



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

št. / No 16

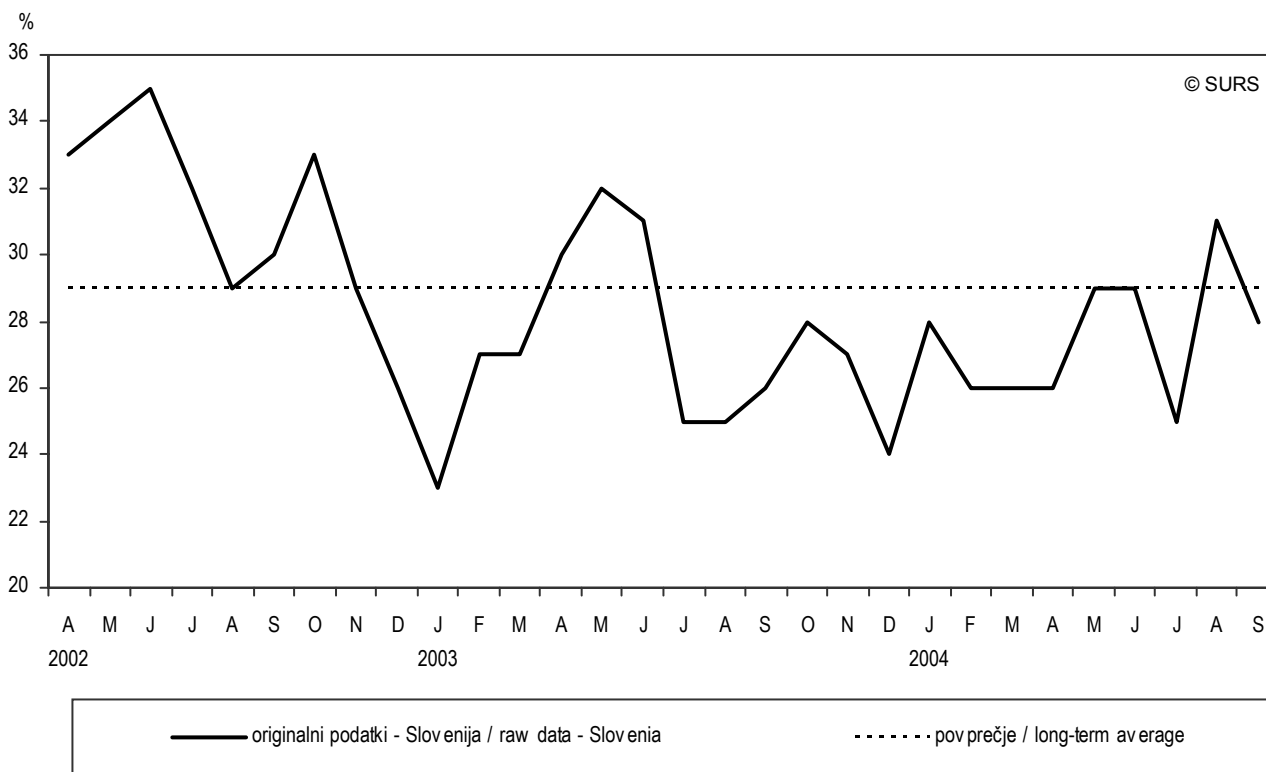
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, APRIL 2002 – SEPTEMBER 2004

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

- ▶ V septembru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 3 odstotne točke v primerjavi s preteklim mesecem. Glede na isti mesec lanskega leta je bil kazalec višji za 2 odstotni točki in za 1 odstotno točko višji od lanskega povprečja.
- ▶ Na gibanje kazalca zaupanja je vplivala predvsem ocena sedanjega povpraševanja.
- ▶ Večina kazalcev se je poslabšala. Izboljšal se je le kazalec pričakovanih cen, kazalec pričakovanega povpraševanja pa je ostal enak.
- ▶ In September 2004 the service confidence indicator fell by 3 percentage points compared to the previous month. The confidence indicator rose by 2 percentage points compared to September 2003 and by 1 percentage point compared to last year's average.
- ▶ The evolution of the confidence indicator was mostly influenced by the present demand.
- ▶ Most indicators deteriorated. Only the indicator of expected selling prices improved. The expected demand indicator remained unchanged.

1. KAZALEC ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 – SEPTEMBER 2004

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 – SEPTEMBER 2004



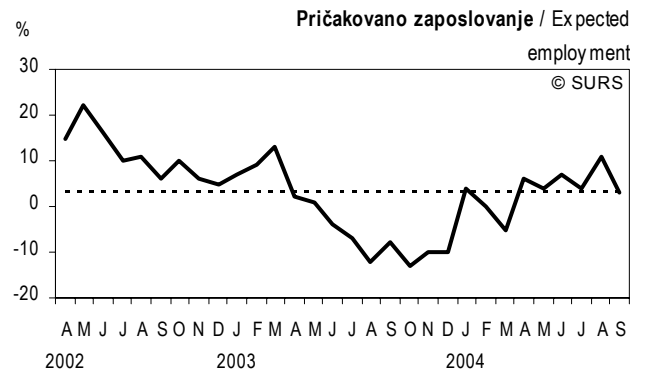
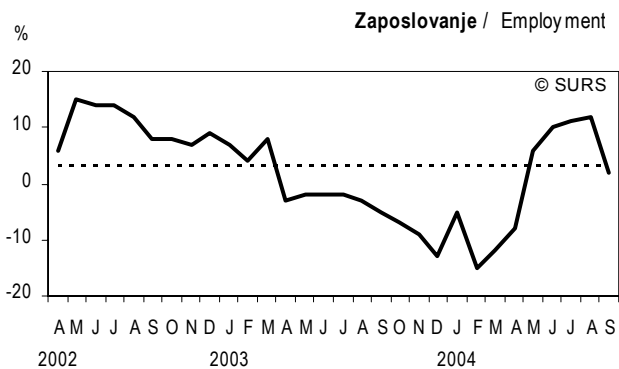
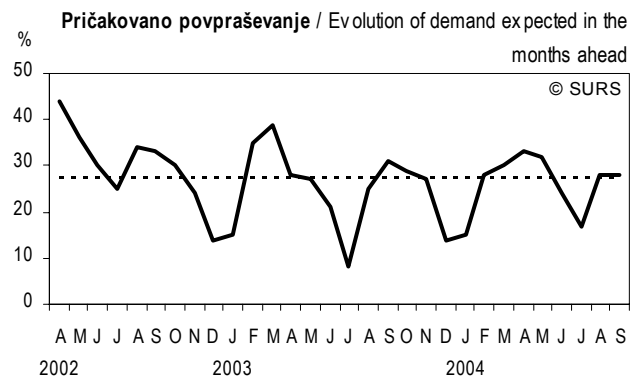
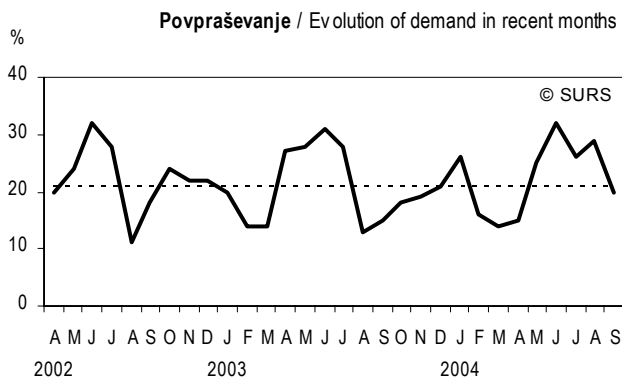
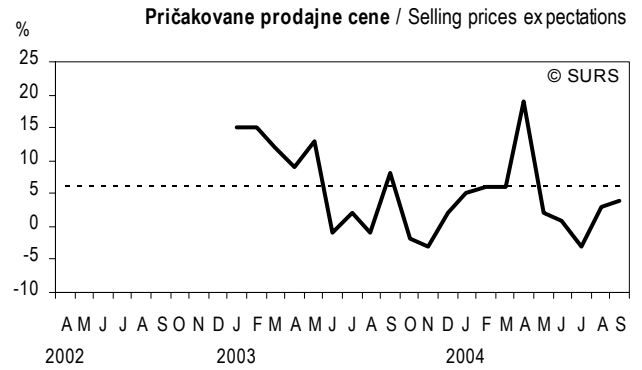
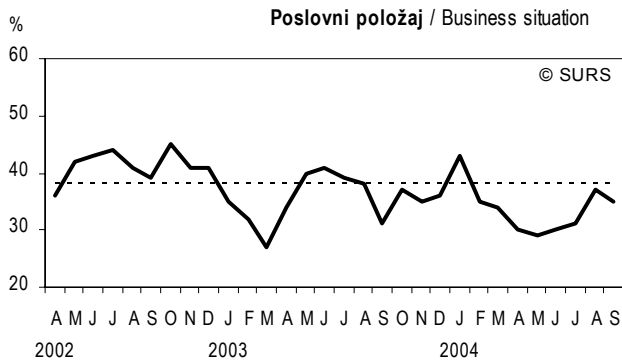
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

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

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

Ocena stanj / Appreciation of situation

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



— storitvene dejavnosti
services

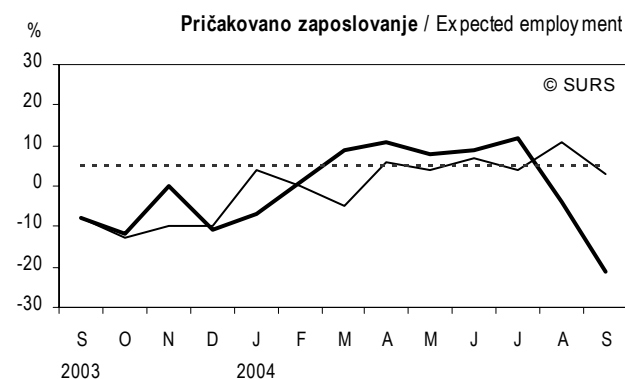
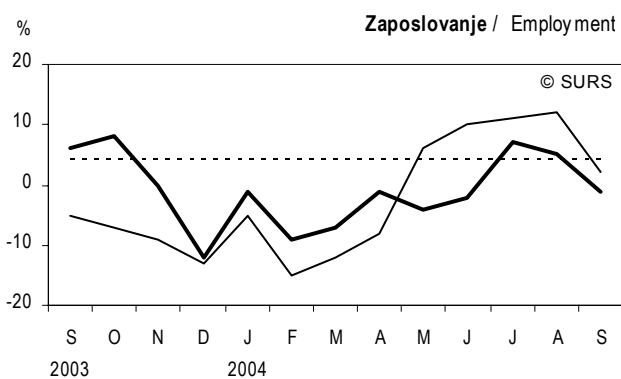
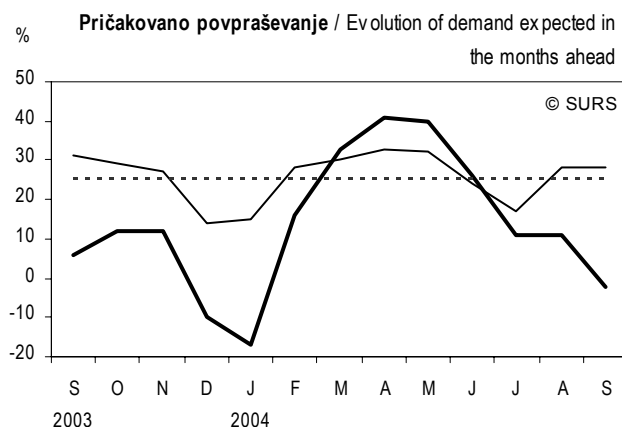
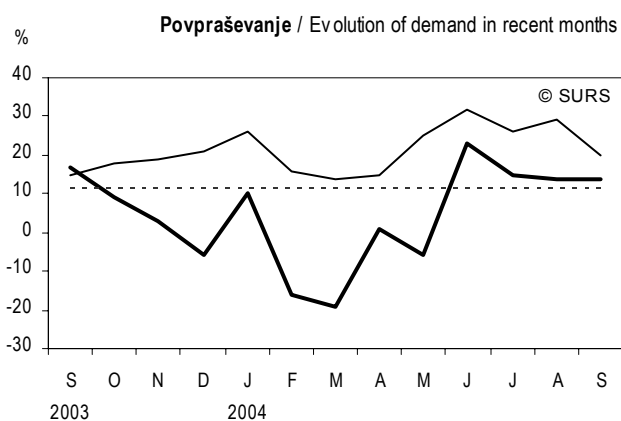
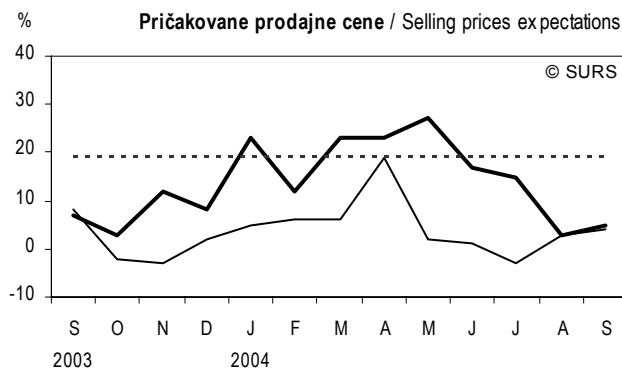
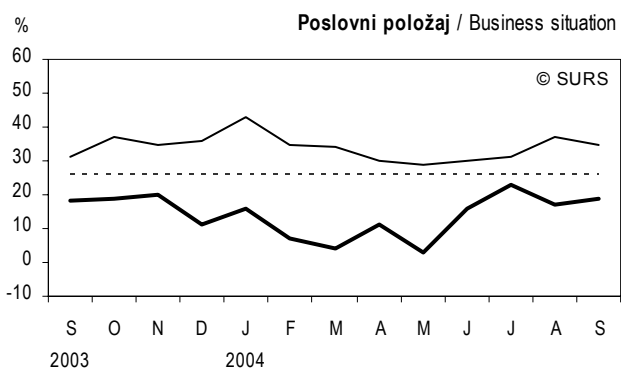
- - - povprečje
long-term average

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

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

Ocena stanj / Appreciation of situation

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



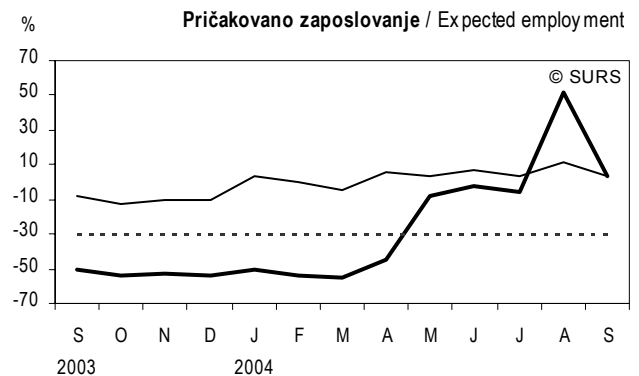
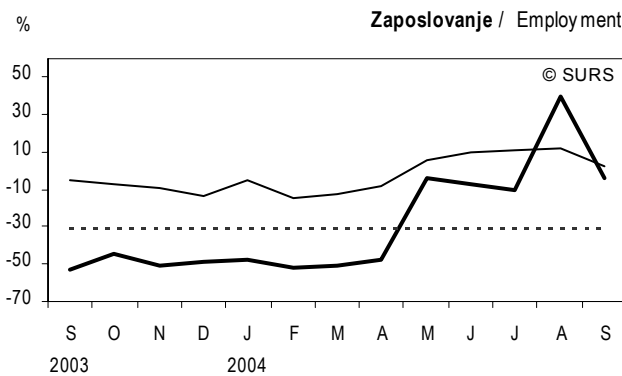
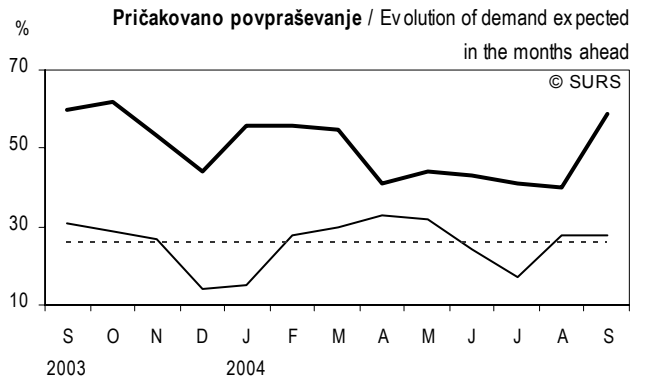
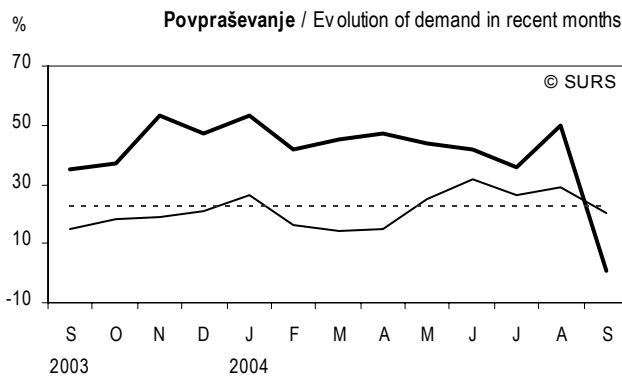
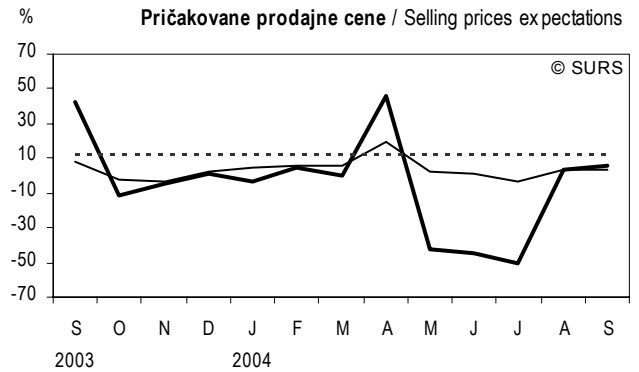
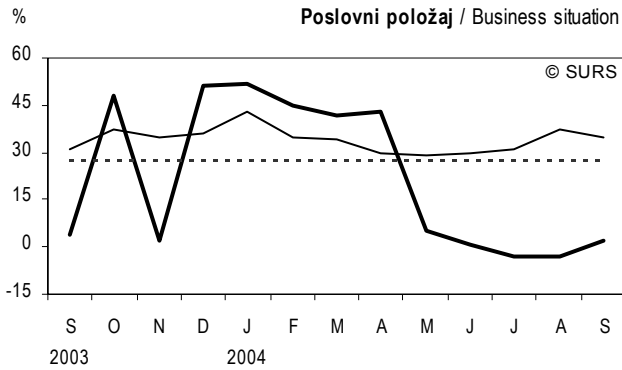
gostinstvo in s turizmom povezane dejavnosti hotels and restaurants, and tourist assistance activities	storitvene dejavnosti services	povprečje long-term average
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2.2 Gibanje ekonomskih kazalcev v kopenskem, vodnem in zračnem prometu, september 2003 - september 2004

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

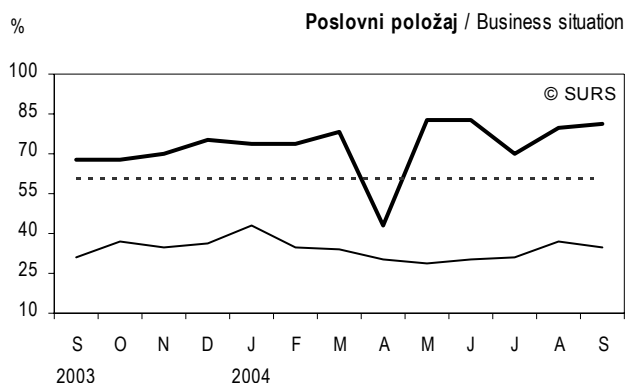
- - - - povprečje
long-term average



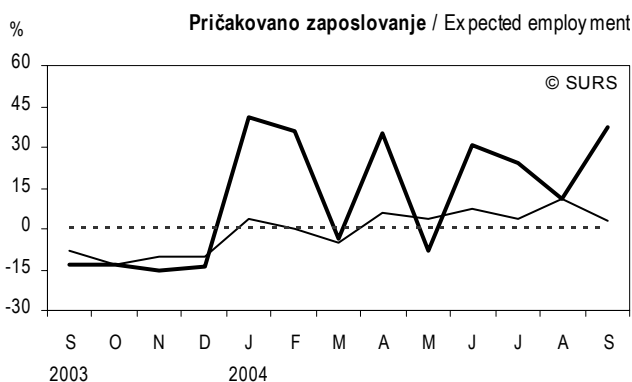
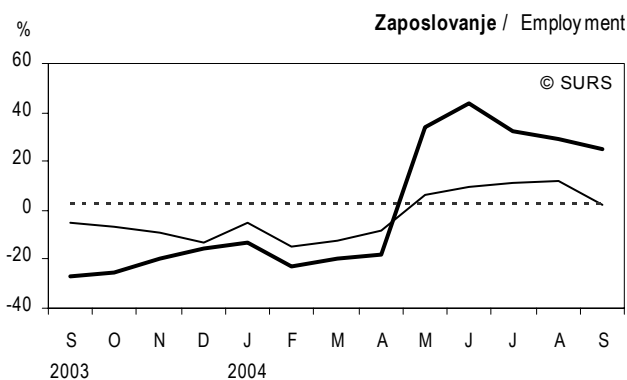
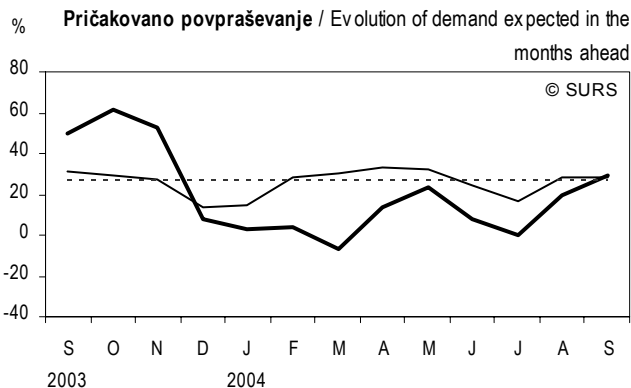
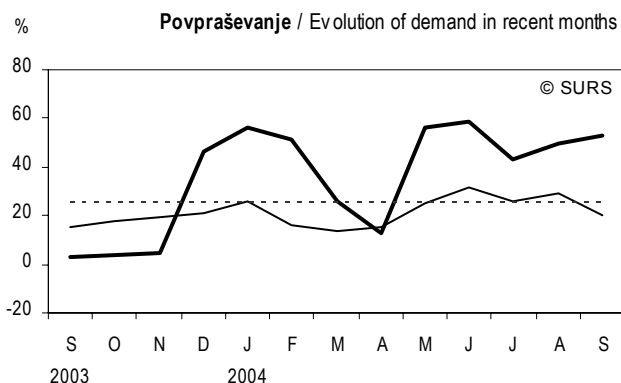
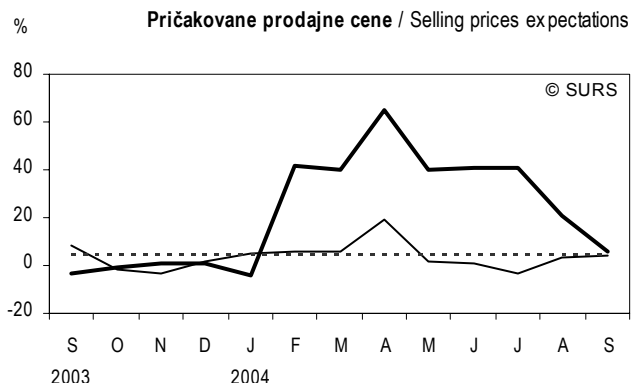
2.3 Gibanje ekonomskih kazalcev za dejavnost: pošte, telekomunikacij in obdelava podatkov, september 2003 - september 2004

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

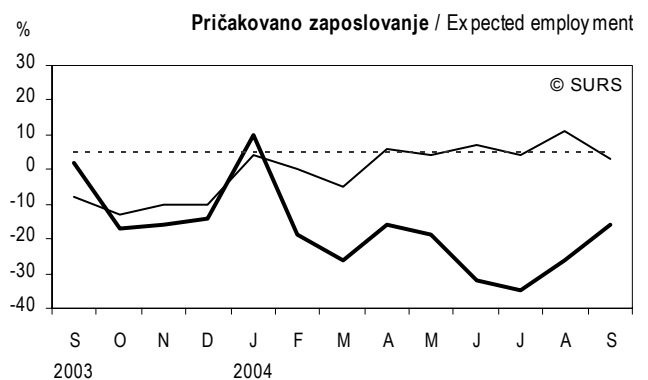
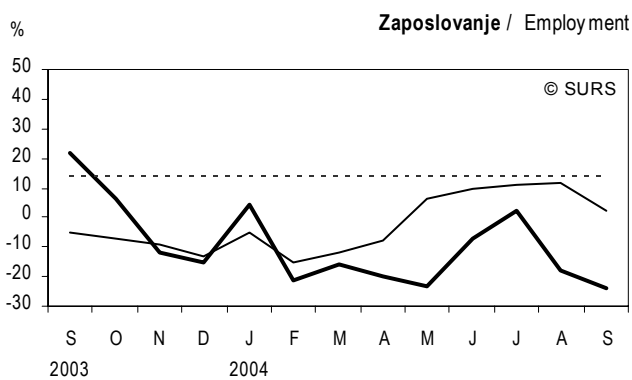
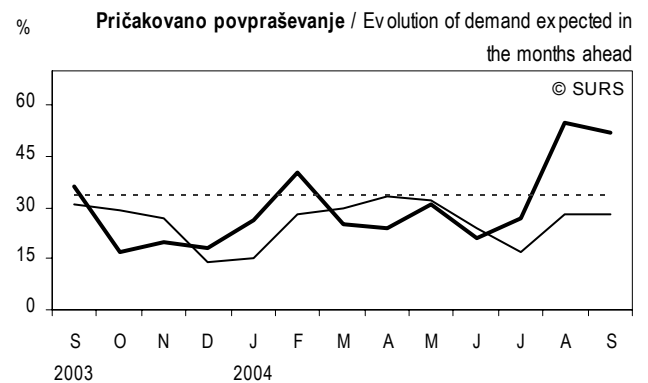
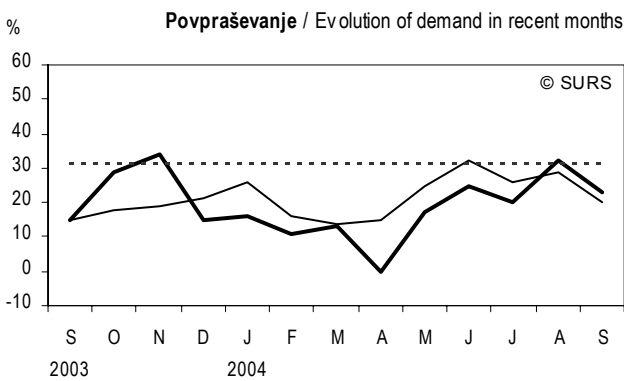
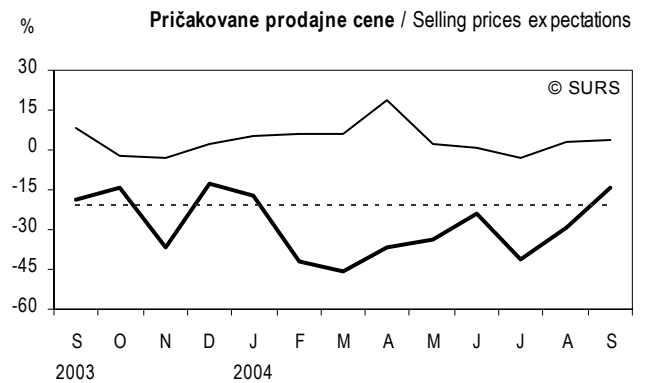
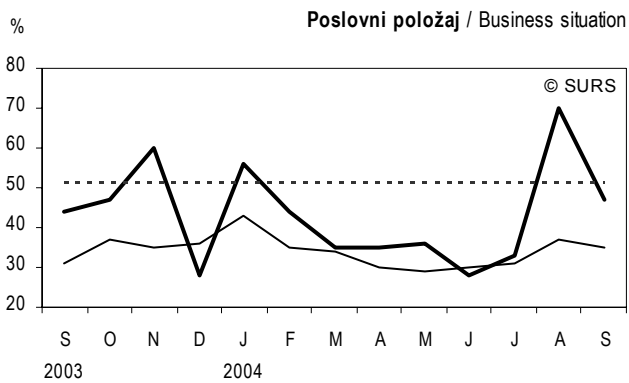
- - - povprečje
long-term average

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

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

Ocena stanj / Appreciation of situation

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

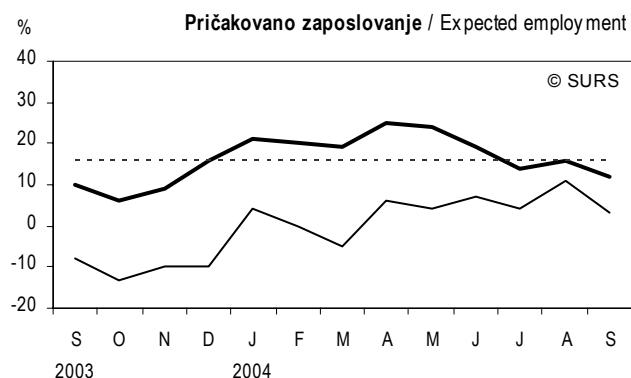
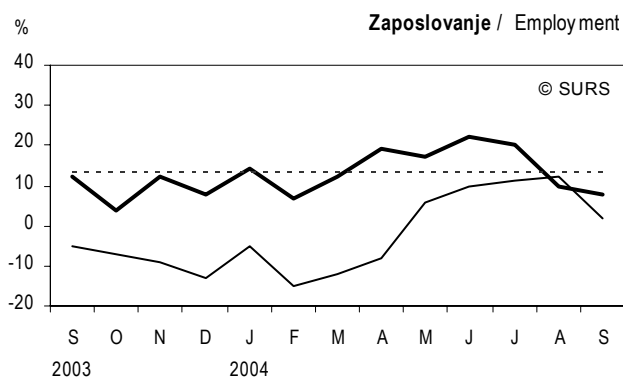
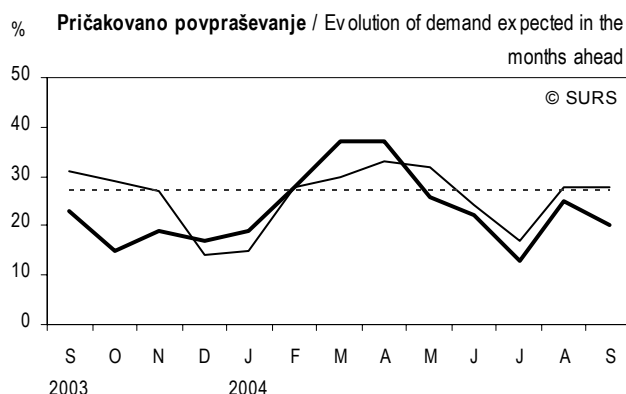
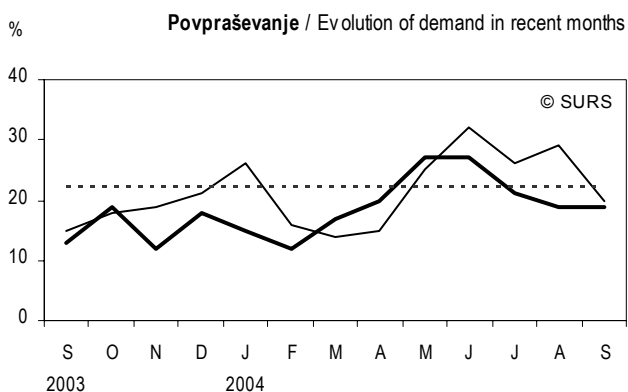
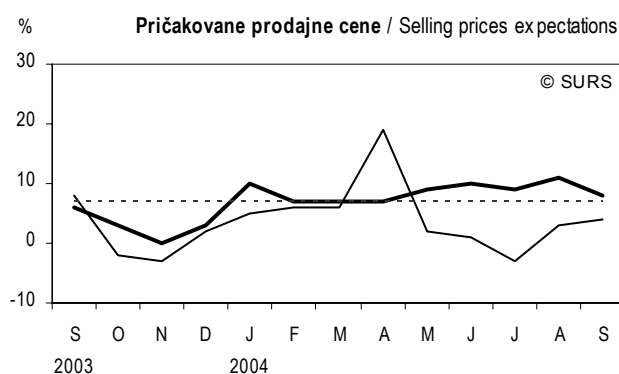
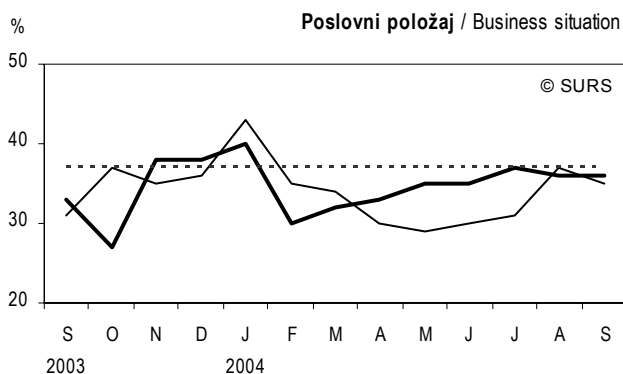


—	finančno posredništvo financial intermediation	—	storitvene dejavnosti services	- - - -	povprečje long-term average
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2.5 Gibanje ekonomskih kazalcev za dejavnost: poslovanje z nepremičninami, najem in poslovne storitve, september 2003 - september 2004
Evolution of economic indicators in real estate activities, renting and business services, September 2003 - September 2004

Ocena stanj / Appreciation of situation

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



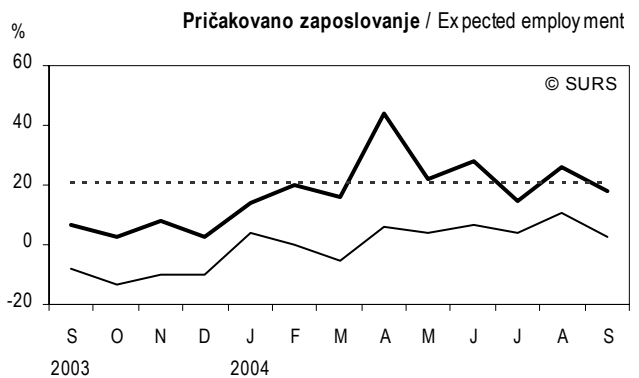
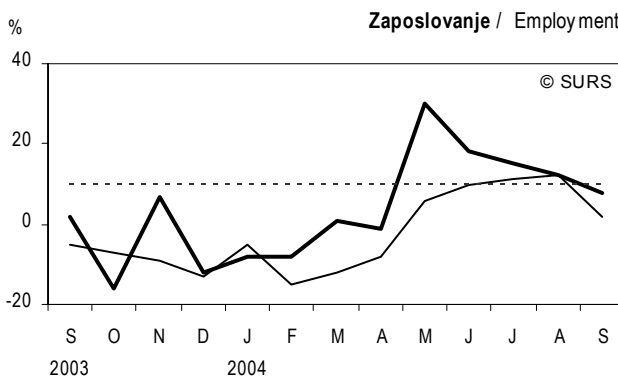
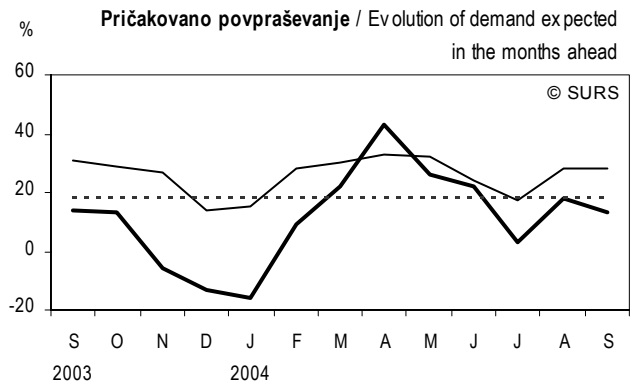
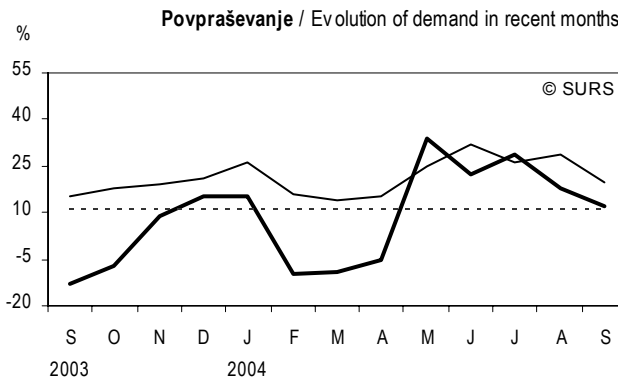
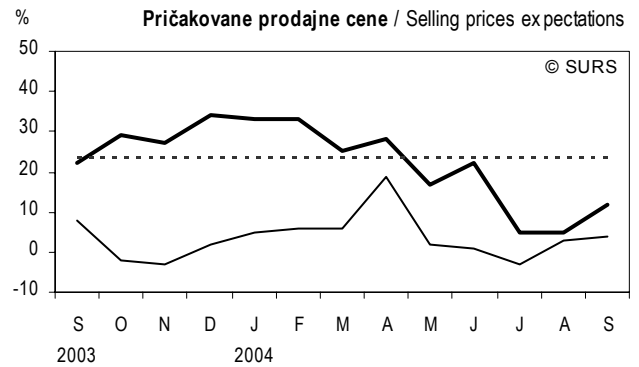
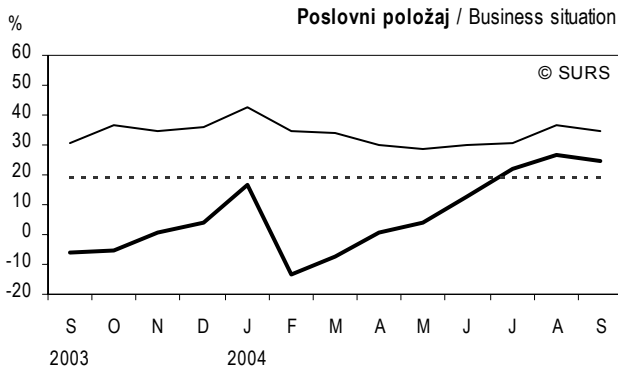
poslovanje z nepremičninami, najem in poslovne storitve real estate activities, renting and business services	storitvene dejavnosti services	povprečje long-term average
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2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, september 2003 - september 2004

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

Ocena stanj / Appreciation of situation

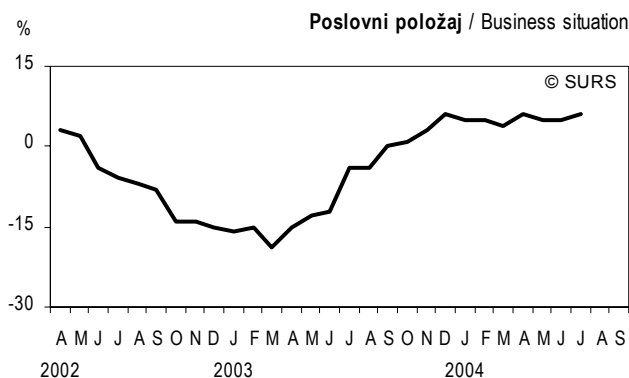
Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



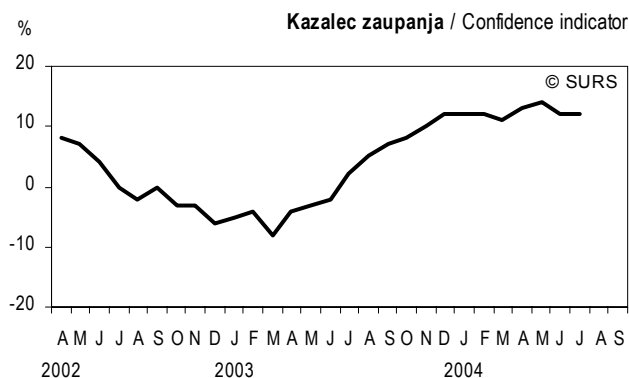
— dejavnost javne higiene in druge osebne storitvene dejavnosti sewage disposal and other service activities	— storitvene dejavnosti services	- - - dolgoletno povprečje long-term average
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3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU¹⁾, APRIL 2002 – SEPTEMBER 2004 EVOLUTION OF ECONOMIC INDICATORS IN SERVICE IN THE EU¹⁾, APRIL 2002 – SEPTEMBER 2004

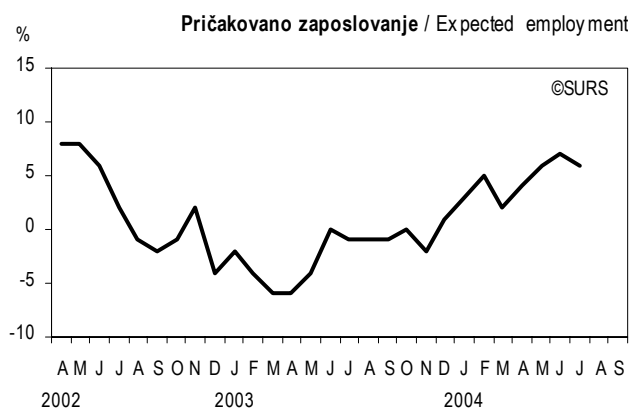
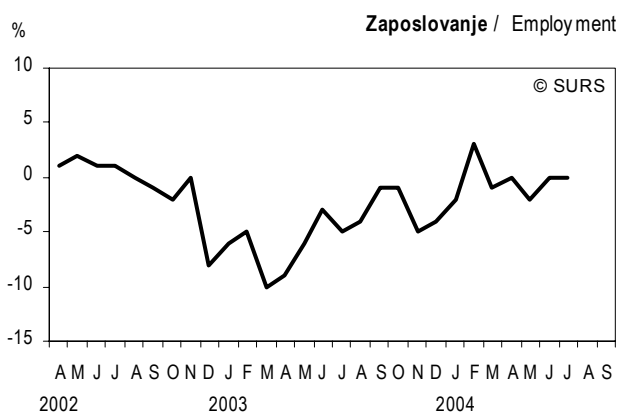
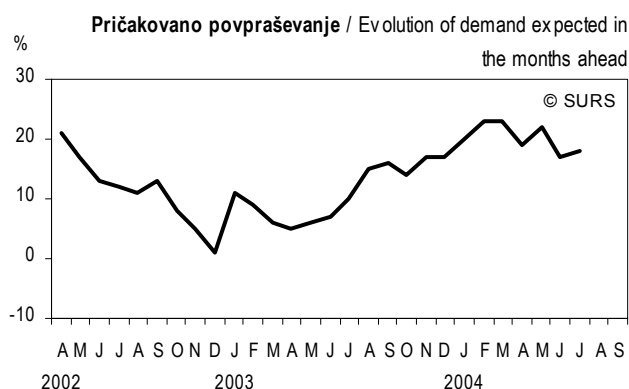
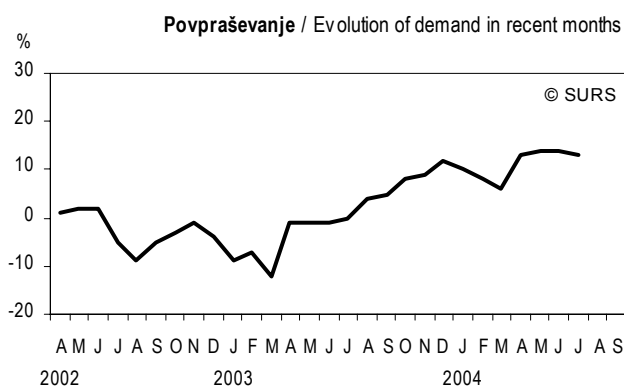
Ocena stanj / Appreciation of situation



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 zadnja dva meseca nam niso na voljo.
Data source for EU is the European Commission; data are seasonally adjusted. Data for the last two months 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 septembru 2004 je kazalec zaupanja v storitvenih dejavnostih padel za 3 odstotne točke v primerjavi s preteklim mesecem. Glede na isti mesec lanskega leta je bil kazalec višji za 2 odstotni točki in za 1 odstotno točko višji od lanskega povprečja.

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 September 2004 the service confidence indicator fell by 3 percentage points compared to the previous month. The confidence indicator rose by 2 percentage points compared to September 2003 and by 1 percentage point compared to last year's average.



Na gibanje kazalca zaupanja je vplivala predvsem ocena sedanjega povpraševanja.

Večina kazalcev se je poslabšala. Izboljšal se je le kazalec pričakovanih cen, kazalec pričakovanega povpraševanja pa je ostal enak.

POSLOVNI POLOŽAJ

V primerjavi s prejšnim mesecem se je poslovni položaj v zadnjih treh mesecih poslabšal, in sicer je bil kazalec za 2 odstotni točki nižji. Glede na isti mesec lanskega leta je bil kazalec višji za 4 odstotne točke ter ostal nespremenjen glede na lansko povprečje.

POVPRAŠEVANJE

V zadnjih 3 mesecih je bilo povpraševanje po storitvah nižje za 9 odstotnih točk. Glede na isti mesec lanskega leta je bil kazalec za 5 odstotnih točk višji in pod lanskim povprečjem za 1 odstotno točko. Po ocenah direktorjev bo povpraševanje v naslednjih treh mesecih ostalo enako. Glede na september 2003 je kazalec padel za 3 odstotne točke, v primerjavi z lanskim povprečjem pa je bil kazalec pričakovanega povpraševanja za 3 odstotne točke višji.

ZAPOSLOVANJE

V septembru so direktorji ocenili, da je zaposlovanje v zadnjih 3 mesecih izrazito padlo. Kazalec zaposlovanja je bil za 10 odstotnih točk nižji kot prejšnji mesec. Glede na isti mesec lanskega leta je kazalec zrasel za 7 odstotnih točk, v primerjavi z lanskim povprečjem pa je bila vrednost kazalca višja za 4 odstotne točke. Tudi kazalec pričakovanega zaposlovanja se je poslabšal, in sicer je bil za 8 odstotnih točk nižji glede na pretekli mesec. V primerjavi z istim mesecem lani se je pričakovano zaposlovanje povečalo za 11 odstotnih točk, glede na lansko povprečje pa za 6 odstotnih točk.

PRODAJNE CENE

Direktorji ocenjujejo, da se bodo prodajne cene v storitvenih dejavnostih nekoliko povišale, kajti glede na pretekli mesec je bil kazalec pričakovanih prodajnih cen za 1 odstotno točko višji. Glede na isti mesec lanskega leta je kazalec padel za 4 odstotne točke in za 2 odstotni točki zaostal za lanskim povprečjem.

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Sestavila / Prepared by: Darja Regoršek

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

Most indicators deteriorated. Only the indicator of expected selling prices improved. The expected demand indicator remained unchanged.

BUSINESS SITUATION

Compared to the previous month, the business situation in the past three months worsened as the indicator slightly fell by 2 percentage points. Compared to September 2003 it rose by 4 percentage points and compared to last year's average it remained the same.

DEMAND

In the past three months demand for services deteriorated by 9 percentage points. The indicator rose by 5 percentage points compared to September 2003 and it was below last year's average by 1 percentage point. Managers thought that in the next three months the demand would stay the same. The expected demand indicator declined by 3 percentage points compared to September 2003 while it was 3 percentage points higher than last year's average.

EMPLOYMENT

According to managers' estimates in September 2004, employment declined markedly in the past three months. The employment indicator was namely 10 percentage points lower than in the previous month. On the positive side, the indicator rose by 7 percentage points compared to September 2003 and it was 4 percentage points above last year's average. The expected employment indicator also worsened as it was 8 percentage points lower than in the previous month. Compared to September 2003 it rose by 11 percentage points and compared to last year's average by 6 percentage points.

SELLING PRICES

Managers estimated that selling prices would slightly rise in the next few months. The indicator was 1 percentage point higher than in the previous month. Compared to September 2003 it fell by 4 percentage points and it was 2 percentage points below last year's average.

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