



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

št./No 55

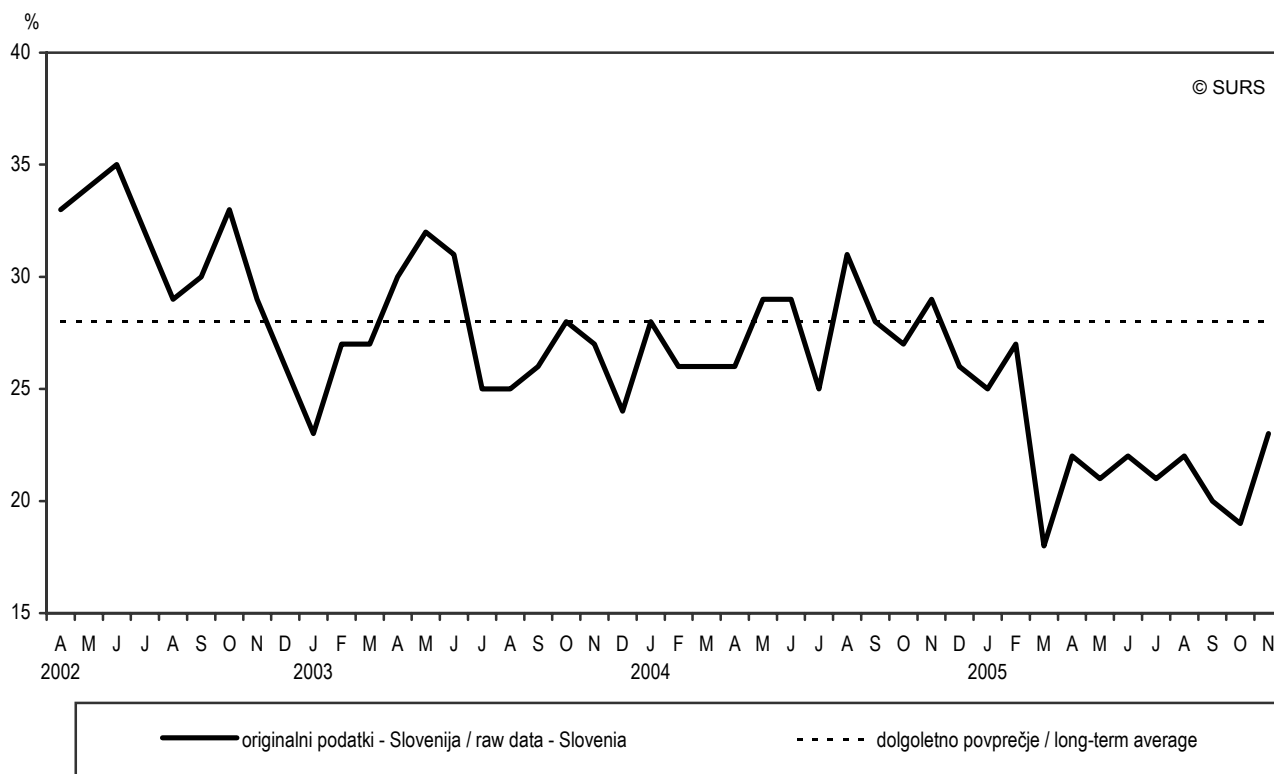
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, NOVEMBER 2005

BUSINESS TENDENCY IN SERVICES, SLOVENIA, NOVEMBER 2005

- ▶ V novembru 2005 so direktorji ocenili tendence boljše kot pretekli mesec. Kazalnik zaupanja je bil 4 odstotne točke višji v primerjavi s stanjem v preteklem mesecu. V primerjavi z novembrom 2004 in v primerjavi z lanskim povprečjem pa je kazalec padel za 6 oz. 5 odstotnih točk.
- ▶ Na rast kazalnika zaupanja v storitvenih dejavnostih je vplival predvsem kazalnik povpraševanja.
- ▶ Kazalniki stanj in pričakovanj so se v primerjavi s preteklim mesecem izboljšali, razen kazalnika poslovnega položaja.
- ▶ In November 2005, managers estimated business tendencies in services better than in the previous month. Compared to the previous month the confidence indicator was up by 4 percentage points. Compared to November 2004 and to last year's average it fell by 6 and 5 percentage points, respectively.
- ▶ The improvement of the services confidence indicator was mostly driven by the increase of the demand indicator.
- ▶ The observed indicators for appreciation of the situation increased compared to the previous month, except the business situation indicator.

1. KAZALNIK ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 – NOVEMBER 2005

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 – NOVEMBER 2005



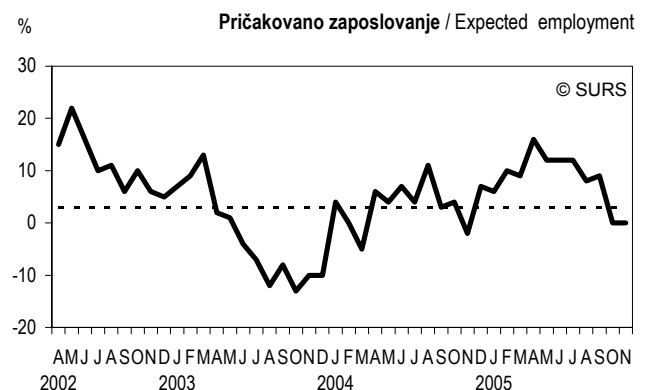
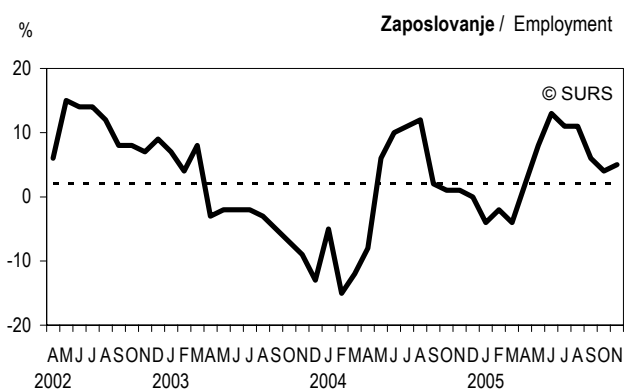
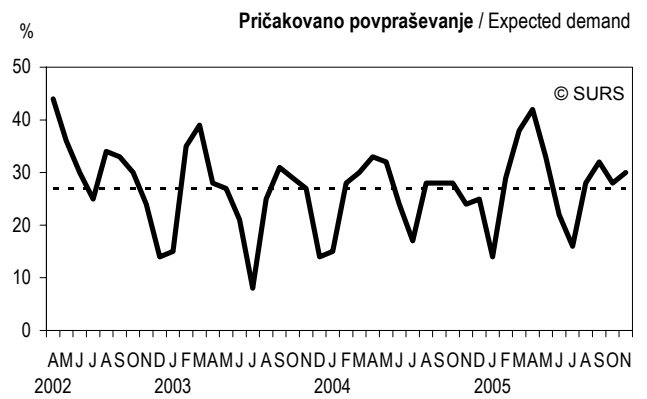
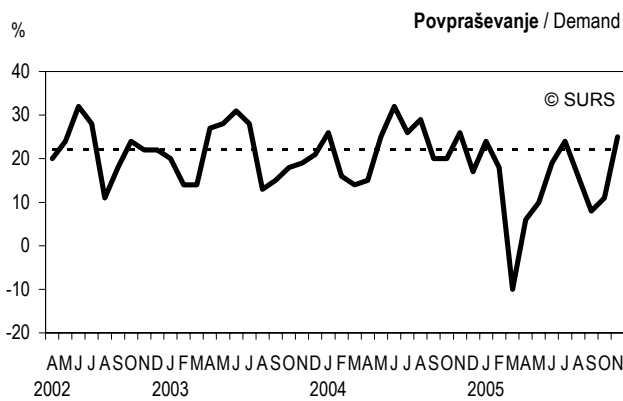
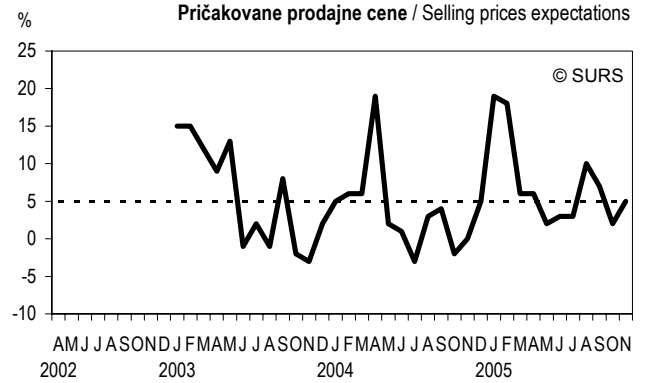
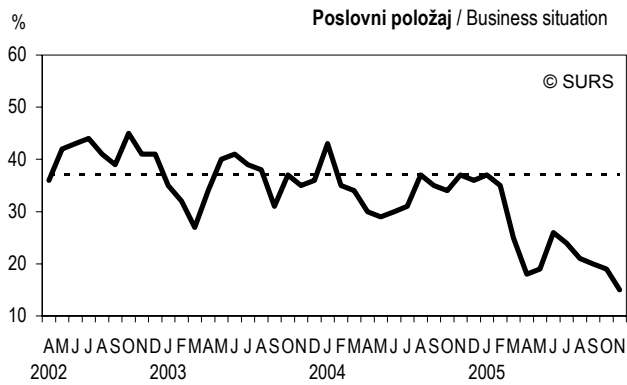
1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju. The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

2. GIBANJE EKONOMSKIH KAZALNIKOV V STORITVENIH DEJAVNOSTIH V SLOVENIJI, APRIL 2002 – NOVEMBER 2005

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

Ocena stanj / Appreciation of situation

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



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

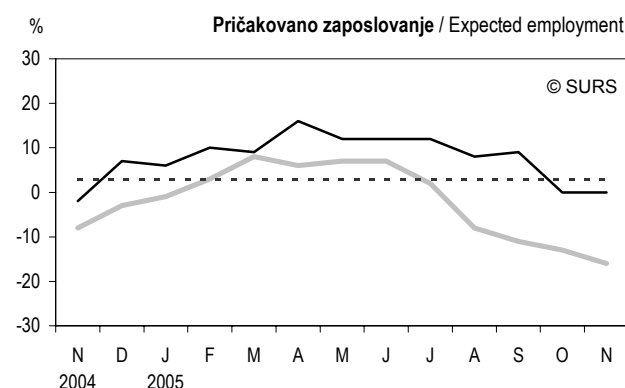
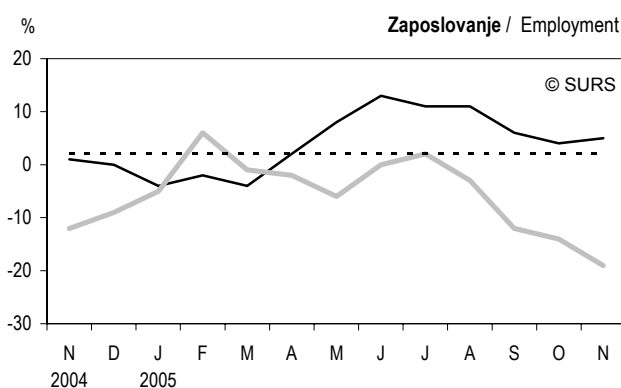
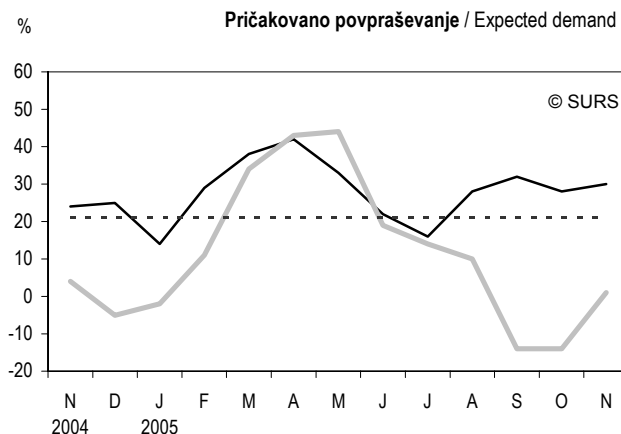
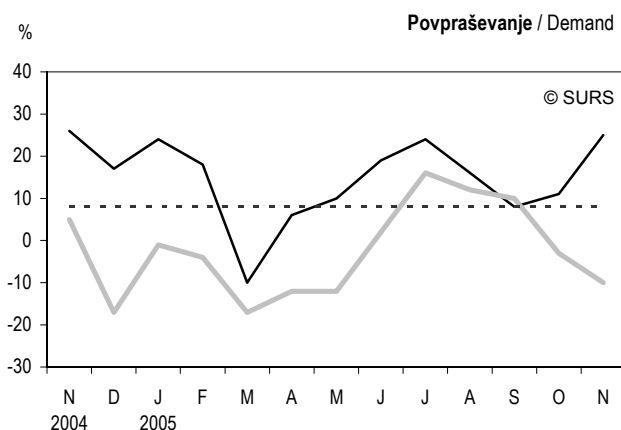
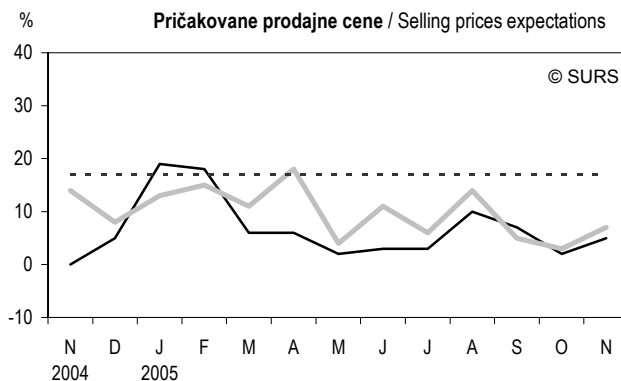
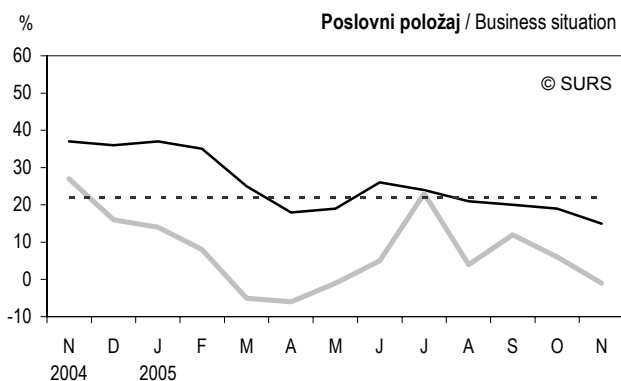


2.1 Gibanje ekonomskih kazalnikov v gostinstvu in s turizmom povezanih dejavnostih, november 2004 - november 2005

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

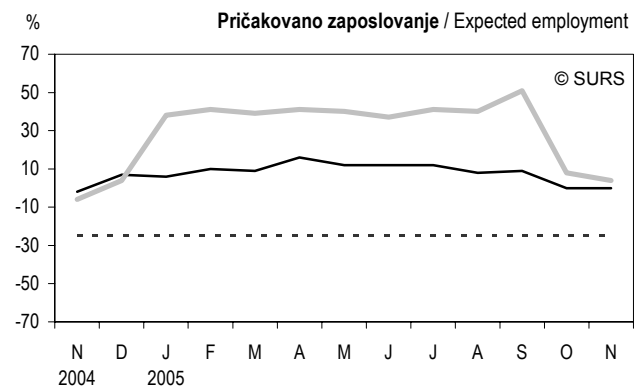
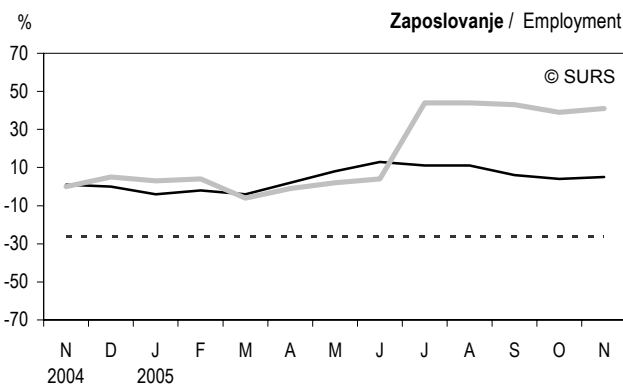
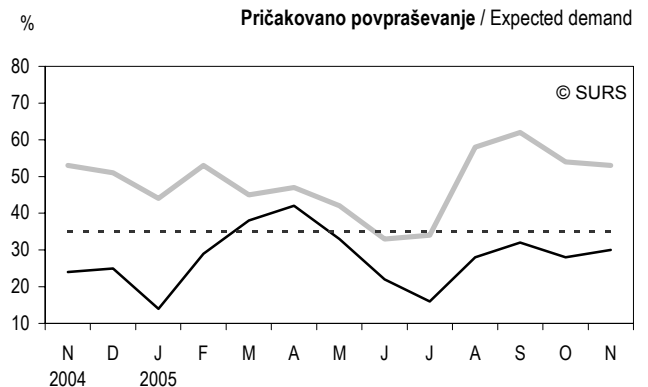
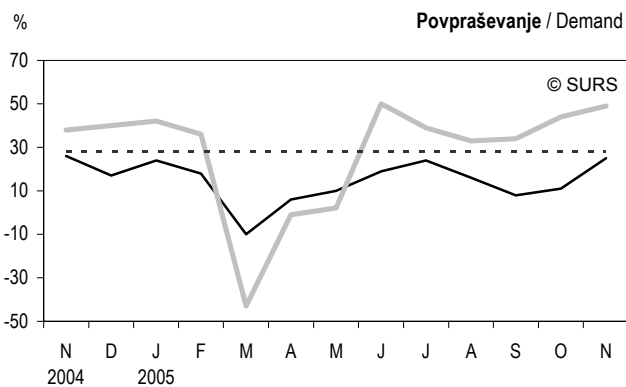
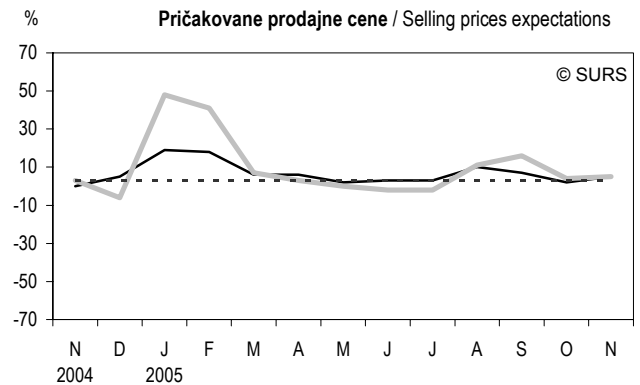
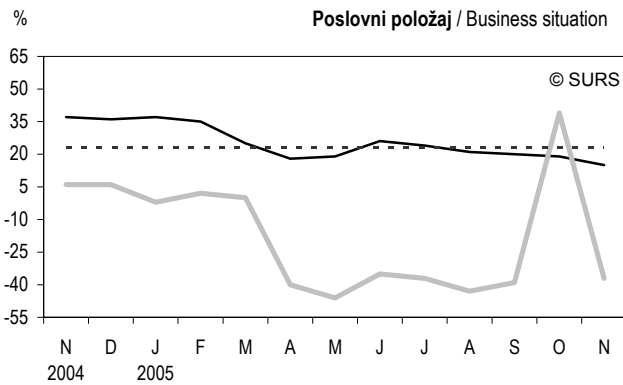
- - - - - dolgoletno povprečje
long-term average

2.2 Gibanje ekonomskih kazalnikov v kopenskem, vodnem in zračnem prometu, november 2004 - november 2005

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

Ocena stanja / Appreciation of situation

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



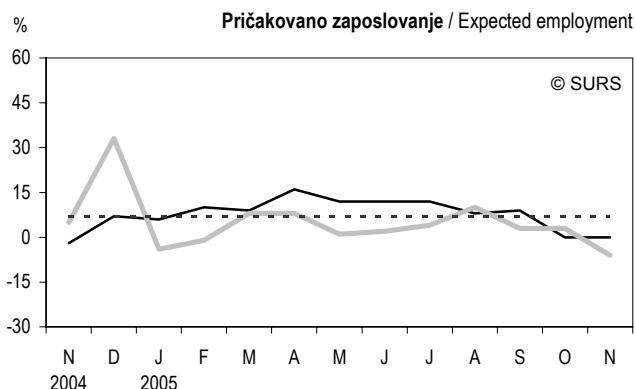
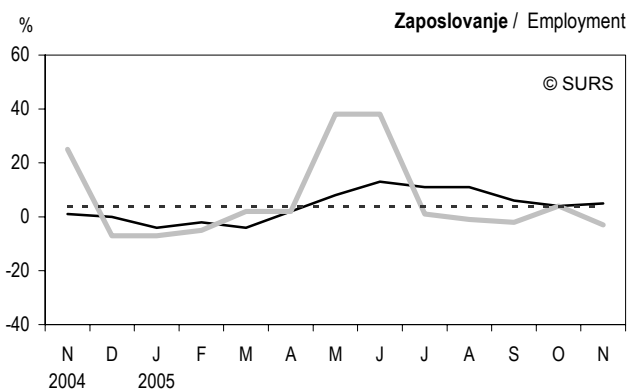
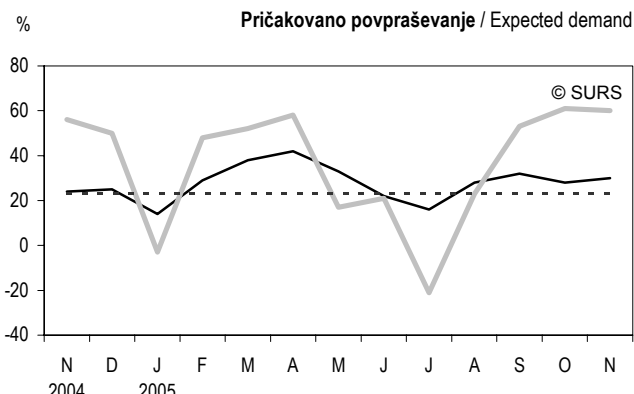
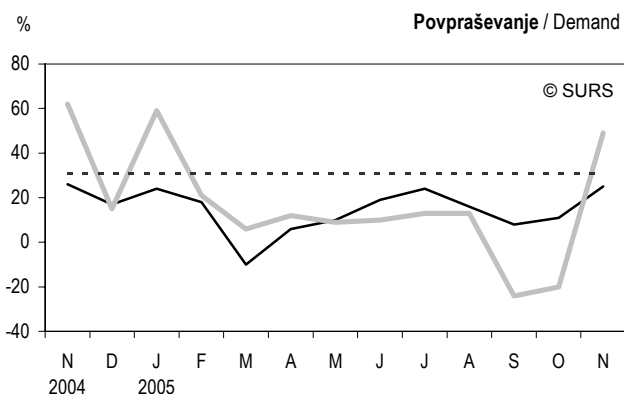
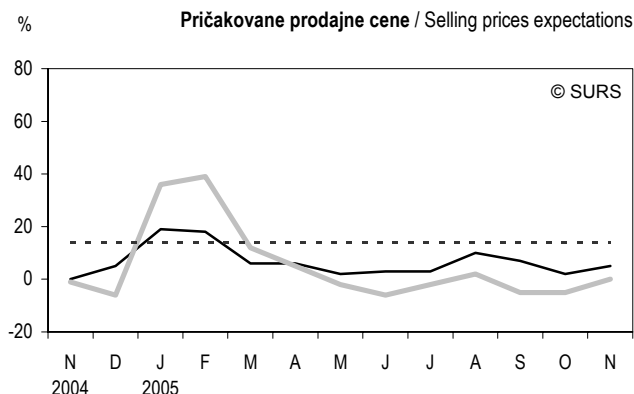
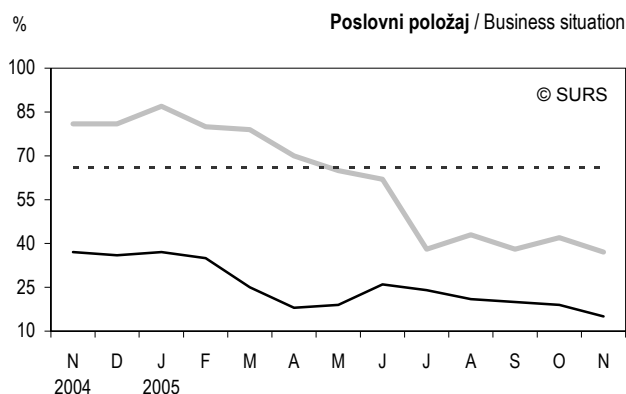
| | | |
|---|-------------------------------------|---|
| — kopenski, vodni in zračni promet land, water and air transport | — storitvene dejavnosti services | - - - - dolgoletno povprečje long-term average |
|---|-------------------------------------|---|

2.3 Gibanje ekonomskih kazalnikov za dejavnost pošte, telekomunikacij in obdelava podatkov, november 2004 - november 2005

Evolution of economic indicators in post and telecommunications and in data processing, November 2004 - November 2005

Ocena stanj / Appreciation of situation

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



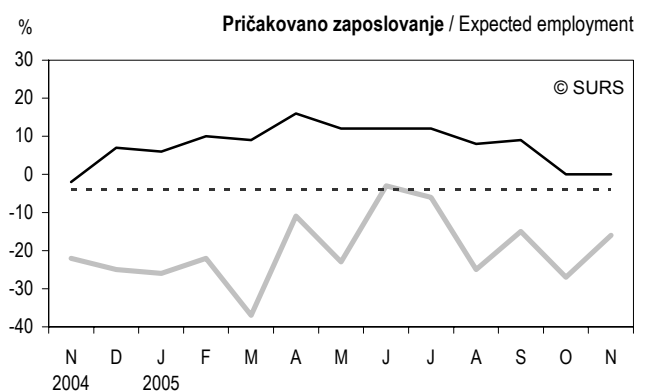
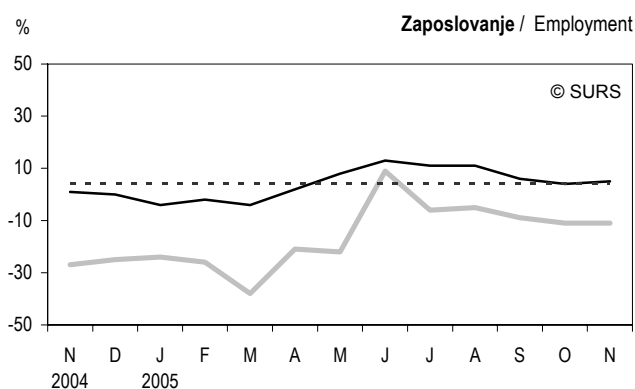
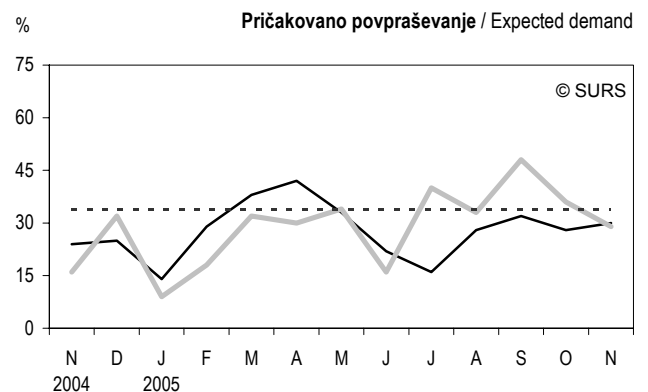
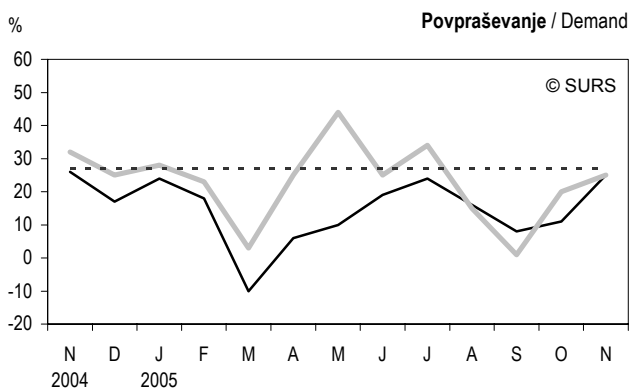
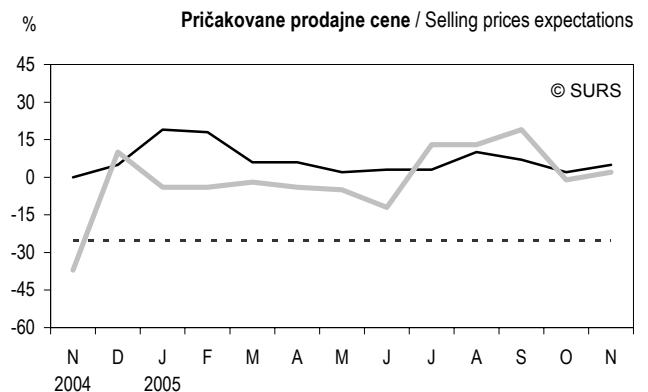
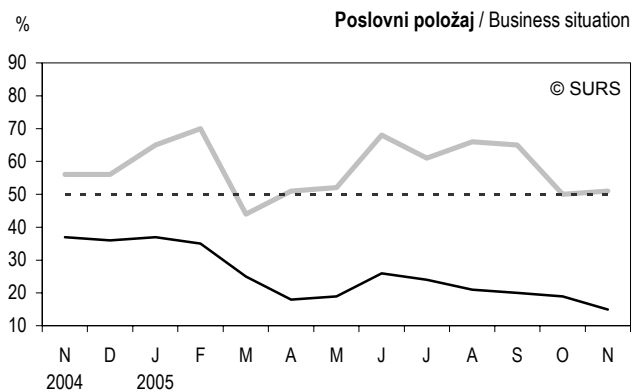
| | | |
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| — pošta, telekomunikacije in obdelava podatkov post and telecommunication, data processing | — storitvene dejavnosti services | - - - - - dolgoletno povprečje long-term average |
|---|-------------------------------------|---|

2.4 Gibanje ekonomskih kazalnikov za dejavnost finančno posredništvo, november 2004 - november 2005

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

Ocena stanj / Appreciation of situation

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

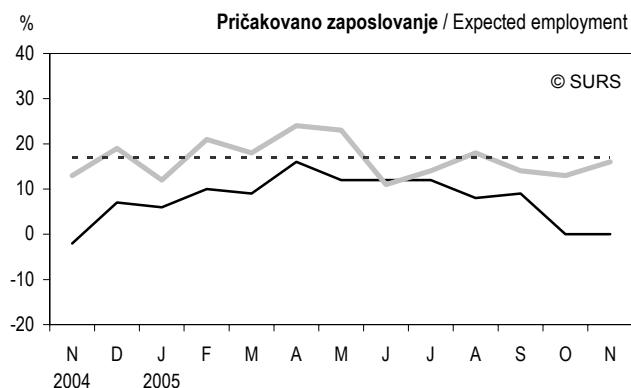
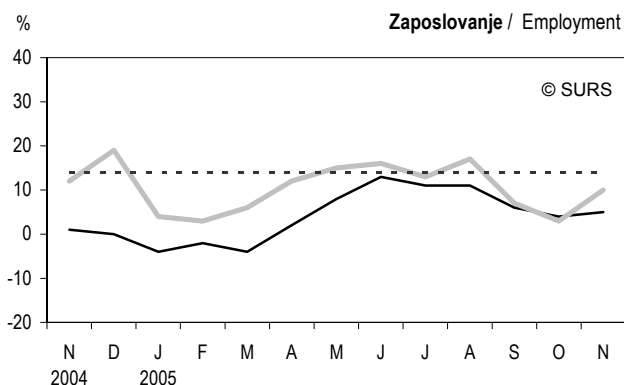
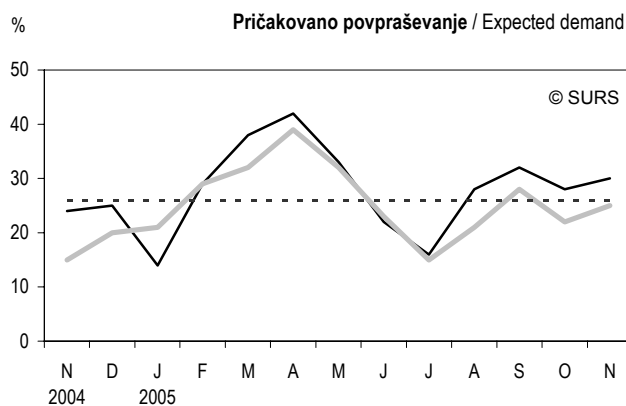
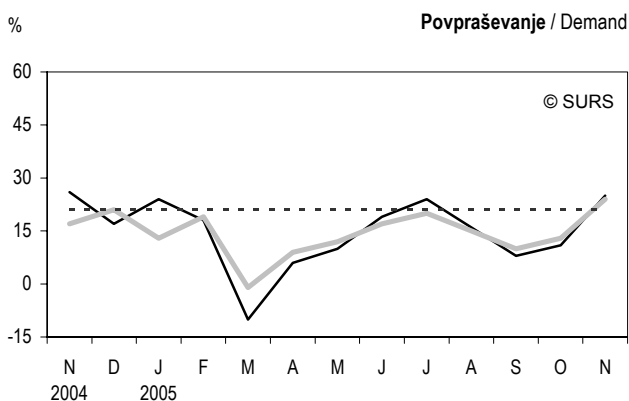
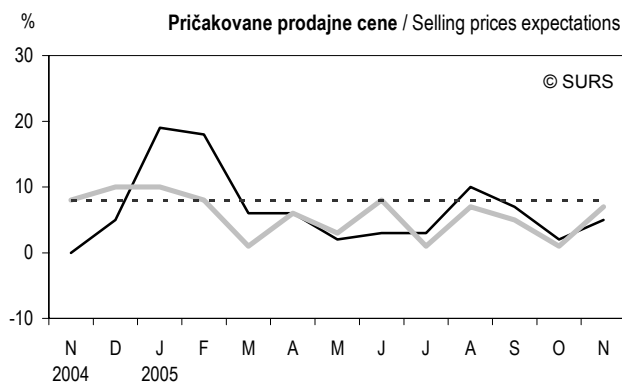
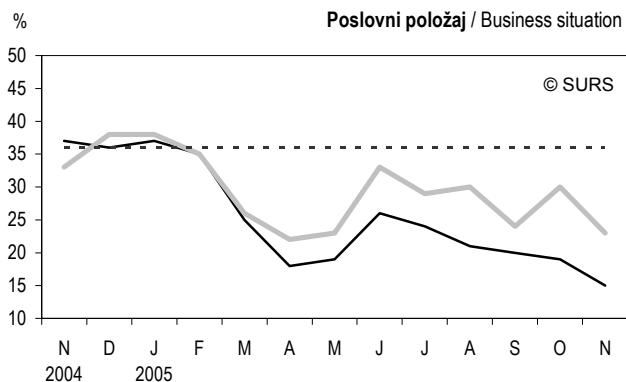


| | | | | | |
|---|---|---|-----------------------------------|---------|---|
| — | finančno posredništvo financial intermediation | — | storitvene dejavnosti services | - - - - | dolgoletno povprečje long-term average |
|---|---|---|-----------------------------------|---------|---|

2.5 Gibanje ekonomskih kazalnikov za dejavnost poslovanje z nepremičninami, najem in poslovne storitve, november 2004 - november 2005
 Evolution of economic indicators in real estate activities, renting and business services, November 2004 - November 2005

Ocena stanj / Appreciation of situation

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

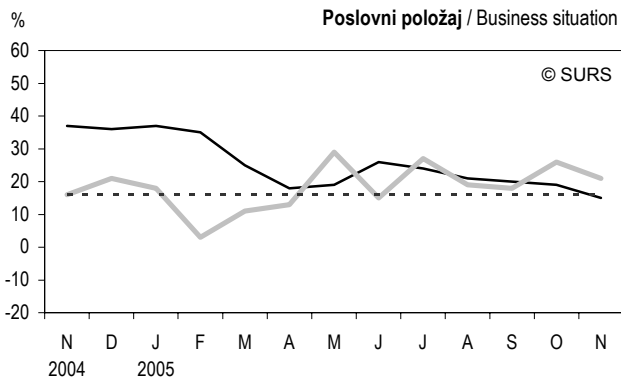


| | | |
|--|-------------------------------------|---|
| — poslovanje z nepremičninami, najem in poslovne storitve real estate activities, renting and business services | — storitvene dejavnosti services | - - - - - dolgoletno povprečje long-term average |
|--|-------------------------------------|---|

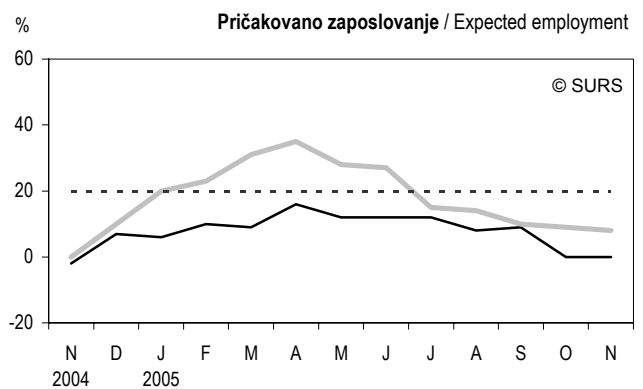
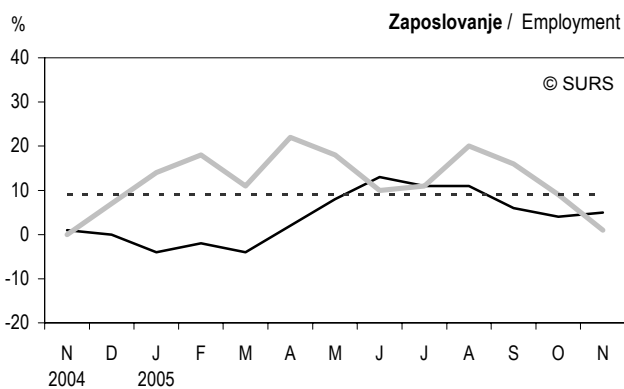
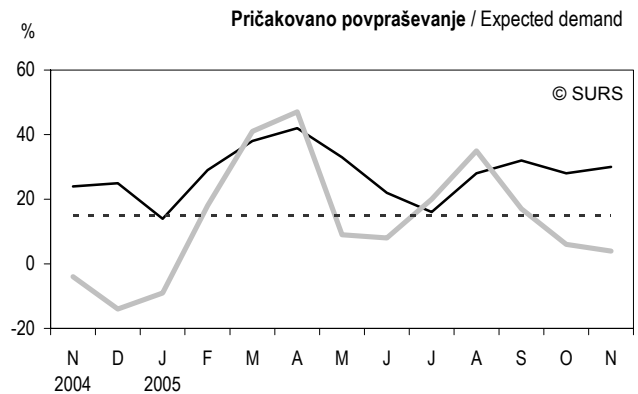
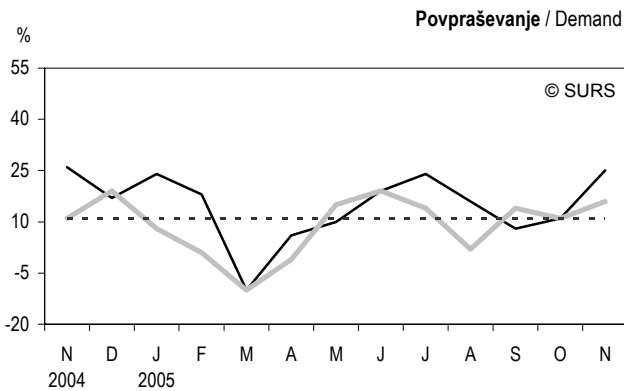
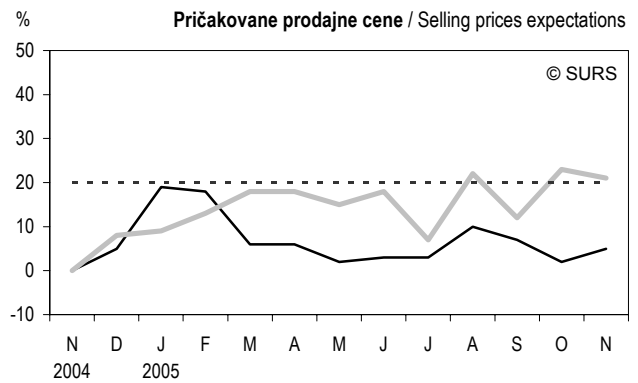
2.6 Gibanje ekonomskih kazalnikov za dejavnosti javne higiene in druge storitvene dejavnosti, november 2004 - november 2005

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

Ocena stanj / Appreciation of situation



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



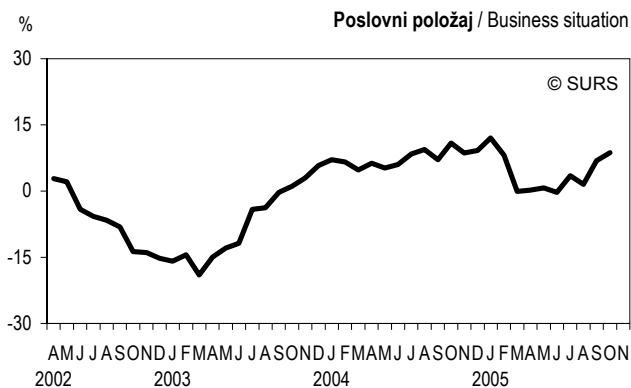
— dejavnost javne higiene in druge osebne storitvene dejavnosti
sewage disposal and other service activities

— storitvene dejavnosti
services

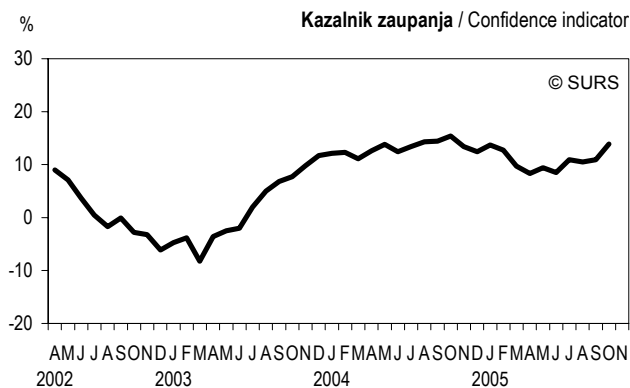
- - - dolgoletno povprečje
long-term average

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

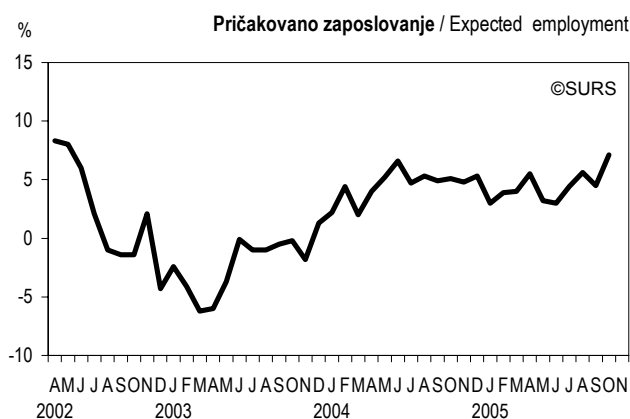
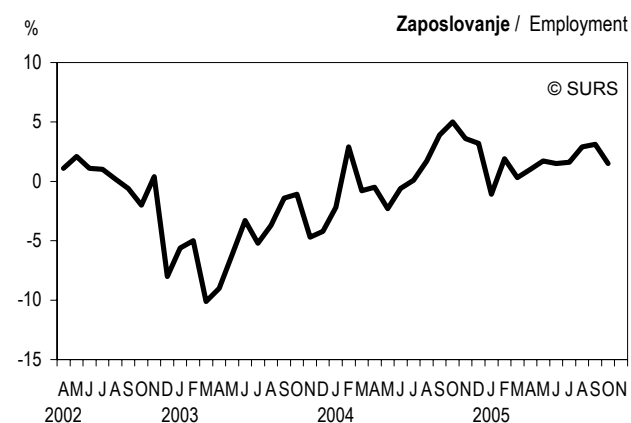
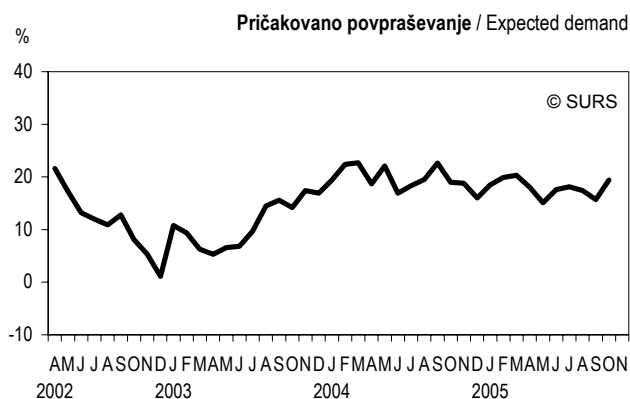
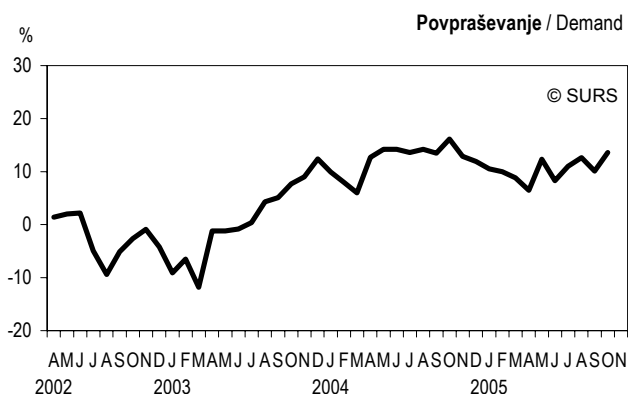
Ocena stanj / Appreciation of situation



Kazalnik 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.

The source for the EU data 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/M) je mesečno pridobivanje informacij o stanjih glavnih ekonomskih kazalnikov ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati ankete so osnova za izračun kazalnika 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/M 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/M) 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/M 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 kazalnikov (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalnikov. Grafikoni prikazujejo ravnotežja po posameznih vprašanjih.

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

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov v gostinstvu in s turizmom povezanih dejavnostih** združujejo rezultate dejavnosti 55 - Gostinstvo in 63.3 - Dejavnost potovalnih agencij in organizatorjev potovanj; s turizmom povezane dejavnosti.

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov v kopenskem, vodnem in zračnem prometu** združujejo rezultate dejavnosti 60 - Kopenski promet; cevovodni transport, 61 - Vodni promet in 62 - Zračni promet.

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov za dejavnost pošte, telekomunikacij in obdelava podatkov** združujejo rezultate dejavnosti 64 - Pošta in telekomunikacije in 72 - Obdelava podatkov, podatkovne baze in s tem povezane dejavnosti.

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov za dejavnost finančno posredništvo** združujejo rezultate dejavnosti 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.

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov za dejavnost poslovanje z nepremičninami, najem in poslovne storitve** združujejo rezultate dejavnosti 70 - Poslovanje z nepremičninami, 71 - Dajanje strojev in opreme brez upravljalcev v najem; izposojanje izdelkov široke porabe, 73 - Raziskovanje in razvoj in 74 - Druge poslovne dejavnosti.

Grafikoni z naslovom **Gibanje ekonomskih kazalnikov za dejavnosti javne higiene in druge storitvene dejavnosti** združujejo rezultate dejavnosti 90 - Dejavnosti javne higiene in 93 - Druge storitvene dejavnosti.

Objavljanje

Sodelujoči v anketi prejmejo mesečno informacijo o poslovnih tendencah v storitvenih dejavnostih.

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.

The charts **Evolution of economic indicators in hotels and restaurants and in tourist assistance activities** show results for 55 - Hotels and restaurants and 63.3 - Activities of travel agencies and tour operators; tourist assistance activities.

The charts **Evolution of economic indicators in land, water and air transport** show results for 60 - Land transport; transport via pipelines, 61 - Water transport and 62 - Air transport.

The charts **Evolution of economic indicators in post, telecommunications and data processing** show results for 64 - Post and telecommunications and 72 - Data processing, database activities and other computer related activities.

The charts **Evolution of economic indicators in financial intermediation** show results for 65 - Financial intermediation, except insurance and pension funding, 66 - Insurance and pension funding, except compulsory social security and 67 - Activities auxiliary to financial intermediation.

The charts **Evolution of economic indicators in real estate activities, renting and business services** show results for 70 - Real estate activities, 71 - Renting of machinery and equipment without operator and of personal and household goods, 73 - Research and development and 74 - Other business activities.

The charts **Evolution of economic indicators in sewage disposal and other service activities** show results for 90 - Sewage and refuse disposal, sanitation and similar activities and 93 - Other service activities.

Publishing

Participants in the survey get the monthly information on the business tendency in services.



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?

KOMENTAR

V novembru 2005 so direktorji ocenili tendence boljše kot pretekli mesec. Kazalnik zaupanja je bil 4 odstotne točke višji v primerjavi s stanjem v preteklem mesecu. V primerjavi z novembrom 2004 in v primerjavi z lanskim povprečjem pa je kazalec padel za 6 oz. 5 odstotnih točk.

POSLOVNI POLOŽAJ

Ocena poslovnega položaja se je v primerjavi s preteklim mesecem znižala za 4 odstotne točke. Glede na isti mesec lani je bila nižja za 22 odstotnih točk in 19 odstotnih točk pod povprečjem lanskega leta.

POVPRAŠEVANJE

Vrednost kazalnika sedanjega povpraševanja se je v primerjavi s preteklim mesecem zvišala za 14 odstotnih točk. Glede na isti mesec lani je bila nižja za 1 odstotno točko in 3 odstotne točke nad povprečjem lanskega leta.

Vrednost kazalnika pričakovanega povpraševanja se je v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. Glede na isti mesec lani je bila višja za 6 odstotnih točk in 4 odstotne točke nad povprečjem lanskega leta.

ZAPOSLOVANJE

Vrednost kazalnika zaposlovanja se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 4 odstotne točke in za 5 odstotnih točk višja od lanskega povprečja.

Vrednost kazalnika pričakovanega zaposlovanja je ostala glede na pretekli mesec enaka. Glede na isti mesec lanskega leta je bila višja za 2 odstotni točki in 4 odstotne točke pod povprečjem lanskega leta.

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?

COMMENT

In November 2005, managers estimated business tendencies in services better than in the previous month. Compared to the previous month the confidence indicator was up by 4 percentage points. Compared to November 2004 and to last year's average it fell by 6 and 5 percentage points, respectively.

BUSINESS SITUATION

The evaluation of the business situation fell by 4 percentage points compared to the previous month. Compared to November 2004 it was down by 22 percentage points and compared to last year's average by 19 percentage points.

DEMAND

The demand indicator rose by 14 percentage points compared to the previous month. Compared to November 2004 it was down by 1 percentage point and compared to last year's average it was up by 3 percentage points.

The expected demand indicator rose by 2 percentage points compared to the previous month. Compared to November 2004 it was up by 6 percentage points and compared to last year's average by 4 percentage points.

EMPLOYMENT

The employment indicator rose by 1 percentage point compared to the previous month. Compared to November 2004 it was up by 4 percentage points and compared to last year's average by 5 percentage points.

The expected employment indicator remained the same as in the previous month. Compared to November 2004 it was up by 2 percentage points and compared to last year's average it was down by 4 percentage points.



PRODAJNE CENE

Cenovna pričakovanja za naslednje tri mesece so bila v primerjavi s preteklim mesecem višja za 3 odstotne točke. Glede na isti mesec lani so bila višja za 5 odstotnih točk in 1 odstotno točko nad povprečjem lanskega leta.

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SELLING PRICES

Price expectations for the next three months rose by 3 percentage points. Compared to November 2004 they were up by 5 percentage points and compared to last year's average by 1 percentage point.

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