22

Media and communications

This chapter focuses on activities whose principal characteristic is to provide services related to the exchange of information. It includes the industrial activities of publishing, printing, and the reproduction of recorded media (NACE Division 22), as well as postal, courier and telecommunication services (NACE Division 64).

This chapter gathers together several activities linked to media and communication activities, however, within this group a distinction has to be made between traditional activities (for example, postal services) for which the level of activity is rather stable and other newer activities (such as mobile telephony and electronic publishing), for which growth developments are more marked.

Structural profile

There were 293.2 thousand enterprises in the EU-27's media and communications (NACE Divisions 22 and 64) sector in 2006, which together employed 4.9 million persons. Paid employees accounted for 95.0 % of the workforce in 2006, a working status that was dominant when compared with the equivalent share for the non-financial business economy average (86.5 %, NACE Sections C to I and K). The share of paid employees was particularly high in the post and telecommunications activities (NACE Division 64) and publishing (NACE Group 22.1), indicating a very low share of working proprietors and unpaid family workers in these activities, unsurprising given the dominance of very large enterprises. The enterprises in the media and communications sector generated EUR 792.3 billion of turnover resulting in EUR 349.7 billion of value added. Apparent labour productivity was high in these activities as they accounted for 6.2 % of total value added in the non-financial business economy but just 3.7 % of employment.

With EUR 200 billion of value added, telecommunications (NACE Group 64.2) was the largest media and communications subsector in 2006, accounting for over half (57.2 %) of the total, followed by post and courier activities (NACE Group 64.1) with a 17.2 % share. The two smaller subsectors, publishing (NACE Group 22.1), as well as printing and reproduction of recorded media (NACE Groups 22.2 and 22.3) each contributed around 14 %. In employment terms the situation was very different. Post and courier activities had the largest workforce, close to two fifths (38.4 %, 2005) of the media and communications total, more than double its value added share. Printing and the reproduction of recorded media also had a higher share of this sector's workforce, as did publishing to a lesser extent. Consequently, the telecommunications workforce accounted for just one quarter of the sectoral total in 2005, approximately half of the share this subsector recorded in terms of value added.

Germany and the United Kingdom were the largest Member States in the media and communications sector in 2006, both accounting for around one fifth of the EU-27's value added. In employment terms, Germany's share was slightly larger, while that of the United Kingdom was significantly smaller. Looking at the contribution of this sector within the non-financial business economy, the most specialised Member State [1] in value added terms was Bulgaria (2005), where media and communications activities contributed just over one tenth of non-financial business economy value added; in fact this sector was the second largest sector (in terms of the sectoral chapter aggregates used in this publication) in Bulgaria. The sector was quite important in all Member States, as even in Austria, the least specialised Member State in 2006, it accounted for 4.6 % of non-financial business economy value added.

(1) Bulgaria, Cyprus, Poland and Romania, 2005; Luxembourg, Malta and the Netherlands, not available.

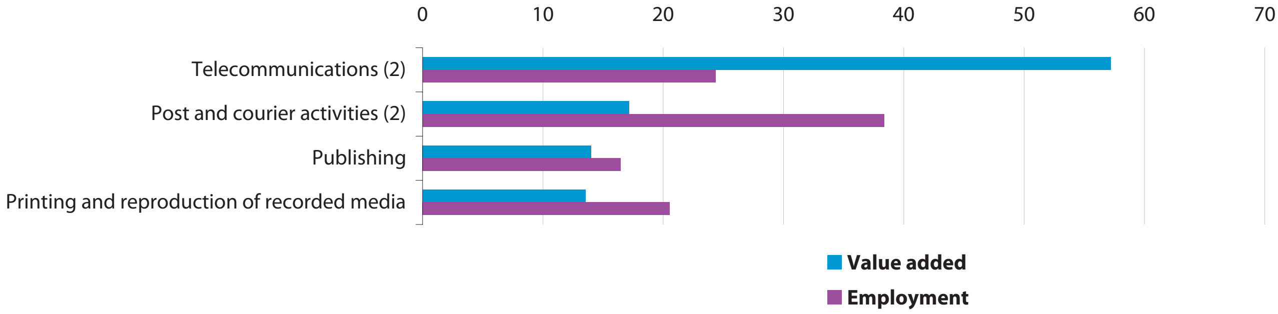
Table 22.1: Media and communications (NACE Divisions 22 and 64)
Structural profile, EU-27, 2006 (1)

	Enterprises		Turnover		Value added		Persons employed	
	(thousand)	(% of total)	(EUR million)	(% of total)	(EUR million)	(% of total)	(thousand)	(% of total)
Media and communications	293.2	100.0	792 335	100.0	349 663	100.0	4 857.3	100.0
Publishing	81.0	27.6	130 000	16.4	49 000	14.0	800.0	16.5
Printing and reproduction of recorded media	138.9	47.4	124 655	15.7	47 331	13.5	997.7	20.5
Post and courier activities (2)	40.0	13.9	100 978	13.1	60 000	17.2	1 881.7	38.4
Telecommunications (3)	30.0	10.2	421 219	54.7	200 000	57.2	1 193.5	24.3

(1) Rounded estimates based on non-confidential data.
(2) Number of enterprises, turnover and number of persons employed, 2005.
(3) Turnover and number of persons employed, 2005.

Source: Eurostat (SBS)

Figure 22.1: Media and communications (NACE Divisions 22 and 64)
Share of media and communications, EU-27, 2006 (%) (1)



(1) Rounded estimates based on non-confidential data.
(2) Number of persons employed, 2005.

Source: Eurostat (SBS)

Table 22.2: Media and communications (NACE Divisions 22 and 64)
Structural profile: ranking of top five Member States, 2006

	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in the non-financial business economy (%) (2)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Value added	Persons employed
1	United Kingdom	71 116	20.3	Germany	1 012.1	20.8	Bulgaria (10.3)	Finland (5.5)
2	Germany	67 729	19.4	United Kingdom	804.8	16.6	Romania (8.3)	Denmark (5.2)
3	France	48 191	13.8	France	612.0	12.6	Ireland (8.3)	Sweden (4.9)
4	Italy	40 529	11.6	Italy	434.2	8.9	Greece (7.8)	Germany (4.7)
5	Spain	27 903	8.0	Spain	321.2	6.6	Hungary (7.0)	United Kingdom (4.5)

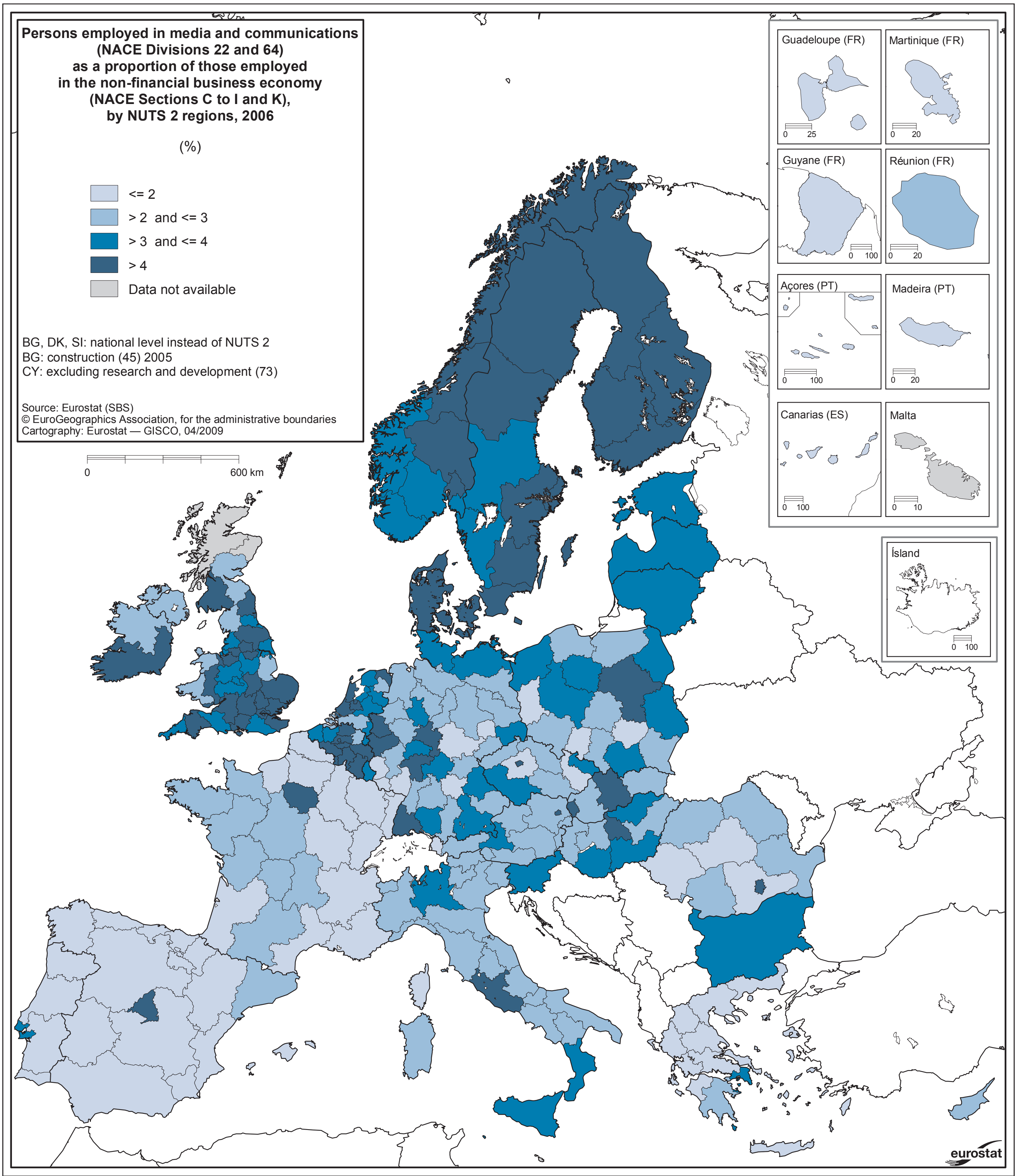
(1) Luxembourg and Malta, not available; Cyprus, the Netherlands and Poland, 2005.
(2) Luxembourg, Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland and Romania, 2005.

Source: Eurostat (SBS)

The regional specialisation of these activities is shown in the map which is based on the non-financial business economy employment share of this sector. Countries with many regions specialised in these activities include the United Kingdom, Germany, the Netherlands, Belgium, the Nordic countries and Slovakia. These activities were often particularly centred in or around the capital, with the capital region in 15 of the 18 multi-regional Member States (with data available) being among the most specialised regions (more than 4 % of the workforce in this activity). The main exception to this was Germany, as the capital region of Berlin was not particularly specialised in media and communications; in another German region however, Köln, this sector accounted for 25.3 % of non-financial business economy employment, making this the single most specialised region in media and communications among all of the regions in the EU.

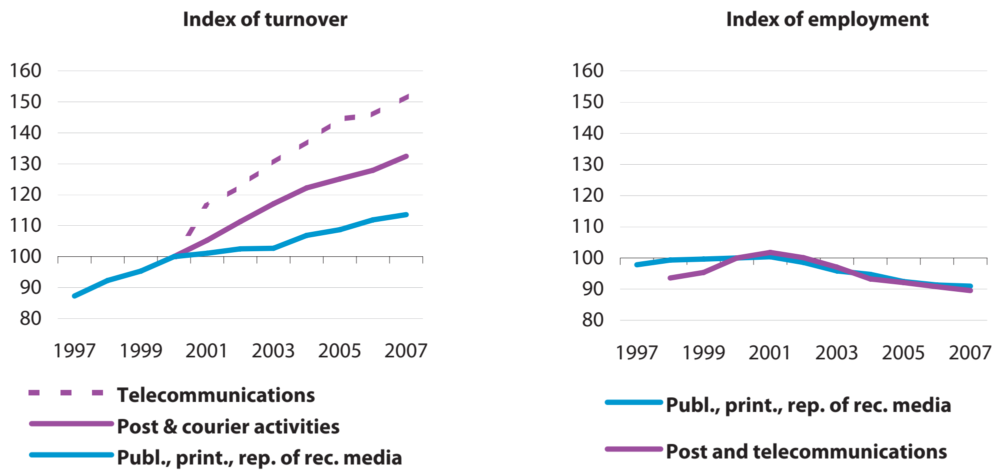
Annualised short-term statistics are available for the EU-27 starting in 1998 (employment) and 2000 (turnover) for the services activities of post and telecommunications, while a longer series is available for the industrial activity of publishing, printing, and the reproduction of recorded media (NACE Division 22). Looking first at turnover, post and courier activities (NACE Group 64.1) and telecommunications (NACE Group 64.2) both developed strongly since 2000, averaging growth of 4.1 % per annum for post and courier activities up to 2007 and 6.1 % per annum for telecommunications in the EU-27. In contrast, the turnover index for publishing, printing, and the reproduction of recorded media grew on average by 1.8 % per year over the same period, only exceeding this average on two occasions, 2004 (4.1 %) and 2006 (2.9 %).

Map 22.1: Media and communications (NACE Divisions 22 and 64)
Persons employed in media and communications (NACE Divisions 22 and 64) as a proportion of those employed in the non-financial business economy (NACE Sections C to I and K) (%)



Source: Eurostat (SBS)

Figure 22.2: Media and communications (NACE Divisions 22 and 64)
Evolution of main indicators, EU-27 (2000=100)



Source: Eurostat (STS)

Table 22.3: Media and communications (NACE Divisions 22 and 64)
Share of value added and persons employed by enterprise size class, EU-27, 2006 (%)

	Value added		Persons employed	
	Non-financial business economy (1)	Publishing, printing, reproduction of recorded media; post and telecommunications	Non-financial business economy	Publishing, printing, reproduction of recorded media; post and telecommunications
1 to 9 persons employed	21.0	5.2	29.7	11.6
10 to 49 persons employed	18.9	7.6	20.7	11.6
50 to 249 persons employed	17.8	9.1	17.0	12.1
250 or more persons employed	42.1	78.2	32.6	64.7

(1) 1 to 9 persons employed and 50 to 249 persons employed, 2005.

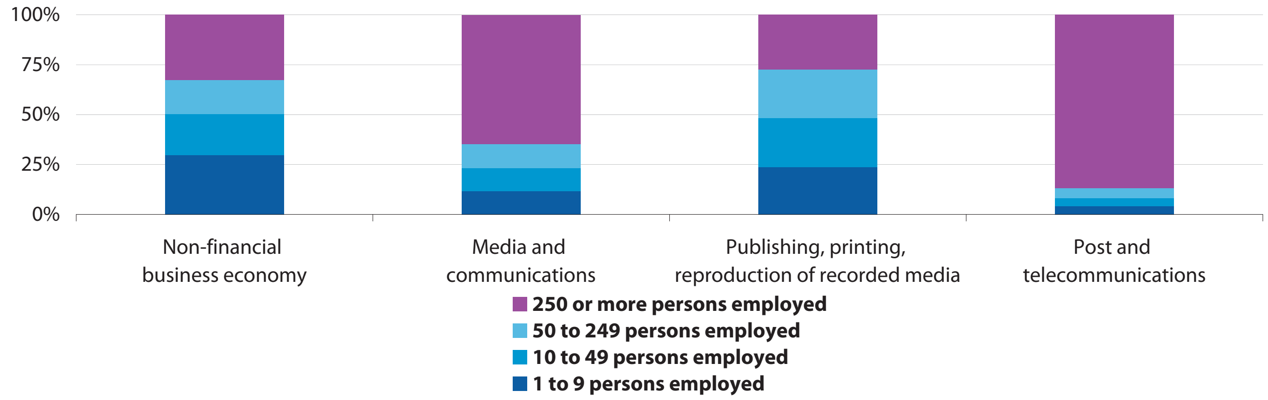
Source: Eurostat (SBS)

In employment terms, two phases of development could be observed for post and telecommunications as well as for publishing, printing, and the reproduction of recorded media: both activities showed a period of growth until 2001, followed by a reduction in employment levels. Between 2001 and 2007, the average annual fall for the employment index for publishing, printing, and the reproduction of recorded media was -1.6 %, while for post and telecommunications it was -2.1 %. As such, post and telecommunications was one of only two services sectors (along with air transport) that recorded a reduction in employment during this period.

Large enterprises (with 250 and more persons employed) were predominant in the EU-27's media and communications sector as they contributed more than three quarters of total value added generated in this sector in 2006 and occupied close to two thirds of the workforce. Post and telecommunications was dominated by large enterprises, as these accounted for 92.4 % of sectoral value added in the EU-27. This was the highest proportion of value added accounted for by large enterprises across all non-financial services (NACE Sections G to I and K) NACE divisions [2] in 2006. In contrast, the value added share of large enterprises in publishing, printing and the reproduction of recorded media was 41.2 %, marginally below the non-

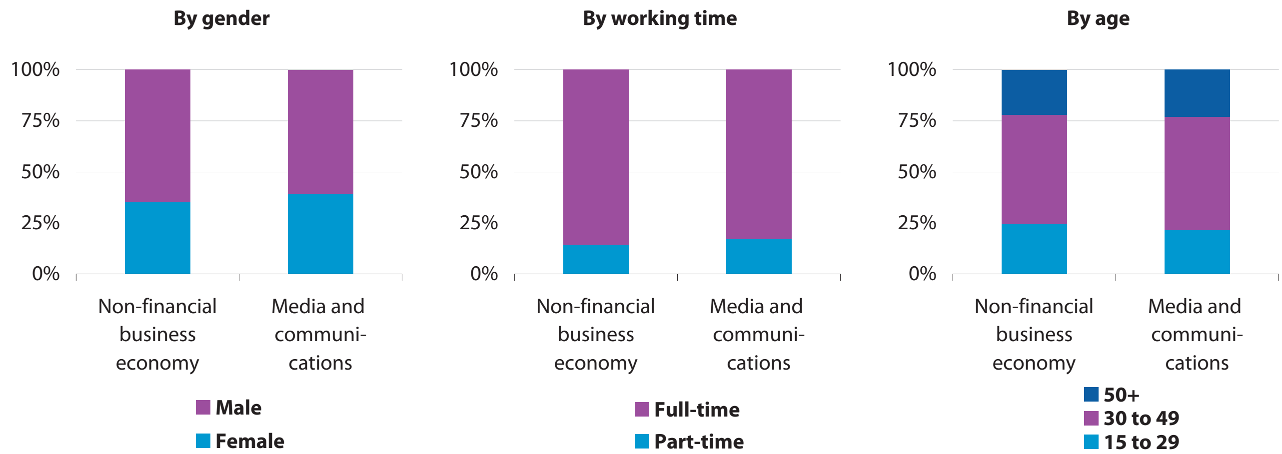
(2) NACE Divisions 55 and 60, 2005.

Figure 22.3: Media and communications (NACE Divisions 22 and 64)
Share of employment by enterprise size class, EU-27, 2006



Source: Eurostat (SBS)

Figure 22.4: Media and communications (NACE Divisions 22 and 64)
Employment characteristics, 2007



Source: Eurostat (LFS)

financial business economy average. The share of value added generated by micro enterprises (with less than 10 persons employed) in publishing, printing and the reproduction of recorded media (14.6 %) was also below the non-financial business economy average (21.0 %, 2005). As a result, small enterprises (with between 10 and 49 persons employed), and particularly medium-sized enterprises (with between 50 and 249 persons employed) made a relatively high contribution within the publishing, printing and the reproduction of recorded media activities.

Employment characteristics

Labour force statistics show that the characteristics of the workforce in the EU-27's media and communications sector (NACE Divisions 22 and 64) did not diverge greatly from those for the non-financial business economy as a whole. Indeed, about three fifths (60.6 %) of the sectoral workforce were men in 2007, a proportion slightly lower than that for the non-financial business economy as a whole (64.9 %). The proportion of part-time employment in the sector was 17.0 % in 2007, compared with 14.4 % for the non-financial business economy. A breakdown by age of the workforce for the EU-27's media and communications sector shows that younger workers (aged 15 to 29) accounted for a lower proportion of the workforce than in the non-financial business economy as a whole, with slightly higher proportions for the two other age groups.

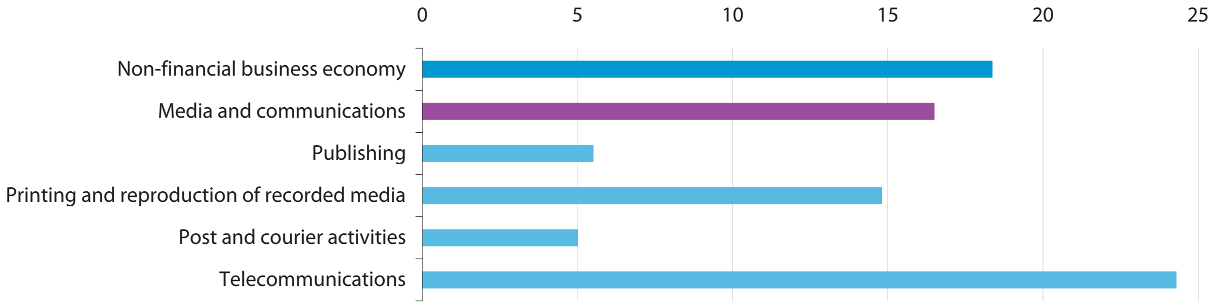
Table 22.4: Media and communications (NACE Divisions 22 and 64)
Expenditure, productivity and profitability, EU-27, 2006 (1)

	(EUR million)			(EUR thousand per person)		(%)	
	Personnel costs	Purchases of goods & services	Invest-ment in tangible goods	Apparent labour produc-tivity	Average personnel costs	Wage adjusted labour produc-tivity	Gross operating rate
Media and communications	170 408	457 355	57 698	72.0	36.9	195.0	22.6
Publishing (2)	31 000	82 134	2 700	61.3	38.8	158.1	13.8
Printing and reproduction of	28 631	77 221	7 004	47.4	32.3	146.9	15.0
Post and courier activities (3)	50 000	42 953	3 000	32.2	27.6	116.6	10.2
Telecommunications (4)	60 340	242 339	46 223	159.4	51.5	309.4	30.8

(1) Rounded estimate based on non-confidential data.
(2) Purchases of goods and services, 2005.
(3) Purchases of goods and services, apparent labour productivity, average personnel costs, wage adjusted labour productivity and gross operating rate, 2005.
(4) 2005.

Source: Eurostat (SBS)

Figure 22.5: Media and communications (NACE Divisions 22 and 64)
Investment rate, EU-27, 2006



Source: Eurostat (SBS)

Expenditure, productivity and profitability

In 2006, the EU-27 media and communications sector undertook tangible investments to the value of EUR 57.7 billion, equivalent to 5.6 % of the total for the non-financial business economy. As this was slightly lower than the sector's share of value added, the investment rate for media and communications (16.5 %) was below the non-financial business economy average (18.4 %). The vast majority of this investment was recorded for telecommunications, which consequently had the highest investment rate (24.3 %, 2005). Post and courier activities as well as publishing both recorded particularly low investment rates – these being the fifth and seventh lowest rates among all NACE divisions in the non-financial business economy (with data available for 2005 or 2006). Romania, Cyprus (both 2005) and the United Kingdom were the only Member States [3] where the investment rate for media and communications was higher than the non-financial business economy average.

The share of personnel costs in operating expenditure was also considerably higher for the EU-27's media and communications sector (27.1 %) than for the non-financial business economy as a whole (16.1 %). This was the case in all of the subsectors that make up the media and communications sector, where the share of total expenditure dedicated to personnel costs was lowest at 19.9 % (2005) for telecommunications and reached as high as 53.9 % (2005) for post and courier activities, the fourth highest share among all NACE groups within the non-financial business economy (in 2005 or 2006). This high share of personnel costs for media and communications was observed in all the Member States with data available.

(3) Bulgaria, Cyprus, Poland and Romania, 2005; Ireland, Luxembourg, Malta and the Netherlands, not available.

Average personnel costs in the EU-27's media and communications sector were EUR 36.9 thousand per employee, which was EUR 8.1 thousand per employee higher than the non-financial business economy average. The only subsector with average personnel costs below the non-financial business economy average was post and courier activities, while the EUR 51.5 thousand per employee average for telecommunications was the highest among the non-financial services (NACE Sections G to I and K) NACE groups.

Apparent labour productivity in the EU-27's media and communications sector was EUR 72.0 thousand per person employed in 2006, which was nearly two thirds higher than the non-financial business economy average. Underlying this was a particularly high apparent labour productivity in the telecommunications subsector – the fourth highest among all non-financial business economy NACE groups in 2005 or 2006 – as well as a high productivity in publishing. In contrast, the post and courier activities subsector recorded apparent labour productivity below the non-financial business economy average in 2005.

The wage adjusted labour productivity ratio within the EU-27's media and communications sector (195.0 %) in 2006 indicated that apparent labour productivity was close to twice as high as average personnel costs. Again it was the telecommunications sector that recorded the highest ratio, 309.4 % in 2005. Among the Member States [4] only Denmark recorded a lower wage adjusted labour productivity ratio for media and communications than for the non-financial business economy as a whole. In a similar manner, the gross operating rate for the EU-27's media and communications sector stood at 22.6 % in 2006, which was more than twice the non-financial business economy average (10.8 %); once more the highest rate among the subsectors was recorded for telecommunications (30.8 %, 2005).

(4) Bulgaria, Cyprus, Poland and Romania, 2005; Ireland, Luxembourg, Malta and the Netherlands, not available.

22.1: Publishing

Publishing can be defined as the act of producing and issuing informative material. This activity is covered by NACE Group 22.1. Note that publishing activities include not only the publishing of printed matter, but also the publishing of music.

While the Internet was initially seen by many as a direct competitor to printed matter, enterprises that traditionally published printed media have often diversified into online media too, for example, newspapers, magazines, books or reference material are increasingly consulted online or through some other type of electronic medium. Note that on-line publishing, not in connection with other publishing, is considered as a computer and related activity rather than publishing.

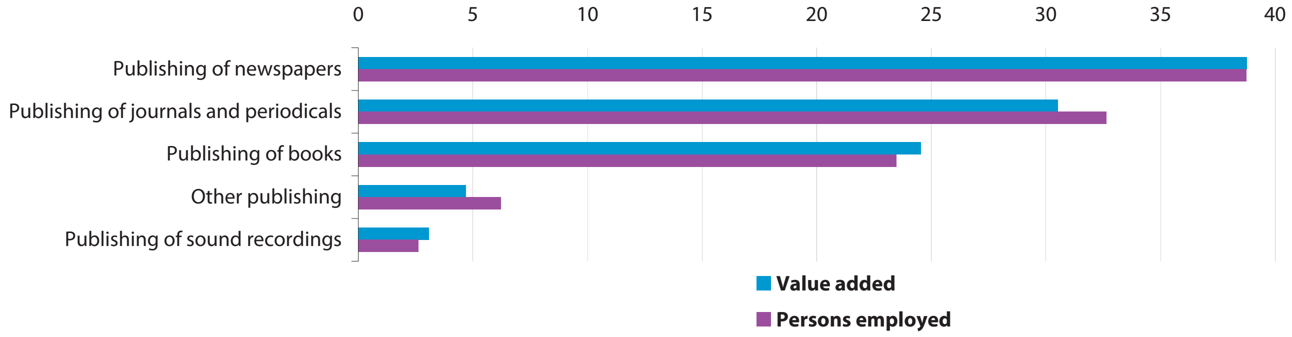
Structural profile

Value added generated by the 81.0 thousand enterprises that make up the EU-27's publishing sector (NACE Group 22.1) reached EUR 49 billion in 2006, derived from turnover of EUR 130 billion. This was equivalent to 14.0 % of the media and communications (NACE Divisions 22 and 64) value added, and 16.4 % of its turnover. There were approximately 800.0 thousand persons employed in these activities in the EU-27, which represented 16.5 % of the media and communications workforce. Within the publishing subsector the largest contribution to value added in the EU-27 in 2006 was from the publishing of newspapers (NACE Class 22.12), followed by the publishing of journals and periodicals (NACE Class 22.13) and the publishing of books (NACE Class 22.11). Slightly more than one quarter of the EU-27's value added in the publishing sector in 2006 was concentrated in the United Kingdom while one fifth came from Germany. Unsurprisingly, the United Kingdom ranked as one of the most specialised Member States within the publishing sector in value added terms, as this activity generated 1.2 % of its non-financial business economy value added, lower only than in Finland.

Expenditure and productivity

The investment rate in publishing was particularly low, just 5.5 % in the EU-27, one of the lowest of all non-financial business economy NACE groups in 2006. Apparent labour productivity for the EU-27's publishing sector was below the media and communications average in 2006, while average personnel costs were above average. This situation led to a wage adjusted labour productivity ratio (158.1 %) for the publishing sector that was well below the media and communications average (195.0 %), but nevertheless still above the average ratio for the non-financial business economy.

Figure 22.6: Publishing (NACE Group 22.1)
Relative weight within publishing, EU-27, 2006 (%) (1)



(1) Rounded estimates based on non-confidential data.

Source: Eurostat (SBS)

Table 22.5: Publishing (NACE Group 22.1)
Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in non-financial business economy (%) (2)	
	Country	(EUR million)	(% of EU-27)	Country	(thou-sand)	(% of EU-27)	Country	Value added
1	United Kingdom	13 261	27.1	Germany	190.3	23.8	Finland	1.3
2	Germany	9 773	19.9	United Kingdom	165.6	20.7	United Kingdom	1.2
3	France	6 407	13.1	France	86.0	10.8	Greece	1.0
4	Italy	4 288	8.8	Spain	58.9	7.4	Denmark	1.0
5	Spain	3 788	7.7	Italy	45.9	5.7	Sweden	0.9

(1) Malta, not available; the Netherlands, Poland and Portugal, 2005.
(2) Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland, Portugal and Romania, 2005.

Source: Eurostat (SBS)

22.2: Printing and reproduction of recorded media

Printing, whether on paper or other supports, is covered by NACE Group 22.2 (for printing and service activities related to printing). As well as printing, this subchapter also includes the reproduction of recorded media (NACE Group 22.3), including reproduction services for sound and video recording (NACE Classes 22.31 and 22.32) and reproduction services for software (NACE Class 22.33).

More so than many other industrial processes, printing has been revolutionised by information technologies. Information technology has created a number of electronic alternatives to traditional printing and at the same time enabled smaller and more flexible print-runs.

Structural profile

The 138.9 thousand enterprises that make up the EU-27's printing and reproduction of recorded media sector (NACE Groups 22.2 and 22.3) employed 997.7 thousand persons in 2006, around one fifth (20.5 %) of the media and communications (NACE Divisions 22 and 64) workforce. These enterprises generated EUR 124.7 billion of turnover and EUR 47.3 billion of value added; in output terms the contribution of this sector to the media and communications total was considerably less than in employment terms, this sector's value added for example amounting to 13.5 % of the total.

Among the two NACE groups that make up the printing and reproduction of recorded media sector, printing and service activities related to printing (NACE Group 22.2, hereafter referred to as printing) was dominant by all measures studied, with 88.0 % of the sector's value added and 96.4 % of the workforce. The output of these two activities developed differently in recent years, with the growth in the production index being remarkably strong for the reproduction of recorded media, while that for printing was below the industrial average.

Slightly less than one fifth of the EU-27's value added in the printing and reproduction of recorded media sector in 2006 was concentrated in each of the United Kingdom and Germany. Printing

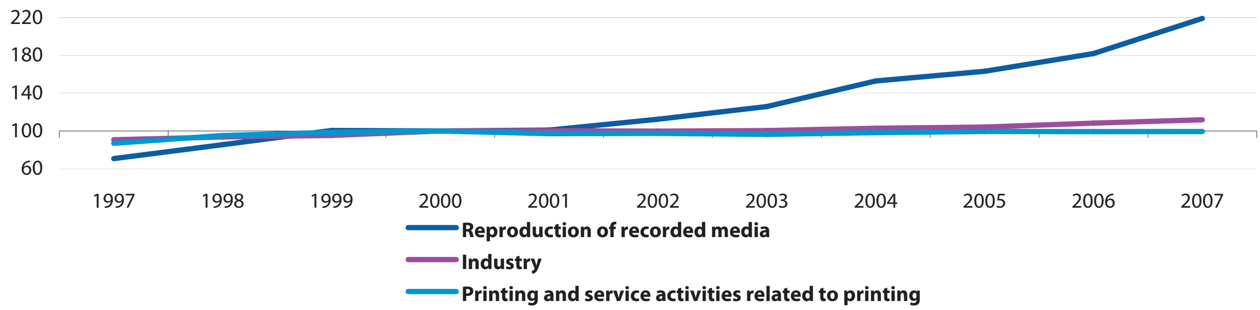
Table 22.6: Printing and service activities related to printing; reproduction of recorded media (NACE Groups 22.2 and 22.3)
Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

	Highest value added (1)			Largest number of persons employed			Most specialised: share in non-financial business economy (%) (3)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand) (1)	(% of EU-27) (2)	Country	Value added
1	United Kingdom	9 386	19.8	Germany	173.2	17.4	Ireland	4.8
2	Germany	9 158	19.3	United Kingdom	163.8	16.4	Greece	1.1
3	Italy	5 365	11.3	Italy	119.5	12.0	Slovenia	0.9
4	France	4 578	9.7	France	102.8	10.3	United Kingdom	0.9
5	Ireland	4 325	9.1	Spain	97.1	9.7	Belgium	0.9

(1) Luxembourg and Malta, not available; the Netherlands, Poland and Portugal, 2005.
(2) Luxembourg, Malta, the Netherlands, Poland and Portugal, not available.
(3) Luxembourg, Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland, Portugal and Romania, 2005.

Source: Eurostat (SBS)

Figure 22.7: Printing and service activities related to printing; reproduction of recorded media (NACE Groups 22.2 and 22.3)
Index of production, EU-27 (2000=100)



Source: Eurostat (STS)

accounted for at least four fifths of value added in the printing and reproduction of recorded media sector in every Member State, except for Ireland, where the reproduction of recorded media generated 94.4 % of sectoral value added. In fact, Ireland alone generated 71.8 % of the EU-27's value added in the reproduction of recorded media subsector.

Expenditure and productivity

The EU-27's printing subsector recorded an investment rate of 15.7 %, while for the reproduction of recorded media subsector the rate was just 8.5 %. Equally, an analysis of operating expenditure shows differences between the subsectors: personnel costs accounted for 30.0 % of operating expenditure for the printing subsector, and just 8.3 % for the reproduction of recorded media subsector, the former being close to double the non-financial business economy average and the latter around half. Apparent labour productivity for the EU-27's printing subsector was EUR 43.3 thousand per person employed while the ratio reached EUR 156.6 thousand for the reproduction of recorded media in 2006. The difference in average personnel costs was less notable, ranging from EUR 32.1 thousand per employee for printing to EUR 38.4 thousand per employee for the reproduction of recorded media. These figures led to a wage adjusted labour productivity ratio below the non-financial business economy average for the printing subsector (135.0 %), while the reproduction of recorded media had a wage adjusted labour productivity ratio of 408.2 %, meaning that the value added per person employed in this subsector covered average personnel costs four times over. This was the second highest wage adjusted labour productivity ratio recorded among any of the NACE groups within the non-financial business economy (with data available in 2005 or 2006).

22.3: Post and courier activities

This subchapter covers NACE Group 64.1, which includes both national post activities (NACE Class 64.11) and other courier activities (NACE Class 64.12). National post activities include the pick-up, transport and delivery (domestic or international) of mail and parcels, and other services such as P.O. boxes. Courier activities other than national post activities include mainly express courier services, where enterprises have widened their initial focus on business documents towards the transfer of packages and freight, blurring the distinction between courier and transport enterprises.

In most Member States, universal service providers (USPs) [5] still operate as a monopoly and have exclusive rights, balanced by the fact that they have a universal service obligation. Private operators dominate the express services market, providing letter and parcel services, specifically to the business-to-business, direct mail and business-to-private segments of the market. Since the middle of the 1990's there have been gradual developments towards market liberalisation for post and courier services, with parcels and express services markets now fully open to competing operators. The latest amendment [6] to the 1997 Directive on Community postal services was adopted in February 2008 and set out a timetable to abolish remaining restrictions on mail deliveries under 50 grams (known as the 'reserved area' for national operators) and open up Europe's postal sector to full competition. The deadline for full market opening is 31 December 2010 for just over half of the Member States and 31 December 2012 for the remainder.

Focus on postal infrastructure and transport of postal items

According to data collected by the UPU [7] from its postal administration members, there were about 100.4 thousand permanent post offices in the EU-27 in 2006. This was slightly more than in 2004 or 2005, and equivalent to one permanent post office for every 4.9 thousand inhabitants on average.

The number of letter-items for both domestic and international dispatch was 117.8 billion in the EU-27 in 2006, about 2 billion less than in 2004 or 2005 and equivalent to an average of 238 letters per inhabitant. Ordinary parcels for both domestic and international dispatch amounted to 1.0 billion items in 2006, again slightly lower than the previous two years. For both letters and parcels, domestic deliveries accounted for the vast majority of the total, 98.5 % for letters and 97.7 % for parcels.

According to Eurostat's Inquiry on Postal Services, among the Member States for which data is available, mail deliveries in the 'reserved area' (where universal service providers have exclusive rights) ranged from 39 % of letter-post services in Estonia up to 94 % in Malta, with Finland, Sweden and the United Kingdom reporting no reserved area. The price for a standard letter was 20 cents or less in Romania, Malta and Slovenia, while it reached 60 cents or more in Finland, Denmark and Italy.

(5) The term USP takes account of the possibility that operators are no longer public organisations.
(6) Directive (EC) no 2008/6 of the European Parliament and of the Council.
(7) UPU (Universal Post Union), more information at: http://www.upu.int.

Table 22.7: Postal services
Evolution of main indicators, EU-27

	2002	2003	2004	2005	2006
Total number of permanent post offices (units)	103 176	101 602	99 801	100 182	100 366
of which, staffed by people from outside the administration (%)	36.5	35.9	35.6	36.8	40.7
Number of letter-post items, domestic service (million)	112 769	112 764	116 866	117 227	115 135
Number of letter-post items, international service-dispatch (million)	2 902	2 905	2 785	2 712	2 686
Ordinary parcels, domestic services (million)	1 073	1 041	1 066	1 013	990
Ordinary parcels, international service-dispatch (million)	14	14	14	14	15

Source: UPU, http://www.upu.int, Postal statistics database

Table 22.8: Postal services
Selected indicators for Universal Service Providers (USPs), 2006

	Letter-post services (thousand) (1)	of which (%): Reserved area (2)	Price for standard letter (EUR)	On-time delivery (D+1) (%) (3)
BE	:	:	0.52	92.0
BG (4)	71 782	77.6	0.23	88.0
CZ	930 396	56.5	0.26	94.0
DK	1 367 236	60.6	0.64	94.1
DE	17 000 000	67.6	0.55	95.9
EE	117 439	38.9	0.28	90.5
IE	709 500	75.0	0.48	72.0
EL	652 413	76.3	0.52	77.7
ES (5)	5 078 353	59.3	0.30	87.0
FR	:	:	0.54	81.2
IT	5 474 137	61.4	0.60	88.1
CY	54 406	:	0.35	63.6
LV	69 768	89.0	0.32	92.5
LT	120 015	45.2	0.29	67.8
LU	180 800	65.6	0.50	97.3
HU	839 767	87.1	0.34	91.8
MT	53 617	93.5	0.19	93.4
NL	4 918 000	:	0.39	96.6
AT	:	:	0.55	95.0
PL	1 634 200	81.3	0.51	68.2
PT	1 239 000	76.7	0.45	92.6
RO (6)	329 695	46.7	0.14	66.2
SI (6)	398 008	70.0	0.20	88.0
SK	360 611	56.2	0.43	96.5
FI	2 150 100	0.0	0.70	96.0
SE	2 664 257	0.0	0.59	94.2
UK	:	0.0	0.47	94.0
HR (5)	298 891	87.1	0.31	98.0
IS	57 614	88.4	0.57	89.0
NO	1 247 409	:	0.81	82.4

(1) Letter-post services: the indicator covers items of correspondence (ordinary letters and postcards, direct mail, registered mail, insured mail) and other letter-post items (books, catalogues, newspapers and periodicals).
(2) Reserved area: refers to the standard letter-post service, where USPs enjoy exclusive rights to provide services. The reserved area is delineated at country level within weight/price limits given by the EC postal directives (97/67/EC and 2002/39/EC). Country definitions for the reserved area vary, so direct comparisons between countries should be made with prudence. In this publication it is expressed in terms of the percentage of the total letter post services.
(3) On-time delivery: the indicator refers to the share of priority letters delivered on-time according to national performance indicators, the standard measured is D+1.
(4) Price and on-time delivery, 2004.
(5) On-time delivery is calculated at D+3.
(6) On-time delivery is calculated at D+2.

Source: Eurostat, Inquiry on Postal Services 2007

Structural profile

There were approximately 40.0 thousand enterprises in the EU-27's post and courier activities (NACE Group 64.1) sector in 2005. With close to 1.9 million persons employed, this sector represented 38.4 % of the media and communications (NACE Divisions 22 and 64) workforce in 2005. This sector's contribution in terms of output was much lower, 13.1 % in terms of turnover and 17.2 % in terms of value added. National post activities (NACE Class 64.11) was the largest of the two subsectors within the post and courier activities sector, accounting for slightly less than two thirds both of sectoral value added and employment in 2005, the remainder being accounted for by courier activities (NACE Class 64.12).

The five largest EU economies were also the five largest contributors to the post and courier activities sector in 2006, whether measured in value added or employment terms. Looking at the relative contribution of post and courier activities to national non-financial business economy value added, relatively few Member States were particularly specialised or unspecialised in these activities. The most specialised was France where post and courier activities generated 1.4 % of non-financial business economy value added, only slightly above the EU-27 average of 1.1 %; the least specialised countries included the Baltic Member States, Spain and Cyprus where post and courier activities contributed around 0.5 % of non-financial business economy value added. It should be noted that no recent data is available for Luxembourg which, traditionally, is specialised in these activities.

Annual short-term statistics for post and courier activities in the EU-27 provide a picture of the development of the turnover index over the period 2000 to 2007 – see the chapter overview. During this period there was uninterrupted year on year turnover growth in this sector, on average 4.1 % per annum, compared with an average growth rate of 5.3 % per annum for non-financial services (NACE Sections G to I and Divisions 72 and 74).

Table 22.9: Post and courier activities (NACE Group 64.1)
Structural profile, EU-27, 2006

	Enterprises (thousand)	Turnover (EUR million)	Value added (EUR million)	Persons employed (thousand)	Share in total (%) Value added	Share in total (%) Persons employed
Post and courier activities (1)	40.0	100 978	60 000	1 881.7	100.0	100.0
National post activities (2)	:	56 883	39 964	1 239.7	65.9	65.9
Courier activities (2)	39.6	44 095	20 673	642.0	34.1	34.1

(1) Rounded estimates based on non-confidential data; number of enterprises, turnover and number of persons employed, 2005.
(2) 2005.

Source: Eurostat (SBS)

Table 22.10: Post and courier activities (NACE Group 64.1)
Expenditure, productivity and profitability, EU-27, 2006

	(EUR million)			(EUR thousand per person)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs
Post and courier activities (1)	50 000	42 953	3 000	32.2	27.6
National post activities (2)	35 609	16 272	2 046	32.2	29.1
Courier activities (2)	14 700	26 681	1 428	32.2	24.6

(1) Rounded estimates based on non-confidential data; purchases of goods and services, apparent labour productivity and average personnel costs, 2005.
(2) 2005.

Source: Eurostat (SBS)

Expenditure and productivity

In the EU-27's post and courier activities tangible investment was valued at EUR 3.0 billion in 2006, equivalent to 5.0 % of value added: this investment rate was the fifth lowest of all non-financial business economy NACE groups in 2005 or 2006. More than half of operating expenditure in 2005 was accounted for by personnel costs; this was the fourth largest share of personnel costs recorded among all NACE groups in the non-financial business economy, mainly influenced by the high share recorded in national post activities where personnel costs took up more than two thirds (68.6 %) of operating expenditure. In other courier activities, personnel costs still represented more than one third (35.5 %) of operating expenditure in 2005, just over double the non-financial business economy average in the same year.

With EUR 32.2 thousand of value added generated per person employed in 2005, the EU-27's post and courier services sector recorded a relatively low level of apparent labour productivity compared with most other activities, as the non-financial business economy average was EUR 10.1 thousand above this value. Average personnel costs were EUR 27.6 thousand per employee in the EU-27, only slightly below the non-financial business economy (EUR 1.3 thousand below) in 2005. As a consequence, the wage adjusted labour productivity ratio for post and courier services was extremely low, 116.6 % in the EU-27 in 2005, significantly below the non-financial business economy average of 146.5 % and the media and communications average of 188.7 % in the same year. The wage adjusted labour productivity ratio was higher for other courier activities (131.0 %), while it was as low as 110.0 % for national post activities in the EU-27 as a whole. Most Member States [8] recorded a low wage adjusted labour productivity ratio for post and courier activities, although Sweden was the only one that recorded a ratio below parity (100 %) indicating that average personnel costs exceeded apparent labour productivity.

(8) Cyprus and the Netherlands, 2005; the Czech Republic, Ireland, Luxembourg, Malta, Poland and Slovenia, not available.

22.4: Telecommunication services

Telecommunications services (NACE Group 64.2) embrace the distribution of sound, images, data and other information via cables, broadcasting, relay or satellite. These services include both the management and maintenance of networks and the provision of services using these networks, including the provision of radio and television services, but not the production of radio and television programmes.

This subchapter covers, for a large part, the activities of the so-called information society, a society whose wealth is based on its ability to process, store, retrieve and communicate information in whatever form – oral, written or visual. Enterprises acting in computer and related activities, such as hardware, software or data processing, are covered in Subchapter 25.1.

As part of the initiatives to support the development of the information society, the European Commission launched the i2010 strategy in June 2005, a digitally-led strategy for growth and jobs and the EU's policy strategy to boost the digital economy. Its aims are to: establish a European information space, in other words, a true single market for the digital economy so as to exploit fully the economies of scale offered by Europe's consumer market; reinforce innovation and investment in information and communication technology (ICT) research given that ICTs are a principle driver of the economy; and promote inclusion, public services and quality of life, in other words, extending the European values of inclusion and quality of life to the information society. In April 2008, the results of a mid-term review of i2010 [9] was published. A few examples of the activities cited in the review include a new regulatory framework for audiovisual media services, legislation to create a single market for mobile phone use across borders (see below), and proposals to reform the regulation of telecommunications. Concerning the last of these examples, in November 2007 the Commission adopted proposals for a reform of the regulatory framework for telecommunications with the aim to provide consumers with better and cheaper communication services, whether for mobile phones, Internet or cable TV. The proposals covered strengthening consumer rights; reinforcing competition; promoting investment in infrastructure (freeing radio spectrum for wireless broadband services); and making networks more reliable and more secure. Following discussions in the European Parliament and the Council a revised set of proposals were adopted by the Commission in November 2008.

Focus on mobile and fixed line telephony

Information on the market shares of operators in fixed and mobile telecommunications in the Member States shows that incumbents (those enterprises that were active before the liberalisation of the market, generally formerly state-owned telecom operators) still dominate. Across the EU they accounted for more than half of the market in 2005, whether for local, long-distance or international calls (in terms of minutes of connection or turnover). An average for the EU-25 shows that incumbent operators accounted for 72 % of local calls, some 66 % of long-distance calls, and 56 % of international calls. However, in some countries the dominance of the incumbent operator is less marked. For example, in Finland the incumbent accounted for less than half of the market for both long-distance calls and international calls. In some Member States, the same operators for the fixed network offer local and long-distance national and international telecommunications, while in other markets some operators specialise in particular services.

For the leading operators in mobile telecommunications data are available for 2006. Based on the number of subscriptions, leading operators in mobile telecommunications generally accounted for significantly lower market shares compared with the incumbent fixed telecommunication operators, and in a large majority of the Member States they provided less than half of all subscriptions in 2006. Slovenia and Cyprus stood out from the rest of the countries as their leading operators in mobile telecommunications accounted for 71 % and 90 % respectively of total mobile phone subscriptions.

Information on the cost of three types of fixed line calls for September 2006 shows that the difference in the cost between Member States is considerable. Cyprus recorded the lowest costs for local and national calls (EUR 0.22 for a 10 minute call on a weekday, including VAT) while Slovakia was the most expensive, 2.7 times as high for local calls and 5.9 times as high for national calls. Germany had the lowest cost calls to the United States (EUR 0.46), whereas the cost of such calls was 12.9 times as high in Latvia.

(9) COM(2008) 199.

Table 22.11: Telecommunications
Market shares of operators in telecommunications (NACE Group 64.2) (%) (1)

	Incumbent operator in fixed telecommunications, 2005 (2)			Leading operator in mobile telecommunications, 2006 (4)
	Local calls (incl. to the Internet) (3)	Long-distance calls	International calls	
EU-25	72	66	56	39
BE	68	68	58	45
BG	:	:	:	:
CZ	76	63	65	41
DK	:	:	:	32
DE	56	57	39	37
EE	:	:	:	46
IE	83	63	62	47
EL	78	73	74	41
ES	78	75	62	46
FR	80	68	67	46
IT	71	73	47	41
CY	:	:	86	90
LV	97	98	72	35
LT	97	88	76	36
LU	:	:	:	51
HU	92	90	87	45
MT	99	99	98	52
NL	75	75	45	48
AT	53	59	50	39
PL	85	70	71	34
PT	:	78	80	46
RO	:	:	:	:
SI	100	100	83	71
SK	99	100	88	56
FI	95	45	41	45
SE	:	:	:	43
UK	60	52	53	26
NO	:	73	61	57

(1) The incumbent is defined as the enterprise active on the market just before liberalisation; local call: calls within local networks; long distance: calls from one local network to another; estimate of leading operators' market share, minutes of connection or retail revenues, for the fixed market; shares of the Mobile market, based on the number of mobile subscriptions.
(2) Finland, 2004; the Czech Republic, Estionia, Luxembourg and Sweden, confidential.
(3) Austria, 2004.
(4) Norway, 2005.

Source: Eurostat (Information society statistics)

In June 2007 legislation was adopted on charges for using public mobile telephone networks abroad (roaming charges). In September 2008 the European Commission adopted a proposal [10] to extend this from July 2009 to cover roaming charges for sending text messages and using mobile data services, and to extend the duration of the existing legislation on call charges to 2013.

Structural profile

The EU-27's telecommunication services sector (NACE Group 64.2) employed some 1.2 million persons in 2005. There were few working proprietors and unpaid family workers in this sector as practically all (98.1 %) members of the workforce were paid employees. This workforce generated EUR 421.2 billion of turnover in 2005 and EUR 200 billion of value added in 2006. As such, the telecommunications sector accounted for more than half of the value added in the media and communications sector (NACE Divisions 22 and 64), but less than one quarter of the workforce, indicating a very high apparent labour productivity.

The five largest EU economies also had the largest telecommunications sectors in 2006 in terms of

(10) COM(2008) 187.

Table 22.12: Telecommunications
Cost including VAT of a 10 minute call at 11 a.m. on a weekday, September 2006 (EUR)

	Local calls	National calls	International calls to USA
EU-25	0.36	0.74	1.79
BE	0.57	0.57	1.98
BG	:	:	:
CZ	0.56	0.56	2.02
DK	0.37	0.37	2.38
DE	0.39	0.49	0.46
EE	0.23	0.23	2.13
IE	0.49	0.82	1.91
EL	0.31	0.74	3.49
ES	0.19	0.85	1.53
FR	0.36	0.89	2.32
IT	0.22	1.15	2.12
CY	0.22	0.22	0.66
LV	0.36	1.03	5.94
LT	0.39	0.79	4.07
LU	0.31	:	1.37
HU	0.40	1.04	2.88
MT	0.25	:	1.64
NL	0.33	0.49	0.85
AT	0.49	0.59	1.90
PL	0.50	1.00	1.23
PT	0.37	0.65	3.11
RO	:	:	:
SI	0.26	0.26	1.40
SK	0.60	1.29	1.23
FI	0.24	0.94	4.90
SE	0.29	0.29	1.18
UK	0.44	0.44	2.23
NO (1)	0.34	0.34	0.77

(1) August 2005.

Source: Eurostat (Information society statistics, Structural indicators - original source Teligen Ltd.)

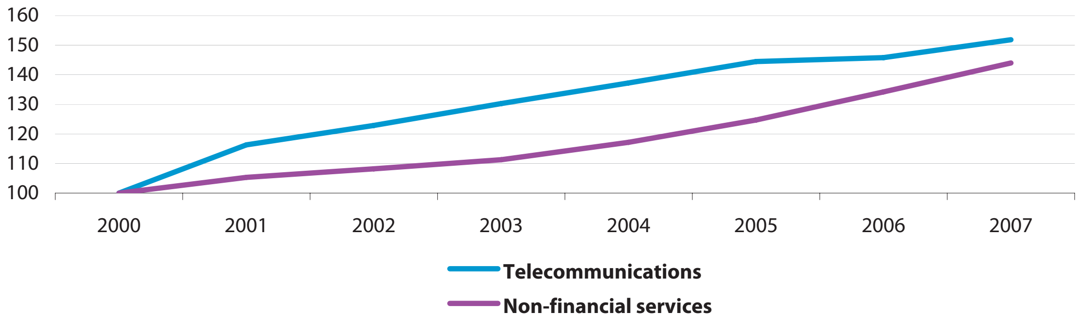
value added. The United Kingdom and Germany ranked first, each contributing around 18 % of the EU-27's total. The same two Member States had the largest workforces, both employing just over 200.0 thousand persons in telecommunications. The contribution of telecommunications services to non-financial business economy value added [11] was highest in Romania (6.6 %, 2005), Cyprus (5.2 %, 2005) and Greece (5.0 %), although it should be noted that no recent data are available for this sector for Bulgaria or Luxembourg that are traditionally quite highly specialised in telecommunications.

Annual short-term statistics are available for the index of turnover for telecommunication services for the years 2000 to 2007. The EU-27's turnover growth was uninterrupted during this period; with growth averaging 6.1 % per annum, some way above the 5.3 % average for non-financial services (NACE Sections G to I and Divisions 72 and 74). Growth was very constant between 2002 and 2005, before slowing in 2006 (0.9 %) and accelerating again in 2007 (4.2 %).

Expenditure and productivity

The EU-27's telecommunications sector recorded high tangible investment, valued at EUR 46.2 billion in 2005. The investment rate, showing the relation between investment and value added, was 24.3 % in 2005, the highest rate among the media and communications sectors presented in Subchapters 22.1 to 22.4, and the only one that was above the non-financial business economy average. Several Member States recorded particularly high investment rates in the telecommunications sector, most notably Romania, Cyprus (both 2005) and the United Kingdom where investment rates in this sector were more than double the national average for the non-financial business economy.

Figure 22.8: Telecommunications (NACE Group 64.2)
Index of turnover, EU-27 (2000=100)



Source: Eurostat (STS)

The EU-27's telecommunications sector recorded one of the highest average personnel costs (EUR 51.5 thousand per employee) within the non-financial business economy in 2005. Despite this, total personnel costs made up just 19.9 % of operating expenditure in the EU-27's telecommunications sector in 2005, the lowest share of the four media and communications sectors; this share was nevertheless still higher than the non-financial business economy average (17.1 %) in the same year. Apparent labour productivity was also very high in the telecommunications sector, the EUR 159.4 thousand of value added per person employed was the fourth highest among the non-financial business economy NACE groups in 2005 or 2006, and the highest of all of the non-financial services NACE groups. Despite these high average personnel costs, the telecommunications sector recorded a wage adjusted labour productivity ratio of 309.4 %, indicating that apparent labour productivity covered average personnel costs three times over. This was the fifth highest level of this ratio among the non-financial business economy NACE groups for which data are available. Without exception every Member State (with data available in 2005 or 2006) recorded a wage adjusted labour productivity ratio that was higher for the telecommunications sector than for the non-financial business economy as a whole.

Table 22.13: Publishing, printing, reproduction of recorded media (NACE Division 22)
Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	5.2	1.6	12.6	2.4	17.8	0.5	0.5	8.1	23.7	32.3	26.8	0.3	0.8	1.6
Persons employed	34.3	17.1	44.4	36.3	363.5	6.5	15.4	28.3	156.0	188.8	165.4	2.4	9.5	12.1
Turnover	6 894	421	2 602	4 483	50 434	304	15 846	3 334	19 146	34 445	29 548	171	340	369
Production	6 725	410	2 549	4 448	49 866	287	15 609	3 295	19 242	32 893	29 403	171	347	369
Purch. of goods & serv.	4 644	310	1 945	2 729	31 047	191	11 121	2 000	12 183	23 616	20 004	99	228	268
Value added	2 243	120	762	1 824	18 931	113	4 808	1 432	7 587	10 985	9 653	75	123	115
Personnel costs	1 426	51	443	1 375	13 148	75	812	551	4 659	9 057	5 238	50	63	69
Average personnel costs	48.6	3.2	12.9	38.9	37.6	11.7	53.3	27.1	33.1	49.0	40.9	21.3	6.6	6.2
Gross operating surplus	817	69	318	450	5 782	38	3 996	882	2 928	1 928	4 415	26	60	46
Gross investment	317	55	165	196	1 802	18	333	273	712	980	1 034	22	45	48
Apparent labour prod.	65.4	7.0	17.2	50.3	52.1	17.5	311.4	50.7	48.6	58.2	58.4	31.4	12.9	9.5
Wage adj. labour prod.	134.5	219.2	133.2	129.1	138.4	148.7	584.5	187.1	147.1	118.6	142.8	147.2	193.5	153.0
Gross operating rate	11.9	16.4	12.2	10.0	11.5	12.5	25.2	26.4	15.3	5.6	14.9	15.0	17.6	12.5
Investment rate	14.1	45.4	21.7	10.7	9.5	15.6	6.9	19.0	9.4	8.9	10.7	28.5	36.9	41.7

	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO
Enterprises	0.2	7.5	:	6.4	2.1	16.8	6.0	4.6	1.7	0.7	2.7	9.9	27.5	3.1
Persons employed	:	34.2	:	79.6	25.6	95.5	36.5	37.0	9.7	11.2	27.9	50.1	329.5	25.4
Turnover	:	2 016	:	12 805	4 820	4 927	2 564	1 123	790	667	4 419	7 507	47 882	5 034
Production	:	1 591	:	12 669	4 691	4 744	2 476	1 063	740	624	4 390	7 500	47 497	5 061
Purch. of goods & serv.	:	1 482	:	8 014	3 006	3 104	1 669	803	525	483	2 811	5 164	24 768	3 098
Value added	:	548	:	4 794	1 880	1 873	978	362	271	187	1 729	2 464	22 648	2 084
Personnel costs	:	337	:	3 123	1 165	767	682	164	189	106	1 181	1 924	13 326	1 518
Average personnel costs	:	11.1	:	44.5	48.0	10.2	19.5	4.5	21.1	9.6	43.3	44.4	42.7	61.6
Gross operating surplus	:	211	:	1 670	714	1 106	295	198	82	81	548	470	9 322	566
Gross investment	:	80	:	339	249	263	194	147	68	72	148	224	1 889	178
Apparent labour prod.	:	16.0	:	60.2	73.3	19.6	26.8	9.8	27.8	16.7	62.0	49.1	68.7	81.9
Wage adj. labour prod.	:	143.8	:	135.5	152.7	193.1	137.7	215.9	131.6	174.7	143.4	110.6	160.9	132.9
Gross operating rate	:	10.4	:	13.0	14.8	22.4	11.5	17.6	10.4	12.1	12.4	6.3	19.5	11.2
Investment rate	:	14.6	:	7.1	13.2	14.0	19.8	40.7	25.0	38.6	8.5	9.1	8.3	8.5

(1) Netherlands and Poland, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)

Table 22.14: Post and telecommunications (NACE Division 64)
Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	3.6	1.3	1.0	1.4	9.4	0.1	1.5	0.7	6.7	6.0	5.0	0.1	0.4	0.4
Persons employed	76.3	45.1	71.4	56.0	648.6	7.9	27.9	40.2	165.2	423.2	268.8	4.0	14.9	16.4
Turnover	18 804	1 892	5 772	8 961	95 456	712	9 028	8 910	42 188	72 130	65 615	508	848	964
Production	18 795	1 781	5 619	8 750	83 679	693	4 828	7 199	33 033	72 635	61 562	509	779	899
Purch. of goods & serv.	10 696	988	2 911	5 458	54 575	408	6 233	5 089	22 201	37 282	34 811	111	431	562
Value added	8 370	918	3 013	4 186	48 798	308	2 775	3 994	20 315	37 206	30 876	398	430	418
Personnel costs	4 193	200	973	2 251	21 140	88	1 373	1 626	5 579	20 459	10 641	166	102	122
Average personnel costs	57.6	4.6	14.9	40.9	33.6	11.2	51.4	41.1	34.9	48.4	40.5	41.4	6.9	7.5
Gross operating surplus	4 177	718	2 040	1 935	27 658	220	1 401	2 368	14 736	16 747	20 235	232	328	296
Gross investment	1 037	352	561	587	6 451	85	639	816	3 757	5 332	5 055	131	137	109
Apparent labour prod.	109.6	20.4	42.2	74.8	75.2	38.8	99.3	99.3	123.0	87.9	114.9	99.1	28.9	25.5
Wage adj. labour prod.	190.5	445.4	282.2	182.6	224.2	348.0	193.3	241.4	352.1	181.5	283.7	239.3	420.5	340.9
Gross operating rate	22.2	37.9	35.3	21.6	29.0	30.9	15.5	26.6	34.9	23.2	30.8	45.7	38.7	30.7
Investment rate	12.4	38.4	18.6	14.0	13.2	27.5	23.0	20.4	18.5	14.3	16.4	33.0	31.8	26.1
	LU	**HU**	**MT**	**NL**	**AT**	**PL**	**PT**	**RO**	**SI**	**SK**	**FI**	**SE**	**UK**	**NO**
Enterprises	0.1	2.3	:	4.1	0.6	4.5	1.5	3.5	0.7	0.1	0.7	1.0	16.2	1.7
Persons employed	4.4	61.6	:	123.2	48.4	165.7	33.2	87.1	12.5	27.5	41.6	82.6	475.3	38.6
Turnover	2 187	5 450	:	23 860	9 652	11 671	8 303	4 640	1 536	1 935	7 868	13 194	108 929	9 389
Production	1 946	3 943	:	23 427	6 553	10 970	8 019	4 270	1 399	1 753	7 644	13 069	100 949	9 317
Purch. of goods & serv.	1 053	3 182	:	13 124	5 535	5 359	4 945	2 327	832	962	5 747	7 432	61 141	5 399
Value added	1 119	2 395	:	10 778	4 417	6 512	3 638	2 348	696	992	2 865	6 062	48 468	3 986
Personnel costs	277	922	:	3 905	2 300	1 935	1 104	678	300	306	1 508	3 364	24 734	1 785
Average personnel costs	62.6	15.3	:	32.3	48.0	12.5	33.6	7.9	25.1	11.1	36.3	45.3	53.0	47.2
Gross operating surplus	842	1 474	:	6 873	2 117	4 577	2 535	1 670	396	687	1 357	2 698	23 734	2 201
Gross investment	319	575	:	2 121	888	1 216	916	1 985	218	339	461	985	12 498	692
Apparent labour prod.	251.5	38.9	:	87.5	91.3	39.3	109.6	27.0	55.7	36.1	68.8	73.4	102.0	103.3
Wage adj. labour prod.	401.8	253.4	:	270.5	190.3	313.8	326.7	343.0	222.1	324.4	189.3	161.8	192.4	218.9
Gross operating rate	38.5	27.0	:	28.8	21.9	39.2	30.5	36.0	25.8	35.5	17.2	20.5	21.8	23.4
Investment rate	28.5	24.0	:	19.7	20.1	18.7	25.2	84.6	31.4	34.1	16.1	16.3	25.8	17.4

(1) Cyprus and Poland, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)