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27 November 1979

EUROPEAN COUNCIL, DUBLIN

29/30 NOVEMBER 1979

EUROPE IN 1990 AND "TELEMATICS"

Brief by the Foreign and Commonwealth Office

OBJECTIVE

1. To agree that Community should focus on "telematics".

POINTS TO MAKE

2. Agree that information technology is a vital industry. We share the Commission's concern that Community industries should be helped to face the 80s. Glad that a proper balance will be struck between national and Community activities. Important however that any proposals which might result from the Commission's initiative should take account of political, industrial and social practicalities and the resources available. Accordingly agree to participate actively in more detailed discussions with the Commission.
3. Doubtful about value of interventionist approach of "Europe in the 1990s". Much of its analysis questionable. Too general. Remain to be convinced of the need for such intervention.

/BACKGROUND

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References:

- A : Commission paper on "Structural changes in the 1980s" (COM(79)323 Final)
- B : Commission paper on European Society and the Data Technologies (COM(79)683 Final)

4. The electronics industry in the 1980s will be concerned primarily with information technology: telematics is the shorthand for the increasing convergence of computer and telecommunications technology. It embraces the major sectors of the electronics industry including computers (information generation, processing, storage and retrieval) and communications (transmission and distribution) and is a major growth industry. Its application extends to office automation, electronic mail, electronic fund transfer, satellite communications and the provision of data-base services.

5. At Dublin the Commission is expected to press for a high level political commitment for a Community policy on telematics. They argue that one is needed to act as a catalyst for the broader development of the infrastructure of supply and distribution industries in the telematics sector (components, computers, telecommunications, data processing etc); and as a means of preparing management and workforces throughout the Community for the new economic and social investment which these technical investment will engender.

6. No detailed proposals will be made at Dublin. Instead the Commission will seek agreement that action in this area is needed and that a strategic concept should be developed. They argue that:

- (a) this is an important activity for Europe and something needs to be done to co-ordinate national efforts.

(b) The Commission has an interest in the establishment of norms and standards in the infrastructure industries, in the educational, training and employment aspects of the impact of the new technology, and in the non-tariff barriers (fiscal, copyright and language) to the development of the market and should seek to pull these interests together.

(c) That the Commission should work up a detailed programme of action with the aim of reporting back to the next Summit.

7. (Not for disclosure). The Commission seem unlikely to propose measures which will require significant further Community resources; instead they will be relying largely on the continuation or expansion of existing national programmes. This approach is likely to benefit those nations - especially the French - which are already committing large sums of Government money to the development of their information industries and which may seek to impose their national standards as European norms. For the Commission initiative to benefit the UK industrially, a more concentrated and probably increased commitment to our national industrial support measures in this sector will be required, coupled to a determination to influence the Commission's attitude.

8. The Commission have asked that their Report, submitted to the Strasbourg European Council in June, on structural development prospects until 1990 should be discussed further. Analysis of labour supply trends helpful, and a number of useful points, eg. the need to increase public awareness of the implications of new technology, have been incorporated in the telematics paper. In general, however, approach gives insufficient consideration to the role of the market in bringing about structural change. However, telematics is likely to be the main feature of discussion of this issue at Dublin.

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● EHC(D)(79) 8

REF A

COM(79) 323 final
Bruxelles, le 14 June 1979

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Secretariat général

STRUCTURAL CHANGES IN THE 1980s

(Communication to the European Council - Strasbourg,
21 and 22 June 1979)

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I. STRUCTURAL CHANGE IN THE 1980s

Structural change in the 1980s will be determined by Europe's ability to loosen the constraints resulting from the energy shortage and to cope with the corresponding excessive outside dependence.

By 1990, the Community's energy consumption will probably have increased by at least half as much as that in 1979, assuming average growth. It is true that alternative energy sources should, if present predictions prove well-founded, account for a larger share of energy supplies. Even so, the Community would still be able to cover only half of its energy needs from internal sources and would have to import at least 500 million tonnes of crude oil.

Over the same period, unless there were far-reaching change in American policy, world demand for oil would be growing at a rate so high that by 1990 it could be covered fully only if the OPEC's present production were doubled.

As a result of this situation, the Community faces a physical constraint, an export constraint, and a financial constraint.

A. The physical constraint arises from the fact that it is unlikely that oil production can be doubled in the next 10 years and, consequently, from the risk of restrictions and interruptions in the supply of oil. This constraint necessitates three types of action:

1. In the first place, measures must be put into effect which meet the urgency of the situation: New energy sources must be tapped and energy savings must be achieved both in industry and in the home; in both fields, prompt and lasting action is required on a scale far exceeding that at present planned. The necessary investment means that Europe must be prepared to pay an even greater price for energy in the immediate future, but the cost/benefit analysis must take account of the long-term upward movement in energy costs and of the gains in terms of security yielded by the reduced outside dependence. Within this context the authorities will have to work out financial and technical targets more carefully and more systematically, thus enabling the implementation of projects some of which will lie beyond individual initiative and require that investment be guided. The Community must now begin to lay down specific guidelines, supervise their implementation, and increase the financing for alternative sources of energy, i.e. those represented by the coal and nuclear industries.

2. Secondly it will be necessary to increase Community mining and energy investment in the producing states; the decline in this type of investment in the 1970s may lead to major difficulties for Europe in the 80s. New discoveries no longer cover new needs; accessible deposits must be located and the resources needed for working them must be found.
 3. Lastly, vigorous action is required at an international level to induce other consumer states, especially the United States, to pursue policies as strict as those implemented in the Community: it will also be necessary to take certain action in common, particularly in the field of energy technology, and also to develop a dialogue with the producer states so as to ensure reliable supplies.
- B. The Community is by tradition open to the outside world where it sends a major proportion (1/4) of its industrial production. The oil "levy" which it has had to pay since 1974 implies an additional need to export. But in the 1980s, Europe will have to cope:

- with a probable increase in the real cost of energy, i.e. with a steadily increasing need to export more
- and with keener competition from new states, but especially from the United States and from Japan which, like the Community, will also have to export more. Moreover, these two countries have competitive advantages (strong internal markets, technology, higher productivity or lower production costs) which Europe sometimes lacks.

If the Community is to cope with these export constraints, certain measures will be essential. These can be summarized as:

1. The Community must face its absolute obligation to be competitive through productivity, continuous adaptation to market requirements, and constant modernisation of industrial plants: by refusing to adapt to outside competition, will the Community not only be forced out of third world markets, where others are all too eager to take its place, but also lose ground within its frontiers and become progressively impoverished.
2. Industrial modernisation will enable the European economy to adapt to new circumstances; the high energy-consuming industries and the construction industry must be adapted to reduce their dependence on energy, the structures of old industries, exposed to international competition, will have to be reorganized if their future is to be secure; new forms of energy, backing new techniques, will create new needs; if industry is to export more, as it must, there must be more emphasis on those new sectors which consume relatively little energy and raw materials, use mainly skilled manpower, and are strong in technical innovation.

3. Technological development will be a necessity; it enables industries to adapt continuously to markets, thus ensuring outlets for their products, and is fundamental if the Community is to maintain its independence in certain essential fields in the face of American and Japanese competition.

But there is growing resistance to technological development in Europe because its effects on unemployment are unevenly recognised. The redundancies resulting from innovation are easier to see than the new jobs engendered, many of them in the services industries.

Major technological developments will take place over the coming decade to transform conditions of production and sale in many cases. Such developments are already perceptible in the United States and Japan. Just as the introduction of computers had a profound effect in the 1960s, so in the 1980s will telecommunications, micro-electronics and "telematique" bring major changes. These developments will also affect the high technology industries: for example the introduction of micro-processors will lead to great reductions in the cost of computers and a considerable extension of their use. Technological changes seem likely to proceed faster in the Community's main competitors, thus posing investment and organization problems for the high technology industries in Europe.

4. An open policy to non-member countries is a fundamental choice which is imperative. The Community's objective must be to reduce its present dependence by achieving maximum security in its external relations.

For example, the Community needs to implement a comprehensive and active policy to help finance the development of the developing countries; these countries are suppliers of raw materials and energy, export markets and an essential factor in Europe's security.

This open policy towards third countries will not leave the Community defenceless. On the contrary,

- the Community will have to oppose trade practices and currency movements which distort competition to its disadvantage;
- or be ready to use, as do the United States and Japan, legitimate safeguards to deal with exports from certain third countries or multinational companies operating within their territory.

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C. The financial constraint derives from the fact that relative energy prices will continue to rise given that there is in any case bound to be a sellers' market. For Member States already obliged to export, this constraint will have the following consequences:

1. It will expose the Community to more inflation and will inhibit growth, affecting by the same token price stabilization policies and policies to reduce unemployment.

- The directly price-increasing effect will be more and more noticeable because of "threshold effects", future price increases will have a more than proportionate incidence on growth and prices;

- as the oil bill grows the danger of balance of payments deficits will increase; this could well lead to stop-go policies detrimental to sound growth, and to deflationary measures which will aggravate employment problems;

- in these conditions it will be more difficult to achieve the adjustment needed, especially in the industrial field; the major changes in the past, such as the rural exodus in the 1960s, show that adaptation can be achieved smoothly only in an economy which is steadily expanding and creating new jobs.

2. This financial constraint gives rise to an essential objective: growth with a low consumption of energy. The growth rate of the economy must be separated from the rate of growth of energy consumption. The Commission will shortly be submitting a report on this fundamental question to the Council.

II. THE MAIN CONSEQUENCES FOR ECONOMIC AND SOCIAL POLICY

The task to be undertaken is a vast one, but the stakes are correspondingly high. Europe is capable of achieving it: it has all the required human, technological and financial resources.

But Europe will succeed only if it overcomes the major problems one by one and resolves the contradictions facing its policies.

The contradictions essentially concern the employment problems; the external constraints necessitate the rapid modernisation of the economy, while limiting the potential for growth and thus affecting policies designed to reduce unemployment.

A. The employment objective

1. The situation will be aggravated in the 1980's by population trends. Notwithstanding some variations across the states and regions, total population will grow little between 1980 and 1990 (0.2% a year, compared with 0.7% a year from 1950 to 1975) then stabilize and even, in the Federal Republic for example start to decline.

The population of working age will develop in the opposite way. It will increase by 0.9% a year, i.e. about a million people, until 1985. Thereafter the rate will diminish gradually, by 1995 yielding a stabilization of the working age population.

These trends will have three important consequences:

- (a) At the economic level, they imply a rise in the average age of the population which by the end of the 1980's will affect the dynamism of the economy, labour mobility and Europe's power. By the year 2000, the population of Europe will represent only 4% of world population, compared with 6.5% in 1975.
- (b) This ageing of the population will also mean an increased burden on public expenditure.
- (c) The population trends increase the hazards attached to the policies now being considered to deal with a temporary labour surplus (holding back productivity, adjusting working hours, raising the school-leaving age, etc.) They will come up against two problems:
- The first is the competitiveness requirement, which implies stabilizing wage costs;
 - The second will arise when the trends change direction around 1985. The measures now adopted to mop up part of the excess labour supply could, in some five to seven years, make it more difficult to solve the problem of a labour shortage.

The long-term population trends merit discussion by the European Council at a later date. In the immediate future, they will represent a factor further aggravating the employment situation.

B. The solution : improved growth

It is vital that we achieve growth which is healthy, lasting, and, necessarily, economical of energy, in order to guarantee the dynamism of the market, restore the confidence necessary for higher investment, and enable indispensable structural changes to be made smoothly:

1. Any discussion of future growth must be based on the assumption that the Community can count on a continuous supply of energy. But it is clear that even if this problem were solved, the basic conditions of growth would still be changed by the trend of oil prices; massive resource transfers will result firstly from oil imports, secondly from increased investment expenditure as a percentage of GNP, and thirdly from increased public expenditure to ensure the required adjustments and transitions. As a result:

- consumption will increase more slowly, and real incomes will remain steady;
- it will be impossible to achieve very high growth rates, comparable to those of the 1960's for example.

2. Since 1974, growth has been weaker in Europe than in the rest of the industrialized world; this is probably because growth has been hampered by external constraints and particularly those resulting from oil prices on the one hand and by monetary instability on the other. But the example of other countries shows that Europe is not exploiting its growth potential to the full: further growth could be achieved if energy consumption were reduced and certain activities stimulated. The development of concerted action at Community level would also enhance the usefulness of national policies and improve the results, in terms of growth, that each one can be expected to show.

3. Growth, then, must be without inflation if competitiveness is to be maintained. This means rigorous economic policies to ensure the control of prices, a restriction on the rise in real wages, and currency stability, i.e. the external balance.

The introduction of the EMS is an essential step in paving the way for reasonable policies. To protect the EMS and to broaden its effects, the Community must endeavour, in agreement with its partners as regards, inter alia, economic discipline, to rebuild the international monetary order whose collapse has been the source of many of our present difficulties.

4. Even if the Community manages to achieve healthier growth, it is unlikely, given the exceptionally abundant supply of new labour until 1985 and the industrial reconstruction in train in certain sectors, to be in a position to solve the employment problem entirely, without back-up policies. It is in this context that we need to look at the current debate on issues such as adjustments to working time and the value of manual labour. Moreover some useful but non-commercial activities are bound to develop as society progresses. This new demand for cultural activities, organised leisure, environmental protection, and so on could supply new scope for employment.

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5. Whatever happens, steps must be taken to ensure that the labour supply adjusts to necessary industrial and technological developments. If not, successful growth is very unlikely to be achieved. In view of the scale and suddenness of the expected changes, a special effort will have to be made in the areas of adult education and retraining, geographical mobility of labour, and policies to deal with specific problems such as unemployment among young people.

C. A means: Investment

Sustained and non-inflationary growth is required to meet both the need arising from external constraints for competitiveness and increased exports and at the same time the essential objective of creating new jobs to bring unemployment down. In view of the underlying contradictions between these two requirements, growth must be based on increased investment.

Increased investment is the common denominator underlying all the solutions to structural, growth and employment problems. Public or private investment will be required in order to loosen the energy constraint, modernise the economy, increase production capacity and develop research and innovation. It will ensure faster growth without inflation. In all these fields, and especially that of energy, there are obvious needs, which will be among the factors stimulating growth throughout this period and which will create new, better-qualified jobs which constitute the only lasting solution to the unemployment problem.

It is therefore essential to halt and reverse the present trend since 1973 of diminishing investment as a percentage of gross national product. A general economic background conducive to investment must be created, with stable prices and currencies, tax incentives, better co-ordinated and larger scale investment in equipment, and the consolidation of the single Community market, which is essential to industrial development.

In respect of the above considerations, the deliberate encouragement of technological development through fiscal and other measures will be imperative. This means that the Community should actively consider how a Communitywide market could best be developed. In some key areas Member States and the Community need now to see whether joint objectives can be set and to explore what actions can complement the initiatives which are already being undertaken in the public and private sectors.

D. A requirement: the maintenance of the economic and social balance.

This transformation will call for a considerable effort: considerable but not impossible. There is no reason why Europe should resign itself to unemployment. But the effort cannot succeed unless the groups and individuals involved in social, economic and political life come to understand the importance of certain priorities, and commit themselves unreservedly to the task in hand.

- (a) The Community must take full advantage of its independence and strength in certain areas: for example it must maintain the asset of a powerful agricultural sector, based on a strong Common Agricultural Policy better adapted to market needs.

But growing rifts may begin to appear between industries directly subject to external competition and industries that are to some extent protected. A balance will have to be struck between these different economic sectors, and care will have to be taken to ensure that the burden on society of energy constraint and industrial modernization is fairly shared out.

- (b) The need for greater solidarity in the face of underemployment, the increased share of investment in public budgets and the burden of an ageing population in the 1990's, give rise to questions about the role of the authorities and the conditions for financing their action.

But it looks as though taxation is now as high as it can tolerably be; thought must therefore be given to improving the allocation of public expenditure in line with priorities. Such thought could concentrate on the possibility of devoting a larger share of available resources to creating jobs.

- (c) The Community provides an ideal framework for assessing these problems and analysing these developments so as to identify priorities that are not always easy to apprehend at national level.

Widespread agreement on aims and priorities will be essential in the 1980's. Everything possible must be done to reach such agreement. For example, it would not be acceptable to constrain the growth of real incomes if most of the burden were borne by a particular fraction of the population. The efforts and the sacrifices called for are not intolerable in themselves; they would become so if they were not shared out fairly enough.

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Four conclusions may be drawn from this analysis:

1. The energy problem is the most important problem facing Europe. The measures required to deal with it must be taken quickly. If they are not the European economy will run the risk of structural collapse.
2. The constraints arising as a result of Europe's excessive dependence on energy call for a rapid rise in investment, and the restriction of consumption and thus of the growth of real incomes. Europe has entered a decade of rigour and vigilance in the conduct of economic policy. This rigour and vigilance will be accepted only if accompanied by more social justice and if the burden is fairly shared out.
3. A comprehensive analysis of the nature of international relations is required. They are changing in unstable and unpredictable ways. In order to contain these changes and to give greater security to the Community's external relations, structures and mechanisms will have to be established to ensure that the economic and monetary decisions of the industrialized countries are consistent with one another. In addition, it will be necessary to enter into a dialogue and even into quasi-contractual relations with the developing countries.
4. The authorities will have a decisive role in deciding how best to use limited means and resources in the face of contradictory priorities, how to channel investment towards the most important sectors and to facilitate the transformation resulting from energy problems. How to conduct economic policies that really do ensure healthier growth in spite of the constraints to which they are subject. The role of the authorities will change. They will have to reconcile the need to give firms all the scope for initiative they require in order to adjust continuously to the market, with the need to achieve certain basic aims that require their intervention and their support. More particularly in the industrial field, the Commission will have to provide data on the adaptations necessary, on developments made possible by innovation and on the consolidation of strong sectors. The Community will have a vital part to play in ensuring that programmes which are implemented are compatible and that the Community market, which could be adversely affected by increasing intervention by the state in economic life, remains coherent.

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29/30 NOVEMBER 1979

NOTE BY FOREIGN AND COMMONWEALTH OFFICE

Attached is a Commission paper on telematics
which has now been received. It should be added to the
Brief No 8 as Ref B .

Foreign and Commonwealth Office
23 November 1979

COMMISSION OF THE EUROPEAN COMMUNITIES

COM(79) 683 final

Brussels, 22nd November 1979

EUROPEAN SOCIETY AND THE DATA TECHNOLOGIES:
TOWARDS A COMMUNITY RESPONSE

(Communication for European Council session,
Dublin, 29/30 November 1979)

COM(79) 683 final

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EUROPEAN SOCIETY AND THE DATA TECHNOLOGIES:
TOWARDS A COMMUNITY RESPONSE

I.1. In face of the radical changes which are rocking Europe, and are posing particularly thorny social, economic and political problems, it is essential to establish whether the European Community is taking all the opportunities afforded it to promote the smooth development and ongoing adjustment of our society.

The swift rise of informatics, data banks, telecommunications and micro-electronics and their convergence upon an integrated system already coming to be known as "telematics" is an eminently suitable subject for Community attention and Community action.

This complex of industries is a high-growth sector—over 15% a year. As such, it must contribute to the industrial and tertiary redeployment of a Community that has been in a state of crisis for five years.

The sector is one of strategic importance, since not only is it developing faster and faster but its development has a direct bearing on the competitive capacity of many other branches of activity concerned by data processing and automation.

This being so, the data technologies are a determining factor in the world position of European industry.

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And by their impact on everyday life their irruption is causing anxiety and is making it vital to adapt our data equipment. This is therefore very much a field where action by States and by industries will have its effectiveness enhanced if a Community strategy emerges—something that calls for a stimulus the European Council can impart.

I.2. Is it really possible to ensure that Community action can have a beneficial multiplier effect on the operations of States and companies?

In the first place the data technology market is a world market in which the Community has to meet both an American challenge based on the huge continent-wide United States market and a Japanese one based on the combined operation of the industrialists and the public authorities.*

Our responses to these challenges are national ones—good and competent responses certainly, but limited in their effectiveness by our small-scale markets and industrial structures—or else intercontinental cooperation arrangements which unless operated on an equal footing consign European industry to the role of mere sub-contractor or captive supplier.

In the second place market size is essential given the importance of economies of scale. Now in fact the EEC does have a continent-wide market matching the American one in size.

In the third place, since these technologies are all set to form an integrated system based moreover on micro-electronics, it is necessary to proceed in step in each of the system's components if there is not to develop either a dependence involving structural timelags or an assortment of bottlenecks. Now most of these components—infrastructure, satellites, network interconnection, standards, research and public orders for pilot installations—cannot reach European market scale unless the Community promotes a strategy for the whole sector.

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*See annex.

In the fourth place the EEC market provides the European companies with a springboard for a vigorous drive on the world market. Thanks to its links with the ACP and Mediterranean countries, the Community can give valuable support to its industrialists' operations.

Detailed discussions the Commission has had in recent months direct with industrialists and Government departments, including more particularly the telecommunications services, have convinced it that the public and private operators on whom the development of new services and products is primarily incumbent are awaiting a clear sign from the Community before framing their own medium-term strategies.

- II. A strategy of this kind, then, is highly desirable and needed as soon as possible: it remains to establish whether the Community can produce one. Obviously there can be no question of a common policy centrally managed by the Commission, but on the other hand a more pragmatic approach without a clearly-defined perspective would not do the job.

A policy focused wholly on research would not take account of the difficulty of conducting an effective low-cost operation necessarily involving all the industrialists and all the Government departments for every project.

Nor can there be any question of artificial standardisation whereby those who have already made a start would forfeit the benefits of what they have done. What is wanted is an overall strategy aimed at securing for the European industry a substantial slice of the world market, say one-third in 1990, by close, ongoing, restructured Community-level concertation between the

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States, the industry and the trade unions, each in so far as directly concerns it.

The strategy would set out to do six things:

(a) To get rid of resistances to innovation

- . by making it clearer that employment can benefit if the necessary decisions are taken at the different levels in the Community, and will certainly suffer if they are not;
- . by pursuing the education and training policies needed for innovation;
- . by ensuring that there is no encroachment on private life and individual liberties.

(b) To create the market

To create a homogeneous European public market for the new data services and products, there should be Council decisions:

- . requiring the telecommunications departments to develop the new services and overall network (spoken word, written word, data) on a harmonized basis;
- . ensuring that public purchasers of hardware imposed common standards on their suppliers.

(c) To develop the basic micro-electronic technology that will enable the whole of European industry to be competitive in the 1980s—failing that, European industry will be dependent on outsiders for its "raw material."

.../...

- (d) To set up data banks capable of being competitive at world level.
- (e) To turn to account the advantage of the Community as such as the first user of data techniques and first supplier of data to try out and perfect:

an all-purposes interinstitutional network connecting the Community Institutions and the capitals of the Nine Member States;

the extension of the existing Community Euronet-Diane project to other data banks and other users.

- (f) To effect coordination of the Member States' positions so that Europe can play its proper part in the organizations dealing with telecommunications and space matters. Decisions of universal import must not be imposed on Europe without regard for Europe's own interests: to ensure this in the space field there must be European coordination of Europe's requirements (number, launchings, choice of orbits, determination of uses).

III. The European Council is asked to acknowledge that the Community can and should bring into being as speedily as possible an integrated corpus of telecommunications and data production, processing and transmission—a vital means to expansion and a framework for human progress.

So many sectors and so many disciplines being involved, the European Council requests the Commission to spell out more fully the main lines of this strategic approach, in order that it may

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act in 1980 and thus afford the European data technology industries the chance to achieve the aim of supplying one-third of the world market in 1990.

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	'000 mn EUA in world market	World market growth rate	Market share 1977			Production share 1977		
			EEC	Japan	USA	EEC	Japan	USA
Telecommunications	26.6 (1977)	7%	29%*	12%	33%*	*c.27%	3%	30%
Computer systems	53.3 (1978)	17%	26%	15%	42%	c.25%	c.15%	44%
Integrated circuits	3.3 (1978)	25%	19%	23%	54%	10%	20%	70%
Data banks	2 (1978)	22%	25%			15%		

*Western Europe
 *** Canada