

# Foreign Direct Investment in the Candidate Countries: sector and country composition

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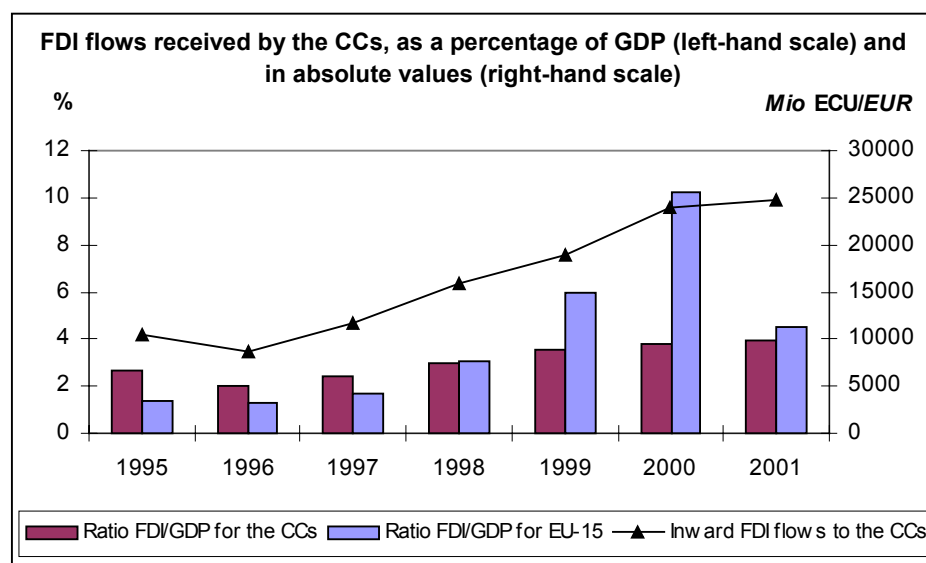
Foreign Direct Investment (FDI) statistics give information on one of the main aspects of globalisation. FDI is a supplement or an alternative to cross border trade in goods and services. For Balance of Payments statistics, Eurostat maintains an FDI database with FDI statistics declared by Candidate Countries<sup>1</sup> (CCs). It gives the geographical breakdown of FDI and it also provides users with detailed data by sector of activity.

FDI transactions in the CCs have experienced significant growth since 1996. This publication investigates the recent evolution of FDI flows to the CCs, as well as their distribution by activity and by investor country. In particular, it deals with the role played by EU Member States, the main investors in CCs. After an analysis of the recent evolution of FDI inflows to the CCs, we will try to answer questions such as *Which economic sectors were the most attractive for FDI? Which investor countries played a crucial role for each Candidate Country? In which activity sectors were each investor country specialised?*

The most recent data we use in the first part are the 2001 flows, while the analysis by economic sector and investor country is based on the stock data at end 1999.

## EUR 24.7 Bn FDI to the CCs in 2001

In 2001, the CCs received FDI flows of EUR 24.7 bn, 3% more than the previous year (EUR 23.9 bn). The graph below shows the evolution of FDI invested in the CCs from 1995 to 2001. During the period under examination



Provisional data for 2001 Candidate Countries FDI.

<sup>1</sup> The Candidate Countries are: Bulgaria, Cyprus, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, the Slovak Republic, Slovenia, Turkey.

Statistics  
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ECONOMY AND  
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THEME 2 – 55/2002

BALANCE OF PAYMENTS

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FDI inflows to the CCs more than doubled: from ECU 10.4 bn in 1995 to EUR 24.7 bn in 2001. Nevertheless, we can observe a reduction in the annual growth rate during the seven years. In 1997 and 1998 FDI increased at about 35%, while in the following three years, flows expanded but at a more moderate and decreasing pace (19% in 1999, 27% in 2000 and 3% in 2001). In the graph on the previous page FDI inflows to the CCs are compared with their GDP; the same ratio is presented for the European Union as well. Over the 1995-2001 period, this ratio for the CCs increased progressively from 2.7% to 3.9%, recording an only decrease in 1996 (when the ratio reached 2%). EU FDI inflows were, in comparison with GDP, smaller during the first three years, but then exceeded the CCs ratio: in particular in 2000, when the FDI inflows increased also as an effect of financial transactions linked to mergers and acquisitions that involved EU enterprises.

Direct investments from the CCs to other countries also increased during the period under examination: from ECU 143 mio in 1995 to EUR 1587 mio in 2001. In 2001, the main investing countries were Turkey (EUR 555 mio), Hungary (EUR 379 mio) and Cyprus (EUR 243 mio).

Net FDI inflows to the CCs more than doubled during the seven years under examination (from ECU 10 bn in 1995 to EUR 25 bn in 2001). FDI were the main source in financing the current account deficits that characterised CCs, in particular from 1996 onwards. In fact FDI far outweighed other elements of the balance of payments financial account, e.g. portfolio investment in 2001 registered net outflows of EUR 200 mio.

In the table below, the FDI inflows are shown for each Candidate Country in absolute value and as a percentage of GDP, from 1997 to 2001. During this period, FDI flows received by the CCs doubled, going from ECU 12 bn to EUR 25 bn. Poland, the Czech Republic, Turkey and Hungary were the main recipients of FDI, with EUR 18 bn in 2001 as a whole. The concentration of FDI increased during the first years of the period under examination: in 1997 the four countries mentioned above were the target of 69% of the total, while in 2000 their cumulative weight reached 77%, slightly reducing, in 2001, to 74%. In general, the concentration of FDI was less pronounced looking at the ratio of GDP. In any case, Poland, Hungary and, above all, the Czech Republic registered a ratio greater than the average for nearly all years. Similarly, the Baltic Countries recorded often high ratios, in particular Estonia. Among the other countries, Malta registered a high ratio of FDI to GDP, particularly in 1999 and 2000.

#### Inward FDI flows to CCs, in absolute values (mio ECU/EUR) and as a percentage of GDP (%), 1997-2001

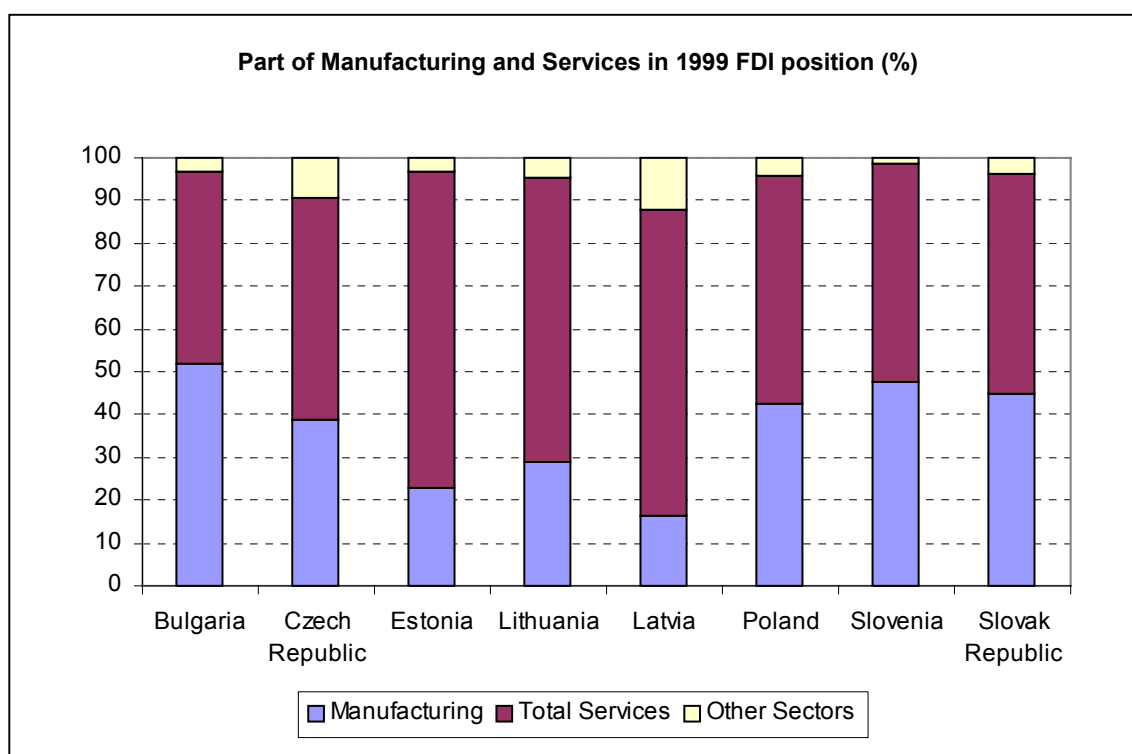
|              | 1997          |            | 1998          |            | 1999          |            | 2000          |            | 2001          |            |
|--------------|---------------|------------|---------------|------------|---------------|------------|---------------|------------|---------------|------------|
|              | Mio ECU       | % of GDP   | Mio ECU       | % of GDP   | Mio EUR       | % of GDP   | Mio EUR       | % of GDP   | Mio EUR       | % of GDP   |
| Bulgaria     | 445           | 4.9        | 479           | 4.2        | 723           | 5.9        | 1 086         | 7.9        | 397           | 2.6        |
| Cyprus       | 433           | 5.8        | 237           | 2.9        | 642           | 7.4        | 872           | 9.1        | 728           | 7.1        |
| Czech Rep.   | 1 148         | 2.5        | 2 416         | 4.8        | 4 792         | 9.3        | 5 405         | 9.7        | 5 489         | 8.7        |
| Estonia      | 235           | 5.8        | 513           | 11.0       | 284           | 5.8        | 425           | 7.6        | 603           | 9.8        |
| Hungary      | 1 928         | 4.8        | 1 815         | 4.3        | 1 849         | 4.1        | 1 837         | 3.6        | 2 730         | 4.7        |
| Lithuania    | 313           | 3.7        | 826           | 8.6        | 456           | 4.6        | 410           | 3.4        | 498           | 3.7        |
| Latvia       | 460           | 9.3        | 318           | 5.8        | 352           | 5.7        | 442           | 5.7        | 198           | 2.3        |
| Malta        | 71            | 2.4        | 238           | 7.6        | 830           | 24.3       | 674           | 17.5       | 350           | 8.7        |
| Poland       | 4 328         | 3.4        | 5 677         | 4.0        | 6 821         | 4.7        | 10 133        | 5.9        | 6 377         | 3.2        |
| Romania      | 1 071         | 3.4        | 1 812         | 4.8        | 977           | 2.9        | 1 110         | 2.8        | 1 442         | 3.2        |
| Slovenia     | 414           | 2.6        | 178           | 1.0        | 78            | 0.4        | 149           | 0.8        | 562           | 2.7        |
| Slovak Rep.  | 154           | 0.8        | 504           | 2.6        | 306           | 1.6        | 318           | 1.5        | 1 647         | 7.2        |
| Turkey       | 710           | 0.4        | 838           | 0.5        | 763           | 0.4        | 1 063         | 0.5        | 3 647         | 2.2        |
| <b>TOTAL</b> | <b>11 711</b> | <b>2.4</b> | <b>15 852</b> | <b>3.0</b> | <b>18 872</b> | <b>3.5</b> | <b>23 925</b> | <b>3.8</b> | <b>24 669</b> | <b>3.9</b> |

Provisional data for 2001.

## Services were the main target sector of FDI to CCs in 1999

At the end of 1999<sup>2</sup>, the distribution of FDI positions in the CCs by main activity sectors<sup>3</sup> were fairly homogeneous among the eight countries producing data with an activity breakdown<sup>4</sup>. In fact, FDI positions were concentrated in two activity sectors: in nearly all the cases the first sector is total Services, followed by Manufacturing. The two sectors made up respectively 40% and 54% of total Direct Investments received from abroad at the end of 1999 by the countries under examination.

The graph below illustrates the part of these sectors in the aggregate inward FDI received by each Candidate Country from abroad.



Bulgaria was the only country where the stock position was dominated by Manufacturing (52% of total activity), followed by Services (45%).

For the other countries, Services took the first position, with a different weight from one country to another. We can identify three groups: a first group composed of Bulgaria alone, where Services account for less than 50% of FDI; a second group including the Czech Republic, Poland, Slovenia and the Slovak Republic where Services account for between 51% and 53% of total activity; the last composed of the Baltic Countries, where Services are much higher than the average of the eight countries (above 65%).

The following section further develops the detail of Manufacturing and Services sectors for each of the three groups of countries.

<sup>2</sup> As stock data are generally provided with a delay of one year of in comparison with flows data, Eurostat has already received the stock data for 2000 from the majority of the CCs. But unfortunately these data contain some missing information, so we preferred to use 1999 data. In any case, the available 2000 data present an activity structure similar to 1999.

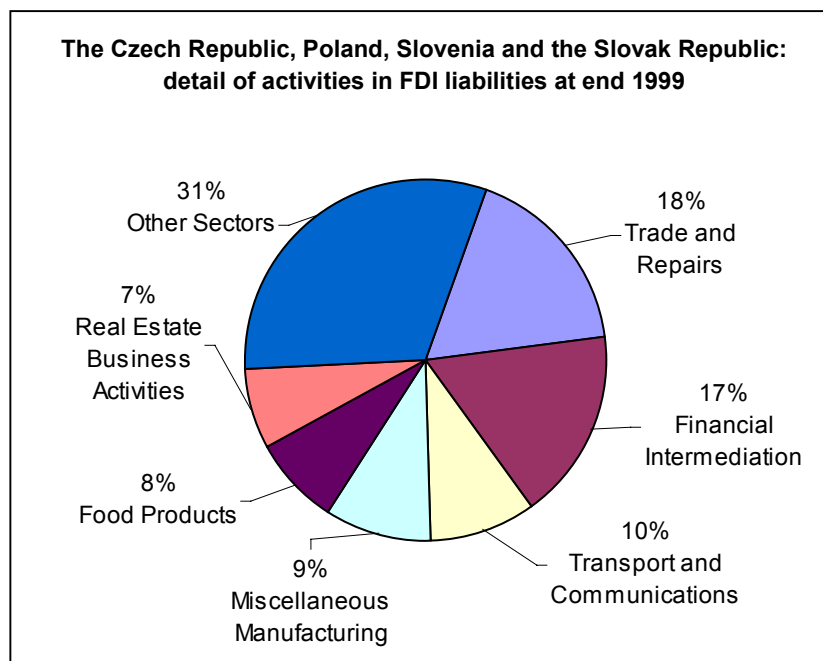
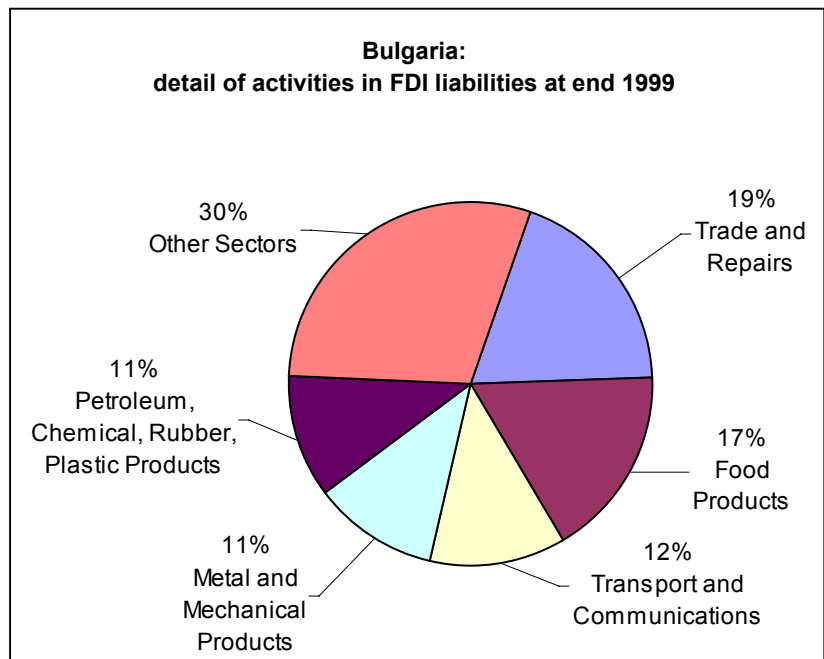
<sup>3</sup> The sectors considered are Agriculture and Fishing; Mining and Quarrying, Manufacturing, Electricity, Gas and Water; Construction, Services. In the methodological notes at the end of this article, more information can be obtained on the breakdown of these main activities sectors.

<sup>4</sup> These countries are Bulgaria, the Czech Republic, Estonia, Lithuania, Latvia, Poland, Slovenia and the Slovak Republic.

Bulgaria is the only of these eight countries where **Manufacturing was the dominant sector**: FDI stocks were mainly concentrated in the following Manufacturing sub-sectors: Food Products (17% of total activity), Metal and Mechanical Products (11%) and Petroleum Products (11%). These three activities together accounted for three-quarters of manufacturing sector and 39% of total activity.

The graph shows the weight of the main sectors in total FDI in Manufacturing and Services and other activities. The considered sub-sectors are placed in decreasing order, beginning with the most relevant activity.

The second group is composed of the four countries where **the weight of Services was between 51% and 53% of total FDI** at end 1999.



For the Czech Republic, Poland, Slovenia and the Slovak Republic as a whole, Services accounted for 53% of FDI; within the Services sectors, Trade and Repairs and Financial Intermediation attracted a great part of FDI inflows (as a whole 35% of the total). In addition to these activities, the Czech Republic also recorded significant investment in Transport and Communications (12% of the total), and Miscellaneous Manufacturing (12%). In Poland, Food Products and Telecommunications presented a significant weight (both 9%).

In the Slovak Republic, Trade and Repairs were more important than the sum of the four countries making up the group (26% against 18%), followed by Metal and Mechanical Products (17%) and Financial Intermediation (15%).

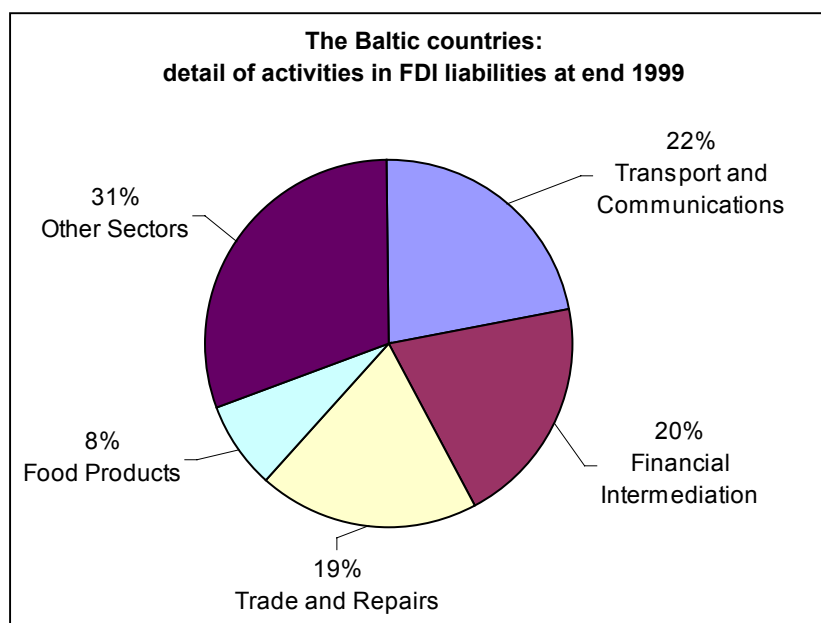
In Slovenia, Real Estate and Business and Petroleum Activities were the third and fourth sectors (representing, respectively, 13%, and 12% of direct investment from abroad) after Trade and Repairs and Financial Intermediation (17% and 18%, respectively).

The graph above illustrates the shares of the most significant activities in total FDI received by the four countries composing the group under examination: Czech Republic, Poland, Slovenia and Slovak Republic.

The Baltic Countries are distinguished from the other Candidate Countries by a **stronger concentration of FDI inflows in Services**: 73% for Estonia, 71% for Latvia and 66% for Lithuania. Foreign investors invested their assets in Trade and Repairs (19%), Financial Intermediation (20%), and Transport and Communications enterprises (22%).

In Estonia, the country where FDI invested in Services took the largest share, Transport and Communications ranked first (28% of total FDI), followed by Financial Intermediation (24%).

In Latvia and Lithuania, Trade and Repairs came first with respectively 22% and 23% of the investment, followed by Transport and Communications (respectively 20% and 19%) and Financial Intermediation (respectively 19% and 16%).



The graph above illustrates the specialisation of FDI stock in the Baltic Countries for the total of the three countries.

### 1999 FDI stocks by activity sector and investor country

In the paragraphs below, we intend to examine which countries mainly invested FDI in the CCs and in which activity sectors.

The European Union Member States were the main sources of FDI for the CCs from 1996 onwards: in 1999, they provided 79% of the total FDI liabilities in CCs<sup>5</sup>. In 1999 stock, EU residents provided 86% of FDI in the Czech Republic and 80% in Poland. The United States also showed an interest in the CCs, providing 11% of 1999 FDI stocks in Poland and 7% in the Czech Republic.

In general, EU investors showed a preference for the CCs which are geographically close to their own country. Swedish, Finnish and Danish investors were active in the Baltic countries, contributing 49% of inward FDI stocks. In particular, Swedish investors supplied 41% of Estonian and 17% of Lithuanian FDI stocks, mainly invested in Financial Intermediation activities. Austrian and German investors were important sources of FDI for Slovenia and the Slovak Republic. In Poland, Dutch investors held the largest stocks, followed by German and French.

At the end of 1999, more than half of foreign direct investment in the CCs was held by three countries: the Netherlands (22%), Germany (20%) and the United States (9%). Austrian and French investors (both 7%) also had a significant share of FDI in the CCs.

In order to analyse in detail the sectors of investment of the main investor countries we again consider the three groups of CCs used in the previous paragraph, with the exception of Bulgaria, for which FDI data with a geographical breakdown were not available.

As mentioned before, the main sectors of investment in the second group (the Czech Republic, Poland, Slovenia and the Slovak Republic) were Trade and Repairs, Financial Intermediation and Transport and Communications.

<sup>5</sup> In 2000, this ratio reached 87%. For more information on the role of EU investors in CCs FDI see *Statistics in Focus Theme 2 – 24/2002, “EU Member States largest Foreign Direct Investors in Candidate Countries”*. For this ratio, we considered the countries for which data are available: Bulgaria, Czech Republic, Estonia, Lithuania, Latvia, Poland, Slovenia and Slovak Republic.

Dutch investors, followed by German, were the largest contributors of FDI capital to the Czech Republic and in Poland. In the Czech Republic, the Dutch invested primarily in Transport and Communications (35% of Dutch assets in the Czech Republic), whereas Germans preferred the Trade and Repairs sector (16%). Belgium and Luxembourg held first position in Financial Intermediation assets (dominated mainly by Monetary Intermediation). In Poland, the Dutch preferred Trade and Repairs whereas Germans invested mainly in Financial Intermediation. Austrian and German residents held the most significant positions in Slovenia and in the Slovak Republic (55% of FDI assets in Slovenia and 39% in the Slovak Republic). Financial Intermediation followed by Trade and Repairs attracted the largest amounts of their FDI. Austrians provided 84% of the FDI position in Financial Intermediation in Slovenia and 25% in the Slovak Republic.

For the third identified group, the Baltic Countries, we can consider only two countries, because FDI data with the activity breakdown by partner were not available for Lithuania.

The main investors of FDI capital in the Baltic Countries were the Swedish, followed by the Finnish, the American and the Danish investors.

In Estonia, Swedish investors held the strongest position at the end of 1999 (41% of total FDI stocks), concentrating their assets mainly in Financial Intermediation (53% of Swedish assets in Estonia, largely concentrated in Monetary Intermediation), and Transport and Communications. Finland invested mainly in Telecommunications and Trade and Repairs (35% and 23% respectively).

In Latvia, Denmark, the United States and Germany were the main contributors of FDI assets at the end of 1999. The Danish invested mainly in Transport and Communications, while the Americans preferred Trade and Repairs and the Germans held a strong position in Financial Intermediation.

In the following table, we present the specialisation of the main investor countries of FDI in the Czech Republic, Estonia, Latvia, Poland, Slovenia and the Slovak Republic at end 1999. The investor countries covered are those who invested more than EUR 1500 mio in the six Candidate Countries as a whole (the investor countries are put in descending order, beginning with the country with higher FDI stock in the six countries considered as a whole). For each investor country, the activity sectors receiving the largest amount of FDI are given.

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

**Foreign direct investment (FDI)** is the category of international investment, within the Balance of Payments Financial Account, that reflects the objective of obtaining a lasting interest by a resident entity in one economy in an enterprise resident in another economy. The lasting interest implies the existence of a long-term relationship between the direct investor and the enterprise, and a significant degree of influence by the investor on the management of the enterprise. Formally defined, a direct investment enterprise is an unincorporated or incorporated enterprise in which a direct investor owns 10% or more of the ordinary shares or voting power (for an incorporated enterprise) or the equivalent (for an unincorporated enterprise).

### **FDI flows and positions**

Through direct investment flows, an investor builds up a foreign direct investment position that features in the international investment position of the country. This FDI position (sometimes called FDI stock) differs from the accumulated flows because of revaluation (changes in prices or exchange rates, and other adjustments like rescheduling or cancellation of loans, debt forgiveness or debt-equity swaps).

### **Data Base for BoP CCs**

Eurostat publishes in New Cronos annual data about the stocks and the flows of FDI and the income related to these aggregates, beginning with the year 1997. The CCs, as well as the EU MSs, are requested to provide data with a detailed breakdown by countries and sectors of activity. However, the data are not available for every country and every year with the required breakdown. In this review, we referred to the data sent by the CCs to Eurostat. For the Czech Republic, we used also statistics from the website of the Czech National Bank for 2000 flows. For Lithuania, we employed 2000 data for stocks.

In the activities breakdown the sectors considered are Agriculture and Fishing, Mining and Quarrying, Manufacturing, Electricity, Gas and Water, Construction, Services. *Services* consist of trade and repairs, hotels and restaurant, transport and communications, financial intermediation, real estate and business activities, other services. *Manufacturing* includes food products; textiles and wood activities; petroleum, chemical, rubber and plastic products; metal and mechanical products; machinery, computers, RTV, communications; vehicles and other transport equipment.

Specialisation of the main investor countries in the Czech Republic, Estonia, Latvia, Poland, Slovenia and the Slovak Republic - 1999 stock (*mio EUR*)

|  |  | CZECH<br>REPUBLIC | ESTONIA      | LATVIA     | POLAND       | SLOVENIA     | SLOVAK<br>REPUBLIC |
|--|--|-------------------|--------------|------------|--------------|--------------|--------------------|
| NETHERLANDS                                    | <b>TOTAL</b>                                   | <b>5 368</b>      | <b>38</b>    | <b>48</b>  | <b>6 637</b> | <b>105</b>   | <b>388</b>         |
|  | Manufacturing                                  | 1 463             | 3            | 1          | 2 747        | 49           | 239                |
|  | -Food Products                                 | 676               | 3            | 1          | 1 124        | 29           | 130                |
|  | -Petroleum, Chemical, Rubber, Plastic Products | 157               | 0            | 0          | 324          | 7            | 40                 |
|  | -Metal and Mechanical Products                 | 81                | -            | 0          | 289          | 3            | 27                 |
|  | Trade and Repairs                              | 1 051             | 3            | 18         | 1 729        | 35           | 23                 |
|  | Transport and Communications                   | 1 878             | 22           | 26         | 740          | 1            | 24                 |
|  | Financial Intermediation                       | 339               | 1            | 0          | 716          | 0            | 80                 |
| GERMANY  | <b>TOTAL</b>                                   | <b>4 651</b>      | <b>58</b>    | <b>152</b> | <b>5 366</b> | <b>342</b>   | <b>560</b>         |
|  | Manufacturing                                  | 2 574             | 19           | 52         | 2 357        | 283          | 403                |
|  | -Food Products                                 | 119               | 0            | 4          | 524          | 46           | 30                 |
|  | -Vehicles + Other Transport Equipment          | 663               | 0            | 1          | 310          | 7            | 79                 |
|  | -Metal and Mechanical Products                 | 259               | 2            | 5          | 211          | 55           | 112                |
|  | Trade and Repairs                              | 726               | 9            | 28         | 967          | 49           | 82                 |
|  | Financial Intermediation                       | 428               | 5            | 35         | 1 190        | 1            | 55                 |
|  | UNITED<br>STATES OF<br>AMERICA                 | <b>TOTAL</b>      | <b>1 176</b> | <b>97</b>  | <b>191</b>   | <b>2 934</b> | <b>106</b>         |
| Manufacturing                                  |  | 543               | 34           | 25         | 1 050        | 25           | 149                |
| -Petroleum, Chemical, Rubber, Plastic Products |  | 239               | 11           | 1          | 401          | 9            | 45                 |
| -Vehicles + Other Transport Equipment          |  | 144               | 0            | 0          | 137          | 1            | 0                  |
| Trade and Repairs                              |  | 61                | 10           | 98         | 433          | 4            | 55                 |
| Financial Intermediation                       |  | 317               | 4            | 27         | 773          | 36           | 44                 |
| AUSTRIA  | <b>TOTAL</b>                                   | <b>1 772</b>      | <b>26</b>    | <b>22</b>  | <b>830</b>   | <b>1 117</b> | <b>538</b>         |
|  | Manufacturing                                  | 384               | 23           | 7          | 189          | 236          | 110                |
|  | -Textiles + Wood Activities                    | 85                | 3            | 2          | 19           | 97           | 7                  |
|  | Trade and Repairs                              | 488               | 4            | 1          | 86           | 181          | 169                |
|  | Financial Intermediation                       | 477               | 0            | 2          | 432          | 411          | 106                |
| UNITED<br>KINGDOM                              | <b>TOTAL</b>                                   | <b>885</b>        | <b>67</b>    | <b>107</b> | <b>939</b>   | <b>103</b>   | <b>277</b>         |
|  | Manufacturing                                  | 175               | 17           | 20         | 465          | 45           | 161                |
|  | -Petroleum, Chemical, Rubber, Plastic Products | 0                 | 0            | 5          | 207          | 23           | 0                  |
|  | -Metal and Mechanical Products                 | 114               | 0            | 0          | 34           | 0            | 158                |
|  | Trade and Repairs                              | 116               | 26           | 35         | 242          | 29           | 107                |
| SWEDEN   | <b>TOTAL</b>                                   | <b>257</b>        | <b>996</b>   | <b>166</b> | <b>653</b>   | <b>3</b>     | <b>17</b>          |
|  | Manufacturing                                  | 165               | 135          | 44         | 291          | 1            | 11                 |
|  | -Textiles + Wood Activities                    | 101               | 35           | 26         | 99           | 0            | 8                  |
|  | -Transport and Communications                  | 0                 | 262          | 35         | 80           | 1            | 0                  |
|  | Financial Intermediation                       | 0                 | 529          | 31         | 64           | 0            | 0                  |
| BELGIUM and<br>LUXEMBOURG                      | <b>TOTAL</b>                                   | <b>984</b>        | <b>7</b>     | <b>1</b>   | <b>572</b>   | <b>19</b>    | <b>42</b>          |
|  | Manufacturing                                  | 235               | 2            | -          | 285          | 8            | 10                 |
|  | Financial Intermediation                       | 655               | -            | -          | 144          | 0            | 0                  |

The symbol “-“ means that the data are not available.

# Further information:

## ➤ Databases

NewCronos,  
Domain Theme2/bop/bopcc

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ORIGINAL: English. Marie-Laure Begue carried out the data processing and statistical analysis

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