

Computer Services

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- Software consultancy and supply services are overwhelmingly the most important economic activity in computer services.
- In several Member States there is a link between employment size class and product specialisation in software consultancy and supply services. The smaller the enterprise, the greater the product specialisation.
- Enterprises are by far the biggest client group for computer services, with more than 80% of clients. The public sector is the second biggest group with under 20%. Only in France is the share of households non-negligible.
- Resident enterprises form the clear majority of computer services clientele. Only in Luxembourg is the share of non-resident clients somewhat higher: 42%. The size of the enterprise makes no real difference to market access; small enterprises can also access non-resident clients.

Introduction

In mid-1999 Eurostat with the support of DG Enterprise began a project to improve the statistical coverage of business services. After the initial methodological development and testing period, participating Member States launched a survey on computer services for the reference year 2000.

This report presents results from the first survey in eight Member States (Denmark, Spain, France, Luxembourg, Portugal, Finland, Sweden and the United Kingdom) which have provided data to Eurostat. It concentrates on turnover data, broken down by client and product. The data analysed in this report are at this stage provisional: no absolute figures are presented.

Data are derived from sample surveys. In some cases response rates could be relatively low, therefore care should be taken when interpreting the detailed data.

More comprehensive analysis on computer services turnover, personnel costs, number of persons employed and value added will be carried out later this year as data on additional variables and countries (Ireland and Italy) become available.

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – /2002

Contents

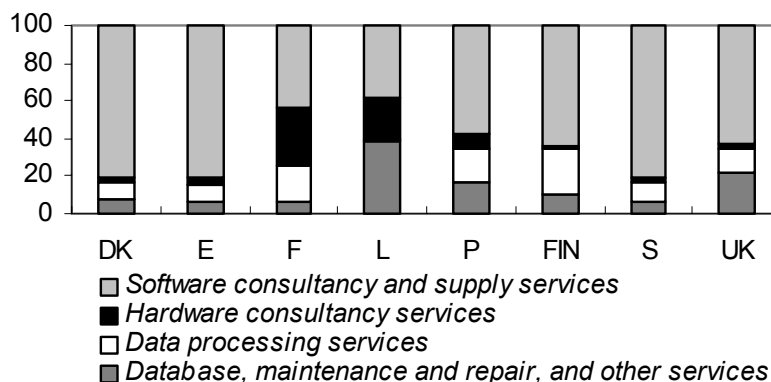
Introduction	1
Turnover shares of different economic activities	2
Turnover share of computer services products in total turnover	2
Consistency of computer services statistics	2
Product specialisation	3
Product specialisation and employment size class	3
Type of client	4
Type of client and economic activity	4
Type of client and employment size class	4
Residence of clients	5
Client specialisation	6



Turnover shares of different economic activities

Software consultancy and supply services (economic activity 72.2) are overwhelmingly the most important economic activity in computer services (division 72) for all reporting Member States. The turnover shares of hardware consultancy (72.1), data processing (72.3), database services (72.4), maintenance and repair services (72.5) and other computer related services (72.6) are often quite small. Some of the analysis in this report consequently focuses on software consultancy and supply services.

Figure 1: Turnover shares of different economic activities within computer services (%), 2000

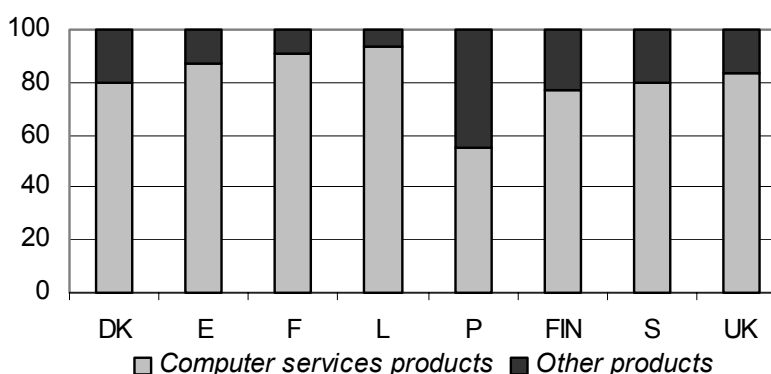


France and Sweden: 1999

Turnover share of computer services products in total turnover

Computer services products – products P1-P3 defined in the methodological note – generate more than 70% of total computer services turnover in all reporting Member States except in Portugal, where the share is relatively low at 55%. This can be explained by the fact that resale of software and hardware products - P7a and P7b - generate a significant share (28%) of total computer services turnover in Portugal. The high share of computer services products in total turnover indicates that the product classification/definition in general is appropriate for Division 72 (computer services) of the classification of economic activities (NACE Rev.1).

Figure 2: Computer services products' turnover share in the total turnover of computer services (%), 2000



France and Sweden: 1999

Consistency of computer services statistics

The combinations of main product and economic activity are considered to be consistent if the main product generates the biggest share of the turnover in each economic activity. These consistent combinations are defined in the methodological note. While above we calculated each economic activity's turnover from any computer services product, here only the turnover from the main

Table 1: Consistency between economic activity and main product in computer services, 2000

	721	722	723	724	725
P1	E, F				
P2a, P2b, P2c & P3c	DK, E, F, L, P, FIN, S, UK				
P3a			DK, E, F, P		
P3b				DK, P, S, UK	
P3d					DK, E, F, P, FIN, S, UK

France and Sweden: 1999

product counts. There is a strong product/economic activity consistency for software consultancy and supply services for all reporting countries. For maintenance and repair services the main product and economic activity are consistent in all reporting

countries except Luxembourg. On the other hand, hardware consultancy services and their main product are consistent only in Spain and France. Whenever there is an inconsistency in the statistics between the main product and economic activity (e.g. P1 and 72.1),

therefore one has to be cautious when interpreting data at economic activity level. Such a lack of consistency between the main product and corresponding economic activity could reflect misclassifications in the national business registers.

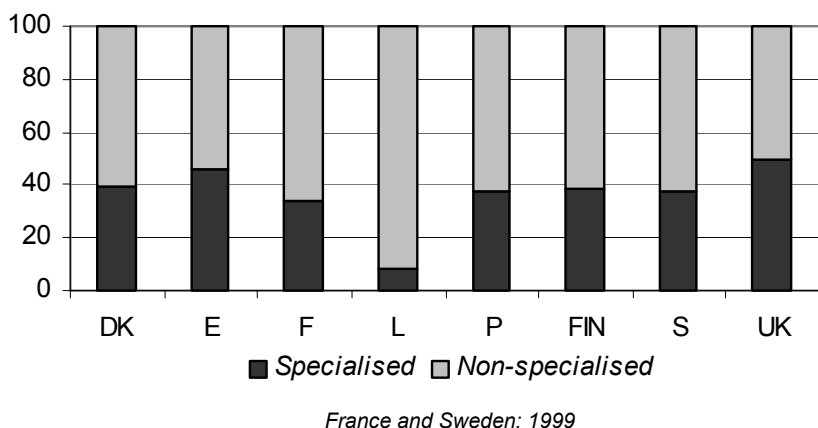
Product specialisation

Product specialisation in computer services can be analysed from two perspectives at least. From the economic point of view the question is how dependent each economic activity is on its main product or how

large or small is the product variation/concentration, and consequently how dependent enterprises are on the market evolution of each product. From the classification point of view, the

question is the appropriateness of the current product and economic activity classifications i.e., whether the current main product is still the main product for each economic activity.

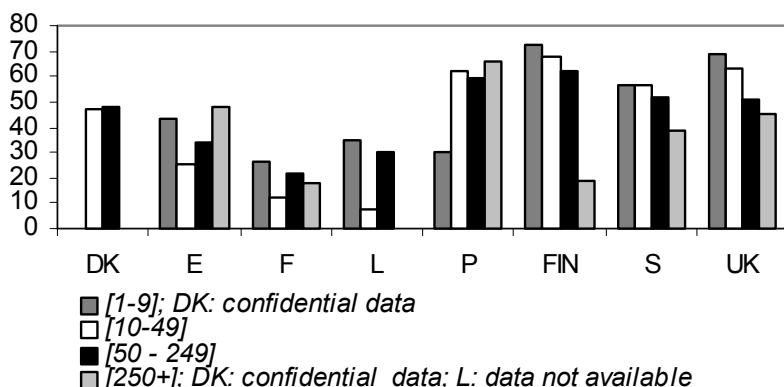
Figure 3: Turnover shares of product specialised enterprises in computer services (%), 2000



For the purpose of this study computer services enterprises have been defined as product-specialised if more than 75% of their turnover comes from the main product of the respective economic activity group. The turnover share of product-specialised enterprises varies between 35% in France and 49% in the United Kingdom. In Luxembourg this share is only 8%. In all reporting Member States the turnover shares of enterprises which are not product-specialised are greater than of those which are product-specialised. On the basis of this analysis of turnover figures, we can thus say that computer services are not product-specialised.

Product specialisation and employment size class

Figure 4: Turnover shares of product specialised enterprises by size class in software consultancy and supply services (%), 2000



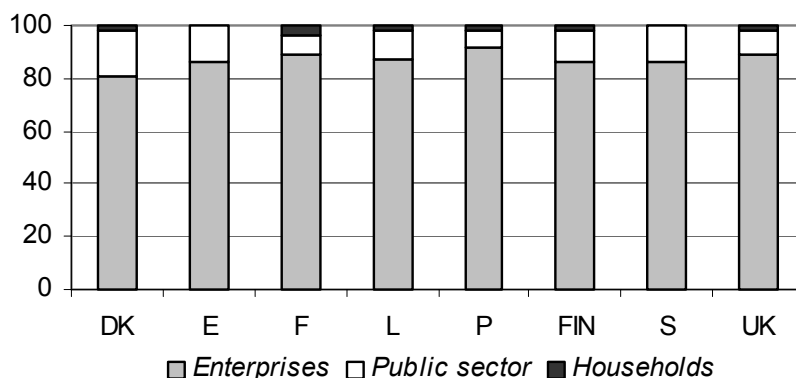
Data are available for product specialisation by employment size classes for economic activity 72.2, i.e. software consultancy and supply services.

As might be expected, there is a link between employment size class and product specialisation in software consultancy and supply services in the reporting Member States. The smaller the enterprise, the greater the product specialisation. Except in Spain and Portugal, micro enterprises (1-9 persons employed) are the most product-specialised of the four employment size classes. Smaller enterprises with fewer resources concentrate on a narrower product range.

Type of client

Data on type of client can be analysed to understand who are the computer services' clients and how important they are in terms of turnover. Since we are analysing business services it is hardly surprising that enterprises form the biggest of the three client types, with more than 80% of clients. The public sector is the second biggest with under 20%. Only in France is the share of households non-negligible: 4%.

Figure 5: Turnover by type of client in computer services (%), 2000



France and Sweden: 1999

Type of client and economic activity

Enterprises are by far the most important group of clients for all economic activities in all reporting countries. The share of enterprise clients is never less than 60%. The public sector is an important client (share > 15%) for hardware consultancy services in Denmark, Spain, Luxembourg and Portugal. In addition, the public sector's share as

a client is above 15% for software consultancy and supply services in Denmark and for data processing services in Luxembourg, Finland and Sweden. The public sector is an important client for database services in Denmark. Finally, the public sector's share as a client is above 15% for maintenance and repair services in Sweden and for

other computer related services in Portugal and the United Kingdom. Households' share as a client exceeds 15% only in database services in Denmark and Finland. The share of household clients in database services is probably influenced by national differences through the emergence of Internet service providers in this activity.

Table 2: Turnover share of enterprise clients by economic activity (%), 2000

	DK	E	F	L	P	FIN	S	UK
72	81	86	89	87	91	86	86	89
721	82	71	89	79	82	C	85	88
722	79	86	88	87	93	92	88	91
723	87	92	94	84	95	75	75	97
724	61		81	95	93	69	92	97
725	78	87	85	100	88	C	72	91
726	98		:	91	81	C	88	77

Table 3: Turnover share of public sector clients by economic activity (%), 2000

	DK	E	F	L	P	FIN	S	UK
72	17	14	7	11	7	12	14	9
721	17	27	7	18	16	C	13	C
722	19	14	9	13	6	8	12	8
723	13	8	3	16	3	25	25	C
724	21		7	0	7	9	8	C
725	9	11	11	0	3	C	27	5
726	2		:	6	15	C	11	19

Table 4: Turnover share of household clients by economic activity (%), 2000

	DK	E	F	L	P	FIN	S	UK
72	2	0	4	2	2	2	0	2
721	1	2	4	3	2	C	2	C
722	2	0	3	0	1	0	0	1
723	0	0	3	0	2	0	0	C
724	18		12	5	0	22	0	C
725	13	2	4	0	9	C	1	4
726	0		:	3	4	C	1	4

France and Sweden: 1999; Spain: 72.3 = 72.3 + 72.4 and 72.5 = 72.5 + 72.6

Type of client and employment size class

No clear relationship can be identified when data on type of client and employment size class are crossed. However, it may be observed from Table 6 that the public-sector client share increases

with the enterprise size in Denmark, France and Luxembourg. On the other hand, in France, Luxembourg, Portugal and Sweden, households' client share decreases as the enterprise size increases (Table 7).

Table 5: Turnover share of enterprise clients by size class in computer services (%), 2000

	DK	E	F	L	P	FIN	S	UK
Total	81	86	89	87	91	86	86	89
1-9	89	79	89	90	91	89	81	89
10-49	83	90	88	91	87	91	86	87
50-249	79	83	88	64	90	86	90	93
250+	70	87	91	:	99	83	86	88

Table 6: Turnover share of the public sector clients by size class in computer services (%), 2000

	DK	E	F	L	P	FIN	S	UK
Total	17	14	7	11	7	12	14	9
1-9	9	20	5	7	3	9	17	8
10-49	15	10	7	9	11	9	14	10
50-249	17	16	8	36	10	9	10	5
250+	29	13	8	:	1	17	14	12

Table 7: Turnover share of household clients by size class in computer services (%), 2000

	DK	E	F	L	P	FIN	S	UK
Total	2	0	4	2	2	2	0	2
1-9	2	1	6	3	6	2	2	3
10-49	2	0	5	0	2	0	0	3
50-249	4	1	4	0	0	5	0	2
250+	1	0	1	:	0	0	0	0

France and Sweden: 1999

Residence of clients

Data on residence of client, in addition to providing a very rough estimate of the location of clients, can be compared with any data on exports of services available from other sources, thus providing an additional source and check on data that are relatively difficult to obtain. Concerning the residence of client enterprises, resident enterprises form the clear majority of computer services clientele. Only in Luxembourg is the share of non-resident clients somewhat higher: 42%. Elsewhere the share is between 4% and 15%. Probably because of the small domestic markets and close proximity of neighbouring countries, non-residents form a significant share of clientele in Luxembourg.

Residence of client and economic activity

As can be seen from Table 8, the biggest economic activity in computer services - software consultancy and supply services - has the highest share of non-resident clients among all computer services in France, Finland, Sweden and the United Kingdom. Hardware consultancy services have the lowest share of non-resident clients in Spain, France and Sweden.

Table 8: Turnover share of non-resident clients by economic activity (%), 2000

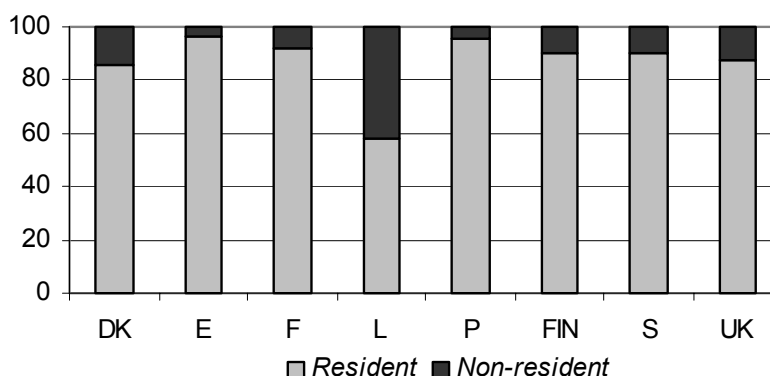
	DK	E	F	L	P	FIN	S	UK
72	15	4	8	42	5	10	10	12
721	14	2	5	13	2	C	1	6
722	12	4	11	27	6	13	11	16
723	10	7	6	5	3	2	6	6
724	8		5	45	14	11	2	8
725	2	3	5	20	2	C	6	2
726	64		:	81	7	C	8	7

France and Sweden: 1999; Spain: 72.3 = 72.3 + 72.4 and 72.5 = 72.5 + 72.6

Residence of client and employment size class

Perhaps despite what might have been expected, there is no identifiable link between the residence of clients and employment size classes in the participating Member States. One conclusion might be that the size of the

Figure 6: Turnover share of resident clients in computer services (%), 2000



France and Sweden: 1999

enterprise makes no real difference to market access: small enterprises can access non-resident clients as well. Although one might have expected to find mainly big enterprises as exporters, only in Sweden does the size class of large enterprises [250+] have the biggest share of non-resident clients. Data do not support the idea of finding mainly largest enterprises with the most non-resident clients.

Table 9: Turnover share of non-resident clients by size class in computer services (%), 2000

	DK	E	F	L	P	FIN	S	UK
Total	15	4	8	42	5	10	10	12
1-9	8	5	10	58	4	7	3	4
10-49	16	5	6	24	6	13	9	16
50-249	20	6	8	10	6	14	12	26
250+	18	2	7	:	2	7	12	12

France and Sweden: 1999

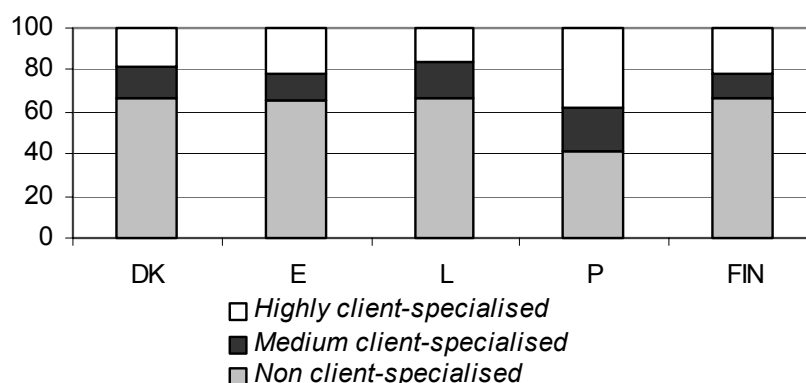
Client specialisation

There is one easily identifiable dimension to analysis of the information on client specialisation in computer services: the economic dimension. From the economic point of view, the question is how many clients an enterprise has and consequently how dependent it is on those clients' market evolution.

For the purpose of this study an enterprise's client specialisation has been defined according to the share of turnover occupied by its three biggest clients. If it is less than 50%, the enterprise is reckoned to be non client-specialised. Enterprises are medium specialised if the three biggest clients' share of turnover is between 50% and 75%; above 75% they are highly specialised.

As can be seen from Figure 7, the turnover share of non client-specialised enterprises is around or

Figure 7: Turnover by client specialisation in computer services (%), 2000



above 60% in Denmark, Spain, Luxembourg and Finland. Only in Portugal does the turnover share of highly client-specialised enterprises exceed 35%. Elsewhere, it is around 20%. For computer services enterprises in the reporting Member

States, in terms of turnover non client-specialisation seems to be the norm.

Client specialisation and employment size class

Combining the information on client specialisation with that on employment size classes does not disclose any size effect (Table 10). However, it can be observed that in Denmark, Spain, Luxembourg and Finland, non client-specialised enterprises consistently take the biggest turnover shares in all size classes. In Portugal the turnover shares of highly client-specialised enterprises are biggest in two of the four size classes.

Table 10: Turnover shares of enterprises with different client specialisation by size class in computer services (%), 2000

	DK				E			
	1-9	10-49	50-249	250+	1-9	10-49	50-249	250+
Non client-specialised	56	68	79	67	45	57	51	79
Medium client-specialised	21	20	10	10	13	20	20	8
Highly client-specialised	23	12	11	23	42	23	29	13
	L				P			
	1-9	10-49	50-249	250+	1-9	10-49	50-249	250+
Non client-specialised	71	60	59	:	35	58	44	23
Medium client-specialised	14	25	16	:	23	18	17	28
Highly client-specialised	15	15	25	:	42	24	39	49
	FIN							
	1-9	10-49	50-249	250+				
Non client-specialised	50	37	62	89				
Medium client-specialised	17	36	9	1				
Highly client-specialised	33	27	29	10				

Client and product specialisation

Crossing the information on client and product specialisation (Table 11) shows that in Denmark, Spain and Luxembourg client specialisation and product specialisation are linked. Product specialised enterprises are more likely to be client-specialised (in terms of turnover) than enterprises not specialised in products. In Portugal, on the other hand, there is an inverse link between client and product specialisation.

Table 11: Client and product specialisation in computer services (%), 2000

	DK		E	
	Product non-specialised	Product specialised	Product non-specialised	Product specialised
Non client-specialised	69	61	68	63
Medium client-specialised	15	16	11	15
Highly client-specialised	16	23	21	22
	L		P	
	Product non-specialised	Product specialised	Product non-specialised	Product specialised
Non client-specialised	71	20	38	45
Medium client-specialised	14	56	22	20
Highly client-specialised	15	24	40	35

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Economic Activities

Economic activities in computer services are classified using the common basis for statistical classification of economic activities within the EU: NACE Rev.1. The third level of NACE Rev.1 consists of headings identified by a three digit numerical code. Three-digit codes are called groups. Computer services, a two-digit code also called a division (72), consists of the following economic activities:

NACE group:

- 72.1: Hardware consultancy services
- 72.2: Software consultancy and supply services
- 72.3: Data processing services
- 72.4: Database services
- 72.5: Maintenance and repair services
- 72.6: Other computer related services

Products

The product classification of computer services used in this study follows (with certain adaptations inspired by the Central Product Classification (CPC)) the common basis for the classification of products by activity within the EU: CPA. Products in the computer services are classified as follows:

- P1: Hardware consultancy services
- P2: Software supply
- P2a: packaged software
- P2b: customised software
- P2c: computer consultancy services
- P3: Other computer services
- P3a: computer facilities management and data processing
- P3b: database services
- P3c: systems maintenance services
- P3d: computer hardware servicing, repair and maintenance of computing machinery and equipment
- P4: Network and telecommunication services
- P5: IT-related training
- P6: Leasing or rental services of computing machinery without operator
- P7: Resale
- P7a: software (not own developed)
- P7b: hardware and equipment
- P7c: other
- P8: Others

Product consistency

Each economic activity in computer services has its main product. The consistent combinations of economic activity and main product are defined as follows:

- NACE group 72.1: P1
- NACE group 72.2: P2a, P2b, P2c & P3c
- NACE group 72.3: P3a
- NACE group 72.4: P3b
- NACE group 72.5: P3d

Product specialisation

An enterprise has been considered product specialised, if its most important product:

- a) is consistent with the main activity of the enterprise and
- b) comprises at least 75% of its total net turnover

Client specialisation

Client specialisation is defined as a share of the three biggest clients in total turnover:

- Non-specialised: [0% - 50%]
- Medium specialised: [50% - 75%]
- Highly specialised: [75% - 100%]

Employment size-classes

The classification of enterprises into employment size classes is based on the number of persons employed. Computer services enterprises are classified into the following four size classes:

- [1 – 9] micro
- [10 – 49] small
- [50 – 249] medium
- [250 - +] large

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

Symbols

- 0 Less than half the final digit shown
- : Data not available
- C Confidential data

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