



Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 27/2003

Contents

Introduction	1
Turnover shares of different economic activities	1
Turnover share of computer services products in total turnover	2
Computer services turnover broken down by products	2
Product specialisation	2
Residence of clients.....	3

Computer Services

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Introduction

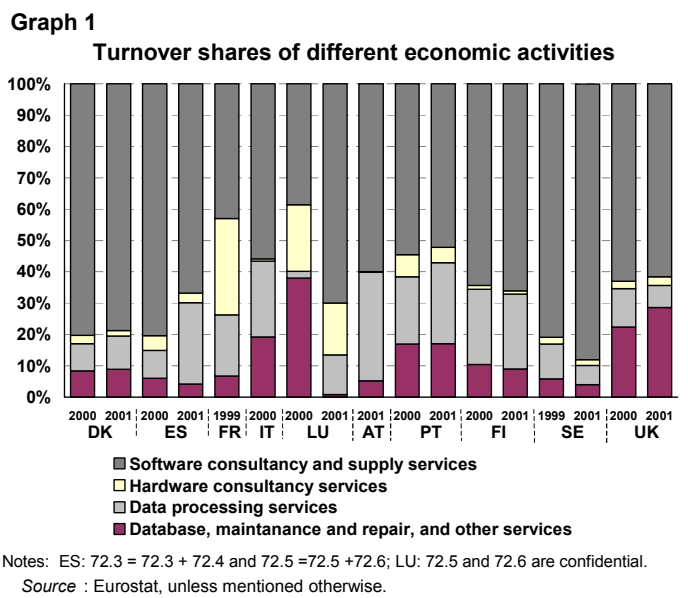
In mid-1999 Eurostat with the support of DG Enterprise began a project to improve the statistical coverage of the business services sector. After the initial methodological development and a testing period, in 2001 participating Member States launched a survey on computer services for the reference year 2000. As a part of the above project, another survey on computer services was launched in 2002 for the reference year 2001.

This Statistics In Focus (SIF) presents results from these two surveys. Eleven Member States (Denmark, Spain, France, Ireland, Italy, Luxembourg, Austria, Portugal, Finland, Sweden and the United Kingdom) have provided partial or full sets of data to Eurostat. The SIF concentrates on turnover data, broken down by client and product. The data analysed in this SIF are at this stage preliminary: no absolute figures are presented. Data are derived from sample surveys. In some cases response rates could be relatively low, therefore certain care should be taken when interpreting the data.

A more comprehensive analysis on computer services turnover, personnel costs, number of persons employed and value added data will be carried out later this year as data on additional variables become available.

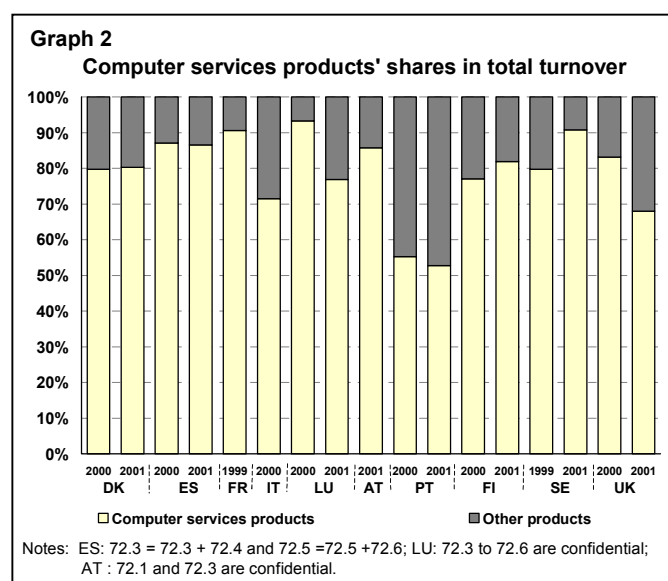
Turnover shares of different economic activities

As can be seen from Graph 1 software consultancy and supply services (economic activity NACE 72.2) are overwhelmingly the most important economic activity in computer services (division 72) in all Member States reporting for both reference years (DK, ES, LU, PT, FI, SE, UK). In addition, the turnover shares of different economic activities are very similar for both reference years. With 2001 definitive results these shares can be expected to be even more similar than with preliminary results in Spain, Luxembourg and Sweden. These shares are quite similar also in those countries, that provided data only for one reference year (1999/2000 or 2001). Data on computer services seem to be comparable over time and space.



Turnover share of computer services products in total turnover

Computer services products – hardware consultancy, software supply and other computer services – generate more than 70% of total computer services turnover in all reporting Member States except in Portugal and the United Kingdom. In the United Kingdom the share is just below 70% in 2001 and can be expected to be at the 2000 level with the definitive data. In Portugal, on the other hand, the share is at a relatively low level of around 55% in both years. This can be explained by the fact that resale generates a significant share (27-28%) of total computer services turnover in Portugal. As noted above these shares are quite similar in different Member States and also over time.



Computer services turnover broken down by products

As Table 1 shows, another product, in addition to above mentioned computer services products, with a significant turnover share in all Member States, except in Italy, is "resale". In Italy architectural and engineering design services are important product categories. Additional

category worth mentioning is "other additional products n.e.c.". This residual product should preferably have only a small share of turnover – but in Portugal and the United Kingdom it has a relatively big turnover share.

Product specialisation

From the economic point of view the question is, how dependent each economic activity is on its main product, or how large or small is the product variation/concentration, and consequently how dependent enterprises are on the market evolution of each product. For the purpose of this study computer services enterprises have been defined as product-specialised if more than 75% of their turnover comes from the main product of the respective economic activity group. The turnover share of product-specialised enterprises is above 50% only in Spain, Austria and Sweden in 2001. In all other Member States the turnover shares of enterprises that are not product-specialised are greater than of those that are product-specialised for all 3 reference years.

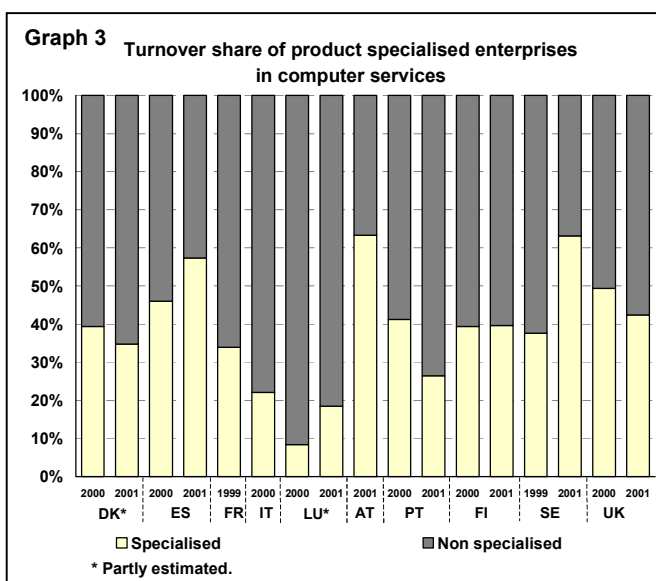


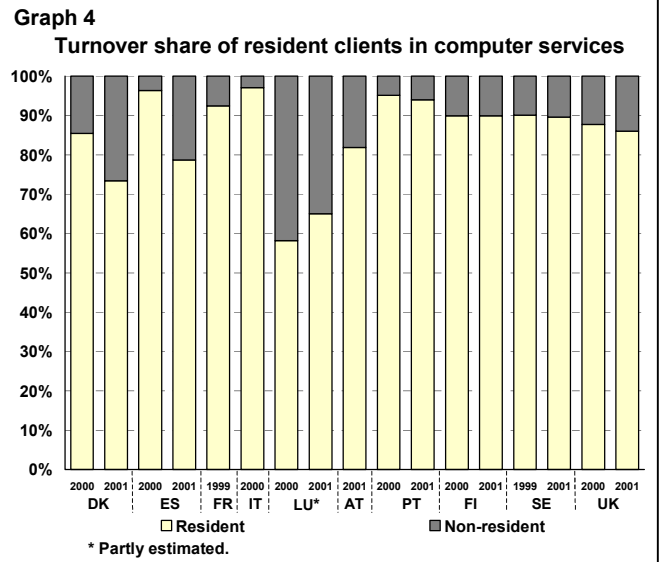
Table 1: Computer services turnover broken down by products, 2001

PRODUCTS	DK	ES	FR	LU	IT	AT	PT	FI	SE	UK
Hardware consultancy services	2.9	5.9	30.0	14.2	2.0	0.5	2.4	1.3	4.6	4.9
Software supply	44.6	37.3	31.3	37.8	39.4	62.6	31.0	54.8	75.6	47.3
Other computer services	33.0	43.4	29.4	25.0	30.2	23.1	19.4	26.0	10.5	15.9
Network and telecommunication services	5.4	1.7	0.0	4.0	2.8	0.7	1.1	2.6	1.4	2.9
Leasing or rental services	0.0	0.0	0.0	1.0	0.5	0.0	0.0	0.9	0.5	0.0
Resale	9.2	7.8	6.0	11.8	0.8	10.2	27.3	10.1	4.0	15.6
Architectural services	0.0	0.0	0.0	:	16.9	:	:	0.0	0.0	:
Engineering design services	0.0	0.0	0.0	:	7.5	:	:	0.0	0.0	:
Accounting, book-keeping and auditing services	0.0	0.0	0.0	0.0	:	:	9.8	0.0	0.0	:
Business and management consultancy services	0.0	0.0	0.0	3.7	:	0.8	:	1.9	0.7	4.2
Training services	1.6	0.8	1.9	0.7	:	1.3	1.0	0.8	0.6	0.7
Other additional products n.e.c.	3.2	3.0	1.4	1.8	:	0.7	8.1	1.7	2.1	8.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Notes: FR: 1999; IT: 2000. ES: 72.3 = 72.3 + 72.4 and 72.5 = 72.5 + 72.6; LU: 72.3 to 72.6 are confidential; AT: 72.1 and 72.3 are confidential.

Residence of clients

Data on the country of residence of clients, in addition to providing a very rough estimate of the location of clients, can naturally be compared with any data on exports of services available from other sources, thus providing an additional source and check on data that are relatively difficult to obtain. Concerning the country of residence of client enterprises, resident enterprises form the clear majority of computer services clientele. Only in Denmark, Spain and Luxembourg is the share of non-resident clients above 20% - in Luxembourg consistently during both reference years 2000 and 2001. In other countries this share is between 3% and 18%.



➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Economic Activities

Economic activities in computer services are classified using the common basis for statistical classification of economic activities within the EU: NACE Rev.1. The third level of NACE Rev.1 consists of headings identified by a three digit numerical code. Three-digit codes are called groups. Computer services, a two-digit code also called a division (72), consists of the following economic activities:

NACE group:

- 72.1: Hardware consultancy services
- 72.2: Software consultancy and supply services
- 72.3: Data processing services
- 72.4: Database services
- 72.5: Maintenance and repair services
- 72.6: Other computer related services

Product consistency

Each economic activity in computer services has its main product. The consistent combinations of economic activity and main product are defined as follows:

- NACE group 72.1: hardware consultancy services
- NACE group 72.2: Software supply, computer consultancy and systems maintenance services
- NACE group 72.3: computer facilities management and data processing

NACE group 72.4: database services

NACE group 72.5: computer hardware servicing, repair and maintenance of computing machinery

Product specialisation

An enterprise has been considered product specialised, if its most important product:

- a) is consistent with the main activity of the enterprise and
- b) comprises at least 75% of its total net turnover.

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

Symbols

- 0 Less than half the final digit shown
- : Data not available or confidential

Irish data are not analysed in this SIF, because most of the Irish data are confidential.

Further information:

➤ Databases

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