

Transport business statistics

Buses and urban railways largest employers in the passenger land transport sector

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 16/2000

SECTORIAL PROFILES

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The passenger land transport sector consists of buses and urban railways, taxis and coach charter services. Passenger transport by interurban railways is excluded (see methodological notes).

Main features on the European Union passenger land transport sector:

- Higher self-employment rate in taxi operation than in the other sub-sectors.
- Few, but large enterprises in the buses and urban railways sector.
- The turnover per person employed was the lowest within the whole transport industry.
- Passenger land transport shows a higher share of personnel costs in production compared to the other land and road transport sectors.
- The high personnel costs put a strain on operating results which also show a high disparity between Member States.
- A dominant 90% of passenger-kilometers are made by cars. Only 9% are made by buses & coaches and 1% by trams & metros.

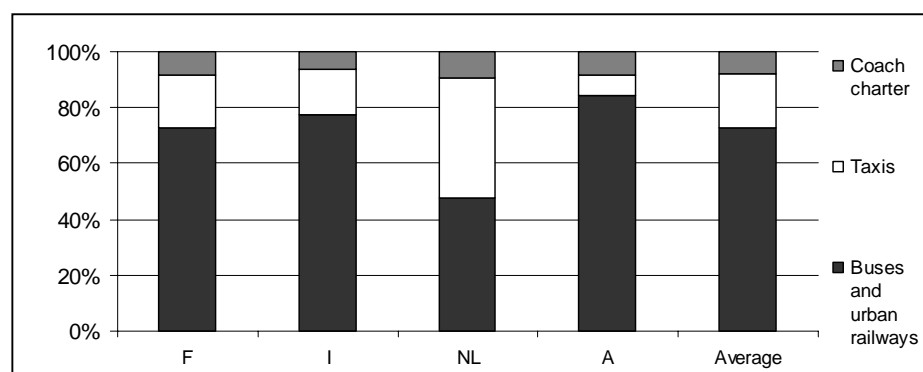


Figure 1: Distribution of persons employed in passenger land transport (various reference years, see table 2 for details)

Other relevant information highlighted:

- The use of cars increases faster than buses & coaches together with trams & metros.
- There is an average 16 buses per 10 000 persons in the EU.



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Few, but large enterprises in the buses and urban railways sector

Year	Number of enterprises				Year	Number of persons employed			
	Passenger land transport	Buses and urban railways	Taxis	Coach charter		Passenger land transport	Buses and urban railways	Taxis	Coach charter
EU 15	:	:	:	:	EU 15	:	:	:	:
B	:	:	:	:	B 1997	27974	:	:	:
DK 1996	:	262	:	:	DK 1996	:	13784	:	:
D	:	:	:	:	D	:	:	:	:
EL	:	:	:	:	EL	:	:	:	:
E (1) 1997	66911	3679	63107	3672	E (1) 1996	:	65265	:	38180
F (2) 1997	33648	1842	23624	1190	F (2) 1996	173305	118295	31012	13662
IRL	:	:	:	:	IRL	:	:	:	:
I 1996	22859	2406	17464	2989	I 1996	136011	105384	22379	8248
L 1996	176	:	:	:	L 1996	1867	:	:	:
NL (3) 1997	3085	66	3295	245	NL 1993	58295	27805	24935	5555
A (4) 1998	4187	516	2881	561	A (3) 1998	37710	67986	5907	6982
P	:	:	:	:	P	:	:	:	:
FIN 1998	9022	:	:	:	FIN 1998	24076	:	:	:
S (2) 1996	9594	988	7850	445	S	:	:	:	:
UK (5) 1997	8471	2401	4332	1679	UK	:	:	:	:

(Please note that the figures of the three subsectors, buses and urban railways, taxis and coach charter, do not always sum up to the aggregate, passenger land transport, due to various reference years shown.)

(1) Data for 60.22 and 60.23: 1996 (for 60.21: 1994)
 (2) Data for 60.21, 60.22 and 60.23: 1994
 (3) Data for 60.21, 60.22 and 60.23: 1993
 (4) Data for 60.21, 60.22 and 60.23: 1991
 (5) Data for 60.21, 60.22 and 60.23: 1996

Table 1: Enterprises population in passenger land transport

Table 2: Employment in passenger land transport

The number of enterprises in the taxi sector is high compared to the other sub-sectors. Indeed, taxi enterprises are representing 84% of the enterprises of the sector (8% and 7% respectively for buses and urban railways and coach charter). This has to be put in context to the number of persons employed: the taxi enterprises employed only 19% of the workers in the sector. On the opposite, the buses and urban railways sector is much more concentrated in employing 73% of the passenger land transport workers.

Amongst Member States where data are available, Spain and France have the largest number of enterprises, pulled up by the number of taxi enterprises. France and Italy are the countries with the highest number of persons employed.

Few Member States have business data available on taxis. In Spain there are 63 thousand enterprises, while in France there are nearly 24 thousand enterprises with 31 thousand persons employed. The Netherlands has a relatively high

number of persons employed per taxi enterprise, 7.6, while there are just 1.3 in France and Italy. Bus enterprise may also own taxis. One of the largest Dutch bus enterprises (Connexion) runs 4000 buses, but also 2500 taxis.

The Netherlands has the highest number of persons employed per bus enterprise in passenger land transport with 18.9 followed by Luxembourg (10.6) and Austria (9). Finland (2.7) has the lowest number of persons employed per company.

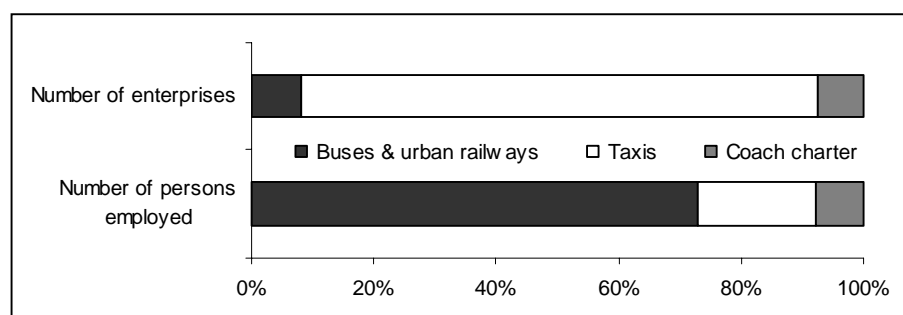


Figure 2: A sectorial comparison of the number of enterprises (E, F, I, NL, S and UK) and persons employed (F, I, NL and A)

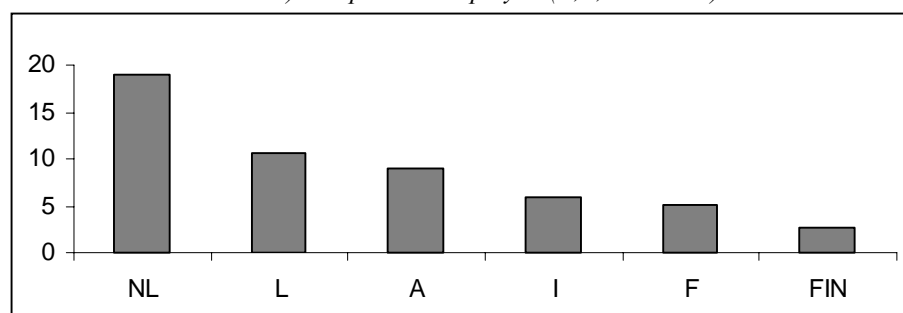


Figure 3: Number of persons employed per passenger land transport enterprise, calculated from available data, see table 1 and 2

Year	Self-employment rate			
	Passenger land transport	Buses and urban railways	Taxis	Coach charter
EU 15	:	:	:	:
B 1997	8	:	:	:
DK 1996	:	1	:	:
D	:	:	:	:
EL	:	:	:	:
E (1) 1996	:	4	:	7
F (2) 1996	16	1	77	6
IRL	:	:	:	:
I 1996	18	3	81	43
L 1996	10	:	:	:
NL 1993	6	0	13	1
A (3) 1998	11	:	0	:
P	:	:	:	:
FIN 1998	42	:	:	:
S	:	:	:	:
UK	:	:	:	:

(1) Data for 60.23: 1994

(2) Data for 60.21, 60.22 and 60.23: 1994

(3) Data for 60.22: 1991

Table 3: Self-employment rate (%)

The concentration (few and large enterprises) in buses and urban railways is confirmed by the low self-employment and may be due to the high infrastructure investments required in this business. The taxis sector shows the opposite tendency, with a high self-employment rate due to the low costs of entry.

Amongst the 6 Member States for which data are available, the wage adjusted labour productivity is

lower than in the road transport sector. This is a consequence of the higher share of personnel costs in production (see page 4). Member States with higher labour costs in production are Luxembourg (125%) and Belgium (84%). The Luxembourgish value would be lower than 100% if the personnel costs were divided by the turnover instead.

The unit labour costs in the passenger land transport sector indicate 3 relatively low labour cost countries: the

Year	Unit labour costs (1000 ECU)	Wage adjusted labour productivity (%)
EU 15	:	:
B (1) 1997	33	111
DK	:	:
D	:	:
EL	:	:
E	:	:
F 1996	33	76
IRL	:	:
I 1996	36	96
L 1996	35	117
NL 1997	:	:
A (2) 1998	24	128
P	:	:
FIN (2) 1998	24	107
S 1996	31	:
UK 1996	:	:

(1) Unit labour costs: 1996

(2) Unit labour costs: 1997

Table 4: Unit labour costs and labour productivity in passenger land transport

United Kingdom, Austria and Finland.

France and Sweden were two Member States with higher personnel costs than value added. This was shown by the low wage adjusted labour productivity for France (76%). The relatively low figure for Italy (96%), but also for France were due to adjustments of the self-employment rate (18% and 16% respectively).

The turnover per person employed is the lowest for the whole transport industry

Year	Turnover per person employed (Mio ECU)	Turnover per person employed (1000 ECU)
EU 15	:	:
B 1997	1016	36
DK	:	:
D	:	:
EL	:	:
E	:	:
F 1996	7903	46
IRL	:	:
I 1996	3465	30
L 1996	66	36
NL (1) 1997	1670	28
A 1998	1624	43
P	:	:
FIN 1998	1150	48
S 1996	3285	:
UK 1997	6717	:

(1) Number of persons employed: 1993

Table 5: Turnover in passenger land transport

The data available for the subsectors, provided by France, Italy, the Netherlands and the United Kingdom, show the heavy weight of the buses and urban railways sector. Its turnover represents 72% of the passenger land transport sector to 15% for taxis and 13% for coach charter.

Turnover data for the passenger land transport sector, the aggregate of the three subsectors, are provided by 9 Member States. The Member States with the highest turnover per person employed are Finland (48 thousand ECU) and France (46 thousand

ECU). The Netherlands (28 thousand ECU) and Italy (30 thousand ECU) have the lowest results. However, the other operating ratios will show other scales (see page 4).

The average turnover per person employed, amongst the 7 Member States with data available, is 37 thousand ECU. It was the lowest figure for the whole transport industry. For instance, the road haulage and the air transport industry achieved greater results: 77 thousand ECU and 175 thousand ECU in 1995.

High personnel costs put a strain on operating results

One of the major feature of the passenger land transport sector is its high level of personnel costs which are indeed higher than in the land and road transport sectors. This can be shown with the ratio personnel costs in production: except for Austria (59% in land transport) and the Netherlands (112% in road transport), all available Member States show that this ratio is higher than in land and road transport. This comes from the situation in the buses and urban railways sub-sector: the personnel costs in production reached 62% to 24% in taxis and 30% in coach charter.

Luxembourg and the Netherlands have a value added in production value that is higher than 100%. This is explained by large operating subsidies in the buses and urban railways sector.

Year	Gross operating rate (%)				VA in production value (%)			
	Passenger land transport	Buses and urban railways	Taxis	Coach charter	Passenger land transport	Buses and urban railways	Taxis	Coach charter
EU 15	:	:	:	:	:	:	:	:
B (1) 1997	17	:	:	:	101	:	:	:
DK (2) 1996	:	-27	:	:	:	23	:	:
D	:	:	:	:	:	:	:	:
EL	:	:	:	:	:	:	:	:
E 1996	:	:	:	19	:	:	:	61
F (3) 1996	-6	6	49	10	52	72	62	51
IRL	:	:	:	:	:	:	:	:
I 1996	20	15	44	20	72	76	61	43
L 1996	26	:	:	:	162	:	:	:
NL 1997	32	50	21	15	105	160	68	55
A 1998	22	:	:	:	74	:	:	:
P	:	:	:	:	:	:	:	:
FIN 1998	33	:	:	:	66	:	:	:
S (1,4) 1996	-8	16	10	:	25	55	39	:
UK (1,5) 1997	19	18	30	27	59	60	52	51

(1) VA in production value: turnover is used instead of production value

(2) VA is at basic prices

(3) VA for 60.21, 60.22 and 60.23 are at basic prices, data for 60.21, 60.22 and 60.23: 1994

(4) Data for 60.21 and 60.22: 1994

(5) VA for 60.21, 60.22 and 60.23 are at basic prices, data for 60.21, 60.22 and 60.23: 1996

Table 6: Gross operating rate and value added in production value (%)

Year	VA at factor cost (mio ECU)				Personnel costs (mio ECU)				Gross operating surplus (mio ECU)				Share of personnel costs in production (%)			
	Passenger land transport	Buses and urban railways	Taxis	Coach charter	Passenger land transport	Buses and urban railways	Taxis	Coach charter	Passenger land transport	Buses and urban railways	Taxis	Coach charter	Passenger land transport	Land transport	Road transport	
EU 15	:	:	:	:	:	:	:	:	:	:	:	:	EU 15	:	:	
B (1) 1997	1030	:	:	:	856	:	:	:	175	:	:	:	B (7,8)	84	52	31
DK (2) 1996	:	160	:	:	:	346	:	:	:	-186	:	:	DK (8)	:	:	26
D	:	:	:	:	:	:	:	:	:	:	:	:	D	:	:	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	EL	:	:	:
E (3) 1996	:	1921	:	1076	:	1413	:	705	:	508	:	371	E	:	:	:
F (4) 1996	4350	4137	532	359	4851	3762	111	278	-501	375	421	81	F	58	46	37
IRL	:	:	:	:	:	:	:	:	:	:	:	:	IRL	:	:	:
I 1996	4698	4173	281	244	4016	3807	73	136	682	365	208	108	I	61	35	24
L 1996	76	:	:	:	59	:	:	:	17	:	:	:	L	125	59	43
NL 1997	1739	1137	444	159	1207	793	299	116	531	343	145	43	NL (7,9)	73	43	112
A 1998	1181	:	:	:	823	:	:	:	359	:	:	:	A (10)	52	59	40
P 1997	:	:	:	:	:	:	:	:	:	:	:	:	P	:	28	:
FIN 1998	839	:	:	:	458	:	:	:	381	:	:	:	FIN (10)	36	33	29
S (1,5) 1996	823	1014	231	:	1087	727	172	:	-264	286	59	:	S	33	27	27
UK (1,6) 1997	3936	2624	482	413	2645	1844	200	195	1291	779	281	218	UK (7,11)	39	27	28

(1) Share of personnel costs in production: turnover is used instead of production value

(2) VA is at basic prices

(3) Data for 60.23: 1994

(4) VA for 60.21, 60.22 and 60.23 are at basic prices, data for 60.21, 60.22 and 60.23: 1994

(5) Data for 60.21 and 60.22: 1994

(6) VA for 60.21, 60.22 and 60.23 are at basic prices, data for 60.21, 60.22 and 60.23: 1996

(7) Land transport: 1996

(8) Road transport: 1995

(9) Land transport: 1995

(10) Road and land transport: 1997

(11) Road transport: 1996

Table 7: Value added at factor cost, personnel costs, gross operating surplus and share of personnel costs in production for passenger land transport

The high figures on personnel costs put a strain on operating results and the first operating balance is even negative for two Member States: France and Sweden (-501 and -264 Mio ECU). An inter-sectoral comparison shows that the gross operating rate is lower in passenger land transport than in road transport as a whole (10% compared to 14%).

These operating ratios also shows a great disparity between Member States. The Netherlands and Finland show the highest rates (32% and 33%) while France and Sweden show very low rates (-6% and -8%). These discrepancies can be explained by the heterogeneous passenger land transport market (compared for example to the integrated road haulage market).

especially buses and urban railways, where the infrastructure costs are high.

Indeed, for the four Member States that provide investment data for the three subsectors, the investment in tangible goods in buses and urban railways represented four fifths of the total investment in the passenger land transport sector.

The average investment rate for the passenger land transport (calculated with available data) is 28% which is in the same range as road transport (26%) and land transport (29%).

Member States that have the highest investment rates are Austria (51%) and Sweden (50%). It means that half of the wealth created has been reinvested.

Year	Investment (mio ECU)	Investment rate (%)
EU 15	:	:
B	:	:
DK	:	:
D	:	:
EL	:	:
E	:	:
F 1996	1506	35
IRL	:	:
I 1996	1001	21
L 1995	16	21
NL 1997	504	29
A 1998	600	51
P	:	:
FIN 1998	240	29
S 1996	414	50
UK (1) 1996	691	18

(1) VA is at basic prices

Investment figures are crucial for a better comprehension of this sector,

Table 8: Investment and investment rate in the passenger land transport sector

The domination and the increasing share of cars in traffic

Source: Eurostat, Milieu database

The use of cars are dominating in traffic, with 90% of the passenger-kilometres in the EU. Only 9% are made by buses & coaches and 1% by trams & metros.

However, it is also noted that some Member States have a greater use of public transport services. This is shown when comparing the share of the demand of land transport (except railways) expressed in Pkm (passenger-kilometres) per capita.

Only four Member States are above the average of 1% for the share of use of trams and metros: Austria (1.9), Sweden (1.5), France (1.4) and Spain (1.2). Portugal is at 0.4%.

The share of the use of buses and coaches is more important (10%). Three Member States stand out in the group: Greece (24%), Denmark (15%) and Austria (15%). In view of the relative importance of this type of vehicles these three Member States are also these that had less recourse

	[in mio passenger-kilometres]			[% of total passenger-kilometres]			[in Pkm per capita]		
	Trams & metros	Buses & coaches	Passenger cars	Trams & metros	Buses & coaches	Passenger cars	Trams & metros	Buses & coaches	Passenger cars
EU 15	41 737	385 414	3 785 179	0.99	9.15	89.86	112	1 031	10 129
EUR-11	32 787	301 119	2 938 300	1.00	9.20	89.80	113	1 038	10 125
B	800	11 500	94 000	0.75	10.82	88.43	79	1 129	9 232
DK	0	11 400	65 000	0.00	14.92	85.08	0	2 164	12 337
D	8 300	68 000	745 300	1.01	8.28	90.71	101	828	9 070
EL	750	20 695	64 379	0.87	24.11	75.01	71	1 968	6 121
E	4 570	38 500	350 000	1.16	9.79	89.04	116	980	8 904
F	10 000	42 000	685 100	1.36	5.70	92.95	171	718	11 716
IRL	0	5 500	45 000	0.00	10.89	89.11	0	1 529	12 509
I	5 300	87 000	635 000	0.73	11.96	87.31	93	1 518	11 077
L	0	419	4 800	0.00	8.04	91.96	0	1 002	11 467
NL	1 400	14 600	151 200	0.84	8.73	90.43	90	937	9 702
A	1 500	12 500	67 000	1.85	15.43	82.72	186	1 547	8 293
P	500	13 100	109 000	0.41	10.69	88.91	50	1 319	10 972
FIN	417	8 000	51 900	0.69	13.26	86.05	81	1 559	10 113
S	1 400	9 000	85 000	1.47	9.43	89.10	158	1 016	9 596
UK	6 800	43 200	632 500	1.00	6.33	92.67	116	734	10 746

Table 9: Passenger land transport intensity compared to passenger cars intensity [1997] (See methodological notes for details about the terminology used)

to cars: 75% for Greece, 83% for Austria and 85% for Denmark.

In Greece it is due to the preferred

use of buses, with their high scheduled traffic intensity and low fares. The spending on cars is relatively low in Greece as well.

Comparing to the slow growth of the intensity of use of the public transport services (0,36% for trams and metros in 5 years and 1,73% for buses and coaches in 8 years), the increase for passenger cars is huge (more than 10% in 8 years).

Portugal and Greece are the Member States that have seen the use of passenger cars the most increased (+67% and +27% between 1990 and 1997).

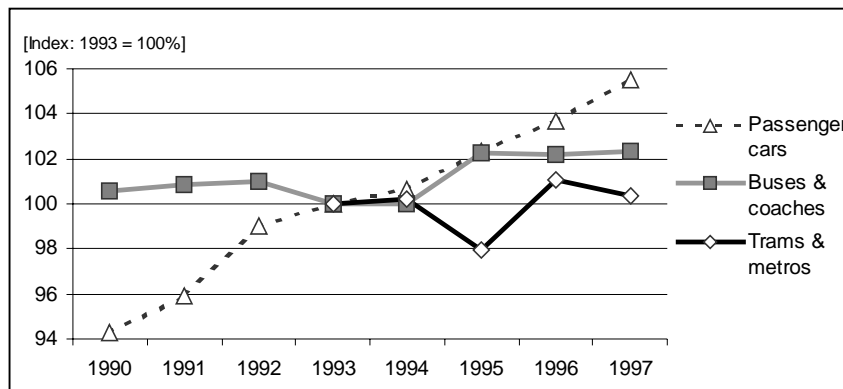
Among the Member States that have increased the use of buses and coaches, we find Austria and Ireland (in both cases, +37% between 1990 and 1997).

On the opposite, Germany and the United Kingdom show a decrease in their use of buses and coaches services (-10% and -8% in the same period).

	[passenger-kilometers per capita]			[index: 1993 = 100%]		
	Trams & metros	Buses & coaches	Passenger cars	Trams & metros	Buses & coaches	Passenger cars
1990	:	1 014	9 053	:	101	94
1991	:	1 017	9 204	:	101	96
1992	:	1 018	9 502	:	101	99
1993	111	1 008	9 600	100	100	100
1994	112	1 008	9 660	100	100	101
1995	109	1 031	9 826	98	102	102
1996	113	1 030	9 951	101	102	104
1997	112	1 031	10 129	100	102	106

Source: Eurostat, Milieu database

Table 10: Evolution of the intensity of public transport services compared to passenger cars



Source: Eurostat, Milieu database

Figure 4: Evolution of the intensity of public transport services compared to passenger cars (index: 1993 = 100%)

16 buses per 10 thousand persons on average in the European Union

The number of buses per capita was heterogeneous. The Netherlands and France had 7 buses per 10 thousand persons in 1996 while Denmark, the United Kingdom, Greece and Luxembourg reached more than 20 buses per 10 thousand persons i.e. 11 buses above the average.

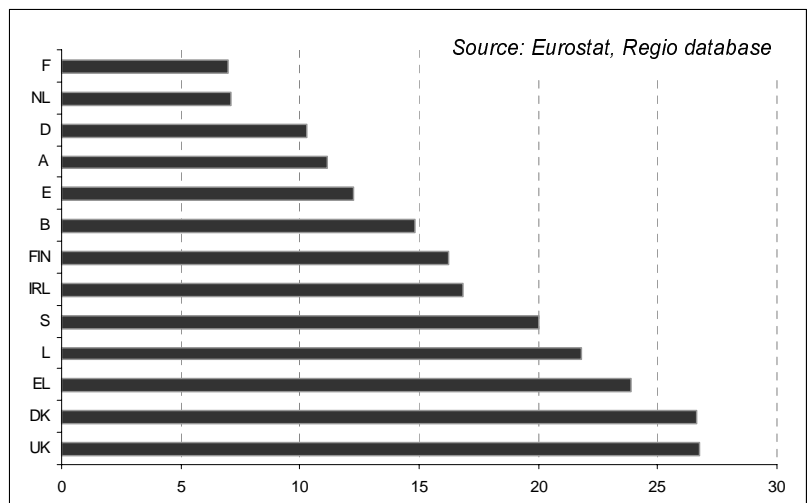
Source: Eurostat, Regio database

	Number of buses	Number of buses per 10000 capita
B	15000	15
DK	14000	27
D	84000	10
EL	25000	24
E	48000	12
F	40600	7
IRL	6100	17
I	:	:
L	900	22
NL	11000	7
A	9000	11
P	:	:
FIN	8300	16
S	17700	20
UK	157000	27

Table 11: Number of buses in 1996

In this respect, it is normal to find Denmark and Greece above the average, which is at 16 buses per 10 thousand persons, because of their high level of use of buses and coaches, as it has been shown above (see page 5).

Although the United Kingdom show the highest number of buses per capita in the European Union, they have the second lowest usage rate of buses and coaches (734 passenger-kilometres per capita). This paradox is a consequence of the small size of the buses and their low passenger capacity.



Source: Eurostat, Regio database

Figure 5: Number of buses per 10000 capita in 1996

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Databases used

Data is extracted from NewCronos, the reference database of Eurostat. This Statistics in focus is based on the annual enterprise statistics (DFT file: enter) being a part of the Structural Business Statistics domain.

Data was also extracted from other Eurostat domains: Theme 1, domain regio, collection tran (number of buses) and Theme 8, domain milieu, collection term, group termd (passenger transport).

60.2A 'Passenger land transport'

This is a sum of three sectors in the NACE Rev. 1 – the statistical classification of economic activities. It is at 4-digit level. These groups include:

60.2A =

60.21 ('Other scheduled passenger land transport' or the popular term used here: **'buses & urban railway'**) +

60.22 ('Taxi operation' or the popular term used here: **'taxis'**) +

60.23 ('Other land passenger transport' or the popular term used here: **'coach charter'**).

Examples of activities:

(sub)urban transport of passengers on scheduled routes carried out with motor bus, tramway, street car, trolley-bus, underground and elevated railways, etc; interurban transport, except by rail, of passenger on scheduled routes; operation of school buses, town-to-airport/station lines, funicular railways, aerial cable-ways, etc.

Taxi operation also includes other rental of private cars with operator.

Other land passenger transport includes other non-scheduled passenger road transport, charters, excursions and other occasional coach services.

NACE coverage

'Transport by railways' NACE code **60.1 is excluded** because it includes both passenger and freight transport by interurban railways.

'Road haulage' NACE code **60.24 is also excluded**. Though it is a part of NACE group 60.2, 'road haulage' only includes freight transport operation by road.

Download NACE Rev. 1 from the web: http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/classifications/nace_en.pdf

'Trams & metros', 'Buses & coaches' and '(Passenger) cars'

Definitions used are taken from the MILIEU database. For this reason, the urban railways ('Trams & metros') are isolated from the buses while those types of vehicles are grouped in the same NACE code (60.21). Similarly, the public transport vehicles ('Buses & coaches') are grouped together while they belong to two different NACE code (60.21 and 60.23).

11 11 0 Number of enterprises

A count of the non-dormant number of enterprises registered to the population concerned in the business statistics register. This variable refers to all enterprises producing either a market or non-market output.

12 11 0 Turnover

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

12 12 0 Production value

The production value is defined as turnover, +/- the changes in stocks of finished products, work in progress and goods and services purchased for resale, - the purchases of goods and services for resale, + capitalised production and other operating income (excluding subsidies).

12 14 0 Value added at basic prices

Value added at basic prices is calculated from the production value plus subsidies on products less the purchases of goods and services (other than those purchased for resale in the same condition) plus or minus the changes in stocks of raw materials and consumables. Value added at basic prices is calculated as follows: Turnover - Purchases of goods and services +/- Change in stocks of goods and services + Capitalised production + Operating subsidies linked to products.

12 15 0 Value added at factor cost

Value added at factor cost is calculated by adjusting value added at basic prices for operating subsidies linked to production and duties and taxes linked to production. Value added at factor cost is calculated as follows: Value added at basic prices + Operating subsidies linked to production - Duties and taxes linked to production.

12 17 0 Gross operating surplus

Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the

personnel costs. It is the balance available to the unit which allows it to recompense the providers of own funds and debt, to pay taxes and eventually to finance all or a part of its investment.

13 31 0 Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions. Personnel costs can be calculated as follows: Wages and salaries + Social security costs

16 13 0 Number of employees

This heading is defined as a count of the number of employees. Employees are defined as all persons who, by agreement, work for another resident institutional unit and receive remuneration.

Self-employed person

Self-employed persons are defined as persons who are the sole owners, or joint owners, of the unincorporated enterprise in which they work.

Self-employment rate

The self-employment rate equals the number of self-employed persons divided by the number of persons employed.

16 11 0 Number of persons employed

This covers all persons – both employed and self-employed.

91 11 0 Per capita productivity

This is "Value added at factor cost" / "Number of persons employed".

91 12 0 Wage adjusted labour productivity

This is gross value added per unit personnel cost: ("Value added at factor cost" / "Personnel costs") × ("Number of employees" / "Number of persons employed").

91 21 0 Unit labour cost

This is labour costs per employee: "Personnel costs" / "Number of employees".

92 11 0 Gross operating rate

It is calculated as: "Gross operating surplus" / "Turnover".

92 11 3 investment rate

The investment rate is calculated as: "investment"/"value added at factor cost".

Please find more information on the web: http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/coded/en/all_bussiness.htm

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