



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

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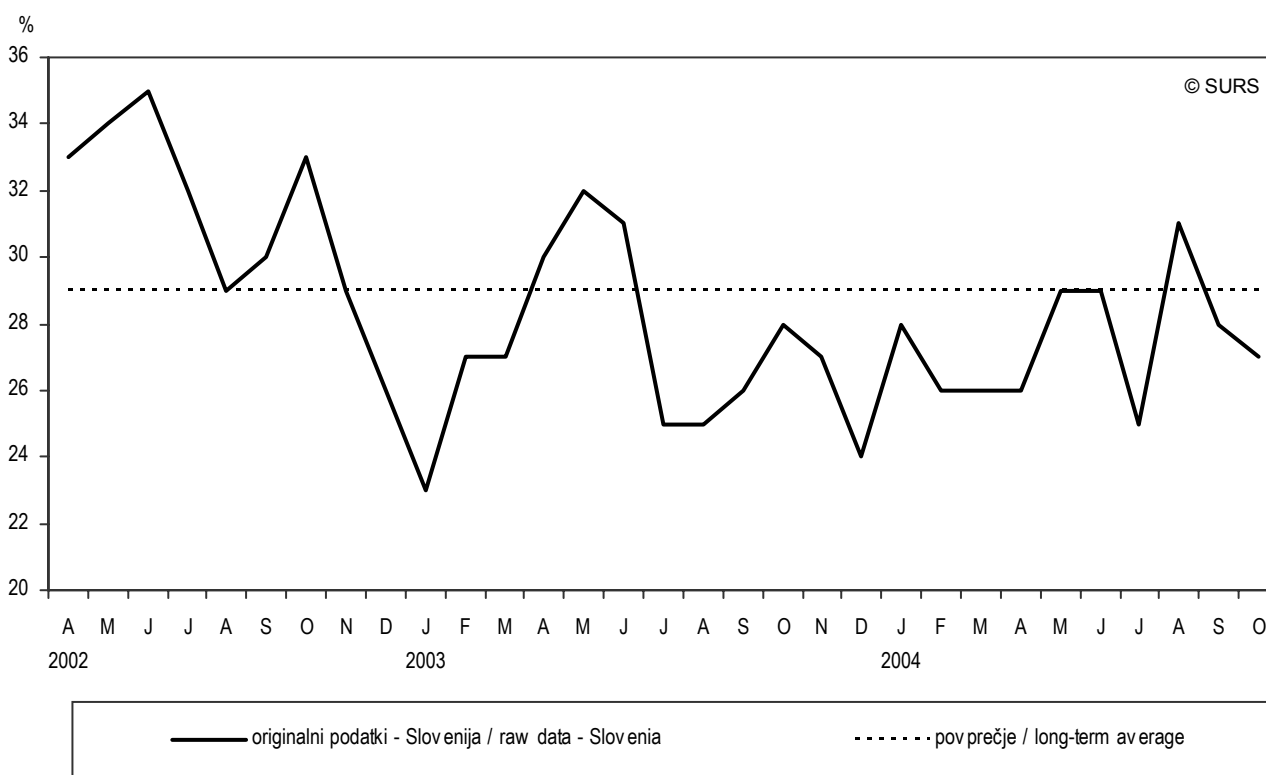
**POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, APRIL 2002 – OKTOBER 2004**

BUSINESS TENDENCY IN SERVICES, SLOVENIA, APRIL 2002 – OCTOBER 2004

- ▶ V oktobru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 1 odstotno točko tako v primerjavi s preteklim mesecem kot tudi glede na isti mesec lanskega leta. Glede na lansko povprečje pa je vrednost kazalca ostala nespremenjena.
- ▶ Na gibanje kazalca zaupanja je vplivala predvsem ocena sedanjega poslovnega položaja.
- ▶ Večina kazalcev se je poslabšala. Izboljšal se je le kazalec pričakovanega zaposlovanja, kazalca sedanjega in pričakovanega povpraševanja pa sta ostala enaka.
- ▶ In October 2004 the service confidence indicator fell by 1 percentage point compared to the previous month as well as compared to October 2003. In comparison to last year's average its value remained the same.
- ▶ The evolution of the confidence indicator was mostly influenced by the present business situation.
- ▶ Most indicators deteriorated. Only the indicator of expected employment improved. The present and expected demand indicators remained unchanged.

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

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



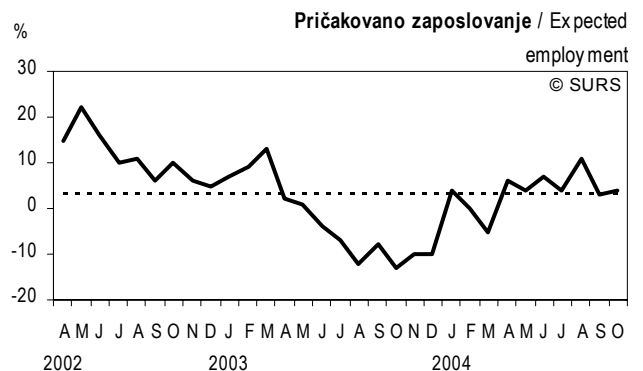
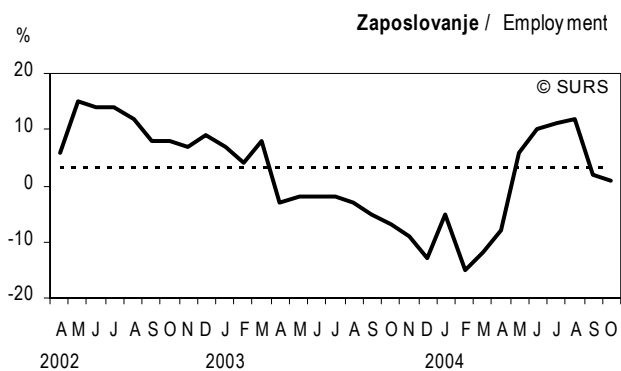
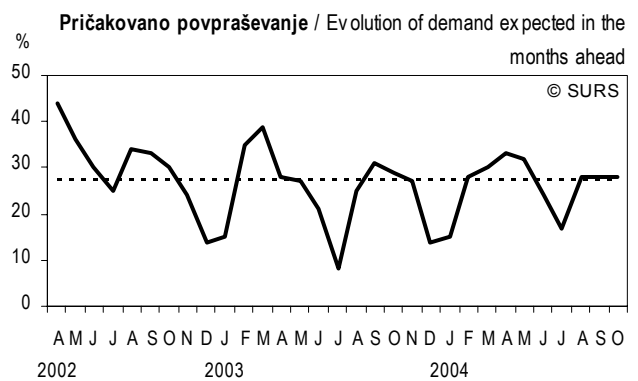
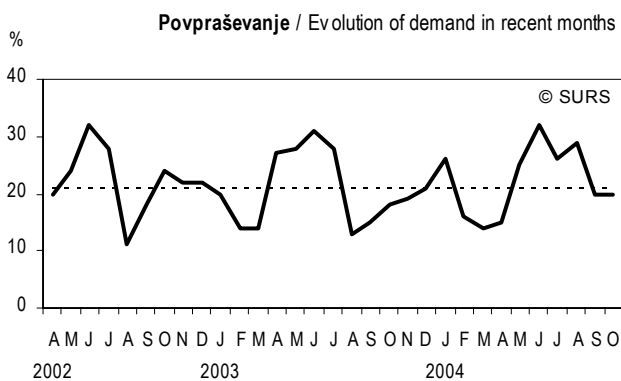
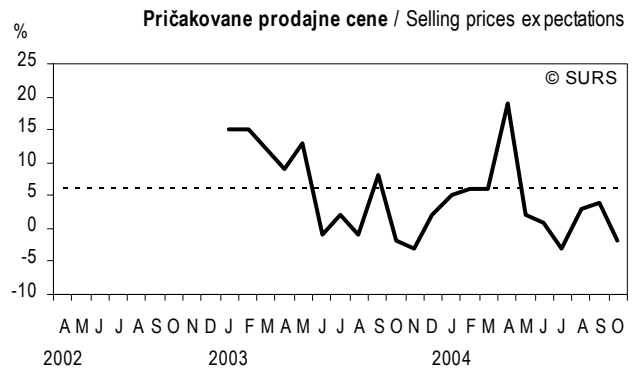
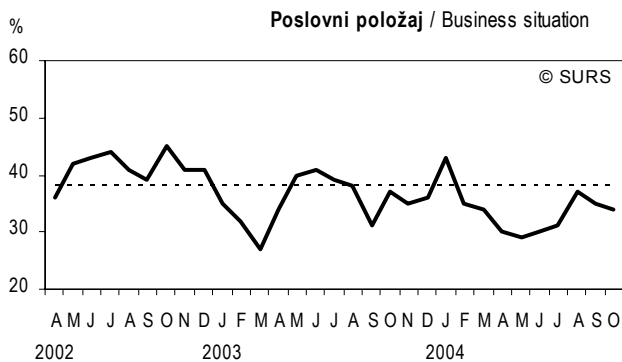
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.  
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

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

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

## Ocena stanj / Appreciation of situation

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



— storitvene dejavnosti  
services

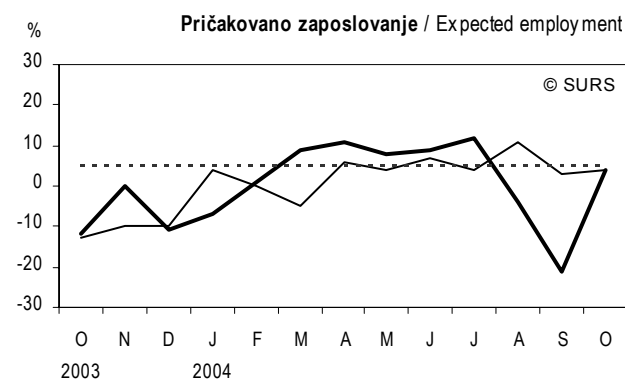
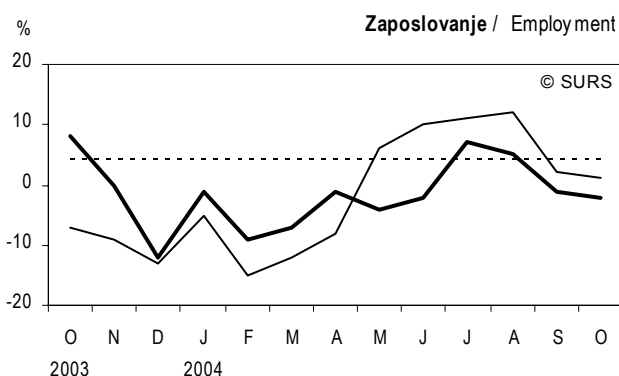
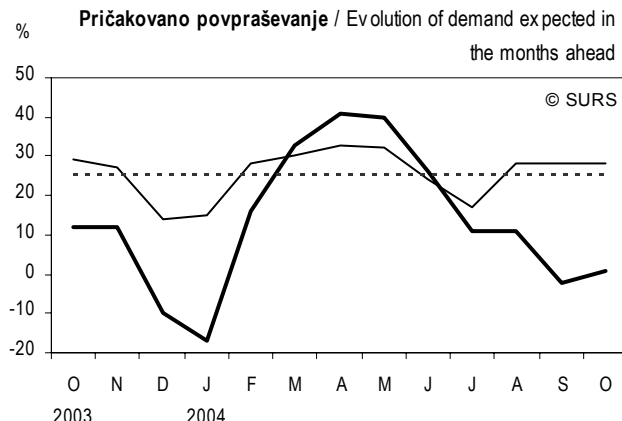
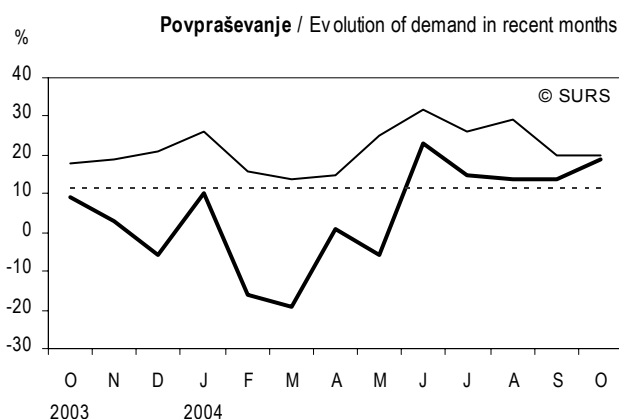
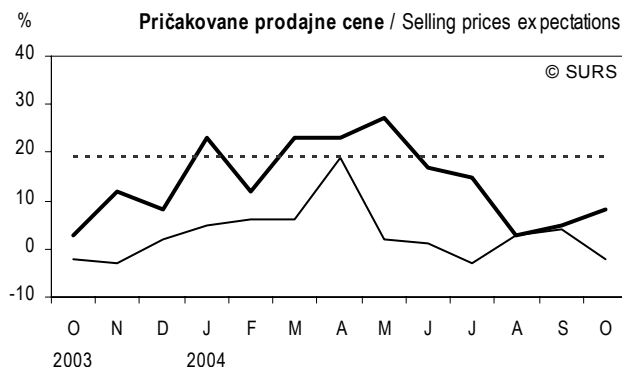
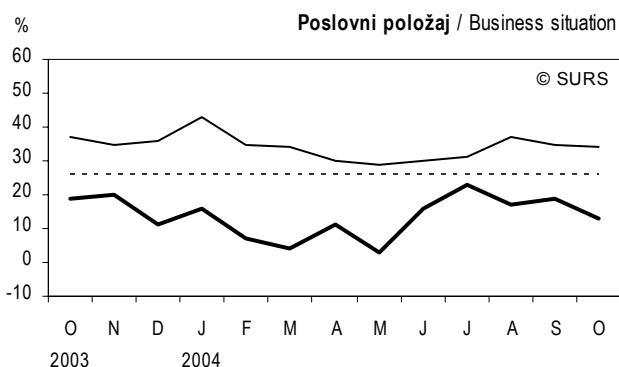
- - - povprečje  
long-term average

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

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

### Ocena stanj / Appreciation of situation

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



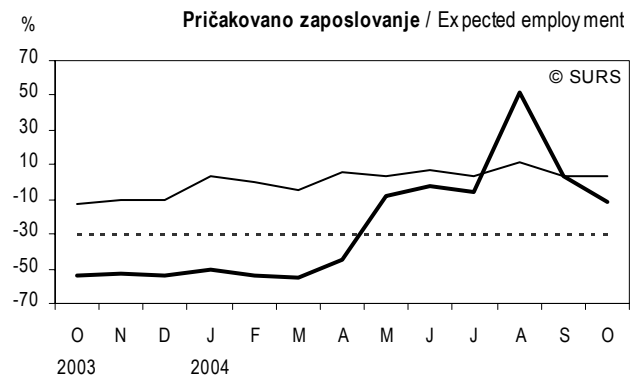
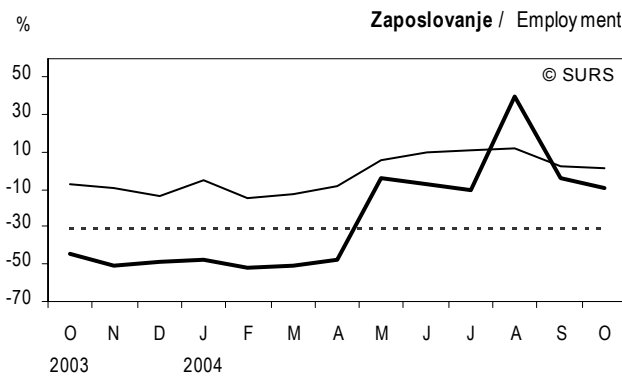
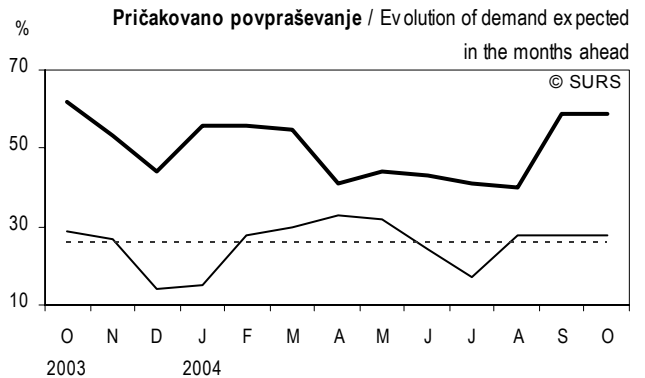
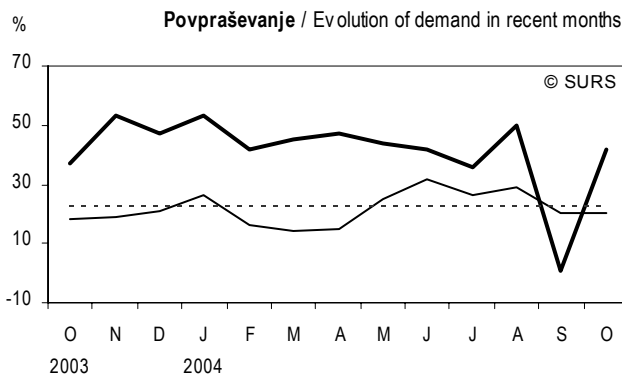
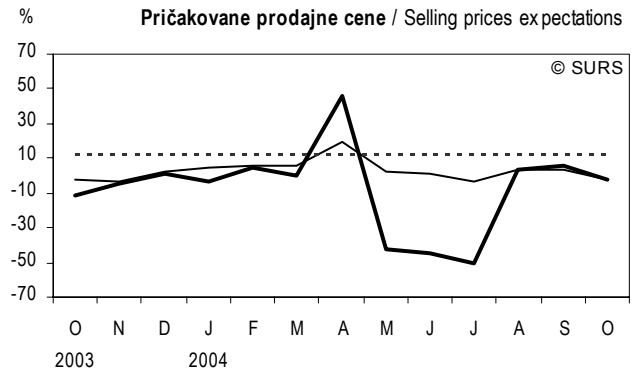
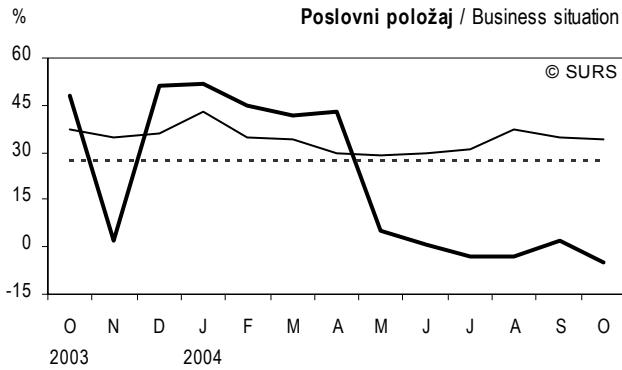
gostinstvo in s turizmom povezane dejavnosti  
hotels and restaurants, and tourist assistance activities
  storitvene dejavnosti  
services
  povprečje  
long-term average

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

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

## Ocena stanj / Appreciation of situation

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

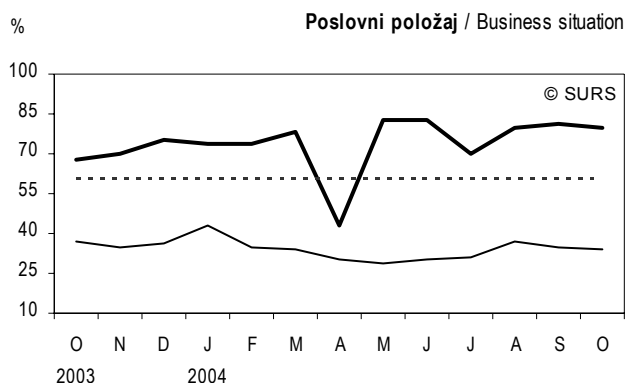


kopenski, vodni in zračni promet land, water and air transport	storitvene dejavnosti services	povprečje long-term average
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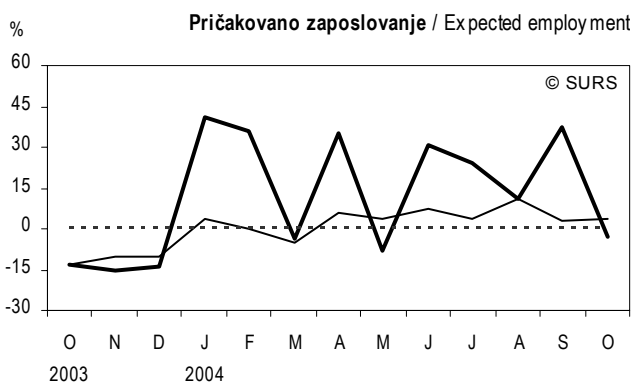
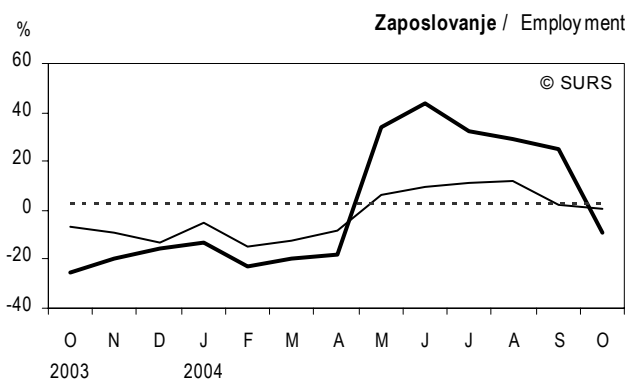
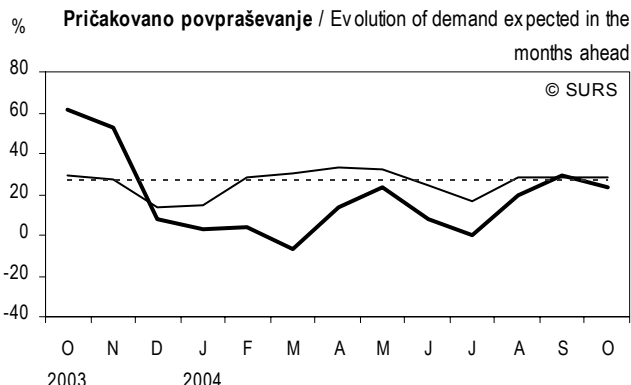
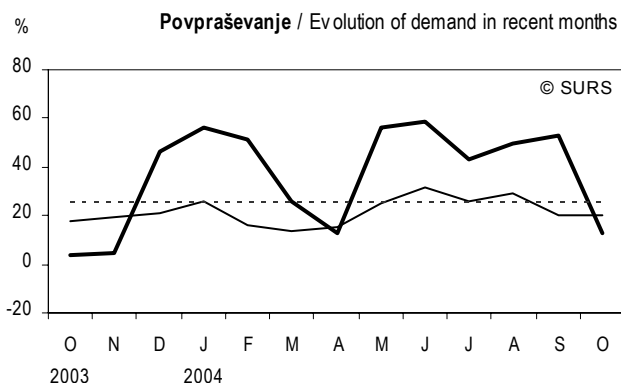
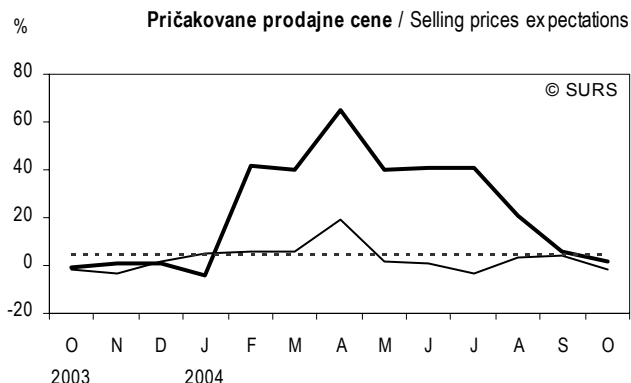
### 2.3 Gibanje ekonomskih kazalcev za dejavnost: pošte, telekomunikacij in obdelava podatkov, oktober 2003 - oktober 2004

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

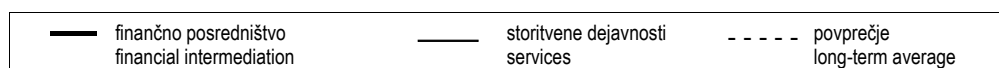
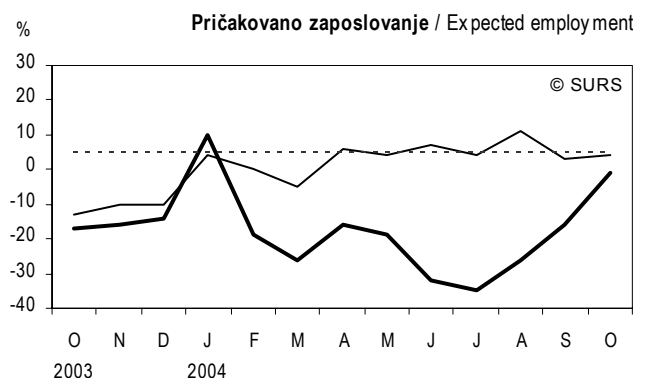
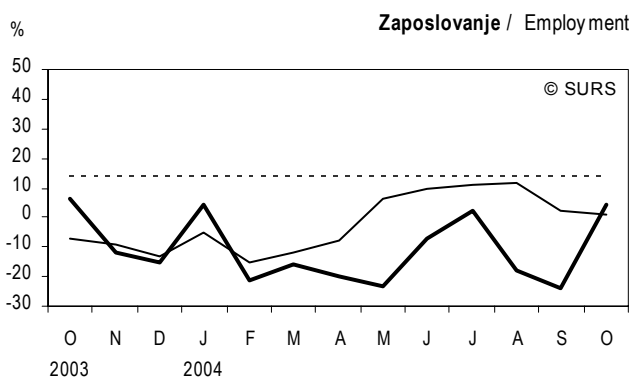
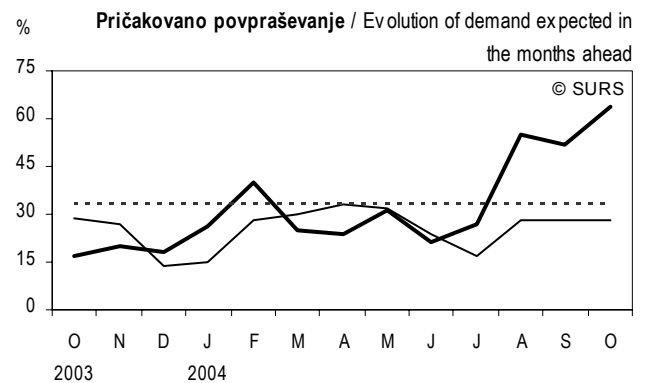
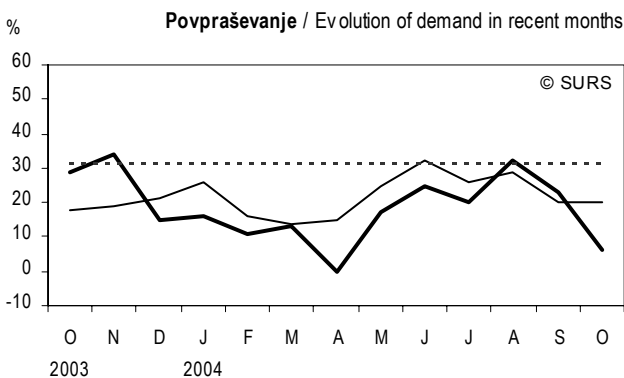
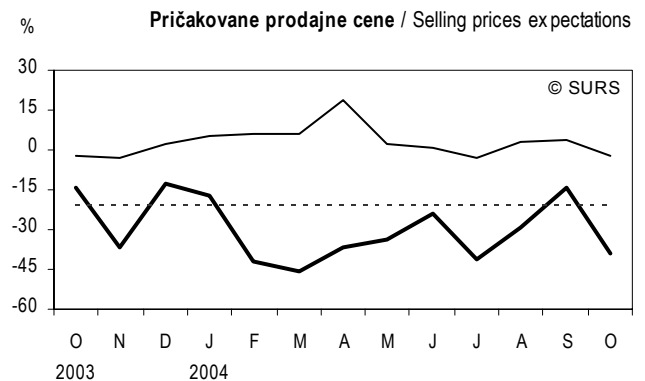
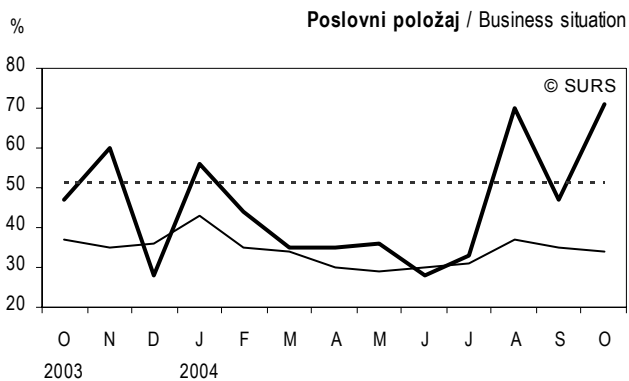
- - - povprečje  
long-term average

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

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

## Ocena stanj / Appreciation of situation

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

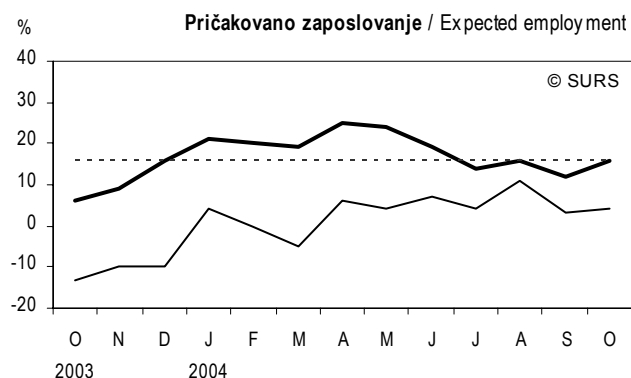
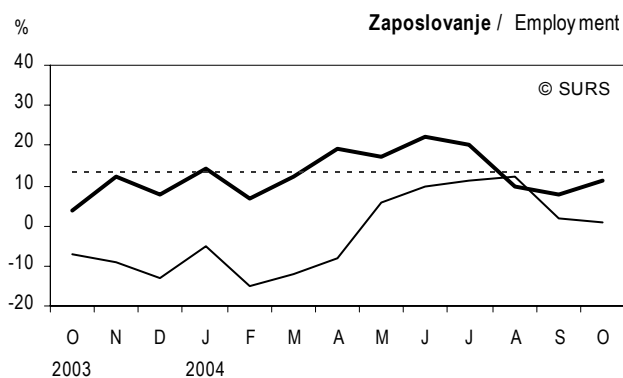
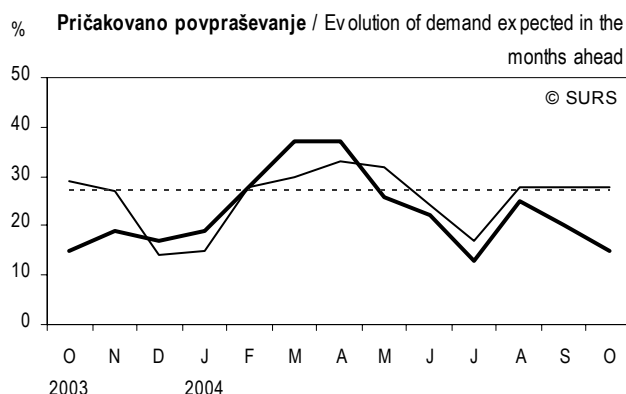
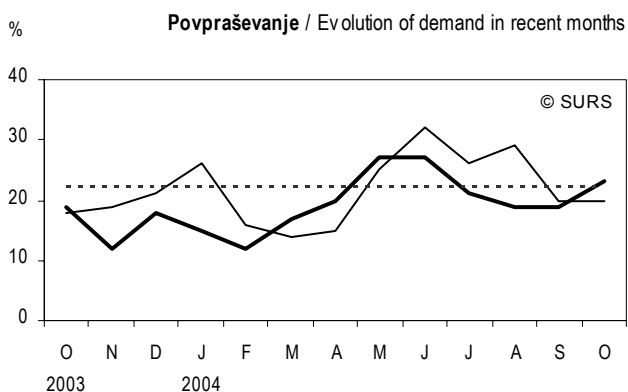
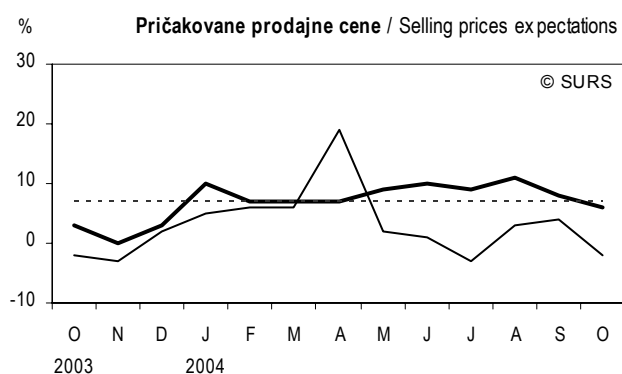
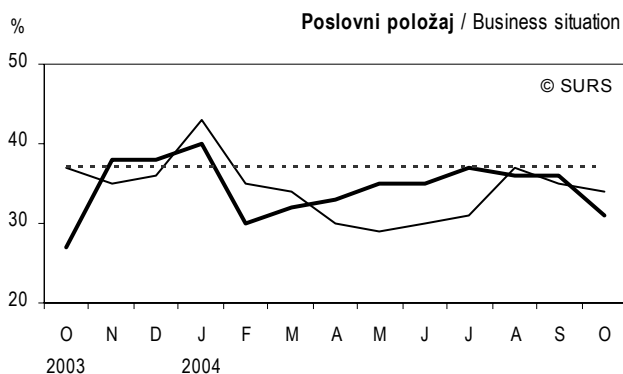


## 2.5 Gibanje ekonomskih kazalcev za dejavnost: poslovanje z nepremičninami, najem in poslovne storitve, oktober 2003 - oktober 2004

Evolution of economic indicators in real estate activities, renting and business services, October 2003 - October 2004

### 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

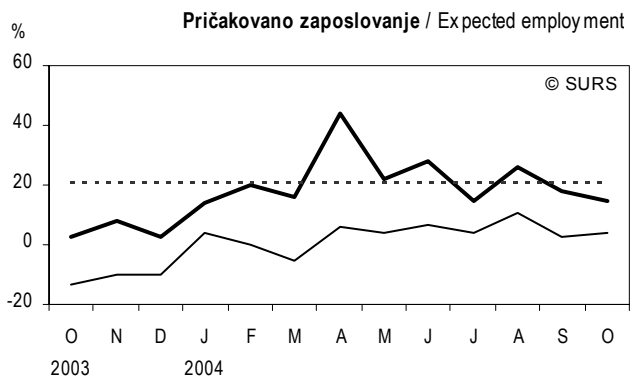
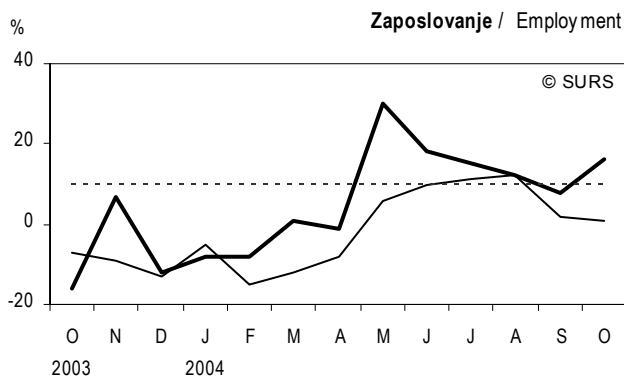
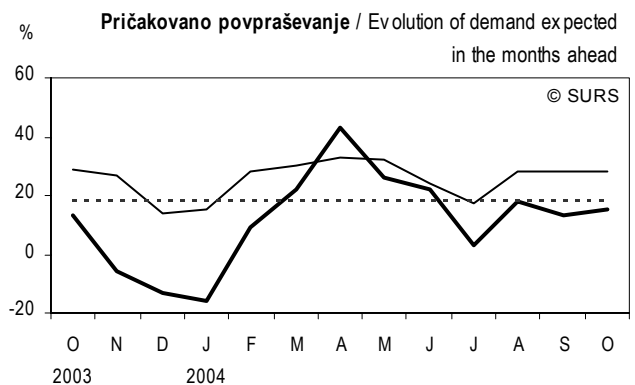
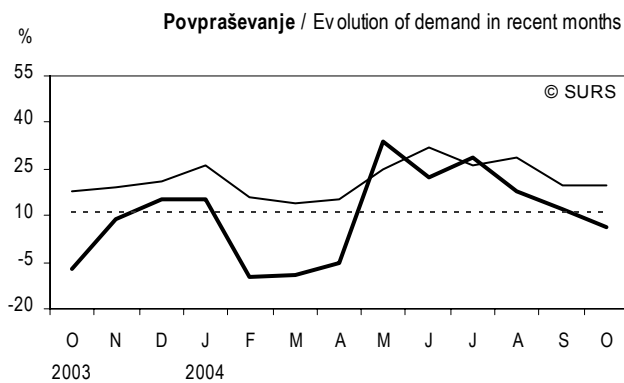
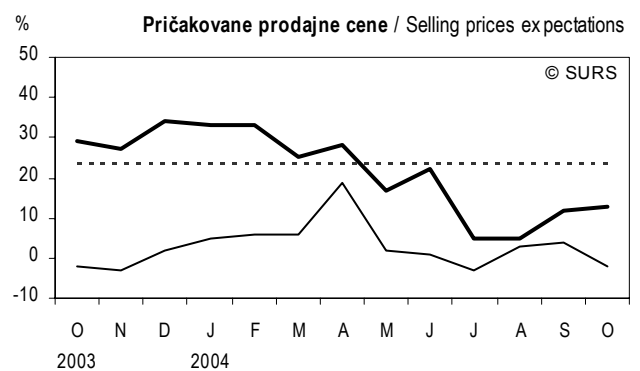
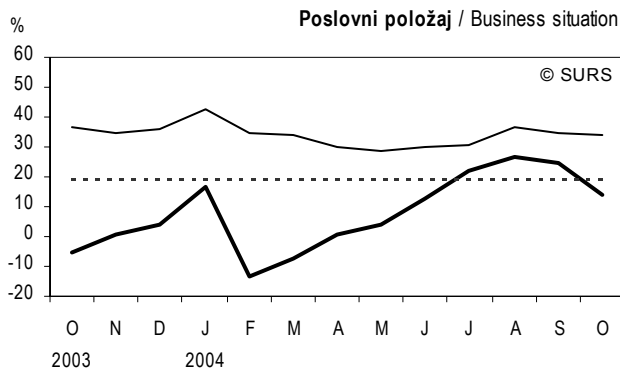
- - - povprečje  
long-term average

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

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

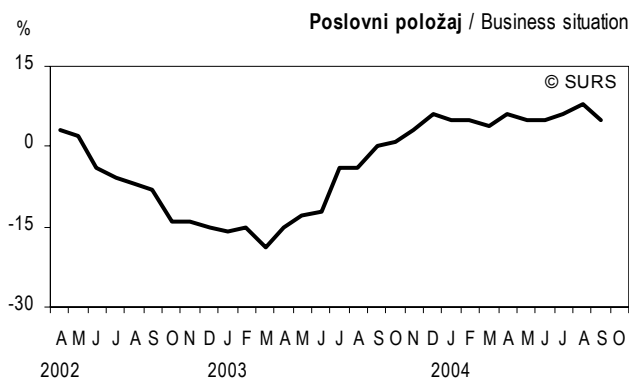
- - - dolgoletno povprečje  
long-term average



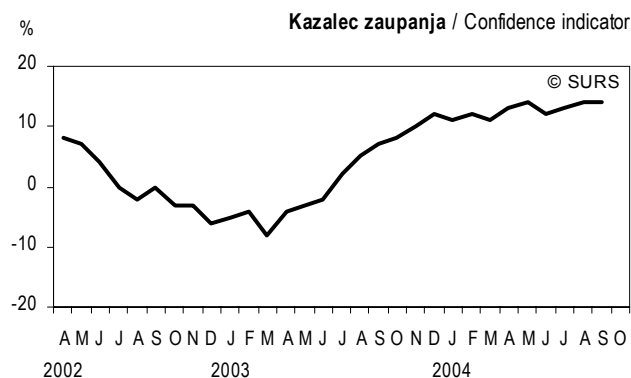


### 3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU<sup>1)</sup>, APRIL 2002 – OKTOBER 2004 EVOLUTION OF ECONOMIC INDICATORS IN SERVICE IN THE EU<sup>1)</sup>, APRIL 2002 – OCTOBER 2004

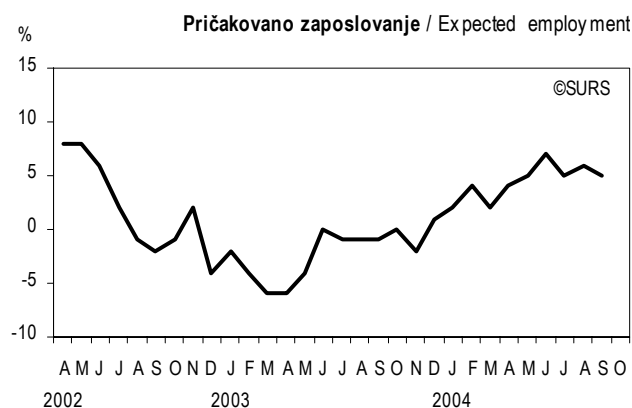
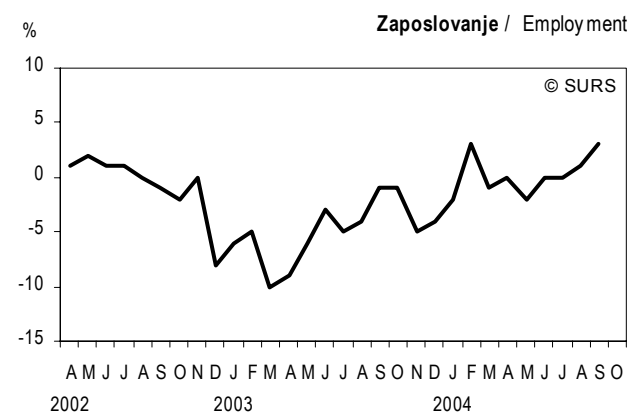
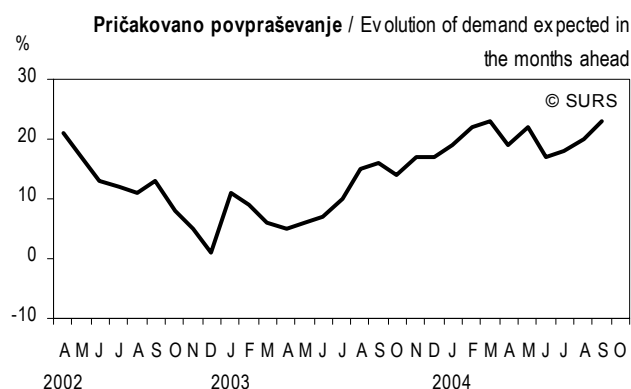
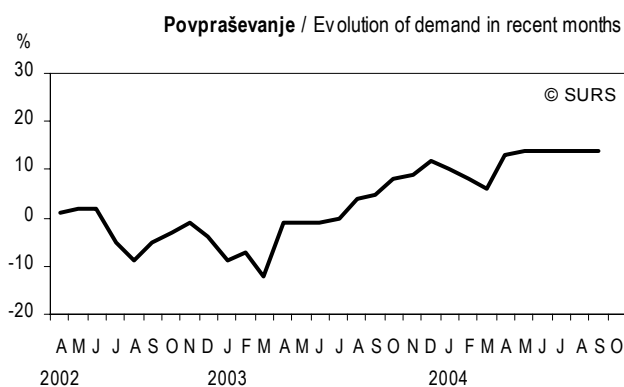
#### Ocena stanj / Appreciation of situation



#### 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. Grafikoni prikazujejo 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 oktobru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 1 odstotno točko tako v primerjavi s preteklim mesecem kot tudi glede na isti mesec lanskega leta. Glede na lansko povprečje pa je vrednost kazalca ostala nespremenjena.

## 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 October 2004 the service confidence indicator fell by 1 percentage point compared to the previous month as well as compared to October 2003. In comparison to last year's average its value remained the same.



Na gibanje kazalca zaupanja je vplivala predvsem ocena sedanjega poslovnega položaja.

Večina kazalcev se je poslabšala. Izboljšal se je le kazalec pričakovanega zaposlovanja, kazalca sedanjega in pričakovanega povpraševanja pa sta ostala enaka.

### POSLOVNI POLOŽAJ

V primerjavi s prejšnjim mesecem se je poslovni položaj v zadnjih treh mesecih rahlo poslabšal, in sicer je bil kazalec za 1 odstotno točko nižji. Tudi glede na isti mesec lanskega leta in glede na lansko povprečje je bil kazalec nižji, in sicer za 3 odstotne točke oziroma 1 odstotno točko.

### POVPRAŠEVANJE

V zadnjih 3 mesecih je ostalo povpraševanje po storitvah nespremenjeno. Glede na isti mesec lanskega leta je bil kazalec za 2 odstotni točki višji in za 1 odstotno točko pod lanskim povprečjem. Po ocenah direktorjev bo ostalo povpraševanje v naslednjih treh mesecih še naprej enako. Glede na oktober 2003 je kazalec pričakovanega povpraševanja padel za 1 odstotno točko, v primerjavi z lanskim povprečjem pa je bila vrednost tega kazalca višja za 3 odstotne točke.

### ZAPOSLOVANJE

V oktobru so direktorji ocenili, da je zaposlovanje v zadnjih 3 mesecih malo padlo. Kazalec zaposlovanja je bil za 1 odstotno točko nižji kot prejšnji mesec. Glede na isti mesec lanskega leta je kazalec zrasel za 8 odstotnih točk, v primerjavi z lanskim povprečjem pa je bila vrednost kazalca višja za 3 odstotne točke. Kazalec pričakovanega zaposlovanja se je izboljšal, in sicer je bil za 1 odstotno točko višji glede na pretekli mesec. V primerjavi z istim mesecem lani se je pričakovano zaposlovanje povečalo za 17 odstotnih točk, glede na lansko povprečje pa za 7 odstotnih točk.

### PRODAJNE CENE

Direktorji ocenjujejo, da se bodo prodajne cene v storitvenih dejavnostih znižale, kajti glede na pretekli mesec je bil kazalec pričakovanih prodajnih cen za 6 odstotnih točk nižji. Glede na isti mesec lanskega leta je ostal kazalec nespremenjen in za 8 odstotnih točki zaostal za lanskim povprečjem.

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The evolution of the confidence indicator was mostly influenced by the present business situation.

Most indicators deteriorated. Only the indicator of expected employment improved. The present and expected demand indicators remained unchanged.

### BUSINESS SITUATION

Compared to the previous month, the business situation in the past three months worsened as this indicator slightly fell by 1 percentage point. Worsening of the indicator was also registered compared to October 2003 and to last year's average, i.e. by 3 and 1 percentage points, respectively.

### DEMAND

In the past three months demand for services remained unchanged. Compared to October 2003 the indicator rose by 2 percentage points and it was 1 percentage point below last year's average. Managers thought that in the next three months the demand would still stay the same. Compared to October 2003 the expected demand indicator declined by 1 percentage point and compared to last year's average its value was 3 percentage points higher.

### EMPLOYMENT

According to managers' estimates in October 2004, employment slightly declined 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 rose by 8 percentage points compared to October 2003 and it was 3 percentage points above last year's average. The expected employment indicator improved as it was 1 percentage point higher than in the previous month. Compared to October 2003 it rose by 17 percentage points and compared to last year's average by 7 percentage points.

### SELLING PRICES

Managers estimated that selling prices would fall in the next few months as the indicator was 6 percentage points lower than in the previous month. Compared to October 2003 it remained the same and it was 8 percentage points below last year's average.

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