Illicit drugs are big business. They are one of the main profit-generating activities of organised crime and are estimated to represent around one-fifth of global crime proceeds. Every year, Europeans spend at least EUR 24 billion on illicit drugs. If the sums of money spent on these drugs are considerable, so too are the costs for our society.

The 2016 EU Drug Markets Report, from the EMCDDA and Europol, was launched on 5 April in Brussels (1). The report provides a state-of-the-art analysis of the EU illicit drug market, presenting the dynamics and trends along the supply chain: from production and trafficking to marketing, distribution and consumption. The report, and its Strategic Overview, describe a market which is constantly evolving, adaptable and opportunistic, posing a key challenge for policy, law enforcement and public health.

Dimitris Avramopoulos, European Commissioner for Migration, Home Affairs and Citizenship said: ‘Today’s drug business criminals are quick to exploit and harm global flows of transport, goods and people, while posing a threat to public health. They use new technology and the internet, the growth of global trade and commercial infrastructure to perform their criminal activities rapidly across international borders. In addition, the instability in regions neighbouring the EU could have potentially profound effects on the drug market in Europe. This valuable report explores the links to other criminal activities and how the illicit income from the drug trade can fund migrant smuggling and terrorism…’

Europol Director Rob Wainwright added: ‘Illicit drug production and trafficking remains one of the largest and most innovative criminal markets in Europe. As it grows more complex and becomes entwined with other forms of crime, and even terrorism, it represents a key threat to the internal security of the EU…’

‘The EU drug market is essentially driven by two simple motives: profit and power’, continued EMCDDA Director, Alexis Goosdeel. ‘Understanding this, and the wider impacts of drug markets on society, is critical if we are to reduce drug-related harm. This knowledge is essential for the development of new strategies for tackling crime and safeguarding the health, security and prosperity of our citizens.’

Three themes emerge from the analysis: organisational and technical complexity, interconnectedness and specialisation of groups involved in drug markets; accelerated change in the market, due to globalisation and technology; and the concentration of drug market-related activities in a number of established and emerging geographical ‘hotspots’.

European Drug Report 2016

What are the latest trends in drug supply to Europe? What drugs are causing the most harm and concern today? What are the most recent developments in drug prevention, treatment and policy? These and other questions will be explored by the EMCDDA in its annual overview of the European drug situation to be launched in Lisbon on 31 May.

The European Drug Report 2016: Trends and Developments provides a comprehensive analysis of the latest tendencies across the 28 EU Member States, Turkey and Norway. In print and pdf in 24 languages, the report examines: drug supply and the market; drug use prevalence and trends; and drug-related health problems and responses to them.


Impacts of drug markets ‘go beyond harms caused by use’

The impacts that illicit drug markets have on society are wide-ranging and ‘go beyond the harms caused by drug use’, states the 2016 EU Drug Markets Report. It describes how drug markets impact on our lives in a number of ways through: links with other types of criminal activity, including terrorism; their effect on legal businesses and the wider economy; the strain on, and corruption of, government institutions; and their broader negative societal effects (e.g. drug-related crime and violence, environmental damage and harms to families and communities).

As part of an ongoing project, the report provides an initial minimum estimate of the size of the EU illicit drug market. Europeans are estimated to spend at least EUR 24 billion per year on the main illicit drugs (range: EUR 21 to 31 billion).

What factors are driving drug market developments?

The EU illicit drug market is becoming increasingly diversified and organised crime groups (OCGs) — spurred by the desire for profit or power — rapidly exploit new opportunities for increasing revenues and evading detection. Analysing the factors driving developments can help design appropriate responses. The report describes how the rate of change in the market is driven and accelerated by globalisation and technology. As with other consumer goods, the internet has been influential in the drug business, providing both sales outlets and opportunities to shorten the supply chain, while reducing opportunities for law-enforcement interventions. The report proposes that viewing the market from a business perspective could help identify new areas for intervention.

The reality of the cannabis market

Cannabis accounts for an estimated 38% of the retail market for illicit drugs — worth over EUR 9.3 billion annually. The benign public image of the cannabis market sits in sharp contrast to modern reality, where the industry is linked to organised crime. OCGs are heavily involved in this market, making full use of technological innovations to produce large quantities of more potent and profitable products inside Europe itself. Intense competition in the market can lead to extreme violence between OCGs. While the European market is dominated by herbal cannabis (marijuana) grown within the EU, there is evidence of other competing developments. These include the trafficking to the EU of high potency cannabis resin (hashish) from Morocco, alongside trafficking of other illicit goods and human beings. This is a trend potentially exacerbated by instability in North Africa and the Middle East.

A dynamic heroin market

Estimated to be worth around EUR 6.8 billion per annum, heroin accounts for some 28% of the illicit drug market. The report demonstrates how heroin production techniques and locations, trafficking routes and modi operandi are increasingly flexible and dynamic. After a period of decline, there are signs of increased availability, suggesting the potential for new outbreaks of use.

Opium production remains generally high in Afghanistan and there are indications of displacement of heroin production to new countries, including some inside Europe. While the Balkan route remains a key corridor for heroin entry to the EU, new routes are emerging involving Africa, the Southern Caucasus, Syria and Iraq. There are also signs of diversification, with prescription medicines and new synthetic opioids increasingly misused.
2016 EU DRUG MARKETS REPORT

COCAIN

Maritime container transport: key mode of cocaine smuggling

The retail market for cocaine — Europe’s most commonly used illicit stimulant — is estimated to be worth at least EUR 5.7 billion per year. Coca cultivation appears to be on the rise, after a period of decline, but there is considerable uncertainty about how much is turned into cocaine and where this occurs. Both sea and air transport are used to traffic cocaine into Europe, with Colombia, Brazil and Venezuela being key departure points. The Caribbean and West Africa remain important transit areas, while Central America is also emerging in this role.

Legitimate transport and logistical infrastructures, including major European ports, continue to be exploited by drug traffickers. Maritime container transport is a key mode of cocaine smuggling and a convenient channel for importing large consignments of drugs. These practices are challenging to detect — Rotterdam for example receives over 20 000 containers per day.

Colombian and Italian groups continue to dominate wholesale cocaine supply to Europe, where they cooperate with other (e.g. Dutch, British and Spanish) OCGs. West African, especially Nigerian, groups are also active in transporting cocaine from Africa to Europe and Balkan OCGs are emerging players.

SYNTHETIC DRUGS

Production more sophisticated

The market for amphetamines (amphetamine and methamphetamine) is estimated to be worth at least EUR 1.8 billion annually and for MDMA (ecstasy) some EUR 0.7 billion. These synthetic drugs appeal to both recreational and marginalised drug users and the market for them interacts with those for cocaine and some new psychoactive substances (NPS).

Inside the EU, the Netherlands and Belgium in particular are important producers of MDMA and amphetamine, while most methamphetamine production occurs in the Czech Republic. Production is becoming more sophisticated, for example with the use of a decentralised, on-demand model; customised equipment; and automated production. Diversification in production methods (e.g. use of new drug precursor and pre-precursor chemicals) may increase health risks for consumers. The dumping of toxic waste from production also causes environmental damage and poses health risks to the general public.

NEW DRUGS

Over 560 new drugs monitored

There are no signs of a slowdown in the number, type and availability of new psychoactive substances (NPS) sold openly on the European market. Around 100 new substances were reported for the first time in 2015 and the EU Early Warning System currently monitors over 560 substances.

Producers anticipate legal and regulatory controls by rapidly developing new substances. Globalised supply chains allow bulk quantities of NPS to be ordered online and quickly transported to Europe where they are packaged and marketed on the open, or illicit, drug market. This low-risk, high-profit business attracts the involvement of organised crime and there are now signs of NPS production inside Europe. Entrepreneurs have developed distinct, but overlapping markets, such as ‘legal highs’, ‘research chemicals’ and ‘dietary supplements’ sold through both ‘bricks and mortar’ and online shops. As NPS availability has grown, so too have the harms associated with them, such as acute poisonings, which can be fatal.

STAKEHOLDERS

‘Meet the authors’ event

The official launch of the 2016 EU Drug Markets Report (see p. 1) was followed by a ‘meet the authors’ event at the European Commission (EC), co-organised by the EMCDDA, Europol and the EC Anti-Drugs Policy Unit of the Directorate-General for Migration and Home Affairs. The exhibition-style event brought together key stakeholders and experts responsible for the analysis to discuss the main issues of the report.

Directors Goosdeel and Wainwright opened the session, explaining the purpose of the event: to encourage interaction and debate, answer queries and moderate discussions around the action points of the report. Operated by specialists from the two agencies, four dedicated thematic areas were set up on: the impacts of drug markets and market size estimates; natural drugs; synthetic drugs and NPS. The online interactive elements of the report created the backdrop for the thematic corners and stimulated lively discussion and debate.

emcdda.europa.eu/start/2016/drug-markets

RESPONSES

Tackling the illicit drug market

The report looks at the main EU policies and strategies addressing drug supply reduction and highlights how coordinated action at EU level can make a difference in tackling the illicit drug trade. It outlines a comprehensive range of recommendations and action points in key areas to inform future policies and initiatives.

Andrew Cunningham, Laurent Laniel and Nicola Singleton
**INCB 2015 Annual report**

The 2015 Annual report from the International Narcotics Control Board (INCB) was launched in Vienna on 2 March 2016. Released in the run-up to the United Nations General Assembly Special Session (UNGASS) on drugs, this year's report contains a chapter designed as a specific contribution to this session. Entitled 'The health and welfare of mankind: challenges and opportunities for the international control of drugs', it recalls that the ultimate goal of the three UN drug control conventions is to protect public and individual health and welfare and not to mandate a 'war on drugs'.

The INCB stresses in the report that ensuring the availability of drugs for medical purposes and reducing the illicit supply of drugs needs to be carefully balanced. It also: encourages governments to devise realistic measures to protect the public from the harms posed by NPS; calls on governments to ensure that health-care providers do not overprescribe sedatives; and calls for an assessment of the state of the international precursor control system.

**Publisher:** United Nations (INCB)  
**Languages:** Arabic, Chinese, English, French, Russian and Spanish.  
**Date:** 2 March 2016  
**ISBN:** 978-92-1-148283-6  
**Downloadable:**  

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**FEATURE**

**EMCDDA presents latest advances in monitoring illicit drugs in wastewater**

The latest advances in the science of wastewater analysis were presented by the EMCDDA on 15 March in a new report: Assessing illicit drugs in wastewater (1). The report was presented in Vienna at an event — ‘Use of wastewater analysis to understand drug markets’ — being held in the margins of the annual meeting of the UN Commission on Narcotic Drugs (CND)(2).

Wastewater analysis is a rapidly developing scientific discipline with the potential for monitoring near-real-time data on geographical and temporal trends in illicit drug use. By sampling a known source of wastewater (e.g. a sewage influent to a wastewater treatment plant), scientists can estimate the quantity of drugs used in a community by measuring the levels of illicit drugs and their metabolites excreted in urine.

The EMCDDA adopts a multi-indicator approach to drug monitoring, on the principle that no single measure can provide a full picture of the drug situation. It views wastewater analysis as a valuable additional tool in its epidemiological toolkit and one which can provide timely information on a wide spectrum of substances.

Launching the report, EMCDDA Director, Alexis Goosdeel, said: ‘Wastewater-based epidemiology has demonstrated its potential to become a useful complement to established drug monitoring tools’.

The report explores the latest findings from the worldwide application of wastewater-based epidemiology and the advances that have occurred since 2008. These include developments to reduce uncertainties and to standardise procedures, including a best-practice protocol developed by the Sewage analysis CORe group Europe (SCORE) network (3).

Two case studies (Norway, Italy) show the first attempts to compare cocaine-use estimates obtained through wastewater analysis with conventional epidemiological data gathered through population surveys. Also described are three new approaches for dealing with new psychoactive substances (NPS). These include using pooled urine samples from nightclubs and music festivals to provide timely data on which NPS are being used and in which locations. Detecting and estimating the use of NPS presents a particular challenge for drug epidemiology due to the rapid rise in their number and availability.

Finally, the report highlights gaps and requirements for future research, including the need for addressing the ethical aspects of wastewater-based epidemiology. Better integration of this novel methodology with existing epidemiological indicators will allow for a better understanding of the drug situation in Europe.

**Liesbeth Vandam**

This report updates the first edition published in 2008.  
See also [www.emcdda.europa.eu/activities/wastewater-analysis](www.emcdda.europa.eu/activities/wastewater-analysis)  
(2) Organised by the Governments of Italy and Switzerland, UNODC and the EMCDDA.  
(3) For more, see [http://score-cost.eu](http://score-cost.eu)

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UNGASS 2016

The 2016 UN General Assembly Special Session (UNGASS) on drugs convened at the UN headquarters in New York from 19–21 April (1). This meeting — the third UNGASS dedicated to this issue — represented a major political moment and valuable opportunity for the international community to review and address the world drug problem.

Via plenary statements, interactive roundtables and some 50 side events, delegates at UNGASS 2016 reviewed progress made in implementing the ‘2009 Political Declaration and Plan of Action on international cooperation towards an integrated and balanced strategy to counter the world drug problem’ (2).

The meeting adopted an ‘outcome document’ entitled: ‘Our joint commitment to effectively addressing and countering the world drug problem’ (3). This document places new emphasis on a number of themes, including: new trends and emerging and persistent challenges and threats (e.g. new psychoactive substances and use of the internet); availability of, and access to, controlled substances for medical purposes; and the treatment of drug use disorders (with a focus on prevention, treatment and care of HIV/AIDS). The paper includes operational recommendations in areas ranging from demand reduction to effective law enforcement and judicial cooperation.

At UNGASS, the EU stood united in reaffirming its commitment to the UN international drug control conventions, which provide sufficient scope and flexibility to accommodate a wide range of approaches to drug policy in accordance with national and regional specificities. In its common position, adopted on 11 November 2015 (4), the EU reiterated the need for countries to respect human rights when implementing the international conventions. In this context, it called for the abolition of the death penalty for drug-related crimes and for proportional sentencing and alternative measures to conviction or punishment.

The EU delegation, including members of the EMCDDA, was headed by Neven Mimica, European Commissioner for International Cooperation and Development. On behalf of the EU, the Commissioner welcomed the re-balancing of global drug policies towards a multi-disciplinary, public health and human rights approach. He also stressed how effective drug policies must be based on evidence and reliable monitoring systems. Following the adoption of the outcome document, the EU presented an oral statement — on behalf of the Member States and 28 third countries — regretting the non-inclusion in the statement of the abolition of the death penalty for drug-related offences.

This document renewed the 10-year commitment to reducing illicit supply and demand for drugs by 2008, made at the last UNGASS on drugs in 1998.
(4) www.unodc.org/documents/ungass2016//Contributions/IO/EU_COMMON_POSITION_ON UNGASS.pdf

DRUGS-LEX

Upcoming UK law to control distribution of NPS

The Psychoactive Substances Act 2016, approved by the UK Parliament at the beginning of this year, is due to come into force this Spring (1). The law is designed to prevent manufacturers and suppliers from continually replacing recently controlled psychoactive substances with non-controlled alternatives.

The act defines a psychoactive substance as ‘any substance which is capable of producing a psychoactive effect in a person who consumes it’. This means a substance which, by stimulating or depressing the person’s central nervous system, affects the individual’s mental functioning or emotional state. The act specifically excludes: controlled drugs; medicinal products; alcohol; nicotine and tobacco products; caffeine and food. Other substances may also be excluded in future.

Supply offences are aggravated by the following factors: proximity to a school; using a minor as a courier; or being carried out in a custodial institution. The maximum penalties specified in the act are seven years’ imprisonment on indictment or one year on summary conviction. Possession of a psychoactive substance (not for supply) in a custodial institution is punishable by up to two years’ imprisonment on indictment or one year on summary conviction; otherwise, there is no offence for possession for personal use (except in custodial institutions).

The Psychoactive Substances Act 2016 operates alongside the amended Misuse of Drugs Act 1971 and its system of Temporary Drug Control Orders (2).

NEW PSYCHOACTIVE SUBSTANCES

Strengthening early warning on new synthetic opioids

As revealed in the 2016 EU Drug Markets Report, around 100 new psychoactive substances (NPS) were reported through the EU Early Warning System for the first time in 2015. Once again, the list of substances reported was dominated by two groups: synthetic cannabinoids and synthetic cathinones. Together these represent 61% of the NPS seized in Europe in 2014.

Concerns are growing, however, over the number of new synthetic opioids being detected on the European market, despite the comparatively small amounts seized. A total of 19 new synthetic opioids — including 11 fentanylys — have been detected since 2009, most of which have emerged in the last three years.

New synthetic opioids are of particular concern as they can pose a very high risk of serious poisoning or even death. In the course of 2014, following deaths reported in a number of EU countries, the EMCDDA Scientific Committee risk assessed a synthetic opioid known as AH-7921 — the first opioid to be assessed (1). This was closely followed by another synthetic opioid MT-45 (2).

Concerns are growing over the number of new synthetic opioids being detected on the European market

In 2015, deaths in Europe linked to acetylfentanyl prompted the EMCDDA and Europol to produce a Joint Report on this substance (3). Responding to these concerns, the EMCDDA organised in Lisbon on 31 March and 1 April 2016 a technical meeting bringing together a multi-disciplinary group of experts. The aim of the meeting was to discuss the challenges posed by these substances and to identify practical ways in which early-warning systems could be strengthened in order to reduce harms to society. A summary of findings will be published in the coming months.

Rita Jorge and Michael Evans-Brown

(2) www.emcdda.europa.eu/publications/risk-assessment/mt-45
(3) To be published in the coming weeks.

Drug supply data-collection training for ENP countries

‘Data collection and reporting on drug seizures’ was the title of a two-day Reitox Academy organised by the EMCDDA from 17–18 March in Budapest. The training seminar — hosted by the European Police College (CEPOL) and targeting beneficiary countries of the European Neighbourhood Policy (ENP) — welcomed delegates from Georgia, the Republic of Moldova and Ukraine.

The purpose of the event was to provide specific training on the use of established EMCDDA data-collection tools and methodologies to allow participants to systematically collect, analyse and report national drug seizure data. In the days following the training session, the participants embarked on a retrospective data- and information-gathering exercise in the three countries concerned, spanning a five-year period (2011–15).

The training and data-collection exercise were organised under a project, ‘Towards a gradual improvement of ENP partner countries’ capacity to monitor and to meet drug-related challenges’, currently being implemented by the EMCDDA and financed through the European Neighbourhood and Partnership Instrument (ENPI) of the European Commission (4).

Andrew Cunningham, Teodora Groshkova and Frédéric Denecker

PRODUCTS AND SERVICES

2016 EU Drug Markets Report

The 2016 EU Drug Markets Report, from the EMCDDA and Europol, was launched in Brussels on 5 April (see pp. 1–3). The extensive 188-page In-depth Analysis provides a unique insight into the operations of illicit drug markets in the EU and assesses their ramifications for society as well as key drivers of change. The report reviews the markets for cannabis, heroin, cocaine, amphetamine, methamphetamine, MDMA and new psychoactive substances and provides concrete action points to inform policy development at EU and national level. The report is accompanied by a Strategic Overview, providing a summary of key findings, and additional supporting material.

In-depth Analysis (EN) www.emcdda.europa.eu/publications/eu-drug-markets/2016/in-depth-analysis

Assessing illicit drugs in wastewater

The latest EMCDDA Insights launched on 15 March — Assessing illicit drugs in wastewater: advances in wastewater-based drug epidemiology — reviews a novel approach to estimating drug use in populations, based on the detection and quantification of drugs and their metabolic products in community wastewater. Strengths of the wastewater-based approach include avoiding the problems associated with questionnaire-based research, better identification of the drugs being used and ability to provide near-real-time results.


The internet and drug markets

How do online drug markets function? What technologies do they use? How do they relate to the traditional drug market? How can they be monitored and controlled? The complexities of these questions are unravelled in an EMCDDA Insights published on 11 February: The internet and drug markets. This new EMCDDA investigation into the world of online drug markets brings together state-of-the-art evidence from over 20 experts and contributes to the knowledge base on this part of the supply chain.


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Update at http://surveys.publications.europa.eu/formserver/emcdda/mailing_list.html

EVENTS

Healthy Nightlife Toolbox

The Healthy Nightlife Toolbox (HNT) is a European website focusing on the reduction of harm from alcohol and drug use among young people in nightlife settings. It will be launched at a meeting of the EU National Drug Coordinators on 2 May in Amsterdam. The aim of the toolbox is to support the identification and implementation of effective interventions in this setting.

The first version of the HNT, supported by the EU, was created between 2008 and 2010, following cooperation between partners from Belgium, Spain, Hungary, the Netherlands and the UK. Now, in 2016, under its EU Presidency, the Dutch government is financially supporting the update of this valuable resource. From May 2016, the HNT will be informing local, regional and national policymakers and prevention workers in the EU on evidence-based and best-practice interventions in nightlife settings. The EMCDDA will host the website in 2017.

For more see www.hntinfo.eu and english.eu2016.nl/events/2016/05/02/meeting-of-national-drugs-coordinators

European drugs summer school 2016

The University Institute of Lisbon (ISCTE-IUL) and the EMCDDA will be holding the fifth European drugs summer school (EDSS) on ‘Illicit drugs in Europe: demand, supply and public policies’ from 27 June to 8 July in Lisbon. This year, the focus of the course will be on the evidence base for policymaking on drug-related issues. Keynote speakers will consider the outcomes of the 2016 United Nations General Assembly Special Session on Drugs (UNGASS). The second phase of registration will run until 30 May.

For more see www.drugsummerschool.cies.iscte-iul.pt/np4/home
EMCDDA scientific paper award

The EMCDDA Scientific Committee is currently assessing eligible nominations for the sixth round of the EMCDDA scientific paper award. The nomination phase ran between January and February, leading to 53 articles being nominated by: editors of peer-reviewed journals; European research societies; the Reitox national focal points; members of the EMCDDA Scientific Committee and EMCDDA staff members.

The nominated articles, published in 2015 in a peer-reviewed journal, are judged to enhance knowledge and understanding in the area of illicit drugs and new psychoactive substances. They also have a clear European focus or a primary author being a European citizen or based in Europe. The Scientific Committee will agree on a shortlist of articles at its next meeting from 11–12 May. These articles will be rated by a jury composed of top-level experts in each of the five research categories (1). Up to five winners may be acknowledged at a ceremony at the EMCDDA in the autumn.

Maria Moreira

(1) Basic biological, neurobiological and behavioural research; population-based and clinical epidemiology; demand reduction; supply, supply reduction and crime; and drug policy.

For more, see www.emcdda.europa.eu/activities/scientific-paper-award

Upcoming ESPAD report

The latest European data on substance use among 15–16-year-old students (2015) will be published by the European school survey project on alcohol and other drugs (ESPAD) in September 2016 (1). ESPAD has been collecting data through school surveys every four years since 1995, the latest wave coinciding with its 20th anniversary.

A common questionnaire and methodology are used to achieve a sound level of comparability across countries and over time. The questionnaire includes a section on illegal drugs, but also a substantial part relating to alcohol. The number of countries participating in the survey has increased over the years: 35 countries participated in the 2015 survey (100 000 respondents).

The 2015 ESPAD report will be presented at the EMCDDA in Lisbon on 20 September following a meeting of the EMCDDA general population surveys (GPS) expert group. Over the last two years, the EMCDDA has scaled up its support for ESPAD and is now a member of its coordination group (2).

Julián Vicente

(1) See Drugnet Europe 95 for more.

(2) www.emcdda.europa.eu/about/partners/espad

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