

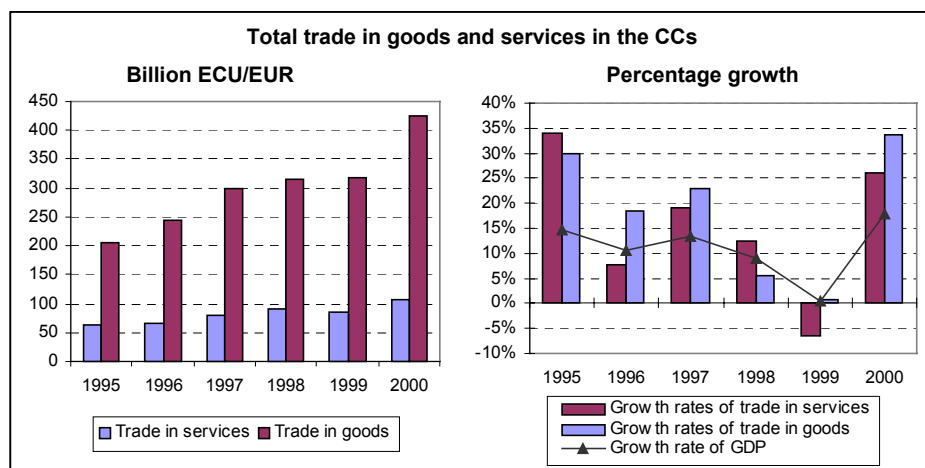
International Services Transactions of Candidate Countries

Stelios Pantazidis

From 1995 to 2000, services transactions played an increasingly important role in the total external transactions of the Candidate Countries (CCs)¹, with almost all of them showing surpluses in their services account. However, this increase did not alter their share in the world exports of services, which remained fairly stable over the period. Nonetheless, most CCs had a high degree of outward orientation. Although Turkey, Poland, the Czech Republic and Hungary exhibited a relatively moderate openness to international trade, they accounted for 72% of the group's total trade in services, a large amount of which was traded with the European Union.

Travel and transportation services were the most important components of the services account in the Candidate Countries, seemingly giving them a comparative advantage in these two services categories.

Steady growth of trade in services in the Candidate Countries: from ECU 65.3 bn in 1995 to EUR 105.9 bn in 2000²



From 1995 to 2000, the CCs' trade in both goods and services displayed an upward trend. However, on average, trade in services grew at a lower rate than trade in goods. While the value of trade in goods doubled over the period, trade in services rose to EUR 105.9 bn in 2000, meaning a 70% growth over 1995. In the wake of generally falling GDP growth rates in the CCs, the growth of trade in services slowed from 1997 to 1999 but rebounded in 2000 (+26% compared to -7% in 1999). As a result, services accounted for 23% of their total trade in 1995 and edged down to 20% by 2000 (with a share varying from 14% in Romania and the Slovak Republic to 49% in Cyprus). The share of services transactions in the total trade of the EU-15 (intra and extra-EU-15 trade being included) stood at 21%, ranging from 16% in Finland to 43% in Greece.

Apart from 1999, the growth rates of trade in goods and services were higher in the CCs than in EU-15 countries and the world, as a whole, indicating an increasing integration of the Candidate Countries in the international economy.

Performance differed widely on a country-by-country basis

The Baltic Countries (Estonia, Latvia, and Lithuania) exhibited an impressive upsurge in total trade in services, mainly due to the expansion of transportation transactions. Turkey, Hungary and Romania followed, with growth rates exceeding 60%, while the Czech Republic, the Slovak Republic and Slovenia showed a relatively lower cumulative increase in services transactions over the same period (less than 50%). The remaining Candidate Countries' trade in services expanded, with rates ranging from 51% to 57%.

¹ The group of Candidate Countries consists of BG=Bulgaria, CY=Cyprus, CZ=Czech Republic, EE=Estonia, HU=Hungary, LT=Lithuania, LV=Latvia, MT=Malta, PL=Poland, RO=Romania, SL=Slovenia, SK=Slovakia, TR=Turkey.

² When referring to trade in goods and/or in services, we refer to the sum of exports and imports.

Statistics in focus

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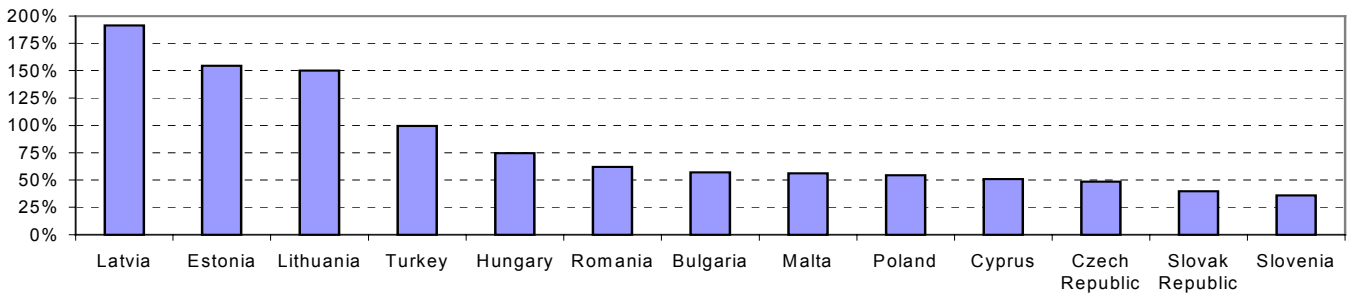
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Growth of total trade in services in the individual CCs (2000 over 1995)



From 1995 to 2000, the Candidate Countries experienced a sustained surplus in the services account

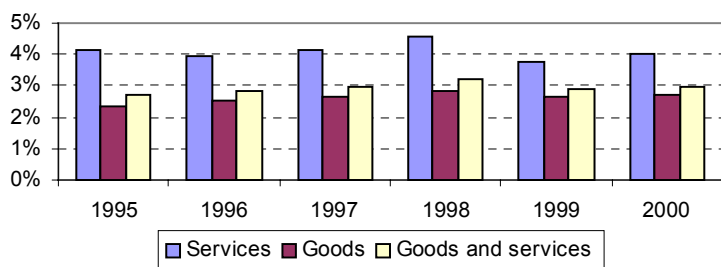
The expansion of trade in services was accompanied by a positive balance in services, which – although fluctuating – rose by 43% in 2000, over 1995. This surplus of services account varied between ECU 14.3 bn (in 1996 and 1999) and EUR 22.3 bn (in 2000). In comparison, the EU-15 as a whole, whose services balance also remained positive throughout the period, recorded surpluses ranging between ECU 5.6 bn in 1995 and ECU 18.9 bn in 1997. Nevertheless, this surplus only partly offset the deficit in goods, which continuously increased (1999 being the only year in which the deficit decreased) and almost tripled within 5 years. This large and widening deficit of the goods balance led to a continuous deterioration of the combined goods and services balance. Thus, the CCs' overall deficit in goods and services more than quintupled over the period.

CCs net trade of goods and services
Billion ECU/EUR



From 4.2% in 1995 to 4.0% in 2000: a stable position for the Candidate Countries in world services exports

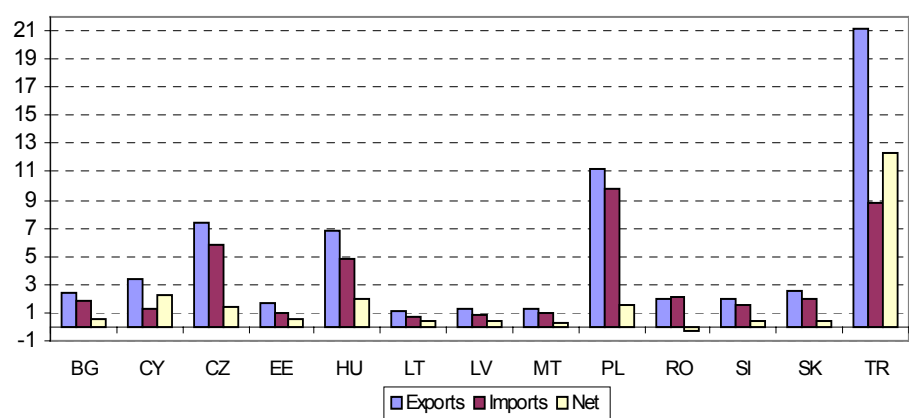
CCs' share in total world exports of goods and services



In 2000, total world exports of services amounted to EUR 1 598 bn, with the EU accounting for 42% of the total (EUR 666 bn, including EU-15 intra flows). The CCs maintained their share in world services exports over the period. Indeed, the services exports of all Candidate Countries represented 4.0% of the world total, compared to 4.2% in 1995, totalling EUR 64 bn. At the same time, only 2.7% of world exports of goods came from the Candidate Countries. Thus, as is shown in the graph, as compared to the international goods market, the CCs held a better position in the world services market.

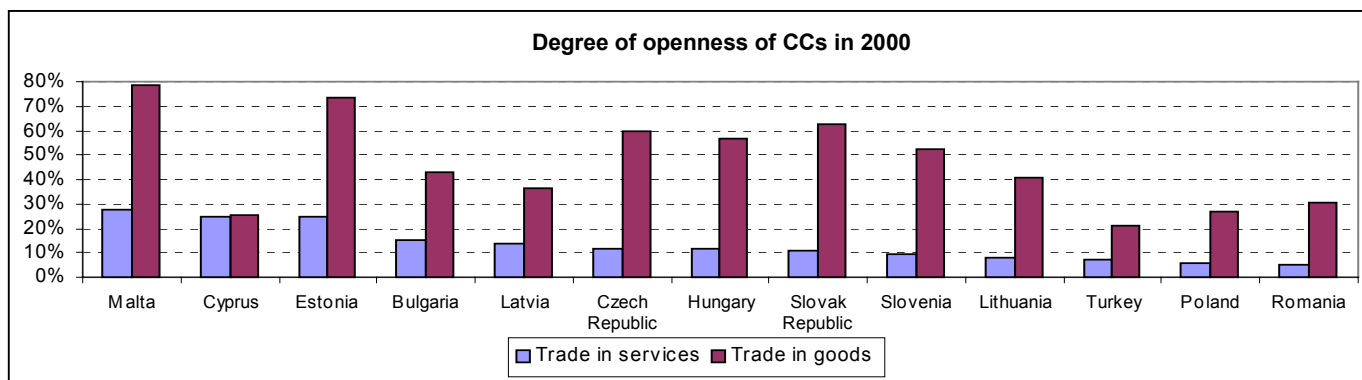
Trade in services of Turkey, Poland, the Czech Republic and Hungary represented 72% of the Candidate Countries' total

CCs trade in services in 2000 (Billion EUR)



The share of individual countries in the total trade in services of the group varied according to the size of their economies and remained practically unchanged between 1995 and 2000. Four countries (Turkey, Poland, the Czech Republic and Hungary) accounted for 72% of total services transactions of the group. These four countries exported 73% of total services exports of the group and imported 70% of total imports. Turkey exported a third of the Candidate Countries' total exports while receiving 21% of imports. At the other end of the scale, Latvia, Lithuania, and Malta exported and imported 2% of the group's total exports and imports.

The Candidate Countries' degree of openness: 8% on average for trade in services in 2000



Small economies tend to be more open to international trade than larger countries, a fact that is confirmed by the data for the Candidate Countries. In the graph above, the individual countries have been ranked in decreasing order of their degree of openness to trade in services. As is shown, the ratio varied from 5% in Romania to 28% in Malta, averaging 8% for the whole group of CCs.

The small economies of Malta (28%), Cyprus (25%) and Estonia (24%) were also the most open to international trade, whereas Turkey (7%), Poland (6%) and Romania (5%), the relatively largest countries of the sample, displayed a low openness ratio.

As far as both trade in goods and services are concerned, Malta showed the highest openness ratio. On the contrary, Turkey was the least open to trade in goods, and among the least open to trade in services.

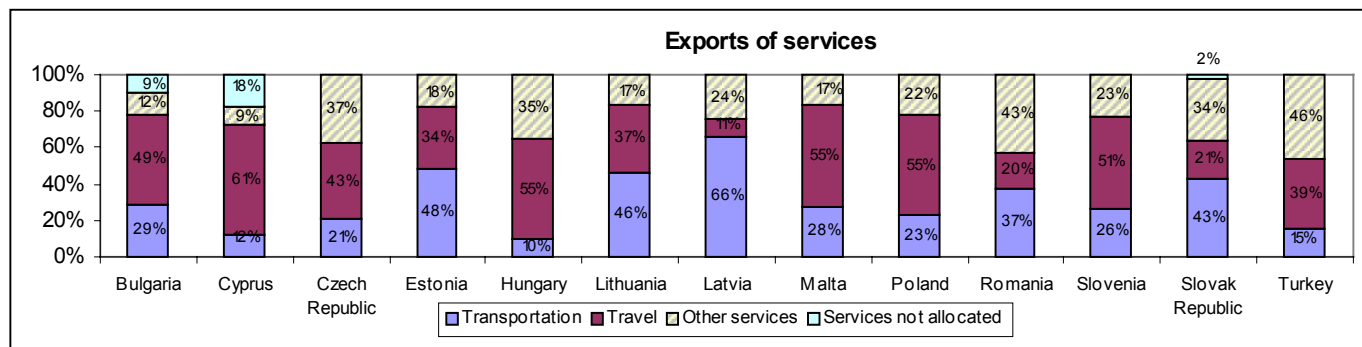
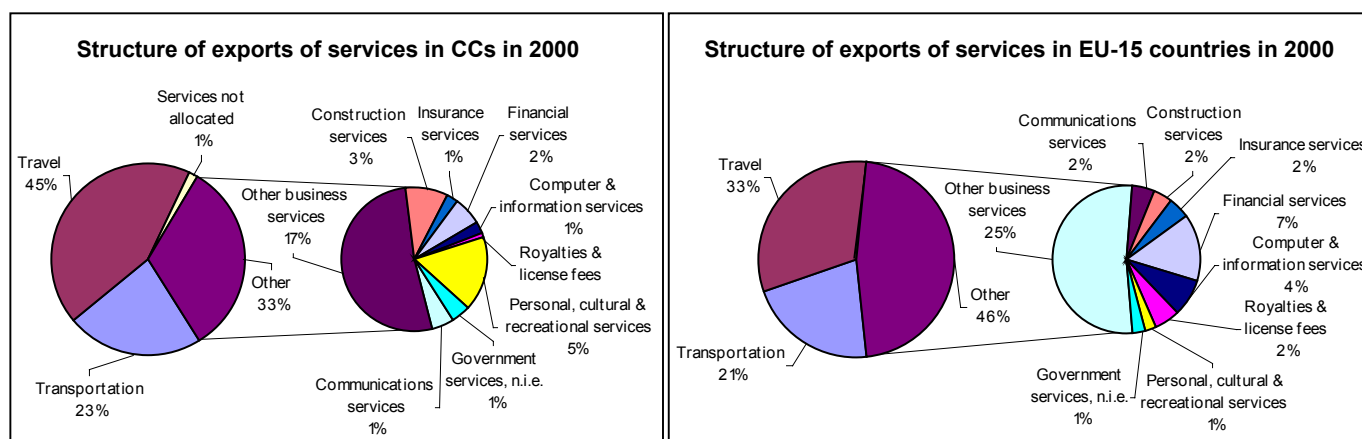
Travel and transportation play a major role in exports and imports of services

The structure of exports of services reveals the specialisation of the Candidate Countries in *travel* and *transportation*, which accounted for 68% of total services exports in 2000. However, this average share masks significant disparities between countries, especially concerning the breakdown between *travel* and *transportation*.

Nonetheless, none of the countries had a share inferior to Turkey's 54% for both services. The highest shares were those of Lithuania and Malta where *travel* and *transportation* represented 83% of total services exports. *Travel* was the main component of the export side of services account in Cyprus (61%), Malta (55%), Poland (55%), Hungary (55%) and Slovenia (51%). In Latvia, *transportation* represented 66% of services exports.

The component *other services* outstripped *travel* and *transportation* in two countries: Turkey (46%) and Romania (43%).

Structure of exports of services in the Candidate Countries and in the EU-15 Countries in 2000

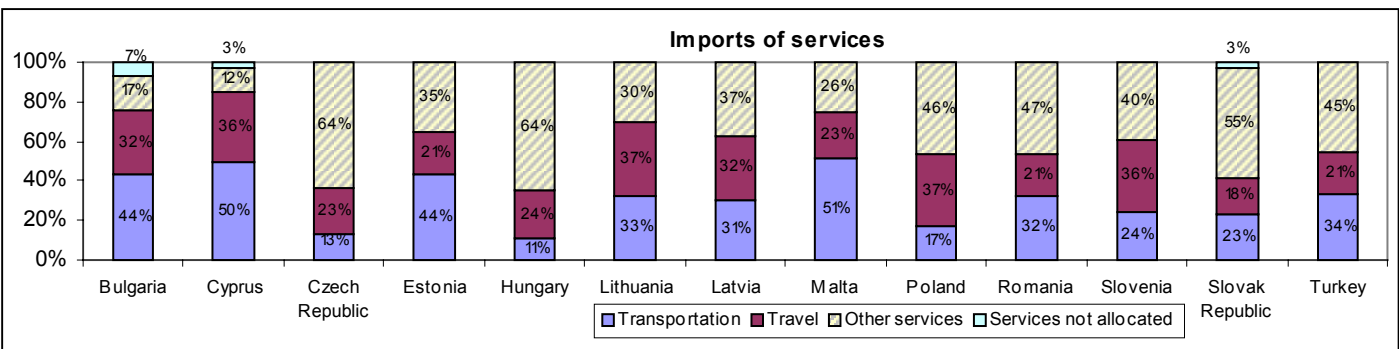
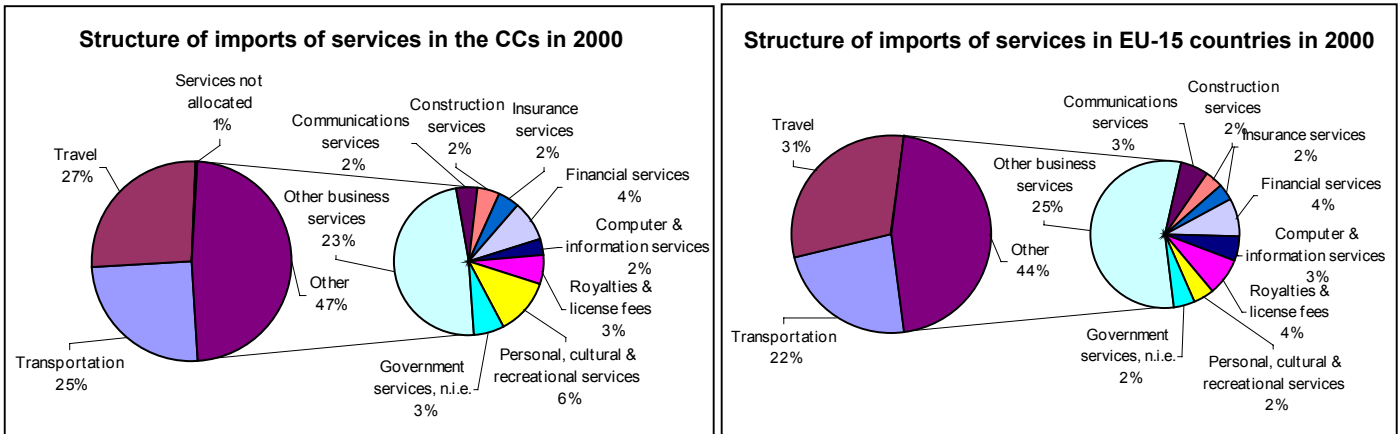


The structure of services imports reveals a similar pattern pointing possibly to increased intra-industry trade. In the whole group, 52% of imports of services were accounted for by *travel* and *transportation* services. *Other services* totalled 47% of services imports, of which 23% for *other business services*.

As was the case for exports of services, the differences between countries varied widely. For example, the imports of *travel* and *transportation* services of the Czech Republic and Hungary, amounted to 36% of the total services imported, whereas in the case of Cyprus, the share of these two items in services imports stood at 85%.

Other services (of which the most important component was *other business services*) represented higher shares of imports than exports of services, reaching 64% in the Czech Republic and Hungary, 55% in the Slovak Republic, 47% in Romania, 46% in Poland, 45% in Turkey and 40% in Slovenia.

Structure of imports of services in the Candidate Countries and in the EU-15 countries in 2000



Note: Data on exports and imports of services in EU-15 countries are presented for intra-EU-15 trade.

For both exports and imports of services, the comparison between EU-15 countries and the CCs reveals that both areas had quite a similar trade pattern.

A persistent Revealed Comparative Advantage in travel and transportation

The Revealed Comparative Advantage (RCA) index confirms the Candidate Countries' specialisation in *travel* and *transportation*.

The Revealed Comparative Advantage (RCA) index says whether a country concentrates its exports more on a particular sector (or product) compared to the rest of the world, and takes such a concentration as evidence of comparative advantage. It is calculated as the share of a country in the world trade of a specific product, divided by its share of the world's total merchandise trade.

Values above 1 indicate that the country has a comparative advantage, whereas the opposite holds for values below 1.

If a country has an RCA above 1 which turns into an RCA of less than 1, it means that it has lost its comparative advantage in the related industry and is developing a relative disadvantage with respect to that industry. If the opposite happens, the country is specialising in that industry and switching to a relative comparative advantage.

An RCA of less than 1 could result not from a weakness in services, but rather from an increasingly stronger manufacturing sector*.

*Source: Stefano Chiarlano, (2001), "Country Specialisation and Trade Overlap: Who Are the East European Countries Competing With? (UNCTAD).

	1995			2000		
	Transportation	Travel	Other services	Transportation	Travel	Other services
Bulgaria	1.10	1.47	:	1.27	1.57	0.28
Cyprus	0.53	1.88	0.25	0.54	1.93	0.22
Czech Republic	0.89	1.34	0.90	0.90	1.35	0.87
Estonia	1.75	1.27	0.43	2.10	1.07	0.43
Hungary	0.35	1.60	:	0.45	1.74	0.83
Lithuania	2.43	0.50	0.63	2.02	1.18	0.39
Latvia	3.76	0.09	0.14	2.86	0.34	0.56
Malta	1.02	1.98	0.31	1.22	1.76	0.40
Poland	1.17	0.68	1.27	1.02	1.74	0.52
Romania	1.29	1.24	0.74	1.61	0.65	1.01
Slovenia	1.02	1.68	0.55	1.14	1.62	0.54
Slovak Republic	1.06	0.82	1.22	1.89	0.67	0.80
Turkey	0.48	1.06	1.38	0.66	1.25	1.08
Candidate Countries	0.86	1.16	:	0.95	1.41	0.77
European Union	1.03	0.98	1.07	1.02	0.93	1.12

In both 1995 and 2000, the CCs as a whole specialised in travel services, improving their position from an RCA of 1.16 in 1995 to 1.41 in 2000. Nevertheless, the lasting specialisation of Baltic countries in *transportation* is clearly evident. Estonia enhanced its position during the period, while for Latvia and Lithuania the index has fell. To a lesser extent, Bulgaria, Malta, Poland, Romania, Slovenia and the Slovak Republic also appeared to be specialising in *transportation*, with an RCA ranging from 1.02 (Poland) to 1.89 (Slovak Republic) at the end of the period.

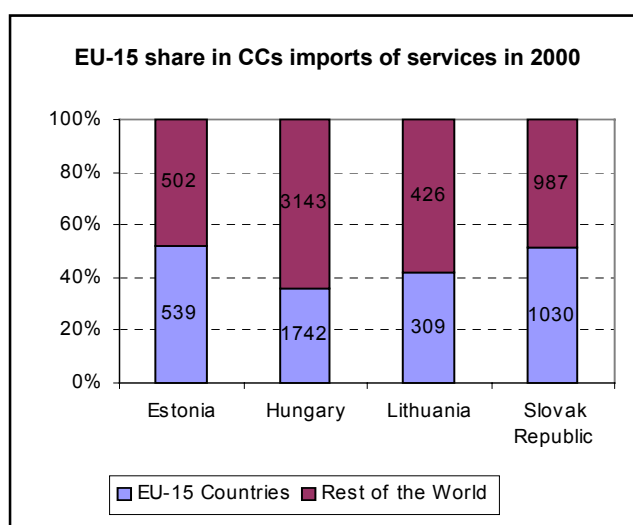
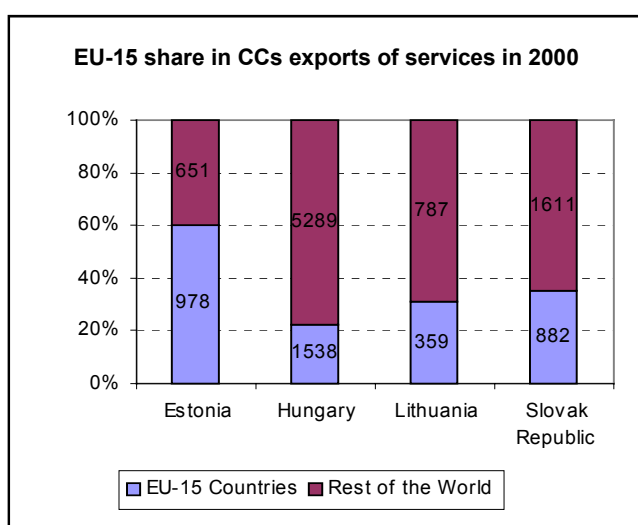
Bulgaria, Cyprus, the Czech Republic, Hungary, Lithuania, Poland and Turkey have all enhanced their position in *travel* services.

In two countries, Poland and Romania, the RCA changed between 1995 and 2000. Poland showed a significant improvement in travel services while the RCA index for transportation fell, remaining slightly above 1. On the other hand Romania which had had an RCA above 1 in both travel and transportation industries in 1995, seemed to have lost its comparative advantage in travel in 2000, but to have improved it in transportation.

With respect to *other services*, except for Poland and the Slovak Republic in 1995, Romania in 2000 and Turkey in both years, no other Candidate Country showed an RCA index above 1.

Is EU-15 a favoured partner of the Candidate Countries in the international trade of services?³

Trade in services was, to a considerable degree, geographically oriented towards the European Union. For example, in the case of Estonia, the EU-15 countries were a major partner, with 60% of the exports of the country going to, and 52% of its imports coming from, the Union. In the Slovak Republic, 51% of imports of services originated from the EU-15 countries, while on the export side, EU-15 countries received 35% of their exports. For the two remaining countries, trade in services with the EU-15 remained below 50% for both exports and imports. In Hungary, the shares were respectively 23% and 36%, and in Lithuania, 31% and 42%.



³ Due to data availability, the only countries presented here are Estonia, Hungary, Lithuania and the Slovak Republic.

A correlation between the share of services in value added and in total trade

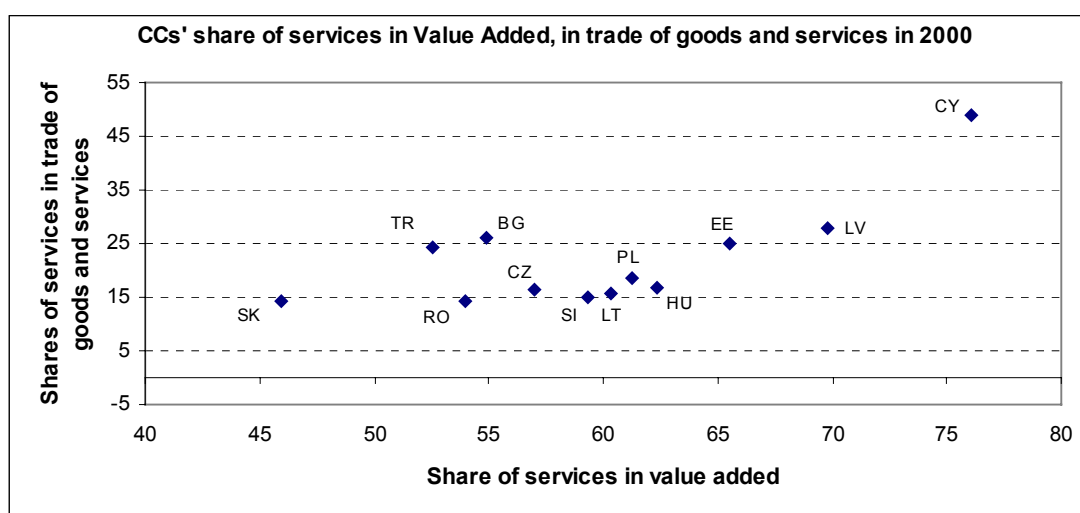
The varied pattern of trade in services between countries may be related to the stage of service industry development, represented by the share of service production in GDP.

In 2000, the share of services in total value added averaged 60% for the whole group of Candidate Countries, varying from 46% in the Slovak Republic to 76% in Cyprus. In comparison, in the EU-15 countries, the ratio of services to total value added ranged between 55% in Ireland and 80% in Luxembourg, averaging 71%.

The same year, the share of services in total trade of goods and services varied from 14% in Romania and the Slovak Republic to 49% in Cyprus, giving an average of 20% for the Candidate Countries as a whole in 2000. Meanwhile, services in the total trade of goods and services in EU-15 countries ranged from 16% in Finland to 43% in Greece, averaging 21% across the EU. As expected, a cross-section view shows a positive relation between the share of services in the domestic economy and the share of services in total external trade.

As is shown by the graph below, countries with a high services share in total Value Added tended to display high ratios of services to total external transactions (for example, Cyprus, Latvia and Estonia). Inversely, countries with relatively low services to total value added ratios also showed low percentages of services to total trade (for example, Slovakia).

It is worth noting that countries like Bulgaria, the Czech Republic, Romania and Turkey, which have similar services to total value added ratios (around 55%) had different shares of services in total external trade, a fact that might be reflecting differences in the structure of their services sector (regarding the shares of traded and non-traded services).



Note: Because of data availability, Malta is not included in this graph

Trade in services in the Candidate Countries, 1995-2000 (Billion ECU/Euro)

	1995		1996		1997		1998		1999		2000	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
Bulgaria	1.35	1.30	1.51	1.25	1.94	1.20	1.60	1.26	1.68	1.38	2.36	1.81
Cyprus	2.29	0.85	2.26	0.92	2.49	0.98	2.65	1.02	2.99	1.08	3.47	1.26
Czech Republic	5.14	3.73	6.44	4.93	6.32	4.77	6.66	5.07	6.50	5.47	7.32	5.88
Estonia	0.67	0.38	0.87	0.47	1.17	0.65	1.32	0.81	1.40	0.86	1.63	1.04
Hungary	3.98	2.72	4.73	2.78	5.08	3.06	5.29	3.70	5.32	4.00	6.83	4.89
Lithuania	0.37	0.38	0.63	0.53	0.91	0.79	0.99	0.78	1.02	0.74	1.15	0.74
Latvia	0.55	0.19	0.89	0.59	0.91	0.58	0.99	0.72	0.99	0.66	1.32	0.84
Malta	0.80	0.57	0.84	0.59	0.98	0.64	1.05	0.71	1.15	0.79	1.20	0.95
Poland	8.16	5.46	7.68	5.00	7.86	5.06	9.67	5.91	7.85	6.55	11.27	9.76
Romania	1.14	1.39	1.23	1.53	1.34	1.71	1.09	1.67	1.28	1.68	1.92	2.19
Slovenia	1.55	1.11	1.68	1.18	1.81	1.25	1.81	1.37	1.78	1.44	2.05	1.57
Slovak Republic	1.82	1.40	1.63	1.60	1.92	1.85	2.10	2.09	1.82	1.77	2.49	2.02
Turkey	11.17	3.84	10.28	5.06	17.08	7.50	20.80	8.80	15.39	8.40	21.13	8.84
Total	38.98	23.32	40.67	26.42	49.82	30.03	56.01	33.88	49.16	34.82	64.13	41.78

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The methodological framework used is that of the fifth edition of the International Monetary Fund (IMF) Balance of Payments manual.

Trade in services is the second major category of the current account. International trade in services statistics give information on the external services transactions involving cross border supply, consumption abroad, and the presence of natural persons not exceeding one year.

Transactions in services are many and varied. The item *services* is subdivided in three components: *transportation*, *travel* and *other services*.

Transportation covers all transportation (sea, air, and other – including land, international waterway, space and pipelines) services that are performed by residents of one economy for those of another. Transportation services involve the carriage of passengers – registered in balance of payments under passenger services; the movements of goods – under freight services; and rentals (charters) of carriers with crew, and related supporting and auxiliary services – under supporting, auxiliary and other transport services.

Travel covers primarily the goods and services acquired from an economy by travellers during visits of less than one year in that economy. The goods and services are purchased by, or on behalf of, the traveller or provided, without a quid pro quo, for the traveller to use or give away. Excluded is the international carriage of travellers, which is covered in passenger services under transportation.

Other services reports transactions in communications services, construction services, insurance services, financial services, computer and information services, royalties and licence fees, other business services, personal, cultural and recreational services and government services, n.i.e.

New Cronos database:

Eurostat compiles and publishes international trade in services data for Candidate Countries.

All data included in this Statistics in Focus other than world exports of goods and services can be found in New Cronos Database.

IMF Database:

Data for world exports of goods and services come from the IMF annual figures.

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