



STATISTIČNE INFORMACIJE RAPID REPORTS

2. SEPTEMBER 2005
2 SEPTEMBER 2005

št./No 241

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

št./No 41

POSLOVNE TENDENCE V STORITVENIH DEJAVNOSTIH, SLOVENIJA, AVGUST 2005

BUSINESS TENDENCY IN SERVICES, SLOVENIA, AUGUST 2005

- ▶ V avgustu 2005 se je vrednost kazalca zaupanja v storitvenih dejavnostih v primerjavi s stanjem v preteklem mesecu dvignila za 1 odstotno točko. V primerjavi z avgustom 2004 in v primerjavi z lanskim povprečjem pa se je njegova vrednost zmanjšala, in sicer za 9 oz. za 6 odstotnih točk.
- ▶ Kazalec zaupanja v storitvenih dejavnostih se je dvignil predvsem zaradi ocen o izboljšanju *pričakovanega povpraševanja*, čeprav sta bila *sedanji poslovni položaj* in *sedanje povpraševanje* ocenjena slabše.
- ▶ Kazalci stanj so se večinoma poslabšali, le kazalec sedanje zaposlovanje je ostal enak. Kazalci pričakovanj pa so se večinoma izboljšali, poslabšal se je le kazalec pričakovano zaposlovanje.
- ▶ In August 2005 a slight rise of the service confidence indicator was registered in comparison with the previous month, namely by 1 percentage point. Compared to August 2004 the service confidence indicator fell by 9 percentage points and compared to last year's average by 6 percentage points.
- ▶ The rise of the service confidence indicator was mostly driven by an improvement in the assessment of the *expected demand*, while the assessment of the *present business situation* and *present demand* worsened.
- ▶ Most situation indicators worsened, except the present employment indicator which remained the same. On the other hand, most expectation indicators improved, only the expected employment indicator worsened.

1. KAZALEC ZAUPANJA¹⁾ V SLOVENIJI, APRIL 2002 - AVGUST 2005

CONFIDENCE INDICATOR¹⁾ IN SLOVENIA, APRIL 2002 - AUGUST 2005



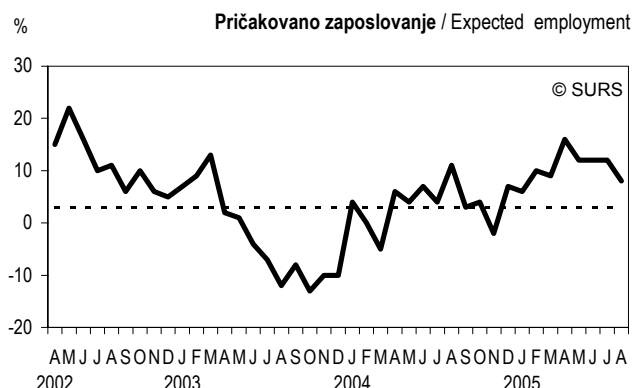
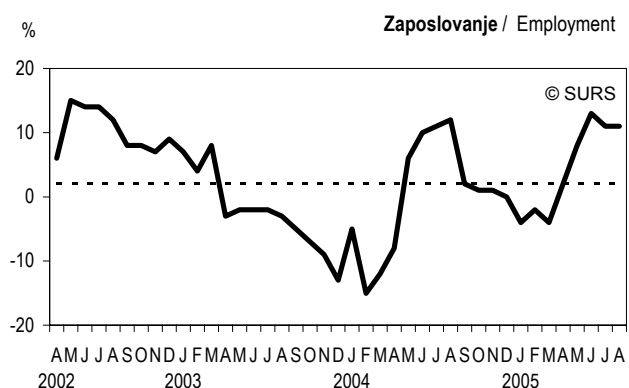
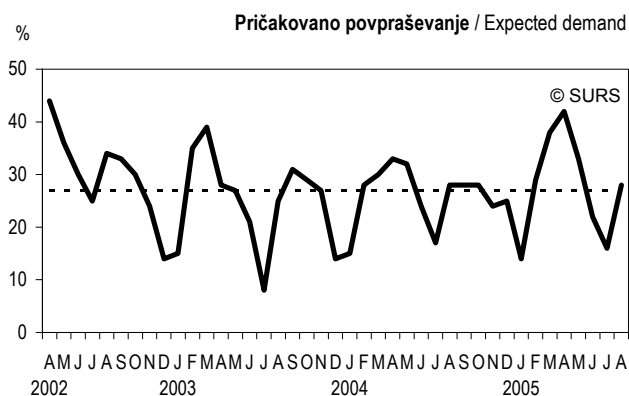
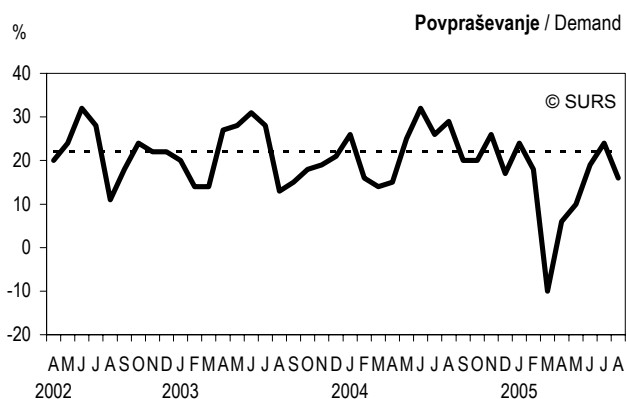
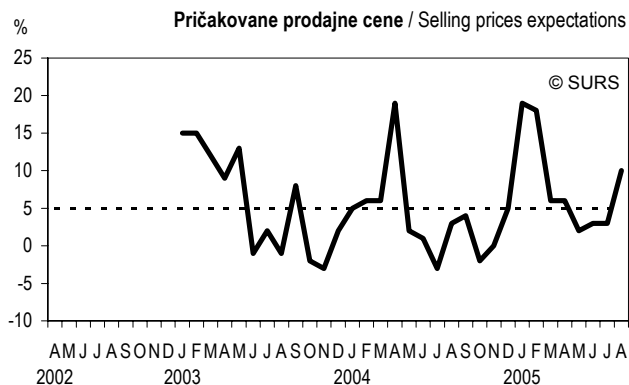
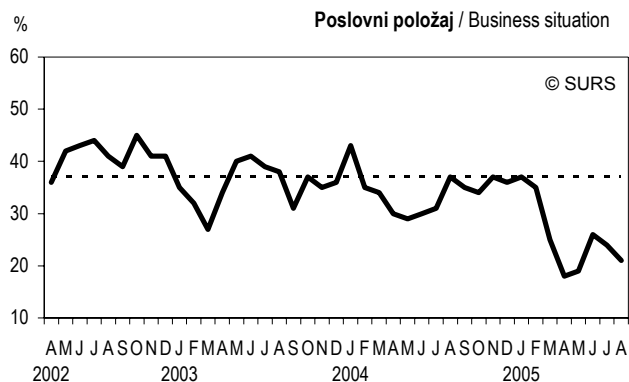
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanja o poslovnem položaju ter sedanjem in pričakovanem povpraševanju.
The confidence indicator is an average of responses (balances) to questions on business situation and present and expected demand.

2. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V SLOVENIJI, APRIL 2002 - AVGUST 2005

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

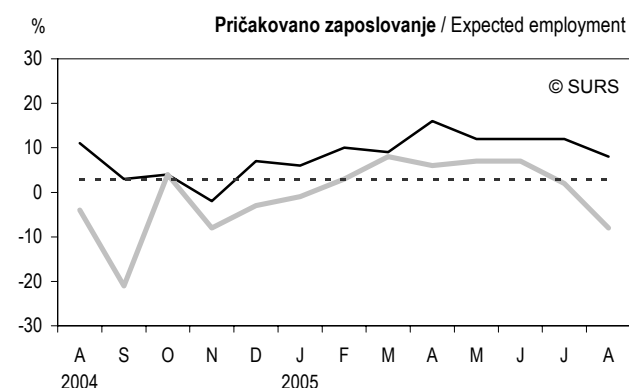
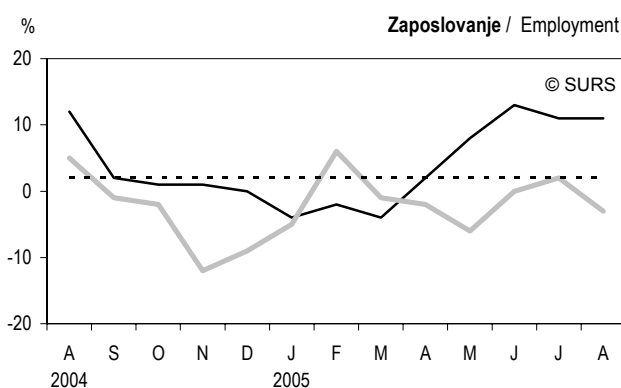
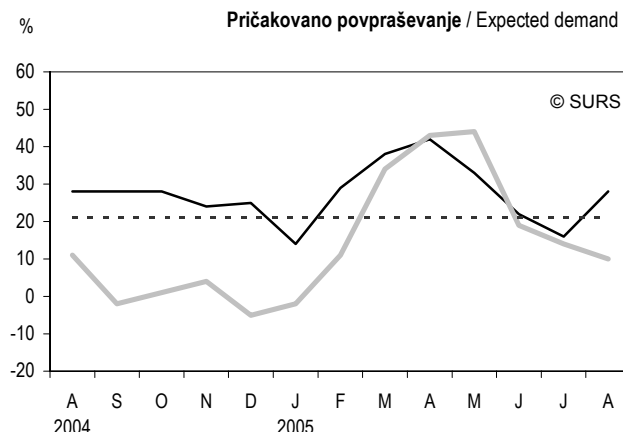
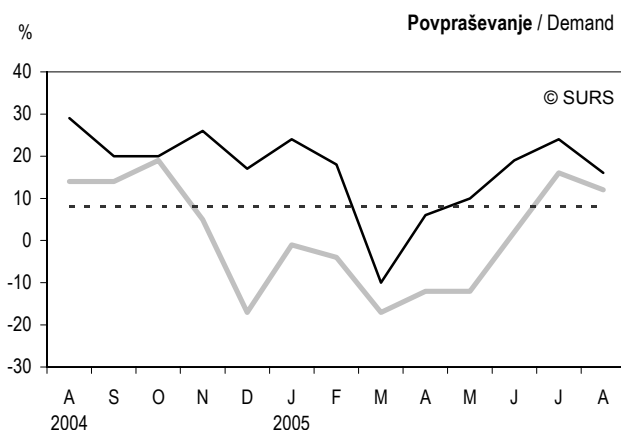
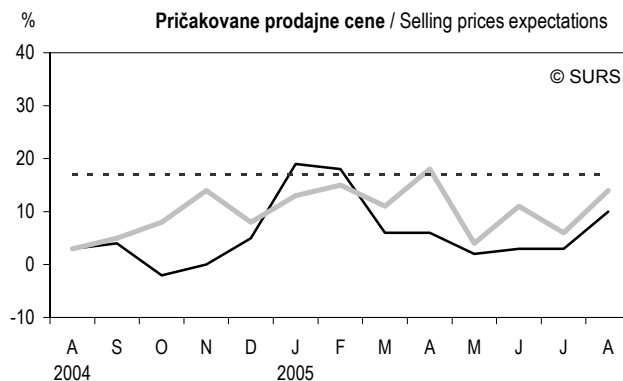
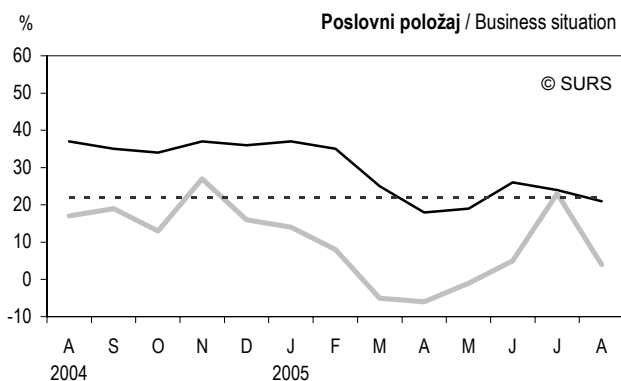


2.1 Gibanje ekonomskih kazalcev v gostinstvu in s turizmom povezanih dejavnostih, avgust 2004 - avgust 2005

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

Ocena stanj / Appreciation of situation

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



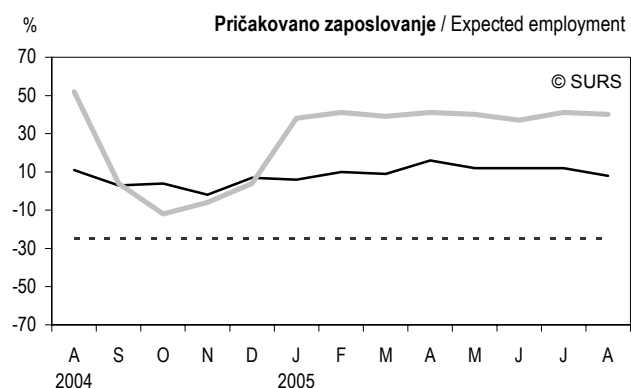
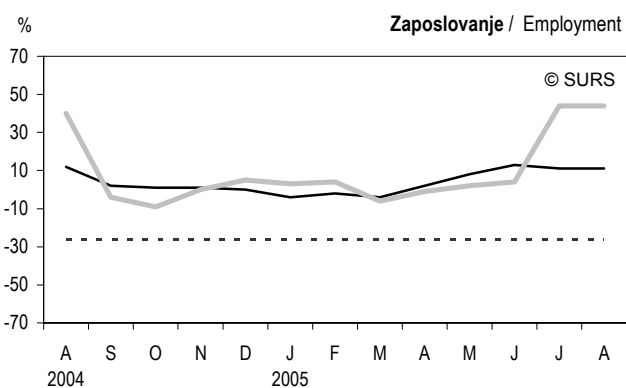
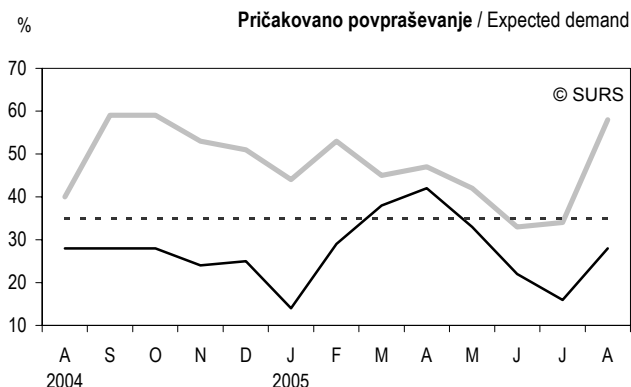
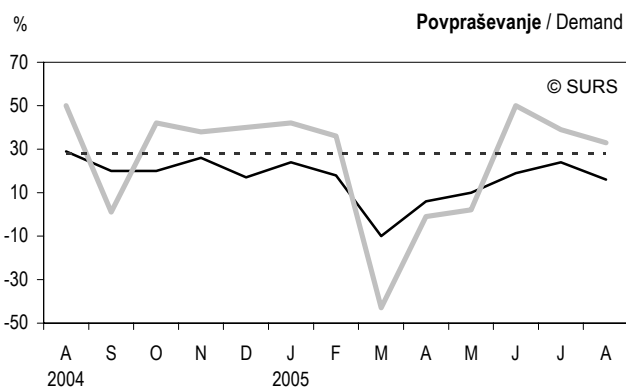
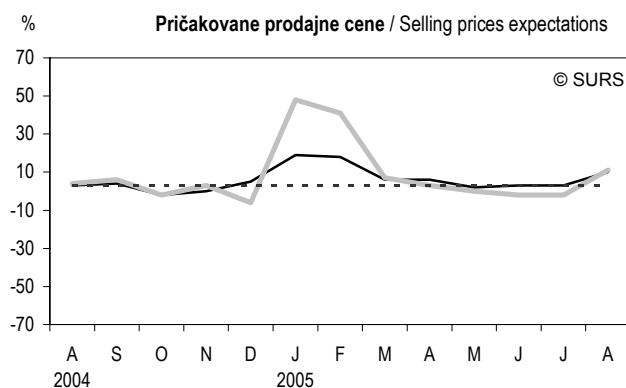
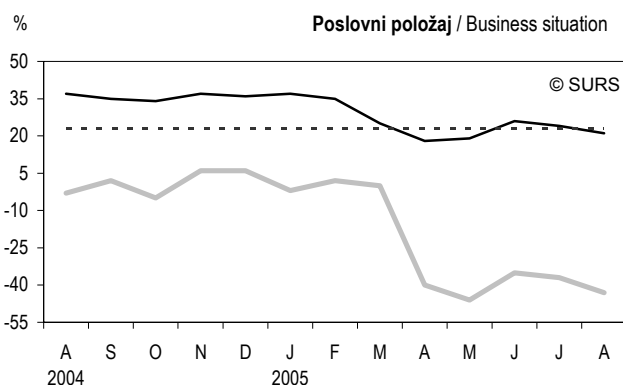
— gostinstvo in s turizmom povezane dejavnosti
hotels and restaurants, and tourist assistance activities

— storitvene dejavnosti
services

- - - - - dolgoletno povprečje
long-term average

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

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

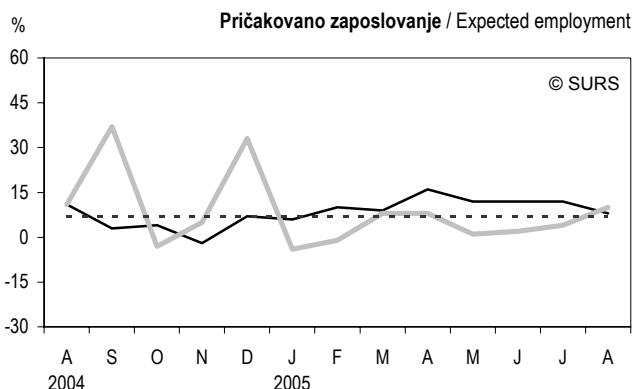
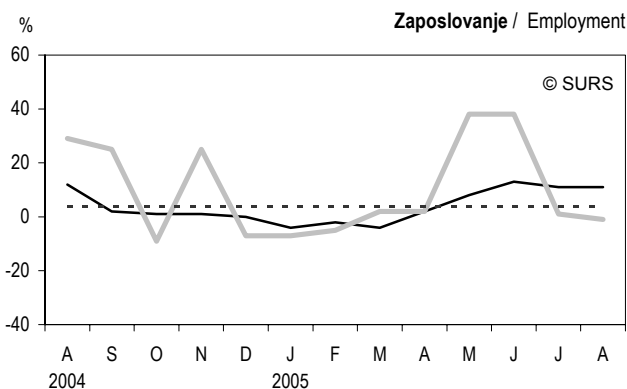
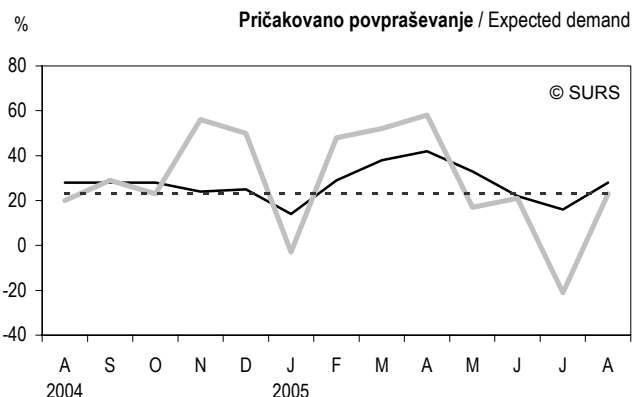
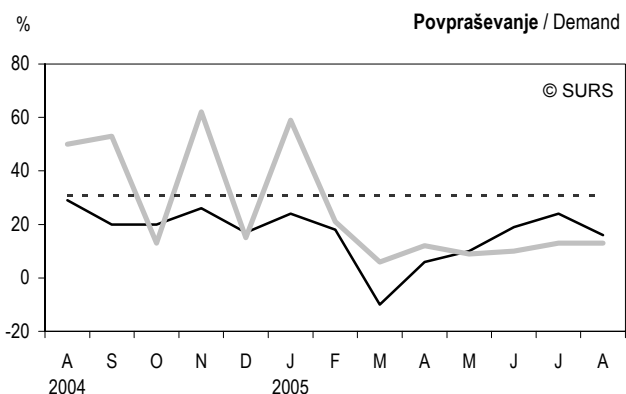
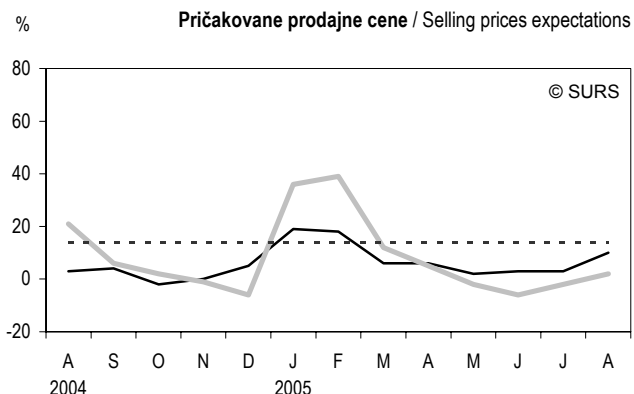
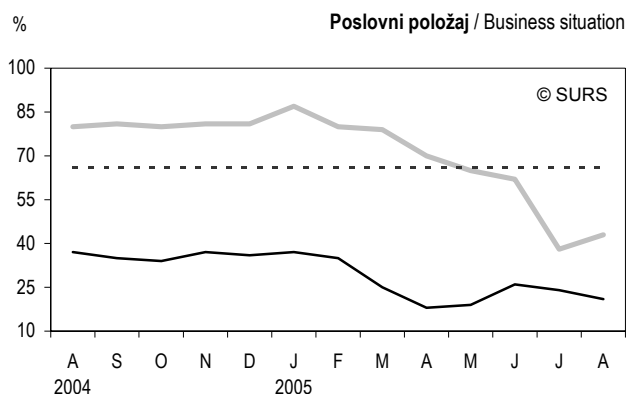


2.3 Gibanje ekonomskih kazalcev za dejavnost pošte, telekomunikacij in obdelava podatkov, avgust 2004 - avgust 2005

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

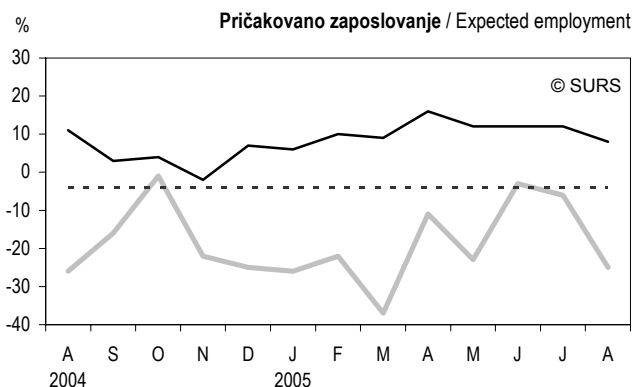
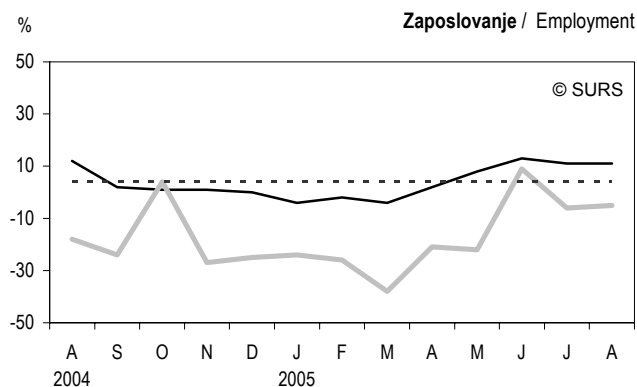
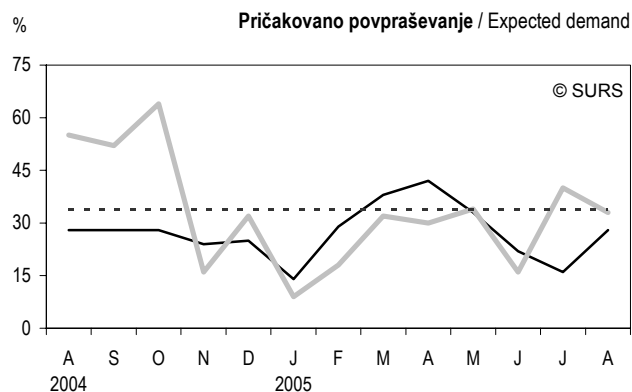
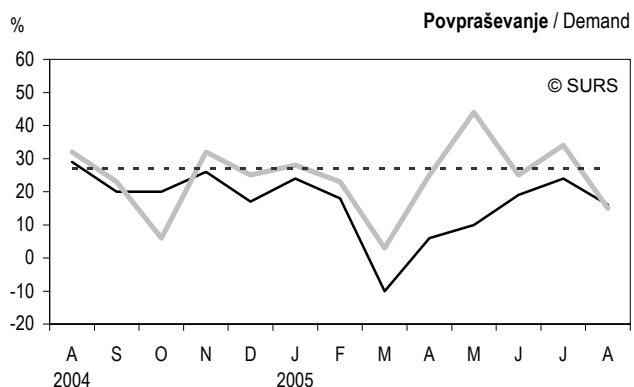
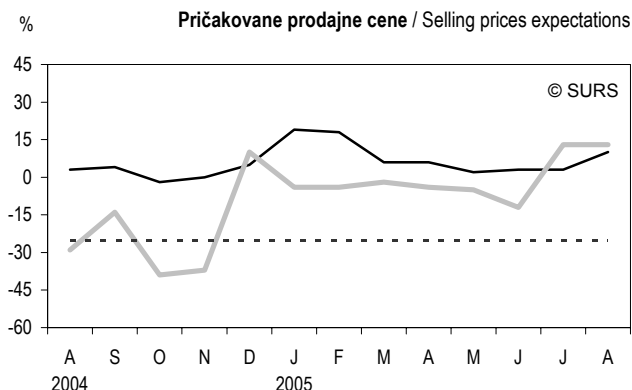
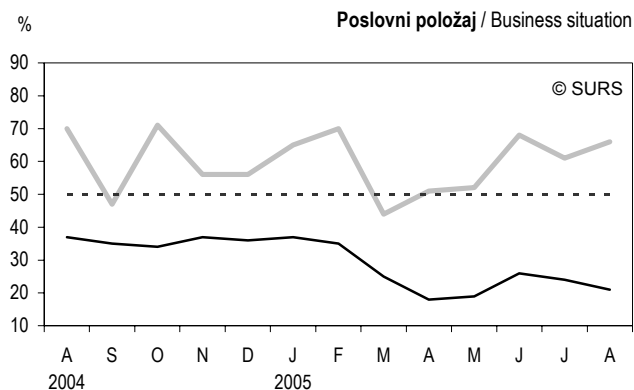
- - - - - dolgoletno povprečje
long-term average

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

Evolution of economic indicators in financial intermediation, August 2004 - August 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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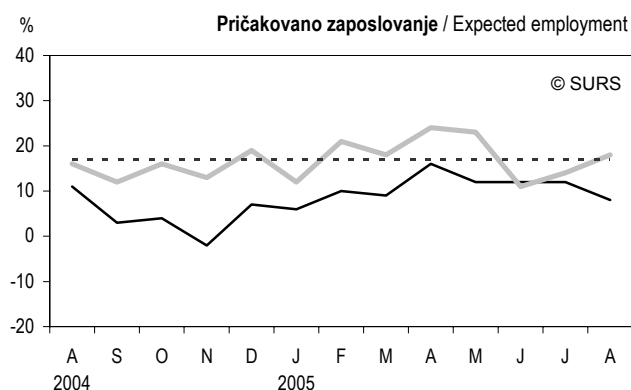
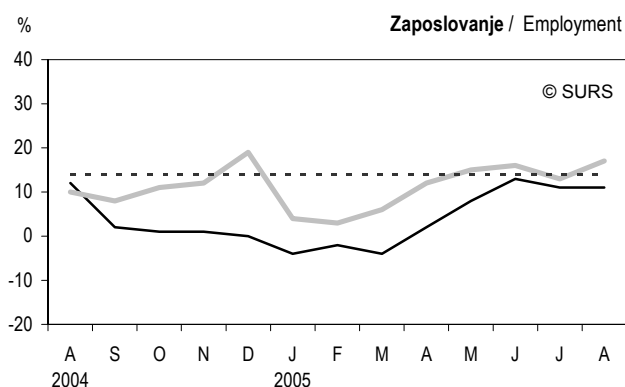
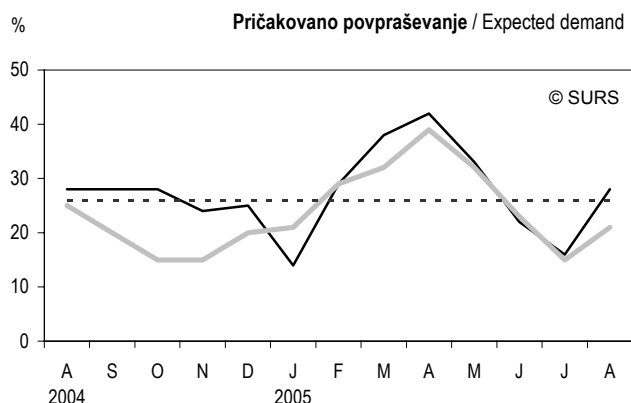
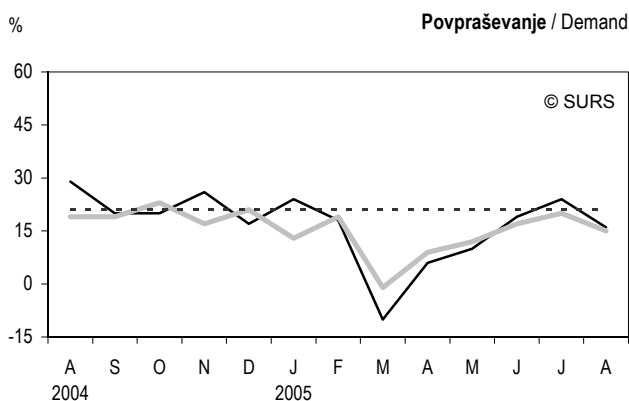
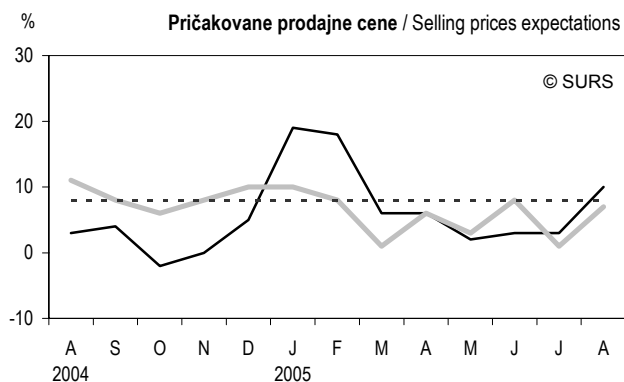
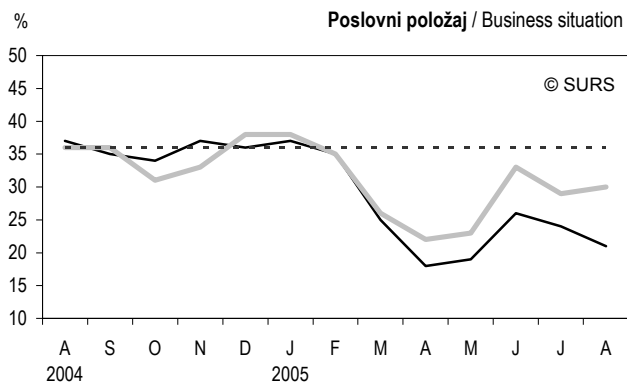


2.5 Gibanje ekonomskih kazalcev za dejavnost poslovanje z nepremičninami, najem in poslovne storitve, avgust 2004 - avgust 2005

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

Ocena stanj / Appreciation of situation

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



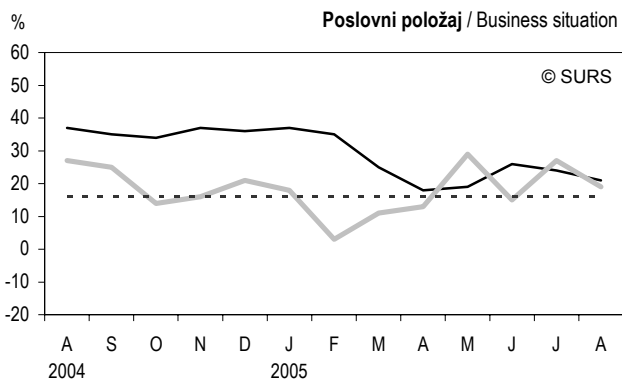
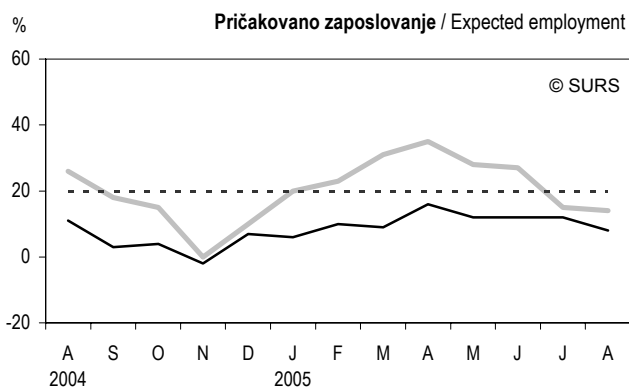
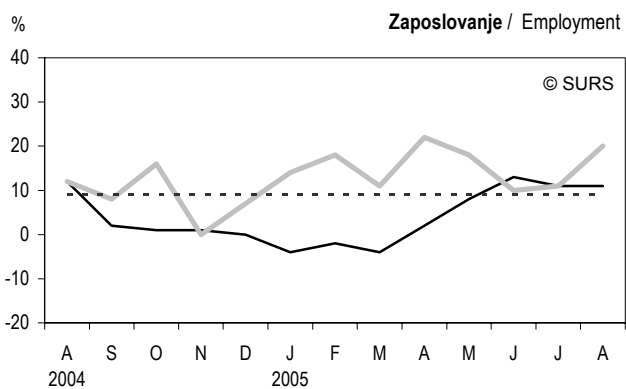
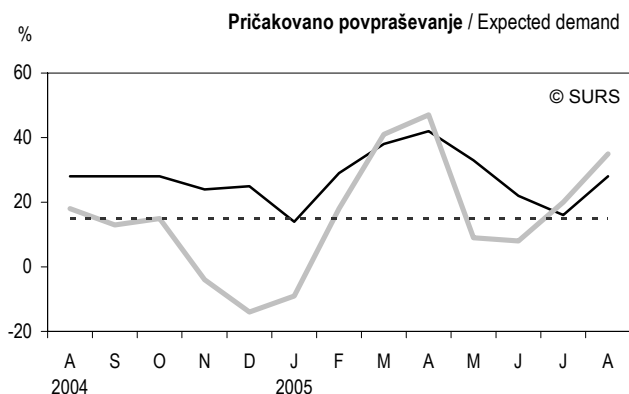
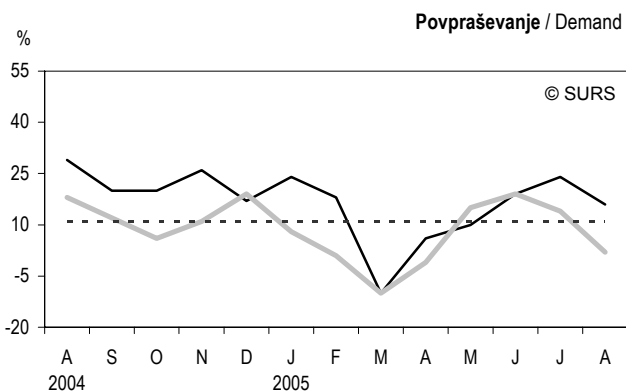
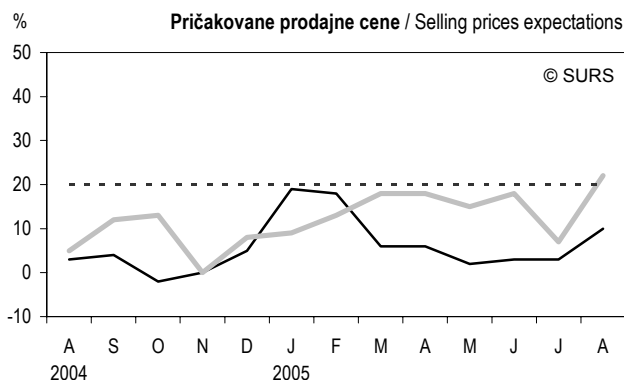
— poslovanje z nepremičninami, najem in poslovne storitve
real estate activities, renting and business services

— storitvene dejavnosti
services

- - - dolgoletno povprečje
long-term average

2.6 Gibanje ekonomskih kazalcev za dejavnost javne higiene in druge osebne storitvene dejavnosti, avgust 2004 - avgust 2005

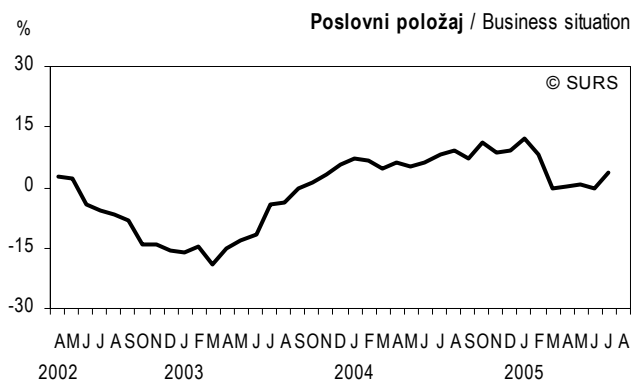
Evolution of economic indicators in sewage disposal and other service activities, August 2004 - August 2005

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

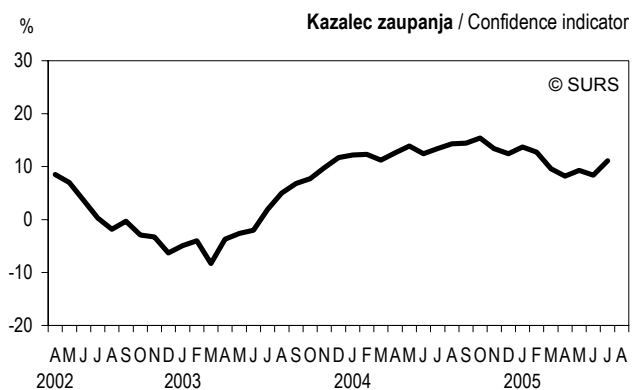
3. GIBANJE EKONOMSKIH KAZALCEV V STORITVENIH DEJAVNOSTIH V EU¹⁾, APRIL 2002 - AVGUST 2005

EVOLUTION OF ECONOMIC INDICATORS IN SERVICES IN EU¹⁾, APRIL 2002 - AUGUST 2005

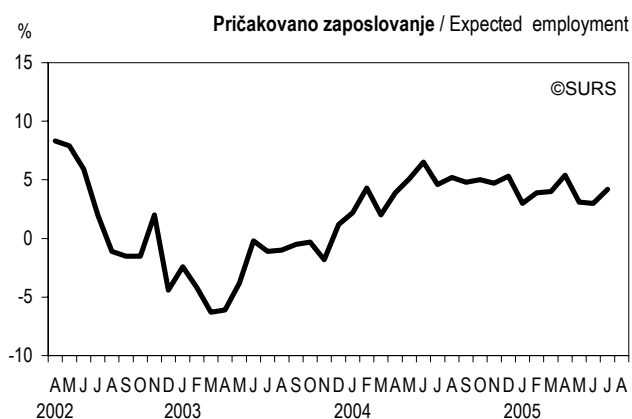
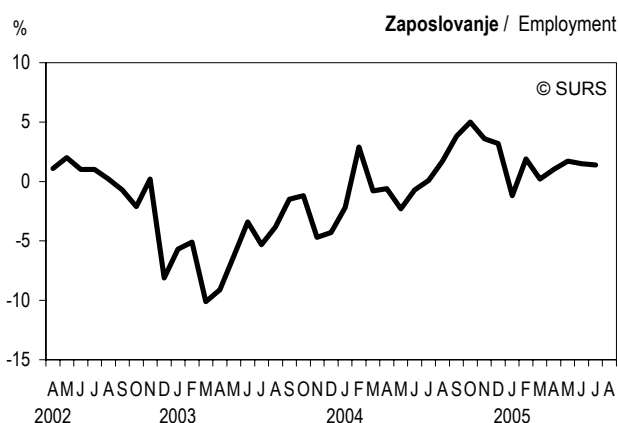
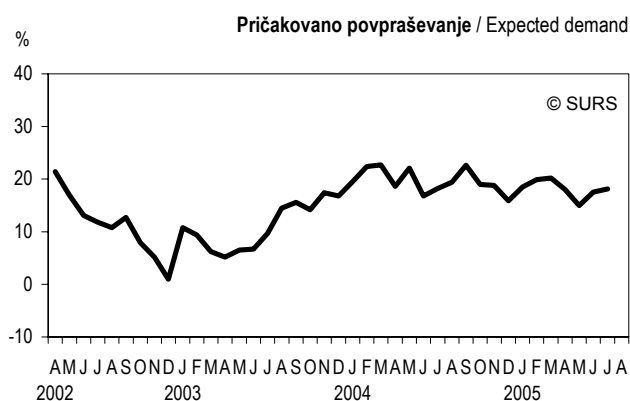
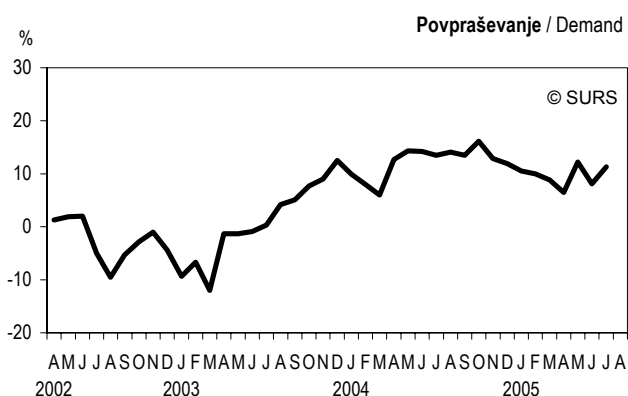
Ocena stanj / Appreciation of situation



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). Podatki so sezonsko prilagojeni. Podatki za zadnji mesec niso na voljo.

The source for the EU data is the European Commission (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 (SKD):

- 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?

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?

KOMENTAR

V avgustu 2005 se je vrednost kazalca zaupanja v storitvenih dejavnostih v primerjavi s stanjem v preteklem mesecu dvignila za 1 odstotno točko. V primerjavi z avgustom 2004 in v primerjavi z lanskim povprečjem pa se je njegova vrednost zmanjšala za 9 oz. za 6 odstotnih točk.

POSLOVNI POLOŽAJ

Poslovni položaj v zadnjih treh mesecih se je v vseh treh primerjavah poslabšal: v primerjavi s preteklim mesecem je bil ta kazalec nižji za 3 odstotne točke, v primerjavi z avgustom 2004 za 16 odstotnih točk in v primerjavi z lanskim povprečjem za 13 odstotnih točk.

POVPRAŠEVANJE

V zadnjih 3 mesecih se je povpraševanje po storitvah zmanjšalo, kajti kazalec sedanje povpraševanje se je v primerjavi s preteklim mesecem znižal za 8 odstotnih točk. Nižji pa je bil tudi od vrednosti v lanskem avgustu – za 13 odstotnih točk – in od lanskega povprečja – za 6 odstotnih točk. Po drugi strani pa so bili direktorji dokaj optimistični glede gibanja povpraševanja v naslednjih treh mesecih. Vrednost kazalca pričakovano povpraševanje se je v primerjavi z julijem 2005 povečala kar za 12 odstotnih točk, hkrati je bila enaka kot v avgustu 2004 in za 2 odstotni točki višja od lanskega povprečja.

ZAPOSLOVANJE

V avgustu 2005 so direktorji ocenili, da se zaposlovanje v zadnjih 3 mesecih v primerjavi s preteklim mesecem ni spremenilo. Kazalec zaposlovanja je bil namreč enak kot v juliju 2005. V primerjavi z istim mesecem lanskega leta je nekoliko padel (za 1 odstotno točko), hkrati pa je bil za 11 odstotnih točk višji od lanskega povprečja. Kazalec pričakovano zaposlovanje napoveduje, da se bo zaposlovanje v naslednjih treh mesecih zmanjšalo; v primerjavi z julijem 2005 je bil kazalec nižji za 4, v primerjavi z avgustom 2004 pa za 3 odstotne točke. Še vedno pa je bil za 4 odstotne točke višji od lanskega povprečja.

PRODAJNE CENE

Direktorji so v avgustu 2005 ocenili, da se bodo prodajne cene v storitvenih dejavnostih v naslednjih treh mesecih zvišale, saj se je ta kazalec dvignil v vseh treh primerjavah: v primerjavi s preteklim mesecem in v primerjavi z avgustom 2004 za 7, v primerjavi z lanskim povprečjem pa za 6 odstotnih točk.

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COMMENT

In August 2005 a slight rise of the service confidence indicator was registered in comparison with the previous month, namely by 1 percentage point. Compared to August 2004 the service confidence indicator fell by 9 percentage points and compared to last year's average by 6 percentage points.

BUSINESS SITUATION

The business situation in the past three months worsened in all three comparisons. Compared to the previous month its indicator went down by 3 percentage points, compared to August 2004 by 16 percentage points and compared to last year's average by 13 percentage points.

DEMAND

In the past three months the demand for services fell; the indicator of the present demand dropped by 8 percentage points compared to the previous month. Compared to August 2004 it dropped by 13 percentage points and compared to last year's average by 6 percentage points. On the other hand, managers were quite optimistic about the demand developments in the next three months. Compared to July 2005 the expected demand indicator rocketed by 12 percentage points, compared to August 2004 it remained unchanged and compared to last year's average it went up by 2 percentage points.

EMPLOYMENT

According to managers' estimates in August 2005, employment remained unchanged in the past three months in comparison with the previous month. The employment indicator was namely the same as in July 2005. Compared to August 2004 this indicator slightly fell (by 1 percentage point) and it was 11 percentage points above last year's average. According to the expected employment indicator, the employment in the next three months will fall when compared with the previous month and with August 2004 by 4 and 3 percentage points, respectively. However, the indicator increased by 4 percentage points compared to last year's average.

SELLING PRICES

In August 2005 managers estimated that selling prices will rise in the next three months as this indicator went up in all three comparisons. In comparison with the previous month as well as in comparison with August 2004 the indicator went up by 7 percentage points and by 6 percentage points when compared to last year's average.

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