



STATISTIČNE INFORMACIJE RAPID REPORTS

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14 POSLOVNI SUBJEKTI BUSINESS ENTITIES

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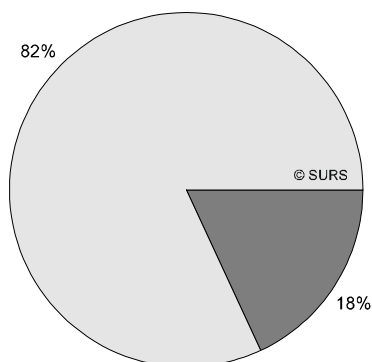
POVPRAŠEVANJE PO STORITVAH, SLOVENIJA, 2003-2004

DEMAND FOR SERVICES, SLOVENIA, 2003-2004

- ▶ Stroški nakupa storitev so v letu 2003 predstavljali 18 % celotnega nakupa proizvodov, materiala, blaga in storitev.
- ▶ Največji del nakupa storitev so v letu 2003 predstavljali stroški prometa, skladiščenja, zvez in poštinih storitev (24 %), sledili so stroški, povezani s trženjem in prodajo (16,5 %), in stroški, vezani na pomožne storitve (11,8 %).
- ▶ Pri vsaki skupini storitev je manj kot 10 % poslovnih subjektov navedlo, da so v letu 2004 storitve kupovali pri zunanjih dobaviteljih, ki niso iz Slovenije.
- ▶ Ovire, povezane z lokacijo, so bile v letu 2004 pri večini skupin storitev najpogostejše navedene kot ovire, povezane z nabavo storitev zunaj naše države.
- ▶ In 2003 the costs for purchasing services amounted to 18% of total purchases of goods and services.
- ▶ The largest share of total costs of services in 2003 was represented by transport, logistics and postal services with 24%, followed by marketing and sales-related services with 16.5% and auxiliary services with 11.8%.
- ▶ For each group of services less than 10% of business entities stated that in 2004 services were purchased from external providers outside Slovenia.
- ▶ Barriers related to location were the most frequent barriers related to purchase of services outside our country for most groups of services in 2004.

Slika 1: Nakup proizvodov, materiala, blaga in nakup storitev, Slovenija, 2003

Chart 1: Purchase of goods and services, Slovenia, 2003

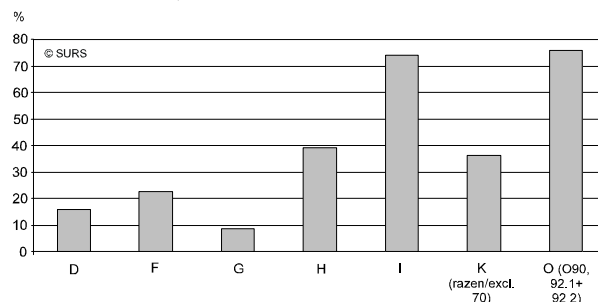


 Nakup storitev
Purchase of services

 Nakup proizvodov, materiala in blaga
Purchase of goods

Slika 2: Delež nakupa storitev v celotnem nakupu proizvodov, materiala, blaga in storitev po glavni dejavnosti poslovnega subjekta, Slovenija, 2003

Chart 2: Share of purchases of services in total purchases of goods and services by main economic activity of business entities, Slovenia, 2003



D Predelovalne dejavnosti / Manufacturing

F Gradbeništvo / Construction

G Trgovina; popravila motornih vozil in izdelkov široke porabe
Wholesale&retail, repair motor vehicles, personal& household goods

H Gostinstvo / Hotels and restaurants

I Promet, skladiščenje in zveze / Transport, storage and communication

K (razen/excl. 70) Najem in poslovne storitve / Renting and business activities

O (O90, 92.1+ 92.2) Dejavnosti javne higiene; filmska in videodejavnost;
radijska in televizijska dejavnost
Sewage and refuse disposal, sanitation and similar activities;
motion picture and video activities; radio and television activities

1. Struktura nakupa storitev po skupinah storitev in po dejavnosti poslovnega subjekta, Slovenija, 2003

Structure of purchase of services by groups of services and by economic activity of business entities, Slovenia, 2003

%

	Dejavnost poslovnega subjekta Economic activity of business entities								
	DEJAV- NOSTI SKUPAJ TOTAL ACTIVI- TIES	D	F	G	H	I	K (razen excl. 70)	O (090, 92.1+ 92.2)	
		predelo- valne dejavnosti manufac- turing	gradbe- ništvo construc- tion	trgovina; popravila motornih vozil in izdelkov široke porabe wholesale& retail, repair motor vehicles, personal& household goods	gostinstvo hotels and restaurants	promet, skladi- ščenje in zveze transport, storage and commun- ication	najem in poslovne storitve renting and business activities	dejavnosti javne higijene; filmska in videode- javnost; radijska in televizijska dejavnost sewage and refuse disposal, sanitation and similar activities; motion picture and video activities; radio and television activities	
Promet, skladiščenje, zveze in poštne storitve	24,0	23,0	21,2	17,8	5,9	40,4	10,1	10,4	Transport, logistics and postal services
Storitve IKT	7,1	4,1	2,4	5,0	5,5	15,7	8,1	9,6	ICT services
Storitve, povezane s trženjem in prodajo	16,5	17,5	5,5	29,2	9,0	11,9	11,9	3,0	Marketing and sales-related services
Poslovne storitve	9,1	11,6	13,6	7,0	6,8	3,1	12,9	12,9	Professional and business services
Storitve, povezane s človeškimi viri	6,6	8,4	8,9	4,3	10,7	2,9	7,7	17,4	Human resources related services
Finančno posredništvo ter storitve zavarovalnic in pokojskih skladov	5,5	5,5	8,4	7,3	5,9	3,8	3,3	2,6	Financial and insurance services
Najemanje in poslovni lizing	7,7	5,5	7,2	14,3	14,2	6,1	6,7	5,4	Renting and operational leasing
Storitve raziskovanja in razvoja	1,6	2,9	0,8	0,5	0,5	0,1	3,6	1,2	Research and development services
Projektiranje in tehnično svetovanje	3,5	1,9	6,7	1,3	2,1	0,2	21,9	0,7	Architectural, engineering and related technical consultancy services
Pomožne storitve	11,8	14,9	5,4	9,1	25,2	11,0	10,1	8,7	Auxiliary services
Plačilo za uporabo neopredmetenih pravic	1,2	1,4	0,2	0,9	1,4	0,4	2,3	10,8	Royalties and license fees
Druge storitve	5,3	3,4	19,7	3,2	12,6	4,3	1,5	17,2	Other services
STORITVE SKUPAJ	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	TOTAL OF SERVICES

2. Glavni dobavitelji storitev po skupinah storitev, Slovenija, 2004

Main service providers by groups of services, Slovenia, 2004

%

	Glavni dobavitelj storitev Main service provider				
	družba sama the enterprise itself	znotraj skupine družbe within the same enterprise group	zunanji dobavitelj external provider	storitve ne uporabljamo / ne vem the service is not used / do not know	
Promet, skladiščenje, zveze in poštne storitve	23,4	4,0	71,6	0,9	Transport, logistics and postal services
Storitve IT	27,8	8,9	60,3	3,0	IT services
Raziskovanje trga	44,4	8,0	19,0	28,7	Market research
Oglaševanje	29,7	5,6	49,6	15,1	Advertising
Pravne storitve	14,6	8,5	71,7	5,2	Legal services
Računovodstvo in knjigovodstvo	62,2	9,1	28,6	0,0	Accounting and book-keeping
Podjetniško in poslovno svetovanje	26,5	11,0	37,0	25,5	Business management and consultancy
Storitve, povezane s človeškimi viri	33,2	8,3	49,8	8,8	Human resources related services
Finančno posredništvo	34,0	8,0	57,0	0,9	Financial services
Storitve zavarovalnic in pokojninskih skladov	6,9	3,4	82,9	6,7	Insurance services
Najemanje in poslovni lizing	12,6	6,3	65,7	15,5	Renting and operational leasing
Projektiranje in tehnično svetovanje	31,3	7,7	26,1	35,0	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	44,2	4,1	48,0	3,7	Industrial cleaning services
Poizvedovanje in varovanje	18,6	4,9	60,9	15,6	Investigation and security services

2.1 Vrsta nakupa pri zunanjih dobaviteljih storitev po skupinah storitev, Slovenija, 2004

Type of purchase from external service providers by groups of services, Slovenia, 2004

%

	Vrsta nakupa Type of purchase		
	tekoči nakup current purchases	nakup na osnovi dolgoročne pogodbe purchase based on long term contracts	
Promet, skladiščenje, zveze in poštne storitve	63,1	36,9	Transport, logistics and postal services
Storitve IT	42,3	57,7	IT services
Raziskovanje trga	78,7	21,3	Market research
Oglaševanje	84,8	15,2	Advertising
Pravne storitve	63,2	36,8	Legal services
Računovodstvo in knjigovodstvo	29,1	70,9	Accounting and book-keeping
Podjetniško in poslovno svetovanje	75,2	24,8	Business management and consultancy
Storitve, povezane s človeškimi viri	80,3	19,7	Human resources related services
Finančno posredništvo	65,1	34,9	Financial services
Storitve zavarovalnic in pokojninskih skladov	35,1	64,9	Insurance services
Najemanje in poslovni lizing	35,1	64,9	Renting and operational leasing
Projektiranje in tehnično svetovanje	84,1	15,9	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	33,7	66,3	Industrial cleaning services
Poizvedovanje in varovanje	27,3	72,7	Investigation and security services

3. Glavni dobavitelji storitev po skupinah storitev in po dejavnosti poslovnega subjekta, Slovenija, 2004

Main service providers by groups of services and by economic activity of business entities, Slovenia, 2004

%

	Dejavnost poslovnega subjekta Economic activity of business entities							
	D	F	G	H	I	K (razen excl. 70)	O (O90, 92.1+ 92.2)	DEJAV- NOSTI SKUPAJ TOTAL ACTIVI- TIES
	predelo- valne dejavnosti manufa- cturing	gradbeni- štvo constru- ction	trgovina; popravila motornih vozil in izdelkov široke porabe wholesale & retail, repair motor vehicles, personal & house- hold goods	gostin- stvo hotels and restau- rants	promet, skladišče- nje in zveze transport, storage and communi- cation	najem in poslovne storitve renting and business activities	dejavno- sti javne higijene; filmska in videode- javnost; radijska in televizijska dejavnost sewage and refuse disposal, sanitation and similar activities; motion picture and video activities; radio and television activities	
Promet, skladiščenje, zveze in poštne storitve								Transport, logistics and postal services
Družba sama	22,3	33,5	22,7	13,5	25,8	20,0	34,3	23,4 The enterprise itself
Znotraj skupine družb	4,1	4,7	1,6	4,1	8,6	5,2	0,0	4,0 Within the same enterprise group
Zunanji	72,7	60,2	75,5	82,4	65,6	73,0	65,7	71,6 External
Storitve ne uporabljamo / Ne vem	0,9	1,6	0,2	0,0	0,0	1,8	0,0	0,9 The service is not used / Do not know
Storitve IT								IT services
Družba sama	25,9	31,9	22,8	23,9	23,7	40,0	39,0	27,8 The enterprise itself
Znotraj skupine družb	11,4	2,1	8,4	9,8	11,8	7,4	0,0	8,9 Within the same enterprise group
Zunanji	61,4	60,4	66,4	60,0	55,7	49,5	61,0	60,3 External
Storitve ne uporabljamo / Ne vem	1,3	5,6	2,4	6,3	8,8	3,1	0,0	3,0 The service is not used / Do not know
Raziskovanje trga								Market research
Družba sama	48,5	41,3	42,9	27,7	47,2	39,3	65,7	44,4 The enterprise itself
Znotraj skupine družb	11,6	4,0	6,0	4,8	6,0	5,5	0,0	8,0 Within the same enterprise group
Zunanji	19,0	8,9	30,3	20,5	8,1	17,1	11,4	19,0 External
Storitve ne uporabljamo / Ne vem	20,8	45,7	20,8	47,0	38,8	38,1	22,9	28,7 The service is not used / Do not know
Oglaševanje								Advertising
Družba sama	30,5	36,5	24,6	27,0	28,9	28,1	36,2	29,7 The enterprise itself
Znotraj skupine družb	8,0	1,9	3,0	4,1	6,1	6,1	0,0	5,6 Within the same enterprise group
Zunanji	48,0	33,6	64,4	55,3	45,2	48,9	52,4	49,6 External
Storitve ne uporabljamo / Ne vem	13,5	28,0	8,0	13,6	19,7	16,9	11,4	15,1 The service is not used / Do not know
Pravne storitve								Legal services
Družba sama	15,6	13,8	10,3	12,1	16,9	18,7	14,3	14,6 The enterprise itself
Znotraj skupine družb	11,0	5,0	6,1	9,8	9,4	6,6	0,0	8,5 Within the same enterprise group
Zunanji	68,4	72,2	82,9	64,5	69,6	69,5	75,2	71,7 External
Storitve ne uporabljamo / Ne vem	5,0	9,0	0,7	13,6	4,1	5,2	10,5	5,2 The service is not used / Do not know
Računovodstvo in knjigovodstvo								Accounting and book-keeping
Družba sama	65,1	59,5	63,7	50,6	61,6	56,8	73,3	62,2 The enterprise itself
Znotraj skupine družb	11,8	6,1	6,2	5,0	10,2	9,6	0,0	9,1 Within the same enterprise group
Zunanji	23,0	34,4	29,9	44,4	28,2	33,6	26,7	28,6 External
Storitve ne uporabljamo / Ne vem	0,0	0,0	0,2	0,0	0,0	0,0	0,0	0,0 The service is not used / Do not know
Podjetniško in poslovno svetovanje								Business management and consultancy
Družba sama	26,0	26,6	27,6	23,0	23,6	29,6	24,8	26,5 The enterprise itself
Znotraj skupine družb	13,7	6,3	8,7	14,9	10,2	9,1	10,5	11,0 Within the same enterprise group
Zunanji	36,1	31,9	43,4	30,2	48,5	32,9	45,7	37,0 External
Storitve ne uporabljamo / Ne vem	24,2	35,3	20,3	32,0	17,7	28,4	19,1	25,5 The service is not used / Do not know

3. Glavni dobavitelji storitev po skupinah storitev in po dejavnosti poslovnega subjekta, Slovenija, 2004 (nadaljevanje)

Main service providers by groups of services and by economic activity of business entities, Slovenia, 2004 (continued)

%

	Dejavnost poslovnega subjekta Economic activity of business entities								
	D	F	G	H	I	K (razen excl. 70)	O (O90, 92.1+ 92.2)	DEJAV- NOSTI SKUPAJ TOTAL ACTIVI- TIES	
	predelo- valne dejavnosti manufa- cturing	gradbeni- štvo constru- ction	trgovina; popravila motornih vozil in izdelkov široke porabe wholesale & retail, repair motor vehicles, personal& house- hold goods	gostin- stvo hotels and restau- rants	promet, skladišče- nje in zveze transport, storage and communi- cation	najem in poslovne storitve renting and business activities	dejavno- sti javne higijene; filmska in videode- javnost; radijska in televizijs- ka dejavnost sewage and refuse disposal, sanitation and similar activities; motion picture and video activities; radio and television activities		
Storitve, povezane s človeškimi viri									Human resources related services
Družba sama	33,2	29,2	31,6	38,5	27,1	40,6	26,7	33,2	The enterprise itself
Znotraj skupine družb	10,4	4,1	6,9	1,8	12,2	8,2	7,6	8,3	Within the same enterprise group
Zunanji	49,5	56,3	51,3	47,0	43,2	45,3	49,5	49,8	External
Storitve ne uporabljamo / Ne vem	6,9	10,4	10,2	12,7	17,5	5,9	16,2	8,8	The service is not used / Do not know
Finančno posredništvo									Financial services
Družba sama	33,1	40,7	32,6	28,6	24,4	37,8	49,5	34,0	The enterprise itself
Znotraj skupine družb	9,2	3,1	10,0	2,8	9,6	8,0	7,6	8,0	Within the same enterprise group
Zunanji	56,7	55,9	55,6	68,7	66,1	54,2	42,9	57,0	External
Storitve ne uporabljamo / Ne vem	1,1	0,3	1,9	0,0	0,0	0,0	0,0	0,9	The service is not used / Do not know
Storitve zavarovalnic in pokojninskih skladov									Insurance services
Družba sama	7,1	10,5	5,1	4,1	5,3	6,8	10,5	6,9	The enterprise itself
Znotraj skupine družb	4,4	1,6	2,2	0,9	2,5	4,9	7,6	3,4	Within the same enterprise group
Zunanji	82,1	78,6	87,5	87,8	88,8	79,0	81,9	82,9	External
Storitve ne uporabljamo / Ne vem	6,4	9,4	5,1	7,2	3,4	9,3	0,0	6,7	The service is not used / Do not know
Najemanje in poslovni lizing									Renting and operational leasing
Družba sama	13,3	14,7	11,3	20,0	11,8	6,5	14,3	12,6	The enterprise itself
Znotraj skupine družb	9,9	2,5	2,8	1,8	5,1	4,5	15,2	6,3	Within the same enterprise group
Zunanji	59,1	66,4	78,1	57,9	70,3	72,3	41,0	65,7	External
Storitve ne uporabljamo / Ne vem	17,7	16,5	7,9	20,2	12,7	16,6	29,5	15,5	The service is not used / Do not know
Projektiranje in tehnično svetovanje									Architectural, engineering and related technical consultancy
Družba sama	35,4	30,0	24,9	21,8	26,1	35,3	19,1	31,3	The enterprise itself
Znotraj skupine družb	9,6	3,4	6,7	8,2	6,8	7,0	7,6	7,7	Within the same enterprise group
Zunanji	26,5	35,0	23,9	26,4	24,4	16,2	54,3	26,1	External
Storitve ne uporabljamo / Ne vem	28,5	31,6	44,5	43,6	42,6	41,5	19,1	35,0	The service is not used / Do not know
Čiščenje objektov in opreme									Industrial cleaning services
Družba sama	44,8	56,6	35,2	69,9	33,0	38,6	21,9	44,2	The enterprise itself
Znotraj skupine družb	5,5	3,1	1,9	0,0	4,4	4,6	7,6	4,1	Within the same enterprise group
Zunanji	46,6	33,2	59,6	30,1	58,6	52,2	67,6	48,0	External
Storitve ne uporabljamo / Ne vem	3,1	7,2	3,2	0,0	4,1	4,5	2,9	3,7	The service is not used / Do not know
Poizvedovanje in varovanje									Investigation and security services
Družba sama	20,6	24,9	9,3	20,2	11,2	21,8	16,2	18,6	The enterprise itself
Znotraj skupine družb	7,1	2,8	1,8	0,9	5,1	5,9	7,6	4,9	Within the same enterprise group
Zunanji	59,9	43,3	79,5	62,7	60,6	53,4	73,3	60,9	External
Storitve ne uporabljamo / Ne vem	12,4	29,0	9,5	16,1	23,0	19,0	2,9	15,6	The service is not used / Do not know

4. Lokacija zunanjih dobaviteljev storitev po skupinah storitev, Slovenija, 2004

Location of external service providers by groups of services, Slovenia, 2004

%

	Lokacija zunanjih dobaviteljev storitev The location of external service providers			
	v sloveniji in slovenia	v državah EU (EU 15) ¹ in EU Member States (EU 15) ¹	drugo ² other ²	
Promet, skladiščenje, zveze in poštne storitve	97,7	1,1	1,2	Transport, logistics and postal services
Storitve IT	97,5	1,2	1,3	IT services
Raziskovanje trga	90,0	5,8	4,2	Market research
Oglaševanje	97,2	1,5	1,4	Advertising
Pravne storitve	99,5	0,2	0,2	Legal services
Računovodstvo in knjigovodstvo	99,2	0,1	0,7	Accounting and book-keeping
Podjetniško in poslovno svetovanje	96,6	2,9	0,6	Business management and consultancy
Storitve, povezane s človeškimi viri	99,4	0,1	0,5	Human resources related services
Finančno posredništvo	99,0	0,7	0,3	Financial services
Storitve zavarovalnic in pokojninskih skladov	99,5	0,3	0,2	Insurance services
Najemanje in poslovni lizing	98,9	0,5	0,7	Renting and operational leasing
Projektiranje in tehnično svetovanje	96,8	2,9	0,3	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	99,8	0,1	0,1	Industrial cleaning services
Poizvedovanje in varovanje	99,7	0,1	0,3	Investigation and security services

1) EU 15: Avstrija, Belgija, Danska, Finska, Francija, Grčija, Irska, Italija, Luksemburg, Nemčija, Nizozemska, Portugalska, Švedska, Španija, Velika Britanija

EU 15: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Portugal, Netherlands, Sweden, Spain, UK

2) Drugo: Nove članice EU (Ciper, Češka Republika, Estonija, Latvija, Litva, Madžarska, Malta, Poljska, Slovaška), Izven EU ali Ne vem
Other: New Member States (Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia), Outside the EU or Do not know**4.1 Lokacija zunanjih dobaviteljev storitev v Sloveniji po skupinah storitev, Slovenija, 2004**

Location of external service providers in Slovenia by groups of services, Slovenia, 2004

%

	Lokacija zunanjih dobaviteljev storitev v Sloveniji The location of external service providers in Slovenia		
	v isti regiji in the same region	v drugi regiji in another region	
Promet, skladiščenje, zveze in poštne storitve	86,6	13,4	Transport, logistics and postal services
Storitve IT	70,0	30,0	IT services
Raziskovanje trga	71,1	28,9	Market research
Oglaševanje	74,3	25,7	Advertising
Pravne storitve	87,9	12,1	Legal services
Računovodstvo in knjigovodstvo	90,8	9,2	Accounting and book-keeping
Podjetniško in poslovno svetovanje	73,7	26,3	Business management and consultancy
Storitve, povezane s človeškimi viri	85,3	14,7	Human resources related services
Finančno posredništvo	82,4	17,6	Financial services
Storitve zavarovalnic in pokojninskih skladov	83,7	16,3	Insurance services
Najemanje in poslovni lizing	75,7	24,3	Renting and operational leasing
Projektiranje in tehnično svetovanje	78,1	21,9	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	91,8	8,2	Industrial cleaning services
Poizvedovanje in varovanje	90,7	9,3	Investigation and security services



5. Ovire, povezane z nabavo storitev v drugi državi, po skupinah storitev, Slovenija, 2004
Barriers related to purchases of services in other countries by groups of services, Slovenia, 2004

%

	Ovire, povezane z nabavo storitev v drugi državi Barriers related to purchase of services in other countries									
	ovire poveza- ne z lokacijo barriers related to location	pravne in zakon- ske ovire legal and regula- tory barriers	jezi- kovne ovire lan- guage barriers	ovire zau- panja (stan- dardi, kako- vost) trust barriers (stan- dards, quality)	eko- nomske ovire eco- nomic barriers	težave pri identi- ficiranju primer- nega tujega dobavi- telja difficul- ties to identify suitable foreign service provi- ders	ne opa- žamo ovir no barriers perce- ived	skupina storitev ni pome- mbna the service is not relevant	ne vem do not know	
Promet, skladiščenje, zveze in poštne storitve	27,8	4,9	3,3	4,8	9,4	5,3	24,9	5,8	13,7	Transport, logistics and postal services
Storitve IT	18,5	5,9	6,4	6,8	8,5	5,3	22,5	7,6	18,5	IT services
Raziskovanje trga	9,3	3,9	5,4	6,8	12,2	9,4	23,5	10,8	18,7	Market research
Oglaševanje	10,9	2,0	6,3	4,5	13,0	6,7	28,6	9,7	18,3	Advertising
Pravne storitve	14,2	15,6	7,7	5,6	7,4	4,2	20,0	7,8	17,6	Legal services
Računovodstvo in knjigovodstvo	18,5	17,6	5,8	5,9	3,4	2,4	21,3	8,0	17,2	Accounting and book-keeping
Podjetniško in poslovno svetovanje	10,9	9,0	4,8	6,7	10,6	6,0	22,4	10,4	19,2	Business management and consultancy
Storitve, povezane s človeškimi viri	16,1	8,8	8,5	5,3	6,0	6,0	22,4	9,2	17,7	Human resources related services
Finančno posredništvo	9,7	11,1	2,6	8,8	7,1	6,4	25,2	9,7	19,3	Financial services
Storitve zavarovalnic in pokojninskih skladov	11,5	12,7	3,0	7,7	5,1	7,0	25,0	8,7	19,2	Insurance services
Najemanje in poslovni lizing	11,4	7,2	2,0	5,4	7,4	5,9	28,4	12,6	19,7	Renting and operational leasing
Projektiranje in tehnično svetovanje	13,2	4,9	5,5	6,4	8,3	6,8	23,5	10,7	20,8	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	28,7	0,2	3,1	2,8	8,0	2,8	25,1	10,7	18,6	Industrial cleaning services
Poizvedovanje in varovanje	25,9	2,4	2,5	4,8	6,6	3,9	22,1	11,7	20,0	Investigation and security services

6. Pričakovanja o prihodnjih nakupih storitev pri zunanjih dobaviteljih (domačih in tujih) po skupinah storitev, Slovenija, 2004
Expectations of future purchasing of services from external providers (both domestic and foreign) by groups of services, Slovenia, 2004

%

	Pričakovanja o prihodnjih nakupih storitev pri zunanjih dobaviteljih Expectations of future purchasing of services from external providers				
	zmanjšanje decrease	nespremenjeno unchanged	povečanje increase	ne vem do not know	
Promet, skladiščenje, zveze in poštne storitve	8,5	53,0	33,7	4,7	Transport, logistics and postal services
Storitve IT	5,0	44,3	42,2	8,4	IT services
Raziskovanje trga	2,3	39,4	46,6	11,7	Market research
Oglaševanje	4,1	39,1	48,6	8,2	Advertising
Pravne storitve	5,1	61,3	25,0	8,5	Legal services
Računovodstvo in knjigovodstvo	5,1	69,1	18,8	7,1	Accounting and book-keeping
Podjetniško in poslovno svetovanje	3,6	52,4	35,7	8,3	Business management and consultancy
Storitve, povezane s človeškimi viri	4,8	52,9	33,9	8,4	Human resources related services
Finančno posredništvo	5,0	53,6	31,6	9,8	Financial services
Storitve zavarovalnic in pokojninskih skladov	3,8	60,5	29,0	6,6	Insurance services
Najemanje in poslovni lizing	9,0	56,2	23,7	11,1	Renting and operational leasing
Projektiranje in tehnično svetovanje	5,8	51,7	29,6	12,9	Architectural, engineering and related technical consultancy
Čiščenje objektov in opreme	4,2	74,6	14,1	7,1	Industrial cleaning services
Poizvedovanje in varovanje	3,4	72,9	15,7	8,0	Investigation and security services

Slika 3: Stroški storitev in investicije, povezane s storitvami, Slovenija, 2003

Chart 3: Costs of services and service-related investments, Slovenia, 2003

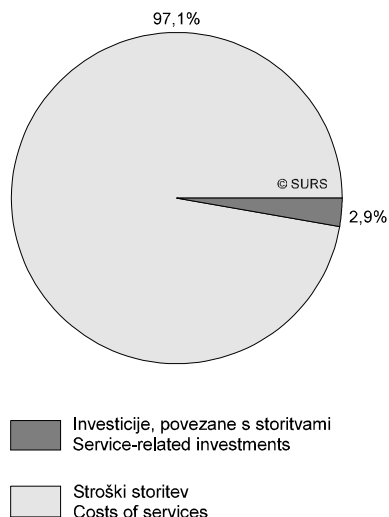
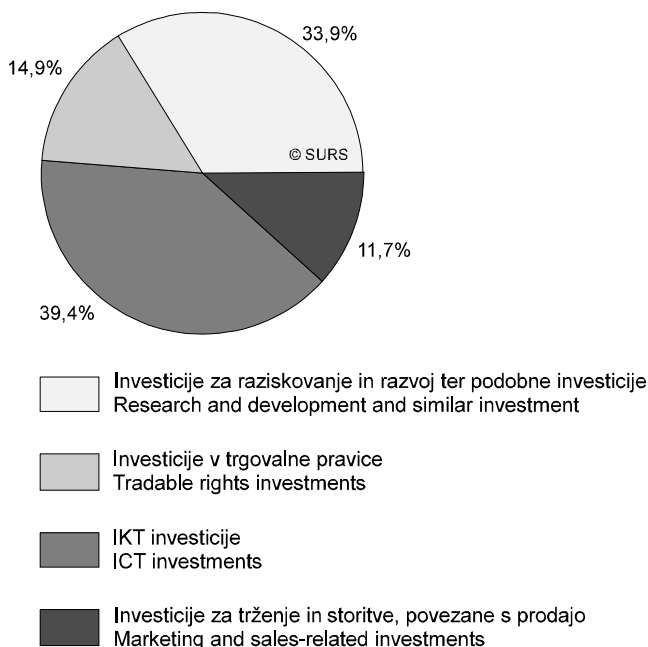
**Slika 4: Struktura investicij, povezanih s storitvami, Slovenija, 2003**

Chart 4: Structure of service-related investments, Slovenia, 2003



METODOLOŠKA POJASNILA

Namen statističnega raziskovanja

Glavni namen raziskovanja Povpraševanje po storitvah je boljše razumevanje odnosov med storitvenim sektorjem in ostalimi sektorji gospodarstva ter razlogov za rast storitvenega sektorja. Raziskovanje je dalo vpogled v to, kateri sektorji gospodarstva so najpomembnejši uporabniki storitev, do katere mere je rast storitev povezana z oddajanjem opravljanja storitev, ki so bile poprej proizvedene znotraj podjetja, in kateri so razlogi za (ne)izbiro tujega dobavitelja storitev. Podatki o glavnem dobavitelju storitev, o vrsti nakupa storitev, lokaciji zunanjih dobaviteljev, ovirah, povezanih z nabavo storitev v drugi državi, ter o pričakovanih prihodnjih nakupov storitev se nanašajo na leto 2004, podatki o nakupu proizvodov, materiala, blaga in nakupu storitev, o deležu oziroma strukturi nakupa storitev ter o stroških storitev in investicijah, povezanih s storitvami, pa na leto 2003.

Objavljeni podatki so bili zbrani s pilotnim projektom, ki ga je vodila in delno financirala Evropska komisija (Eurostat). V njem so poleg Slovenije sodelovale še nekatere druge države članice EU.

Enote opazovanja

Enote statističnega opazovanja so bili poslovni subjekti iz določenih dejavnosti SKD, in sicer:

- D – Predelovalne dejavnosti;
- F – Gradbeništvo;
- G – Trgovina, popravila motornih vozil in izdelkov široke porabe;
- H – Gostinstvo;

METHODOLOGICAL EXPLANATIONS

Purpose of the statistical survey

The main purpose of the Survey on Demand for Services is to get better understanding of the relations between the services sector and other sectors of the economy and to understand the reasons for the growth of the services. The survey gave an insight into which sectors are mainly using services as external inputs in their production process, to which extent is the growth caused by an externalisation of the production of services that previously have been produced in-house and which are the reasons for selection or non-selection of a foreign supplier. Data on the main service provider, on the type of purchase of services, on the location of the external service provider, on barriers for purchasing services outside Slovenia, and on the future purchases of services correspond to the year 2004, while data on total purchase of services, on the structure of purchase of services and on service-related investments correspond to the year 2003.

Beside Slovenia, some other Member States of the European Union participated in the pilot project which was partly financed and undertaken by the European Commission (Eurostat).

Observation units

The observation units were business entities which cover the following economic areas of NACE Rev. 1:

- D - Manufacturing;
- F - Construction;
- G - Wholesale & retail, repair of motor vehicles, personal & household goods;
- H - Hotels and restaurants;

- I – Promet, skladiščenje in zveze;
- Del K – Najem in poslovne storitve;
- Del O – Dejavnosti javne higiene, filmske in videodejavnosti ter radijske in televizijske dejavnosti.

Viri in metode zbiranja podatkov

Vir podatkov o povpraševanju po storitvah je bilo Letno poročilo o povpraševanju po storitvah v letu 2003 (vprašalnik SSP/DS). Vprašalniki so bili poročevalskim enotam poslani po pošti.

Pri podatkih o investicijah, povezanih s storitvami, so bili kot vir uporabljeni tudi podatki iz letnega raziskovanja o bruto investicijah v osnovna sredstva za leto 2003 (vprašalnik INV-1).

Zajetje

Osnova za vzorčni okvir so bile enote strukturne statistike podjetij. V vzorec je bilo izbranih 2052 enot; enote s 50 in več osebami, ki delajo, so bile v vzorec izbrane z gotovostjo, enote z 20 do 49 osebami, ki delajo, pa so bile v vzorec izbrane slučajno. Delež dobljenih odgovorov (stopnja odgovora) je obsegal 82 %.

Podatki, ki so manjkali zaradi manjkajočih odgovorov spremenljivk pri vprašanju o ovirah, povezanih z nabavo storitev v drugi državi, in pri vprašanju o pričakovanih glede nakupa storitev, so bili vstavljeni, tj. imputirani (uporaba metode »najbližji sosed«). Zbrani podatki pa so bili preračunani na celotno opazovano populacijo z metodo uteževanja z razmernostno cenilko.

Definicije in druga pojasnila

Nakupi storitev, to so stroški, namenjeni za storitve, ki kot taki vstopajo v izkaz poslovnega izida, so bili razporejeni v naslednje skupine storitev (gradbeništvo ni bilo obravnavano kot storitev):

Promet, skladiščenje, zveze in poštne storitve obsegajo kopenski, vodni in zračni prevoz, skladiščenje, pomožne prometne storitve, poštne in kurirske storitve ter potne stroške.

Storitve informacijsko-komunikacijske tehnologije (IKT) obsegajo storitve telekomunikacij in storitve informacijske tehnologije (IT).

Storitve IT zajemajo svetovanje o programski opremi in računalniških programih, programsko opremo po naročilu uporabnikov, obdelavo podatkov, storitve, povezane s podatkovnimi bazami, vzdrževanje in popravila, gostovanje na medmrežju in druge z računalništvom povezane storitve ter druge informacijske storitve (paketna programska in strojna oprema se ne upoštevata).

Storitve, povezane s trženjem in prodajo, obsegajo raziskovanje trga, oglaševanje, neposredne tržne storitve, vključno s provizijami prodajnih agentov, razstave, sejme in druge marketinške ali prodajne storitve.

Poslovne storitve obsegajo pravne storitve, vključno s svetovanjem na področju patentov, računovodske, knjigovodske in revizijske storitve, davčno svetovanje, podjetniško in poslovno svetovanje, storitve holdingov.

Storitve, povezane s človeškimi viri, obsegajo izobraževanje, storitve pri zaposlovanju in posredovanju delovne sile ter zdravstvene storitve.

Finančno posredništvo ter storitve zavarovalnic in pokojninskih skladov obsegajo storitve zavarovalnic in pokojninskih skladov, razen obveznega socialnega zavarovanja, denarno posredništvo, drugo finančno posredništvo, storitve finančnih trgov, borz, poslovanje z vrednostnimi papirji, pomožne storitve v zavarovalništvu in pokojninskih skladih, pomožne storitve v finančnem posredništvu.

- I - Transport, storage and communication;
- Part of K - Renting and business activities;
- Part of O - Sewage and refuse disposal, sanitation and similar activities; motion picture and video activities; radio and television activities.

Sources and methods of data collection

The source of data on demand for services was the Annual Report on Demand for Services 2003 (questionnaire SSP/DS). The data were collected by mail with a paper questionnaire.

For the service-related investments we also used data from the annual survey on gross fixed capital formation in 2003 (questionnaire INV-1).

Coverage

The basis for the sampling frame was structural business statistics units. In the sample size of 2052 units, all units with 50 and more persons employed were chosen with certainty, while units with 20-49 persons employed were selected at random. The response rate was 82%.

Due to item non-response, imputations of data were used in order to impute missing data (by the »nearest neighbour method«) for the question on perceived barriers for purchasing services outside our country and for the question on expectations of future purchasing of services. Weighting made by ratio estimator was used to gross up the data from the sample to the total population.

Definitions and other explanations

Purchase of services that correspond to costs of services recorded in the profit and loss account was grouped into the following groups of services (construction was not treated as a service):

Transport, logistics and postal services include transport by land, water, sea, air, storage, warehousing and other logistical support, postal and courier services and travel costs.

ICT services include telecommunications and IT services.

IT services consist of hardware and software consultancy, customized software, data processing and database services, maintenance and repair services, web hosting, other computer-related services and other information services (packaged software and hardware purchases are excluded).

Marketing and sales-related services include market research, advertising, direct marketing services incl. commissions to sales agents, exhibition, fairs and other marketing or sales services.

Professional and business services include legal services, incl. patent advice, accounting, book-keeping and auditing, tax consultancy, business management and consultancy, holding services.

Human resources related services include training and educational services, staff recruitment, provision of temporary personnel, health and medical services.

Financial and insurance services include insurance and pension funding excl. compulsory social security, monetary intermediation, other financial intermediation services, financial market administration services, security broking and fund managing services, services auxiliary to insurance and pension funding, other services auxiliary to financial intermediation.

Najemanje in poslovni lizing obsegata najemanje nepremičnin, osebnih avtomobilov in drugih vozil, najemanje strojev in opreme (brez finančnega lizinga).

Storitve raziskovanja in razvoja obsegajo sredstva za raziskovanje in razvoj.

Projektiranje in tehnično svetovanje obsegata projektiranje in tehnično svetovanje, tehnično preizkušanje, analiziranje ter izdajanje certifikatov.

Pomožne storitve obsegajo čiščenje objektov in opreme, poizvedovanje ter varovanje, tajniške in prevajalske storitve, storitve klicnih centrov, pakiranje in druge pisarniške storitve, storitve menze ter pripravo in dostavo hrane, popravila in vzdrževanje izdelkov za široko uporabo (brez popravil pisarniških strojev in računalniških naprav ter brez posredovanja delovne sile), poslovanje z nepremičninami za plačilo ali po pogodbi.

Plačila za uporabo neopredmetenih pravic obsegajo koncesije in franšizing, patente, industrijsko oblikovanje, blagovne znamke, avtorske pravice, vključno z avtorskimi pravicami na področju filma in glasbe (brez programske opreme in brez pravnega svetovanja in svetovanja na področju patentov).

Druge storitve obsegajo storitve, ki niso vključene med zgoraj omenjene storitve.

Glavni dobavitelj storitev je dobavitelj, ki je v ekonomskem smislu najpomembnejši.

Tekoči nakup je nakup, ki ne temelji na pogodbi ali temelji na pogodbi, katere veljavnost je krajša od 1 leta.

Nakup na osnovi dolgoročne pogodbe je nakup na osnovi pogodbe, katere veljavnost je daljša od 1 leta.

Investicije, povezane s storitvami, predstavljajo nakup dolgoročnih neopredmetenih osnovnih sredstev in so prikazane v bilanci stanja, stroški pa se prenesejo (amortizirajo) v času življenjske dobe osnovnega sredstva. Razporejene so v naslednje skupine investicij:

IKT investicije obsegajo programsko opremo po naročilu uporabnikov in stroške za razvoj IKT, ki se prikazujejo v bilanci stanja brez paketne programske in strojne opreme.

Investicije v trgovalne pravice obsegajo koncesije in franšize, patente, industrijsko oblikovanje, blagovne znamke, originale, vključno z izvirniki na področju filma in glasbe.

Investicije za raziskovanje in razvoj ter podobne investicije obsegajo investicije v raziskovanje in razvoj, inženirsko in povezano tehnično svetovanje, tehnične preizkuse, analize ter izdajanje certifikatov.

Investicije za trženje in storitve, povezane s prodajo obsegajo raziskovanje trga, oglaševanje in druge tržne ali prodajne storitve.

DODATNO POJASNILO: Zaradi zaokroževanja se vsote včasih ne ujemajo.

KOMENTAR

Stroški za nakup storitev so v celotnem nakupu proizvodov, materiala, blaga in storitev v letu 2003 znašali 18 %. Od tega so predstavljali največ, kar 24 % vseh stroškov za nakup storitev, stroški za storitve prometa, skladiščenja, zvez in poštnih storitev, 16,5 % so predstavljali stroški, povezani s trženjem in prodajo, in 11,8 % stroški, vezani na pomožne storitve. Najmanj stroškov (manj kot 2 % vseh stroškov za nakup storitev) so predstavljali stroški za nakup storitev raziskovanja in razvoja ter za plačilo za uporabo neopredmetenih pravic.

Renting and operational leasing include real estate and letting services, renting services of automobiles, other transport equipment and other machinery and equipment (without financial leasing).

Research and development services include resources for research and experimental development.

Architectural, engineering and related technical consultancy services include engineering and related technical consultancy, technical testing, analyses and certification.

Auxiliary services include industrial cleaning, investigation and security services, secretarial and translation services, call centres, packaging and other office services, canteen and catering, repair and maintenance (excluding repair and maintenance of office-, accounting- and computing machinery and excluding provision of temporary personnel), real estate agency services on a fee or contract basis.

Royalties and license fees include concessions and franchising, patents, industrial design, trademarks, copyright incl. film and music rights, (excluding software and excluding legal and patent advice).

Other services include services that are not included in any of the above mentioned services.

The main service provider of a service is the supplier who in economic terms is most important.

Current purchases are purchases that are not based on a contract or are based on a contract of max. 1 year duration.

Purchases based on long-term contracts are purchases that are based on contracts of more than 1 year duration.

Service-related investments are purchases of (intangible) assets for long-term use, where the asset is activated in the balance sheet and the costs are depreciated over the life-cycle of the asset; they were grouped into the following groups of service-related investments:

ICT investments include customized software and balanced costs for ICT development (packaged software and hardware are excluded).

Tradable rights include concessions and franchising, patents, industrial design, trade marks, copyright incl. film and music rights.

Research and development and similar investments include R&D and experimental development, engineering and related technical consultancy, technical testing, analyses and certification.

Marketing and sales-related investments include market research, advertising and other marketing or sales services.

NOTE: The totals may not match due to rounding.

COMMENT

In 2003 the costs for purchasing services amounted to 18% of total purchases of goods and services. 24% of total costs of services were represented by transport, logistics and postal services, 16.5% by marketing and sales-related services and 11.8% by costs related to auxiliary services. Research and development and royalties and license fees represented less than 2% of total costs for purchasing services.



Če primerjamo deleže stroškov za nakup storitev po posameznih dejavnostih, ugotovimo, da so stroški za nakup storitev predstavljali v letu 2003 v dejavnostih I (promet, skladiščenje in zveze) in O (dejavnosti javne higiene, filmske in video dejavnosti ter radijske in televizijske dejavnosti) okrog 75 % celotnega nakupa, v dejavnostih G (trgovina, popravila motornih vozil in izdelkov široke porabe) in D (predelovalne dejavnosti) pa manj kot 20 % celotnega nakupa storitev.

Računovodske in knjigovodske storitve so družbe v letu 2004 v večji meri (62,2 %) opravile same, storitve zavarovalnic in pokojninskih skladov, prometa, skladiščenja, zvez in poštinih storitev ter pravne storitve pa so večinoma opravile preko zunanjih dobaviteljev. Pri vseh treh omenjenih skupinah storitev je več kot 70 % poslovnih subjektov navedlo, da so te storitve opravili zanje v glavnem zunanji dobavitelji. Več kot 70 % poslovnih subjektov, ki so za poizvedovanje in varovanje ter računovodstvo in knjigovodstvo najeli zunanjega dobavitelja, je za te storitve s temi dobavitelji podpisalo dolgoročno pogodbo. Kar več kot 84 % poslovnih subjektov, ki so pri oglaševanju ter projektiranju in tehničnem svetovanju v glavnem uporabili storitve zunanjih dobaviteljev, pa s temi dobavitelji bodisi ni sklenilo pogodbe bodisi je sklenilo le kratkoročno pogodbo.

Za tisti del posameznih skupin storitev, ki so jih v letu 2004 za poslovne subjekte opravili v glavnem zunanji izvajalci, je več kot 96 % poslovnih subjektov navedlo, da so svoje dobavitelje poiskali v Sloveniji, in več kot 70 % poslovnih subjektov je navedlo, da so svoje dobavitelje našli celo v svoji regiji. Izjema so bile storitve raziskovanja trga, za katere je 10 % poslovnih subjektov navedlo, da so jih nabavili v državah EU (5,8 %) oziroma so navedli drugo (4,2 %).

Najpogostejše ovire, ki so jih v letu 2004 opazili poslovni subjekti, kadar so se odločali o nakupu storitev zunaj naše države, so bile ovire, povezane z lokacijo. Te so bile najpomembnejše pri storitvah čiščenja objektov in opreme, poizvedovanja in varovanja ter prometa, skladiščenja, zvez in poštinih storitev. Kot najmanj pomembne ovire so poslovni subjekti pri večini skupin storitev navedli jezikovne ovire. Visoka cena storitev tujih dobaviteljev je bila največkrat navedena ovira pri storitvah raziskovanja trga in oglaševanja.

46,6 % oziroma 48,6 % poslovnih subjektov je v letu 2004 pričakovalo, da bodo v naslednjih dveh letih za raziskovanje trga oziroma oglaševanje namenili več sredstev za nakup storitev pri zunanjih dobaviteljih kot v letu 2004. Storitve računovodstva in knjigovodstva, čiščenja objektov in opreme ter poizvedovanja in varovanja pa bodo verjetno ostale na enaki ravni, saj je za posamezno skupino teh storitev tako leta 2004 trdilo okoli 70 % poslovnih subjektov.

V Izkazu poslovnega izida in s tem neposredno v stroških za nakup storitev se je v letu 2003 vrednotilo 97,1 % vseh nakupov storitev; investicije, povezane s storitvami, ki so prikazane v Bilanci stanja v tem letu, pa so predstavljale samo 2,9 % vseh nakupov storitev. Investicije v IKT in investicije za raziskovanje in razvoj so v letu 2003 skupaj predstavljale skoraj tri četrtine vseh investicij, povezanih s storitvami.

When comparing the shares of purchases of services by several economic activities, the costs of purchases of services represented about 75% of total purchases in economic activities I (transport, storage and communication) and O (other community, social and personal services), while in economic activities G (wholesale and retail, repair motor vehicles, personal and household goods) and D (manufacturing) they amounted to less than 20% of total purchases in 2003.

In 2004 accounting and book-keeping services were performed in larger part (62.2%) by enterprises themselves, while insurance services, transport, logistics and postal services and legal services were mostly performed by external service providers. For all three mentioned groups of services, more than 70% of business entities stated that these services were done by external service providers. For investigation and security services and for accounting and book-keeping services more than 70% of business entities that purchased these services from external providers signed a long-term contract with them. For advertising and architectural, engineering and related technical consultancy more than 84% of business entities that purchased services from external providers did not have any contract with them or they did have a contract with the duration of max. one year.

When a group of services was mainly provided by an external provider, in 2004 more than 96% of business entities found their service provider in Slovenia and more than 70% of business entities found their provider even in their local regions. The exception were market research services for which 10% of business entities stated that they purchased services in the EU Member States (5.8 %) or they stated other (4.2%).

Barriers related to location were the most frequent barriers related to purchase of services in other countries in 2004. This especially holds true for industrial cleaning services, investigation and security services and transport, logistics and postal services. The least important barriers for most types of services were language barriers. High price of services was the main reason for not buying advertising and market research services from foreign providers.

In 2004, 46.6% or 48.6% of business entities intended to increase their budget (purchase of services from external providers) for market research services or advertising over the next two years. Accounting and book-keeping, industrial cleaning services and investigation and security services will probably remain at the current level, as in 2004 for each service group about 70% of business entities stated so.

In the profit and loss account and consequently directly in the costs of services 97.1% of all purchases of services were assessed in 2003. Service-related investments recorded in the balance sheet represented only 2.9% of total purchases of services in 2003. ICT investments and research and development investments together represented almost three quarters of all service-related investments in 2003.

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