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**" In 2021, about half of the EU sales by the software publishing sector were generated from clients residing in other countries. "**

**" In 2021, the EU employment activities sector recorded the highest levels of sales (96.9%) generated from clients residing in the reporting economy. "**

*Globalisation patterns in EU trade and investment* is an online Eurostat publication presenting a summary of recent European Union (EU) statistics on economic aspects of globalisation, focusing on patterns of EU trade and investment. The business services sector can be viewed as providing key inputs in the production of other goods and services. As such, it makes an important contribution to the EU economy, promoting competitiveness and growth. The business services sector has expanded in recent years: this growth has been underpinned by the development of new services and more specialised tasks (including the management of supply chains and international production networks), but also reflects increased levels of outsourcing to external suppliers. These changes have provided a stimulus for the business services sector to become increasingly global in nature. Furthermore, technological changes have allowed smaller businesses to enter niche markets where previously they may have lacked the scale to trade internationally. This article provides an analysis of the turnover (sales) of EU enterprises in the business services sector, according to the residence of their clients — information is presented for residents in the reporting country and for non-resident customers from another countries. The analysis is based on non-confidential data, disseminated in the Eurostat database.

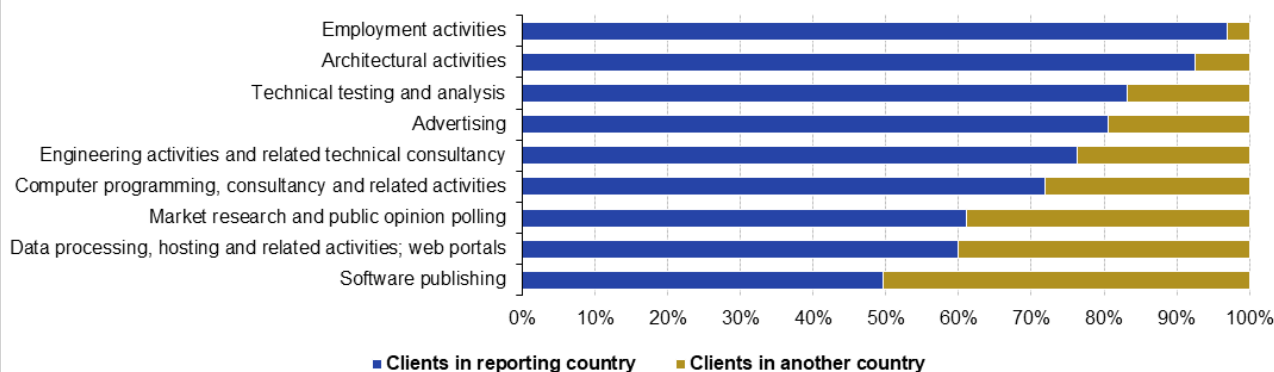
## Analysis of turnover for selected business services

**In 2021, about half of the EU sales by the software publishing sector were generated from non-resident clients residing in another country**

Figure 1 shows the proportion of business services turnover in 2021 by residence of the client. For each of the business services shown, a majority of the EU's turnover was realised by sales to clients from the reporting economy (in other words, clients residing in the domestic economy). This pattern was particularly evident for employment services, architectural activities, technical testing and analysis, and advertising, where more than 80 % of the sales were to customers in the reporting economy. Software publishing was the only sector for which clients resident in another country accounted for a higher share of total sales (50.4 %). Such disparities may be linked to the tradability of various services, the different modes for trading services, or barriers to entry which prevent/restrict trade in some business services.

In 2021, 96.9 % of the sales made by the EU's employment activities were to clients in the reporting country. By contrast, the percentage of total turnover accounted for by domestic clients fell to 49.6 % for software publishing activities.

**Analysis of turnover for selected business services, by residence of client, EU, 2021**  
(% of turnover)



Note: based on non-confidential, available data.  
Source: Eurostat (online data code: sbs\_part\_bscl)



**Figure 1: Analysis of turnover for selected business services, by residence of client, EU, 2021 (% of turnover)**  
Source: Eurostat (sbs\_part\_bscl)

### Ranking the turnover generated by selected business services

**In 2021, the EU computer programming services sector recorded the highest levels of sales generated from clients residing in another country.**

Looking in more detail at developments across the individual EU Member States, Table 1 shows a ranking of the turnover generated by selected business services, according to the residence of clients. In 2021, German computer programming and consultancy enterprises recorded the highest value of business services sales to clients residing in another country (EUR 35.9 billion). The same activity — computer programming and consultancy — also accounted for the second, third, and fourth highest value of sales, as made by Swedish, Dutch and French enterprises.

While the rankings of overall turnover are unsurprisingly dominated by some of the largest EU Member States, the second half of Table 1 presents the percentage of the national sector’s turnover that was generated by clients from other EU Member States. In 2021, 90.4 % of the Czech sales in software publishing were derived from clients residing in another country. The next highest shares were recorded for software publishing in Belgium with 88.0 % and Malta (87.7 %).

## Top ten rankings of turnover for selected business services, by residence of client, 2021

(million euros, %)

Value of turnover for clients resident in another country (million euros)		
Germany	Computer programming, consultancy and related activities	35 859
Sweden	Computer programming, consultancy and related activities	18 680
Netherlands	Computer programming, consultancy and related activities	11 634
France	Computer programming, consultancy and related activities	9 549
Germany	Engineering activities and related technical consultancy	8 273
Spain	Computer programming, consultancy and related activities	7 269
France	Engineering activities and related technical consultancy	7 140
Sweden	Data processing, hosting and related activities; web portals	6 616
Poland	Computer programming, consultancy and related activities	6 424
Netherlands	Data processing, hosting and related activities; web portals	5 330
Share of turnover for clients resident in another country (%)		
Czechia	Software publishing	90.4
Belgium	Software publishing	88.0
Malta	Software publishing	87.7
Sweden	Data processing, hosting and related activities; web portals	80.4
Latvia	Data processing, hosting and related activities; web portals	80.3
Lithuania	Market research and public opinion polling	79.0
Estonia	Computer programming, consultancy and related activities	77.8
Malta	Technical testing and analysis	76.5
Sweden	Software publishing	75.9
Lithuania	Data processing, hosting and related activities; web portals	75.6

Note: top ten rankings based on non-confidential, available data.

Source: Eurostat (online data code: sbs\_part\_bscl)

eurostat 

**Table 1: Top ten rankings of turnover for selected business services, by residence of client, 2021** Source: Eurostat (sbs\_part\_bscl)

### Source data for tables and graphs

- [Business services-2021](#)

### Other articles

- [Globalisation patterns in EU trade and investment](#)

### Database

- [Business services statistics](#)

### Dedicated section

- [Structural business statistics](#)
- [Globalisation of businesses](#)

### Methodology

- [Business services statistics](#) (ESMS metadata file — bs\_esms)

## Legislation

- [European Commission — reflection paper on harnessing globalisation \(COM\(2017\) 240\)](#)