

VALUE ADDED, EMPLOYMENT, REMUNERATION AND LABOUR PRODUCTIVITY IN THE CANDIDATE COUNTRIES

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Increased activity in the enlargement process has led to the European Commission taking a considerable interest in the national accounts statistics of the Candidate Countries (CCs). A wider variety of harmonised statistics are being requested by those engaged in making the regular assessments of these countries and also by the governments and private bodies of the Member States. Until now, the quarterly and annual publications of "Statistics in Focus" have primarily focused on the growth rates and components of GDP. Over the last few years, the availability of other national accounts indicators on Candidate Countries has improved, making it possible to increase the scope of these publications.

This publication provides an analysis of the production activity of the Candidate Countries via **employment, gross value added (GVA), remuneration and labour productivity** indicators and is for the most part comparable with the corresponding publication on the Member States showing these indicators by the six main branches of production.

For the purposes of this publication, remuneration is defined as the 'compensation of employees' per employee. Labour productivity is calculated by dividing GVA at basic prices by the number of persons employed, including the self-employed.

Summary

The economy of the Candidate Countries group is more heavily weighted towards *agriculture*, and less towards *services*, than that of the EU according to Table 1.

This is most apparent in the number of employees (29% in *agriculture*), but low *agricultural* productivity means that the extra labour is not reflected in the GVA, with only 11% of the total coming from this branch. On the other hand, 42% of employees work in *service* branches in the CCs, but these branches are more productive, contributing 56% of the total GVA.

Remuneration is, on the whole, substantially lower in the CCs than in the Member States, but there are large differences between the highest and lowest Candidate Countries.

Note: the following country codes are employed for the CCs: Bulgaria (BG), Cyprus (CY), Czech Republic (CZ), Estonia (EE), Hungary (HU), Latvia (LV), Lithuania (LT), Malta (MT), Poland (PL), Romania (RO), Slovak Republic (SK), Slovenia (SI), Turkey (TR); and for the EU Member States: Belgium (B), Denmark (DK), Germany (D), Greece (EL), Spain (E), France (F), Ireland (IRL), Italy (I), Luxembourg (L), Netherlands (NL), Austria (A), Portugal, (P) Finland (FIN), Sweden (S), United Kingdom (UK).

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Tab. 1. Structure of gross value added, employment and compensation of employees of Candidate Countries and EU, 1998 (as a % of total economy)

	Agriculture		Manufacturing		Construction		Services							
	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15	Trade, transport, comms.		Financial, business services		Public services		Total services	
	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15	CC-13	EU-15
GVA	10.6	2.6	26.5	23.8	6.7	5.4	28.1	21.1	12.9	25.9	15.1	21.1	56.1	68.1
Empl.	29.3	4.8	22.9	20.3	6.0	6.8	20.0	26.9	4.9	14.3	16.9	27.0	41.8	68.1
Comp.	3.5	1.0	29.6	25.6	7.7	5.9	19.9	20.9	9.5	13.2	29.8	33.4	59.2	67.5

Labour productivity (see table 6) levels are also starkly different between the CCs and the EU, with the EU economy, as a whole, being 2½ times more productive than the CC group. In the *agriculture* branch, the difference is even greater, with the CCs more than 3 times less productive than the EU. Slovenia has the most productive economy of the CCs (where data are available), even higher than Portugal, the least-productive Member State.

It should be noted that some of the differences in employment and productivity between countries can be explained by the varying composition of the workforce (full-time versus part-time employment). Availability of data, however, does not permit the use of full-time equivalents or hours worked instead of persons employed.

GVA growth almost twice as high in CCs as in EU

Table 2 shows the **growth index** of GVA, comparing the change between 1995 and 1998. Total GVA grew by 13% in the CCs, compared to 7% in the EU.

Of the six branches, *trade, transports and communications* displayed the highest growth for the CCs, increasing by 18%, with *manufacturing* close behind and growing by 16%. In the EU, the branch showing greatest GVA growth was *financial and business services* with a more modest 11%.

None of the branches in the total CC-13 figure exhibited decreasing GVA; the lowest being *public services* with growth of 4%.

Tab. 2. Growth index of gross value added at constant prices and employment, 1998 (1995=100)

	Agriculture		Manufacturing		Construction		Trade, transport, comms.		Financial, business services		Public services		Total economy	
	GVA	EMPL	GVA	EMPL	GVA	EMPL	GVA	EMPL	GVA	EMPL	GVA	EMPL	GVA	EMPL
BG	:	:	:	:	:	:	:	:	:	:	:	:	84	:
CY	92	:	103	:	96	:	112	:	117	:	114	:	109	:
CZ	109	85	117	98	63	89	105	99	107	102	77	99	102	97
EE	102	84	122	88	154	132	128	98	123	121	104	100	120	98
HU	102	94	124	105	106	106	114	100	105	115	106	94	112	101
LV	93	95	121	90	133	112	126	107	108	97	111	101	117	100
LT	121	91	118	95	129	103	119	112	110	108	113	104	118	101
MT	:	:	:	:	:	:	:	:	:	:	:	:	:	102
PL	109	103	124	99	128	114	121	115	106	133	107	106	117	107
RO	85	103	77	85	80	82	94	90	82	81	74	95	90	93
SK	102	92	108	102	93	111	128	110	107	91	137	101	115	102
SI	101	87	112	90	128	110	110	101	111	107	114	109	112	99
TR	112	92	120	113	111	108	123	112	111	112	109	110	118	102
CC-13 ⁽¹⁾	108	96	116	99	106	104	118	107	106	111	104	104	113	101
EU-15	108	96	107	100	99	100	108	103	111	103	103	103	107	103

⁽¹⁾ For both GVA and employment, CC-13 totals are calculated without Bulgaria, Cyprus and Malta.

Estonia's total GVA growth was the highest of the CCs, at 20%, followed by Turkey, the other Baltic states of Latvia and Lithuania, and Poland. Far behind the rest of the group were Bulgaria (-16%) and Romania (-10%).

In *Trade, transport and communication* (the branch which commands the greatest share of total CC GVA), Estonia and the Slovak Republic achieved the highest growth, each with 28%. Romania fared poorest in this category, with GVA falling by 6% over the period. In the second largest category — *manufacturing* — Hungary and Poland topped the group with 24%, closely followed by Estonia and Latvia. The most outstanding growth in any branch or country was Estonia's increase in *construction* GVA of 54%, though from a low level.

Gross value added: EU economies more dominated by services than CCs

In terms of the **structure** of GVA by branch (table 3), the EU-15 and CC-13 groups have clearly different characteristics. The *agricultural* share is about four times higher in the CCs than in the EU (10.6% to 2.6%) and likewise, the shares accounted for by *financial and business services* are also very different (12.9% and 25.9%, respectively). The EU is clearly more dominated by the *services* branches. Interestingly, this also holds true for the narrower *public services* branch.

In terms of individual CCs, *agriculture* shares vary from 2.7% in Malta to 21.1% in Bulgaria. Turkey, Romania and Lithuania all record shares above 10%, while the other CCs are well below this level.

Tab. 3. Structure of gross value added and employment, 1998 (as a % of total economy)

	Agriculture		Manufacturing		Construction		Services							
							Trade, transport, comms.		Financial, business services		Public services		Total services	
							GVA	EMPL	GVA	EMPL	GVA	EMPL	GVA	EMPL
BG	21.1	26.2	24.9	26.5	3.7	4.1	17.9	20.4	20.3	4.5	12.0	18.3	50.2	43.2
CY	4.4	:	13.8	:	8.1	:	30.9	:	20.0	:	22.8	:	73.8	:
CZ	4.6	5.5	35.3	32.8	8.0	8.2	23.1	25.4	15.7	9.9	13.3	18.3	52.1	53.6
EE	6.3	9.1	21.2	25.9	6.4	7.3	31.5	25.5	15.0	7.4	19.5	24.7	66.0	57.7
HU	5.5	7.5	28.2	28.0	4.6	6.2	23.4	24.2	19.0	6.6	19.3	27.4	61.7	58.3
LV	4.3	17.6	23.4	18.4	6.9	6.1	34.7	26.9	11.3	6.0	19.4	24.9	65.4	57.9
LT	10.3	21.5	23.9	20.0	8.6	7.1	27.4	22.0	10.0	3.7	20.0	25.6	57.3	51.4
MT	2.7	:	25.0	:	2.8	:	22.9	:	19.4	:	27.3	:	69.5	:
PL	4.8	25.2	27.6	23.4	8.7	6.1	28.2	21.1	13.3	6.9	17.5	17.3	59.0	45.3
RO	16.1	38.1	30.4	26.3	5.9	4.4	24.9	15.8	14.7	3.6	7.9	11.8	47.6	31.2
SK	4.6	8.3	28.1	30.1	7.1	9.3	26.0	22.5	17.8	5.2	16.4	24.6	60.2	52.3
SI	4.1	5.6	32.0	33.6	5.6	6.9	22.5	24.2	15.9	8.3	19.9	21.3	58.3	53.9
TR	17.4	43.0	22.1	16.7	5.8	6.0	32.1	17.8	9.1	2.4	13.5	14.2	54.8	34.3
CC-13 ⁽¹⁾	10.6	29.3	26.5	22.9	6.7	6.0	28.1	20.0	12.9	4.9	15.1	16.9	56.1	41.8
EU-15	2.6	4.8	23.8	20.3	5.4	6.8	21.1	26.9	25.9	14.3	21.1	27.0	68.1	68.1

⁽¹⁾ For both GVA and employment, CC-13 totals are calculated without Cyprus and Malta..

The share of *trade, transport and communication* in the total economy varies from 17.9% in Bulgaria to 34.7% in Latvia.

Financial and business services employment soaring in CCs

According to table 2, the total level of employment in the total CC economy increased by just 1% during the period between 1995 and 1998. Growth in the EU was slightly higher, at 3%.

Whilst employment in the *services* branches is low in the CCs, compared to the EU, this position is changing, with the highest growth in CC employment being recorded in *financial and business services*, at a rate of 11%. The highest growth rate in the EU was a modest 3% (in all three service branches). Conversely, *agricultural* employment dropped by 4% in both the CCs and the EU.

Looking at specific CCs in *agriculture*, the largest branch for the CCs, only two countries, Poland and

Romania, saw employment grow between 1995 and 1998, at a rate of 3%. These two countries account for nearly 40% of the total employment of the CC group. Estonia experienced the largest fall in its *agricultural* labour force (-16%), closely followed by the Czech Republic (-15%). The employment change in *manufacturing* varies from -15% in Romania to +13% in Turkey.

Agricultural share of employment much higher than share of GVA in CCs

In terms of the **structure** of employment in the total economy (Table 3), the main differences between the CC and EU, as for GVA, lie in the *agricultural* share. In the EU, *agriculture* has a much smaller share (4.8% of total economy) than in the CCs (29.3%). This imbalance is reflected in the *financial and business services* branch, which holds a 14.3% share in the EU and 4.9% in the Candidate Countries.

In individual CCs, the variation of shares was highest in *agriculture*, varying from 5.5% in the Czech Republic to 43.0% in Turkey (Romania was also high at 38.1%).

Financial and business services also displayed significant variation across the CCs, ranging from 2.4% in Turkey to 9.9% in the Czech Republic.

Remuneration substantially lower in CCs compared to EU

Table 4 shows remuneration for the CCs by branch, expressed as a percentage of the corresponding EU-15 figure. Calculations were made using values in Purchasing Power Standards to exclude the effect of price level differences between countries. Employees in the Candidate Countries as a group (where data are available) receive only 42% of the EU-average. *Agricultural* employees in the CCs earn slightly more in comparison, at 63% of the EU *agricultural* average, with *manufacturing* employees receiving 34% of the EU branch average.

Of all the CCs for whom data are available, Slovenia's employees are remunerated the highest, at a rate of 70% of the EU average. In *agriculture*, Slovenians receive an amount representing 121% of the EU average. At the other end of the scale, Bulgaria's remuneration is clearly the lowest at just 24% of the EU average.

Tab. 4. Remuneration in 1998 (EU-15=100)

	Agriculture	Manufacturing	Construction	Trade, transport, comms.	Financial, business services	Public services	Total economy
PPS							
EU-15	15 400	33 400	26 800	25 300	32 200	28 700	29 100
EU-15=100							
BG	36	21	27	28	30	23	24
CY	:	:	:	:	:	:	:
CZ	81	46	74	86	77	55	60
EE	47	26	32	38	51	31	33
HU	75	41	43	59	90	46	50
LV	36	26	30	31	35	26	27
LT	32	24	39	29	36	29	28
MT	:	:	:	:	:	:	:
PL	64	38	47	44	48	50	44
RO	:	:	:	:	:	:	:
SK	56	32	40	52	87	33	40
SI	121	56	61	73	75	86	70
TR	67	24	32	39	55	52	38
CC-13⁽¹⁾	63	34	41	47	58	47	42

⁽¹⁾ CC-13 totals are calculated without Cyprus, Malta and Romania.

Table 5 shows growth in remuneration between 1995 and 1998, though data availability is low, especially by branch. In broad terms, for the whole economy, Lithuania has seen the steepest increase in remuneration, with 28%. *Agriculture* and *Public Services*

were primarily responsible for this, with growth rates of 45% and 49% respectively. At the other extreme, the Czech Republic saw overall remuneration fall by 6% over the same period - *construction* and *trade, transport and communications* showing the greatest branch falls.

Tab. 5 Growth index of remuneration (constant prices), 1998 (1995=100)

	Agriculture	Manufacturing	Construction	Trade, transport, comms.	Financial, business services	Public services	Total economy
BG	:	:	:	:	:	:	:
CY	:	:	:	:	:	:	:
CZ	94	99	83	80	91	99	94
EE	107	109	91	116	114	112	112
HU	:	:	:	:	:	:	102
LV	:	:	:	:	:	:	116
LT	145	114	114	115	109	149	128
MT	:	:	:	:	:	:	109
PL	85	121	142	118	122	113	119
RO	:	:	:	:	:	:	:
SK	119	106	127	139	166	95	117
SI	98	106	106	103	102	103	105
TR	114	107	102	137	142	127	120

Labour productivity significantly higher in EU than CCs

In this publication, labour productivity is **gross value added at basic prices in PPS** divided by **employment**. Table 6 shows a comparison of the levels of labour productivity in the CCs and EU Member States, where EU-15 = 100.

The most eye-catching figure is the labour productivity for the total economy of the CCs which is substantially lower than that of the EU-15, at 41%. Slovenia is the most productive of the CCs, with a figure amounting to 71% of the EU-15 average. This figure surpasses the least productive Member State, Portugal, and very nearly reaches that of Greece. At the other end of the scale, Bulgaria, Latvia, Lithuania and Romania all have rates of labour productivity less than one-third of the EU-15 average.

For the CCs, it is the *agricultural* branch where labour productivity fares poorest in comparison with the EU, at just 28% of the EU-15 average, but this is at least partly explained by the high production subsidies awarded to Member States in the EU. In the *trade, transport and communications* branch, the CCs come closest to the EU average, with 69%.

Variation in labour productivity amongst the CCs is highest in *agriculture* (also being the branch with the largest share of employment), ranging from 12% of the EU average in Latvia to 94% in Slovenia. Poland also has very low labour productivity in *agriculture* (13% of EU-15). In the *trade, transport and communications* branch, which contributes the largest share of GVA in the CCs, Bulgaria has the lowest labour productivity (27% of EU-15) with Turkey recording a high 94%.

Tab. 6. Labour productivity in 1998 (EU-15=100)

Minimums of Member States and maximums of Candidate Countries highlighted

	Agriculture	Manufacturing	Construction	Trade, transport, comms.	Financial, business services	Public services	Total economy
PPS							
EU-15	22 900	48 800	32 800	34 500	69 400	32 200	41 500
EU-15=100							
B	171	155	153	143	144	112	137
DK	164	94	99	104	117	91	97
D	103	107	107	102	162	106	116
EL	63	55	105	88	130	77	72
E	112	94	96	113	114	91	95
F	146	120	105	114	122	102	113
IRL	:	:	:	:	:	:	114
I	106	87	102	119	118	83	98
L	106	145	108	135	161	154	153
NL	158	132	107	115	81	95	104
A	:	115	141	117	140	122	107
P	54	50	52	61	76	65	55
FIN	122	123	90	116	127	87	105
S	143	106	92	99	112	70	91
UK	:	:	:	:	:	:	99
BG	37	20	29	27	69	21	25
CY	:	:	:	:	:	:	:
CZ	88	53	72	63	54	54	58
EE	46	26	41	55	44	38	37
HU	77	49	54	67	99	52	58
LV	12	29	39	42	31	27	27
LT	26	30	45	45	47	30	30
MT	:	:	:	:	:	:	:
PL	13	38	68	61	43	49	38
RO	24	31	53	60	77	28	32
SK	54	42	51	73	107	45	53
SI	94	58	72	80	82	86	71
TR	32	49	54	94	101	54	44
CC-13⁽¹⁾	28	41	58	69	66	47	41
CC_{max} minus EU_{min}	40	8	20	33	31	21	17

⁽¹⁾ For both GVA and employment, CC-13 totals are calculated without Cyprus and Malta.

Table 7 and Figure 1 illustrate growth in labour productivity between 1995 and 1998. The CCs recorded growth of 10% over this time period, outstripping the 4% achieved by the EU-15. Growth in the individual

branches ranges from -5% in financial and business services to +13% in manufacturing. The CCs grew fastest above the EU in *manufacturing*, but only by a relatively modest 6 percentage points.

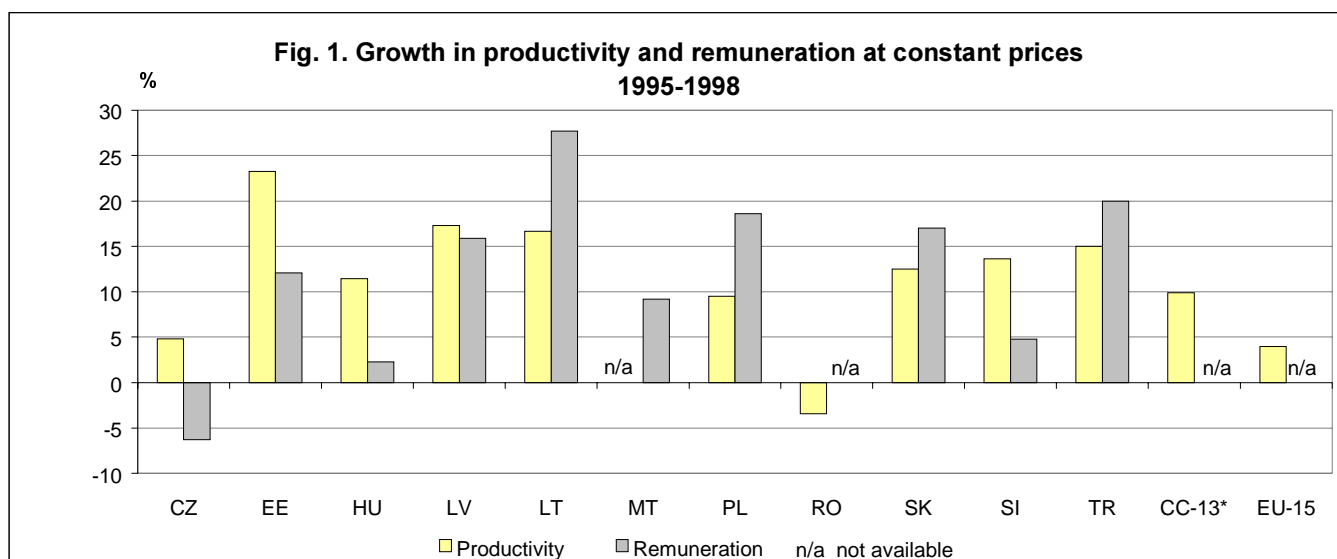
Tab. 7. Growth index of productivity at constant prices, 1998 (1995=100)

	Agriculture	Manufacturing	Construction	Trade, transport, comms.	Financial, business services	Public services	Total economy
BG	:	:	:	:	:	:	:
CY	:	:	:	:	:	:	:
CZ	128	119	71	106	105	77	105
EE	121	138	117	131	102	104	123
HU	108	118	100	114	91	112	111
LV	98	135	119	117	111	109	117
LT	133	124	125	106	101	108	117
MT	:	:	:	:	:	:	:
PL	106	126	112	105	79	100	109
RO	83	90	98	105	101	77	97
SK	111	106	84	116	117	136	112
SI	117	124	116	109	104	105	114
TR	121	106	103	110	100	99	115
CC-13 ⁽¹⁾	111	113	99	109	95	98	110
EU-15	112	107	98	107	100	101	104

⁽¹⁾ CC-13 totals are calculated without Bulgaria, Cyprus and Malta.

Of all the Candidate Countries, Estonia displayed by far the highest growth in labour productivity, with a leap of 23%, between 1995 and 1998. This was followed by the two other Baltic states, Latvia and Lithuania, each recording growth rates of 17%. However, all three have

grown from low levels, even compared to other CCs, in 1995. Romania is the only country for whom labour productivity decreased between 1995 and 1998, mainly due to the *agricultural, manufacturing and public services* branches.



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