

SMEs in the candidate countries

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What are SMEs?

On 6 May 2003 the Commission adopted a new Recommendation 2003/361/EC regarding its definition of SMEs. The revision took account of economic developments since 1996 and reduced the possibility of the definitions circumvention, particularly with regard to state aid, Structural Funds and the Research and Development Framework Programme. The increase of the financial ceilings was designed to avoid penalising enterprises that invest.

- Micro-enterprises: less than 10 employees and with an annual turnover or a balance sheet total of no more than EUR 2 million;
- Small enterprises: less than 50 employees and with either an annual turnover or a balance sheet total of no more than EUR 10 million;
- Medium-sized enterprises: less than 250 employees and with either an annual turnover of no more than EUR 50 million or a balance sheet total of no more than EUR 43 million.

Main indicators

In the business economies (NACE Sections C to I and K) of 9 of the 13 candidate countries (excluding Cyprus, Malta, Bulgaria and Turkey), there were an estimated 2.7 million enterprises in 2001.

Manufacturing enterprises (NACE Section D) accounted for just 91 400 of these enterprises, but for 47 % of total employment and 37 % of total value added among a set of 7 candidate countries for which are available (as shown in figure 1).

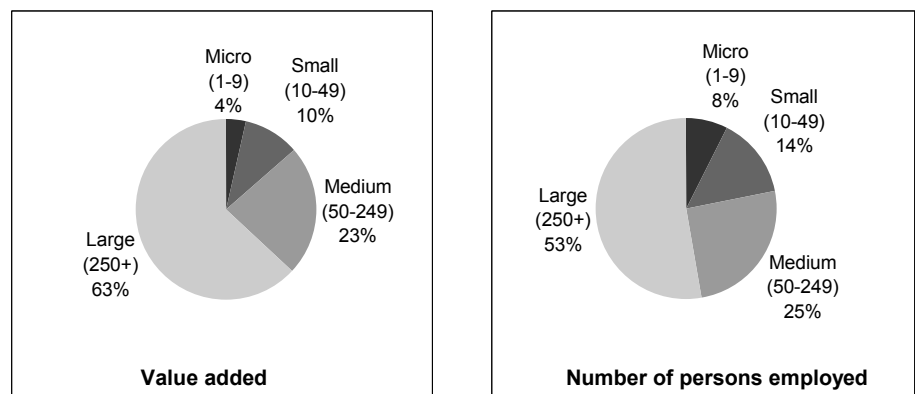


Figure 1: Breakdown of value added and number of persons employed by enterprise size class in 7 of the candidate countries, manufacturing (NACE Section D), 2001 (% share of total)

Based on data for CZ, EE, LV, LT, HU, SK and RO.

The share of micro, small and medium-sized enterprises in the total number of persons employed was higher than the corresponding share of these enterprises in total value added. Micro enterprises employed 8 % of the total number of persons employed in manufacturing, while generating 4 % of total value added. The share of the total number of persons employed in small and medium-sized enterprises was 4 and 2 percentage points higher than corresponding shares of value added. Large enterprises employed 53 % of persons employed in manufacturing, while generating 63 % of value added.

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 5/2004

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The table below provides an overview of some general economic indicators for the candidate countries, which are mainly derived from national accounts and the labour force survey. These indicators provide a basis for analysing the tables and graphs that follow. For example, while the population of the candidate countries represented approximately 45 % of total EU-15 population in 2003 (including an estimate for Turkey), their relative share of GDP in the EU in 2002 was about 7 %. Unemployment rates across the candidate countries ranged from 4 % in Cyprus to 19 % in Poland for those countries where data are available, while the share of females in the total labour force in the first quarter of 2003 was consistently between 44 % and 50 %.

The share of value added coming from industry in the candidate countries in 2002 was higher than in the EU in all countries except Cyprus and Latvia. The same pattern could be observed for the agricultural sector, which was relatively more important in each candidate country (in particular, in Bulgaria, Romania and Turkey), where this sector accounted for in excess of 10 % of total value added. Construction was also relatively more important in the majority of the candidate countries, except Malta, Bulgaria and Turkey.

	EU-15	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO (3)	TR
Population as of 1 January 2003 (thousands)	378 988	10 203	1 356	805	2 332	3 463	10 152	397	38 214	1 995	5 379	7 846	21 812	:
Labour force, Q2-2003 (thousands) (1)	162 974	4 703	589	327	999	1 473	3 924	:	13 657	896	2 167	2 876	:	:
Share of women in total labour force, Q2-2003 (%) (1)	43.1	43.7	48.9	44.3	48.9	49.6	45.7	:	45.7	45.6	45.6	46.9	:	:
Unemployment rate, Q2-2003 (%) (2)	7.6	7.5	10.7	4.1	10.6	12.9	5.8	:	19.4	6.5	17.1	13.7	8.1	:
GDP at market prices, 2002 (EUR billion)	8 476	68	6	10	8	13	61	3	175	21	23	15	44	199
% of gross value added at basic prices in agriculture, 2002 (NACE Sections A and B)	2.0	3.7	5.4	4.1	4.7	7.1	3.7	2.8	3.2	3.0	4.5	12.5	13.0	11.5
% of gross value added at basic prices in industry, 2002 (NACE Sections C to E)	21.5	31.9	22.8	12.4	18.6	24.1	25.2	25.0	23.9	29.6	26.4	23.4	32.1	24.5
% of gross value added at basic prices in construction, 2002 (NACE Section F)	5.5	6.6	6.6	7.9	6.1	6.4	5.6	3.1	6.6	5.6	5.4	4.4	5.5	4.0
% of gross value added at basic prices in services, 2002 (NACE Sections G to K)	48.8	42.4	47.3	52.0	51.4	43.9	42.3	40.1	45.6	41.2	48.0	44.5	49.4	46.1
% of gross value added at basic prices in other services, 2002 (NACE Sections L to P)	22.2	15.5	18.0	23.6	19.2	18.5	23.3	29.0	20.8	20.6	15.7	15.2	:	14.0
Central bank official deposit rate, 2002 (%)	:	1.8	:	2.5	2.0	:	7.5	0.8	4.8	4.0	5.0	:	5.0	:
Consumer price index, rate of change, 2002 (%)	:	1.4	3.6	2.8	2.0	0.4	5.2	:	1.9	7.5	3.3	5.8	22.5	:
Exchange rate to EURO, 2002 (1 EUR=...)	:	30.804	15.647	0.5753	0.5810	3.4594	242.96	0.4089	3.8574	225.98	42.694	1.9492	31 270	1 439 680
International trade in goods and services relative to GDP, 2002 (%)	74	143	200	117	114	126	150	209	73	129	167	128	85	57
Cover rate of trade in goods and services, 2002 (%)	105	97	90	88	81	90	97	99	90	103	91	89	86	94

Table 1: Main indicators for the candidate countries, latest year available

(1) EU-15, Q2-2002. (2) EU-15 and RO, Q2-2002. (3) RO, % of gross value added was calculated on the basis of available data, excluding other services from the calculation.

Number of enterprises, turnover, value added and employment

	EU-15	CZ	EE	CY	LV	LT	HU	MT	PL (1)	SI	SK	BG	RO	TR
Total number of enterprises (thousands)	13 447	742	29	:	36	58	56	:	1 417	71	37	:	300	:
Of which														
Micro (%)	90.6	94.6	78.5	:	76.9	81.5	51.0	:	96.5	91.0	:	:	:	:
Small (%)	7.9	4.4	17.8	:	18.9	14.9	40.2	:	2.4	:	23.4	:	9.9	:
Medium (%)	1.2	0.9	3.3	:	3.7	3.2	:	:	0.9	:	5.2	:	2.6	:
Large (%)	0.2	0.2	0.5	:	0.5	0.4	:	:	0.2	:	:	:	:	:
Turnover (EUR billion)	16 292	185	18	:	18	22	121	:	409	44	47	:	77	:
Of which														
Micro (%)	18.4	19.6	23.3	:	:	13.7	7.6	:	28.2	20.0	:	:	:	:
Small (%)	19.2	20.6	31.0	:	:	:	20.5	:	13.5	:	19.0	:	20.0	:
Medium (%)	18.9	:	:	:	:	:	:	:	21.3	:	21.5	:	19.9	:
Large (%)	43.5	:	:	:	:	:	:	:	37.0	:	:	:	:	:
Value added (EUR billion)	4 309	34	3	:	6	4	23	:	147	9	9	:	17	:
Of which														
Micro (%)	20.1	:	16.4	:	:	10.0	6.2	:	25.4	20.7	:	:	:	:
Small (%)	19.0	16.0	25.8	:	:	:	15.7	:	10.7	:	14.9	:	12.9	:
Medium (%)	17.9	:	:	:	:	25.4	:	:	18.6	:	17.4	:	21.1	:
Large (%)	43.0	:	:	:	:	:	:	:	45.3	:	:	:	:	:
Employment (thousands)	96 736	3 535	356	:	496	699	1 665	:	7 022	:	942	:	3 987	:
Of which														
Micro (%)	27.7	31.2	21.5	:	:	20.8	10.4	:	:	:	:	:	:	:
Small (%)	21.5	18.3	28.6	:	:	:	21.7	:	:	:	16.4	:	14.9	:
Medium (%)	16.3	:	:	:	:	25.5	:	:	:	:	21.6	:	20.9	:
Large (%)	34.5	:	:	:	:	:	:	:	:	:	:	:	:	:

Table 2: Breakdown of main indicators by enterprise size class (NACE Sections C to I and K), 2001

(1) Shares for total number of enterprises, turnover and value added refer to 2000.

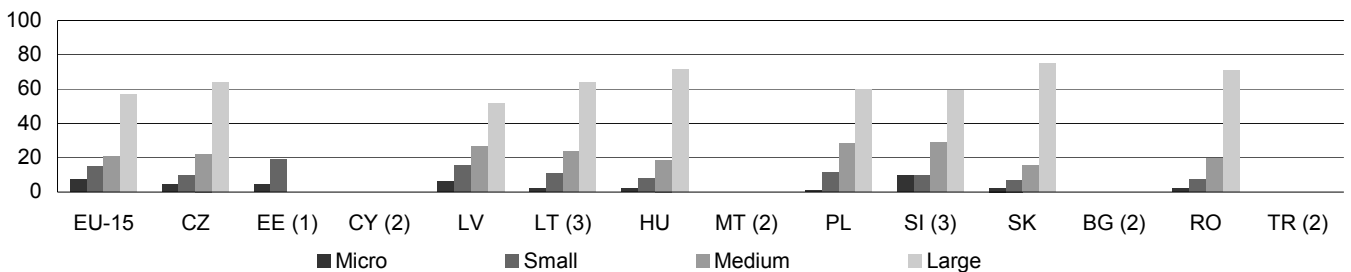


Figure 2: Breakdown of value added at factor cost by enterprise size class, manufacturing and energy (NACE Sections D and E), 2001 (% share of total)

(1) Not available for medium-sized and large enterprises. (2) Not available. (3) 2000.

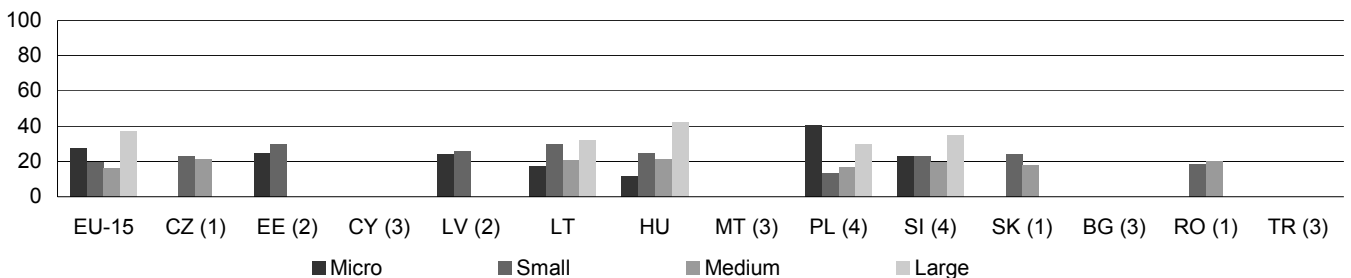


Figure 3: Breakdown of value added at factor cost by enterprise size class, services sector (NACE Sections G to I and K), 2001 (% share of total)

(1) Not available for micro and large enterprises. (2) Not available for medium-sized and large enterprises. (3) Not available. (4) 2000.

Gross investment and personnel costs

	EU-15	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO	TR
Gross investment in tangible goods (EUR million)														
Mining and quarrying	:	267	19	:	5	31	25	:	725	29	66	:	1 352	:
Micro (%)	:	0	8	:	:	1	1	:	7	1	1	:	0	:
Small (%)	:	2	8	:	:	15	24	:	4	:	1	:	0	:
Medium (%)	:	:	:	:	:	84	:	:	:	:	83	:	1	:
Large (%)	:	:	:	:	0	0	:	:	:	:	15	:	98	:
Manufacturing	:	4 734	288	:	383	427	3 137	:	6 315	1 062	1 717	:	3 417	:
Micro (%)	:	4	7	:	5	5	2	:	5	1	2	:	6	:
Small (%)	:	8	21	:	20	14	10	:	8	10	5	:	9	:
Medium (%)	:	21	35	:	41	26	19	:	27	26	13	:	25	:
Large (%)	:	67	37	:	34	55	69	:	60	62	80	:	60	:
Electricity, gas and water supply	:	1 229	125	:	190	214	675	:	2 503	262	504	:	4 351	:
Micro (%)	:	1	2	:	1	1	0	:	4	0	0	:	0	:
Small (%)	:	4	9	:	9	:	1	:	1	:	1	:	0	:
Medium (%)	:	6	:	:	4	7	6	:	12	59	2	:	0	:
Large (%)	:	89	:	:	86	:	92	:	84	:	97	:	99	:
Construction	:	513	36	44	69	68	534	:	992	:	77	:	681	:
Micro (%)	:	35	20	34	8	:	66	:	25	:	15	:	10	:
Small (%)	:	21	37	22	30	:	16	:	31	:	26	:	8	:
Medium (%)	:	22	33	24	43	:	10	:	29	:	27	:	20	:
Large (%)	:	21	10	20	18	:	8	:	15	:	33	:	62	:
Personnel costs (EUR million)														
Mining and quarrying	15 520	516	41	14	8	17	66	:	:	104	76	:	886	:
Micro (%)	:	0	1	7	:	1	1	:	:	3	1	:	0	:
Small (%)	:	3	8	:	:	18	14	:	:	:	4	:	0	:
Medium (%)	:	:	:	:	:	82	:	:	:	:	18	:	1	:
Large (%)	:	:	:	:	0	0	:	:	:	:	77	:	98	:
Manufacturing	952 617	8 337	614	553	576	893	5 472	:	:	3 218	2 148	:	3 948	:
Micro (%)	:	5	5	27	4	3	3	:	:	9	3	:	2	:
Small (%)	:	14	21	31	14	13	11	:	:	12	10	:	7	:
Medium (%)	:	27	41	:	32	27	24	:	:	29	23	:	18	:
Large (%)	:	54	34	:	50	57	63	:	:	50	64	:	73	:
Electricity, gas and water supply	:	635	73	51	111	197	697	:	:	217	324	:	777	:
Micro (%)	:	1	3	:	1	0	1	:	:	0	0	:	0	:
Small (%)	:	5	17	:	6	:	2	:	:	:	2	:	0	:
Medium (%)	:	13	:	:	12	13	11	:	:	58	4	:	4	:
Large (%)	:	82	:	:	81	:	87	:	:	:	94	:	96	:
Construction	241 980	1 771	152	495	140	230	682	:	:	658	350	:	800	:
Micro (%)	24	17	10	36	9	4	12	:	:	25	12	:	3	:
Small (%)	36	32	35	20	29	19	30	:	:	:	26	:	14	:
Medium (%)	19	27	38	14	40	54	34	:	:	:	31	:	35	:
Large (%)	21	23	16	30	22	23	24	:	:	:	31	:	49	:

Table 3: Gross investment in tangible goods and personnel costs by enterprise size class, 2001

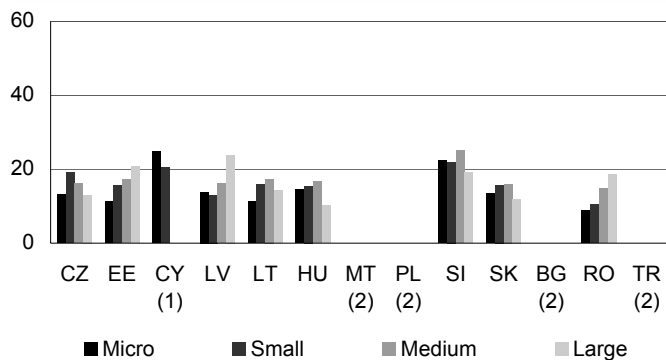


Figure 4: Personnel costs as a share of total operating costs by enterprise size class, manufacturing (NACE Section D), 2001 (%)
 (1) Not available for medium-sized and large enterprises.
 (2) Not available.

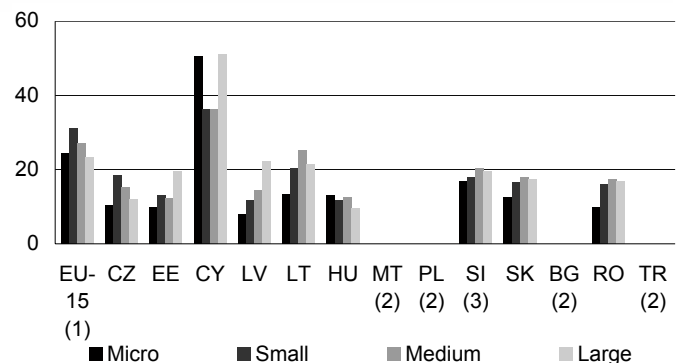


Figure 5: Personnel costs as a share of total operating costs by enterprise size class, construction (NACE Section F), 2001 (%)
 (1) 2000. (2) Not available. (3) 1999.

Labour indicators

Apparent labour productivity and average personnel costs per employee were considerably lower in the manufacturing sectors of the candidate countries than in the EU. Large enterprises in the candidate countries tended to be significantly more productive, whereas there was somewhat less variation of personnel costs between the four different size-classes (see table 4). Across the candidate countries, small, medium-sized and large enterprises showed a similar repartition of salary composition between employer and employee contributions and direct remuneration.

	EU-15	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO	TR
Apparent labour productivity (thousand EUR per person employed)														
Total	51.2	10.7	8.0	25.0	10.6	5.5	15.3	:	19.1	:	9.3	:	3.8	:
Micro	29.6	3.7	5.0	18.3	10.0	1.7	7.6	:	:	:	6.8	:	2.1	:
Small	37.9	7.3	6.8	24.4	8.3	3.2	8.2	:	:	:	7.5	:	2.9	:
Medium	47.3	10.3	9.4	:	10.3	5.3	11.8	:	:	:	7.0	:	3.7	:
Large	66.9	14.4	8.2	:	12.3	7.8	19.9	:	:	:	10.9	:	4.2	:
Personnel costs (thousand EUR per employee)														
Total	33.6	6.0	5.0	14.9	3.7	3.6	7.2	:	:	:	5.1	:	2.2	:
Micro	:	2.2	2.9	11.6	2.0	1.1	4.3	:	:	:	3.8	:	1.0	:
Small	:	5.4	4.3	14.6	2.4	2.1	4.8	:	:	:	4.4	:	1.4	:
Medium	:	6.3	5.9	:	3.6	3.4	6.7	:	:	:	4.7	:	1.7	:
Large	:	7.2	5.1	:	5.0	5.2	8.5	:	:	:	5.5	:	2.6	:

Table 4: Apparent labour productivity and personnel costs by enterprise size class, manufacturing (NACE Section D), 2001

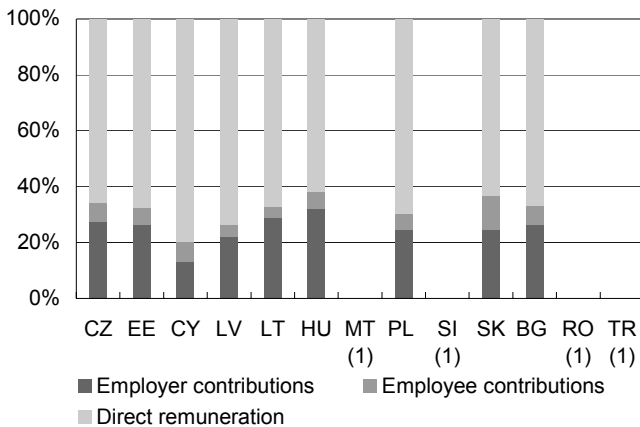


Figure 6a: Composition of labour costs among small enterprises (NACE Sections C to K), 2000 (%)

(1) Not available.

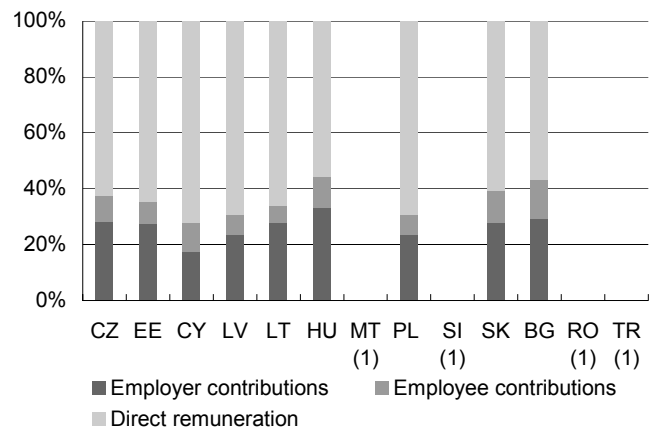


Figure 6c: Composition of labour costs among large enterprises (NACE Sections C to K), 2000 (%)

(1) Not available.

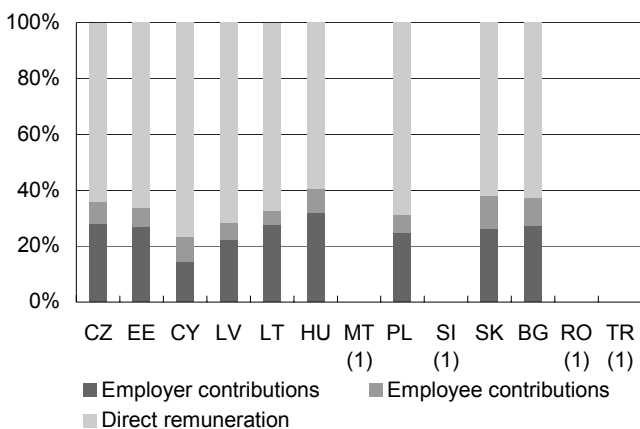


Figure 6b: Composition of labour costs among medium-sized enterprises (NACE Sections C to K), 2000 (%)

(1) Not available.

Training

Results compiled from the Continuing Vocational Training Survey show that, on average, large enterprises provided more training than small or medium-sized enterprises to their staff. Large enterprises were also more likely to provide CVT courses, have a company training plan, and to assess the futures skills and training needs of their staff.

	EU-15	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO	TR
Any type of training														
Total	62	69	63	:	53	43	37	:	39	48	:	28	11	:
Small	56	62	58	:	49	37	32	:	36	35	:	24	8	:
Medium	81	84	85	:	70	60	51	:	52	72	:	34	13	:
Large	96	96	96	:	91	80	79	:	63	96	:	62	38	:
No training														
Total	38	:	31	37	63	47	57	:	61	:	52	89	72	:
Small	44	:	38	42	68	51	63	:	64	:	65	92	76	:
Medium	19	:	16	15	49	30	40	:	48	:	28	87	66	:
Large	4	:	4	4	21	9	20	:	37	:	4	62	38	:
CVT courses														
Total	54	:	61	47	24	26	21	:	26	:	33	7	17	:
Small	48	:	54	42	19	22	15	:	21	:	20	5	14	:
Medium	75	:	79	72	37	39	35	:	44	:	54	9	20	:
Large	93	:	95	93	64	70	61	:	59	:	86	31	47	:
Existence of a company training plan														
Total	47	:	32	19	26	10	16	:	15	:	76	38	22	:
Small	41	:	21	14	17	7	11	:	10	:	65	23	18	:
Medium	60	:	49	27	39	15	22	:	23	:	85	38	22	:
Large	77	:	76	65	66	39	47	:	65	:	93	68	52	:
Assessing future skills and training needs														
Total	49	:	52	56	20	43	61	:	45	:	56	88	68	:
Small	44	:	48	55	12	41	58	:	42	:	47	84	64	:
Medium	58	:	58	58	31	46	63	:	48	:	65	88	73	:
Large	68	:	72	80	58	57	81	:	77	:	62	94	83	:

Table 5: Main indicators of training by enterprise size class (NACE Sections C to K and O), 1999 (% of enterprises) (1)

(1) Micro enterprises were not part of the survey.

Innovation

Among manufacturing enterprises in Latvia, Lithuania, Poland, Slovakia and Slovenia, the proportion of enterprises with innovation activity did not exceed 32 % during the period 1998 to 2000. Small enterprises were less likely to have innovation activity than medium-sized or large enterprises, as the propensity to innovate increased with the average size of enterprise (in keeping with the EU results for CIS3).

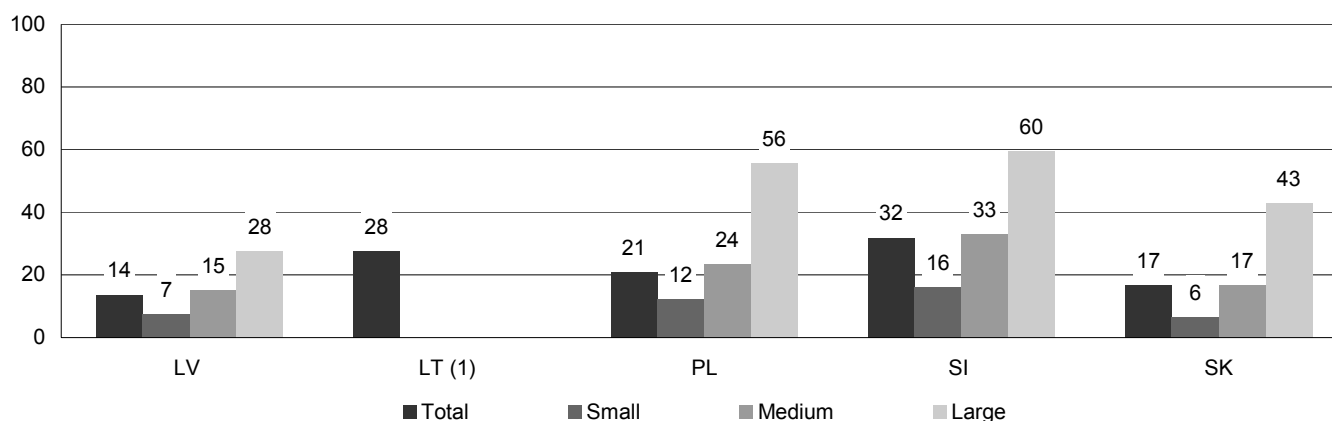


Figure 7: Proportion of enterprises with innovation activity by enterprise size class, manufacturing (NACE Section D), 1998-2000 (%) (2)

(1) Not available for a breakdown by size-class. (2) Micro enterprises were not part of the survey; 1998 for LV, LT and SI; 1999 for SK; 2000 for PL.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Micro, small and medium-sized enterprises are socially and economically important, since they represent 99 % of all enterprises in the EU and provide around 65 million jobs. They are considered by the European Commission as an essential source of entrepreneurship and innovation. However, to compensate for some of the difficulties that they face, Community and national legislation sometimes grant various exceptions or advantages to SMEs.

SIZE CLASS DEFINITION

Commission Recommendation 2003/361/EC of 6 May 2003 provides a working definition of SMEs - more details are given at the top of the first page of this publication. Every attempt has been made to standardise the presentation of data according to these criteria. However, it is sometimes the case that certain size classes are not covered by particular surveys. When this occurs, the excluded size classes are specified for each table or figure.

NACE

NACE is a hierarchical classification of economic activities¹ that is made up of Sections (1-letter codes), Subsections (2-letter codes), Divisions (2-digit codes), Groups (3-digit codes) and Classes (4-digit codes). The data presented in this publication are usually highly aggregated due to space constraints. Where possible, use has been made of a business economy aggregate, defined as NACE Sections C to I and K.

GEOGRAPHICAL COVERAGE

The EU-15 average covers all 15 Member States, except for data coming from the labour costs survey, for which Sections H, I and K were not included for Germany, and Section H which was not included for Ireland.

NON-AVAILABILITY

In tables, the colon (:) is used to represent data that is not available.

MAIN DATA SOURCES

Structural Business Statistics (SBS): collected within the legal framework of Council Regulation (EC, EURATOM) No. 58/97 of December 1996 concerning structural business statistics². The statistical unit is the enterprise. The following economic activities were included in the target population: NACE Sections C to K. The target population was enterprises of all size classes. Size classes are measured in terms of the number of persons employed.

National accounts: are compiled in accordance with the European System of Accounts-ESA 1995. Aggregates are computed and published for the European Union (EU-15) and candidate countries. National Accounts data are published in euro, in national currencies (including euro converted from former national currencies using the irrevocably fixed rate for all years) and in purchasing power standards, at current prices and at constant prices.

Labour Cost Survey (LCS): labour cost surveys have been carried out usually every four years since 1975, with some updates for years between surveys. Costs are broken down by several components; the data are classified by NACE, the

size of the enterprise and the region. Information is also included on the number of employees and hours worked.

Continuing Vocational Training Survey (CVTS): this survey collects information about training that is provided by enterprises for their employees (excluding apprentices and trainees). CVT courses can be designed and managed either by the enterprise itself or by organisations that are not part of the enterprise. The target population is enterprises with 10 or more employees within NACE Sections C to K and O. The reference period is 1999. Size classes are measured in terms of the number of employees.

Community Innovation Survey (CIS3): CIS3 covers the period 1998-2000 and for candidate countries for which data are available the data have been collected on a voluntary basis. The target population is all enterprises with 10 or more employees.

FURTHER INFORMATION

Eurostat databases are updated on a frequent basis and the latest data are available within NewCronos (the reference database). Users wishing to access this data are invited to consult one of the Eurostat Data Shops that are listed overleaf on the back page for more details.

¹ ISBN 92-826-8767-8, available from the usual outlets for Commission publications.

² Available at <http://www.forum.europa.eu.int/irc/dsis/bmethods/info/data/new/legislation/sbs.html>

Further information:

➤ Reference publications

Title SMEs in Europe - Candidate Countries (forthcoming)
 Catalogue No KS-CJ-04-001-EN-C Price EUR 14,50

➤ Databases

NewCronos, Theme 4, Domain: sbs/sizclass

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