



20 TRGOVINA IN DRUGE STORITVENE DEJAVNOSTI
DISTRIBUTIVE TRADE AND OTHER SERVICE ACTIVITIES

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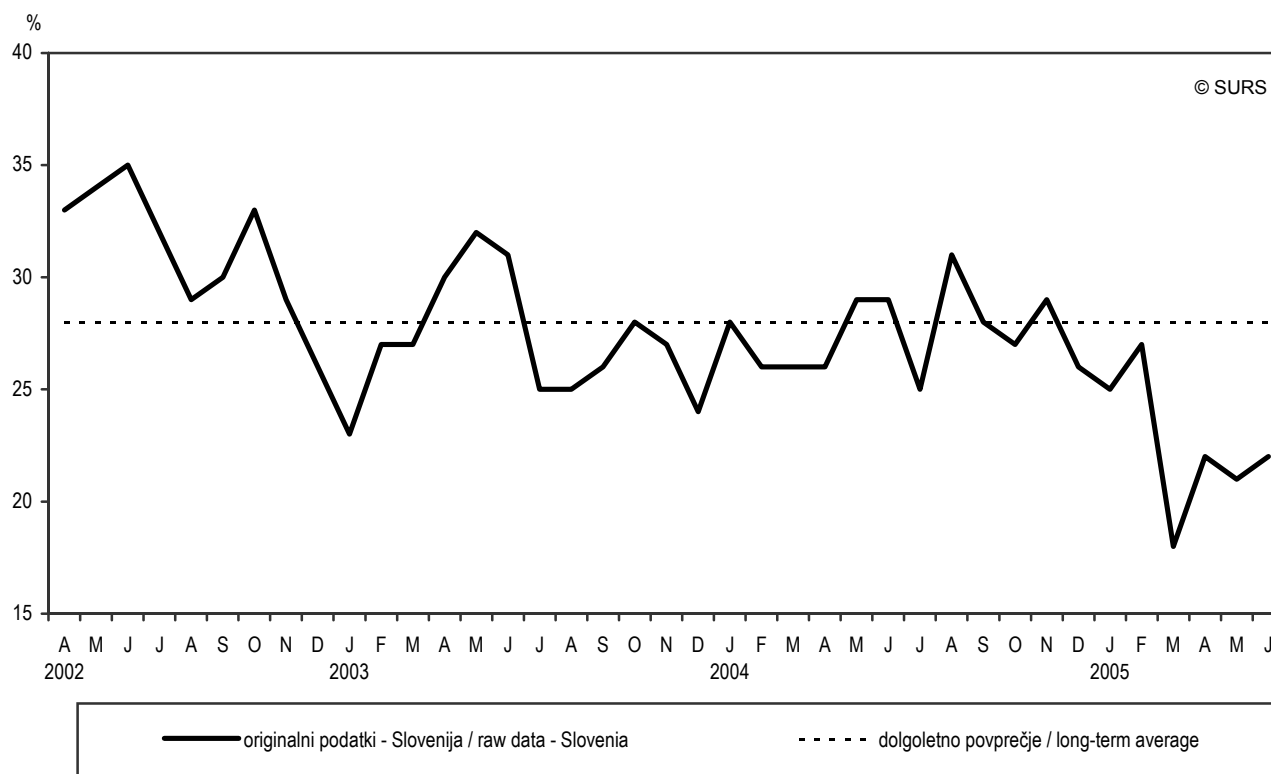
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, JUNIJ 2005

BUSINESS TENDENCY IN SERVICES, SLOVENIA, JUNE 2005

- ▶ V juniju 2005 je bil zabeležen rahel vzpon kazalca zaupanja v storitvenih dejavnostih v primerjavi s stanjem v preteklem mesecu, in sicer za 1 odstotno točko. V primerjavi z junijem 2004 je kazalec padel za 7 odstotnih točk in v primerjavi z lanskim povprečjem za 6 odstotnih točk.
- ▶ Na dvig kazalca zaupanja v storitvenih dejavnostih sta vplivali predvsem oceni o izboljšanju *sedanjega poslovnega položaja* in *sedanjega povpraševanja*, medtem ko je bila za *pričakovano povpraševanje* zabeležena ocena o poslabšanju.
- ▶ Vsi kazalci stanj so se izboljšali. Kazalci pričakovanj so se poslabšali (pričakovano povpraševanje), izboljšali (pričakovane prodajne cene) oz. ostali nespremenjeni (pričakovano zaposlovanje).
- ▶ In June 2005 a slight rise of the service confidence indicator was registered in comparison with the previous month, namely by 1 percentage point. Compared to June 2004 it fell by 7 percentage points and compared to last year's average by 6 percentage points.
- ▶ The rise of the services confidence indicator was mostly driven by an improvement in the assessment of the *present business situation* and *present demand*, while the assessment of the *expected demand* worsened.
- ▶ All situation indicators improved. Expectation indicators worsened (expected demand), improved (selling prices expectations), as well as remained unchanged (expected employment).

1. KAZALEC ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 – JUNIJ 2005

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 – JUNE 2005



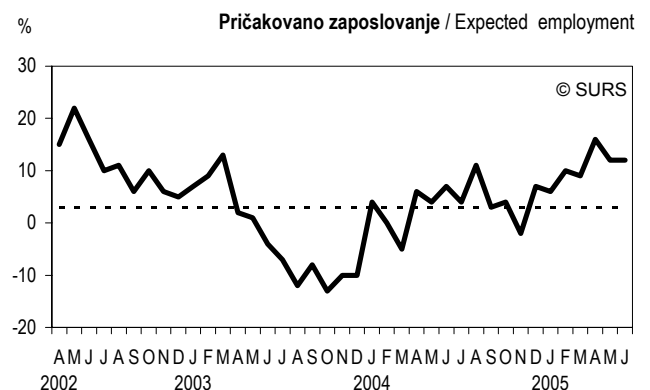
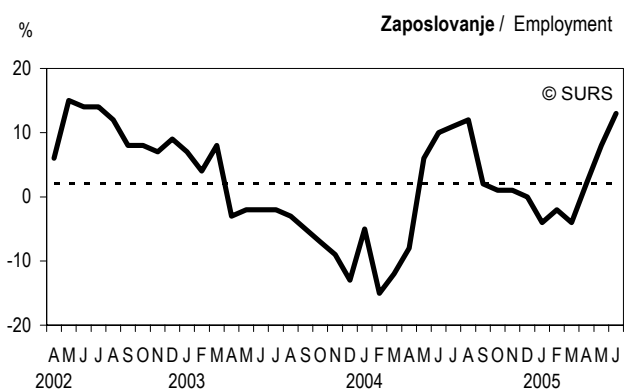
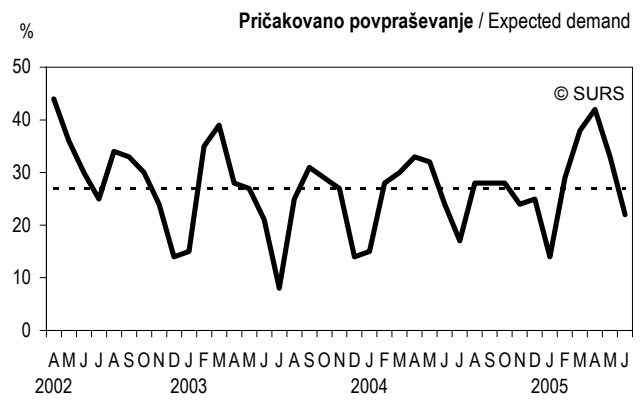
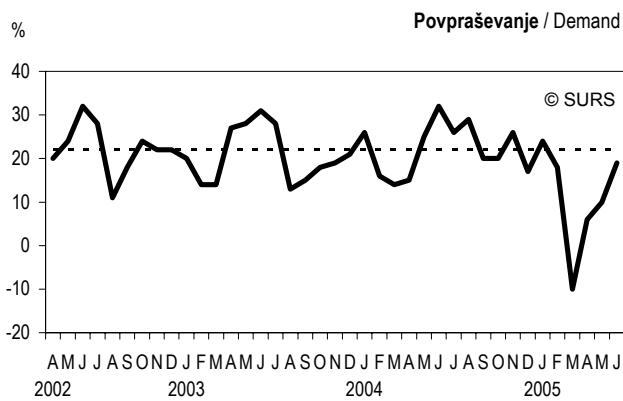
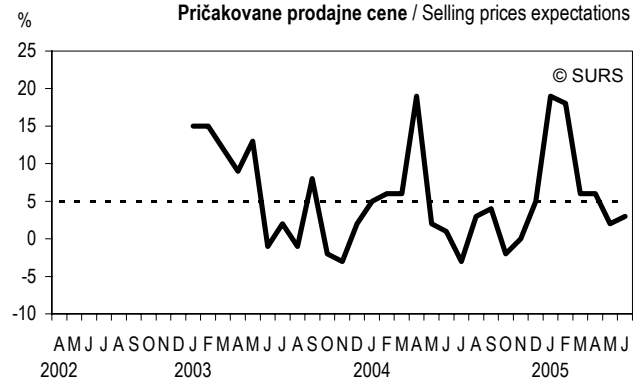
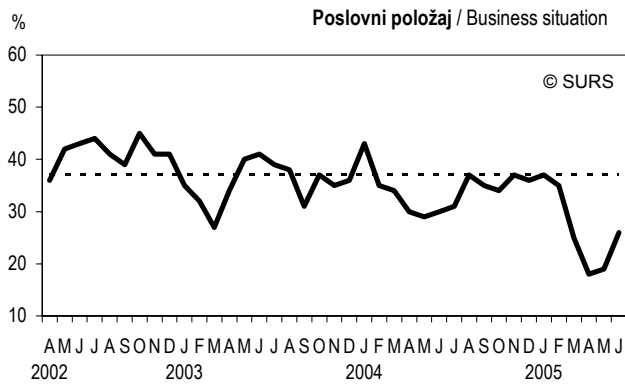
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju. The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

2. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V SLOVENIJI, APRIL 2002 – JUNIJ 2005

EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN SLOVENIA, APRIL 2002 - JUNE 2005

Ocena stanja / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— storitvene dejavnosti services
- - - - - dolgoletno povprečje long-term average

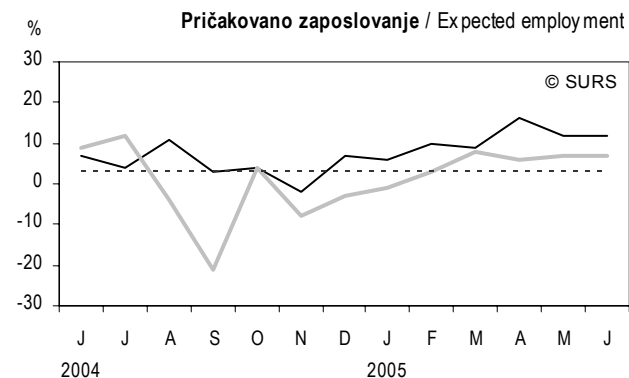
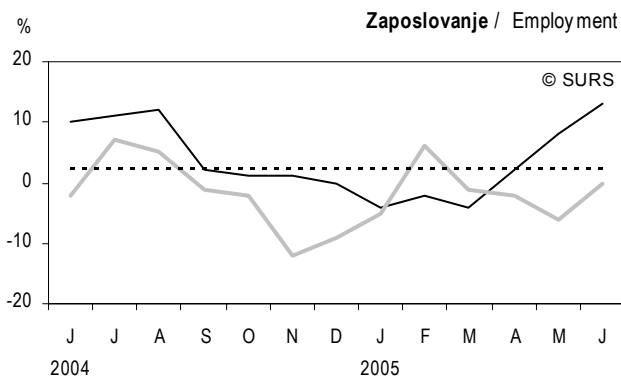
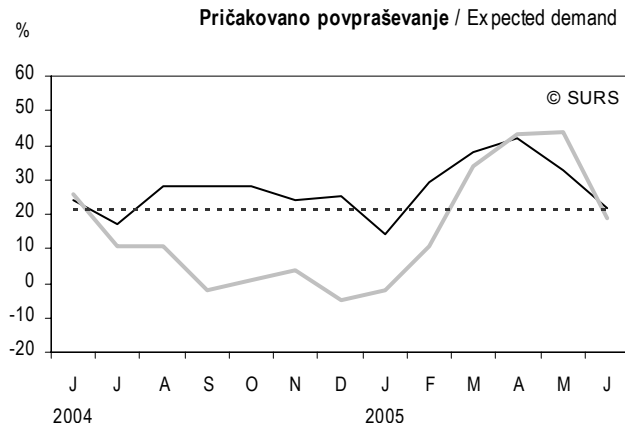
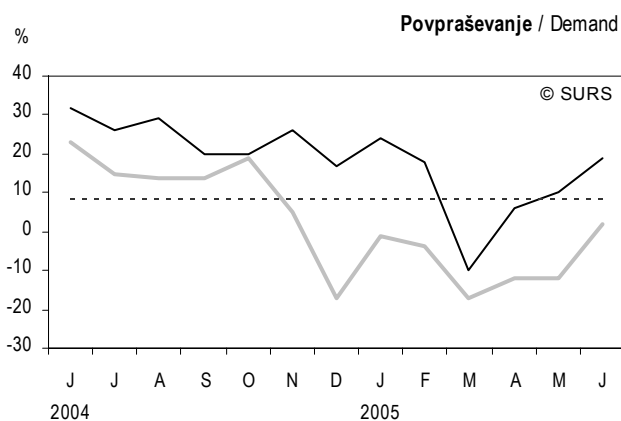
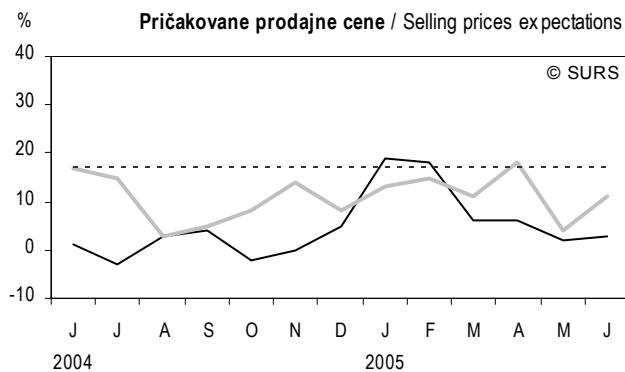
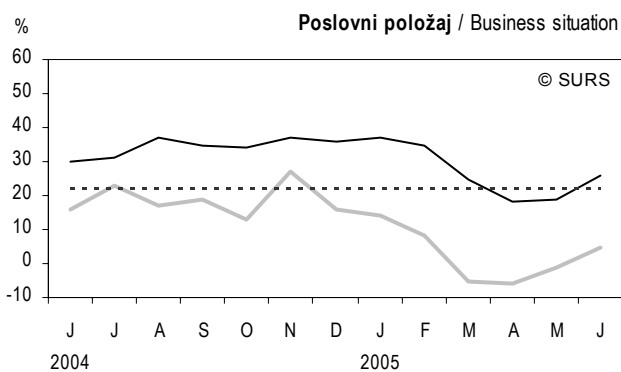


2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, junij 2004 - junij 2005

Evolution of economic indicators in hotels and restaurants and in tourist assistance activities, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— gostinstvo in s turizmom povezane dejavnosti
hotels and restaurants, and tourist assistance activities

— storitvene dejavnosti
services

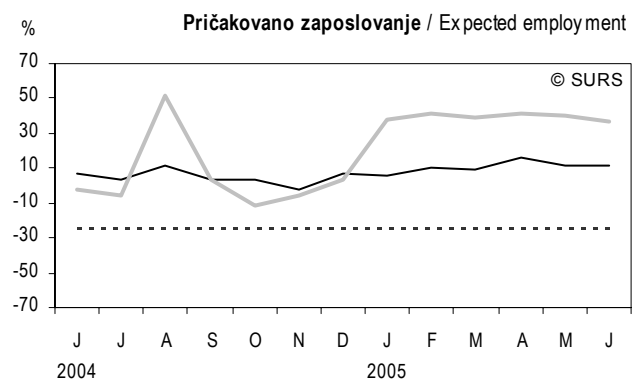
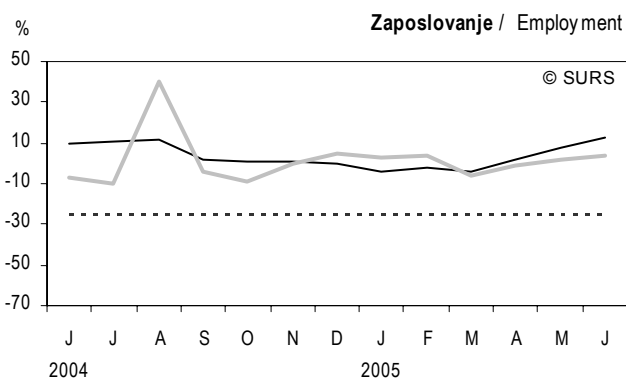
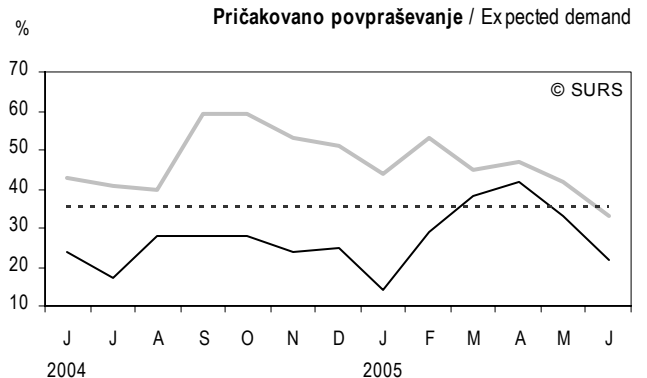
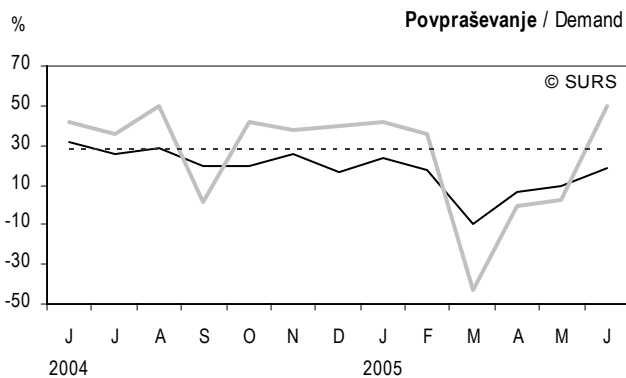
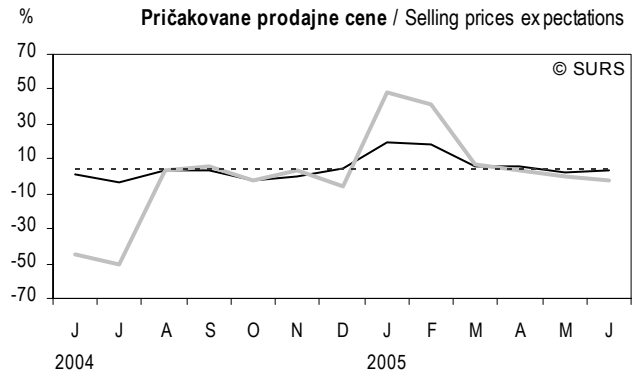
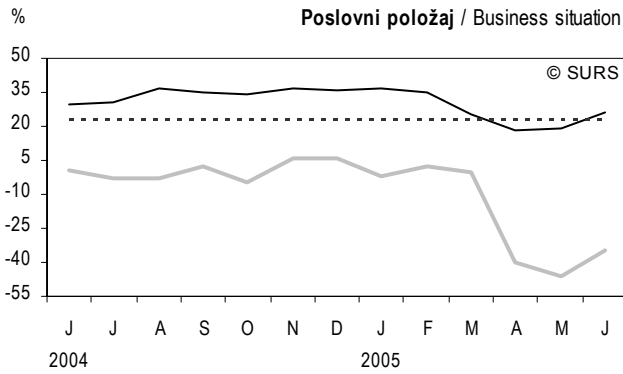
- - - dolgoletno povprečje
long-term average

2.2 Gibanje ekonomskih kazalcev v kopenskem, vodnem in zračnem prometu, junij 2004 - junij 2005

Evolution of economic indicators in land, water and air transport, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



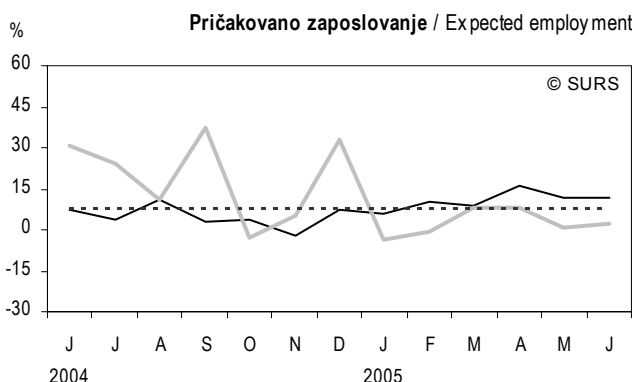
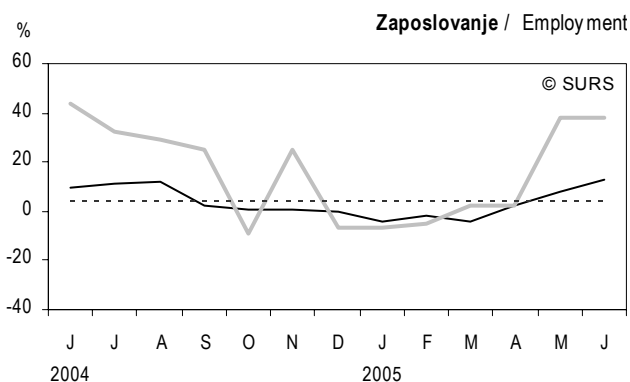
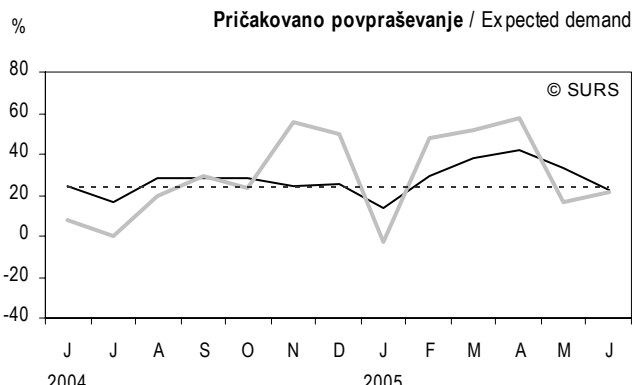
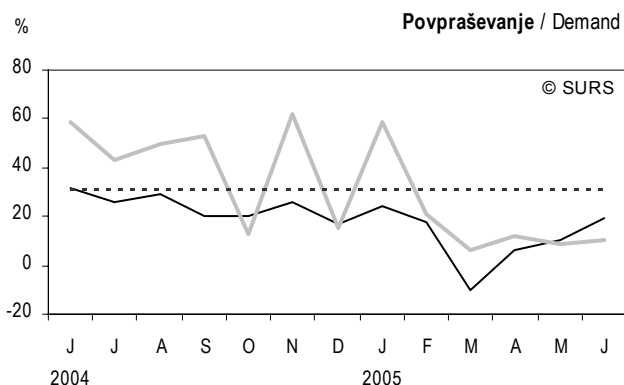
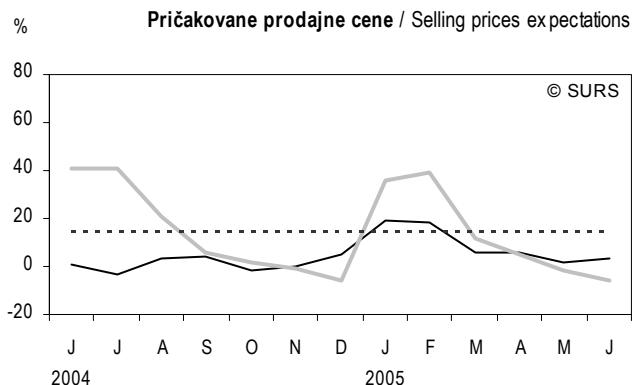
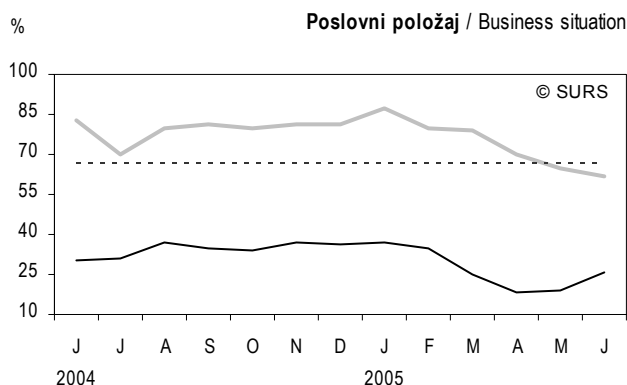
— kopenski, vodni in zračni promet land, water and air transport	— storitvene dejavnosti services	- - - - dolgoletno povprečje long-term average
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2.3 Gibanje ekonomskih kazalcev za dejavnost pošte, telekomunikacij in obdelava podatkov, junij 2004 - junij 2005

Evolution of economic indicators in post and telecommunication and in data processing, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



pošta, telekomunikacije in obdelava podatkov
 post and telecommunication, data processing

storitvene dejavnosti
 services

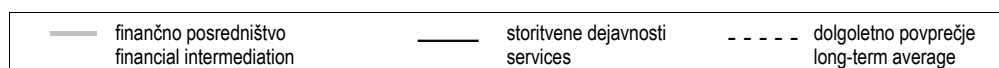
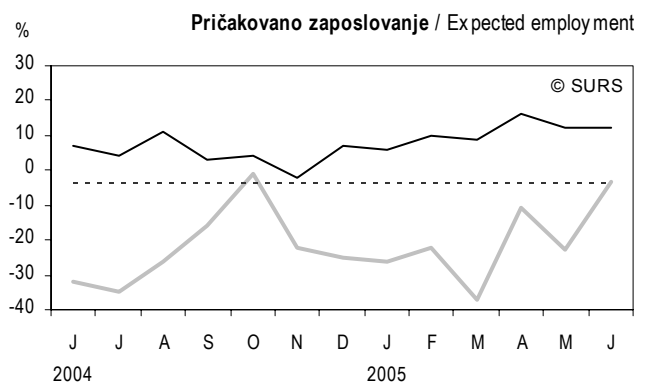
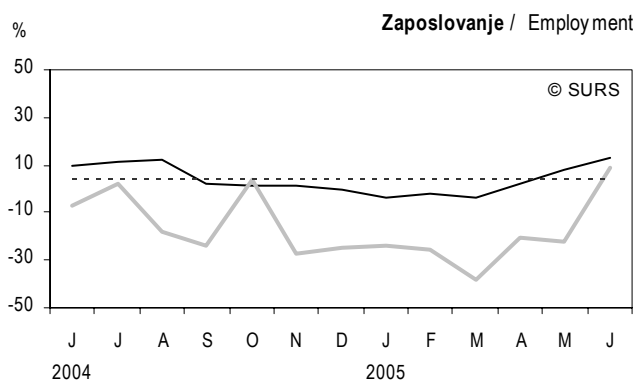
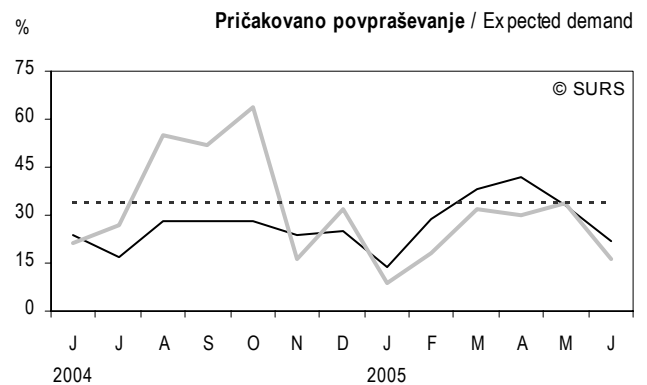
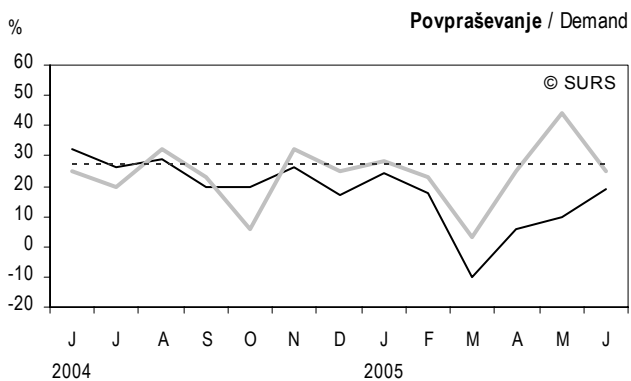
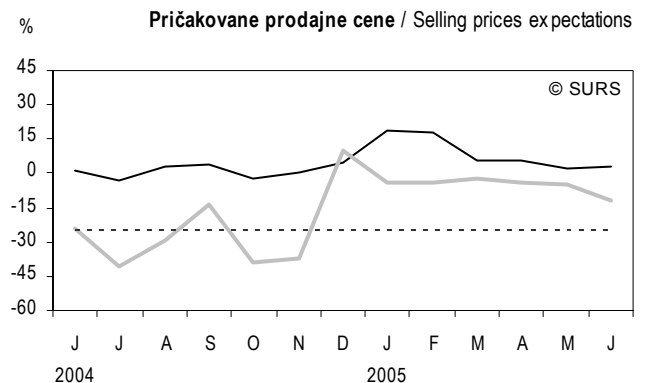
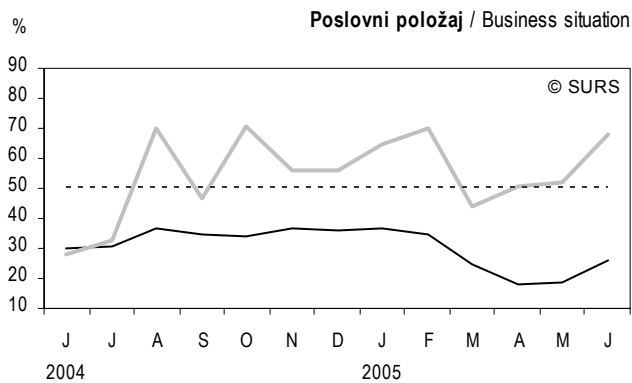
dolgoletno povprečje
 long-term average

2.4 Gibanje ekonomskih kazalcev za dejavnost finančno posredništvo, junij 2004 - junij 2005

Evolution of economic indicators in financial intermediation, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months

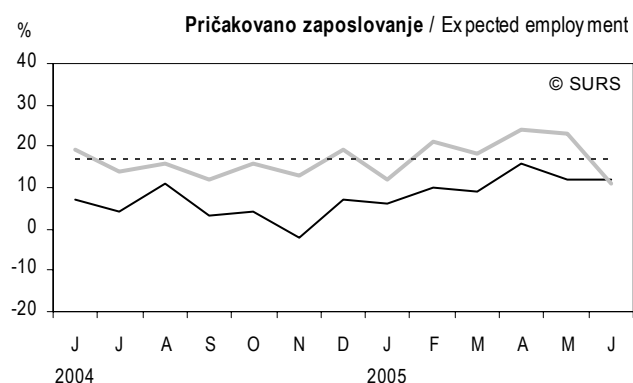
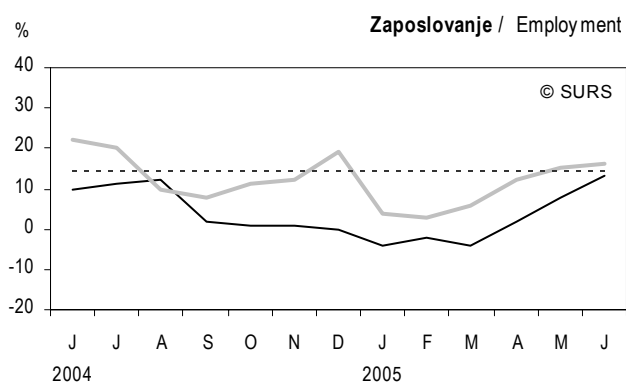
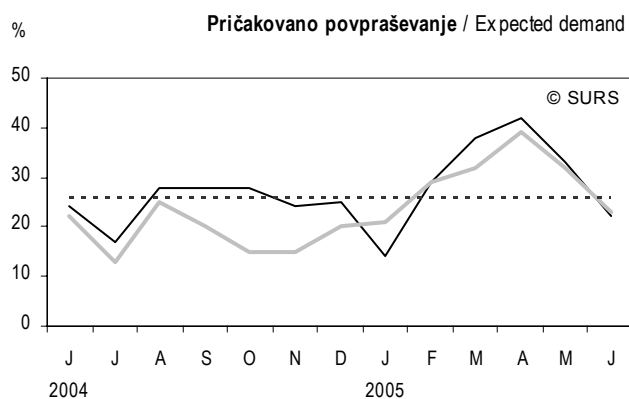
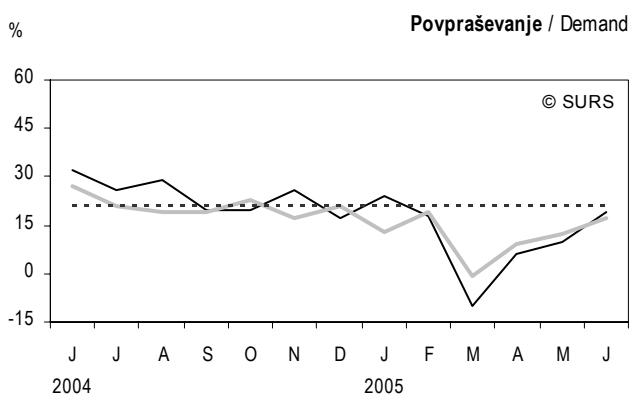
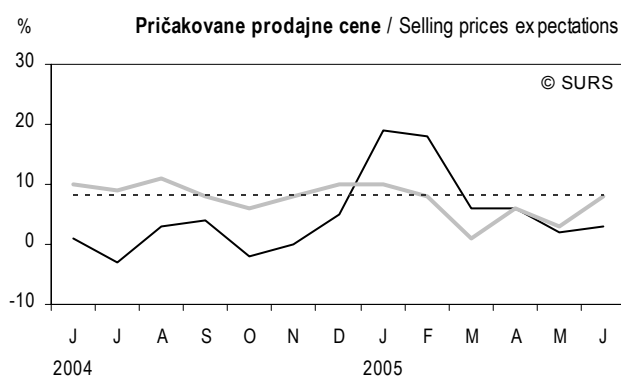
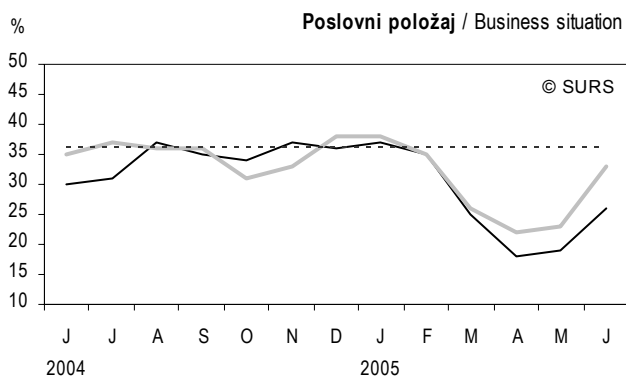


2.5 Gibanje ekonomskih kazalcev za dejavnost poslovanje z nepremičninami, najem in poslovne storitve, junij 2004 - junij 2005

Evolution of economic indicators in real estate activities, renting and business services, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— poslovanje z nepremičninami, najem in poslovne storitve
real estate activities, renting and business services

— storitvene dejavnosti
services

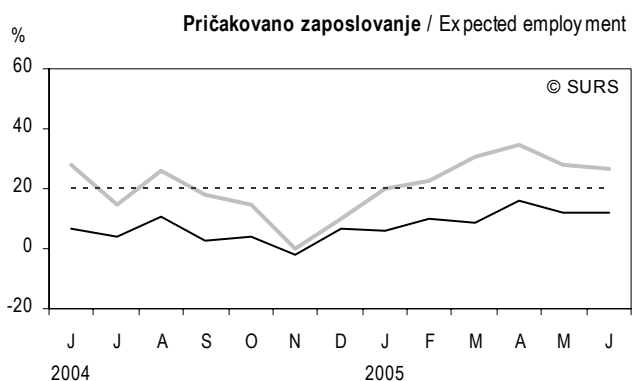
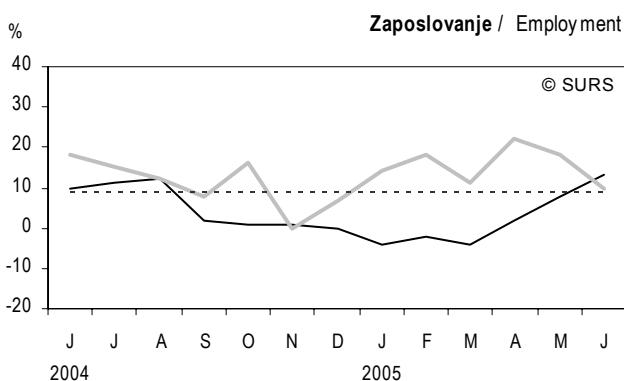
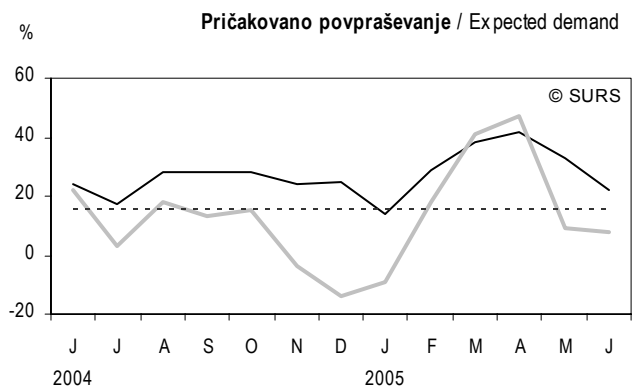
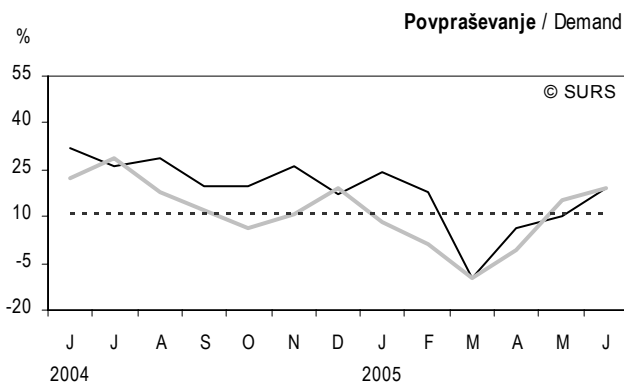
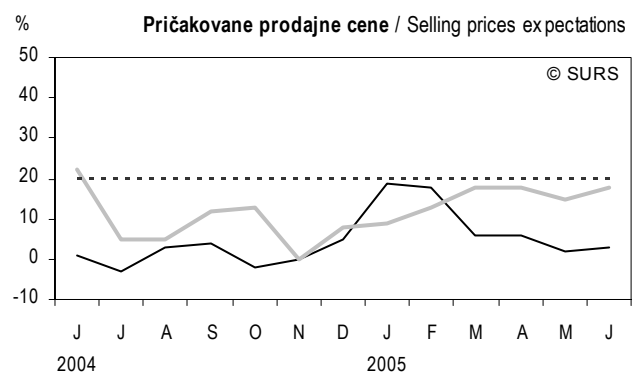
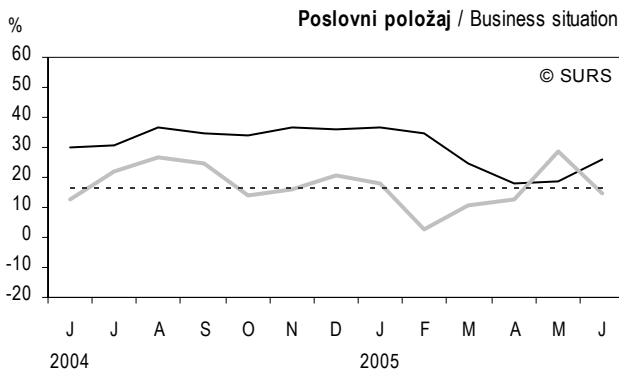
- - - - - dolgoletno povprečje
long-term average

2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, junij 2004 - junij 2005

Evolution of economic indicators in sewage disposal and other service activities, June 2004 - June 2005

Ocena stanj / Appreciation of situation

Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



— dejavnost javne higiene in druge osebne storitvene dejavnosti
sewage disposal and other service activities

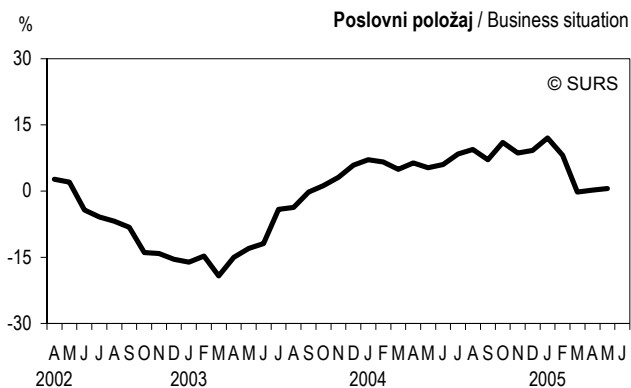
— storitvene dejavnosti
services

- - - dolgoletno povprečje
long-term average

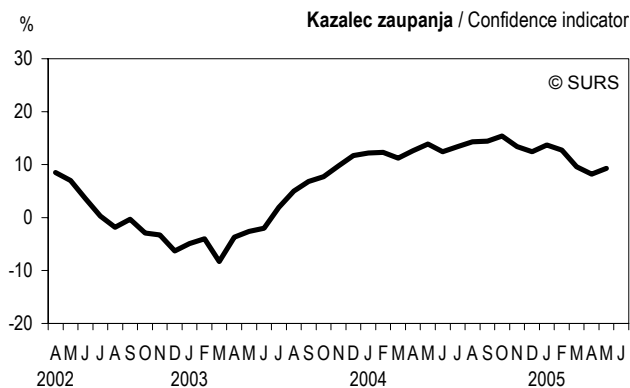


3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU¹⁾, APRIL 2002 - JUNIJ 2005 EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN EU¹⁾, APRIL 2002 - JUNE 2005

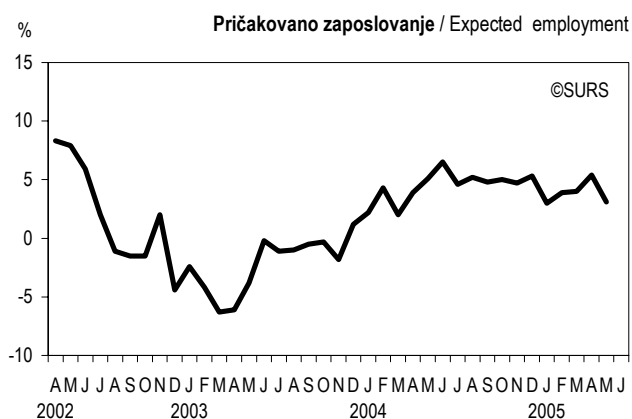
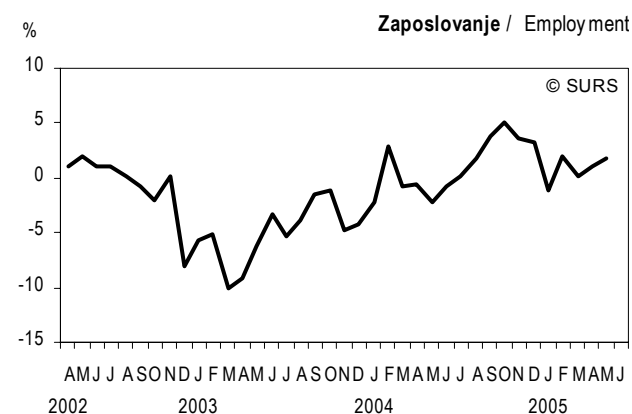
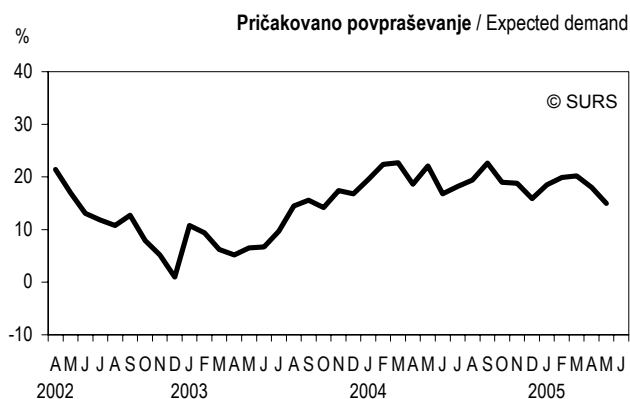
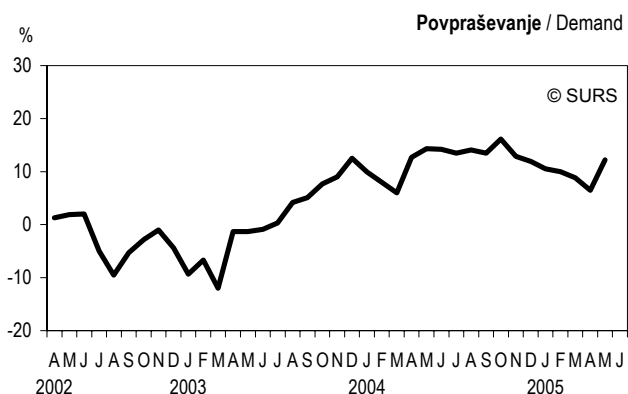
Ocena stanj / Appreciation of situation



Kazalec zaupanja / Confidence indicator



Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



1) Vir podatkov za EU je Evropska komisija (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Podatki so sezonsko prilagojeni. Podatki za zadnji mesec niso na voljo.

Data source for EU is the European Commission (http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Data are seasonally adjusted. Data for the last month are not available.

METODOLOŠKA POJASNILA**Namen raziskovanja**

Namen kvalitativne Ankete o poslovnih tendencah v storitvenih dejavnostih (vprašalnik PA-STOR) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati ankete so osnova za izračun kazalca zaupanja v storitvenih dejavnostih.

Panelno anketo o poslovnih tendencah v storitvenih dejavnostih izvajamo v Sloveniji od aprila 2002 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kakor jo izvajajo v državah članicah Evropske unije že več desetletij; to omogoča neposredno primerljivost podatkov.

Enote opazovanja

Opazujemo podjetja, ki so po Standardni klasifikaciji dejavnosti (SKD) razvrščena v storitveno dejavnost, in sicer:

- 55 – Gostinstvo
- 60 – Kopenski promet; cevovodni transport
- 61 – Vodni promet
- 62 – Zračni promet
- 63.3 – Dejavnost potovalnih agencij in organizatorjev potovanj; s turizmom povezane dejavnosti
- 64 – Pošta in telekomunikacije
- 65 – Finančno posredništvo, razen zavarovalništva in dejavnosti pokojninskih skladov
- 66 – Zavarovalništvo in dejavnost pokojninskih skladov, razen obveznega socialnega zavarovanja
- 67 – Pomožne dejavnosti v finančnem posredništvu
- 70 – Poslovanje z nepremičninami
- 71 – Dajanje strojev in opreme brez upravljavcev v najem; izposojanje izdelkov široke porabe
- 72 – Obdelava podatkov, podatkovne baze in s tem povezane dejavnosti
- 73 – Raziskovanje in razvoj
- 74 – Druge poslovne dejavnosti
- 90 – Dejavnosti javne higiene
- 93 – Druge storitvene dejavnosti

Vzorec podjetij je oblikovan na podlagi dveh meril:

- razvrstitve storitvenega podjetja po SKD-ju in
- velikosti storitvenega podjetja (števila zaposlenih po Zakonu o gospodarskih družbah).

Vir podatkov

Na vprašalnik PA-STOR odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu.

METHODOLOGICAL EXPLANATIONS**Purpose of the survey**

The purpose of the qualitative Survey on Business Tendency in Services (questionnaire PA-STOR) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The survey results are the basis for evaluation of the confidence indicator in services.

The Panel Survey on Business Tendency in Services is being carried out in Slovenia since April 2002 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

Observation units

We are monitoring units that are registered in services according to the Standard Classification of Activities (SKD):

- 55 – Hotels and restaurants
- 60 – Land transport; transport via pipelines
- 61 – Water transport
- 62 – Air transport
- 63.3 – Activities of travel agencies and tour operators; tourist assistance activities
- 64 – Post and telecommunications
- 65 – Financial intermediation, except insurance and pension funding
- 66 – Insurance and pension funding, except compulsory social security
- 67 – Activities auxiliary to financial intermediation
- 70 – Real estate activities
- 71 – Renting of machinery and equipment without operator and of personal and household goods
- 72 – Data processing, database activities and other computer related activities
- 73 – Research and development
- 74 – Other business activities
- 90 – Sewage and refuse disposal, sanitation and similar activities
- 93 – Other service activities

The sample of enterprises was selected by two criteria:

- classification of the enterprise according to the Standard Classification of Activities,
- size of the enterprise (the number of employees in accordance with the Companies Act).

Data source

Respondents answering the monthly PA-STOR questionnaire are managers of enterprises or other executives. They respond between the 1st and the 10th of the month.



Zajetje

V panelni vzorec smo zajeli vsa velika in srednjevelika podjetja ter 11 % malih podjetij (ali 16 % zaposlenih v malih podjetjih), ki so razvrščena v storitveno dejavnost. Panelni vzorec pokriva 18 % podjetij vzorčnega okvira ali 69 % zaposlenih v storitvenih dejavnostih.

Način zbiranja podatkov

Anketo izvajamo mesečno po pošti.

Definicije in pojasnila

Ravnotežje je razlika med pozitivnimi in negativnimi odgovori, izraženimi v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih kazalcev (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalcev. Grafikon prikazuje ravnotežja po posameznih vprašanjih.

Kazalec zaupanja v storitvenih dejavnostih je povprečje odgovorov (ravnotežij) na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju po storitvah.

Objavljanje

Sodelujoči v anketi prejmejo mesečno informacijo o storitvenih dejavnostih.

Drugim uporabnikom so ti podatki prav tako dostopni na ravni storitvenih dejavnosti. Objavljamo jih mesečno v Statističnih informacijah in podatkovni bazi SI-STAT (<http://www.stat.si>).

VPRAŠANJA

Poslovni položaj v zadnjih 3 mesecih: dober, zadovoljiv, slab?

Povpraševanje v zadnjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Zaposlovanje v zadnjih treh mesecih: povečalo, ostalo enako, padlo?

Povpraševanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Zaposlovanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?

Prodajne cene v naslednjih 3 mesecih: zvišale, ostale enake, znižale?

Coverage

The panel includes all large and medium-sized enterprises and 11% of small enterprises (or 16% employees of small enterprises), the principal activity of which is classified into services. The panel covers 18% of the enterprises of the studied population or 69% of employees in services.

Method of data collection

The survey is carried out monthly by mail.

Definitions and explanations

The balance is the difference between positive and negative answers, expressed in percent. The balance shows the movement of observed economic indicators (present situation and future expectations), and not the real size of economic indicators. The charts show the balance by individual questions.

The confidence indicator in services is the arithmetic mean of responses (balances) to the questions on business situation, and present and expected demand.

Publishing

Participants in the survey get the monthly information on services.

Other users can also get data for services published monthly in Rapid Reports and in the SI-STAT database (<http://www.stat.si/eng>).

QUESTIONS

Business situation over the past 3 months: improved, remained unchanged, deteriorated?

Demand over the past 3 months: increased, remained unchanged, decreased?

Employment over the past 3 months: increased, remained unchanged, decreased?

Demand over the next 3 months: increase, remain unchanged, decrease?

Employment over the next 3 months: increase, remain unchanged, decrease?

Prices over the next 3 months: increase, remain unchanged, decrease?

KOMENTAR

V juniju 2005 je bil zabeležen rahel vzpon kazalca zaupanja v storitvenih dejavnostih v primerjavi s stanjem v preteklem mesecu, in sicer za 1 odstotno točko. V primerjavi z junijem 2004 je kazalec padel za 7 odstotnih točk in v primerjavi z lanskim povprečjem za 6 odstotnih točk.

POSLOVNI POLOŽAJ

V primerjavi s prejšnjim mesecem se je poslovni položaj v zadnjih treh mesecih izboljšal, saj je bil ta kazalec višji za 7 odstotnih točk. Glede na isti mesec lanskega leta in glede na lansko povprečje je kazalec padel za 4 odstotne točke oziroma 8 odstotnih točk.

POVPRAŠEVANJE

V zadnjih 3 mesecih se je povpraševanje po storitvah povečalo in kazalec sedanje povpraševanje se je glede na pretekli mesec zvišal za 9 odstotnih točk. Glede na isti mesec lanskega leta je kazalec padel za 13 odstotnih točk in za 3 odstotne točke glede na lanskoletno povprečje. Po drugi strani pa so bili direktorji zelo pesimistični glede gibanja povpraševanja v naslednjih treh mesecih, saj se je kazalec pričakovanega povpraševanja poslabšal v vseh treh primerjavah. V primerjavi z majem 2005 je le-ta padel za 11 odstotnih točk, glede na junij 2004 za 2 odstotni točki in glede na lansko povprečje za 4 odstotne točke.

ZAPOSLOVANJE

V juniju 2005 so direktorji ocenili, da se je zaposlovanje v zadnjih 3 mesecih povečalo. Kazalec zaposlovanja je bil namreč za 5 odstotnih točk višji kot prejšnji mesec, v primerjavi z istim mesecem lanskega leta za 3 odstotne točke in je bil za 13 odstotnih točk nad lanskim povprečjem. Kazalec pričakovanega zaposlovanja kaže, da se zaposlovanje (glede na maj 2005) v naslednjih treh mesecih ne bo spremenilo. V primerjavi z istim mesecem lani in z lanskim povprečjem je bil ta kazalec višji za 5 oziroma 8 odstotnih točk.

PRODAJNE CENE

Direktorji so v juniju 2005 ocenili, da se bodo v naslednjih treh mesecih prodajne cene v storitvenih dejavnostih zvišale, saj je bil ta kazalec višji za 1 odstotno točko v primerjavi s preteklim mesecem in za 2 odstotni točki v primerjavi z junijem 2004. V primerjavi z lanskim povprečjem pa se je znižal za 1 odstotno točko.

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COMMENT

In June 2005 a slight rise of the service confidence indicator was registered in comparison with the previous month, namely by 1 percentage point. Compared to June 2004 it fell by 7 percentage points and compared to last year's average by 6 percentage points.

BUSINESS SITUATION

The business situation in the past three months improved as this indicator went up by 7 percentage points in comparison with the previous month. Compared to June 2004 and to last year's average it went down, i.e. by 4 and 8 percentage points, respectively.

DEMAND

In the past three months demand for services grew while the indicator of the present demand rose by 9 percentage points compared to the previous month. Compared to June 2004 it dropped by 13 percentage points and compared to last year's average by 3 percentage points. On the other hand, managers were very pessimistic about the demand developments in the next three months as the expected demand indicator worsened in all three comparisons. Compared to May 2005 it fell by 11 percentage points, compared to June 2004 by 2 percentage points and compared to last year's average by 4 percentage points.

EMPLOYMENT

According to managers' estimates in June 2005, employment increased in the past three months. The employment indicator was namely 5 percentage points higher than in the previous month, 3 percentage points higher than in June 2004 and it was 13 percentage points above last year's average. According to the expected employment indicator, the employment will remain the same in the next three months - if compared with the previous month. Compared to June 2004 and to last year's average the indicator was higher by 5 and 8 percentage points, respectively.

SELLING PRICES

In June 2005 managers estimated that selling prices in the next three months will rise as this indicator went up by 1 percentage point in comparison with previous month and by 2 percentage points in comparison with June 2004 but it was down by 1 percentage point compared to last year's average.

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