



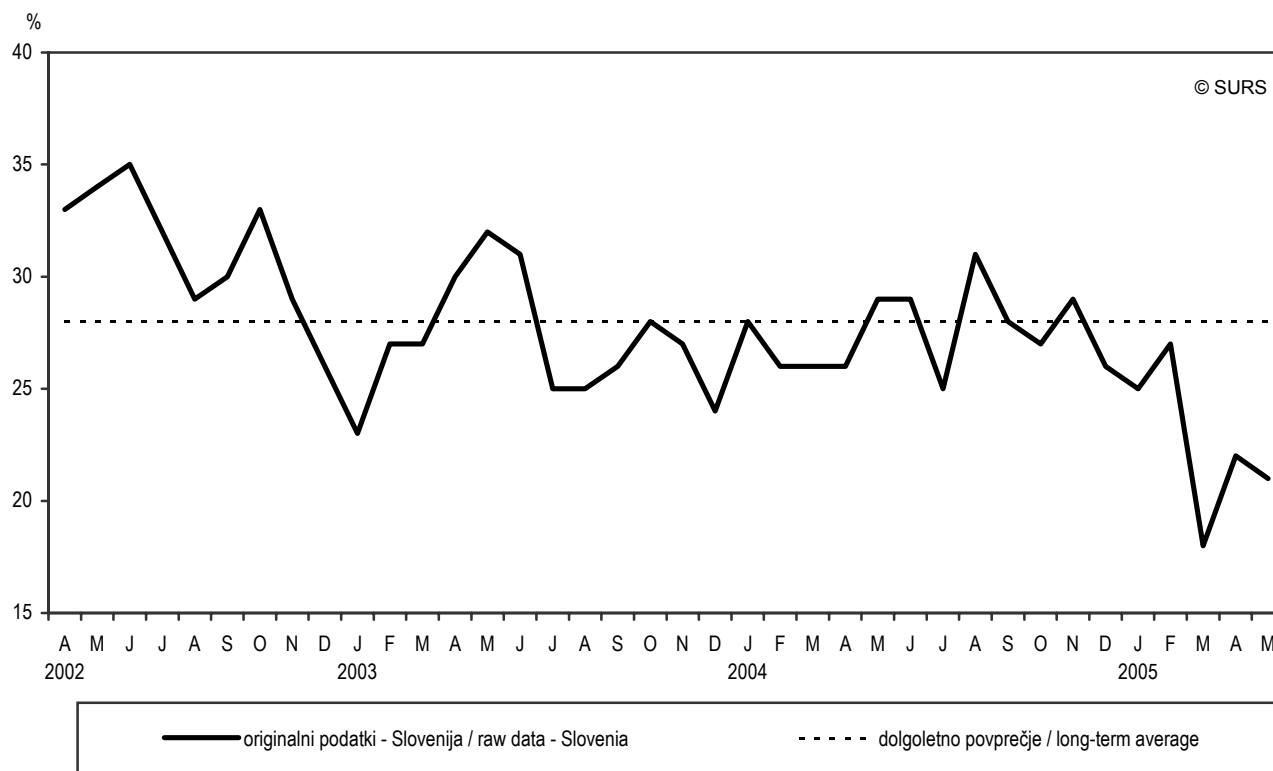
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, MAJ 2005

BUSINESS TENDENCY IN SERVICES, SLOVENIA, MAY 2005

- ▶ V maju 2005 je padel kazalec zaupanja v storitvenih dejavnostih v vseh treh primerjavah. V primerjavi s preteklim mesecem je padel za 1 odstotno točko, v primerjavi z majem 2004 za 8 odstotnih točk in v primerjavi z lanskim povprečjem za 7 odstotnih točk.
- ▶ Na padec kazalca zaupanja v storitvenih dejavnostih je vplivala predvsem ocena o slabšem pričakovanem povpraševanju, saj je bila zabeležena ocena o izboljšanju sedanjega poslovnega položaja in sedanjega povpraševanja.
- ▶ Vsi kazalci stanj so se izboljšali, kazalci pričakovanj pa poslabšali.
- ▶ In May 2005 a fall of the service confidence indicator was registered in all three comparisons. Compared to the previous month it fell by 1 percentage point, compared to May 2004 by 8 percentage points and compared to last year's average by 7 percentage points.
- ▶ The fall of the services confidence indicator was mostly driven by a worsening in the assessment of the *expected demand* as the improvement in the assessment of the *present business situation* and *present demand* was recorded.
- ▶ All situation indicators improved while all expectation indicators worsened.

1. KAZALEC ZAUPANJA<sup>1)</sup> V SLOVENIJI, APRIL 2002 – MAJ 2005

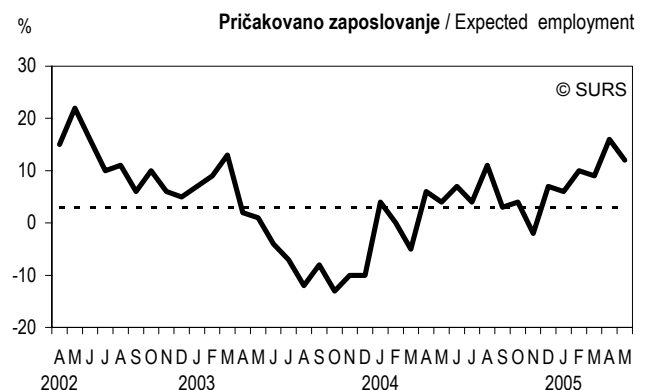
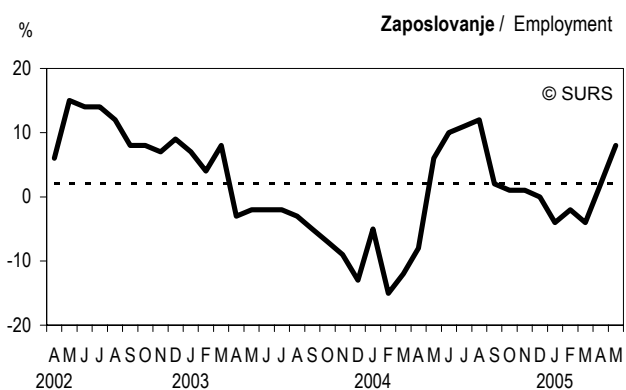
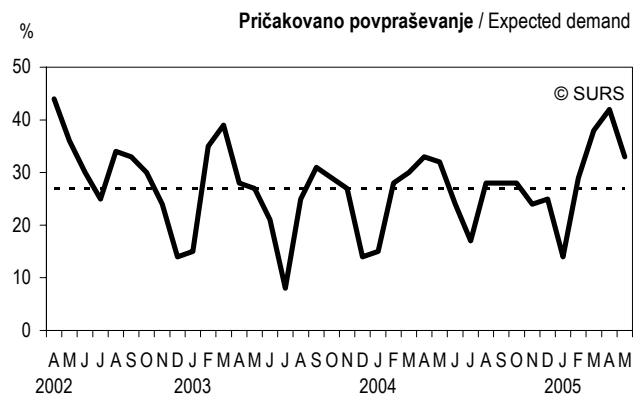
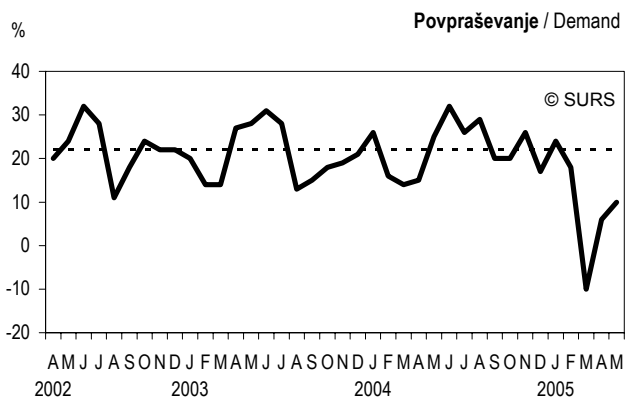
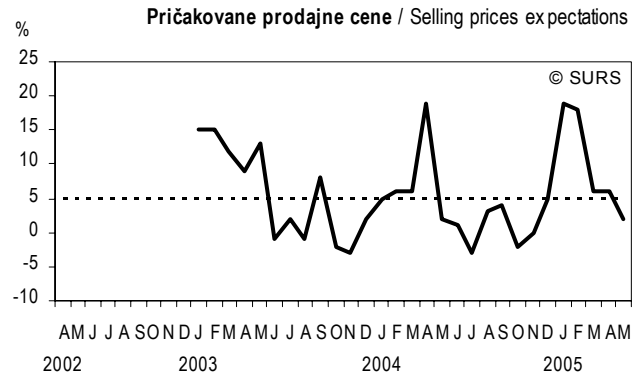
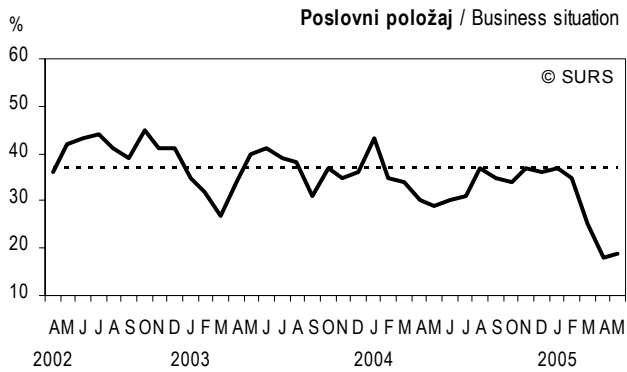
CONFIDENCE INDICATOR<sup>1)</sup> IN SLOVENIA, APRIL 2002 – MAY 2005



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 – MAJ 2005**

EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN SLOVENIA, APRIL 2002 - MAY 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

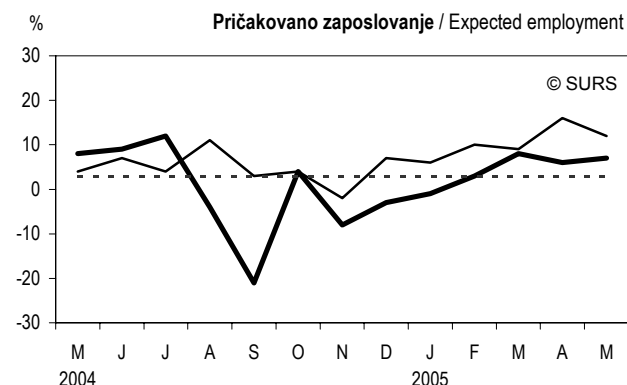
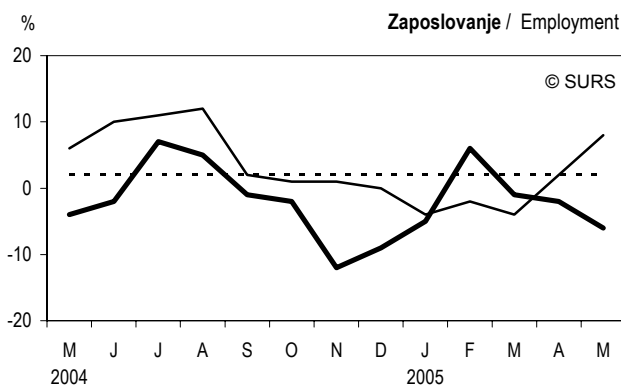
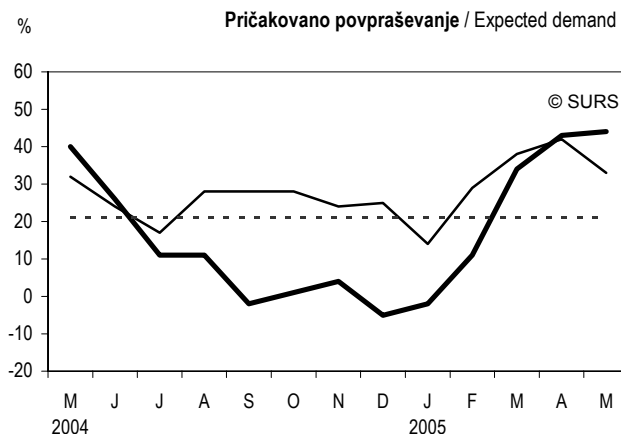
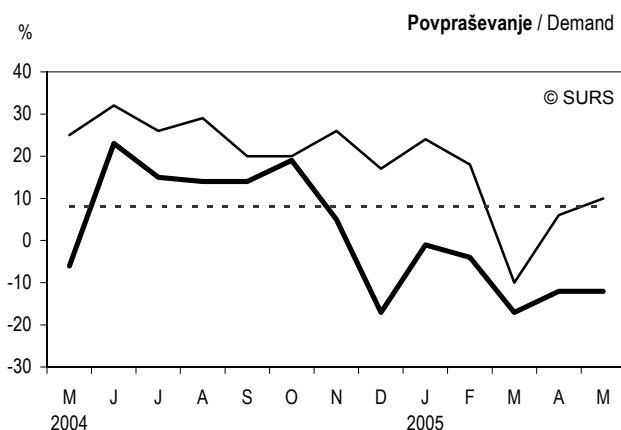
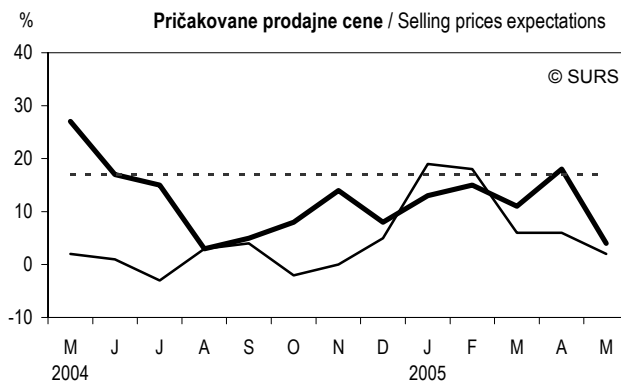
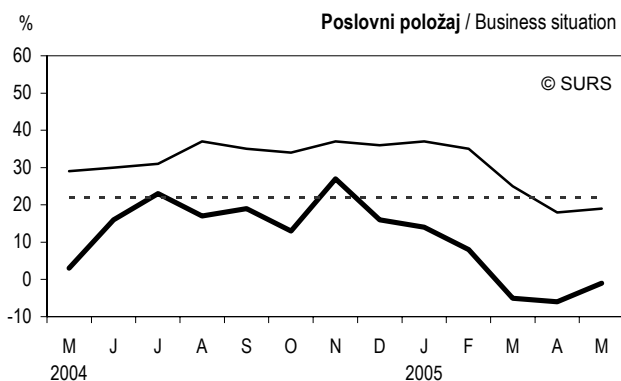


## 2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, maj 2004 - maj 2005

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

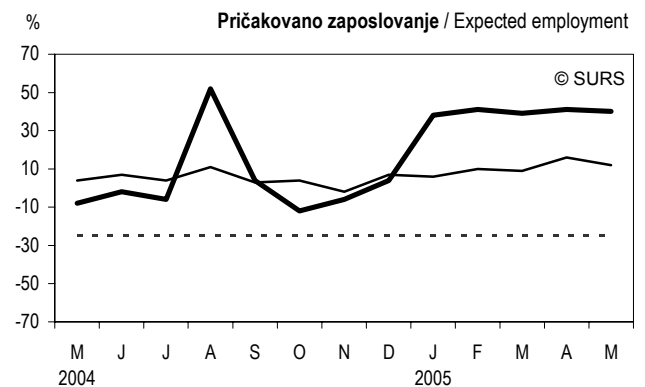
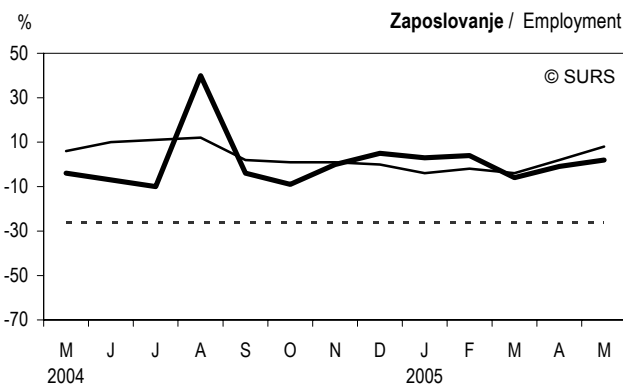
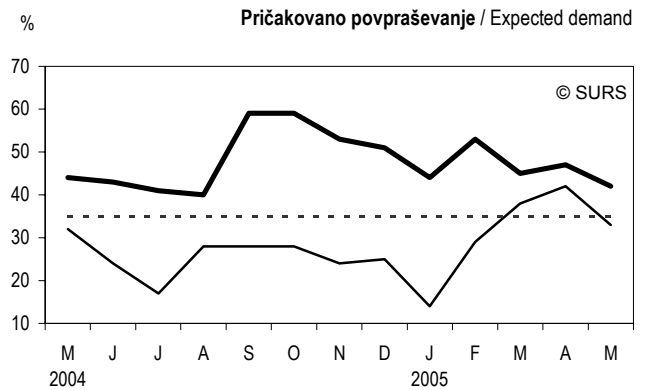
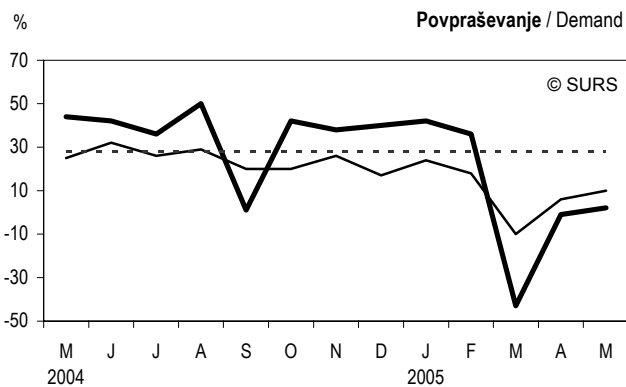
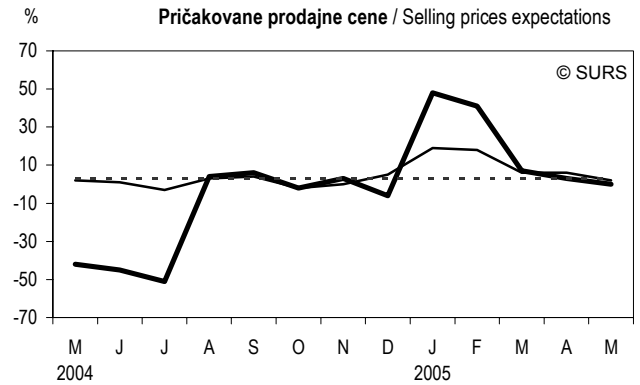
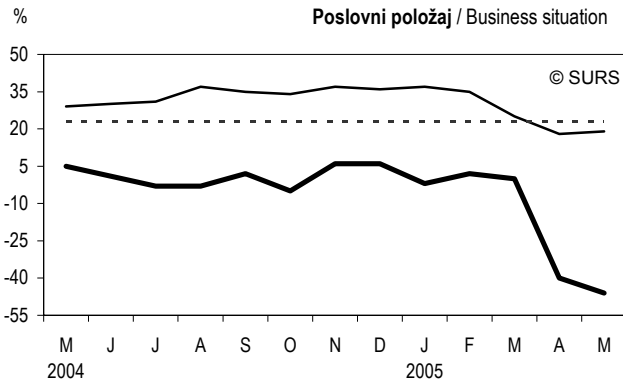
- - - - - dolgoletno povprečje  
long-term average




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

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

## Ocena stanj / Appreciation of situation

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



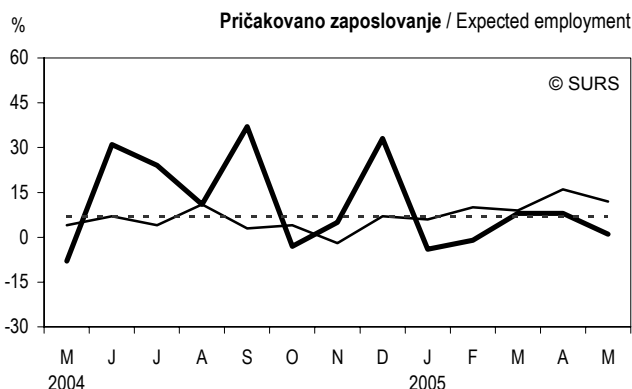
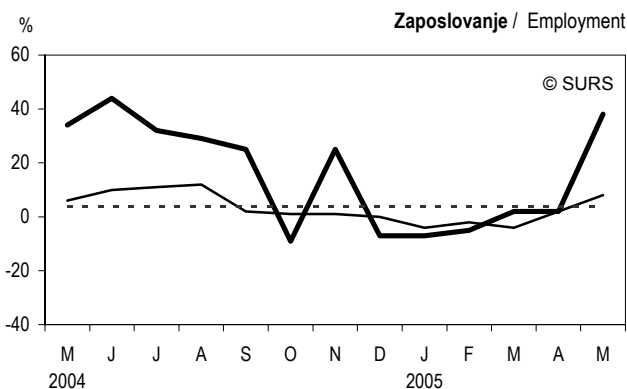
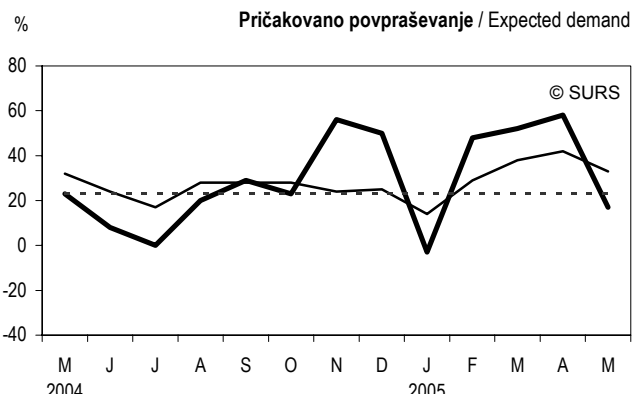
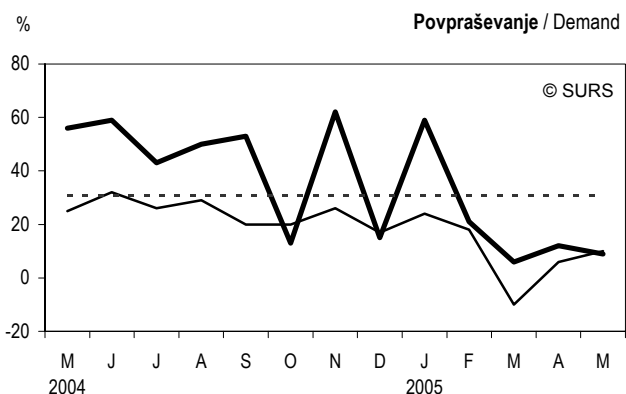
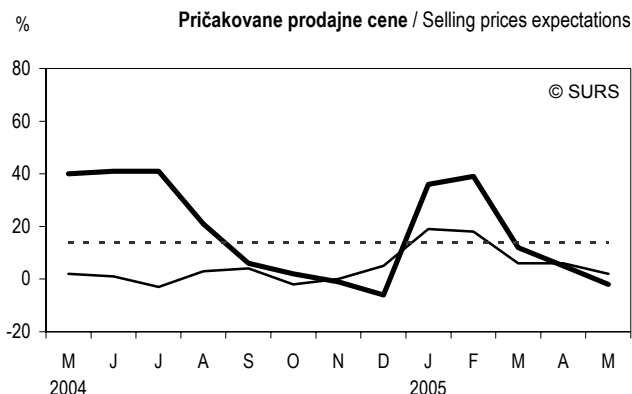
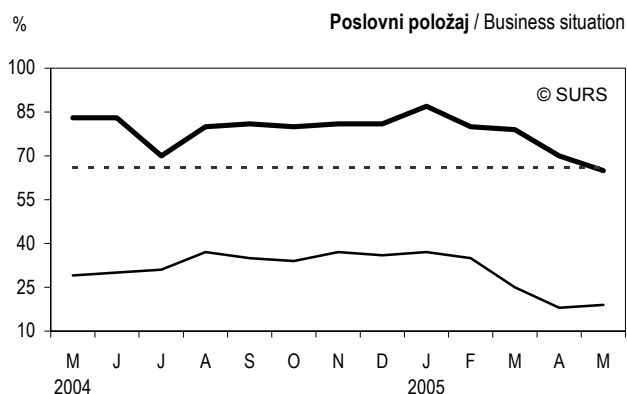
 kopenski, vodni in zračni promet land, water and air transport	 storitvene dejavnosti services	 dolgoletno povprečje long-term average
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### 2.3 Gibanje ekonomskih kazalcev za dejavnost pošte, telekomunikacij in obdelava podatkov, maj 2004 - maj 2005

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

#### Ocena stanj / Appreciation of situation

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



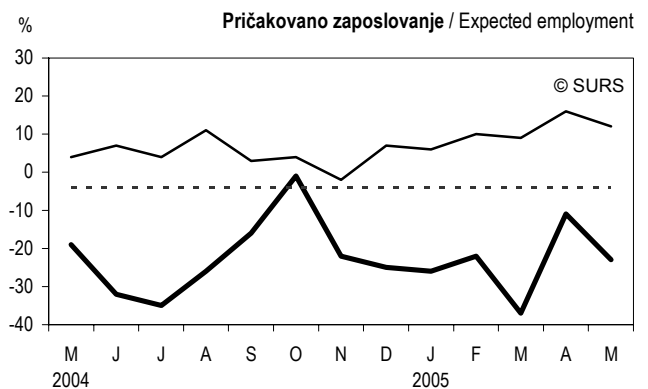
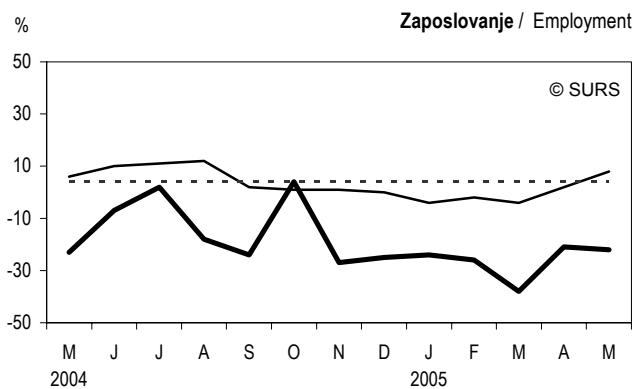
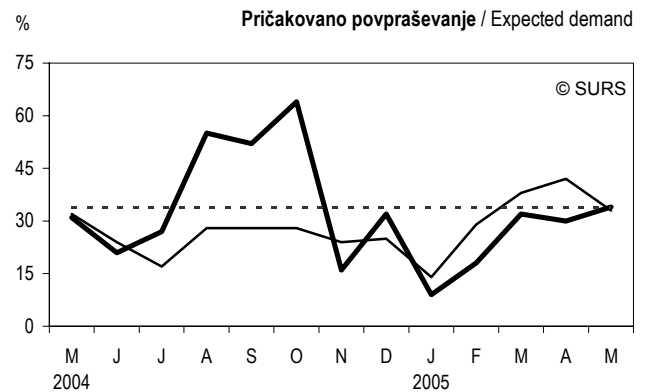
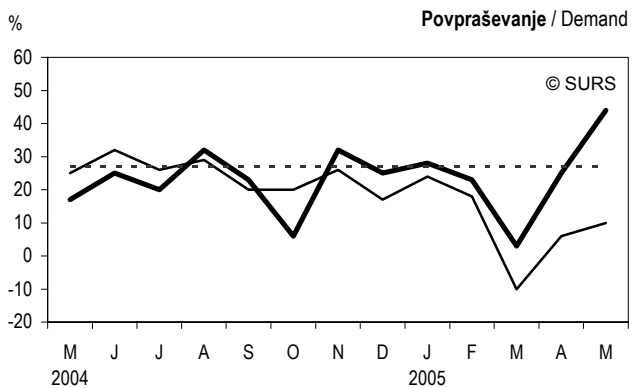
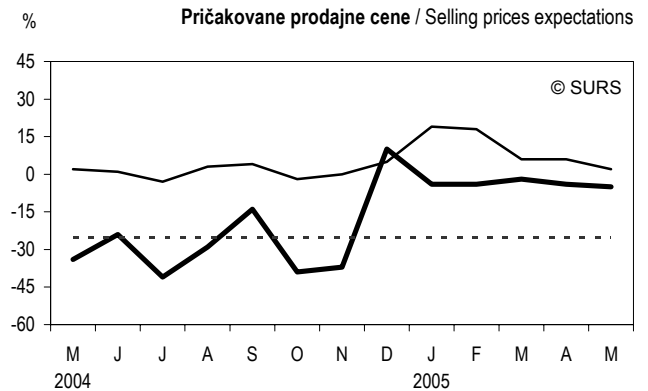
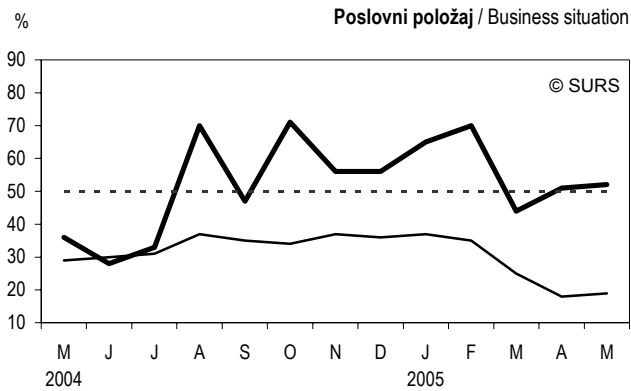
pošta, telekomunikacije in obdelava podatkov post and telecommunication, data processing	storitvene dejavnosti services	dolgoletno povprečje long-term average
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## 2.4 Gibanje ekonomskih kazalcev za dejavnost finančno posredništvo, maj 2004 - maj 2005

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

## Ocena stanj / Appreciation of situation

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



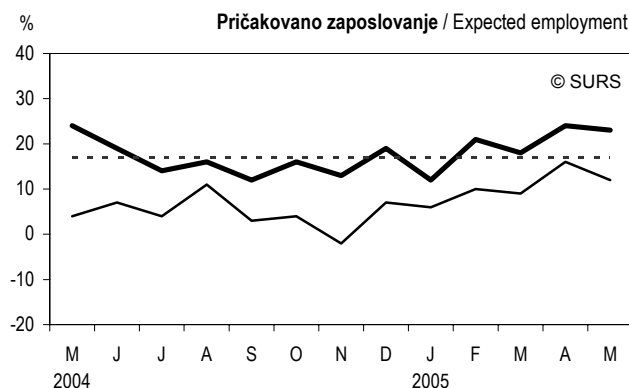
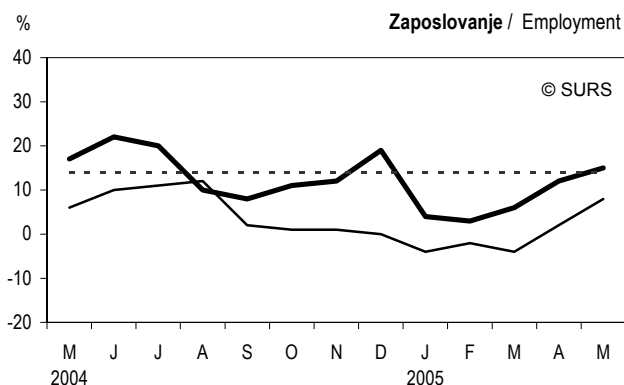
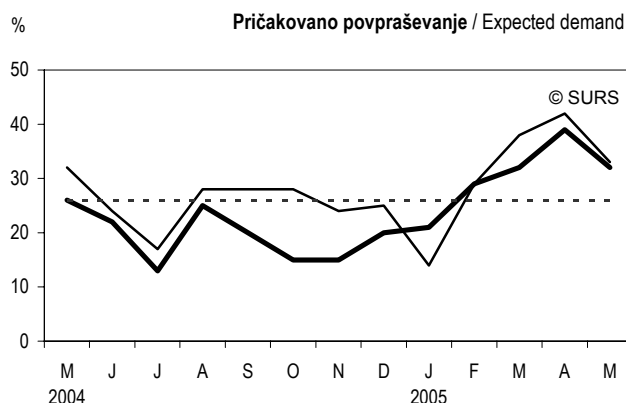
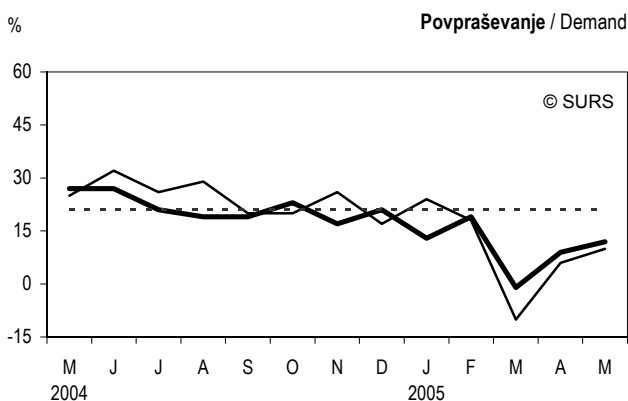
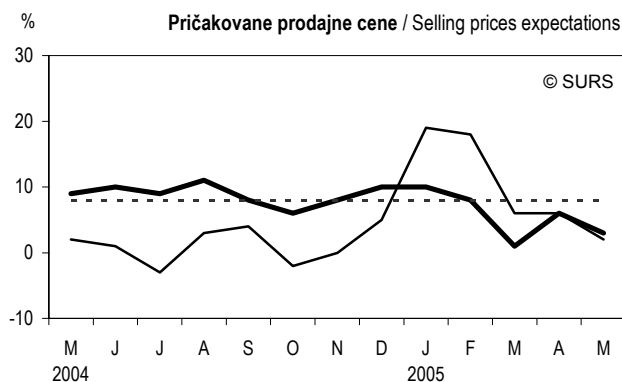
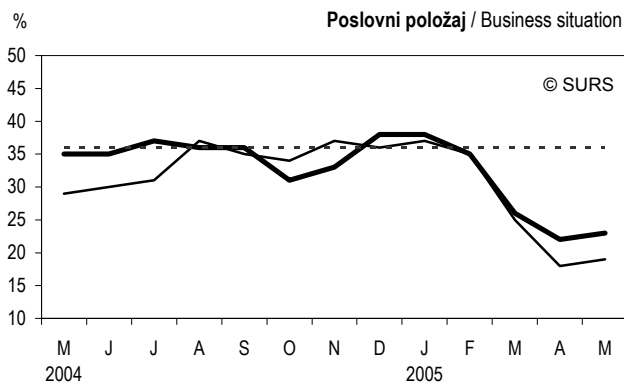
—	finančno posredništvo financial intermediation	—	storitvene dejavnosti services	- - - -	dolgoletno povprečje long-term average
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## 2.5 Gibanje ekonomskih kazalcev za dejavnost poslovanje z nepremičninami, najem in poslovne storitve, maj 2004 - maj 2005

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

### Ocena stanj / Appreciation of situation

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

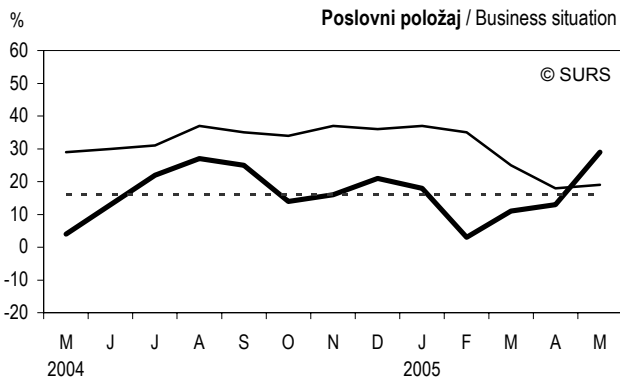


poslovanje z nepremičninami, najem in poslovne storitve real estate activities, renting and business services	storitvene dejavnosti services	dolgoletno povprečje long-term average
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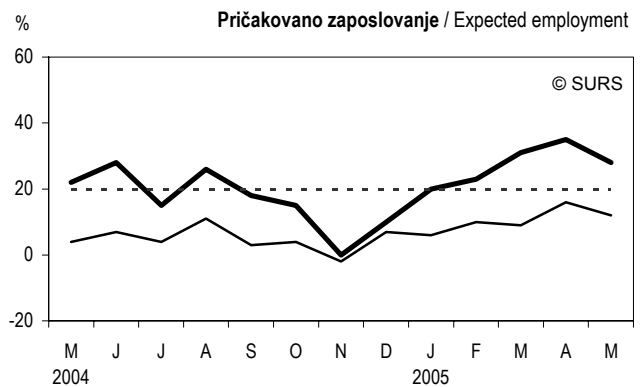
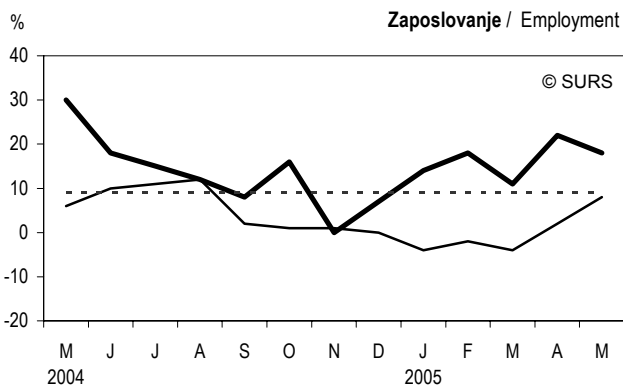
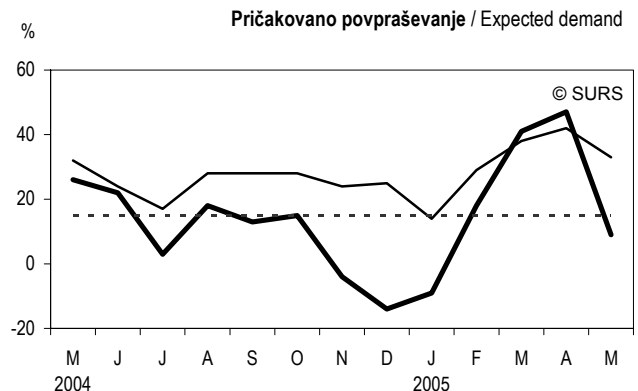
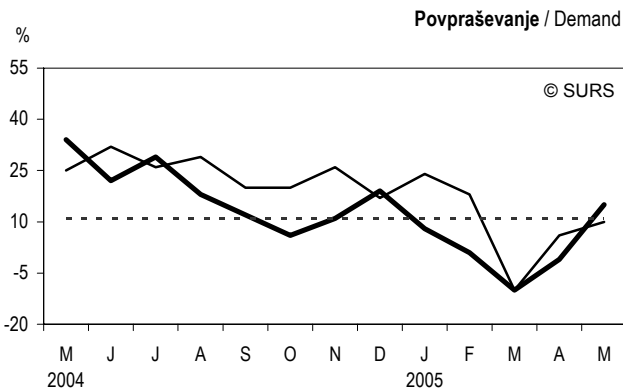
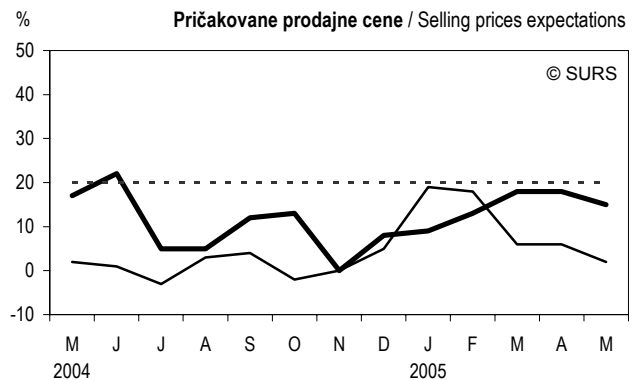
## 2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, maj 2004 - maj 2005

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

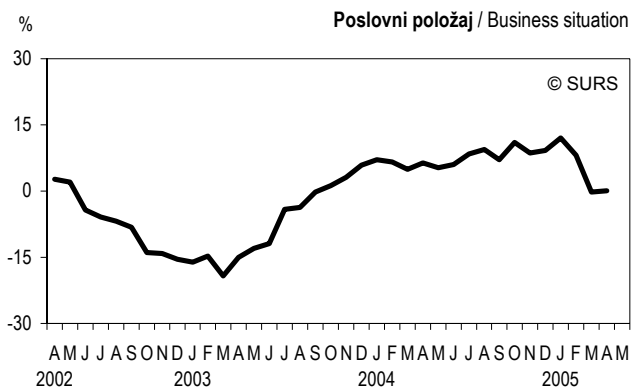
- - - dolgoletno povprečje  
long-term average



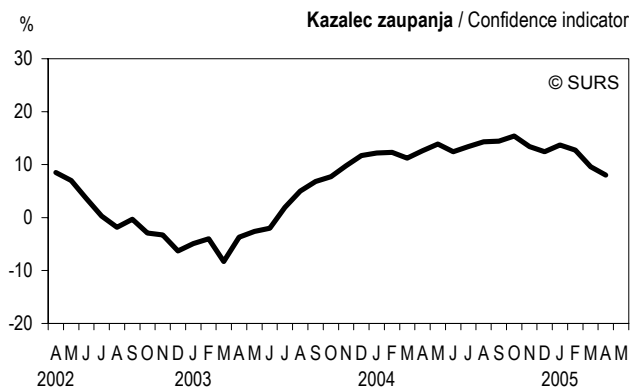


### 3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU<sup>1)</sup>, APRIL 2002 – MAJ 2005 EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN EU<sup>1)</sup>, APRIL 2002 – MAY 2005

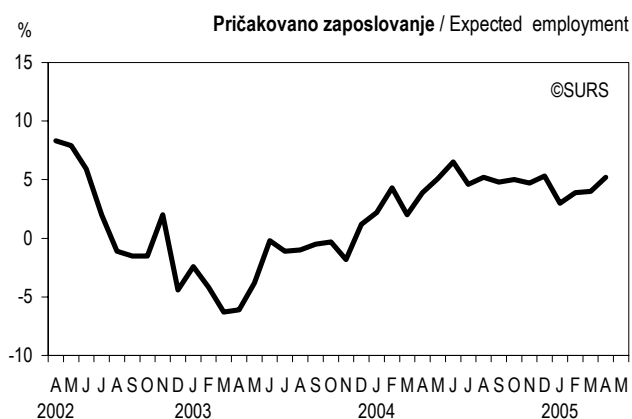
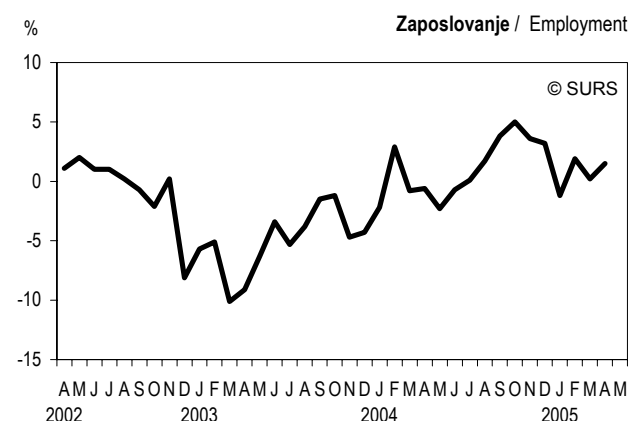
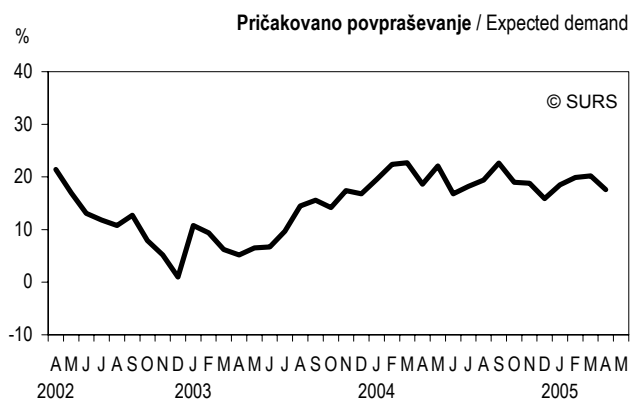
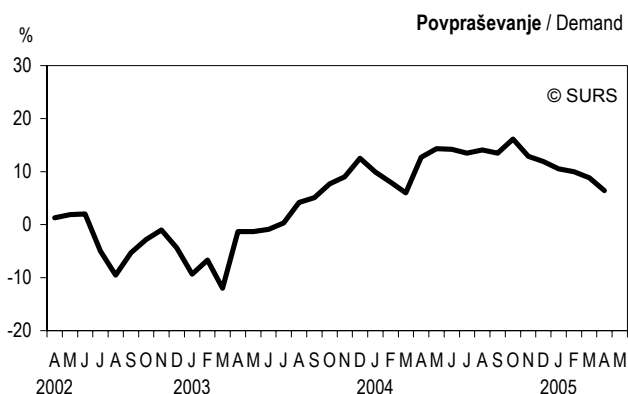
#### Ocena stanj / Appreciation of situation



#### 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](http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm)).  
Podatki so desezonirani. 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](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 (SCA):

- 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. Grafikoni prikazujejo 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?

## KOMENTAR

V maju 2005 je kazalec zaupanja v storitvenih dejavnostih padel v primerjavi s preteklim mesecem za 1 odstotno točko. Na padec kazalca je vplivala predvsem ocena o slabšem pričakovanem povpraševanju, saj je bila zabeležena ocena o izboljšanju sedanjega poslovnega položaja in sedanjega povpraševanja. V primerjavi z majem 2004 je kazalec padel za 8 odstotnih točk in v primerjavi z lanskim povprečjem za 7 odstotnih točk.

## 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?

## COMMENT

In May 2005 a fall of the service confidence indicator was registered compared to the previous month, i.e. by 1 percentage point. This fall of the indicator was mostly driven by a worsening in the assessment of the expected demand as the improvement in the assessment of the present business situation and present demand was recorded. Compared to May 2004 the indicator fell by 8 percentage points and compared to last year's average by 7 percentage points.



## POSLOVNI POLOŽAJ

V primerjavi s prejšnjim mesecem se je poslovni položaj v zadnjih treh mesecih nekoliko izboljšal, saj je bil ta kazalec višji za 1 odstotno točko. Glede na isti mesec lanskega leta in glede na lansko povprečje je kazalec izrazito padel, in sicer za 10 oziroma 15 odstotnih točk.

## POVPRAŠEVANJE

V zadnjih 3 mesecih se je povpraševanje po storitvah povečalo, saj se je kazalec sedanje povpraševanje glede na pretekli mesec zvišal za 4 odstotne točke. Glede na isti mesec lanskega leta je kazalec padel za 15 odstotnih točk in za 12 odstotnih točk glede na lanskoletno povprečje. Po drugi strani pa so bili direktorji zelo pesimistični glede gibanja povpraševanja v naslednjih treh mesecih, saj je kazalec pričakovanega povpraševanja v primerjavi z aprilom 2005 padel za 9 odstotnih točk. Glede na maj 2004 je kazalec zrastel za 1 odstotno točko in glede na lansko povprečje za 7 odstotnih točk.

## ZAPOSLOVANJE

V maju 2005 so direktorji ocenili, da se je zaposlovanje v zadnjih 3 mesecih povečalo. Kazalec zaposlovanja je bil za 6 odstotnih točk višji kot prejšnji mesec, v primerjavi z istim mesecem lanskega leta višji za 2 odstotni točki in za 8 odstotnih točk nad lanskim povprečjem. Kazalec pričakovanega zaposlovanja kaže na zmanjšanje zaposlovanja v naslednjih treh mesecih, in sicer vsaj v primerjavi s preteklim mesecem, kajti vrednost kazalca je padla za 4 odstotne točke. Vendar je bil kazalec v primerjavi z istim mesecem lani in z lanskim povprečjem višji za 8 odstotnih točk.

## PRODAJNE CENE

Direktorji so v maju 2005 ocenili, da se bodo v naslednjih treh mesecih prodajne cene v storitvenih dejavnostih zmanjšale za 4 odstotne točke v primerjavi s preteklim mesecem. Kazalec pričakovane prodajne cene je ostal enak glede na maj 2004 in se je v primerjavi z lanskim povprečjem znižal za 2 odstotni točki.

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## BUSINESS SITUATION

Business situation in the past three months slightly improved as this indicator went up by 1 percentage point in comparison with the previous month. Compared to May 2004 and to last year's average it went down noticeably, i.e. by 10 and 15 percentage points, respectively.

## DEMAND

In the past three months demand for services grew while the indicator of the present demand rose by 4 percentage points compared to the previous month. Compared to May 2004 it dropped by 15 percentage points and compared to last year's average by 12 percentage points. On the other hand, managers were very pessimistic about the demand developments in the next three months as the expected demand indicator fell by 9 percentage points compared to April 2005. Compared to May 2004 the indicator rose by 1 percentage point and compared to last year's average by 7 percentage points.

## EMPLOYMENT

According to managers' estimates in May 2005, employment increased in the past three months. The employment indicator was namely 6 percentage points higher than in the previous month, 2 percentage points higher than in May 2004 and it was 8 percentage points above last year's average. According to the expected employment indicator the employment will fall in the next three months, at least in comparison with the previous month as the indicator fell by 4 percentage points. But compared to May 2004 and to last year's average it was higher for 8 percentage points.

## SELLING PRICES

In May 2005 managers estimated that selling prices in the next three months would be reduced for 4 percentage points in comparison with previous month. This indicator stayed the same in comparison with May 2004 and it was down by 2 percentage points compared to last year's average.

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