

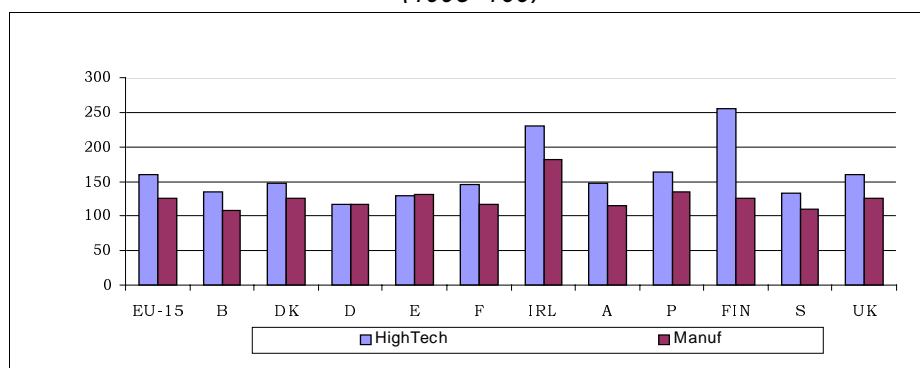
STRUCTURAL BUSINESS STATISTICS

Joachim Hubertus

HIGH-TECHNOLOGY INDUSTRIES Key manufacturing sectors

Characteristics of high-technology (high-tech) industries

Figure 1: Turnover trend in manufacturing and in the high-tech industry, 1999
(1995=100)



Source : Eurostat - SBS database

- While manufacturing as a whole saw a growth in turnover of 26% between 1995 and 1999, the figure was 60% for the high-technology branch.
- In 1999, almost 8% of manufacturing employees worked in a high-tech industry.
- Manufacturing of electronic and communications equipment [radio, television and communication equipment and apparatus - NACE Rev.1 DL 32] accounted in 1999 for 43% of invoiced turnover and for 46.9% of persons employed in high-tech industries.
- Major producers in Finland and Sweden (Nokia and Ericsson) contribute to the strong growth in the manufacture of electronic and communications equipment in Europe between 1995 and 1999.
- In 1998 the apparent labour productivity of the high-tech workforce was ECU 68 900 per person employed, compared with ECU 51 400 in manufacturing as a whole. The pharmaceutical industry headed the list at ECU 80 200; electronic and communications came last, at ECU 55 400.

The criteria applied in classifying a sector as a high-technology industry are based on an OECD* classification. The NACE Rev.1 divisions and groups featured in this analysis are:

- **DG 24.4** : Manufacture of pharmaceuticals, medicinal chemicals and botanical products
- **DL 30** : Manufacture of office machinery and computers
- **DL 32** : Manufacture of radio, television and communication equipment and apparatus
- **DM 35.3** : Manufacture of aircraft and spacecraft

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 32/2001

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Introduction

With the advancing globalisation of the economy, technology is a key factor in boosting the growth and competitiveness of businesses. This issue of *Statistics in Focus* analyses those sectors of industry whose

principal activity is one of high technological intensity: the high-tech industry.

The OECD classification quoted on page 1 is used to classify a sector as high-tech. The four sectors

analysed differ from the other sectors of the economy by the high technological intensity introduced into their manufacturing processes, measured by the amount spent on R&D (research and development).

Importance of the high-tech industries and the trend from 1995 to 1999

Turnover

Table 1 shows the turnover values of the high-tech industries as percentages of total high-tech turnover.

One striking result of the analysis is the growing dominance between 1995 and 1999 of **electronics and communications** (NACE Rev.1 DL 32), which in 1999 accounted for 43% of all high tech turnover in EU-15.

This growth in relative importance, seen in most Member States but above all in Finland (from 70.5% in 1995 to 87.6% between 1995 and 1999), is due to the large-scale producers in Europe such as Nokia in Finland and Ericsson in Sweden. With increases of 8.3 and 6.4 points in Portugal and Ireland respectively, this industry made up substantial ground against the pharmaceutical industry during the observation period.

The **aerospace industry** (NACE Rev. 1 DM 35.3) also showed an upward trend, though less steep, from 1995 to 1999 in almost all of the countries analysed. At European level, turnover in the high-tech sector was up by 4.7 points in the observation period. France (+10.8 percentage points) shows the sharpest increase; the pharmaceutical industry again lost ground on the French high-tech market.

Table 1: High-tech industries and their turnover shares (1995 and 1999)
(%)

	Pharmaceuticals (DG 24.4)		Office machinery and computers (DL30)		Electronics and communications (DL32)		Aerospace (DM35.3)	
	1995	1999	1995	1999	1995	1999	1995	1999
EU-15	26.6	21.9	22.5	17.6	38.1	43.0	12.8	17.5
B	50.5	46.9	3.1	1.6	40.1	40.7	6.3	10.8
DK	59.8	60.2	6.5	3.8	33.7	36.0	:	:
D	27.4	32.3	23.2	13.5	37.6	39.1	11.8	15.1
E	46.2	42.7	20.7	20.2	27.3	29.1	5.8	8.0
F	34.3	27.9	18.6	17.8	29.2	29.6	17.9	28.7
IRL	18.6	15.4	66.2	63.0	15.2	21.6	:	:
I	37.2	40.8	22.7	14.6	30.5	34.7	9.6	9.9
A	21.1	19.0	0.6	7.7	78.1	73.0	0.2	0.3
P	36.3	26.5	1.6	2.8	60.2	68.5	1.9	2.2
FIN	11.7	4.9	16.9	7.1	70.5	87.6	0.9	0.5
S	25.2	19.8	5.3	2.9	69.5	71.3	8.4	7.6
UK	18.8	20.0	27.9	18.8	31.4	34.7	21.9	26.5

Source : Source : Eurostat - SBS database

Notes : DK, IRL: DM 35.3 not available; France : 1998 instead of 1999 data. United Kingdom: 1996 instead of 1995 data; for DM 35.3 the comparison for Sweden refers to 1997-1998.

The **pharmaceutical industry** (NACE Rev. 1 DG 24.4) and the **manufacture of office machinery and computers** (NACE Rev. 1 DL 30) show pockets of economic success.

In Denmark and Italy, pharmaceuticals are of growing importance to the high-tech sector, accounting for 60.2% and 40.8% respectively in 1999. The industry lost ground in the EU as a whole, however, with a drop in turnover of 4.7 points in relative terms.

At European level, the manufacture of computers and office machinery recorded the biggest fall-off in the high-tech market (-4.9 points) between 1995 and 1999. With 63% of the high-tech market the sector remains the key high-tech industry in Ireland, however, despite the fall-off since 1995.

A more detailed analysis of the two industries in decline shows that they have similar structures, each consisting of two sub-sectors (NACE Rev.1 classes) of a similar type (**Table 2**).

Manufacture of computers and office machinery: the share of computer manufacture (including other IT hardware), which accounts for over 80% of this industry, grew slightly between 1995 and 1999, while the relative value of office machinery diminished.

The computer branch differs from the office machinery branch in terms of the extent and level of technological innovation invested in the production process. In the computer branch, innovation is manifest in the novelty of products marketed (very high technological intensity); with office machinery it is seen in improvements to existing products.

The **pharmaceutical industry** is a

Table 2: Composition of turnover (%) in the sub-sectors of pharmaceuticals and computers and office machinery manufacture, in Europe

Sector	Sub-Sector	Year	
		1995	1999
Pharmaceuticals	Basic pharmaceuticals	20.3	12.7
	Manufacture of pharmaceuticals	79.7	87.3
Computers and office machinery	Office machinery	16.9	15.6
	Computers, IT Equipement	83.1	84.4

Source: Eurostat -SBS database.

similar case. Here, the production of pharmaceutical preparations (including medicines, vaccines etc.) is far ahead of the basic pharmaceutical industry. In terms of market share, the former gained further ground

over the latter during the observation period. The innovation and product novelty aspect is vital and obvious for the pharmaceutical preparations sector and important to its economic success.

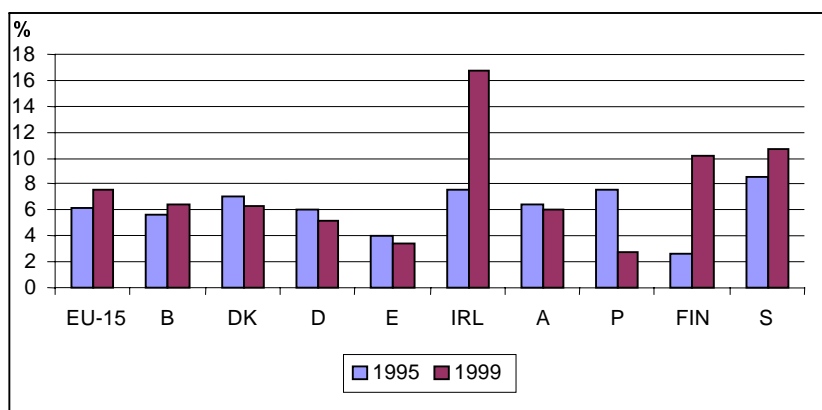
Employment

Situation in 1999

At European level, the high-tech industry accounted for 7.7% of employment in manufacturing in 1999. **Figure 2** shows that this figure increased (by 1.6 points) during the observation period. Of the countries analysed, Ireland showed the sharpest upward trend from 1995 to 1999, at 9.1 points. Finland (+ 7.5), Sweden (+2.2) and Belgium (+0.7) also showed rising figures, while the remaining countries recorded a stagnation or a slight drop in the employment trend in the sectors analysed.

Where the sectoral distribution of employment is concerned, as with turnover, the electronics and com-

Figure 2: Employment in the high tech industry as a percentage of employment in manufacturing, 1995 and 1999.



Source : Eurostat - SBS database

Note : EU-15 data are estimated

munications industry (NACE Rev.1, DL 32) led the field at EU level.

Employment in Electronics and Communications

46.9% of the persons employed in high-tech industry in Europe work in this sector (**Figure 3**).

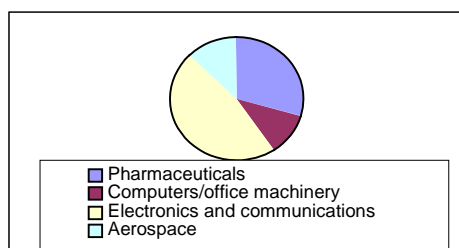
A breakdown by country reveals that those in which the sector is most

prominent in terms of numbers employed are Finland (80.7% of high-tech employment) and Austria (76.3%) (**Table 3**).

The electronics sector also accounts

for a high proportion of high-tech employment in the other Member States, however; the lowest value, in Ireland, is still 31.2% of employment in the high-tech industry.

Figure 3 : Distribution of employment in the high tech industries in Europe, 1999.



Source : Eurostat - SBS Database

Note : The EU value excludes F, NL, UK

A more detailed analysis of the three sub-sectors (NACE Rev.1 classes) making up the electronics and communications sector shows that, in most of the Member States observed, employment is shared

fairly evenly amongst them (Table 4). Some countries specialise to some extent in a specific economic activity, however. Table 4 demonstrates the relative importance of the television and

radio transmitters and telephony apparatus manufacturing sector (NACE Rev.1 DL 32.02) in Finland (84%) and Sweden (77%).

Table 4 : Distribution of employment (%) in the sub-sectors of the electronics and communications industry in 1999

	B	DK	D	E	IRL	I	A	P	FIN	S
Electronic components	20.8	27.4	39.7	39.0	63.1	31.9	32.0	24.0	12.7	14.2
TV and radio transmitters	44.0	23.8	32.6	38.3	29.6	58.5	52.2	34.1	84.0	77.0
TV and radio receivers	35.2	48.8	27.7	27.8	7.3	9.6	15.8	41.9	3.3	8.8

Source : Eurostat - SBS database

Employment trends

In most of the countries observed there was strong to exceptional growth in jobs in the high-tech industry between 1995 and 1999, while employment in manufacturing as a whole remained virtually unchanged at EU level (Table 5). Ireland showed the strongest employment growth (+49.3%) in the high-tech sector; these figures are dependent on performance in all industries analysed. Ireland also shows very strong growth in employment (+12.2%) throughout manufacturing.

Italy recorded the sharpest drop in the observation period, at -10.5%, reflecting the fall-off in all high-tech industries but above all a drop of

30.6% in employment in the office machinery and computer manufacturing branch. Jobs in this sector fell sharply (-12.8%) in the EU as a whole in the period observed, but there was also a geographical concentration. While the number of persons employed in the industry dwindled in most countries between 1995 et 1999, Ireland and Austria showed exceptional growth (+39.2% and +73.1% respectively).

Concentrations of employment in some Member States are also evident in other high-tech industries, highlighting the specialisation of these countries in the various high-tech sectors.

Employment in aerospace fell in

Finland by over 20% between 1995 and 1999, but rose sharply in Belgium (+59% between 1995 and 1999), Austria (+52%) and Portugal (+39.6%).

Table 5 : Variation in the numbers of persons employed in the high-tech industries and in manufacturing, 1995-1999 (%)

	Pharmaceuticals	Computers, office machinery	Electronics and communications	Aerospace	High-Tech	Manufacturing
EU-15	5.4	-12.8	:	2.1	:	0.1
B	4.8	-25.2	3.2	59.0	8.8	-2.3
DK	22.4	-9.0	19.7	:	18.7	-3.6
D	10.0	-32.0	-1.7	-2.0	-3.7	10.7
E	-8.2	-18.5	3.4	6.7	-3.7	12.6
F	3.9	16.7	0.2	-1.3	2.6	-1.4
IRL	48.0	39.2	69.4	:	49.3	12.2
I	-2.3	-30.6	-8.3	-13.8	-10.5	:
A	1.1	73.1	-10.6	52.0	-7.3	-2.7
P	-17.0	-10.3	19.2	39.6	7.1	3.2
FIN	-7.2	-46.0	58.1	-20.3	31.8	9.4
S	29.3	-16.7	22.8	:	39.6	4.8

Source : Eurostat - SBS database

Notes: The comparison for France is between 1996 and 1998

EU-15 data are estimated.

Employment in the electronics and communications sector was up in most of the countries observed. The increase was exceptional in Ireland (+69.4% between 1995 and 1999) and Finland (+58.1%), but figures fell in Austria (-10.6%) and Italy (-8.3%) in the observation period.

Apparent labour productivity

Table 6 : Apparent labour productivity in high tech industries and in manufacturing, 1995-1998 (ECU '000)

	1995		1996		1997		1998	
	High-Tech	Manuf	High-Tech	Manuf	High-Tech	Manuf	High-Tech	Manuf
B	81,5	59,5	82,3	56,8	88,6	59,0	81,4	59,5
DK	60,3	40,1	68,4	42,2	60,7	43,5	69,2	46,4
D	53,3	50,4	55,9	52,2	61,5	53,0	64,1	54,7
EL	23,1	20,0	24,1	20,0	34,0	30,0	38,4	30,0
E	52,2	30,0	58,2	30,0	58,6	30,0	59,4	40,0
F	:	:	61,2	44,9	67,5	46,3	69,1	48,1
IRL	114,1	64,8	95,7	69,5	108,2	82,9	103,9	87,6
I	47,7	30,0	51,9	40,0	53,3	40,0	:	:
L	:	57,7	:	56,9	:	62,0	:	64,0
NL	:	55,7	59,8	56,1	65,8	:	:	:
A	63,8	49,0	:	:	63,4	48,4	75,8	51,2
P	:	:	26,6	15,1	31,8	16,2	33,9	17,1
FIN	59,5	53,5	60,9	52,7	80,3	56,7	100,3	59,3
S	61,5	50,9	67,6	52,7	105,0	56,7	76,7	54,7
UK	:	:	52,6	40,1	67,5	49,1	:	:

Source : Eurostat - SBS database; for several countries the aggregate 'high tech' was calculated without DM 35.3 or DL 30.

In almost all Member States, the high tech industry reflects the high-tech sector exceed those of apparent labour productivity (value performance of the sector. The manufacturing as a whole in all added per person employed) in the productivity values recorded for the Member States observed, with the

widest gaps in Finland and Denmark (Table 6).

In absolute values, Finland and Ireland show the highest productivity (ECU 100 300 and 103 900 per person employed respectively).

The majority of countries show an upward trend in high-tech productivity; Finland leads the way with an increase of ECU 40 800 between 1995 and 1998.

Manufacturing, on the other hand, showed a rise in productivity in all Member States observed, though at a far more moderate level.

More detailed analysis of the various sectors of the high-tech industry shows that electronics and communications (NACE Rev.1 DL 32), comes last in productivity terms, with a value of ECU 55 400 per person employed at EU level. Product innovation in this sector and its recent market success means large numbers of jobs, but also growing standardisation of technologies, accessible to an ever-increasing number of manufacturers, which results in reduced value added. These two factors combined explain the level of productivity in this

sector.

The pharmaceuticals industry, at ECU 80 200, has the highest productivity (Table 7).

The four industries analysed show various levels of increase between 1996 and 1998, with aerospace recording the highest growth: from ECU 45 000 in 1996 to ECU 70 400 in 1998.

Table 7 : Apparent labour productivity in the sectors constituting the high-tech industry in the EU between 1996 and 1998 (ECU '000)

	Manufacturing	Pharmaceuticals	Computers, office machinery	Electronics and communications	Aerospace
1998	51.4	80.2	74.6	55.4	70.4
1997	47.6	81.2	67.5	58.4	60.3
1996	42.5	77.8	67.4	44.8	45.0

Source : Eurostat - SBS database

Conclusions

The results obtained for the high-technology sectors in terms of turnover, employment and apparent labour productivity justify their role as key manufacturing sectors.

Far from losing influence, these sectors are cornering ever more of the market and promise more growth in the future: the search for new technologies is a challenge which has to be taken up by businesses in the sector seeking to keep their position and their competitiveness.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Sources

The results in this issue of *Statistics in Focus* are taken from Eurostat's SBS database, whose name derives from the Council Regulation (EC, EURATOM) Nr. 58/97 on structural business statistics. This Regulation provides a harmonised framework for the collection of statistics from businesses in the European Union.

The database is accessible in the SBS domain of Eurostat's NewCronos reference base. It contains a large number of variables, the most important of which are turnover, value added, number of persons employed, apparent labour productivity, etc.

Variables

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties.

Turnover includes all duties and taxes on the goods or services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customer and other similar deductible taxes directly linked to turnover.

Value added at factor cost

Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes. It can be calculated from turnover, plus capitalised production, plus other operating income plus or minus the changes in stocks, minus the purchases of goods and services, minus other taxes on products which are linked to turnover but not deductible, minus the duties and taxes linked to production.

Number of persons employed

The total number of persons who work in the observation unit (employees receiving remuneration, working proprietors and unpaid family workers) as well as outside working persons who belong to the unit and are paid by it. It includes all persons who are on the payroll of the enterprise, whether they are temporarily absent (excluding long-term absences), part-time, seasonal or home workers, apprentices etc. The number of persons employed excludes manpower supplied to the unit by other enterprises and persons carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises.

Apparent labour productivity

Apparent labour productivity is defined as value added per person employed

The above SBS variables are laid down in Commission regulation (EC) No 2700/98 of 17 December 1998.

Statistical classification

The level of technological intensity as used in this publication is based on the OECD working document **Revision of the high-technology sector and product classification**.

The sectors of economic activity, classed according to the Statistical Classification of Economic Activities in the European Community (NACE Rev.1), which form part of the high-technology industry according to the criteria adopted by the OECD and which are analysed in this issue of *Statistics in Focus* are:

DG 24.4: Manufacture of pharmaceuticals, medicinal chemicals and botanical products

DL 30: Manufacture of office machinery

and computers

DL 32: Manufacture of radio, television and communication equipment and apparatus

DM 35.3: Manufacture of aircraft and spacecraft

Methodology:

The values for the high-tech industry as a whole are the sums of the values for the four sectors analysed.

- The data for the aggregate 'High tech industries' were calculated as the sum of the four sub-sectors that make up this aggregate, whenever these data were available. The aggregate 'High tech industries' was also calculated, when one subsector's data were missing. In this case, the respective tables received explanatory notes.

- The data for the four sub-sectors that make up the aggregate 'High tech industries' are not available for all Member States. The methodological approach was to exclude the countries from the analysis, which were unable to deliver the aggregate 'High tech industries'.

- EU-15 values, which are missing in the data bases, have been estimated

- The data for 1999 are preliminary.

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<http://europa.eu.int/comm/eurostat/ramon/>

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Further information

➤ Databases

New Cronos, Domain: SBS

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For information on methodology:

Joachim Hubertus, Eurostat/D2, L-2920 Luxembourg, Tel. (352) 4301 32688, Fax (352) 4301 32600

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