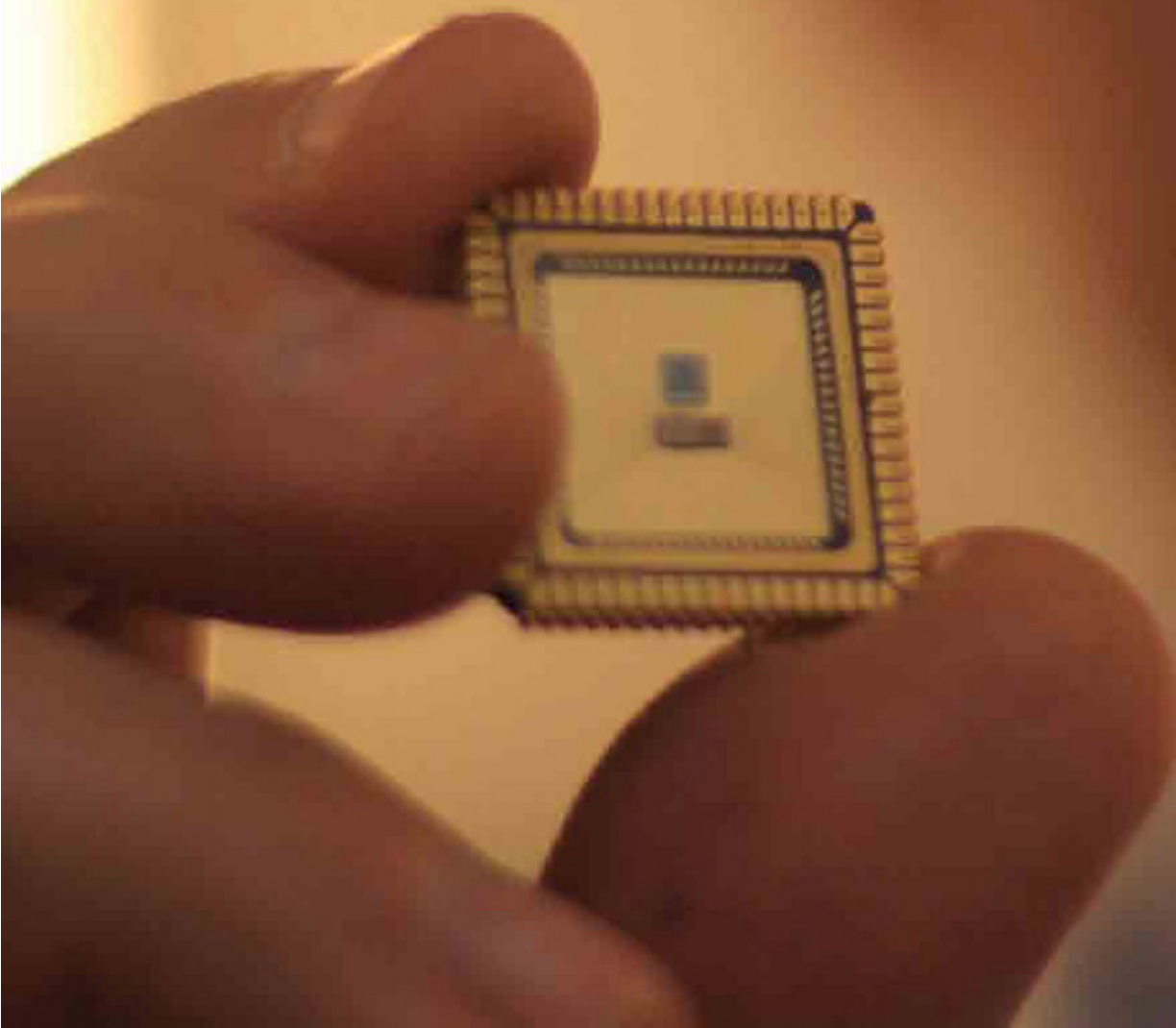


Structural business statistics

6





Structural business statistics (SBS) cover industry, construction and non-financial services, collectively referred to as the non-financial business economy. Presented according to the activity classification, NACE, these statistics describe the structure, conduct and performance of businesses. Structural business statistics can be analysed at a very detailed sectoral level (several hundred economic activities), by enterprise size class or by region.

There are significant disparities between European Union (EU) regions in terms of the importance of different activities within their non-financial business economies. While some activities — such as retail trade — are spread relatively evenly across most regions, many others exhibit a considerable variation in their level of concentration, often with a few regions having a particularly high degree of specialisation. The reasons for regional specialisation are varied and include the availability of natural resources (for example for mining and quarrying and forest-based manufacturing), the availability of skilled employees (for example for scientific research and development), costs (for wages and other inputs), infrastructure (for example for transport or telecommunications), legislation, climatic and topographic conditions (particularly regarding tourism-related activities) and the proximity to markets.

Main statistical findings

According to estimates made using annual structural business statistics, there were approximately 21.8 million enterprises active in the EU-27's non-financial business economy in 2010. Together, they generated EUR 5 934 billion of gross value added and employed some 132.5 million persons. According to national accounts, industry accounted for 19.2% of the total value added (at basic prices) generated across the whole economy (in other words, including financial services and services such as defence, health or education), construction for a 6.2% share and non-financial services for about 44.2%

Industrial and services specialisation

A regional analysis of the non-financial business economy workforce between the industrial sector, the construction sector and the non-financial services sector for 2010 is shown in Maps 6.1–6.3; no data are available for Malta, while data for the Greek, Dutch and Bulgarian construction sector refer to 2009. On the basis of this information, non-financial services accounted for almost two thirds of the non-financial business economy workforce (65.2%), followed by industry with just under a quarter of the total (24.6%), while the construction sector accounted for the smallest share (10.1%).

Among the 261 regions in the EU for which NUTS level 2 data are available, just over one in five (or 57 regions) reported that industrial activities accounted for a share in excess of 35.0% of the non-financial business economy workforce. The highest regional share for industrial activities in 2010 was 47.0% in Severovýchod (in the north-east of the Czech Republic); together with the central Moravian region of Střední Morava (also in the Czech Republic) and two regions in Romania (Vest and Sud – Muntenia), these were the only NUTS level 2 regions where more than 45.0% of the non-financial business economy workforce was employed in an industrial activity.

Eastern European regions often reported some of the highest shares in relation to the industrial economy's weight in the non-financial business economy workforce in 2010. Indeed, the southern German regions of Tübingen and Oberfranken were the only regions from EU-15 Member States to record an employment share for industrial activities of more than 40.0%. The relatively high degree of employment in industrial activities was most pronounced in the Czech Republic (seven regions above 40.0%), Poland and Romania (each with five regions), Bulgaria (three regions) and Hungary (two regions), as well as Slovakia and Slovenia (each with a single region).

There were 42 regions in the EU where 15.0% or less of the non-financial business economy workforce was active in an industrial activity; this was often the case in capital city regions. In 13 of these 42 regions, the industrial economy accounted for less than 1 in 10 persons within the non-financial business economy workforce. These were spread across seven different EU Member States — with the lowest share recorded in the Ciudad Autónoma de Melilla (Spain), at just 1.7%. There were two other Spanish regions where the share of industry in the non-financial business economy workforce was less than 10.0% and these are both renowned tourist destinations, namely the islands of the Canarias and the Illes Balears. Other tourist destinations characterised as having relatively low shares of employment within the industrial economy included three Greek island regions — two in the Aegean Sea (Voreio Aigaio and Notio Aigaio) and one in the Ionian Sea (Ionia Nisia) — the French island of Corse and the Algarve region in southern Portugal. The remaining five regions which reported less than 10.0% of their respective non-financial business economy workforce working in the industrial economy included the capital city regions of Belgium (Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest), the Netherlands (Noord-Holland) and the United Kingdom (both Inner and Outer London), as well as Utrecht (which is located to the south-east of Amsterdam and also forms part of the Randstad conurbation in the Netherlands).

The Norwegian capital city region of Oslo og Akershus also stood out for its relatively low share (8.7%) of industrial employment in the non-financial business economy; none of the



remaining regions in Norway recorded a share of less than 15.0% in 2010, as the weight of industry in the non-financial business economy workforce ranged from 18.9% (Nord-Norge) to a high of 34.3% in Agder og Rogaland (the south-west of Norway) — where a large part of the Norwegian petroleum industry is based. Among the remaining EFTA countries, the only information available within structural business statistics for Switzerland is at a national level: this shows that the respective share of industrial employment was 27.6% in 2010. Within the acceding and candidate countries, the only information available within structural business statistics relates to Croatia (also national data): the employment share of industrial activities in the Croatian non-financial business economy total was 31.1%.

Map 6.2 shows the employment share of construction activities in 2010. There were 31 regions in the EU where construction activities accounted for more than 16.0% of the non-financial business economy workforce. These were located in a small group of Member States, with 14 regions in France, nine in Spain, three each in Italy and Portugal and a single region in Belgium and in Luxembourg (the latter is a single region at NUTS level 2). The highest share of construction activities in the non-financial business economy workforce was recorded in the French island regions of Corse (24.5%) and Guyane (21.5%), while the French region of Languedoc-Roussillon, the Spanish regions of Extremadura and the Ciudad Autónoma de Melilla, and the Portuguese Região Autónoma dos Açores were the only other regions where in excess of one in five persons within the non-financial business economy were employed in the construction sector.

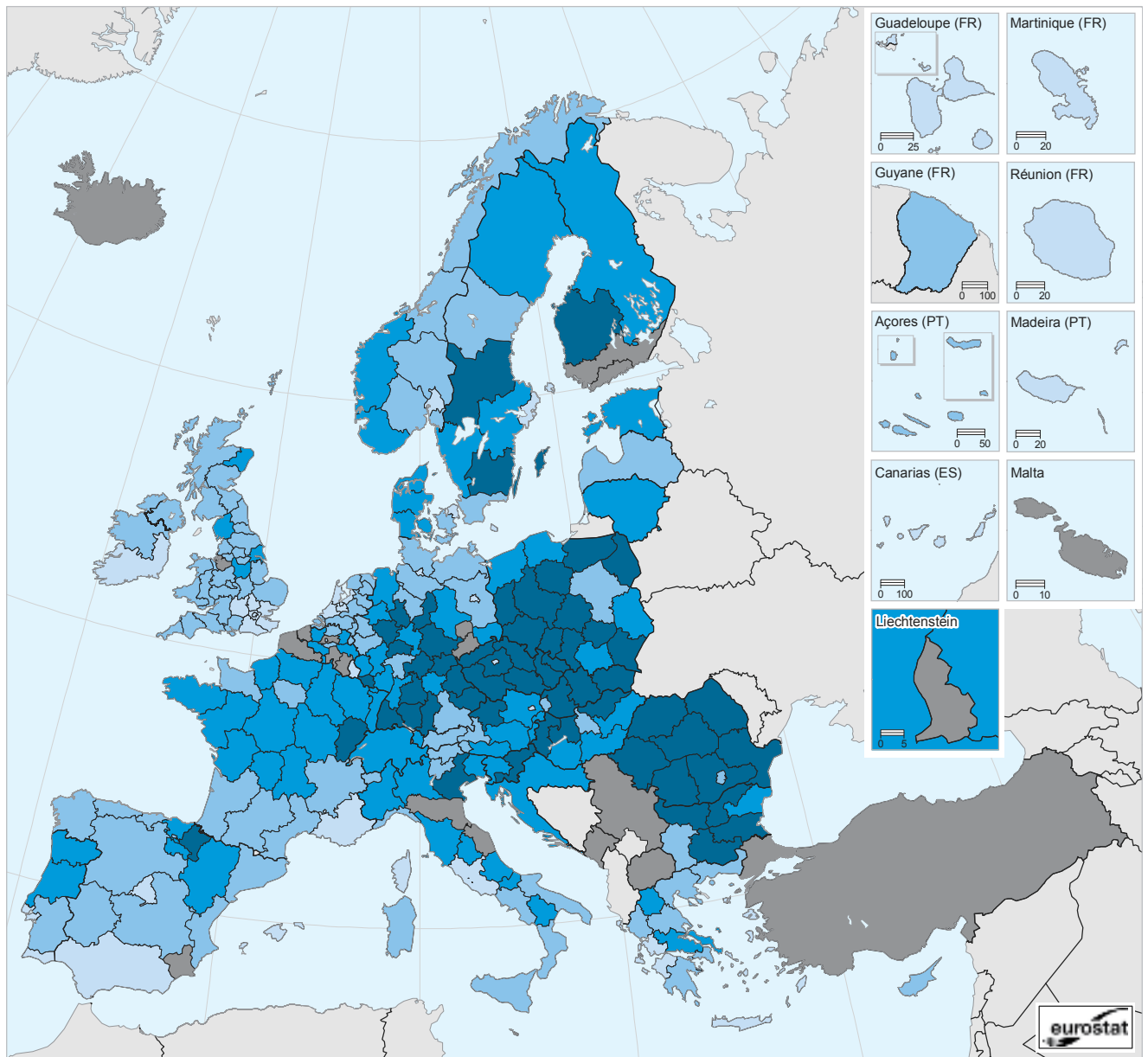
There were 100 regions across the EU where the construction sector accounted for 1 in 10 or fewer of the non-financial business economy workforce. Just over half of these (53 regions) recorded an employment share for construction that was less than or equal to 8.0% — as shown by the lightest shaded regions in Map 6.2. The vast majority of these were either in Germany (24 regions) or the United Kingdom (18 regions), while there were also three regions from the Netherlands, two regions from each of Belgium and Ireland, and a single region each from Denmark, France, Hungary and Slovakia. Each of these Member States reported a low share of employment in construction activities within their capital city region (this may be linked to enterprises having their offices, vehicle parks and yards for stocking construction materials outside of capital city regions given the premium on land prices or rental prices in capital cities and major conurbations); Közép-Magyarország (Hungary, 7.7%), Hovedstaden (Denmark, 7.6%), Bratislavský kraj (Slovakia, 7.5%), the Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest (Belgium, 7.3%), Noord-Holland (the Netherlands, 7.0%), Berlin (Germany, 6.0%), the Île de France (France, 5.9%), Southern and Eastern (Ireland, 5.4%) and Inner London (the United Kingdom, 3.8%).

The German urban region of Hamburg recorded the lowest share of persons working in the construction sector (3.7% of the non-financial business economy workforce in 2010), while four other German regions reported employment shares of less than 5.0% — Bremen, Köln, Darmstadt and Mittelfranken — as did Inner London and the Border, Midland and Western region of Ireland. Both Irish regions featured among the 10 EU regions with the lowest shares of employment in construction. This was in stark contrast to the prominence of the construction sector in Ireland during the period from the late 1990s through to 2007, when the country experienced a construction boom and had some of the highest levels of construction activity in Europe. Despite the end of a similar construction boom in Spain, the share of the construction sector in non-financial business economy employment remained above the EU average in all Spanish regions, although the share of construction fell in nearly all of the Spanish regions following the financial and economic crisis.

The most service-oriented non-financial business economy workforces were mainly in or bordering major urban areas (and especially capital city regions) — for example London and the surrounding south-east of England, Hamburg and Berlin in Germany, Noord-Holland (including Amsterdam) and Utrecht in the Netherlands, or the Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest in Belgium. The highest share of non-financial services in the non-financial business economy workforce in 2010 was 93.2% in Inner London. High shares of employment in non-financial services were also found in many regions often associated with tourism, particularly island regions, including Notio Aigaio, Ionia Nisia, Kriti and Voreio Aigaio in Greece, the Canarias in Spain and the Algarve in Portugal.

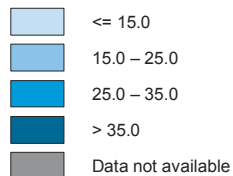
Non-financial services accounted for more than 75.0% of the non-financial business economy workforce in 39 regions across the EU in 2010, among which were 12 capital city regions from the United Kingdom (93.2%), Belgium (83.8%), the Netherlands (83.1%), Denmark (80.3%), Germany (79.8%), Ireland (79.6%), Spain (79.1%), Portugal (79.1%), Austria (78.2%), Sweden (77.6%), Slovakia (77.4%) and the Czech Republic (75.3%). Alongside these, the remaining 27 regions with a high proportion of employment in non-financial services (as shown by the darkest shade in Map 6.3) included a further 11 regions from the United Kingdom, four regions in the Greek islands, three additional regions from each of Germany, Spain and the Netherlands, one additional region each from Belgium and from Portugal and a single region from Finland; the Norwegian capital city region of Oslo og Akershus (80.9%) also recorded in excess of three quarters of its non-financial business economy workforce employed within non-financial services in 2010.

Map 6.1: Employment in the industrial economy, by NUTS 2 regions, 2010 ⁽¹⁾
 (% share of the non-financial business economy)



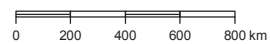
(% share of the non-financial business economy)

EU = 24.6



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Cartography: Eurostat — GISCO, 05/2013

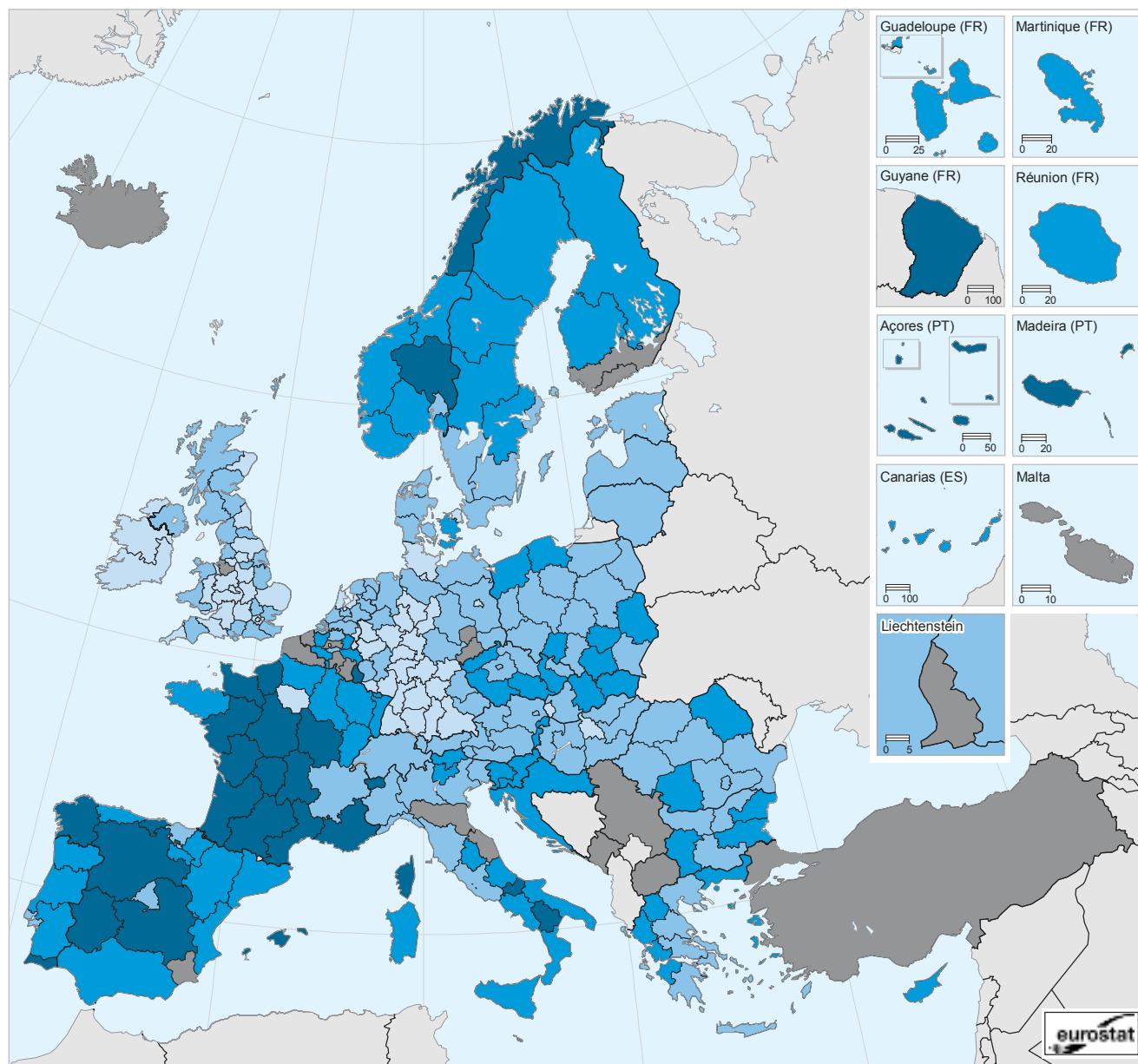


⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Switzerland and Croatia, national level.

Source: Eurostat (online data code: [sbs_r_nuts06_r2](#))



Map 6.2: Employment in construction, by NUTS 2 regions, 2010 ⁽¹⁾
 (% share of the non-financial business economy)

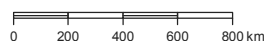


(% share of the non-financial business economy)

EU = 10.1



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 Cartography: Eurostat — GISCO, 05/2013



⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Switzerland and Croatia, national level.
 Source: Eurostat (online data code: sbs_r_nuts06_r2)



In total there were 29 regions in the EU where the non-financial services share of employment was 50.0% or less (the lightest shade in Map 6.3). There were eight regions across the EU where the share of employment attributed to non-financial services was 45.0% or less in 2010: half of these were located in the Czech Republic, while there were two Romanian regions and a single region from each of Slovenia and Slovakia. The lowest shares were recorded in the Czech regions of Střední Morava (41.2%) and Severovýchod (41.4%) — which had reported the highest shares for industrial employment. The non-financial services share of employment was consistently above 50.0% in each of the EFTA and the acceding or candidate countries for which data are available (national data), while this was also true for each of the Norwegian regions.

Detailed specialisation within the non-financial business economy

Table 6.1 presents a more detailed activity analysis, at the NACE section and division levels. For each activity, the table indicates the median and mean share of that activity in the non-financial business economy workforce across all regions. The final two columns in the table show for each activity which region was the most specialised, providing the employment share of that activity in relation to the non-financial business economy workforce in that region.

Mining and quarrying activities of energy-producing and metallic minerals tend to be very concentrated as a consequence of the geographical location of deposits, and therefore only a small number of regions tend to be highly specialised in these activities; this often results in a handful of regions accounting for a relatively high share of sectoral employment. The most notable examples include the mining of coal and lignite in Śląskie (Poland) or mining support services in North Eastern Scotland (the United Kingdom) — the latter provides support for the offshore extraction of crude petroleum and natural gas in the North Sea.

Manufacturing activities that involve the primary processing stages of agricultural, fishing or forestry products tend to be concentrated in areas close to the source of the raw material. The regions most specialised in food manufacturing (NACE Division 10) were often located in rural areas or close to agricultural production centres: for example Bretagne (in north-west France), Podlaskie (eastern Poland), Dél-Alföld in Hungary, Alentejo in Portugal, Severen tsentralen in Bulgaria or Lincolnshire in the United Kingdom. Heavily forested Nordic and Baltic regions and mountainous central Slovakian regions were among the most specialised regions for the manufacture of wood and wood products (NACE Division 16) and for the related manufacturing of paper and paper

products (NACE Division 17). Stredné Slovensko (Slovakia) was the most specialised region for wood and wood products and Norra Mellansverige (Sweden) was the most specialised for pulp and paper.

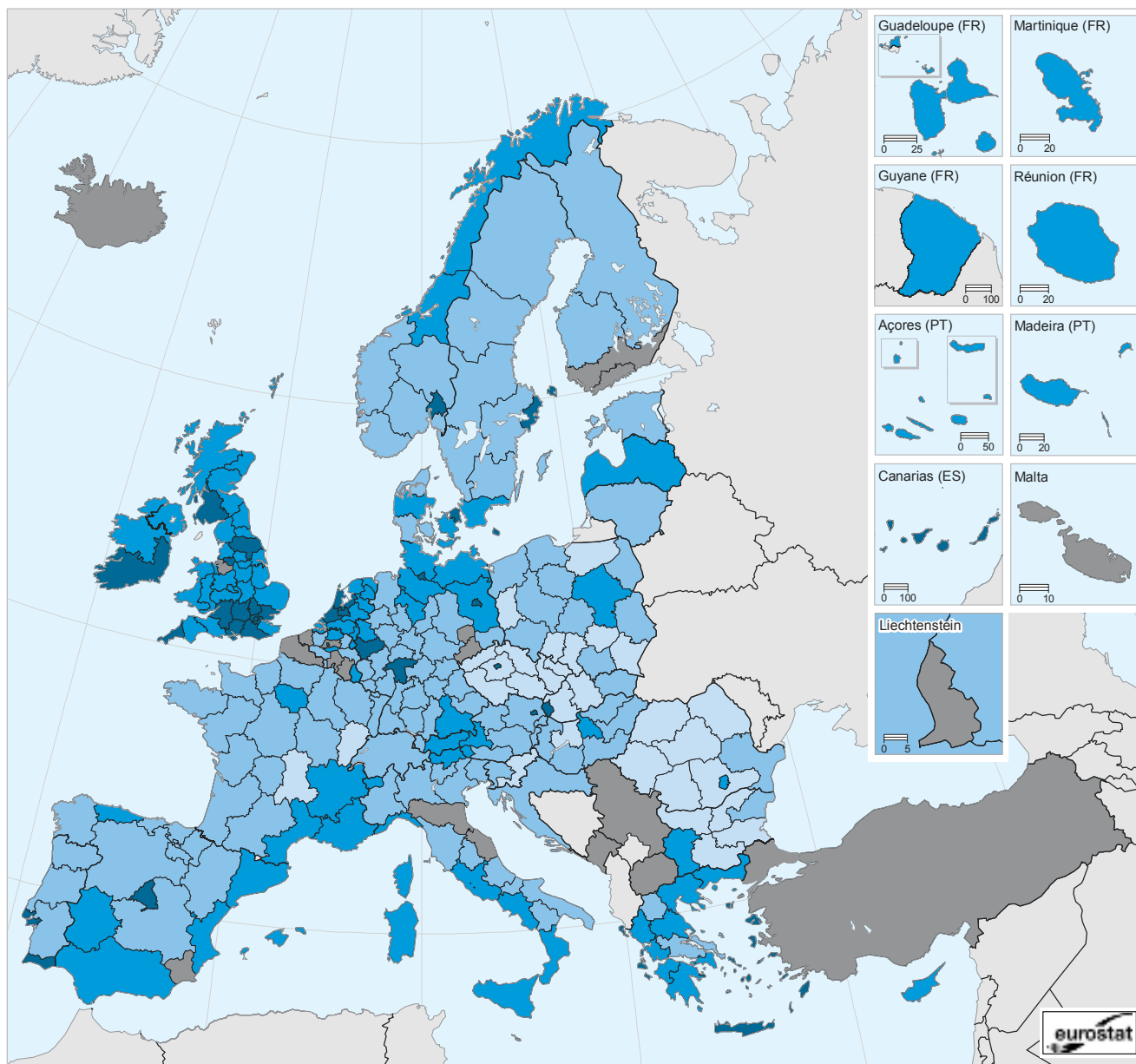
Construction activities (NACE Divisions 41 to 43) accounted for almost one in four of the non-financial business economy's workforce in Corse (France) in 2010 and for relatively high shares in several Spanish and Portuguese regions (for example Extremadura in Spain or the Região Autónoma da Madeira in Portugal).

Transport services are also influenced by location, with water transport (NACE Division 50) naturally being important for coastal regions and islands, while air transport (NACE Division 51) is generally important for regions with or close to major cities, but also for island regions (especially those focused on tourism). The small island region of Åland (Finland) is a centre for ferry services between Sweden and Finland and other Baltic Sea traffic — it was very highly specialised in water transport, which accounted for 32.4% of the total number of persons employed in this region's non-financial business economy in 2010, many times more than the next most specialised region. Outer London was the region most specialised in air transport, while other regions with a high share of their non-financial business economy workforce in air transport included Noord-Holland (the Dutch region including Amsterdam), Köln in Germany and Niederösterreich in Austria. The German region of Köln (which includes the city of Bonn, which is home to Deutsche Post DHL) was particularly specialised in postal and courier activities, which accounted for more than 1 in 10 of all employment in the non-financial business economy workforce.

Regions traditionally associated with tourism, for example in Greece, Italy, Portugal and Spain, were the most specialised in accommodation services (NACE Division 55) and food and beverage service activities (NACE Division 56). The relative importance of tourism to many of these regions has been all the more important in recent years, given the effects of the financial and economic crisis. The south Aegean region of Greece (Notio Aigaió — which includes, among others, the islands of Kos, Mykonos and Rhodes) recorded the highest share of non-financial business economy employment in accommodation and food and beverage service activities. These services also accounted for a relatively high share of the non-financial business economy workforce in the Alpine regions of the Provincia Autonoma Bolzano/Bozen (Italy) and Tirol (Austria), the island regions of Illes Balears (Spain) and the Região Autónoma da Madeira (Portugal), as well as the Algarve in Portugal, the Scottish Highlands and Islands (the United Kingdom) and the German coastal region of Mecklenburg-Vorpommern.



Map 6.3: Employment in the non-financial services economy, by NUTS 2 regions, 2010 ⁽¹⁾
 (% share of the non-financial business economy)

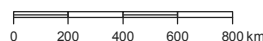


(% share of the non-financial business economy)

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 Cartography: Eurostat — GISCO, 05/2013

EU = 65.2

- <= 50.0
- 50.0 – 62.5
- 62.5 – 75.0
- > 75.0
- Data not available



⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Switzerland and Croatia, national level.
 Source: Eurostat (online data code: sbs_r_nuts06_r2)



Specialisation in information and communication activities (NACE Divisions 58 to 63), real estate activities (NACE Section L), professional scientific and technical activities (NACE Divisions 69 to 75) and administrative and support service activities (NACE Divisions 77 to 82) is sometimes based on access to a critical mass of clients (enterprises or households) or access to a specific knowledge base (external researchers and/or qualified staff). Inner London in the United Kingdom was the most specialised region for multimedia publishing (NACE Division 59), while Utrecht in the Netherlands had the highest proportion of its regional non-financial business economy workforce employed within computer activities (NACE Division 62). The Belgian capital city region of Région de Bruxelles-Capitale/Brussels Hoofdstedelijk Gewest and Köln in Germany were the most specialised in telecommunications (NACE Division 61); the latter boosted by the presence of Deutsche Telekom's headquarters in Bonn. Latvia was the most specialised region for real estate activities, while British regions were the most specialised in nearly all of the professional, scientific and technical activities: Inner London for legal and accounting activities (NACE Division 69), activities of head offices (NACE Division 70), advertising and market research (NACE Division 73), and other professional, scientific and technical activities (NACE Division 74); North Eastern Scotland for architectural and engineering activities (NACE Division 71) — which (among other services) provides services for North Sea oil and gas platforms; and East Anglia (which includes Cambridge) for scientific research and development (NACE Division 72). The Province/Provincie Luxembourg in southern Belgium was the most specialised region for veterinary activities (NACE Division 75).

The Portuguese capital city region of Lisboa was the most specialised in administrative and support service activities (NACE Section N), with 22.6% of its non-financial business economy workforce employed in these activities. At a more detailed level, Groningen (the Netherlands) was particularly specialised in employment activities (NACE Division 78) and the Romanian capital city region of Bucureşti - Ilfov had the highest proportion of its non-financial business economy workforce engaged in security and investigation services (NACE Division 80).

Range of specialisation

Figure 6.1 provides an overview of the relative importance of economic activities at the NACE section level in the non-financial business economy workforce. For each activity, the horizontal lines indicate the spread from the region with the lowest share of that activity in its non-financial business

economy workforce to the region with the highest share; the region with the highest share is also named in the figure. The extremes of the highest and lowest shares can be influenced by a single region, and the coloured box shows a narrower range, defined to cover half of the regions (the inter-quartile range), with one quarter of all regions having a higher employment share in that activity and one quarter of the regions having a lower share. The central bar within the coloured box shows the value of the median region. The activities are ranked from the largest employer (distributive trades) to the smallest (mining and quarrying).

The situation in manufacturing is particular in several ways. The range between the least and most specialised region is very wide for manufacturing as is the breadth of the coloured box, indicating the varying degrees of importance for manufacturing across EU regions. By contrast, the employment spread for large, basic activities, like construction and distributive trades, which tend to serve more local clients, was much narrower, both in terms of the spread of the extreme values (shown by the horizontal lines) and in terms of the breadth of the inter-quartile range (the coloured box containing half of the regions).

Manufacturing (NACE Section C) accounted for shares in the total number of persons employed in the non-financial business economy between 1.5% and 44.4% — the latter was recorded for Severovýchod (the Czech Republic). Transport and storage (NACE Section H) and mining and quarrying (NACE Section B) are also activities where a few regions tend to be very highly specialised. The highest specialisation for transport and storage was in the small Finnish island region of Åland, where almost two fifths of the workforce (39.6%) was employed in this sector; the specialisation in Åland is due almost exclusively to the importance of water transport. Natural endowments play an important role in mining and quarrying and, as such, many regions record little or no such activity, with a few regions being highly specialised on account of deposits of metallic ores, coal, oil or gas. Mining and quarrying accounted for 13.9% of the non-financial business economy workforce in North Eastern Scotland (the United Kingdom), while the median share across all EU regions was 0.3%.

By contrast, the spread of employment was much narrower for distributive trades (NACE Section G), which was the activity displaying the highest median employment share, as these activities were present on a relatively large scale in all regions. Employment shares for distributive trades ranged from a low of 16.1% to just over two fifths (40.2%) of the non-financial business economy workforce in Dytiki Ellada (western Greece).

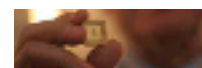


Table 6.1: Average share of non-financial business economy employment and most specialised regions by activity (NACE sections and divisions) and by NUTS 2 regions, 2010 (1)
(% share of non-financial business economy employment)

Activity (NACE code)	Across EU regions		Most specialised region	
	Median share	Mean share	Name (NUTS level 2)	Share in regional non-financial business economy employment (%)
Mining and quarrying (B)	0.3	0.6	North Eastern Scotland (UKM5)	13.9
Mining of coal and lignite (05)	0.0	0.2	Śląskie (PL22)	9.5
Extraction of crude petroleum and natural gas (06)	0.0	0.1	North Eastern Scotland (UKM5)	4.7
Mining of metal ores (07)	0.0	0.0	Övre Norrland (SE33)	c
Other mining and quarrying (08)	0.2	0.2	Świętokrzyskie (PL33)	1.3
Mining support service activities (09)	0.0	0.1	North Eastern Scotland (UKM5)	9.0
Manufacturing (C)	22.1	23.0	Severovýchod (CZ05)	44.4
Manuf. of food (10)	3.2	3.4	Bretagne (FR52)	13.9
Manuf. of beverages (11)	0.3	0.4	Dytiki Ellada (ES23)	3.0
Manuf. of tobacco products (12)	0.0	0.1	Trier (DEB2)	c
Manuf. of textiles (13)	0.3	0.5	Prov. West-Vlaanderen (BE25)	3.9
Manuf. of wearing apparel (14)	0.3	0.8	Severozapaden (BG31)	9.8
Manuf. of leather and leather products (15)	0.1	0.3	Nord-Vest (RO11)	3.9
Manuf. of wood and wood products (16)	0.7	1.0	Stredné Slovensko (SK03)	4.4
Manuf. of paper and paper products (17)	0.4	0.5	Norra Mellansverige (SE31)	3.9
Printing and reproduction of recorded media (18)	0.6	0.6	West Yorkshire (UKE4)	2.1
Manuf. of coke and refined petroleum products (19)	0.0	0.1	Peloponnisos (EL25)	1.0
Manuf. of chemicals and chemical products (20)	0.6	0.8	Rheinhessen-Pfalz (DEB3)	8.3
Manuf. of pharmaceutical products and preparations (21)	0.2	0.4	Prov. Brabant Wallon (BE31)	10.8
Manuf. of rubber and plastic products (22)	1.1	1.3	Auvergne (FR72)	11.4
Manuf. of other non-metallic mineral products (23)	1.0	1.1	Świętokrzyskie (PL33)	4.6
Manuf. of basic metals (24)	0.5	0.9	Norra Mellansverige (SE31)	9.8
Manuf. of fabricated metal products (25)	2.5	2.7	Franche-Comté (FR43)	8.0
Manuf. of computer, electronic and optical products (26)	0.6	0.8	Észak-Magyarország (HU31)	5.4
Manuf. of electrical equipment (27)	0.7	1.0	Oberpfalz (DE23)	7.6
Manuf. of other machinery and equipment (28)	1.4	2.0	Tübingen (DE14)	11.8
Manuf. of motor vehicles, trailers and semi-trailers (29)	0.7	1.6	Braunschweig (DE91)	c
Manuf. of other transport equipment (30)	0.3	0.5	Midi-Pyrénées (FR62)	5.7
Manuf. of furniture (31)	0.6	0.8	Warmińsko-Mazurskie (PL62)	7.8
Other manufacturing (32)	0.5	0.6	Border, Midland and Western (IE01)	5.4
Repair and installation of machinery (33)	0.8	0.9	Mittelfranken (DE25)	4.0
Electricity, gas, steam and air conditioning supply (D)	0.7	0.8	Sud-Vest Oltenia (RO41)	4.5
Water supply, sewerage, waste management (E)	0.9	1.0	Sud-Est (RO22)	3.0
Water supply (36)	0.2	0.3	Severozapaden (BG31)	1.8
Sewerage (37)	0.1	0.1	Trier (DEB2)	0.8
Waste management (38)	0.6	0.6	Sicilia (ITG1)	1.9
Remediation (39)	0.0	0.0	Valle d'Aosta/Vallée d'Aoste (ITC2)	0.4



Table 6.1: Average share of non-financial business economy employment and most specialised regions by activity (NACE sections and divisions) and by NUTS 2 regions, 2010 ⁽¹⁾ (cont.)
(% share of non-financial business economy employment)

Construction (F)	10.8	11.3	Corse (FR83)	24.5
Construction of buildings (41)	2.8	3.4	Extremadura (ES43)	11.6
Civil engineering (42)	1.3	1.4	Região Autónoma da Madeira (PT30)	5.5
Specialised construction activities (43)	5.8	6.5	Corse (FR83)	21.1
Distributive trades (G)	25.7	25.8	Dytiki Ellada (EL23)	40.2
Motor trades and repair (45)	3.1	3.1	Prov. Luxembourg (BE34)	5.4
Wholesale trade (46)	7.4	7.6	Kentriki Makedonia (EL12)	15.4
Retail trade (47)	14.6	15.1	Nord - Pas-de-Calais (FR30)	28.9
Transport and storage (H)	7.2	7.6	Åland (FI20)	39.6
Land transport and pipelines (49)	4.2	4.3	Lietuva (LT00)	8.4
Water transport (50)	0.1	0.3	Åland (FI20)	32.4
Air transport (51)	0.0	0.2	Outer London (UKI2)	3.4
Supporting transport activities (52)	1.5	1.7	Bremen (DE50)	10.8
Postal and courier activities (53)	1.1	1.1	Köln (DEA2)	11.6
Accommodation and food service activities (I)	7.5	8.4	Notio Aigaio (EL42)	32.7
Accommodation (55)	1.5	2.3	Notio Aigaio (EL42)	18.2
Food and beverage service activities (56)	5.8	6.1	Notio Aigaio (EL42)	15.4
Information and communication (J)	2.5	3.3	Inner London (UKI1)	14.6
Publishing activities (58)	0.4	0.6	Gießen (DE72)	4.4
Multimedia publishing (59)	0.1	0.2	Inner London (UKI1)	2.9
Programming and broadcasting (60)	0.1	0.1	Ciudad Autónoma de Melilla (ES64)	1.4
Telecommunications (61)	0.5	0.6	Région de Bruxelles-Capitale / Brussels Hoofdstedelijk Gewest (BE10)	4.7
Computer activities (62)	1.1	1.5	Utrecht (NL31)	8.4
Information service activities (63)	0.2	0.3	Wien (AT13)	1.5
Real estate activities (L)	1.8	1.8	Latvija (LV00)	5.8
Professional, scientific and technical activities (M)	6.9	7.4	Inner London (UKI1)	24.4
Legal and accounting activities (69)	2.2	2.3	Inner London (UKI1)	8.8
Activities of head offices (70)	1.0	1.3	Inner London (UKI1)	6.4
Architectural and engineering activities (71)	1.9	2.1	North Eastern Scotland (UKM5)	11.8
Scientific research and development (72)	0.2	0.3	East Anglia (UKH1)	2.1
Advertising and market research (73)	0.5	0.7	Inner London (UKI1)	3.3
Other professional, scientific and technical activities (74)	0.6	0.6	Inner London (UKI1)	1.7
Veterinary activities (75)	0.1	0.2	Prov. Luxembourg (BE34)	c
Administrative and support service activities (N)	8.0	8.5	Lisboa (PT17)	22.6
Rental and leasing activities (77)	0.4	0.5	Ionia Nisia (EL22)	c
Employment activities (78)	1.9	2.7	Groningen (NL11)	14.2
Travel agency and related activities (79)	0.3	0.4	Ionia Nisia (EL22)	2.0
Security and investigation (80)	0.8	1.0	București - Ilfov (RO32)	5.0
Service to buildings and landscape activities (81)	2.7	2.7	Berlin (DE30)	7.7
Other administrative and business activities (82)	1.1	1.3	Lisboa (PT17)	8.0
Repair of computers and personal and household goods (95)	0.3	0.3	Limousin (FR63)	1.4

⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Chemnitz (DED4), Leipzig (DED5), Emilia-Romagna (ITH5), Marche (ITI3), Helsinki-Uusimaa (FI1B), Malta, Etelä-Suomi (FI1C), Pohjois- ja Itä-Suomi (FI1D), Cheshire (UKD6) and Merseyside (UKD7), not available.

Source: Eurostat (online data code: sbs_r_nuts06_r2)

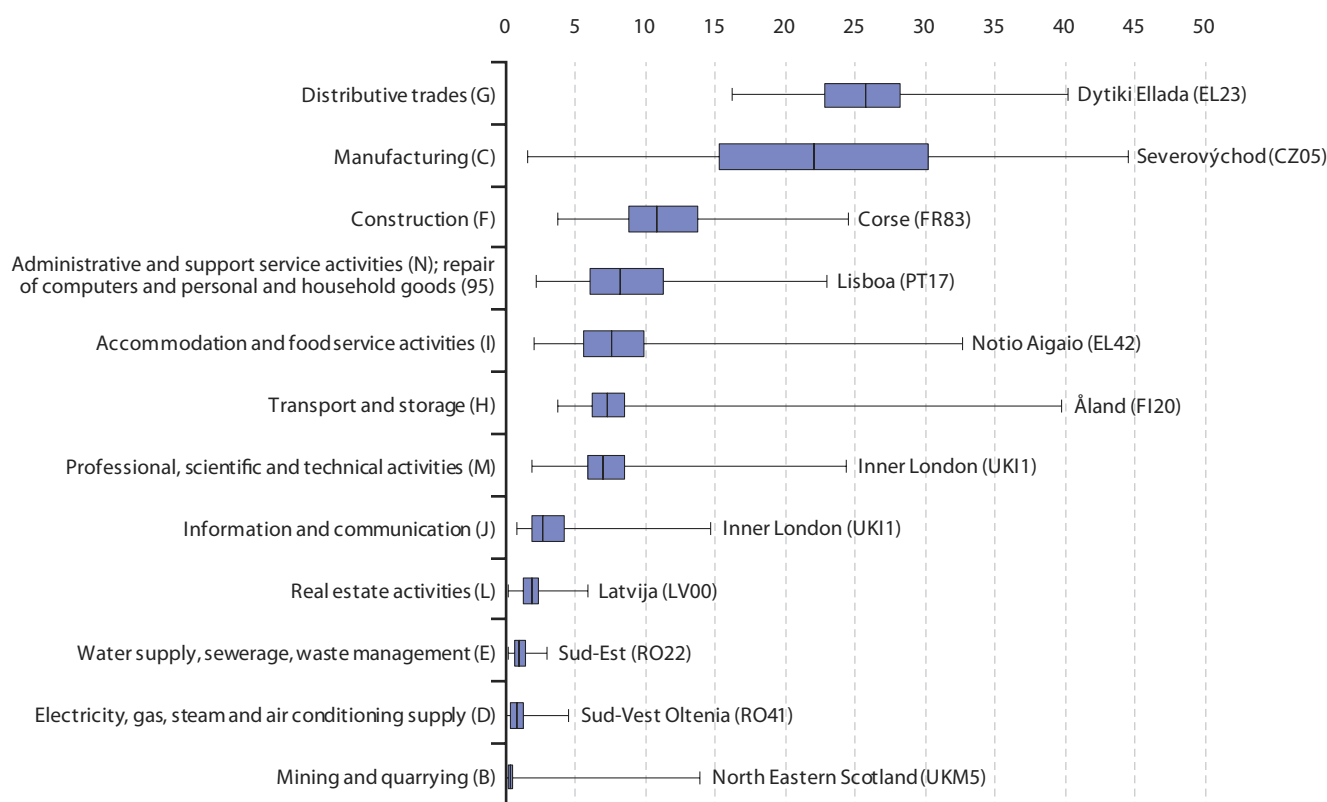
Business concentration

The analysis of specialisation (above) shows the relative importance of an individual activity in a particular region, regardless of the size of the region or the activity. Figure 6.2 shows the extent to which a particular activity is widely spread across most regions or is concentrated in a small number of regions. Four of the five mining and quarrying NACE divisions topped the ranking in 2010, with a very high share of employment concentrated in relatively few regions. The most concentrated activity was the mining of metal ores (NACE Division 07), where practically the entire EU workforce was concentrated across no more than 50 regions and where the top 10 regions accounted for 83.8 % of the sectoral workforce. Aside from the mining of metal ores, the top 10 regions accounted for more than half of the workforce for the mining of coal and lignite, the extraction of crude petroleum and natural gas, mining support service activities, air transport services and the manufacture of leather and leather products. In the case of air transport, the dominance of the top 10 regions was due to a concentration within large

metropolitan regions where main airports tend to be situated: chief among these were the regions that contained Paris, (Outer) London, Köln, Amsterdam and Madrid. Leather and leather products manufacturing, on the other hand, is a relatively small activity that was heavily concentrated in Italian, Portuguese and Romanian regions.

In contrast to the mining and quarrying of metallic and energy-producing minerals, the activity of other mining and quarrying (NACE Division 08) was among those where the cumulative share of the 10 largest regions was least dominant, as the top 10 regions accounted for just 17.7 % of sectoral employment. This relatively low share is due to the widespread availability and local sourcing of many construction materials, such as sand, clay and stone, which dominate this type of mining and quarrying activity. Of all the activities (NACE divisions), veterinary activities (NACE Division 75), motor trades and repair (NACE Division 45), retail trade (NACE Division 47), civil engineering (NACE Division 42) and the manufacture of food and beverages (NACE Divisions 10 and 11) had the lowest levels of concentration in 2010.

Figure 6.1 Regional specialisation by activity, by NUTS 2 regions, EU, 2010 ⁽¹⁾
(% share of regional non-financial business economy employment)

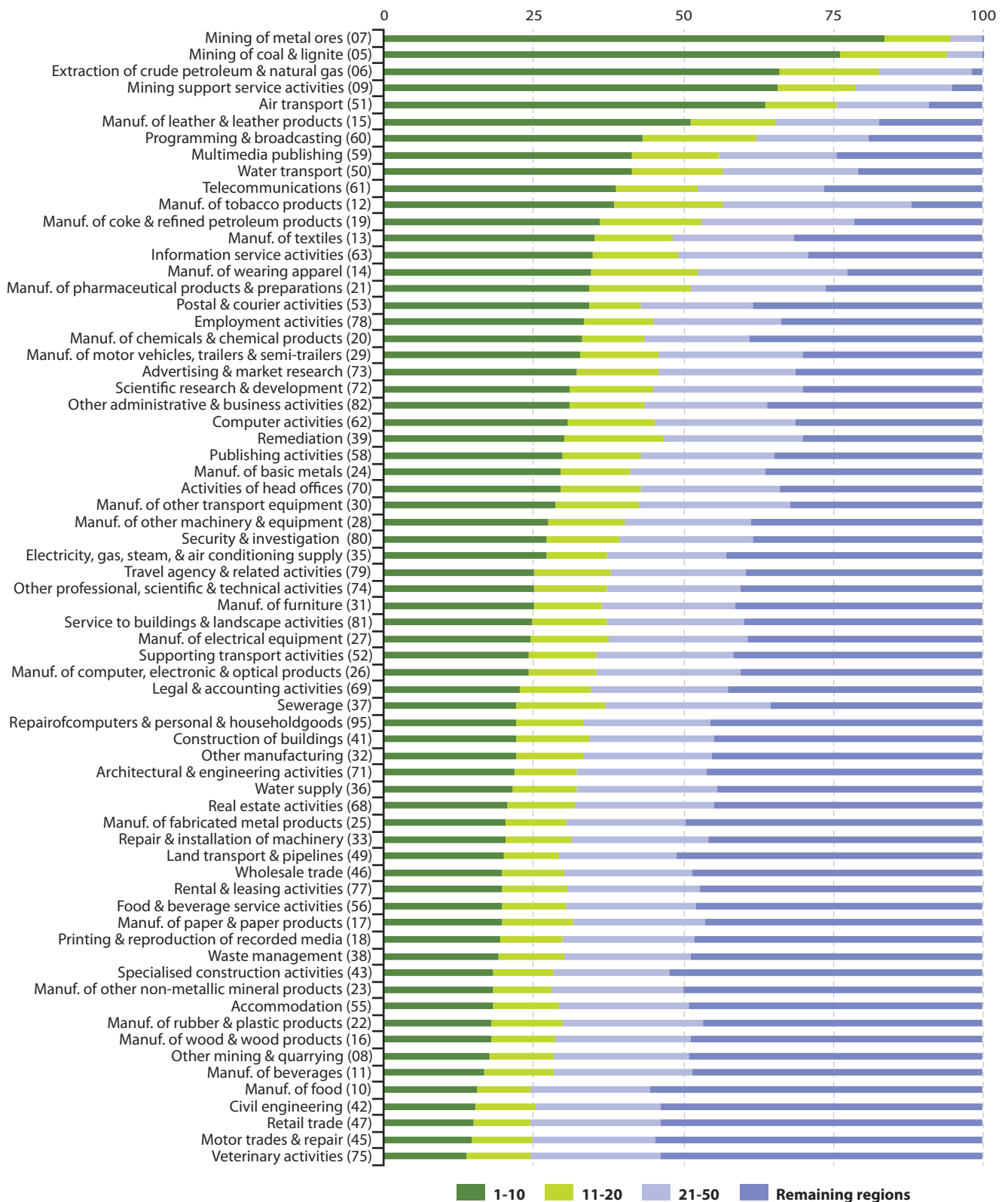


⁽¹⁾ Minimum and maximum share (vertical lines at the extremes); inter-quartile range (box); median share (vertical line within the box); Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Chemnitz (DED4), Leipzig (DED5), Emilia-Romagna (ITH5), Marche (ITI3), Helsinki-Uusimaa (FI1B), Malta, Etelä-Suomi (FI1C), Pohjois- ja Itä-Suomi (FI1D), Cheshire (UKD6) and Merseyside (UKD7), not available.

Source: Eurostat (online data code: [sbs_r_nuts06_r2](#))



Figure 6.2: Concentration of activities (NACE divisions), by NUTS 2 regions, EU, 2010 ⁽¹⁾
(%, cumulative share of top X regions in sectoral employment)



⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009; Chemnitz (DED4), Leipzig (DED5), Emilia-Romagna (ITH5), Marche (ITI3), Helsinki-Uusimaa (FI1B), Malta, Etelä-Suomi (FI1C), Pohjois- ja Itä-Suomi (FI1D), Cheshire (UKD6) and Merseyside (UKD7), not available.

Source: Eurostat (online data code: sbs_r_nuts06_r2)



Map 6.4 presents a different aspect of concentration, namely the extent to which a region is dependent on a small number of large activities, or, alternatively, whether it displays the characteristics of being more diversified. The map shows an indicator that is based on the cumulative share of the five largest activities (NACE divisions) in the total non-financial business economy workforce: the five largest activities are selected independently for each region, although there are several activities, such as retail trade, that are present among the five main employers in nearly all of the regions.

High levels of employment concentration tend to be recorded in those regions where construction, distributive trades or other services dominate the non-financial business economy, as the distribution of industrial activities tends to be more fragmented. The most concentrated regions were generally those traditionally associated with tourism, in particular specific regions in Greece, Spain, France, Italy and Portugal, underlining the importance of construction, trade, transport, and accommodation and food service activities in tourism-oriented regions. There were 44 regions at the NUTS level 2 that reported in excess of 47.5% of their non-financial employment concentrated in their five largest activities.

By contrast, the lowest concentrations were mainly recorded in regions with a relatively small services sector and a relatively large manufacturing activity; this was often the case in eastern Europe, in particular in the Czech Republic, Estonia, Hungary, Slovenia and Romania, but also in several regions in Germany, Italy, Finland and Sweden. The five largest activities accounted for around one third of non-financial business economy employment in three Czech regions (Moravskoslezsko, Severozápad and Jihozápad), the French capital city region of Île de France, the Hungarian region of Közép-Dunántúl and in Estonia (the latter is one region at NUTS level 2).

Data sources and availability

Regional SBS are collected under a regulation of the European Parliament and of the Council, using the definitions and analysis (breakdowns) specified in European Commission implementing regulations. The latest information available is generally for the reference year 2010, with regional statistics being presented for all of the EU Member States (except Malta) and for Norway; data are also presented at a national level for Switzerland and Croatia.

The regional SBS data presented in this chapter are restricted to the non-financial business economy, which includes NACE Sections B (mining and quarrying), C (manufacturing), D (electricity, gas, steam and air conditioning supply), E (water supply, sewerage and waste management), F (construction), G (distributive trades), H (transport and storage), I (accommodation and food service activities), J (information and

communication), L (real estate activities), M (professional, scientific and technical activities) and N (administrative and support service activities), as well as NACE Division 95 (repair of computers and personal and household goods). The aggregate for the non-financial business economy therefore excludes agricultural, forestry and fishing activities and public administration and other services (such as defence, education and health), which are not covered by SBS, and also excludes financial services (NACE Section K). Regional SBS are presented by sectors of activity, available at the NACE two-digit (division) level.

The type of statistical unit used for regional SBS data is normally the local unit, which is an enterprise or part of an enterprise situated in a geographically identified place. Local units are classified into sectors (by NACE) normally according to their own main activity, but in some EU Member States the activity code is assigned on the basis of the principal activity of the enterprise to which the local unit belongs. It is possible for the principal activity of a local unit to differ from that of the enterprise to which it belongs. Hence, national SBS data, based on the enterprise as a statistical unit, are not directly comparable with national aggregates compiled from regional SBS.

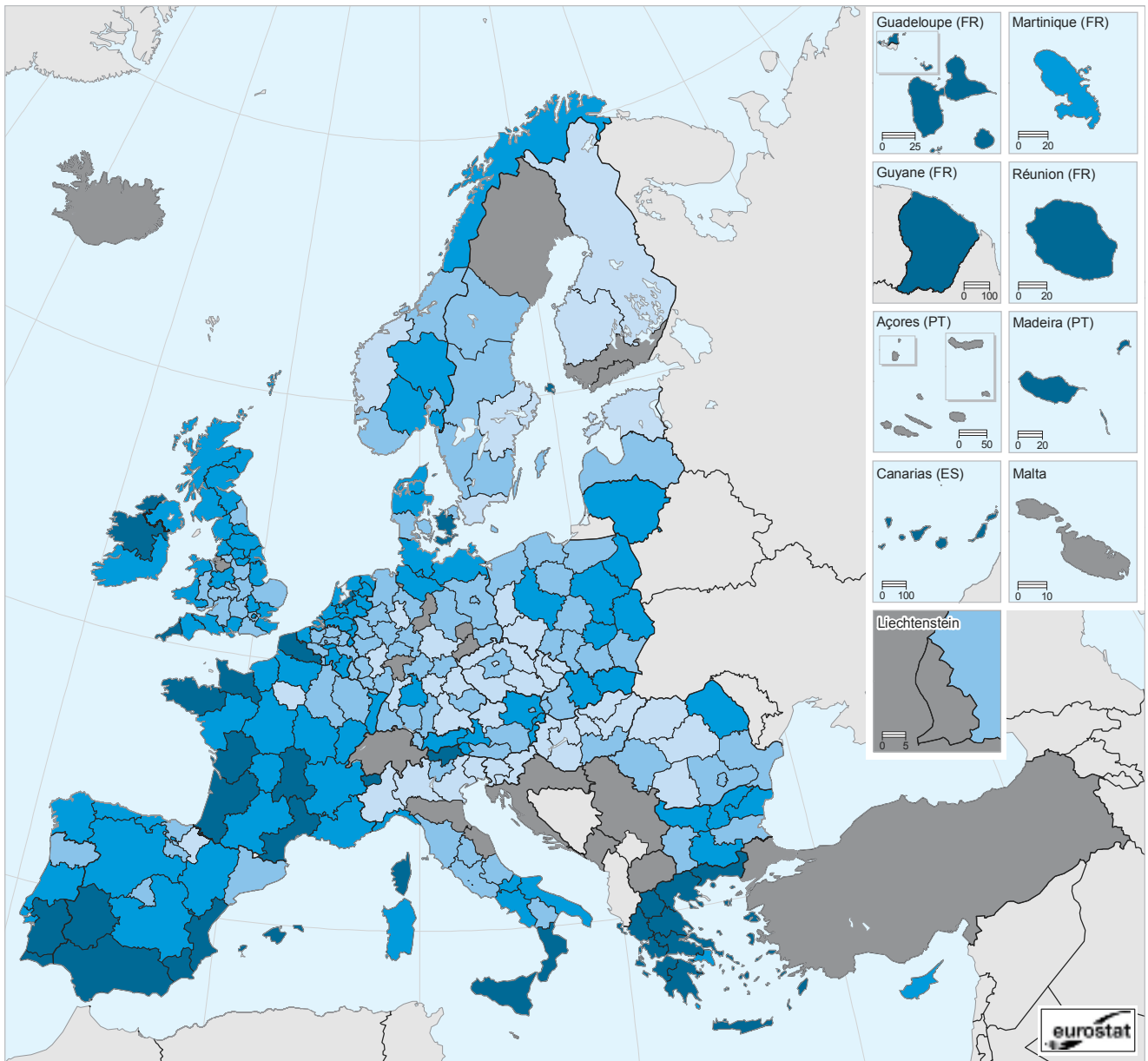
The main variable used for analysis in this chapter is the number of persons employed. For SBS, this is defined as the total number of persons who work (paid or unpaid) in the observation unit, as well as persons who work outside the unit but who belong to it and are paid by it. The number of persons employed includes working proprietors, unpaid family workers, part-time workers and seasonal workers.

Context

Regional SBS offer users who want to know more about the structure and development of the regional business economy a detailed, harmonised data source, describing for each activity the number of workplaces, number of persons employed, wage costs and investments made. This chapter shows how some of these data can be used to analyse different regional business characteristics, for example the focus, diversity and specialisation of regional business economies.

Supporting the creation and growth of businesses, in particular small and medium-sized enterprises (SMEs), is a key way by which cohesion policy helps to boost regional economies. SMEs often have difficulty in accessing finance and technology and coping with structural changes in markets. EU cohesion policy aims to tackle these difficulties through a combination of so-called 'hard' measures, such as direct support to investment, and 'soft' measures, notably the provision of business support services, training, fostering an innovative environment, access to finance and technology transfer, as well as the support of networks and clusters.

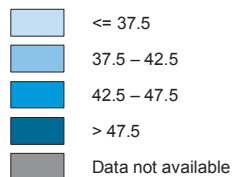
Map 6.4: Regional business concentration, by NUTS 2 regions, 2010 ⁽¹⁾
 (% cumulative share of the five largest activities (NACE divisions) in regional non-financial business economy employment)



(%, cumulative share of the five largest activities (NACE divisions) in regional non-financial business economy employment)

Administrative boundaries: © EuroGeographics © UN-FAO © Turkstat
 Cartography: Eurostat — GISCO, 05/2013

EU = 37.9



⁽¹⁾ Bulgaria (NACE Section F), Greece and the Netherlands, 2009.
 Source: Eurostat (online data code: sbs_r_nuts06_r2)