



STATISTIČNE INFORMACIJE RAPID REPORTS

28. JANUAR 2005
28 JANUARY 2005

št./No 35

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

št./No 7

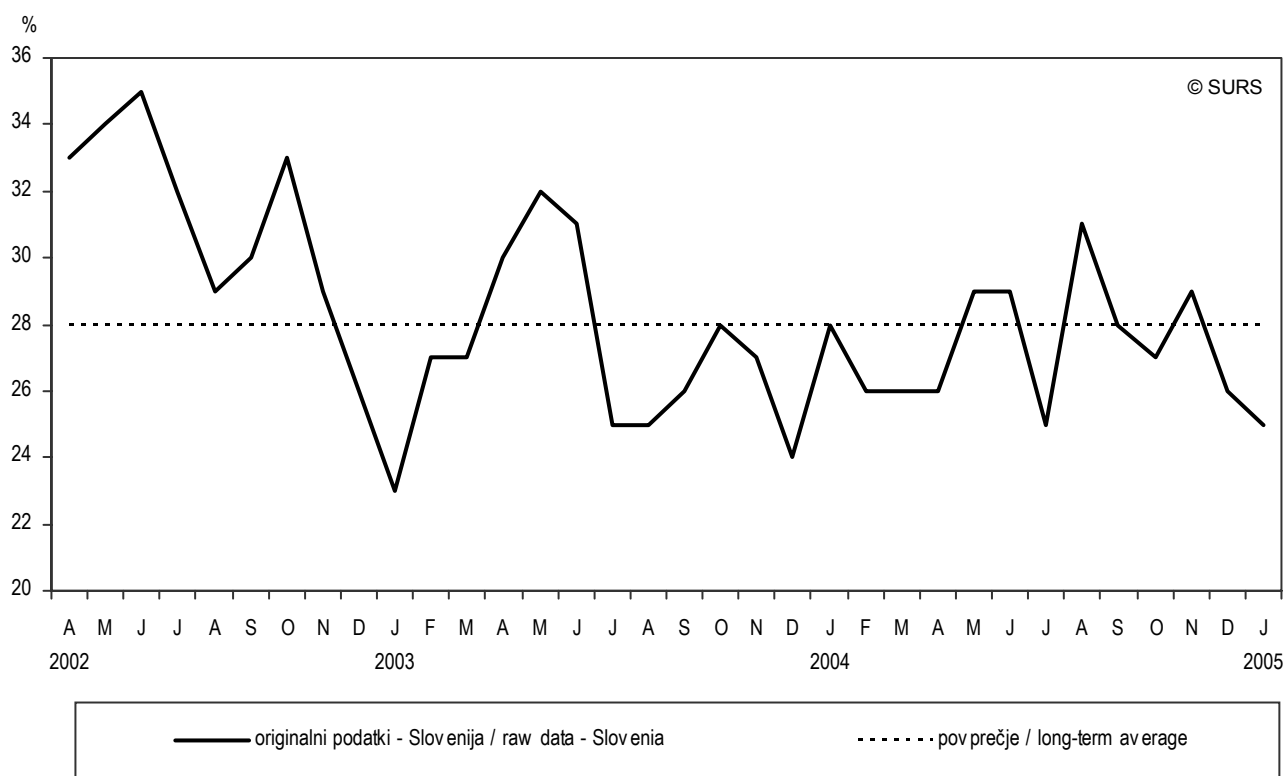
POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, JANUAR 2005

BUSINESS TENDENCY IN SERVICES, SLOVENIA, JANUARY 2005

- ▶ V januarju 2005 je vrednost kazalca zaupanja v storitvenih dejavnostih padla v vseh treh primerjavah. V primerjavi s preteklim mesecem je njegova vrednost padla za 1 odstotno točko, medtem ko je glede na isti mesec lanskega leta in glede na lansko povprečje vrednost padla za 3 odstotne točke.
- ▶ Na negativno gibanje kazalca zaupanja je vplivala predvsem ocena pričakovanega povpraševanja, kajti kazalca sedanji poslovni položaj in sedanje povpraševanje sta se izboljšala.
- ▶ Izmed kazalcev pričakovanj se je izboljšal le kazalec pričakovane prodajne cene. Medtem ko se je med kazalci stanj poslabšal le kazalec sedanjega zaposlovanja.
- ▶ In January 2005 the value of the service confidence indicator fell in all three comparisons. Compared to the previous month its value fell by 1 percentage point while compared to January 2004 and to last year's average it fell by 3 percentage points.
- ▶ The negative evolution of the confidence indicator was mainly driven by the expected demand, while the indicators of the present business situation and the present demand showed a positive development.
- ▶ Among expectations indicators only the expected selling prices indicator improved. While among situation indicators only the present employment indicator worsened.

1. KAZALEC ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 – JANUAR 2005

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 – JANUARY 2005



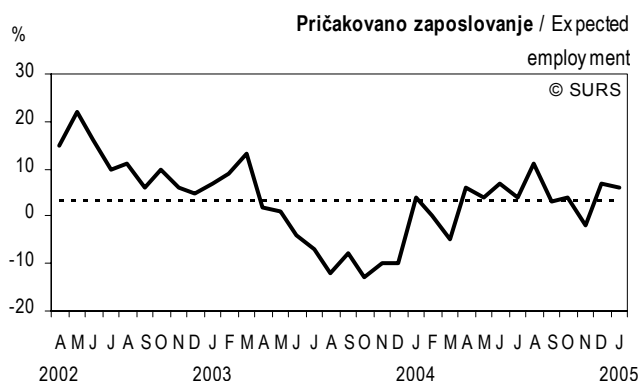
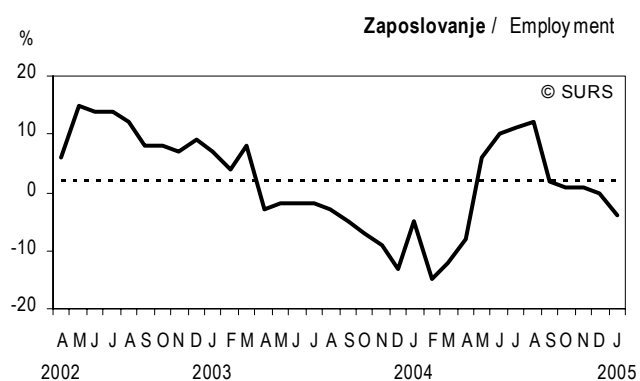
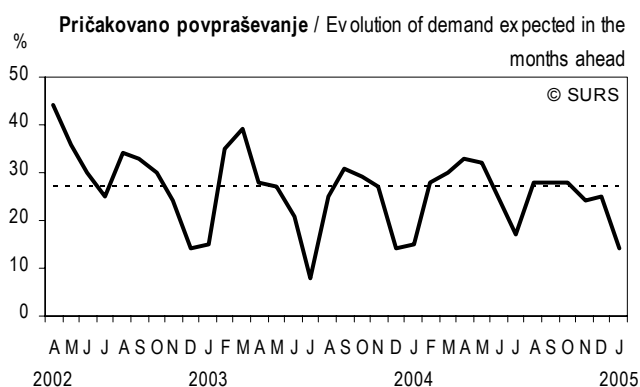
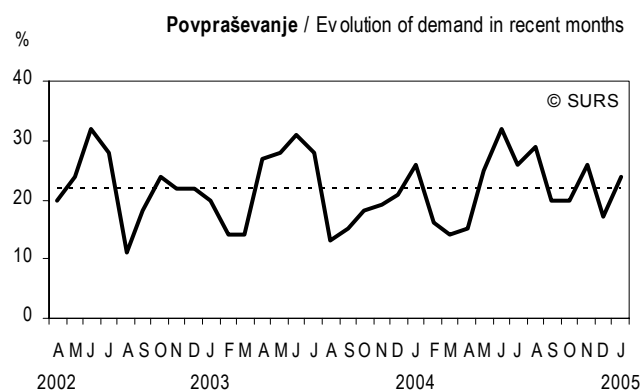
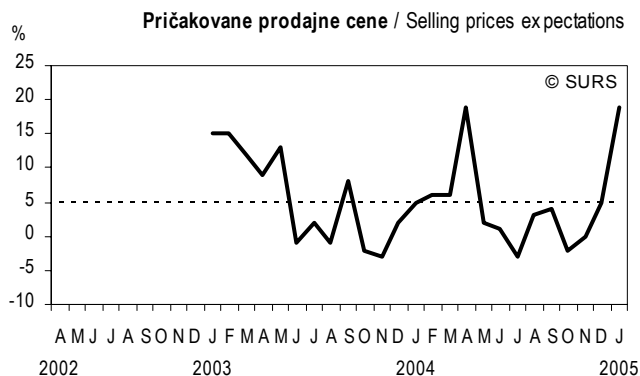
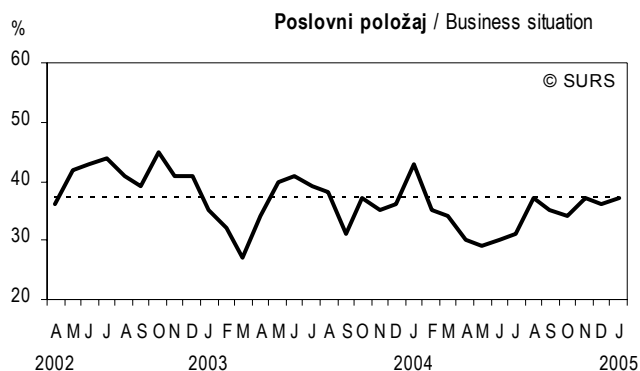
1) Kazalec zaupanja je povprečje ravnotežij na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

2. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V SLOVENIJI, APRIL 2002 – JANUAR 2005

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

Ocena stanj / Appreciation of situation

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



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

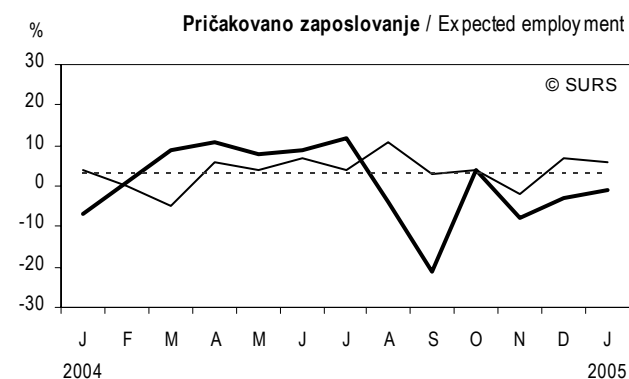
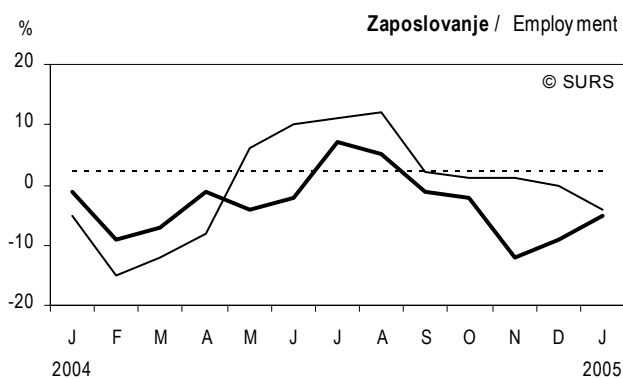
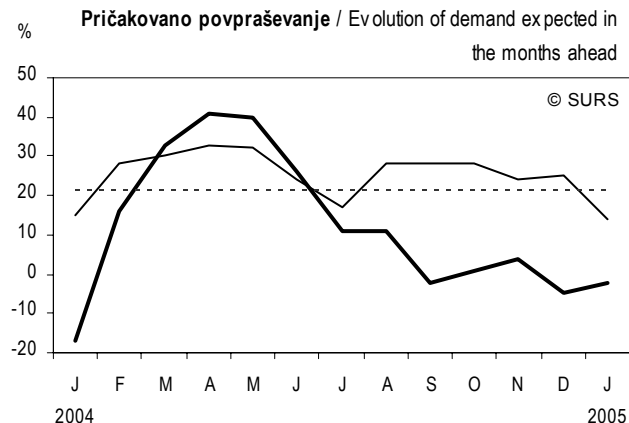
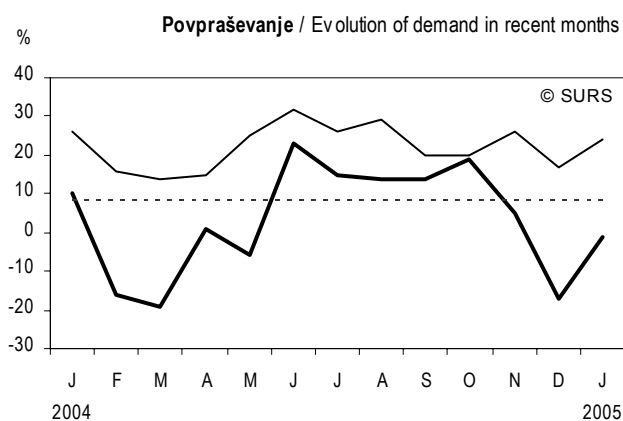
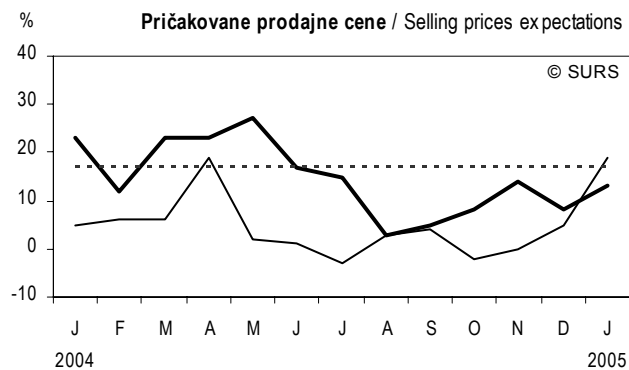
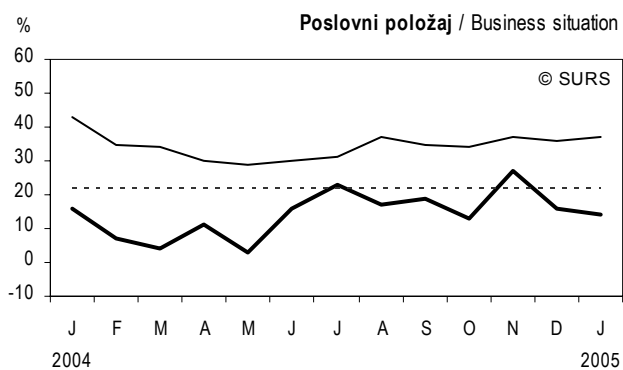


2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, januar 2004 - januar 2005

Evolution of economic indicators in hotels and restaurants and in tourist assistance activities, January 2004 - January 2005

Ocena stanj / Appreciation of situation

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



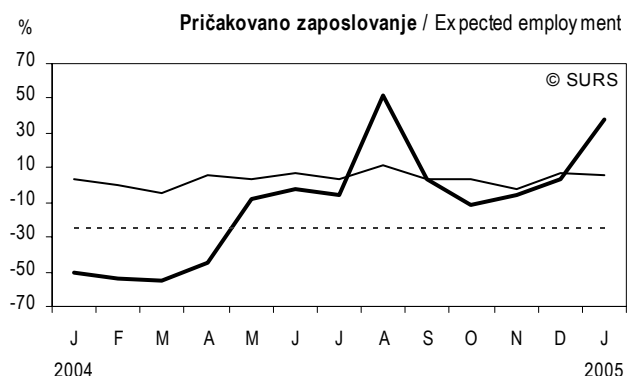
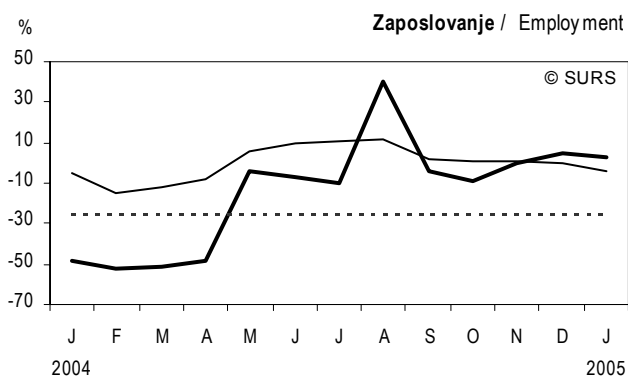
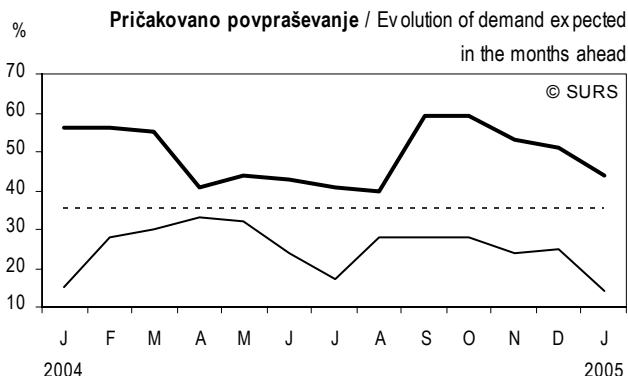
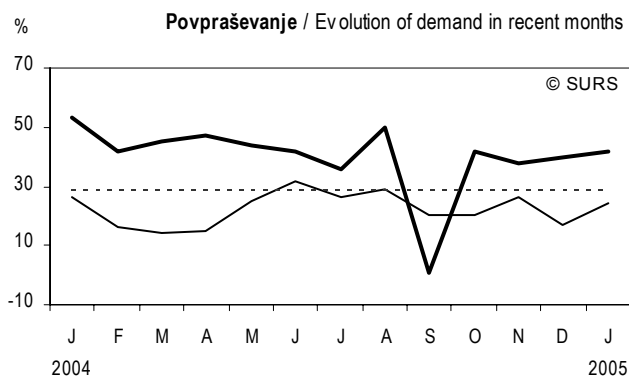
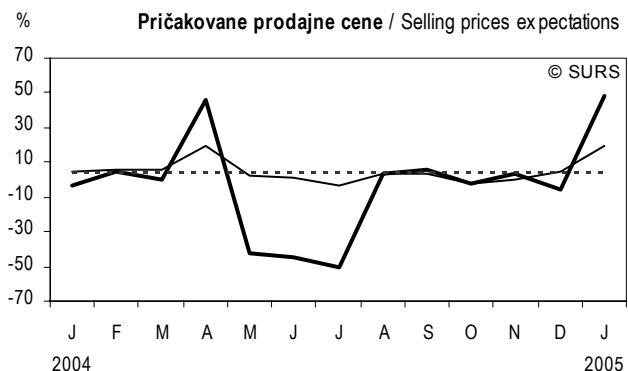
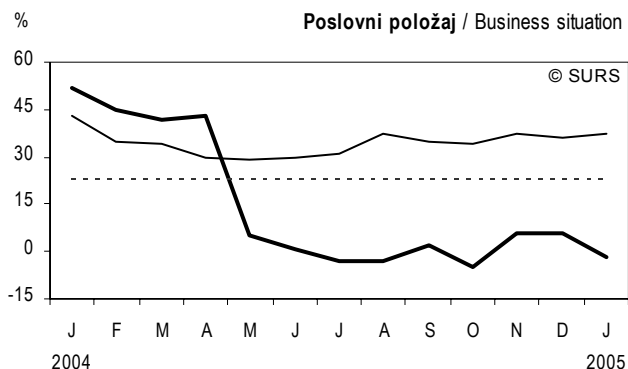
— gostinstvo in s turizmom povezane dejavnosti
hotels and restaurants, and tourist assistance activities

— storitvene dejavnosti
services

--- povprečje
long-term average

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

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

- - - povprečje
long-term average

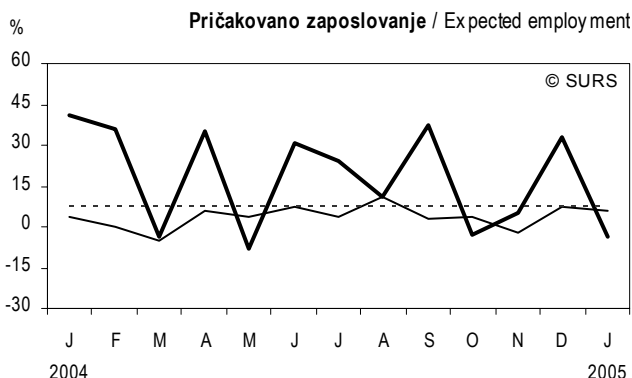
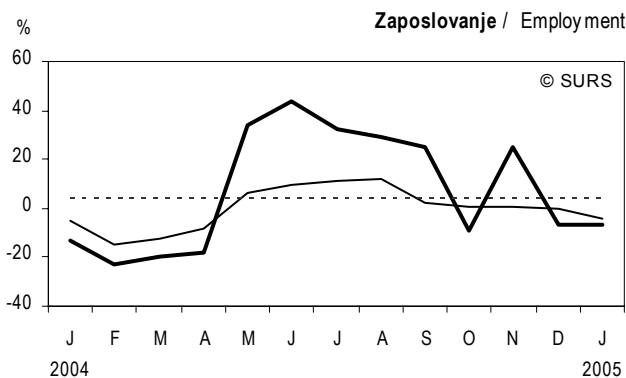
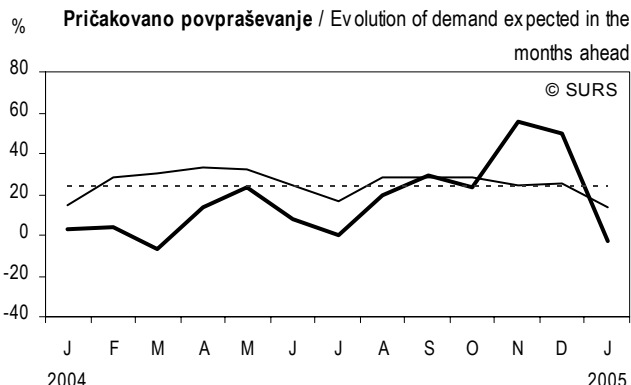
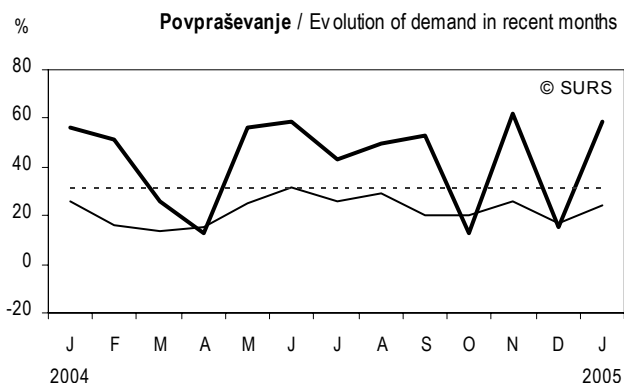
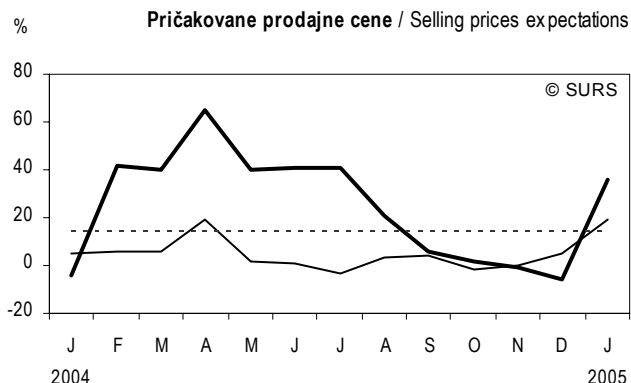
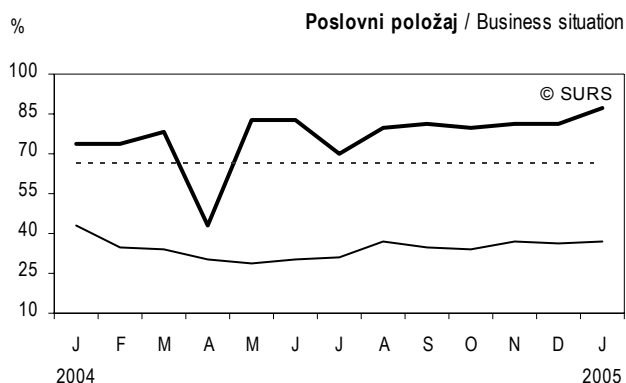


2.3 Gibanje ekonomskih kazalcev za dejavnost: pošte, telekomunikacij in obdelava podatkov, januar 2004 - januar 2005

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

Ocena stanj / Appreciation of situation

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



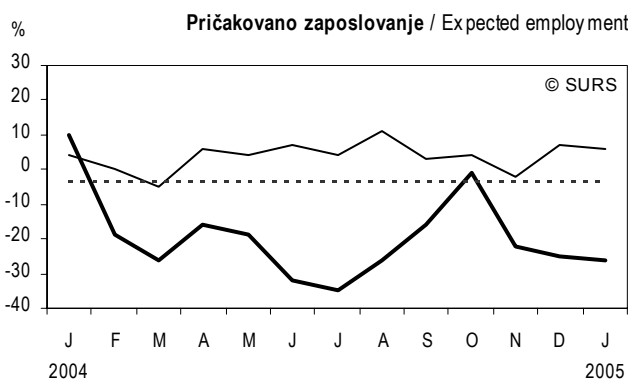
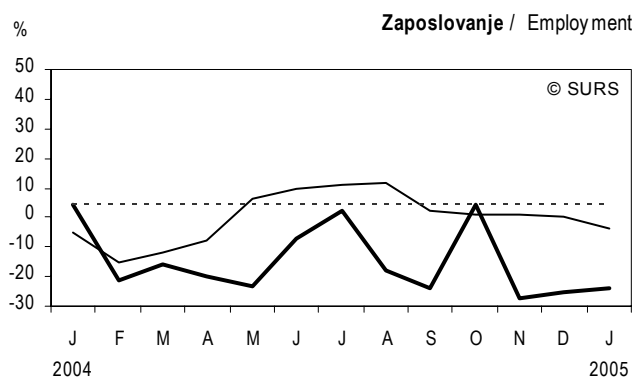
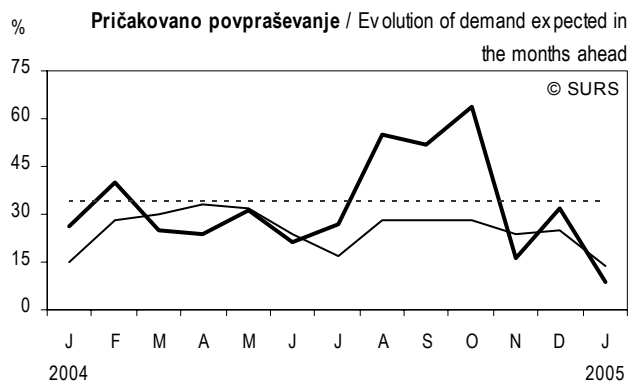
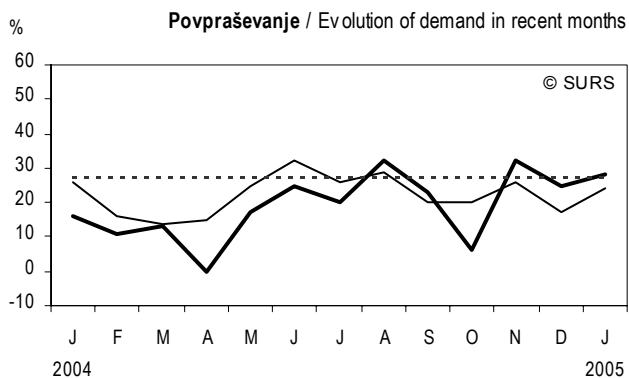
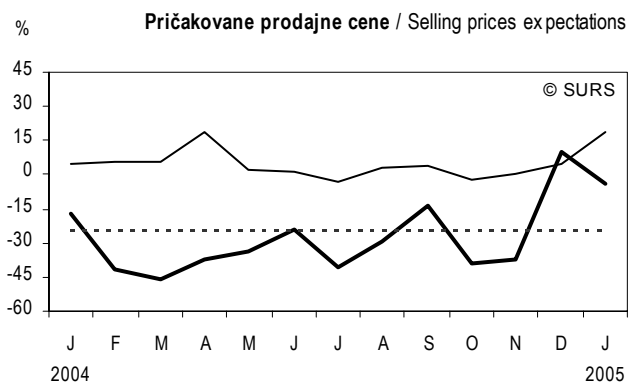
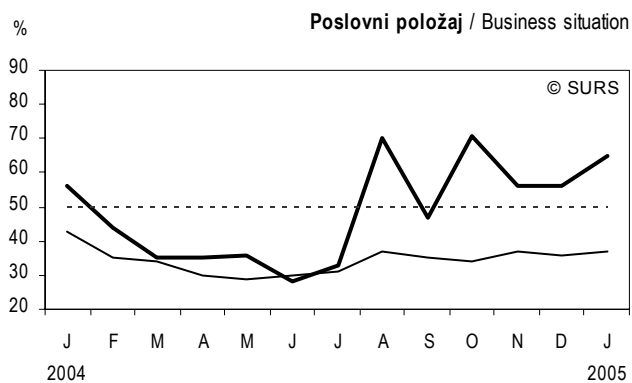
— pošta, telekomunikacije in obdelava podatkov
post and telecommunication, data processing

— storitvene dejavnosti
services

--- povprečje
long-term average

2.4 Gibanje ekonomskih kazalcev za dejavnost: finančno posredništvo, januar 2004 - januar 2005

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

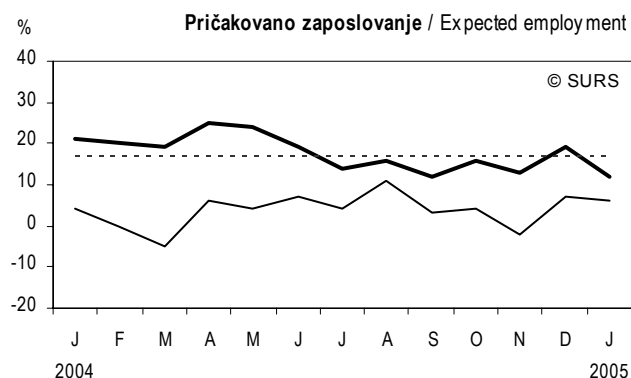
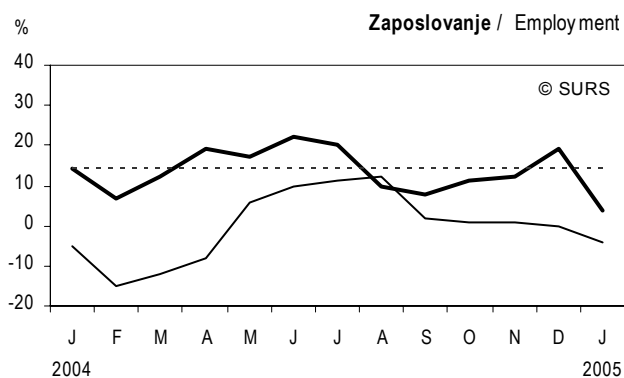
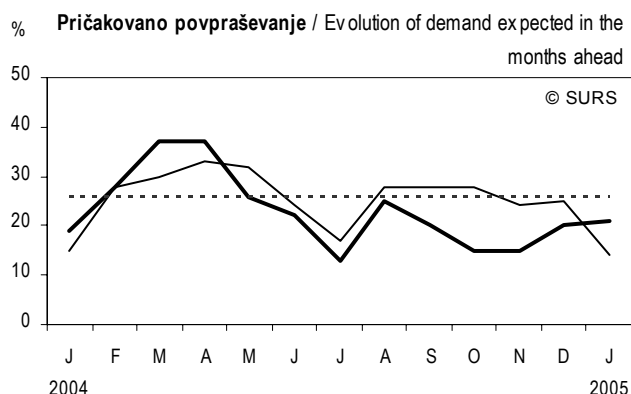
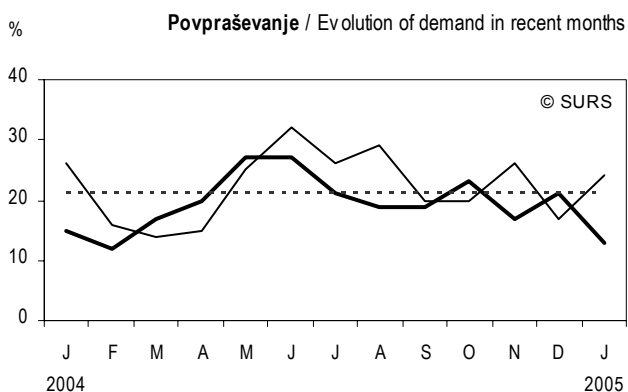
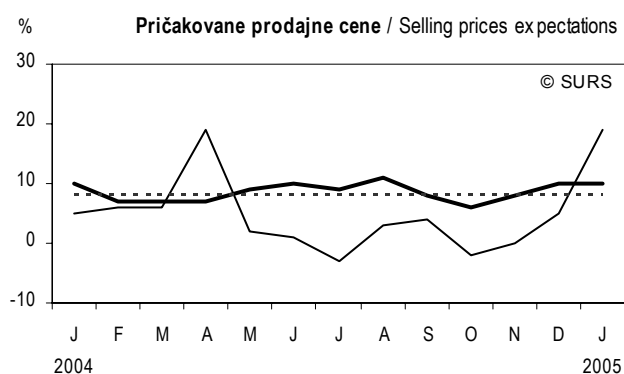
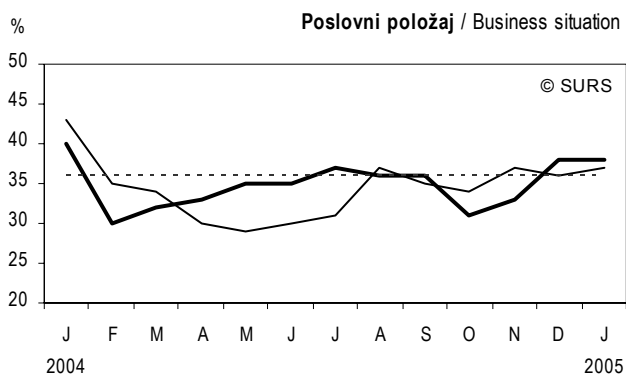
Ocena stanj / Appreciation of situation**Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months**— finančno posredništvo
financial intermediation— storitvene dejavnosti
services- - - povprečje
long-term average

2.5 Gibanje ekonomskih kazalcev za dejavnost: poslovanje z nepremičninami, najem in poslovne storitve, januar 2004 - januar 2005

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

Ocena stanj / Appreciation of situation

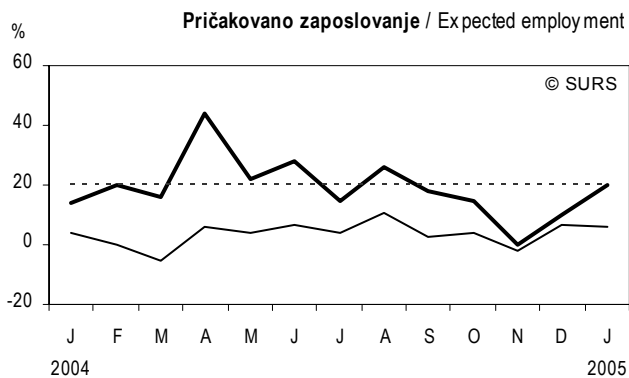
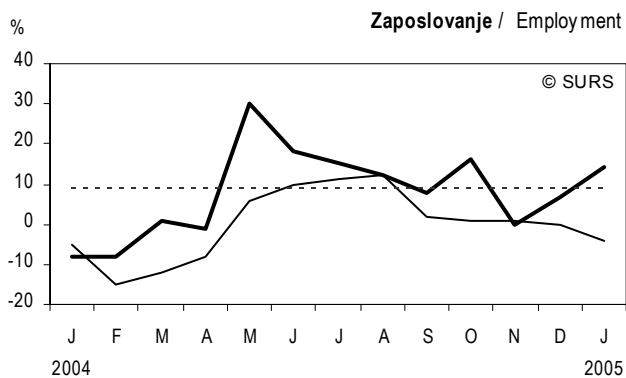
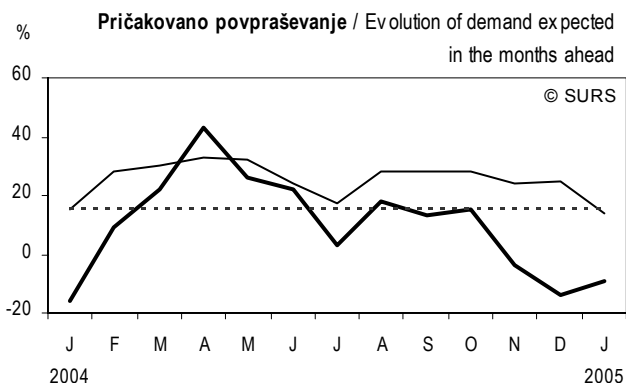
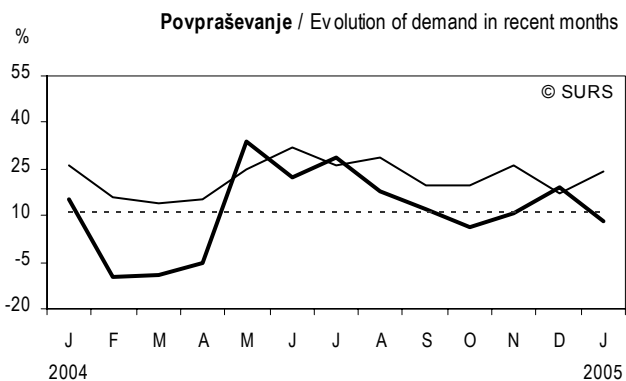
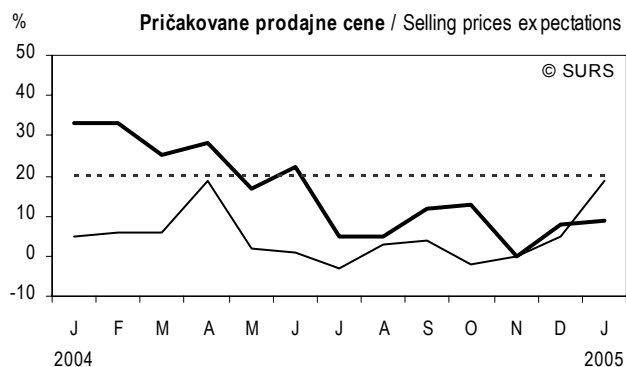
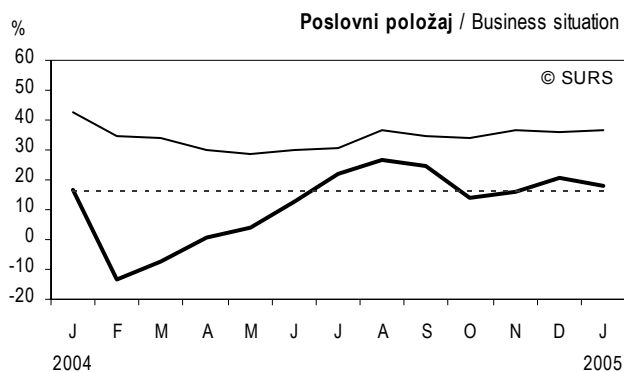
Pričakovanja v naslednjih 3 mesecih / Expectations in the next 3 months



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

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

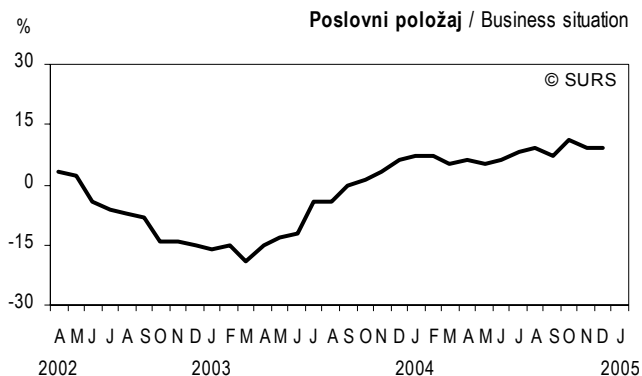
— storitvene dejavnosti
services

- - - - - dolgoletno povprečje
long-term average

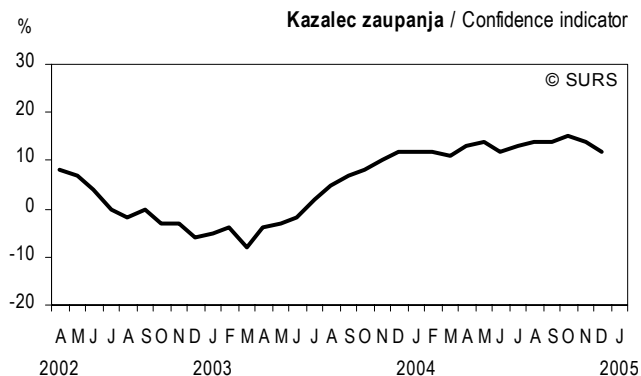


3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU¹⁾, APRIL 2002 – JANUAR 2005 EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN EU¹⁾, APRIL 2002 – JANUARY 2005

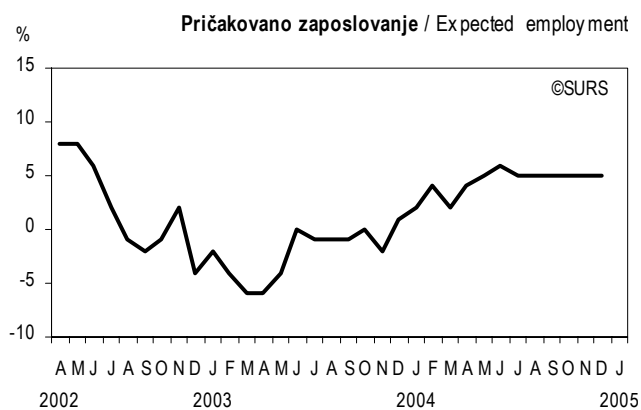
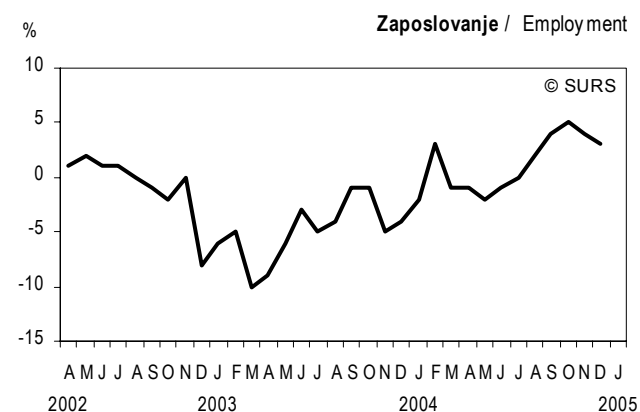
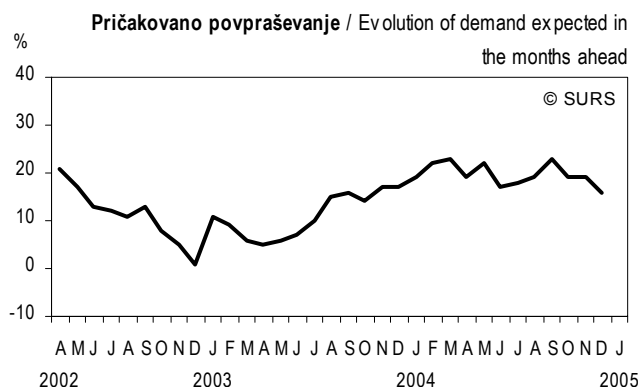
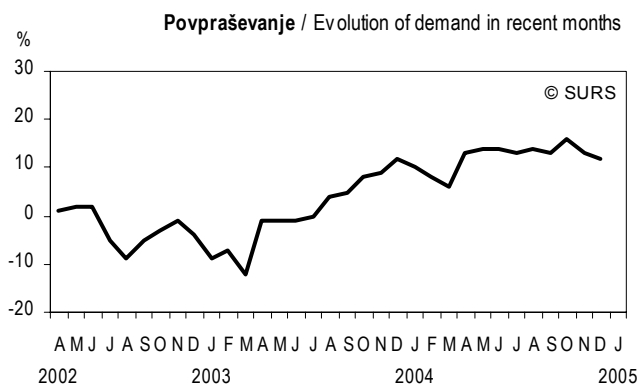
Ocena stanj / Appreciation of situation



Kazalec zaupanja / Confidence indicator



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



1) Vir podatkov za EU je Evropska komisija; 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. Grafiki 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 januarju 2005 je vrednost kazalca zaupanja v storitvenih dejavnostih padla v vseh treh primerjavah. V primerjavi s preteklim mesecem je njegova vrednost padla za 1 odstotno točko, medtem ko je glede na isti mesec lanskega leta in glede na lansko povprečje vrednost padla za 3 odstotne točke.

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 January 2005 the value of the service confidence indicator fell in all three comparisons. Compared to the previous month its value fell by 1 percentage point while compared to January 2004 and to last year's average it fell by 3 percentage points.

Na negativno gibanje kazalca zaupanja je vplivala predvsem ocena pričakovanega povpraševanja, kajti kazalca sedanjí poslovni položaj in sedanje povpraševanje sta se izboljšala.

Izmed kazalcev pričakovanj se je izboljšal le kazalec pričakovane prodajne cene. Medtem ko se je med kazalci stanj poslabšal le kazalec sedanjega zaposlovanja.

POSLOVNI POLOŽAJ

V primerjavi s prejšnjim mesecem se je poslovni položaj v zadnjih treh mesecih malo izboljšal, saj je bil kazalec višji za 1 odstotno točko. Glede na isti mesec lanskega leta je kazalec padel za 6 odstotnih točk, medtem ko se je njegova vrednost glede na lansko povprečje dvignila za 3 odstotne točke.

POVPRAŠEVANJE

V zadnjih 3 mesecih se je povpraševanje po storitvah izboljšalo. Glede na pretekli mesec se je kazalec zvišal za 7 odstotnih točk. Glede na isti mesec lanskega leta se je kazalec znižal za 2 odstotni točki, hkrati pa je bil za 2 odstotni točki nad lanskim povprečjem. Po drugi strani pa so bili direktorji zelo pesimistični glede gibanja povpraševanja v naslednjih treh mesecih. Glede na december 2004 je bil kazalec pričakovanega povpraševanja nižji za 11 odstotnih točk, glede na januar 2004 za 1 odstotno točko in glede na lansko povprečje za 12 odstotnih točk.

ZAPOSLOVANJE

V januarju 2005 so direktorji ocenili, da se je zaposlovanje v zadnjih 3 mesecih znižalo. Kazalec zaposlovanja je bil namreč za 4 odstotne točke nižji kot prejšnji mesec. Glede na isti mesec lanskega leta se je kazalec malo izboljšal (za 1 odstotno točko), vendar pa je bil za 4 odstotne točke pod lanskim povprečjem. Kazalec pričakovanega zaposlovanja je padel za 1 odstotno točko glede na pretekli mesec. V primerjavi s istim mesecem lani in z lanskim povprečjem se je kazalec pričakovanega zaposlovanja dvignil za 2 odstotni točki.

PRODAJNE CENE

Direktorji ocenjujejo, da se bodo v naslednjih treh mesecih prodajne cene v storitvenih dejavnostih zelo zvišale. Kazalec pričakovanih prodajnih cen je bil glede na pretekli mesec in glede na januar 2004 višji za 14 odstotnih točk. Glede na lansko povprečje pa je bil višji za 15 odstotnih točk.

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The negative evolution of the confidence indicator was mainly driven by the expected demand, while the indicators of the present business situation and the present demand showed a positive development.

Among expectations indicators only the expected selling prices indicator improved. While among situation indicators only the present employment indicator worsened.

BUSINESS SITUATION

Compared to the previous month the business situation in the past three months slightly improved as this indicator rose by 1 percentage point. Compared to January 2004 the indicator fell by 6 percentage points while compared to last year's average its value rose by 3 percentage points.

DEMAND

In the past three months demand for services improved. Compared to the previous month the demand indicator increased by 7 percentage points. Compared to January 2004 it deteriorated by 2 percentage points but it was 2 percentage points above last year's average. On the other hand, managers were very pessimistic about the demand in the next three months. Compared to December 2004 the expected demand indicator dropped by 11 percentage points, compared to January 2004 by 1 percentage point and compared to last year's average by 12 percentage points.

EMPLOYMENT

According to managers' estimates in January 2005, employment decreased in the past three months. The employment indicator was namely 4 percentage points lower than in the previous month. The indicator showed a slight improvement compared to January 2004 (by 1 percentage point) but it was 4 percentage points below last year's average. The expected employment indicator fell by 1 percentage point in comparison with the previous month. Compared to January 2004 and to last year's average it rose by 2 percentage points.

SELLING PRICES

Managers estimated that selling prices would sharply rise in the next few months. The indicator of the expected selling prices was 14 percentage points higher than in the previous month and than in January 2004. Compared to last year's average it was up by 15 percentage points.

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