



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

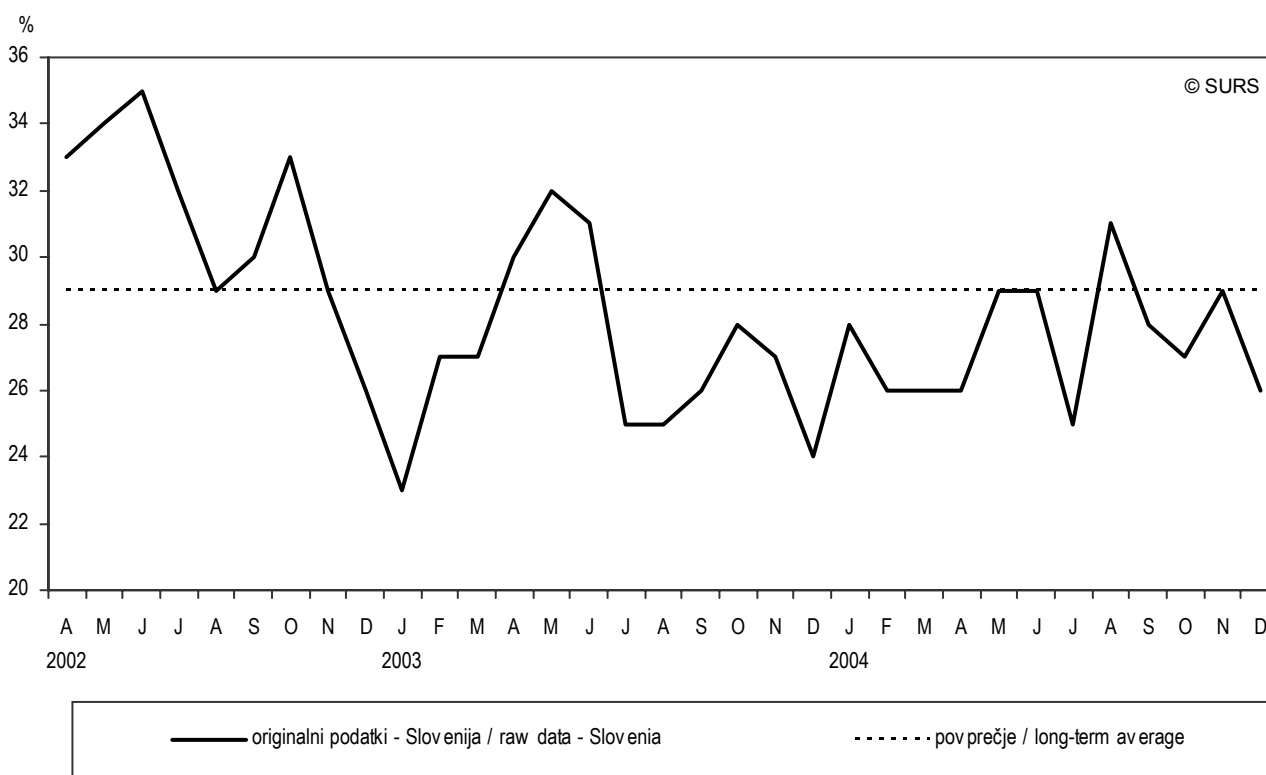
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, DECEMBER 2004

BUSINESS TENDENCY IN SERVICES, SLOVENIA, DECEMBER 2004

- ▶ V decembru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 3 odstotne točke v primerjavi s preteklim mesecem. Glede na isti mesec lanskega leta se je njegova vrednost dvignila za 2 odstotni točki, medtem ko je glede na lansko povprečje padla za 1 odstotno točko.
- ▶ Na negativno gibanje kazalca zaupanja sta vplivali oceni sedanjega poslovnega položaja in sedanjega povpraševanja.
- ▶ Vsi kazalci pričakovanj so se izboljšali, medtem ko so se vsi kazalci stanj poslabšali.
- ▶ In December 2004 the service confidence indicator fell by 3 percentage points compared to the previous month. Compared to December 2003 its value rose by 2 percentage points while compared to last year's average it fell by 1 percentage point.
- ▶ The negative evolution of the confidence indicator was influenced by the present business situation and present demand.
- ▶ All indicators of expectation improved while all indicators of situation worsened.

1. KAZALEC ZAUPANJA<sup>1)</sup> V SLOVENIJI, APRIL 2002 – DECEMBER 2004

CONFIDENCE INDICATOR<sup>1)</sup> IN SLOVENIA, APRIL 2002 – DECEMBER 2004



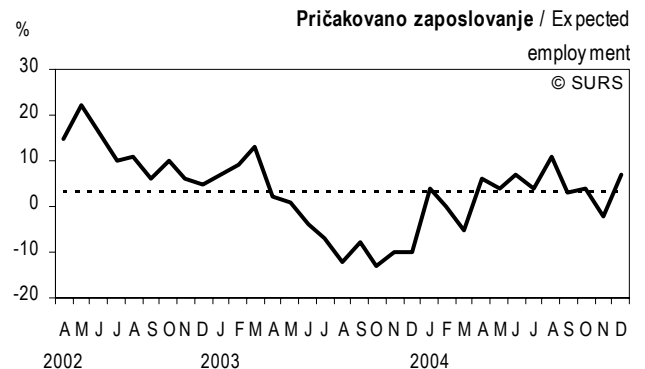
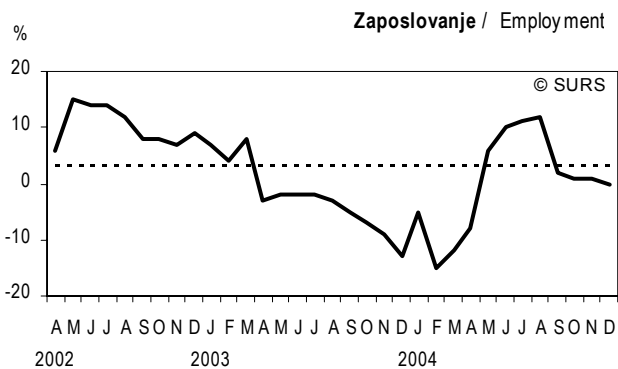
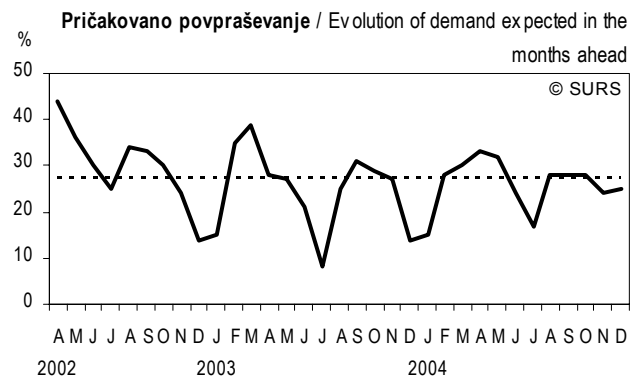
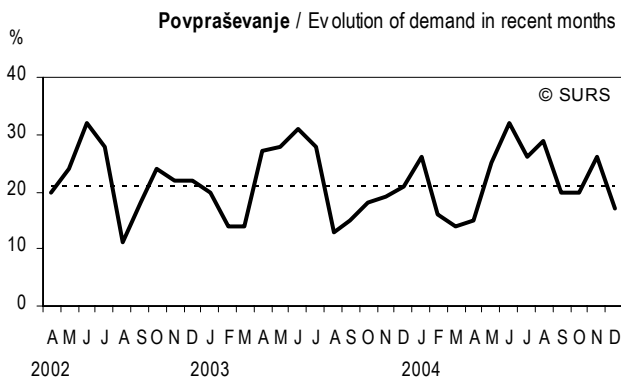
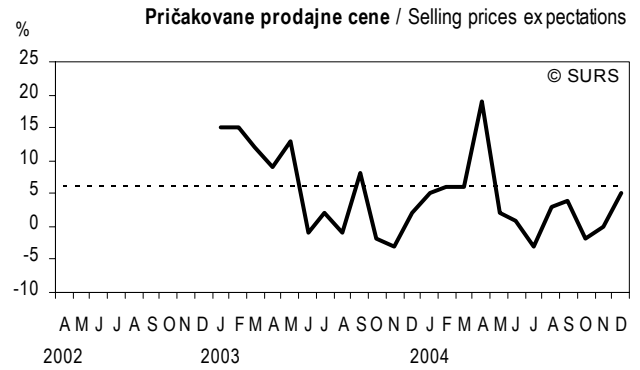
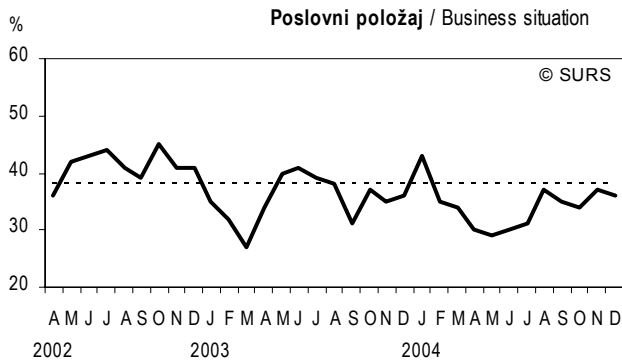
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.  
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

## 2. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V SLOVENIJI, APRIL 2002 – DECEMBER 2004

EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN SLOVENIA, APRIL 2002 - DECEMBER 2004

## Ocena stanj / Appreciation of situation

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

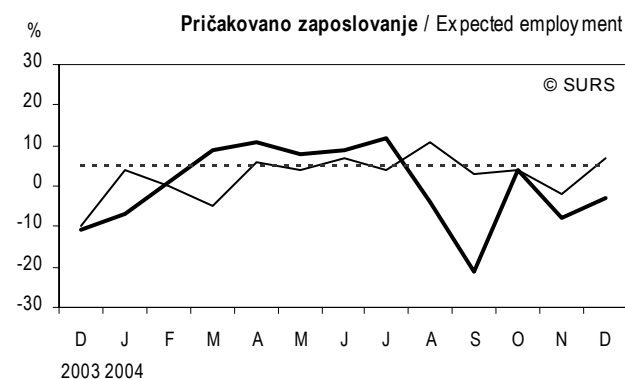
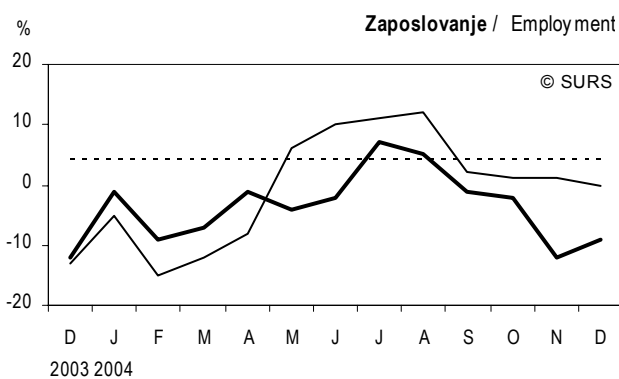
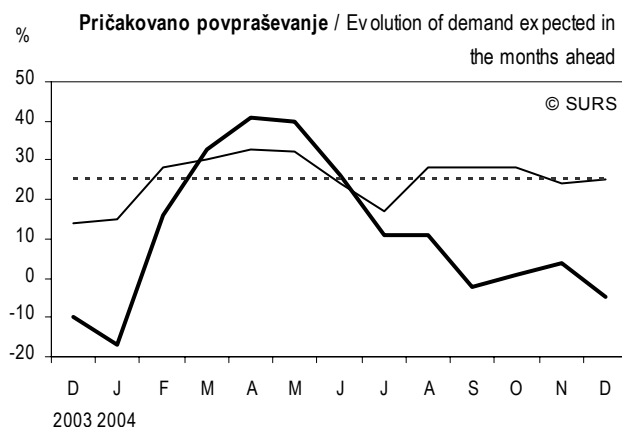
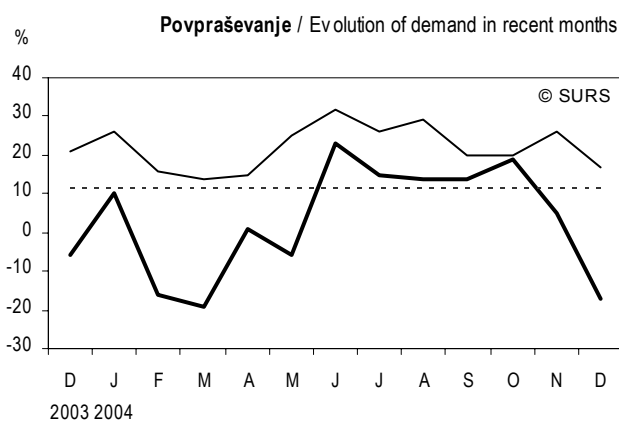
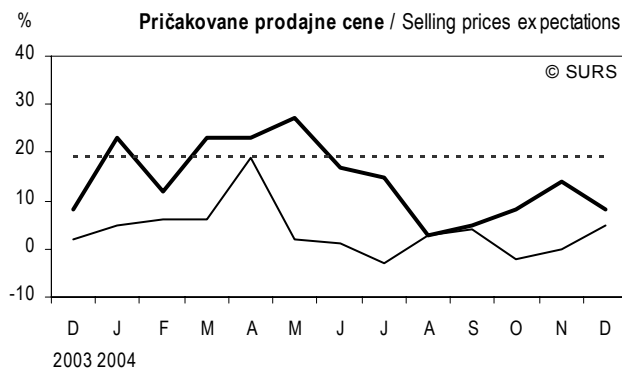
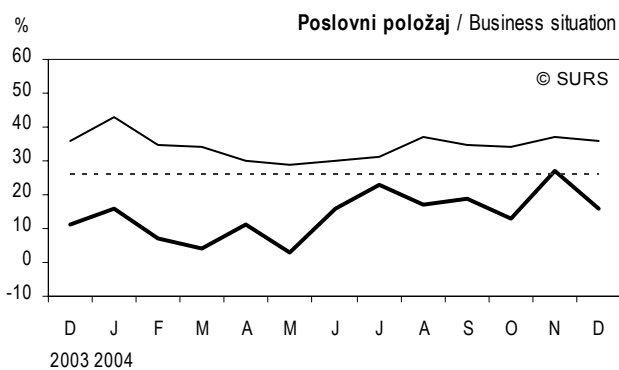
— storitvene dejavnosti  
services- - - povprečje  
long-term average

## 2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, december 2003 - december 2004

Evolution of economic indicators in hotels and restaurants and in tourist assistance activities, December 2003 - December 2004

### 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

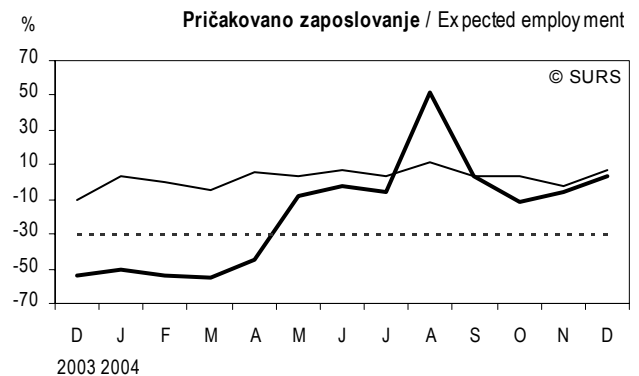
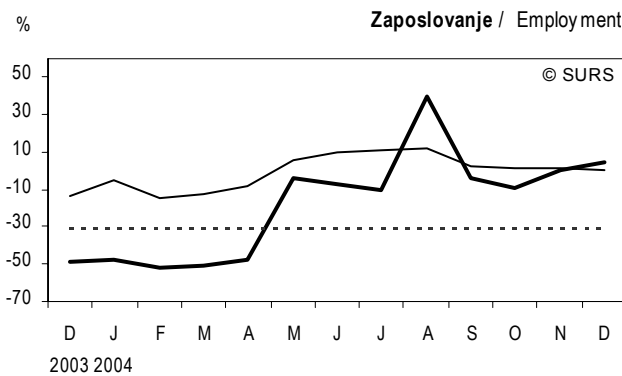
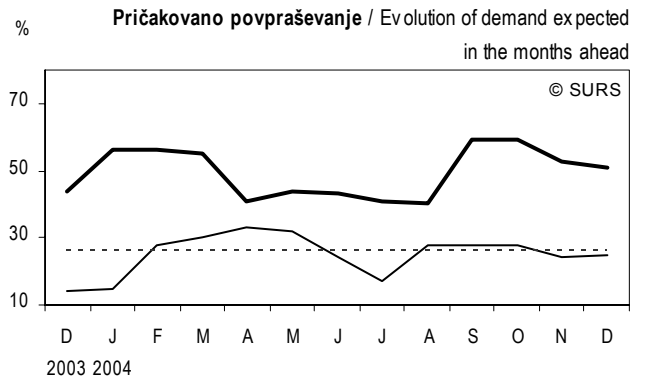
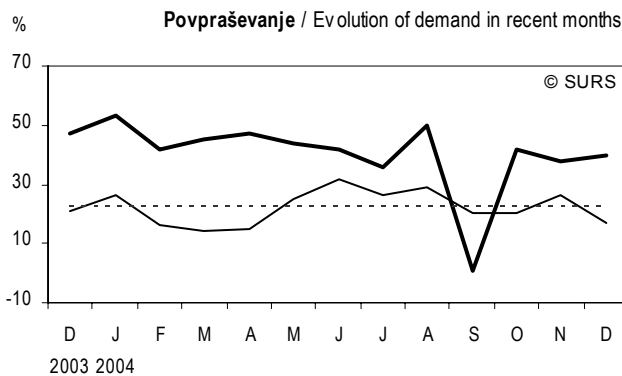
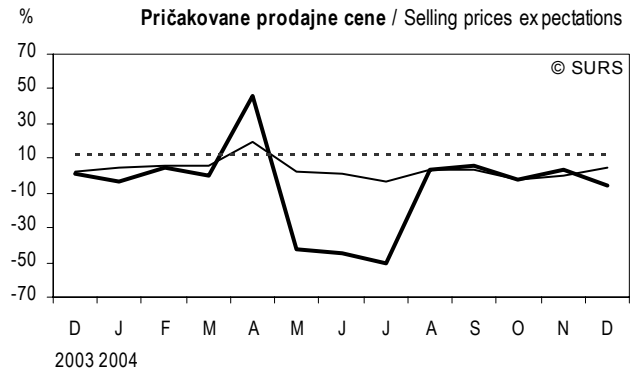
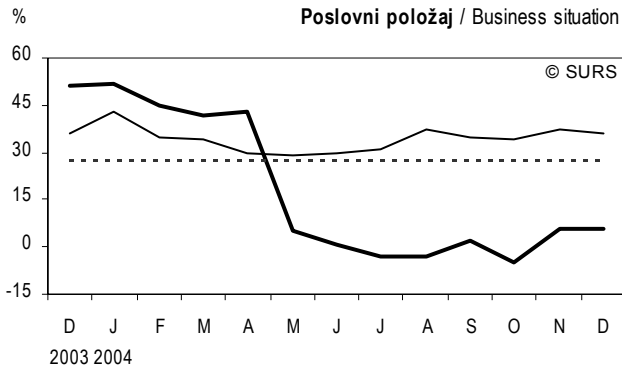
- - - povprečje  
long-term average

## 2.2 Gibanje ekonomskih kazalcev v kopenskem, vodnem in zračnem prometu, december 2003 - december 2004

Evolution of economic indicators in land, water and air transport, December 2003 - December 2004

## Ocena stanj / Appreciation of situation

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

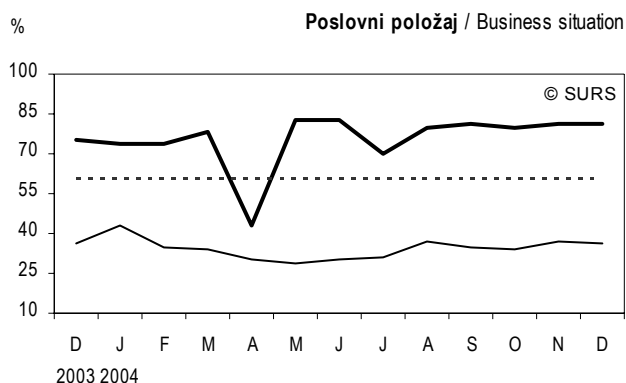


|   |                                   |                                |
|---|-----------------------------------|--------------------------------|
| kopenski, vodni in zračni promet<br>land, water and air transport | storitvene dejavnosti<br>services | povprečje<br>long-term average |
|---|-----------------------------------|--------------------------------|

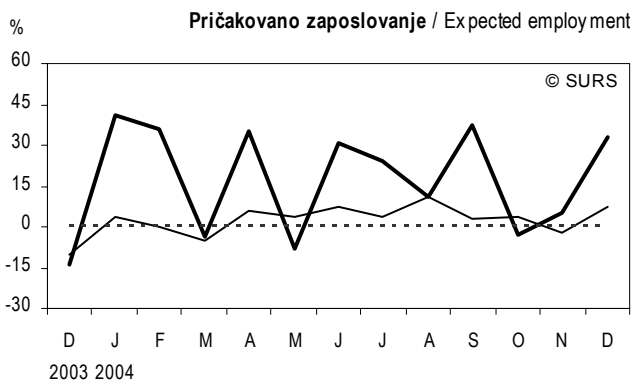
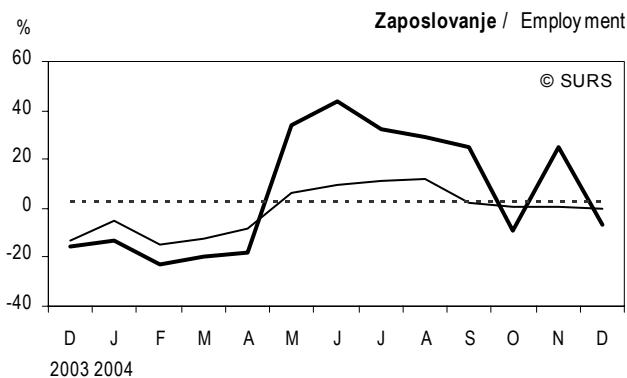
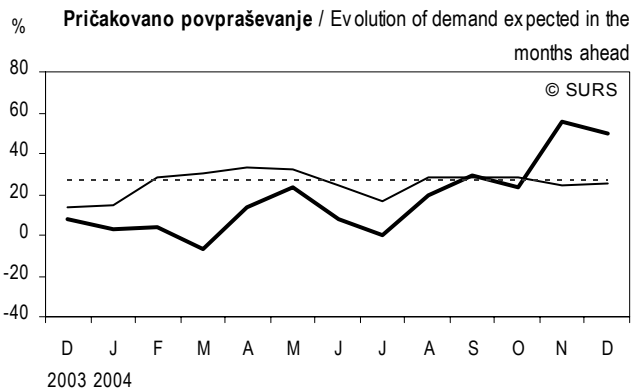
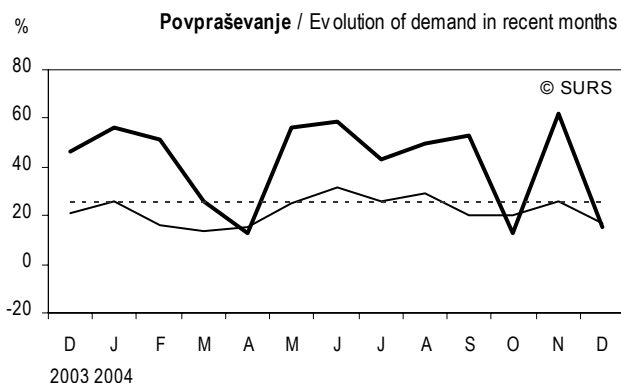
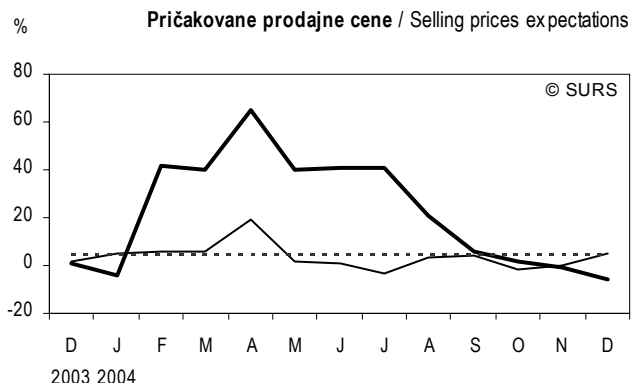
### 2.3 Gibanje ekonomskih kazalcev za dejavnost: pošte, telekomunikacij in obdelava podatkov, december 2003 - december 2004

Evolution of economic indicators in post and telecommunication and in data processing, December 2003 - December 2004

#### 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

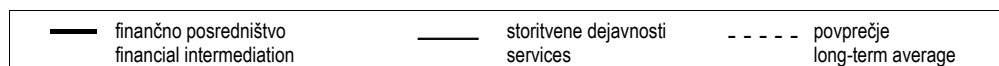
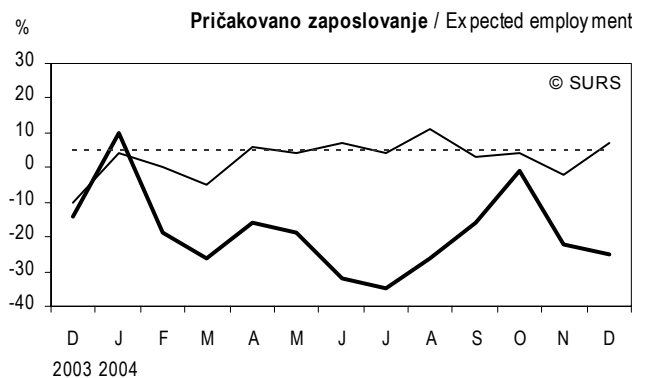
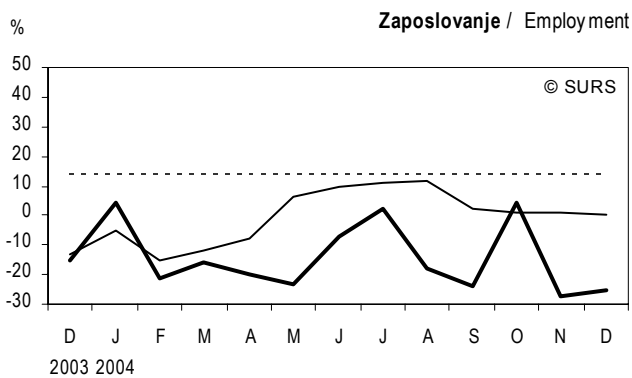
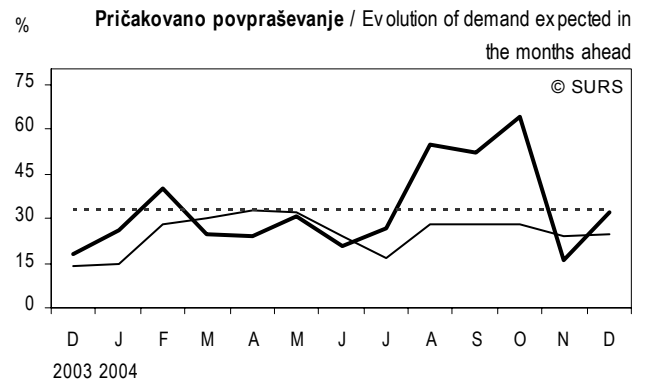
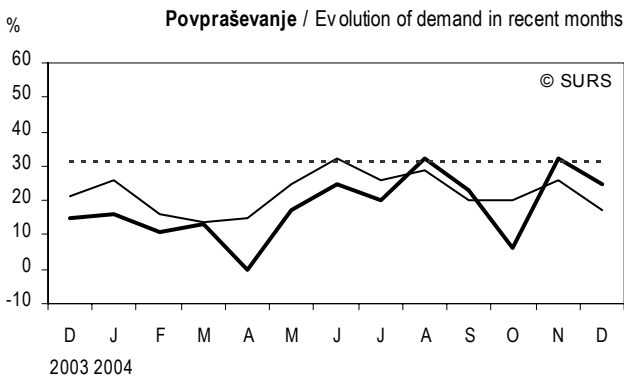
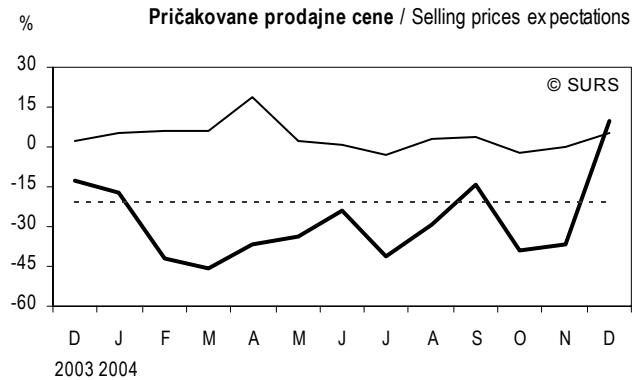
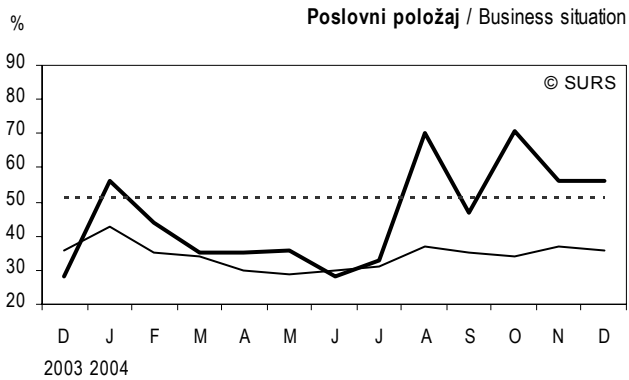
- - - - povprečje  
long-term average

## 2.4 Gibanje ekonomskih kazalcev za dejavnost: finančno posredništvo, december 2003 - december 2004

Evolution of economic indicators in financial intermediation, December 2003 - December 2004

## Ocena stanj / Appreciation of situation

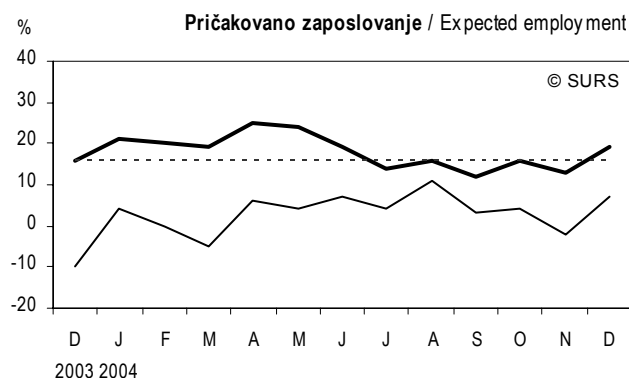
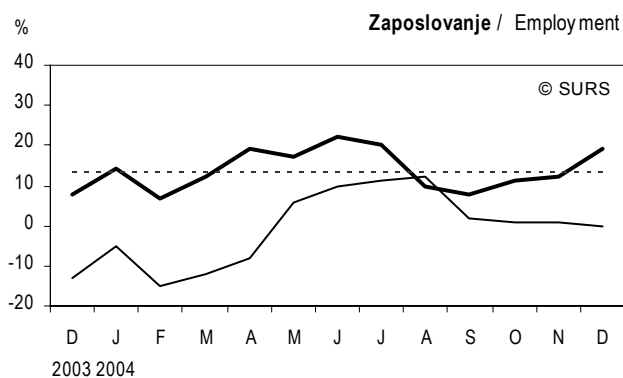
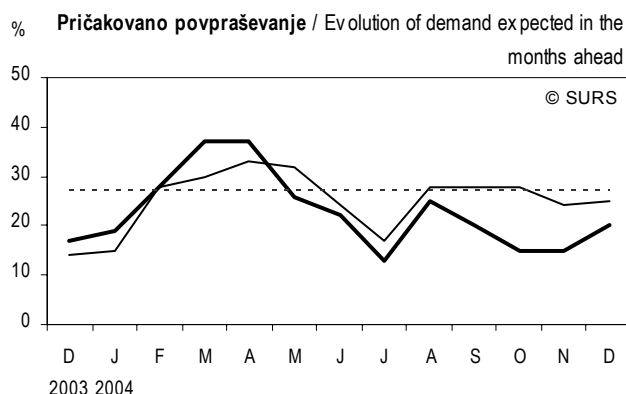
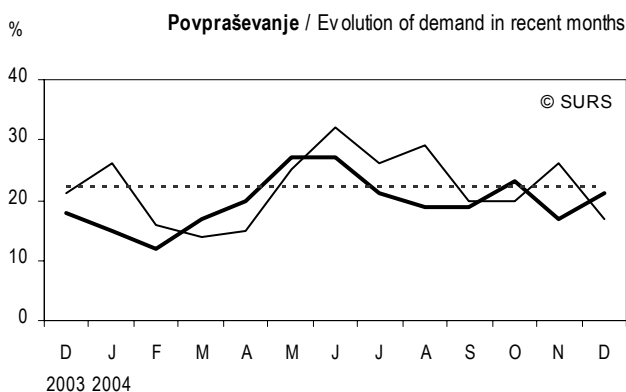
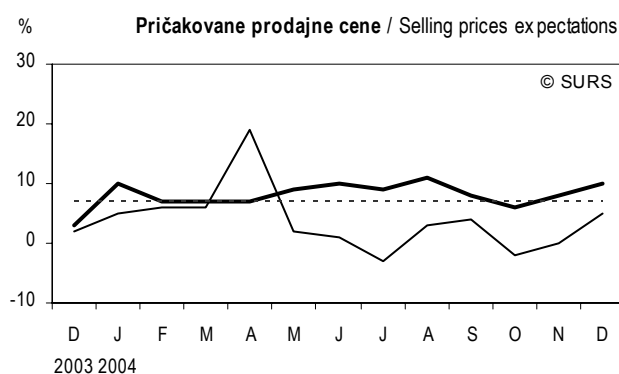
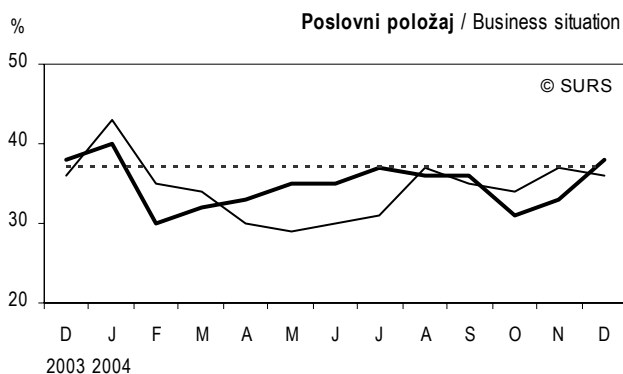
## Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



**2.5 Gibanje ekonomskih kazalcev za dejavnost: poslovanje z nepremičninami, najem in poslovne storitve, december 2003 - december 2004**  
Evolution of economic indicators in real estate activities, renting and business services, December 2003 - December 2004

**Ocena stanj / Appreciation of situation**

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



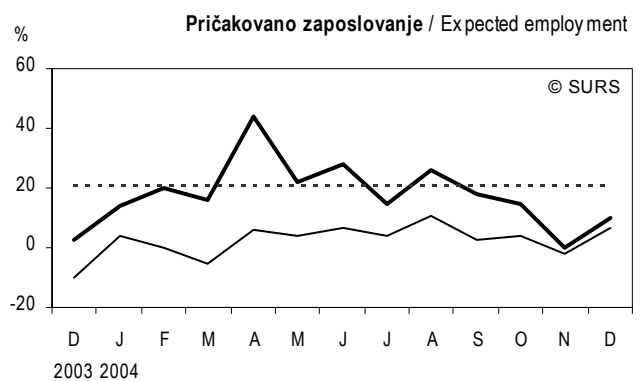
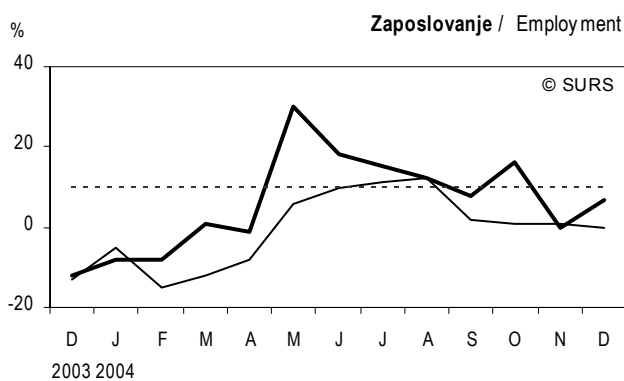
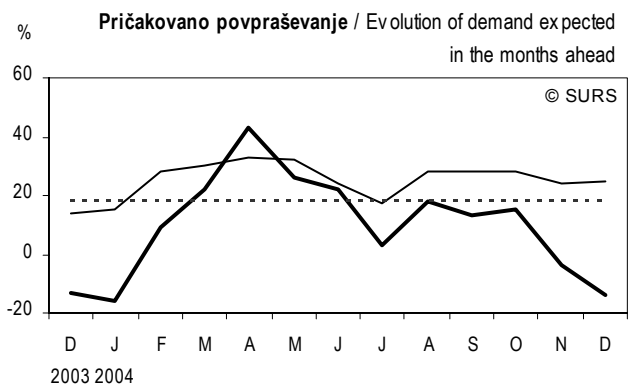
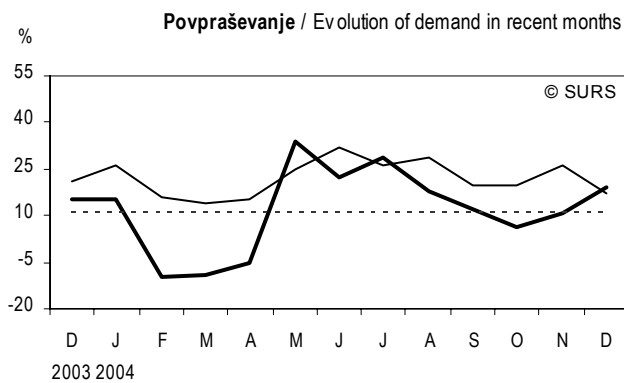
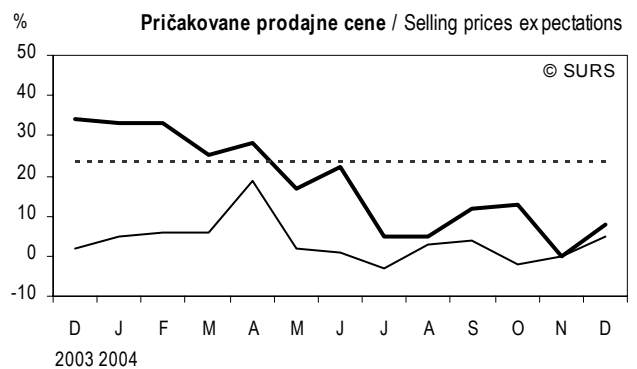
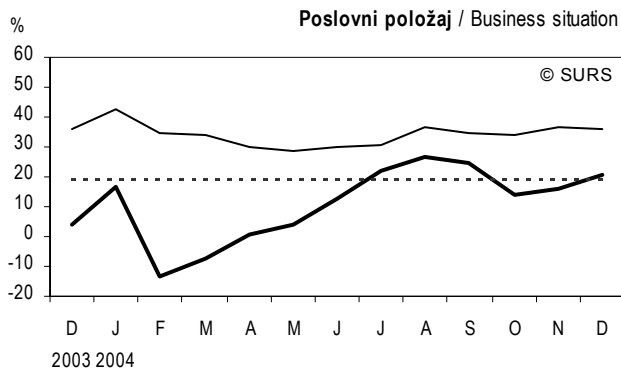
|  |                                   |                                |
|--|-----------------------------------|--------------------------------|
| poslovanje z nepremičninami, najem in poslovne storitve<br>real estate activities, renting and business services | storitvene dejavnosti<br>services |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

## 2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, december 2003 - december 2004

Evolution of economic indicators in sewage disposal and other service activities, December 2003 - December 2004

## 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

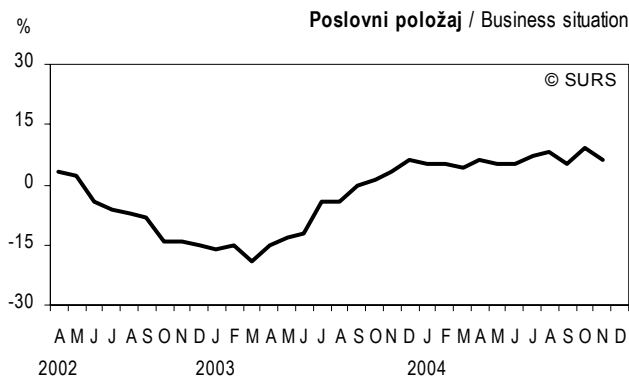
— storitvene dejavnosti  
services

- - - dolgoletno povprečje  
long-term average

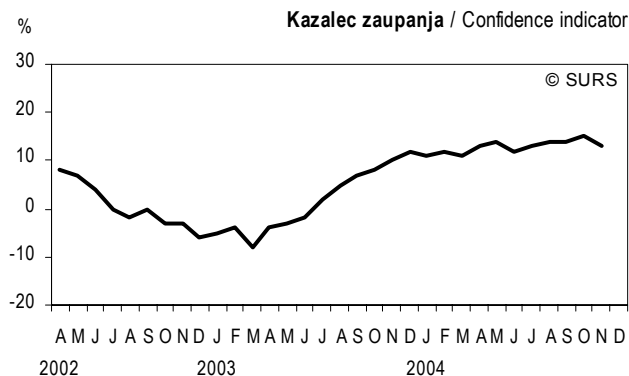


### 3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU<sup>1)</sup>, APRIL 2002 – DECEMBER 2004 EVOLUTION OF ECONOMIC INDICATORS IN SERVICE IN THE EU<sup>1)</sup>, APRIL 2002 – DECEMBER 2004

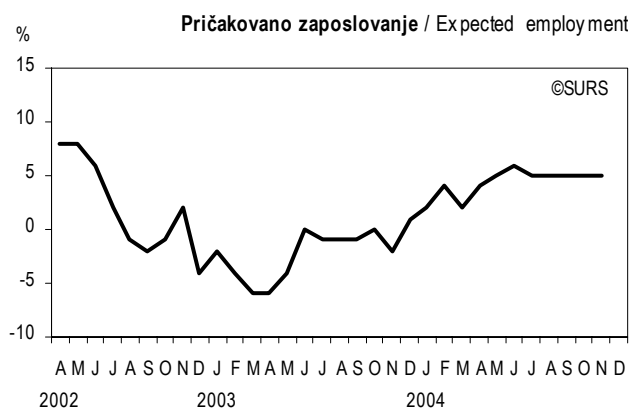
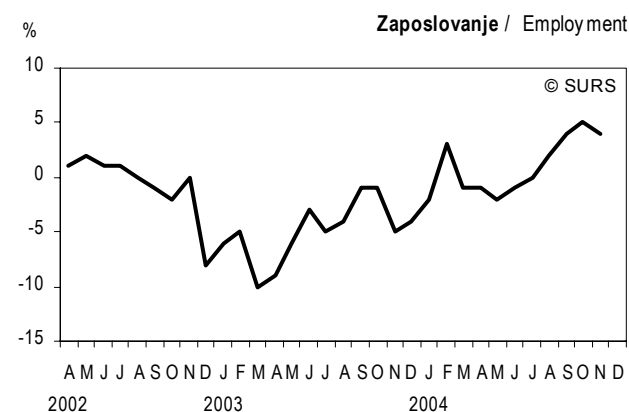
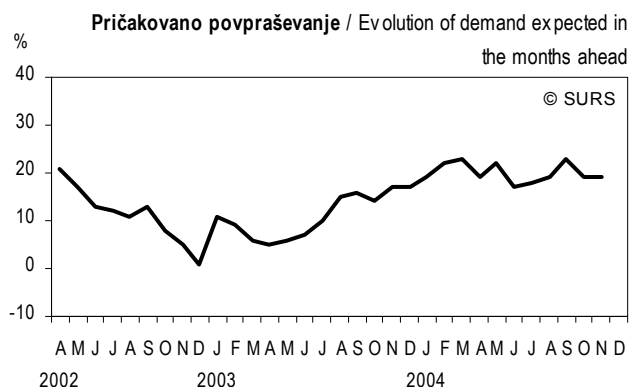
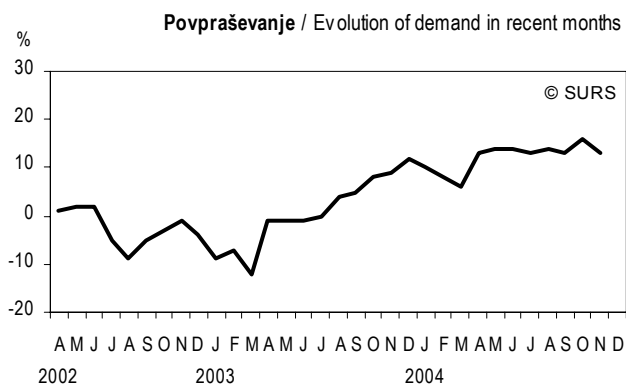
#### Ocena stanj / Appreciation of situation



#### Kazalec zaupanja / Confidence indicator



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



1) Vir podatkov za EU je Evropska komisija; podatki so desezonirani. Podatki za zadnji mesec nam niso na voljo.  
Data source for EU is the European Commission; 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 anket 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 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.

We have been carrying out the Panel Survey on Business Tendency in Services 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:

- 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

Persons responding to 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 12 % malih podjetij (ali 16 % zaposlenih v malih podjetjih), ki so razvrščena v storitveno dejavnost. Panelni vzorec pokriva 18 % podjetij vzorčnega okvira ali 70 % 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** 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 mesecih: zvišale, ostale enake, znižale?

## KOMENTAR

V decembru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 3 odstotne točke v primerjavi s preteklim mesecem. Glede na isti mesec lanskega leta se je njegova vrednost dvignila za 2 odstotni točki, medtem ko je glede na lansko povprečje padla za 1 odstotno točko.

## Coverage

The panel includes all large and medium-sized enterprises and 12% 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 70% 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** is the arithmetic mean of responses (balances) to the questions on business situation, and present and expected demand.

## Publishing

Persons participating 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?

## COMMENT

In December 2004 the service confidence indicator fell by 3 percentage points compared to the previous month. Compared to December 2003 its value rose by 2 percentage points while compared to last year's average it fell by 1 percentage point.



Na negativno gibanje kazalca zaupanja sta vplivali oceni sedanjega poslovnega položaja in sedanjega povpraševanja.

Vsi kazalci pričakovanj so se izboljšali, medtem ko so se vsi kazalci stanj poslabšali.

### POSLOVNI POLOŽAJ

V primerjavi s prejšnjim mesecem se je poslovni položaj v zadnjih treh mesecih poslabšal, saj je kazalec padel za 1 odstotno točko. Glede na isti mesec lanskega leta se poslovni položaj ni spremenil. Majhno izboljšanje je bilo zabeleženo glede na lansko povprečje, kajti vrednost kazalca se je dvignila za 1 odstotno točko.

### POVPRAŠEVANJE

V zadnjih 3 mesecih se je povpraševanje po storitvah poslabšalo v vseh treh primerjavah. Glede na pretekli mesec se je kazalec znižal za 9 odstotnih točk in za 4 odstotne točke glede na isti mesec lanskega leta ter glede na lansko povprečje. Po drugi strani pa so bili direktorji zelo optimistični glede gibanja povpraševanja v naslednjih treh mesecih. Glede na november 2004 je bil kazalec pričakovanega povpraševanja višji za 1 odstotno točko, glede na december 2003 za 11 odstotnih točk in je ostal enak glede na lansko povprečje.

### ZAPOSLOVANJE

V decembru 2004 so direktorji ocenili, da se je zaposlovanje v zadnjih 3 mesecih znižalo. Kazalec zaposlovanja je bil namreč za 1 odstotno točko nižji kot prejšnji mesec. Glede na isti mesec lanskega leta se je kazalec zelo izboljšal (za 13 odstotnih točk) in bil za 2 odstotni točki nad lanskim povprečjem. Kazalec pričakovanega zaposlovanja se je močno dvignil, saj je bil za 9 odstotnih točk višji kot pretekli mesec. V primerjavi z istim mesecem lani se je pričakovano zaposlovanje povečalo za 17 odstotnih točk, glede na lansko povprečje pa za 10 odstotnih točk.

### PRODAJNE CENE

Direktorji ocenjujejo, da se bodo prodajne cene v storitvenih dejavnostih zvišale, saj je bil kazalec pričakovanih prodajnih cen glede na pretekli mesec višji za 5 odstotnih točk. Glede na isti mesec lanskega leta se je kazalec zvišal za 3 odstotne točke, medtem ko je za lanskim povprečjem zaostal za 1 odstotno točko.

Statistično raziskovanje je sofinancirala Evropska komisija. Za objavljene podatke in besedila je odgovoren izključno Statistični urad Republike Slovenije in ne Evropska komisija.

**Sestavila / Prepared by:** Darja Regoršek

The negative evolution of the confidence indicator was influenced by the present business situation and present demand.

All indicators of expectation improved while all indicators of situation worsened.

### BUSINESS SITUATION

Compared to the previous month, the business situation in the past three months worsened as this indicator fell by 1 percentage point. Compared to December 2003 there was no change in the business situation. A slight improvement was registered compared to last year's average as the value of this indicator rose by 1 percentage point.

### DEMAND

In the past three months demand for services showed overall worsening. Compared to the previous month, the demand indicator fell by 9 percentage points and by 4 percentage points compared to December 2003 and to last year's average. On the other hand, managers were very optimistic about the demand in the next three months. Compared to November 2004 the expected demand indicator rose by 1 percentage point and compared to December 2003 by 11 percentage points. Compared to last year's average it remained unchanged.

### EMPLOYMENT

According to managers' estimates in December 2004, employment lowered in the past three months. The employment indicator was namely 1 percentage point lower than in the previous month. On the positive side, the indicator showed a stronger improvement compared to December 2003 (by 13 percentage points) and it was 2 percentage points above last year's average. The expected employment indicator rose markedly as it was 9 percentage points higher than in the previous month. Compared to December 2003 it rose by 17 percentage points and compared to last year's average by 10 percentage points.

### SELLING PRICES

Managers estimated that selling prices would rise in the next few months as the indicator was 5 percentage points higher than in the previous month. Compared to December 2003 it rose by 3 percentage points while it was 1 percentage point below last year's average.

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