

Trade and services in Candidate Countries

Over 7 million employees in 1998

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This Statistics in Focus gives a snapshot of 11 candidate countries' trade and services activities. The turnover of these candidate countries' trade and service enterprises amounted to more than 350 billion EUR in 1998. Employment in both these sectors rose in most candidate countries in the three years to 1998. Turnover per head is much higher in the trade sector than in services although profitability, at least expressed in share of value added to turnover, is higher in the latter sector. Cyprus and Slovenia have the highest unit personnel costs among the 11 applicant countries covered in this report. Romania recorded the highest percentage of gross investment in tangible goods as a share of turnover in trade and services in 1998. Structural Business Statistics (SBS) provide standardised data for a whole range of economic activities within the European Union (EU). This wealth of information reflects the economic patterns and dynamics within regions, countries and (sub-) sectors. The EU's future enlargement raised the need for the extension of the SBS data coverage to the candidate countries. The collection process for SBS data from the candidate countries has recently started. Inevitably, there are still a few methodological divergences between the various candidate countries' data that need to be smoothed out over the coming years (see methodological notes). Furthermore, all the candidate countries' data are expressed in current ECU/EUR, which does not reflect the actual purchasing power of the candidate countries' currencies. Nevertheless, the available data present useful gauges for an analysis of the candidate countries' economic sectors.

Over 350 billion EUR turnover in 1998

Turnover from 11 candidate countries' trade and service activities totalled more than 350 billion EUR in 1998 (services here comprise NACE H, I and K –see methodological notes). It is noteworthy however that the figures for the Slovak Republic refer to enterprises with 20 or more persons employed and that Hungarian data only cover enterprises with 5 or more persons employed. This prevents a direct comparison with the other countries (see methodological notes on page 7).

Table 1 - Turnover, 1998

(Mio EUR)

Reporting countries	Trade	Services (*)
Bulgaria (BU)	7 922	2 974
Cyprus (CY)	6 368	:
Czech Rep. (CZ)	53 694	20 074
Estonia (EE)	5 445	2 454
Hungary (HU)	23 267	9 568
Latvia (LV)	5 323	2 182
Lithuania (LT)	7 234	1 906
Poland (PL)	117 783	33 260
Romania (RO)	22 740	5 990
Slovak Rep. (SK)	9 120	3 249
Slovenia (SI)	13 029	5 682

(*) Services here only include NACE branches H (Hotels and restaurants); I (Transport, storage and communication); and K (Real estate, renting and business activities).

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 44/2002

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'Wholesale', 'Transport, storage and communication' most significant producing divisions

In terms of turnover, 'Wholesale trade and commission trade, except of motor and motorcycles' is the most important division within the wholesale and retail trade sector among the 11 candidate countries covered. Interestingly, the contribution of retail trade to turnover in Cyprus is almost as big as that for wholesale trade (see table 2). Other countries with a fairly large retail sector are Latvia, Lithuania, Romania and Slovenia. Slovenia also stands out for its relatively high trade turnover in 'Sale, maintenance and repair of motor vehicles'.

Within the services sector, 'Transport, storage and communication' (NACE Section I) accounts for the largest share of turnover in the majority of the candidate countries. The bulk of turnover in this section is to be found in 'Land transport; transport via pipelines' (NACE Rev. 1 60); 'Supporting and auxiliary transport activities; activities of travel agencies' (NACE rev. 1 63) and 'Post and telecommunications' (NACE Rev.1 64). For some countries no accurate conclusions can be drawn however due to confidentiality issues. Only in Slovenia does 'Real estate, renting and business activities' overtake the dominant position of 'Transport, storage and communication' in turnover terms. In the Czech Republic and Poland

'Real estate, renting and business activities' turnover was similar to 'Transport storage and communication's' share of turnover in the services industry in 1998. NACE section H (Hotels and restaurants) is the smallest of the service sections covered in table 3, with on average around a 10% share of turnover. This share is highest in Bulgaria, while Romania and Slovenia's Hotels and restaurants also contributed more than 10% of the services industry's turnover in 1998. This could be an indication of a significant tourism industry in these countries.

Table 2 - Share of turnover within the trade sector (in %), 1998

	Bulgaria	Cyprus	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovak Rep.	Slovenia
- Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
- Sale, maintenance and repair of motor vehicles	10.7	16.3	13.2	14.7	15.3	11.2	12.5	9.7	10.4	10.7	20.5
- Wholesale trade, commission trade, except motor and motorcycles	73.5	42.1	59.5	60.8	59.7	57.8	53.8	64.3	54.3	74.4	48.0
- Retail trade, except motor vehicles, motorcycles; repair of personal and household goods	15.7	41.5	27.2	24.6	25.0	31.0	33.8	25.9	35.3	14.9	31.6

Table 3 - Share of turnover within the services (*) sectors (in %), 1998

	Bulgaria	Cyprus	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovak Rep.	Slovenia
Hotels and restaurants	15.1	:	9.5	6.0	7.2	6.0	7.8	5.7	10.8	4.9	12.3
Transport, storage, communication	70.8	:	46.4	63.6	60.2	68.9	70.8	49.1	67.0	56.9	42.6
I60 Land transport; transport via pipelines	30.0	:	22.1	14.9	22.8	19.7	27.1	c	29.2	22.8	c
I61 Water transport	c	:	c	10.2	0.6	1.3	5.2	1.7	3.4	0.7	0.4
I62 Air transport	c	:	c	1.8	3.5	2.4	3.0	c	2.7	0.5	c
I63 Supporting and auxiliary transport activities; activities of travel agencies	8.3	:	11.0	26.2	8.2	30.8	15.3	9.2	10.4	8.2	13.2
I64 Post and telecommunications	14.9	:	11.2	10.6	25.2	14.6	20.3	c	21.4	24.7	10.6
K Real estate, renting and business activities	14.1	:	44.1	30.3	32.6	25.1	21.3	45.1	22.2	38.2	45.1
K70 Real estate activities	1.5	:	7.6	12.2	5.4	8.9	4.8	11.7	2.2	8.9	2.3
K71 Renting of machinery and equipment without operator and of personal and household goods	0.3	:	1.4	1.0	0.9	0.8	0.5	1.1	0.5	0.5	0.4
K72 Computer, related activities	1.6	:	6.4	3.0	6.4	2.2	2.6	4.4	2.3	6.4	4.7
K73 Research and development	0.5	:	0.7	0.1	0.8	0.5	0.5	2.6	3.6	5.1	1.0
K74 Other business activities	10.2	:	28.0	14.0	19.1	12.7	12.9	25.3	13.5	17.3	36.7

(*) Services here only include NACE branches H, I and K.

'Retail trade', 'Transport, storage and communication' were the biggest employers in the candidate countries in 1998

On the basis of the number of employees, retail trade is the most important division in the candidate countries within section G 'Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods', except in the Slovak Republic (see table 4). In the latter country, wholesale trade is a slightly bigger employer than retail trade. However, it should be taken into account that the Slovakian data only cover enterprises with more than

20 persons employed and that in retail trade a lot of small enterprises are active. 'Sale, maintenance and repair of motor vehicles' is more important in Slovenia than in the other 10 candidate countries as it provides almost 15% of total employment within wholesale and retail trade in this country. Among the three service sections H, I and K, 'Transport, storage and communication' is the most significant employer in all 11 candidates covered. 'Real estate, renting and business activities' was the second biggest employer in 1998. In Estonia, Hungary, Latvia, Poland, and the Slovak Republic, employment in NACE section K makes up about 30% or

more of employment in the services branches. The Czech Republic and Slovenia had particularly high percentages of employees in 'Other business activities' (NACE Rev. 1 74), boosting the share of employment in Real estate, renting and business activities to more than 37% of total employment in sections H, I and K of the services sector. Bulgaria, the Czech Republic and Slovenia had the highest share of employees working in Hotels and restaurants (NACE section H) in 1998, while most of the candidate countries showed employment figures above 10% for this section, always higher than its share of turnover within the services sector.

Table 4 - Share of employment within the trade sectors (in number of employees), 1998

	Bulgaria	Cyprus	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovak Rep.	Slovenia
- Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
- Sale, maintenance and repair of motor vehicles	10.7	14.0	11.2	12.4	11.5	10.8	13.1	10.5	8.4	8.0	14.7
- Wholesale trade, commission trade, except motor and motorcycles	42.4	40.0	35.6	39.6	36.9	28.0	29.5	42.3	29.9	48.5	38.2
- Retail trade, except motor vehicles, motorcycles; repair of personal and household goods	46.9	45.9	53.2	48.0	51.7	61.2	57.4	47.2	61.7	43.5	47.1

Table 5 - Share of employment within the services (*) sectors (in number of employees), 1998

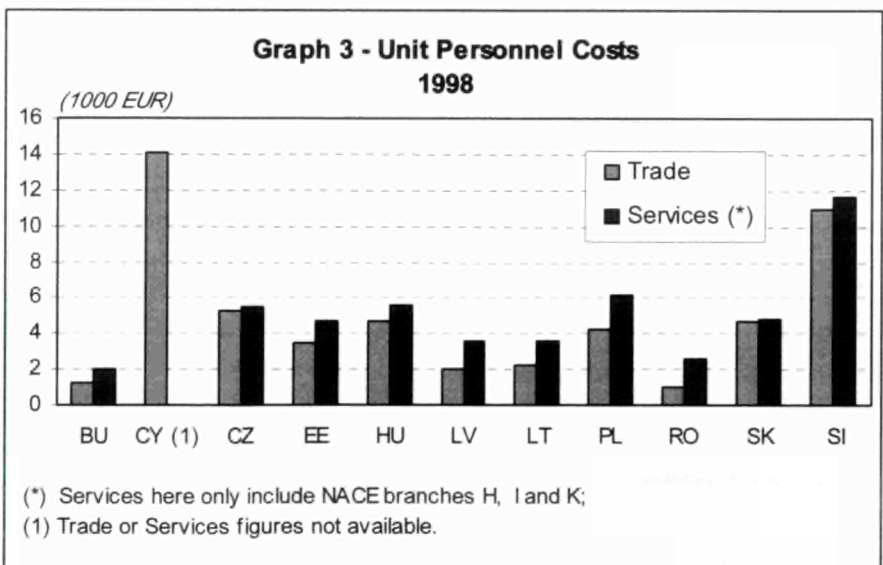
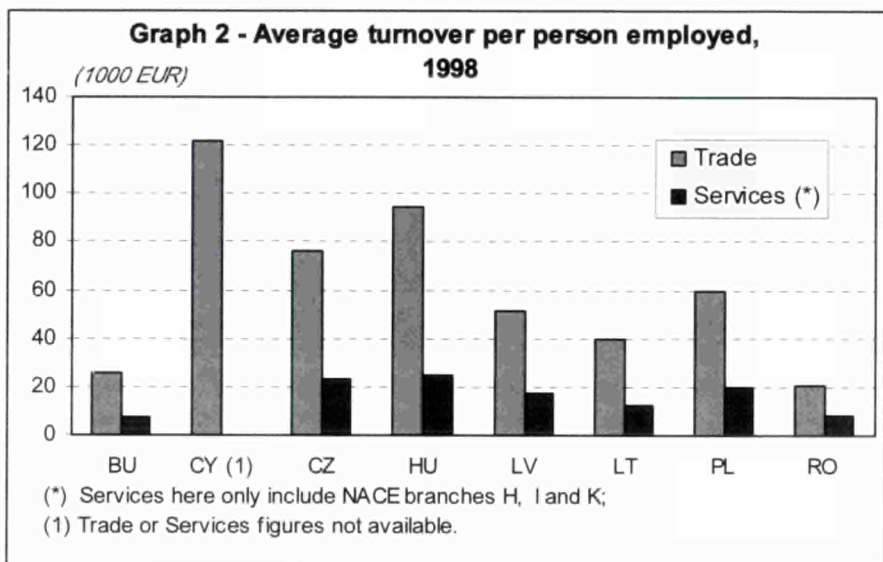
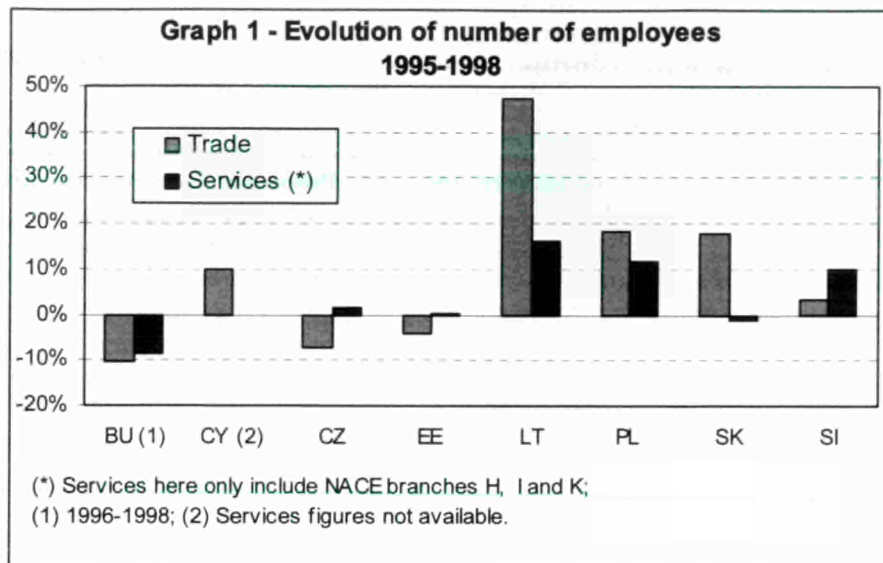
	Bulgaria	Cyprus	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovak Rep.	Slovenia
Hotels and restaurants	15.3	:	17.7	12.8	13.9	10.3	13.1	8.1	12.7	6.6	20.4
Transport, storage, communication	65.9	:	44.6	52.0	56.9	58.6	62.7	57.1	65.4	63.7	41.7
I60 Land transport; transport via pipelines	24.8	:	29.3	24.7	33.4	32.2	36.3	c	40.8	41.2	24.7
I61 Water transport	2.9	:	c	4.3	0.6	0.8	1.9	0.6	2.3	0.9	0.1
I62 Air transport	1.9	:	c	0.6	1.0	0.5	1.0	c	0.6	0.2	0.5
I63 Supporting and auxiliary transport activities; activities of travel agencies	19.9	:	3.4	11.3	4.1	12.9	8.8	5.5	6.0	2.3	7.9
I64 Post and telecommunications	16.5	:	11.0	11.1	17.8	12.3	14.7	c	15.7	19.1	8.5
K Real estate, renting, business activities	18.8	:	37.7	35.1	29.2	31.1	24.1	34.7	21.9	29.8	37.8
K70 Real estate activities	1.9	:	5.6	12.5	4.8	14.4	8.8	9.2	1.7	6.7	1.7
K71 Renting of machinery, equipment without operator, personal and household goods	0.3	:	0.6	0.9	0.7	0.7	0.5	0.5	0.3	0.3	0.4
K72 Computer and related activities	1.7	:	3.8	2.1	2.8	1.8	1.6	1.9	1.5	3.0	3.0
K73 Research and development	1.6	:	1.1	0.2	1.0	2.6	0.6	5.0	6.8	4.2	3.1
K74 Other business activities	13.3	:	26.5	19.5	20.0	11.5	12.6	18.1	11.5	15.6	29.7

(*) Services here only include NACE branches H, I and K.

Lithuania, Poland and Slovenia saw employment in both trade and services rise strongly up to 1998 (see graph 1). Employment in the trade sector in Cyprus and the Slovak Republic also rose strongly between 1995 and 1998, at 10% and 18% respectively. Lithuania's employment growth was the most impressive as the number of employees in the trade sector soared 47.2% over the three years and employment in its services sector (with the exception of financial intermediation) grew an impressive 16% over the same period. Bulgaria experienced a decrease of 10% and 8.5% respectively in its trade and services sectors between 1996 and 1998. The Czech Republic and Estonia also saw their trade workforce decline in the years to 1998, while these countries were able to keep services employment stable.

Significant differences in turnover levels between trade and services

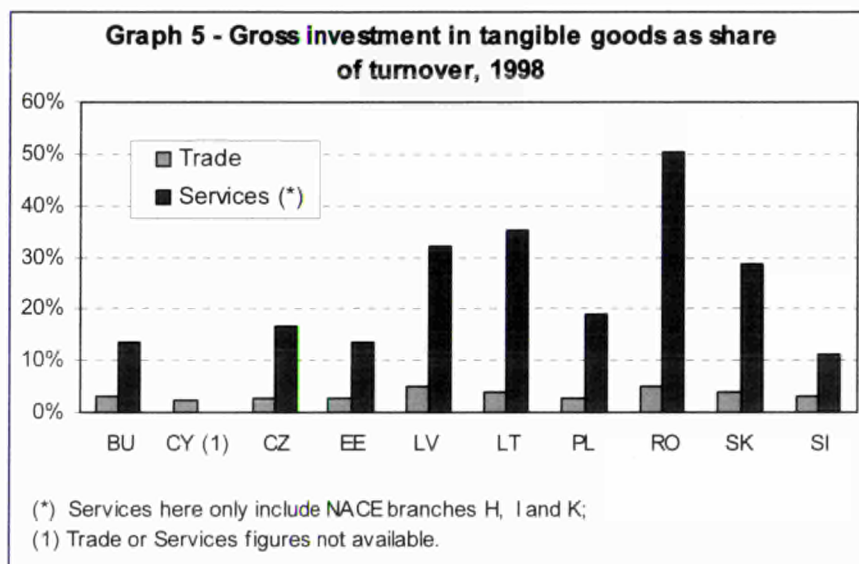
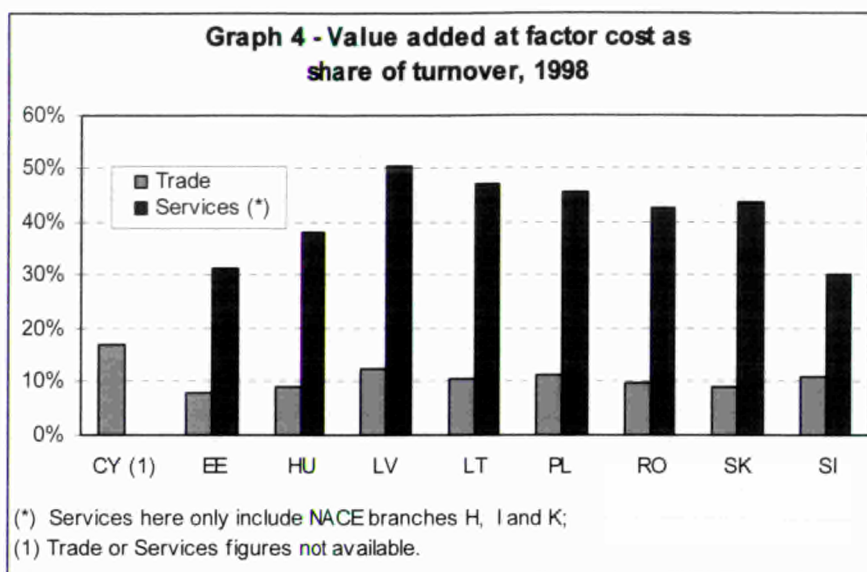
The average turnover per person employed in the trade sector is about three times as high as the one achieved within the services sector (see graph 2). Cyprus, the Czech Republic and Hungary all had turnover levels above 75 thousand EUR per head in 1998. Extra caution is needed when analysing Hungarian and Slovak figures as they are biased upwards as smaller companies are not covered in this survey (see methodological notes). Poland, Latvia and Lithuania also boasted healthy turnover figures per head of respectively 59, 52 and 40 thousand EUR. Within the services sector, average turnover per person employed varied within a much narrower range of 8 to 25 thousand EUR among the Central European candidate countries whose 1998 data were available.



Cyprus and Slovenia are the most expensive in terms of unit personnel costs

Unit personnel costs vary much less between the trade and services sectors in the candidate countries (see graph 3). They vary more widely between the different candidate countries. While Cypriot unit personnel costs in trade are the highest among the 11 covered applicant countries, Slovenia is the most expensive Central European candidate country in terms of unit personnel costs. It should be noted however that personnel costs for Slovenia also include payments for contract work by persons that are not included in the number of employees. Next most expensive are the Czech Republic, Hungary, Poland and the Slovak Republic. The Baltic States do not come far behind those four countries, while Bulgaria and Romania offer the lowest unit personnel costs of all 11 candidate countries covered.

Although trade beat services in average turnover per person employed, the former appears less profitable when one looks at value added at factor costs as a share of turnover (see graph 4). In the trade sector, Cyprus records as much as 17% of value added as share of turnover. The Central European candidate countries' trade sectors are clustered around a ratio of 10% of value added as share of turnover. In the services sector, the results were more diverse and much higher than in the trade sector in 1998. Results were scattered between a range of 30% to 51%. Latvia, Lithuania, Poland, Romania and the Slovak Republic notched up ratios of more than 40%. Hungary was positioned midway between this group and Estonia and Slovenia. Both these latter countries displayed ratios of value added to turnover hovering around 30% in the services sector.



Romania led trade and services sector investment in 1998

Gross investment in tangible goods as a share of turnover in the candidate countries' trade sector generally lay between 2% and 4% in 1998, whereas Latvia and Romania's ratio for this sector stood as high as 5% in that year (see graph 5). Even more eye-catching were the Romanian service sector investments in tangible goods for the same year, again enabling this country to show the highest percentage among the candidate countries (more than 50%). Latvia

and Lithuania's ratios for the same sector in 1998 were also high, at more than 30%. The majority of other Central European candidate countries whose data for this sector were available, recorded more moderate ratios, between 10% and 20%. Slovenia's services sector ratio of gross investment in tangible goods as share of turnover was the lowest, amounting to 11% in 1998. It should be noted however that this ratio is biased downwards for Slovenia as the gross investment in tangible goods variable does not entirely cover the same population as the turnover variable.

Table 6- Summary of the Basic SBS variables in 1998

	Number of enterprises	Number of persons employed	Number of employees	Turnover / person employed	Production Value	Turnover	Value added at factor cost	Gross operating surplus	Personnel costs	Gross investment	Apparent labour productivity	Unit personnel cost	Gross operating rate
	(1000)			(1000 EUR)	(Million EUR)						(1000 EUR)	(%)	
TRADE													
Bulgaria	104	312	185	25	1 435	7 922	:	:	233	241	:	1	:
Cyprus	:	52	43	121	1 591	6 368	1 072	463	609	148	20	14	7
Czech Rep.	223	705	493	76	11 087	53 694	:	:	2 575	1 466	:	5	:
Estonia	11	:	81	:	1 265	5 445	427	145	282	148	:	3	3
Hungary	13	245	241	95	5 469	23 267	2 102	:	1 123	:	9	5	:
Latvia	17	103	102	52	1 362	5 323	668	461	207	269	6	2	9
Lithuania	24	182	167	40	1 761	7 234	757	:	381	293	4	2	:
Poland	681	1980	1 021	59	24 133	117 783	13 358	:	4 361	3 127	7	4	:
Romania	222	1068	736	21	4 856	22 740	2 261	1 162	940	1 180	2	1	5
Slovak Rep.	1	:	78	:	2 201	9 120	826	462	365	344	:	5	5
Slovenia	34	:	99	:	4 300	13 029	1 419	:	1 089	407	:	11	:
SERVICES (*)													
Bulgaria	72	383	269	8	2 767	2 974	:	:	552	408	:	2	:
Cyprus	:	:	:	:	:	1 132	:	:	:	:	:	:	:
Czech Rep.	260	864	670	23	17 817	20 074	:	:	3 646	3 337	:	5	:
Estonia	7	:	94	:	2 292	2 454	767	:	438	335	:	5	:
Hungary	11	387	382	25	6 905	9 568	3 658	:	2 118	671	9	6	:
Latvia	8	123	123	18	2 191	2 182	1 104	669	435	703	9	4	31
Lithuania	10	149	143	13	1 834	1 906	896	:	508	671	6	4	:
Poland	431	1 693	1 158	20	31 335	33 260	15 133	:	7 110	6 253	9	6	:
Romania	36	742	620	8	5 770	5 990	2 563	:	1 590	3 017	3	3	:
Slovak Rep.	1	:	189	:	3 288	3 249	1 421	518	903	927	:	5	16
Slovenia	40	:	118	:	5 397	5 682	1 714	:	1 368	631	:	12	:

(*) Services here only include NACE branches H, I and K

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Database

This issue of Statistics in focus (SiF) is based on structural business statistics collected under the terms of Council Regulation (EC, EURATOM) No 58/97 of 20 December 1996. The reference data are stored in Eurostat's reference database NewCronos (Theme 4 -domain SBS – collection enterpr: annual enterprise statistics – dft file enter and cc).

The figures shown reflect the situation of the database as at 23 July 2002. No data are available for those countries that are not shown in the graphs and tables.

Symbols

Throughout the publication the sign ':' stands for 'Not available'; 'c' for 'confidential'.

Statistical classification

The data are collected according to the statistical classification of economic activities in the European Community (NACE Rev. 1).

This SiF deals with NACE branches G (Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods); H (Hotels and restaurants); I (Transport, storage and communication); K (Real estate, renting and business activities).

Methodological remarks

The candidate countries' data used in this SiF are expressed in current ECU/EUR. This means that the figures in ECU/EUR in this document do not fully reflect these countries' currency volatility, inflation rates and purchasing power.

Also, as mentioned throughout the text, there are still a number of discrepancies between the various candidate countries regarding the statistical population covered as well as the methodologies:

Statistical population: units and size coverage

Hungary: only enterprises with 5 persons employed or more are covered.

Poland: trade figures are provisional (1998)

Slovak Republic: Population covered is enterprises with 20 persons or more employed and enterprises with fewer than 20 persons employed which were considered statistically important, based on expert judgment (1995 and 1996) or with a turnover larger than EURO 2.3 million (from 1997 onwards)

SBS variables (Structural Business Statistics)

Apparent labour productivity

Apparent labour productivity is defined as value added (at factor cost) per person employed.

Gross operating rate

Gross operating rate is defined as gross operating surplus/ turnover.

Gross operating surplus

Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the personnel costs. It is the balance available to the unit which allows it to recompense the providers of own funds and debt, to pay taxes and eventually to finance all or a part of its investment.

Gross investment in tangible goods

Investment during the reference period in all tangible goods. Included are new and existing tangible capital goods, whether bought from third parties or produced for own use (i.e. capitalised production of tangible capital goods), having a useful life of more than one year, including non-produced tangible goods such as land.

Number of employees

The number of employees is defined as those persons who work for an

employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind.

Number of enterprises

A count of the number of enterprises registered to the population concerned in the business register corrected for errors, in particular frame errors. Dormant units are excluded.

Number of persons employed

The total number of persons who work in the observation unit (employees receiving remuneration, working proprietors and unpaid family workers) as well as outside working persons who belong to the unit and are paid by it. It includes all persons who are on the payroll of the enterprise, whether they are temporarily absent (excluding long-term absences), part-time, seasonal or home workers, apprentices etc. The number of persons employed excludes manpower supplied to the unit by other enterprises and persons carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises.

Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Production value

The production value measures the amount actually produced by the unit, based on sales, including changes in stocks and the resale of goods and services. The production value is defined as turnover, plus or minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalised production, plus other operating income (excluding subsidies). Income and expenditure classified as financial or extraordinary in company accounts is excluded from production value. Included in purchases of goods and services for resale are the purchases of services purchased in order to be rendered to third parties in the same condition.

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

Unit personnel costs

Unit personnel costs are defined as personnel costs per employee.

Value added (at factor cost)

Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes.

The above SBS variables are laid down by Commission Regulation (EC) No. 2700/98 of 17 December 1998.

More information on business statistics methodology:

<http://europa.eu.int/comm/eurostat/ramon/>

or

http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html

The above-mentioned regulations and statistical classification can be downloaded under 'legal texts'

Further information:

Databases

New Cronos, Domain SBS

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

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