectors are continuing to do well in 1995, especially cars, mechnanical engineering and even other means of transport. Only the building trade will maintain a negative trend in 1995.

2.2.1. **Primary processing**

The general economic recovery in the Community, more apparent since the second half of 1994, is continuing to support the activity of the primary processing industry.

However, the various parts of the industry are performing differently depending on their user industries. Those supplying the car industry, e.g. cold rolling, drawing and seamless tubes, are enjoying a more marked improvement in activity than those serving the building and public works sector, such as wire-drawing and forming of steel products. The general situation of the primary processing industry should not change significantly in the second half of 1995, as its order books are well filled.

A. *Steel tubes*

Following the strong recovery in the manufacture of steel tubes in 1994, with production rising by approximately 10 %, activity has levelled off completely in 1995.

Recent surveys suggest that, in terms of volumes and prices, the steel tube market will enjoy the same satisfactory levels in 1995 as in 1994, with the result that overall production will remain the same, i.e. 11,3 million tonnes.

However, tubes intended for the oil and gas industry (OCTG) are showing no sign of recovery, as drilling and transport activity (pipelines) is very limited.

Any pick-up in this activity, especially the replacement of gas pipelines in Russia (following the frequent ruptures), would guarantee a substantial increase in volume for this type of steel tube.

Despite this situation for OCTG, the recovery of the market has meant that steel tubes as a whole have regained the production and price levels of 1992, with a significant improvement in the financial positions of businesses.

Business results should be fairly satisfactory this year thanks to wider profit margins and better use of production tools, as a result of increased production and closures, even if in some cases results have been influenced by the recent currency upheavals.

B. *Wire-drawing*

The half-year forecast is for a slight slowing-down in wire-drawing activity, which will mean only a slight expansion in production (+ 3 %).

This trend seems to be due to the expected weakening of the construction industry in Germany, and to a lesser extent to the levelling-off of activity in the European motor industry.

Because of its intermediate position the wire-drawing industry finds it difficult to pass on increases in the price of raw materials to its customers quickly. However, even if sales volumes are satisfactory, business profit margins are still narrow and will no doubt be hit by less remunerative exports caused by the weak dollar.

Activity in the general drawing industry, on the other hand, is doing much better, in terms both of sales volumes and prices. These trends are due to the industry's very close links with the car and mechanical engineering industries, which have been doing well since 1994. Accordingly, production of drawn products could increase by approximately 10 % in 1995.

C. *Rolling and forming of steel strip*

The cold-rolling industry has been doing very well since 1994. At present, thanks to the demand from the car industry, the cold-rolling industry is making full use of its capacity and has orders to keep it busy until September. On the raw materials supply side, it has had problems recently obtaining high-carbon strips.

A slight slowing-down of activity is forecast for the second half of the year as orders level off. After a growth in orders of some 25 to 30 % in the first half of the year, there will be a slight falling-off in the second half as things quieten down in the car industry.

Even so, the increase in production in 1995 could be 10 % greater than that of 1994, which was itself considerable.

The market for cold-formed steel products has improved significantly since the end of 1994, and in particular during the first half of 1995. After a slight increase of approximately 2 % in 1994, demand for steel sections could grow by a further 5 % in 1995 thanks to industrial investment in building and transport equipment.

The shelving situation is not so good, whether for wide sections or for long sections. This being a proximity market, the industry is not geared towards exports to non-Community countries, so the improvement in the market for these products can be attributed solely to developments within the Community.

The industry has managed, albeit with some delay, to pass on the price increases of its raw materials, but business results and finances are not much better than before, despite a better use of installations.

2.2.2. **Situation in the construction sector**

The Community's economic recovery in 1994 generated great demand for the construction of new housing and the renovation of the existing housing stock.

In the same year the non-residential sector enjoyed an economic turnabout, with a slight increase in demand which should be consolidated during 1995. A very slight improvement was seen in the public sector, despite the general trend in the Member States of reducing the public deficit through more restrictive economic policies.

Overall construction activity will have grown in volume by approximately 3 % in 1994, sustained mainly by the very considerable increase in construction in Germany (+ 8 %).

The forecast is similar for 1995, even if developments vary widely from one Member State to another.

In Germany the sector should expand by approximately 4 % this year, thanks largely to strong growth in the new *Länder* since building activity in the former West Germany will increase only very slightly. In the United Kingdom there should be a modest increase (1,5 %), thanks in particular to the residential sector. The residential sector should also produce a positive development in Spain (+2,2 %), while construction activity in France is likely to remain static. The only country which will continue its negative trend in this sector is Italy (– 2 %), with a forecast shrinkage of 6 % in the construction of new housing.

As for the new Member States, Finland and Sweden should see growth in the sector of 7 % and 3 % respectively in 1995, following a very poor performance from 1990 to 1994, while Austria should improve its growth (3 %) thanks to the healthy position of the housing sector.

The developments expected in the subsectors in 1995 indicate a considerable increase in the construction of new housing in Germany (+ 15 %), the United Kingdom, the Netherlands, Finland and Austria. Weaker growth is forecast for the renovation and maintenance of the existing housing stock following the withdrawal of state financing measures. A modest recovery (2 %) could take place in the non-residential subsector, particularly in Germany and the United Kingdom, after the widespread falls in 1993 and 1994 in both private-sector and public-sector non-residential construction. Even weaker growth is possible for civil engineering, which is still being affected by restrictive budgetary policies in various Member States.

2.2.3. **Motor industry**

Car sales in the Community rose by about 6 % in 1994, despite the fact that tax increases and the high level of unemployment in some countries did not hold out much prospect of a market recovery. Thus the government incentives in some countries to renew the vehicle fleet have been a success, enabling the motor industry to come out of the 1993 recession rapidly. Considering, too, that car production in Europe rose by 12 % in 1994, it is clear that even exports of vehicles from the Community developed very favourably last year.

New vehicle registrations in the Community increased by about a further 2,5 % in the first quarter of this year, since not all the State incentives for car purchases have expired.

During this period, the growth in vehicle registrations was significant in France (+ 11 %) and more modest in Italy (+3 %), Spain (+ 3 %) and the United Kingdom (+ 0,7 %), while in Germany registrations fell by 1,3 %.

There is, however, unlikely to be a fall in registrations in the Community in the second half of 1995 once the last incentives have expired. The tax increases in the past in Germany and the United Kingdom will no longer discourage consumers, just as in Italy, where there is renewed confidence.

The estimated increase in vehicle resgistrations in the Community for 1995 as a whole is thus put at + 3,3 %, and the outlook for 1996 is even brighter.

2.3. OUTLOOK FOR IMPORTS AND EXPORTS IN THE SECOND HALF OF 1995 AND IN 1995 AS A WHOLE

2.3.1. **External trade statistics**

Having reached record levels in 1993 (22,7 million tonnes), the Community's steel trade surplus declined significantly in 1994.

The statistics available for the first 10 months of 1994 show a drop of 35 %, indicating a probable surplus of about 14 million tonnes for 1994.

However, this phenomenon is attributable to a sizeable increase in imports of steel products to the Community, which rose by about 40 % between January and October, rather than to a contraction in Community steel exports, which declined by only 10 % over the same period.

As far as steel imports to the Community are concerned, those from central and eastern Europe more than doubled in the first 10 months of 1994. On the export side, the continuing growth in exports to the United States of America helped to offset somewhat the sharp drop in steel exports to other destinations, especially China.

There will be some changes in the Community's external trade statistics in 1995 following the enlargement of the European Union from 12 to 15 members.

It is also highly probable that overall steel exports from the Community will be greatly affected by the depreciation of the US dollar.

However, it is possible that by promoting American exports the dollar's weakness will encourage manufacturing activity in the United States of America and thus stimulate steel demand. In that case the shortage of steel in the United States of America and growing demand for steel products in South-East Asia could be met only in part by the Community industry, which is facing an upswing in internal demand.

Community steel imports, by contrast, are likely to stabilize at their high 1994 levels in view of the upturn in demand from the main consumer sectors.

2.3.2. **United States market**

Having peaked in 1994 with a growth in GDP of 4,1 %, the US economy seems unlikely to exceed 3 % growth in GDP in 1995.

However, the marked depreciation of the dollar could stimulate US exports and boost industrial production in an economy which is generally slowing down. There would then be a levelling-off in the motor industry and mechanical engineering and a slight increase in construction activity.

These developments would produce a slight increase in real steel consumption of approximately 2 % in 1995, which, alongside a marked tendency to reduce stocks, would lead to a significant reduction in apparent consumption of approximately 9 %.

Despite an upward trend in indirect exports, however, steel production will probably weaken somewhat in 1995 owing to reduction of stocks.

2.3.3. **Japan**

There could be a growth of some 2,5 % in Japan's GDP in 1995, due primarily to an active investment policy and the reconstruction of the Kobe region, devastated by the earthquake in January 1995.

The investment recovery in electronics, capital goods and construction activity, and the stabilization of private consumption will more than make up for the significant slow-down in exports, badly hit by the appreciation of the yen.

The steel industry should develop favourably in 1995 following the growth in public investment, and Japanese steel production is likely to expand by about 4 % in order to satisfy the extra demand for long products in particular generated by the rebuilding of Kobe.

The Japanese steel industry will thus be busy supplying the domestic market, where consumption is expected to rise by more than 3 % in the second half of 1995, so that it will export less steel to South-East Asia in particular, creating new export opportunities for other producers.

2.3.4. **China and South-East Asia**

The economies of South-East Asia are continuing to expand as vigorously as in recent years, resulting in a steady rise in steel consumption and increased demand for imports of steel products.

Steel consumption in the region is likely to rise by about 6 % in 1995 and demand for steel products should be approximately 110 million tonnes, leaving a shortfall of about 25 million tonnes to be covered from imports.

The austerity plan adopted by China towards the middle of 1993 in order to contain inflation may well be relaxed somewhat in the coming months. In this case, both domestic steel production and comsumption might pick up again, thanks to demand from the motor industry in particular.

There is also a possibility that, in order to reduce its steel stocks of 30 million tonnes, China might increase its exports of steel products to Japan in particular, taking advantage of the appreciation of the yen. By contrast, China's steel imports will probably not exceed 10 million tonnes, compared with 30 million tonnes in 1993 and 23 million tonnes in 1994.

Steel production in China could amount to 84 million tonnes in 1995, as against 80 million tonnes in 1994, and it will continue to grow in future in view of the investments in progress.

2.3.5. **Latin America**

Despite the uncertainties caused by the Mexican crisis, the economy of the region is continuing to develop favourably, influenced by very sustained growth in Brazil, which devalued its currency against the dollar to support exports.

Apparent steel consumption in the region, which is expanding at the rate of 4 %, could reach 40 million tonnes overall in 1995. Exports of steel products from Latin America could dip somewhat in the second half of 1995 in response to the foreseeable growth in internal demand. This would lead to an increase of about 6 % in steel imports to meet demand from the motor industry in particular.

2.3.6. **Central and eastern Europe/CIS**

Following the emergence of a trend towards recovery in 1994, the economies of central and eastern Europe could grow by a further 4 % in 1995, the same rate as last year, due mainly to intense export activity. This predicted growth, now that the critical phase of the transition period has passed, will not be the same in all countries. Thus the situation is much improved in Poland and Slovenia (+ 5 %), compared with relative stagnation in Bulgaria and Croatia.

The climate of stability should favour local steel consumption in the second half of the year, and exports of steel products may well be weak or slow down.

The situation of the countries of the former Soviet Union is much less favourable. A negative trend (— 15 %) in Russia in 1994 will be followed by a 0 % growth rate in 1995, and the prospects in the other republics are scarcely more encouraging.

Despite the weakness of the Russian market, the probable increase in steel production to 50 million tonnes in 1995 is unlikely to disrupt the international market.

2.3.7. **Middle East/Africa**

The economy of the region is showing signs of recovery, although the growth in public sector deficits, notably in Saudi Arabia and Iran, could affect the results in 1995.

The steel sector in these countries is performing well, with an increase expected in both consumption and production. Imports will continue their upward trend, mainly in long products, to meet the demand resulting from a revival of activity in Egypt.

2.4. PRICES

The economic trends described in this programme have led to a substantial improvement in the situation of the steel market, further fuelled by the need to rebuild stocks. This improvement has not, of course, been the same for all steel products.

Demand for certain products is very sustained, and manufacturers' order books are full for several months. This is true of flat products in general, stainless steels, alloy steels and wire rod, other than for the construction industry. The prices of all these products have been rising steadily for almost two years now; the increases applied quarterly by producers have been easily absorbed by the market, and delivery periods have lengthened. Despite the substantial price increases, current levels are lower than in 1989 and what is in fact occurring is a making good of the steady decline in prices during 1991, 1992 and part of 1993.

However, the situation is still not completely satisfactory for certain other products, notably those dependent on the construction trade, such as reinforcing bars, wire for mesh reinforcement and beams.

These products are suffering the effects of a low level of activity in the user sector, a depressed export trade, competition from cheap imports from certain non-Community countries and the increase in the already high price of scrap.

The glut on the market thus prevented these products from making good the sharp decline in prices between 1990 and 1992, and the sporadic price rises over the last few months scarcely cover the increase in production costs.

Export prices (in dollar terms) have risen sharply due to heavy demand mainly from the markets of South-East Asia. However, the depreciation in the dollar against European currencies over the last few months has considerably eroded the profitability of those exports.

2.5. TRENDS BY PRODUCT

Flat products

— *Hot-rolled coil*

Demand for coil remains good and further price increases are expected before the end of 1995 although the devaluation of currencies such as the lire, peseta and pound sterling could create tensions on the market. Deliveries of coil to these countries' markets by other Community producers have to be made at less advantageous prices, which is leading to a shortfall in supply.

— *Cold-rolled sheet*

The level of activity in most client sectors, such as the motor industry and its subcontractors, domestic electrical appliances and metal drums, is particularly good. However, there are uncertainties regarding the development of these sectors, since government incentives to buy new cars are soon to expire and the period of stockbuilding, primarily in the steel service centres, is drawing to a close. As for coil, some price increases are still possible before the end of the year if the currency problems of the last few months do not disturb trade flows between the different markets.

— *Coated products*

The situation of these products is particularly good. Plant utilization rates are high, and order books are full for several months, thanks mainly to the motor industry and domestic appliances sector. The only weak spot is the low level of demand for galvanized sheet from the construction industry. In such a context, however, prices are oriented upward and should maintain this trend throughout 1995.

— *Quarto plate*

The situation of these products is very positive. World demand is currently sustained and the European market has firmed considerably over the last few months. Recent developments have favoured price rises, which were necessary in view of the very low levels reached over the last few years. This trend is due in part to the stockbuilding that has been in progress for some months. However, the trend in demand is likely to be more moderate in the second half of the year, the more so as these products are exposed to fierce competition from imports from outside the Community.

Long products

— *Heavy sections and beams*

The market situation varies considerably according to country. In the United Kingdom demand appears to be tailing off but will remain at a very high level. In most other countries, more particularly Spain and Italy, a moderate increase in demand is expected during the latter half of the year. The situation in France and Germany is less favourable owing to dealers' stocks and the pressure of imports from non-Community countries. The world market continues to offer good export opportunities, especially to the Far East, although the weakness of the dollar is making such sales unattractive.

— *Wire rod*

This category covers products for the building trade and products used in other sectors such as mechanical engineering and consumer goods. In the former case, wire for mesh reinforcement is suffering the effects of low construction activity, competition on the European market and imports from the traditional non-Community sources as well as from new sources such as Egypt or India. The only positive factor is the slight fall in scrap prices recorded at the beginning of April.

In the latter case, wire rod for drawing, cold heading, free cutting or the motor industry (steel cord for tyres) is performing well owing to bouyant activity in the client sectors.

— *Reinforcing bars*

In 1994 deliveries of reinforcing bars in the European Union increased by only 2 %, while exports fell by 25 %. The continuing weakness of internal demand, the unattractiveness of the world market owing to the collapse of the dollar and competition from the Commonwealth of Independent States (CIS) and Turkey in particular are creating a glut on the European market which leaves no scope for the necessary recovery in prices of these products.

— *Marchant bars*

As in the case of wire rod, the situation differs considerably depending on the end use of these products. Generally speaking, however, demand is steadily growing with a certain amount of stockbuilding. Prices are thus moving upward, and delivery periods are tending to lengthen.

2.6. CRUDE STEEL BALANCE FOR THE SECOND HALF OF 1995 AND FOR 1995 AS A WHOLE (1)

The growth in industrial production triggered by export activity and increasingly by the recovery in investments has led to a spectacular increase in apparent steel consumption in the Community, that could probably be put at approximately 15 % in 1994.

Activity in the main consumer sectors, except for building and public works, gathered even more momentum in the first half of 1995, resulting in a further growth in steel consumption of the order of 6 %.

The forecasts for the second half of the year set out in this programme show a slight slowdown in the motor industry, a favourable trend in mechanical engineering, electrical engineering and shipbuilding, while the building trade and public works are showing minimal growth.

These trends will probably imply a more modest, but nevertheless tangible increase in Community steel consumption with imports remaining at a fairly high level.

On the basis of these trends, actual steel consumption in the Community of Twelve should be approximately

(1) See Table 1 and 1a in the Annex.

65 million tonnes in the second half of 1995, an increase of 2,2 % over the same period in 1994. Apparent cosumption, increasing by 2 %, is predicted to reach 65 million tonnes. In view of a slight decline in imports of 5,8 % and the stabilization of exports, steel production should reach 70,5 million tonnes, an increase of 2,5 %. Given the probable developments in the new Member States, equilibrium production in the Community as a whole should be 77 million tonnes.

For 1995 as a whole, actual steel consumption in the Community of Twelve is likely to be 131 million tonnes, an increase of 3,7 % compared with that of 1994. Apparent consumption is expected to be 131,5 million tonnes, 4,2 % more than in 1994, owing to some rebuilding of merchants' stocks during the first six months. Steel production, for its part, will probably stand at 143,5 million tonnes, an increase of 3,3 % over 1994, given the stabilization of imports and a foreseeable slight decline in exports. On the basis of the likely trends in the new Member States, annual equilibrium production should be 157 million tonnes for the Community as a whole.

3. RAW MATERIALS

3.1. SCRAP

The upward trend in scrap prices which emerged in autumn 1992 intensified in 1993, followed in 1994 by a stabilization that lasted until March 1995. After a few weeks of slight decline in March and April, the scrap price started to climb again and is now maintaining its fairly high level, with some minor variations. The current scrap price is sustained by strong demand related to the increase in steel production and the temporary limitation of supplementary deliveries of billets from the CIS and China owing to transport problems.

Supply problems involving pre-reduced products are also a contributory factor to the current situation of scrap prices.

Nevertheless, even if demand related to the trend in electric steel production shows steady growth, scrap prices may well slip slightly when deliveries of pig iron and pre-reduced products regain satisfactory levels.

3.2. IRON ORE

The increase in steel production in the first few months of 1995 led to a virtually parallel increase in iron ore consumption. This confirms the trends towards the recovery of the iron ore market already recorded in 1994, when production increased by 2,6 % over 1993.

With regard to the prospects for the second half of 1995, a 5 % growth in production and exports of iron ore is expected for the OECD countries. These estimates are based above all on the trend towards rebuilding of stocks. Furthermore, production of iron ore in the former Soviet Union and in China and the related trade could increase slightly during that period.

The prices negotiated for 1995, following three years of consecutive decline, showed an increase of between 6 and 12 % depending on the quality and type of ore.

3.3. FERRO-ALLOYS

A combination of two main factors, namely the high level of steel production since the second half of 1994 and the continuing logistical difficulties of the eastern European producers, has brought about the very favourable situation of the Community ferro-alloys market, which is such that the harmful effects of certain low price imports have been temporarily attenuated.

Generally speaking, Community ferro-alloy producers have been able to increase their output, with optimum capacity utilization, and they have also achieved high selling prices. However, the increase in demand has caused tensions on the market in the case of some grades required for the production of special steels, such as ferro-molybdenum and ferro-chromium. The return to normal should be confirmed in the case of ferro-molybdenum in the second half of 1995 following the reopening of mines already closed, while there will probably be a further increase, albeit moderate, in demand and prices for the other ferro-alloys.

3.4. NICKEL, ZINC AND TIN

The growth prospects for producers of austenitic steel announced in the previous forward programme appear to have been underestimated, and they will remain at a comparable level until the end of 1995 under the influence of very buoyant internal demand and increased requirements generated by economic growth in South-East Asia.

Nickel demand will be covered from traditional supply sources, which are likely to be supplemented by the new capacities due to become operational in the second half of 1995 in Canada and Australia. Russian exports, for their part, are likely to exceed slightly those of 1994, and it is significant that prices have been controlled recently.

Leaving aside the explosion of prices at the beginning of this year triggered by speculation on the commodity markets, nickel prices will remain at a high level thanks to the excellent growth prospects of stainless steel. These prospects are leading nickel producers to plan the necessary investments to ensure a better balance of supply and demand.

The forecasts for zinc in 1995 are based on the continuation of the significant increase in zinc consumption in the western world, which may reach 6,1 million tonnes or + 4,8 % compared with 1994.

Consumption in Europe is likely to be 2,1 million tonnes, which is 5,6 % more than in 1994; in the United States of America it will probably increase by 2,7 % following the spectacular rises of 1992 to 1994, while there will be only a moderate increase in Japan.

Zinc consumption in eastern Europe could rise to 1,2 million tonnes in 1995, as against 1,08 million tonnes in 1994, and exports from those countries will probably remain at the same level as 1994, namely 500 000 tonnes.

World consumption this year should be around 7,2 million tonnes as against 6,9 million tonnes in 1994, while production is unlikely to exceed 7,3 million tonnes.

Following the speculative trading of the first six months, zinc prices should remain stable in the second half of 1995.

Demand for tin remains buoyant and London Metal Exchange stocks, although lower, should be enough to cover this demand. Given China's intentions of not exporting more than 20 000 tonnes in 1995, tin prices will probably remain high throughout the year.

4. EMPLOYMENT

Completion of the restructuring plans in progress will be reflected at the employment level in subsequent reductions in the Community steel workforce.

In Belgium, the steel industry will continue to shed jobs in 1995, although fewer than in the previous year. Employment in the industry has contracted over the last three years by about 13 %, so that the workforce now numbers no more than 22 00.

The German steel industry will continue its restructuring efforts in 1995. Around 36 000 jobs were cut in 1993 and 1994, taking the workforce below the 100 000 mark. A further 8 000 workers will lose their jobs in 1995.

The French steel industry has managed to keep redundancies down to 2 % of the workforce, thanks to special measures such as flexible working arrangements, early retirement and the introduction of a compensation system for a long period of part-time work. These measures also had the aim of encouraging the recruitment of young workers, in order to correct the age pyramid in the industry.

A rescue plan aiming to cut 200 of the 550 jobs in the Irish steel industry was launched at the end of 1994 by the sole Irish producer. This plan is now being implemented.

In Italy, the closure of 25 plants had been announced for the spring of 1995. The workers affected by these closures will be covered by a recent law on early retirement concerning 15 500 employees and by the 1991 legislation on redundancies.

There have been many redundancies in Greece, and in Luxembourg the restructuring plan is in progress, with 417 early retirements approved and 351 planned for 1995.

The Dutch producer will continue to implement the social plan drawn up for the years 1992 to 1995. This concerns about 2 300 employees, 300 of whom will be made redundant in 1995.

The Spanish restructuring plan will affect some 10 % of the workforce, while in Portugal application of the 1993 to 1997 five-year plan has slowed down somewhat and it has been possible to limit job losses to 238 in 1994 and 463 in 1995. The closure of a small producer will cost a further 80 jobs in Portugal between 1994 and 1995.

Some 2 000 workers were made redundant in the United Kingdom in 1994, and a further 400 jobs are to go in 1995.

Under the Commission's traditional readaptation aid programme, ECU 157 million was committed in 1994 and a further ECU 135 million has been entered in the draft supplementary budget for 1995. Under the additional programme for steel social measures, ECU 60 million was committed in 1993 and ECU 86 million in 1994. An appropriation of ECU 60 million has been entered in the draft supplementary budget for 1995.

ANNEX

TABLE 1

Crude steel supply and demand (EUR 12) (1)

(million tonnes)

	Outturn (R1)			Estimate (R2)	Forecast	
	First half 1994	Second half 1994	1994	First half 1995	Second half 1995	1995
Apparent user consumption (a)	62,75	63,60	126,35	66,00	65,00	131,00
Change in merchant stocks (b)	− 0,20	+ 0,10	− 0,10	+ 0,50	± 0,00	+ 0,50
Apparent consumption	62,55	63,70	126,25	66,50	65,00	131,50
Imports EUR 12	7,55	8,50	16,05	8,00	8,00	16,00
Exports EUR 12	15,90	13,50	29,40	14,50	13,50	28,00
Change in producer stocks	− 0,80	+ 0,10	− 0,70	± 0,00	± 0,00	± 0,00
Production	70,10	68,80	138,90	73,00	70,50	143,50

(1) Conversion factor of finished products to crude steel: 1,11.

(R1) Revised figures.

(R2) Partially revised.

(a) This aggregate is close to actual consumption. It includes changes in consumer stocks, and merchant stocks in all countries except Germany, France, the United Kingdom and Benelux.

(b) Change in merchant stocks in Germany, France, the United Kingdom and Benelux.

TABLE 1a

Crude steel supply and demand

(Countries acceding to the Community in 1995)

(million tonnes)

	Outturn (R1)			Estimate (R2)	Forecast	
	First half 1994	Second half 1994	1994	First half 1995	Second half 1995	1995
Apparent user consumption	—	—	—	—	—	—
Change in merchant stocks	—	—	—	—	—	—
Apparent consumption	4,33	4,69	9,01	4,65	4,70	9,35
External trade balance	2,27	1,48	3,76	2,35	1,80	4,15
Change in producer stocks	—	—	—	—	—	—
Production	6,60	6,17	12,77	7,00	6,50	13,50

(R1) Revised figures.
(R2) Partially revised.

TABLE 2

Indicators of activity — EUR 12 (1)

(Not seasonally adjusted)

Sectors	Second half 1994 (2)	Second half 1995 (2)	1994 (3)	1995 (3)
Manufacture of metal articles	105,7	108,1	103,2	106,8
Mechanical engineering	106,2	112,2	104,3	110,7
Electrical engineering	108,7	115,4	106,6	113,1
Motor vehicles	114,3	118,4	113,6	121,8
Other means of transport	102,9	106,6	102,2	104,7
Building/civil engineering	106,0	108,2	101,6	102,6

(1) These indexed forecasts of the level of activity of the various steel-consuming sectors indicate trends half-year by half-year. They are derived by weighting national data provided by the trade associations of the main steel-consuming industries. Some figures are estimates as the data for certain countries are not available.
(2) Second half 1993 = 100.
(3) 1993 = 100.
Source: Commission data.

TABLE 2a

Trends in the steel-consuming sectors in the main producer countries (1)

(Activity indicators (2))

Member State Sector/Indicator	Germany		France		Italy		United Kingdom		Spain	
	Second half 1995	1995	Second half 1995	1995	Second half 1995	1995	Second half 1995	1995	Second half 1995	1995
Manufacture of metal articles	109	106,6	110	109	—	107	102	100,1	—	118,4
Mechanical engineering	114	110,8	112	110,5	—	118	108	106,8	—	121,7
Electrical engineering	114	111	111	110	—	114	121	119,8	—	—
Motor vehicles	118,5	117,3	120	120	—	130	115	117,4	—	147,1
Other means of transport	95	97,7	100	100	—	119	97	92,4	—	93,3
Building/civil engineering	116	115,3	100	100	—	93	104	104,4	—	103,7

(1) *Source:* national steel users' associations.

(2) For each country:
first column, activity indicator second half 1995 (second half 1993 = 100)
second column, activity indicator 1995 (1993 = 100).

TABLE 3

Changes in the numbers employed in the steel industry

(including apprentices)

Member State	Number of employees (in '000)		Change (%)
	(Reference month)	(Most recent month) (1)	
Belgium	24,1 (December 1993)	23,5 (December 1994)	− 2,5
Denmark	1,1 (January 1994)	1,1 (January 1995)	− 0,0
Germany	105,2 (January 1994)	94,4 (January 1995)	− 10,3
Greece	2,9 (December 1993)	2,5 (December 1994)	− 13,8
Spain	27,3 (December 1993)	25,8 (December 1994)	− 5,5
France	40,8 (October 1993)	39,9 (October 1994)	− 2,2
Ireland	0,6 (January 1994)	0,4 (January 1995)	− 33,3
Italy	50,2 (August 1993)	45,6 (August 1994)	− 9,2
Luxembourg	7,1 (December 1993)	6,7 (December 1994)	− 5,6
The Netherlands	13,5 (December 1993)	12,8 (December 1994)	− 5,2
Portugal	3,1 (October 1993)	2,8 (October 1994)	− 9,7
United Kingdom	39,7 (November 1993)	38,2 (November 1994)	− 3,8
European Union			− 9,3 (2)

Source: Eurostat.

(1) Most recent figures available.

(2) As the reference period is not the same for all countries, this average is only indicative.

Prior notification of a concentration

(Case No IV/M.620 — Thomson-CSF/Teneo/Indra)

(95/C 194/03)

(Text with EEA relevance)

1. On 19 July 1995, the Commission received a notification of a proposed concentration pursuant to Article 4 of Council Regulation (EEC) No 4064/89 (1) by which the undertakings Thomson-CSF belonging to the group Thomson and Teneo acquire within the meaning of Article 3 (1) (b) of Regulation (EEC) No 4064/89 joint control of the undertaking Indra Sistemas SA (Indra) by way of purchase of shares and contract.

2. The business activities of the undertakings concerned are:

— Thomson-CSF: professional electronics and defence systems,

— Indra: defence and dual technologies, consulting computer services, controls, communication and space electronics,

— Teneo: electric power, air transport, aerospace, engineering, professional electronics and aluminium.

3. Upon preliminary examination, the Commission finds that the notified concentration could fall within the scope of Regulation (EEC) No 4064/89. However, the final decision on this point is reserved.

4. The Commission invites interested third parties to submit their possible observations on the proposed operation to the Commission.

Observations must reach the Commission not later than 10 days following the date of this publication. Observations can be sent by telefax (fax No (32-2) 296 43 01) or by post, under reference No IV/M.620 — Thomson-CSF/Teneo/Indra, to the following address:

Commission of the European Communities,
Directorate-General for Competition (DG IV),
Merger Task Force,
Avenue de Cortenberg/Kortenberglaan 150,
B-1049 Brussels.

(1) OJ No L 395, 30. 12. 1989; corrigendum: OJ No L 257, 21. 9. 1990, p. 13.

III

(Notices)

COMMISSION

Notice of invitation to tender for the reduction in the import duty on sorghum, imported from non-member countries

(95/C 194/04)

I. Subject

1. Notice is hereby given of an invitation to tender for the reduction in the duty on imports from non-member countries of sorghum falling within subheading 100 700 90 of the combined nomenclature.

2. The total quantity in respect of which the reduction in the import duty may be fixed is 120 000 tonnes.

3. Contracts will be awarded in accordance with the provisions of Commission Regulation (EC) No 1840/95 of 26 July 1995 (1).

II. Time limits

1. The period for submission of tenders for the first weekly invitation begins on 18 August 1995 and expires on 24 August 1995 at 10 a.m.

2. The period for submission of tenders for subsequent weekly invitations begins on the Friday of each week and expires on the following Thursday at 10 a.m.

   This notice is published only in respect of the issue of this invitation to tender. Unless amended or replaced, this notice is valid for all weekly invitations issued during the period of validity of this invitation to tender.

III. Tenders

1. Tenders must be submitted in writing and must either be delivered personally against a receipt or be sent by registered letter, telex, telefax or telegram, arriving no later than the date and time stated in Title II, to the following address:

   — Servicio Nacional de Productos Agrarios (SENPA), C/Beneficiencia 8, E-28004 Madrid (telex: 41819, 23427 SENPA E; telefax: 5219832, 5224387).

   Tenders not submitted by telex, telefax or telegram must be enclosed in a sealed envelope marked 'Tender for the reduction in the import duty on sorghum — Regulation (EC) No 1840/95'. This envelope must itself be enclosed in another sealed envelope bearing the address in question.

   Tenders submitted shall remain firm until the Member State concerned informs the interested party that his tender has been successful.

2. The tender and the proof and declaration referred to in Article 6 (3) of Regulation (EC) No 1840/95 shall be written in the official language, or one of the official languages, of the Member State whose competent authority has received the tender.

IV. Tendering security

The tendering security shall be made payable to the competent authority.

V. Award of the contract

The award of the contract shall establish:

(a) the successful tenderer's entitlement to be issued, in the Member State in which the tender was submitted, with an import licence stating the reduction in the import duty mentioned in the tender and awarded in respect of the quantity in question;

(b) the successful tenderer's obligation to apply, in the Member State referred to in (a), for an import licence for that quantity.

(1) OJ No L 177, 28. 7. 1995, p. 5.

Notice of invitation to tender for the reduction in the import duty on maize imported from non-member countries

(95/C 194/05)

I. Subject

1. Notice is hereby given of an invitation to tender for the reduction in the duty on imports from non-member countries of maize falling within subheading 1005 90 00 of the combined nomenclature.

2. The total quantity in respect of which the reduction in the import duty may be fixed is 700 000 tonnes.

3. Contracts will be awarded in accordance with the provisions of Commission Regulation (EC) No 1841/95 of 26 July 1995 (1).

II. Time limits

1. The period for submission of tenders for the first weekly invitation begins on 18 August 1995 and expires on 24 August 1995 at 10 a.m.

2. The period for submission of tenders for subsequent weekly invitations begins on the Friday of each week and expires on the following Thursday at 10 a.m.

   This notice is published only in respect of the issue of this invitation to tender. Unless amended or replaced, this notice is valid for all weekly invitations issued during the period of validity of this invitation to tender.

III. Tenders

1. Tenders must be submitted in writing and must either be delivered personally against a receipt or be sent by registered letter, telex, telefax or telegram, arriving no later than the date and time stated in Title II, to the following address:

   — Servicio Nacional de Productos Agrarios (SENPA), C/Beneficiencia 8, E-28004 Madrid (telex: 41819, 23427 SENPA E; telefax: 5219832, 5224387).

   Tenders not submitted by telex, telefax or telegram must be enclosed in a sealed envelope marked 'Tender for the reduction in the import duty on maize — Regulation (EC) No 1841/95'. This envelope must itself be enclosed in another sealed envelope bearing the address in question.

   Tenders submitted shall remain firm until the Member State concerned informs the interested party that his tender has been successful.

2. The tender and the proof and declaration referred to in Article 6 (3) of Regulation (EC) No 1841/95 shall be written in the official language, or one of the official languages, of the Member State whose competent authority has received the tender.

IV. Tendering security

The tendering security shall be made payable to the competent authority.

V. Award of the contract

The award of the contract shall establish:

(a) the successful tenderer's entitlement to be issued, in the Member State in which the tender was submitted, with an import licence stating the reduction in the import duty mentioned in the tender and awarded in respect of the quantity in question;

(b) the successful tenderer's obligation to apply, in the Member State referred to in (a), for an import licence for that quantity.

(1) OJ No L 177, 28. 7. 1995.

Notice of an open competition

(95/C 194/06)

The European Commission is organizing the following open competitions (1):

— COM/LA/937 and COM/LA/939: Finnish language interpreters

— COM/LA/940 and COM/LA/941: Swedish language interpreters

(1) OJ No C 194 A, 28. 7. 1995.

Phare — construction works

Notice of invitation to tender issued by the Government of Romania for works financed by the European Community in the framework of the Phare programme

(95/C 194/07)

Title

The improvement of the National Road 7 (DN 7) between 590 + 000 km and 594 + 100 km in 2 separate lots (1.1 & 2) and building works for the improvement of Nadlac border crossing point in 1 lot (1.2).

1. Participation

Participation is open on equal terms to all natural and legal persons of the Member States and Albania, Poland, Hungary, Romania, Bulgaria, the Czech Republic, the Slovak Republic, Slovenia, Lithuania, Latvia and Estonia.

2. Subject

Road and building works within Nadlac border crossing point. The works include the following main quantities.

Road works: lot 1.1, lot 2

earth excavation: 4 944 m^3, 1 776 m^3,

earth filling: 2 700 m^3, - ,

ballast layer: 2 077 m^3, 648 m^3,

stabilized ballast: 1 838 m^3, 400 m^3,

chipping binder: 2 834 t, 6 911 t,

mixture: 1 204 t, - ,

asphalt concrete 4 cm: 13 244 m^2, 30 200 m^2,

ditches: -, 3 100 m,

parapets: 1 500 m, 250 m.

Building works: lot 1.2.

area: 300 m^2,

earthworks: 621 m^3,

clerks' cabins: 4 units,

truck selection sensors: 4 units,

light and power supply: 2 units,

telecommunications instal.: 4 units.

3. Invitation to tender dossier:

The complete tender dossier may be obtained from 18. 7. 1995 at National Administration of Roads, blvd. Dinicu Golescu 38, RO-77113 Bucuresti, Mr Danila Busca, Director-General, tel./facsimile (401) 222 71 29, against proof of payment of 400 USD in the name of the National Administration of Roads.

4. Tender:

Tenders, accompanied by a tender bond in the amount of not less than 2 % of the tender price, shall be received not later than 15. 9. 1995 (15.00), local time, at the National Administration of Roads, blvd Dinicu Golescu 38, RO-77113 Bucuresti. The tenders will be opened in public session on 18. 9. 1995 (10.00), local time, at the 'National Administration of Roads'.

Phare — computer equipment

Notice of invitation to tender issued by the European Commission on behalf of the Phare programme

RO 9403

(95/C 194/08)

Programme title

Upgrading the statistical information system of Romania.

1. **Participation and origin**

Participation is open on equal terms to all natural and legal persons of the Member States of the European Union, or of the beneficiary countries of the Phare programme, Albania, Bulgaria, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.

2. **Subject**

Supply, in 5 lots, of: computer equipment, software, and accessories, including installation, support and training, to the National Commission for Statistics in Bucharest.

Lot 1: district LAN configurations,

lot 2: laptops,

lot 3: digital printing equipment, copiers and office equipment,

lot 4: central configuration extension and upgrading,

lot 5: development support and system integration.

3. **Invitation to tender dossier**

The complete tender dossier may be obtained free of charge from:

a) The European Commission, Directorate-General for External Political Relations, for the attention of Mr Peter Wragg (SC29 - 2/49), rue de la Loi/Wetstraat 200, B-1049 Bruxelles/Brussel, facsimile (32-2) 299 16 66

b) The Romanian National Commission for Statistics, for the attention of Mr Alexandru Radocea, 16 Bulevardul Libertatii, RO-Bucharest

c) Offices of the European Commission in the Community:

D-53113 Bonn, Zitelmannstraße 22 [Tel. (49-228) 53 00 90; Telefax (49-228) 530 09 50]

NL-2594 AG Den Haag, EVD, afdeling PPA, Bezuidenhoutseweg 151, [tel. (31-70) 379 88 11; telefax (31-70) 379 78 78]

UK-London SW1P 3AT, Jean Monnet House, 8 Storey's Gate [tel. (44-71) 222 81 22; facsimile (44-71) 222 09 00/81 20]

L-2920 Luxembourg, bâtiment Jean Monnet, rue Alcide de Gasperi [tél. (352) 430 11; télécopieur (352) 43 01 44 33]

F-75007 Paris Cedex 16, 288, boulevard Saint-Germain [tél. (33-1) 40 63 40 99; télécopieur (33-1) 45 56 94 17]

I-00187 Roma, via Poli 29 [tel. (39-6) 678 97 22; telefax (39-6) 679 16 58]

DK-1004 København K, Højbrohus, Østergade 61, [tlf. (45-33) 14 41 40; telefax (45-33) 112 03]

IRL-Dublin 2, 39 Molesworth Street [tel. (353-1) 671 22 44; facsimile (353-1) 671 26 57]

GR-10674 Athens, Vassilissis Sofias 2, [τηλ. (30-1) 724 39 82/83/84, τελεφάξ (30-1) 724 46 20]

E-28001 Madrid, calle Serrano, 41, 5a planta [tel. (34-1) 435 17 00/15 28; telefax (34-1) 576 03 87/577 29 23]

P-1200 Lisboa, Centro Europeu Jean Monnet, Largo Jean Monnet 1-10º [tel. (351-1) 154 11 44; telefax (351-1) 155 43 97]

A-1040 Wien, Hoyosgasse 5, [tel. (43-1) 505 33 79, 505 34 91; telefax (43-1) 50 53 37 97]

FIN-00131 Helsinki, Pohoisesplanadi 31, PO Box 234, [tel. (358-0) 65 64 20; telefax (358-2) 65 67 80]

S-11147 Stockholm, Hamngatan 6, [tel. (46-8) 611 11 72; telefax (46-8) 611 44 35]

4. **Tenders**

Should arrive, at the latest, on 18. 9. 1995 (10.00), local time, at:

The Romanian National Commission for Statistics, for the attention of Mr Alexandru Radocea, 16 Bulevardul Libertatii, RO-Bucharest

They will be opened on 18. 9. 1995 (12.00), local time, at:

The Romanian National Commission for Statistics, for the attention of Mr Alexandru Radocea, 16 Bulevardul Libertatii, RO-Bucharest