

Air transport recovers in 2010

Remains vulnerable to unforeseen events

Following the economic crisis which began in 2008 and the first positive signs at the end of 2009, 2010 confirmed the recovery of the air transport industry: between 2009 and 2010, the total number of passengers travelling by air in the European Union increased by 3.4% to 777 million.

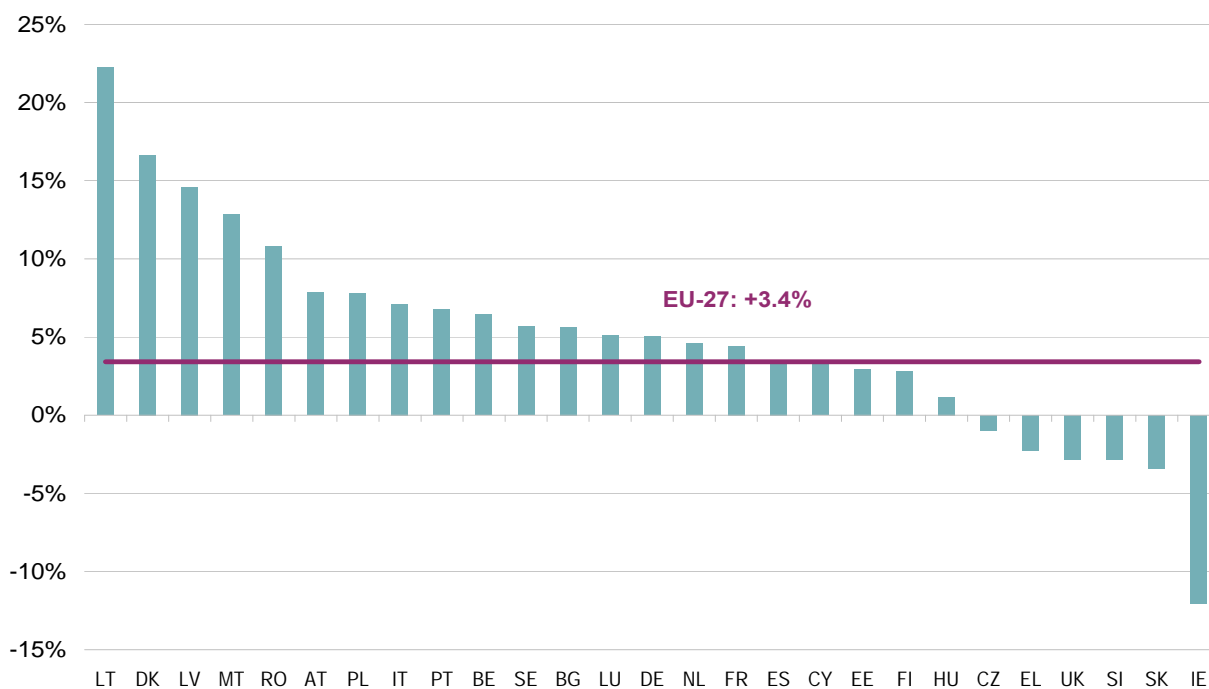
Figure 1 shows the total growth of air passengers by Member State between 2009 and 2010. The stand-out feature is the 12.1% fall registered for Ireland. 2010 was difficult for Ireland; the slowdown of the economy had a

negative impact on the number of passengers.

The air transport industry remains vulnerable to unforeseen events, like extreme weather conditions in the autumn and the eruption of the Icelandic volcano in spring 2010, which led to a major, if temporary, fall in air transport throughout the EU, as Figure 2 shows.

In 2010, London/Heathrow remained the largest EU-27 airport in terms of passenger transport. Frankfurt/Main continued to be the main European airport for freight and mail.

Figure 1: 2009/2010 growth in total passenger air transport by Member State (in %)



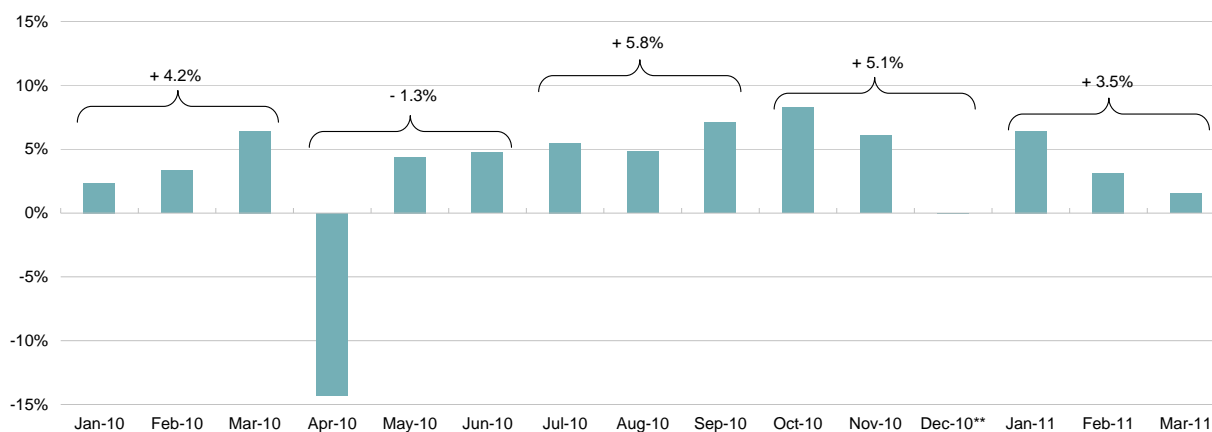
Source: Eurostat (online data code: [AVIA_PAOC](#))

Events affecting air transport

Figure 2 shows the monthly growth in air passenger transport for 2010 and the first quarter of 2011 in the EU-27. It underlines the negative effect that unforeseen events can have on the air transport industry. The second quarter of 2010 is the only

period showing negative growth compared with the other quarters presented. This is entirely to do with the problems caused by the Icelandic volcanic eruption, which caused major disruption to air transport in April 2010.

Figure 2: EU-27 monthly growth in air passenger transport, 2009/2010 and 2010/2011*



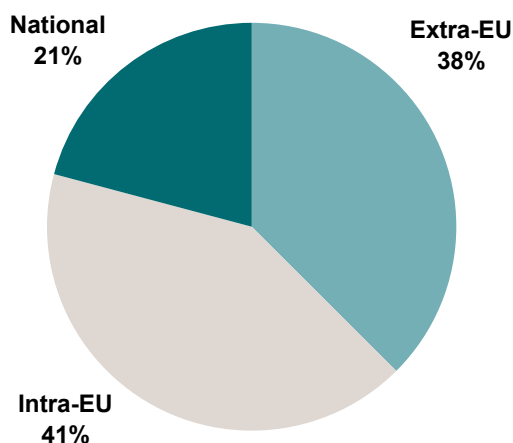
* 2010/2011 changes are based on the selection of countries for which 2011 data are available.

** The 2010/2011 growth for December is close to 0 (-0.03%) and is not visible on the graph.

Source: Eurostat (online data code: [AVIA_PAOC](#))

Air passenger transport on the increase

Figure 3: Overview of EU-27 air passenger transport in 2010



Source: Eurostat (online data code: [AVIA_PAOC](#))

Figure 3 indicates that the intra-EU share of international transport decreased slightly to 41% in 2010 (against 42% in 2009). Domestic passenger transport decreased by 1 percentage point over the same period. By contrast, the share of extra-EU passengers increased: the 7.4% growth between 2009 and 2010 shown in Table 2 for extra-EU 27 transport confirms this growing trend.

Table 1: Intra-EU traffic at country level: top-10 country pairs represent 42% of 2010 intra-EU traffic*

Rank	Country pairs	2009		2010	
		Passengers carried (in 1000)	Share in total intra-EU (%)	Passengers carried (in 1000)	Share in total intra-EU (%)
1	United Kingdom - Spain	30 551	10.1	28 826	9.4
2	Spain - Germany	20 391	6.7	21 089	6.9
3	United Kingdom - Germany	10 709	3.5	11 166	3.6
4	Italy - Spain	9 695	3.2	10 648	3.5
5	Italy - Germany	10 414	3.4	10 597	3.4
6	United Kingdom - France	10 965	3.6	10 094	3.3
7	United Kingdom - Italy	9 936	3.3	9 621	3.1
8	United Kingdom - Ireland	10 914	3.6	9 575	3.1
9	France - Spain	7 608	2.5	8 488	2.8
10	Italy - France	7 893	2.6	8 239	2.7

* See methodological notes

Source: Eurostat (online data code: [AVIA_PAOC](#))

International intra-EU traffic at country level, as set out in Table 1, shows that for 2010, the top ten country-to-country flows in general remained stable compared with 2009.

One noteworthy feature is that, with one exception, all the country pairs that include the United Kingdom show a decrease between 2009 and 2010.

Table 2: Overview of EU-27 air passenger transport by Member States in 2010: passengers carried (in 1000)

		Total transport		National transport		International intra-EU-27 transport		International extra-EU-27 transport	
		Number of passengers	Growth (%) 2009-2010	Number of passengers	Growth (%) 2009-2010	Number of passengers	Growth (%) 2009-2010	Number of passengers	Growth (%) 2009-2010
EU-27 *		776 753	3.4	162 589	0.2	322 835	1.7	291 329	7.4
BELGIUM	BE	22 691	6.5	56	-3.3	15 334	4.8	7 300	10.2
BULGARIA	BG	6 168	5.6	183	7.0	4 630	2.3	1 355	18.7
CZECH REPUBLIC	CZ	12 242	-1.0	206	-20.3	8 408	-2.8	3 628	4.8
DENMARK	DK	24 331	16.6	2 401	27.8	15 439	15.6	6 491	15.4
GERMANY	DE	166 131	5.0	24 164	1.8	82 970	3.4	58 996	8.9
ESTONIA	EE	1 381	3.0	25	11.0	1 087	4.7	270	-3.9
IRELAND	IE	23 094	-12.1	360	-42.7	19 964	-11.9	2 770	-7.0
GREECE	EL	32 132	-2.3	6 297	-8.6	20 915	-3.4	4 920	13.0
SPAIN	ES	153 387	3.4	38 227	1.7	93 583	2.0	21 577	13.6
FRANCE	FR	122 770	4.4	25 872	-0.5	51 410	5.4	45 487	6.3
ITALY	IT	109 065	7.1	29 940	5.3	57 926	6.1	21 199	12.7
CYPRUS	CY	6 948	3.2	0.0	-68.5	5 506	-0.4	1 441	19.9
LATVIA	LV	4 656	14.6	0.3	-13.3	3 395	9.1	1 261	32.7
LITHUANIA	LT	2 283	22.3	0.2	65.4	1 934	26.3	349	3.7
LUXEMBOURG	LU	1 614	5.1	0.8	67.5	1 267	5.2	346	4.7
HUNGARY	HU	8 175	1.2	-	-	6 267	0.9	1 908	2.0
MALTA	MT	3 294	12.8	0.0	0.0	2 969	11.2	324	31.1
NETHERLANDS	NL	48 616	4.6	3	16.5	27 812	3.4	20 801	6.2
AUSTRIA	AT	23 532	7.9	762	10.4	15 518	6.9	7 252	9.7
POLAND	PL	18 383	7.8	942	9.3	13 332	6.2	4 109	13.2
PORTUGAL	PT	25 732	6.8	3 011	0.2	17 779	6.0	4 942	14.1
ROMANIA	RO	8 849	10.8	746	19.4	6 919	9.4	1 184	14.3
SLOVENIA	SI	1 382	-2.9	0.1	15.3	773	-5.2	609	0.3
SLOVAKIA	SK	1 882	-3.4	42	-60.1	1 504	0.0	336	-1.1
FINLAND	FI	14 221	2.8	2 250	-6.3	8 892	4.0	3 079	7.0
SWEDEN	SE	26 647	5.7	6 121	2.6	15 587	5.1	4 940	11.6
UNITED KINGDOM	UK	192 885	-2.8	20 980	-8.4	107 451	-4.0	64 454	1.1

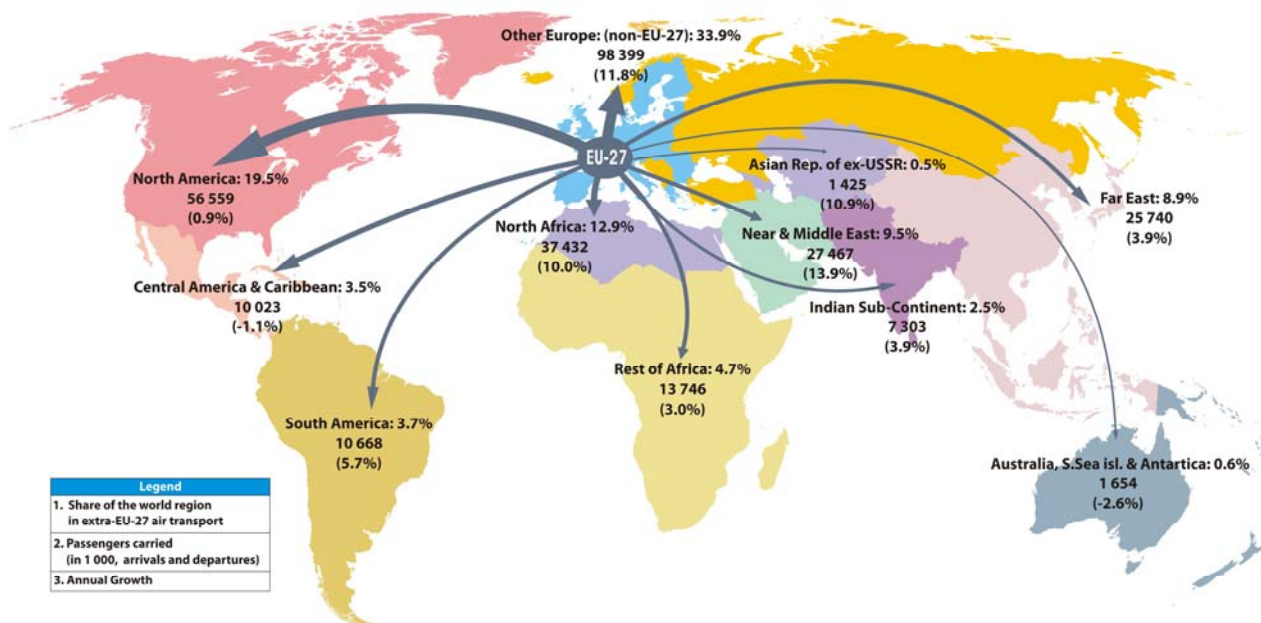
* Double counting is excluded in the intra-EU-27 and total EU-27 aggregates by taking into consideration only departure declarations.

Source: Eurostat (online data code: [AVIA_PAOC](#))

Map 1 gives an overall picture of the extra-EU market. With 13.9% growth between 2009 and 2010, 'Near and Middle East' is the partner

world region with the highest increase for EU passenger transport.

Map 1: Extra-EU-27 transport of passengers in 2010



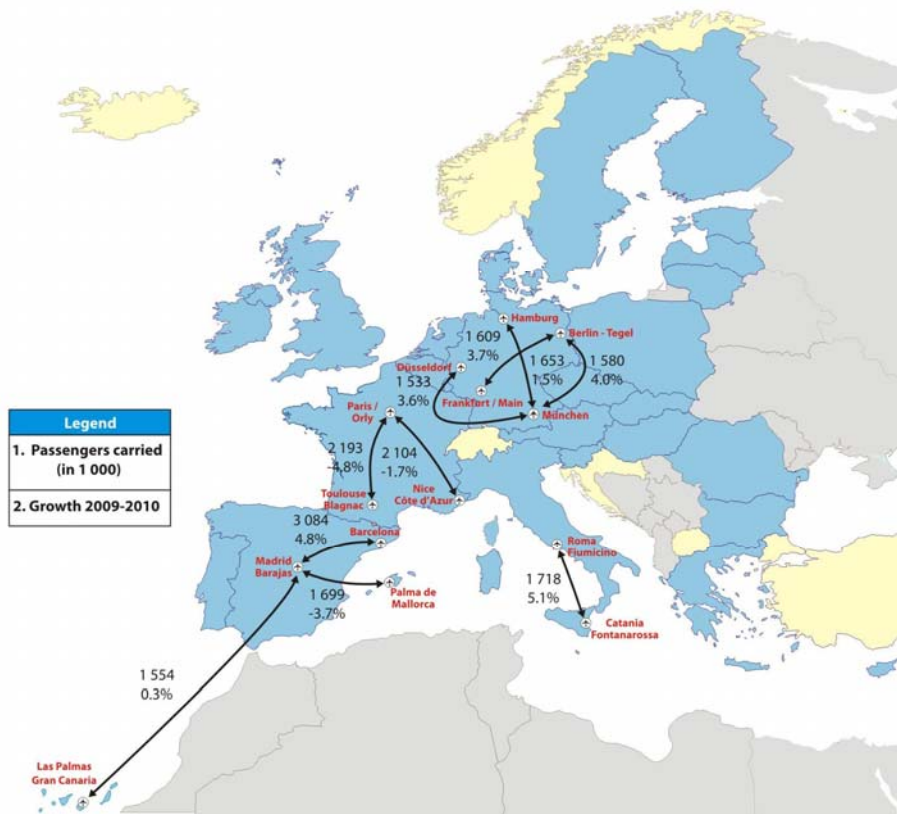
Source: Eurostat (online data code: [AVIA_PAOC](#))

Table 3: Top airports in the EU-27 in terms of total passengers carried in 2010

Rank	Country	Airport	Total air transport (in 1000 passengers)	of which			Growth of total air transport 2009-2010 (%)	Total number of passenger flights (in 1000)	Growth of total number of flights 2009-2010 (%)
				National air transport	International intra-EU-27 air transport	International extra-EU-27 air transport			
1	UK	LONDON/HEATHROW	65 742	4 841	21 917	38 984	-0.2	447	-2.3
2	FR	PARIS/CHARLES DE GAULLE	57 952	5 205	23 274	29 473	0.5	458	-7.9
3	DE	FRANKFURT/MAIN	52 646	6 232	19 299	27 114	4.1	433	-0.2
4	ES	MADRID/BARAJAS	49 797	18 764	18 399	12 635	3.9	417	-0.2
5	NL	AMSTERDAM/SCHIPHOL	45 146	0	24 643	20 503	3.7	376	-1.9
6	IT	ROMA/FIUMICINO	35 954	12 667	13 598	9 690	7.6	324	2.0
7	DE	MÜNCHEN	34 517	9 258	15 024	10 235	6.0	364	-2.3
8	UK	LONDON/GATWICK	31 341	3 496	18 187	9 658	-3.1	233	-4.9
9	ES	BARCELONA	29 181	11 635	13 236	4 310	6.9	262	-0.4
10	FR	PARIS/ORLY	25 158	13 332	6 057	5 770	0.3	216	-3.5
11	DK	KØBENHAVN/KASTRUP	21 386	2 311	13 182	5 894	9.1	237	5.1
12	ES	PALMA DE MALLORCA	21 079	6 199	13 908	972	-0.4	161	-2.0
13	AT	WIEN/SCHWECHAT	19 617	747	12 254	6 616	8.7	238	0.8
14	DE	DÜSSELDORF	18 908	4 393	8 744	5 771	6.7	207	0.5
15	IT	MILANO/MALPENSA	18 713	3 663	9 254	5 797	7.9	180	3.3
16	UK	LONDON/STANSTED	18 563	1 724	15 492	1 347	-7.0	133	-8.7
17	IE	DUBLIN	18 408	359	15 701	2 348	-10.1	153	-8.0
18	UK	MANCHESTER	17 662	2 238	9 415	6 010	-5.2	147	-8.4
19	BE	BRUXELLES/NATIONAL	16 980	5	10 531	6 445	1.2	194	-3.1
20	SE	STOCKHOLM/ARLANDA	16 957	4 016	8 887	4 054	5.6	178	-0.3
21	EL	ATHINAI	15 303	5 525	7 187	2 591	-5.2	175	-9.6
22	DE	BERLIN/TEGEL	14 966	6 739	5 689	2 537	5.9	149	2.0
23	PT	LISBOA	14 050	2 130	8 036	3 883	5.9	134	4.0
24	DE	HAMBURG	12 884	5 592	4 958	2 334	5.8	138	0.8
25	FI	HELSINKI/VANTAA	12 861	2 203	7 661	2 997	2.1	162	-0.6
26	ES	MALAGA	12 023	2 557	8 725	740	3.6	97	2.8
27	CZ	PRAHA/RUZYNE	11 514	109	8 093	3 313	-0.8	146	-5.0
28	DE	KÖLN/BONN	9 786	3 522	4 394	1 869	0.9	98	0.2
29	FR	NICE/CÔTE D'AZUR	9 588	3 862	4 065	1 661	-2.3	144	-3.9
30	ES	ALICANTE	9 368	2 055	6 556	757	2.8	71	0.8
34	PL	WARSZAWA/OKECIE	8 728	925	5 457	2 345	4.7	125	1.7
38	HU	BUDAPEST/FERIHEGY	8 175	-	6 267	1 908	1.2	94	-5.0
51	CY	LARNAKA	5 354	0	4 037	1 316	3.8	49	-1.7
58	RO	BUCUREȘTI/OTOPENI	4 917	601	3 386	929	9.7	71	3.8
63	LV	RIGA	4 656	0	3 395	1 261	14.6	66	15.4
84	MT	LUQA	3 294	0	2 969	324	12.8	29	8.9
85	BG	SOFIA	3 278	172	2 701	404	5.2	38	1.5
120	SK	BRATISLAVA/IVANKA	1 658	42	1 344	272	-2.5	17	-12.3
123	LU	LUXEMBOURG	1 614	1	1 267	346	5.1	36	0.0
136	SI	LJUBLJANA/JOŽE PUČNIK	1 382	0	773	609	-2.9	30	-11.1
137	EE	TALLINN/ÜLEMISTE	1 381	25	1 087	270	3.0	25	3.9
138	LT	VILNIUS	1 370	0	1 061	309	5.0	23	17.4

Source: Eurostat (online data code: [AVIA_PAQA](#))

Map 2: Top ten airport pairs within the EU-27 in 2010



Source: Eurostat (online data code: [AVIA_PAR](#))

Table 3 shows that London Heathrow still predominates among EU-27 airports, with the highest total of passengers transported by air.

Although for most of the listed airports, total passenger numbers increased in 2010 compared with 2009, there were decreases of between 5 % and 10 % for Dublin (IE), London/Stansted

(UK), Manchester (UK) and Athens (EL).

Map 2 presents the top ten airport pairs within the EU-27. It is worth noting that all the routes are domestic ones. The route between Madrid and Barcelona shows an increase of 4.8 % in 2010.

Air freight and mail transport: confirmed recovery

The growing importance of the international extra-EU-27 transport segment is reflected in air freight and mail transport figures at EU level, with substantial growth of 19.5 % in 2010 compared with 2009. In contrast, international intra-EU-27 freight and mail transport recorded a moderate increase of 5.7 % over the same period.

The impressive rise, observed in Table 4, in international extra-EU transport of freight and mail for Lithuania and Slovakia is due to the strong development of Kaunas airport and the new airline companies operating at Bratislava airport in 2010.

Table 4: Overview of EU-27 air freight and mail transport by Member States in 2010: freight and mail carried (in tonnes)

	Total transport		National transport		International intra-EU-27 transport		International extra-EU-27 transport		
	Volume of freight and mail	Growth 2009-2010 (%)	Volume of freight and mail	Growth 2009-2010 (%)	Volume of freight and mail	Growth 2009-2010 (%)	Volume of freight and mail	Growth 2009-2010 (%)	
EU-27⁽¹⁾	13 137 832	16.1	582 157	-2.3	1 938 966	5.7	10 616 709	19.5	
BELGIUM	BE	973 776	16.4	870	11.0	308 757	21.0	664 149	14.4
BULGARIA	BG	21 110	21.0	32	19.7	12 206	0.1	8 872	69.6
CZECH REPUBLIC	CZ	65 620	21.7	1 063	-28.5	32 013	24.1	32 544	22.1
DENMARK	DK	160 415	3.2	1 259	-41.1	66 496	0.9	92 660	6.0
GERMANY	DE	4 099 072	22.7	105 953	-3.4	884 511	10.7	3 108 608	27.8
ESTONIA	EE	11 886	-42.1	-	-	5 305	15.7	6 581	-58.7
IRELAND	IE	122 231	9.1	5 584	-8.5	74 668	4.4	41 979	22.0
GREECE	EL	86 596	-9.1	11 649	-3.8	47 731	-9.2	27 216	-10.9
SPAIN	ES	592 336	17.9	79 190	-6.3	170 909	12.9	342 237	28.3
FRANCE⁽²⁾	FR	1 583 114	9.5	149 786	1.2	290 551	11.7	1 142 777	10.2
ITALY	IT	838 724	18.8	68 948	13.4	266 034	5.1	503 742	28.5
CYPRUS	CY	37 264	-3.6	0.0	-97.2	29 199	-4.2	8 065	-1.3
LATVIA	LV	11 268	30.3	3	-	7 157	21.0	4 108	50.5
LITHUANIA	LT	9 762	51.0	-	-	6 740	23.3	3 022	202.8
LUXEMBOURG	LU	705 829	12.5	-	-	40 027	-8.2	665 802	14.1
HUNGARY	HU	65 305	20.6	-	-	28 772	17.0	36 533	23.7
MALTA	MT	16 882	-3.5	-	-	11 871	2.9	5 011	-16.0
NETHERLANDS	NL	1 600 381	16.7	0.2	-49.8	46 062	-4.9	1 554 319	17.5
AUSTRIA	AT	236 633	16.8	699	-13.4	50 326	2.6	185 608	21.5
POLAND	PL	61 238	14.4	7 520	-4.5	31 866	10.7	21 852	29.6
PORTUGAL	PT	137 126	9.3	20 383	-5.7	56 602	4.0	60 141	21.6
ROMANIA	RO	24 512	4.4	252	0.4	20 128	4.8	4 132	2.4
SLOVENIA	SI	6 071	8.7	-	-	4 436	16.0	1 635	-7.0
SLOVAKIA	SK	17 835	45.8	-	-	15 428	32.0	2 407	345.7
FINLAND	FI	165 254	30.2	3 156	-14.5	60 218	18.1	101 880	41.1
SWEDEN	SE	186 312	15.5	15 880	-11.6	87 761	14.8	82 671	23.5
UNITED KINGDOM	UK	2 428 996	12.7	109 930	-6.6	410 907	8.2	1 908 159	15.0

⁽¹⁾ Double counting is excluded in the intra-EU-27 and total EU-27 aggregates by taking into consideration only departure declarations.

⁽²⁾ Due to freight and mail data collection difficulties, the data for the two main airports in Paris (Charles de Gaulle and Orly) are underestimated. This also affects the aggregated freight data for France.

Source: Eurostat (online data code: [AVIA GOOC](#))

Table 5: Top 20 airports in the EU-27 in terms of total freight and mail carried in 2010 (in tonnes)

Rank	Country	Airport	Total air transport (in tonnes)	Freight and mail loaded	Freight and mail unloaded	Growth of total freight transport 2009-2010 (%)	Total number of freight flights (in 1000)	Growth of total number of freight flights 2009-2010 (%)
1	DE	FRANKFURT/MAIN	2 270 231	1 093 521	1 176 710	20.6	23	0.2
2	UK	LONDON/HEATHROW	1 551 308	813 722	737 586	15.0	2	-2.4
3	NL	AMSTERDAM/SCHIPHOL	1 538 034	801 280	736 754	16.8	15	-1.5
4	FR	PARIS/CHARLES DE GAULLE*	1 292 521	600 476	692 045	7.5	34	-9.1
5	LU	LUXEMBOURG	705 829	350 885	354 943	12.5	10	-0.7
6	DE	KÖLN/BONN	638 184	308 658	329 526	16.2	22	0.4
7	DE	LEIPZIG/HALLE	637 815	320 642	317 173	25.4	30	3.1
8	BE	LIEGE	508 518	256 090	252 428	26.6	25	7.3
9	IT	MILANO/MALPENSA	432 667	207 772	224 895	25.9	7	4.0
10	ES	MADRID/BARAJAS	400 476	193 263	207 214	21.3	10	-0.1
11	BE	BRUXELLES/NATIONAL	385 029	162 968	222 061	5.7	11	-3.1
12	UK	EAST MIDLANDS	304 049	150 868	153 181	6.1	18	-9.2
13	DE	MÜNCHEN	291 058	134 456	156 602	24.2	4	-2.4
14	AT	WIEN/SCHWECHAT	231 763	149 020	82 743	16.9	5	1.1
15	UK	LONDON/STANSTED	229 812	131 461	98 351	7.7	10	-8.3
16	DE	FRANKFURT/HAHN	164 523	81 451	83 071	56.6	5	-6.5
17	IT	ROMA/FIUMICINO	164 368	73 852	90 516	18.2	3	1.9
18	FI	HELSINKI/VANTAA	157 508	80 839	76 669	29.3	8	1.3
19	DK	KØBENHAVN/KASTRUP	138 088	67 956	70 132	-9.2	4	4.2
20	UK	MANCHESTER	116 559	66 622	49 937	13.2	2	-8.2

* Due to freight and mail data collection difficulties, the data for Paris-Charles de Gaulle are underestimated.

Source: Eurostat (online data code: [AVIA_GOOA](#))

In the EU-27, all the top 20 airports in terms of total freight and mail carried registered an increase between 2009 and 2010, with only one exception.

However, about half of these airports still show a fall in the total number of freight flights between 2009 and 2010.

Air transport in EFTA and candidate countries

For EFTA and candidate countries, there is a clear contrast in the evolution of passenger and freight and mail transport between 2009 and 2010. While all EFTA and candidate countries show clear

recovery for passengers transport (from +4.7% to +20.5%), most countries still faced an annual decline in 2010 in terms of freight and mail transport.

Table 6: Overview of air passenger transport in EFTA and Candidate countries in 2010 (in 1000 passengers and in tonnes)

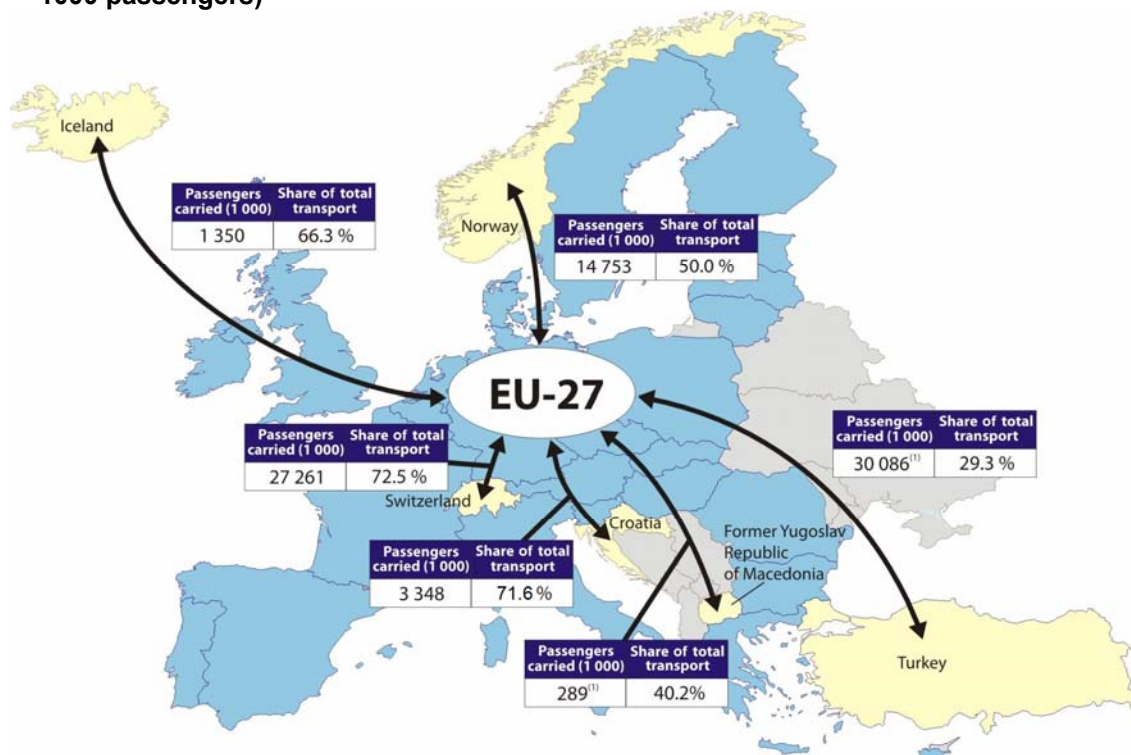
	Passengers carried				Freight and mail loaded/unloaded			
	Total (in 1000)	Growth 2009-2010 (%)	National transport	International transport	Total (in tonnes)	Growth 2009-2010 (%)	National transport	International transport
ICELAND ⁽¹⁾	2 036	10.8	0	2 036	35 234	-9.1	0	35 234
NORWAY	29 517	6.7	12 956	16 561	49 092	-3.7	7 540	41 552
SWITZERLAND	37 616	4.7	679	36 936	375 177	18.8	4 875	370 302
CROATIA	4 677	7.9	432	4 245	7 441	-14.7	994	6 447
FYR of Macedonia ⁽²⁾	720	14.1	:	:	2 175	-0.8	:	:
TURKEY ⁽²⁾	102 800	20.5	:	:	559 628	27.6	:	:

⁽¹⁾ Data concern only Keflavik airport

⁽²⁾ Total based on the addition of airport declarations

Source: Eurostat (online data codes: [AVIA_PAOC](#), [AVIA_GOOC](#))

Map 3: Air passenger transport flows between EFTA/Candidate countries and the EU-27 in 2010 (in 1000 passengers)



⁽¹⁾ The volume of passengers carried to/from EU-27 is estimated from EU-27 declarations.

Source: Eurostat (online data code: [AVIA PAOC](#))

METHODOLOGICAL NOTES

Data sources

All figures presented in this publication have been extracted from the Eurostat aviation database. The database is available online from the Eurostat web page.

Main Definitions

The definitions used for air transport statistics are included in the [Commission Regulation \(EC\) 1358/2003](#) implementing [Regulation \(EC\) 437/2003](#) of the European Parliament and of the Council on statistical returns in respect of the carriage of passengers, freight and mail by air. The main definitions are:

On Flight Origin and Destination (OFOD): traffic on a commercial air service identified by a unique flight number subdivided by airport pairs in accordance with the point of embarkation and point of disembarkation on that flight. This is linked to the definition of passengers carried.

Passengers carried: all passengers on a particular flight counted once only and not repeatedly on each individual stage of that flight. This excludes direct transit passengers.

Freight and mail loaded/unloaded: all freight and mail loaded onto or unloaded from an aircraft. This excludes direct transit freight and mail. In principle, information provided in this publication is based on On Flight Origin/Destination (OFOD) data. Only when OFOD data have not been reported have airport declarations been used.

Airport coverage

In principle, this publication covers air transport to and from any airports in the reporting countries with more than 150 000 passengers annually.

Notes on some Reporting Countries

France: due to freight and mail data collection difficulties, the freight data for the two main airports in Paris (Charles de Gaulle and Orly) are underestimated. This also affects the aggregated freight and mail data for France.

Turkey: only provides airport declarations (Dataset C1).

Iceland: only data for Keflavik airport are available for OFOD declarations.

Former Yugoslav Republic of Macedonia: only provides airport declarations (Dataset C1).

Double counting

The national aggregates and total intra-EU-27 aggregates exclude any double counting.

Table 1

For this particular table, the figures (and related shares) for the countries flows have been calculated by adding the "Departures" declarations of the two countries concerned.

Map 1

The component countries comprising the world regions as defined for this map are based on the geonomenclature used by Eurostat for external trade statistics. The components of each world region can be extracted from the Aviation domain of the Eurostat on-line database or obtained upon request.

Some care should be taken in drawing conclusions as regards world regional shares due to the fact that passengers who either stop-over or change planes en-route will be allocated to the country in which they made their connections and not to the country of first origin or final destination.

Map 2

The total figures for each pair of airports have been calculated by adding together the 'Departures' declarations of the two airports concerned.

Map 3

The share of total transport represents, for each candidate country and each EFTA country, the share of total transport to/from EU countries. As indicated under the maps, transport to/from EU countries is sometimes estimated on the basis of mirror EU declarations.

In this publication

':' means 'not available'

'-' means 'not applicable'

'0' means 'less than half the unit used'

This publication was prepared with the assistance of Mathieu Erzar and Julien Tardivon (data).

Further information

Eurostat Website: <http://ec.europa.eu/eurostat>

Data on 'Transport statistics'

<http://epp.eurostat.ec.europa.eu/portal/page/portal/transport/data/database>

Select 'Air transport'

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