

ENTERPRISES IN CENTRAL AND EASTERN EUROPE



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Y. Franchet
Generaldirektor

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To ensure that the vast quantity of accessible data is made widely available, and to help each user make proper use of this information, Eurostat has set up two main categories of document: statistical documents and publications.

The statistical document is aimed at specialists and provides the most complete sets of data: reference data where the methodology is well-established, standardized, uniform and scientific. These data are presented in great detail. The statistical document is intended for experts who are capable of using their own means to seek out what they require. The information is provided on paper and/or on diskette, magnetic tape, CD-ROM. The white cover sheet bears a stylized motif which distinguishes the statistical document from other publications.

The publications proper tend to be compiled for a well-defined and targeted public, such as educational circles or political and administrative decision-makers. The information in these documents is selected, sorted and annotated to suit the target public. In this instance, therefore, Eurostat works in an advisory capacity.

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To help the user focus his research, Eurostat has created 'themes', i.e. subject classifications. The statistical documents and publications are listed by series: e.g. yearbooks, short-term trends or methodology in order to facilitate access to the statistical data.

Y. Franchet
Director-General

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Eurostat a pour mission, à travers le système statistique européen, de répondre aux besoins de la Commission et de l'ensemble des personnes impliquées dans le développement du marché unique.

Pour mettre à la disposition de tous l'importante quantité de données accessibles et faire en sorte que chacun puisse s'orienter correctement dans cet ensemble, deux grandes catégories de documents ont été créées: les documents statistiques et les publications.

Le document statistique s'adresse aux spécialistes. Il fournit les données les plus complètes: données de référence où la méthodologie est bien connue, standardisée, normalisée et scientifique. Ces données sont présentées à un niveau très détaillé. Le document statistique est destiné aux experts capables de rechercher, par leurs propres moyens, les données requises. Les informations sont alors disponibles sur papier et/ou sur disquette, bande magnétique, CD-ROM. La couverture blanche ornée d'un graphisme stylisé démarque le document statistique des autres publications.

Les publications proprement dites peuvent, elles, être réalisées pour un public bien déterminé, ciblé, par exemple l'enseignement ou les décideurs politiques ou administratifs. Des informations sélectionnées, triées et commentées en fonction de ce public lui sont apportées. Eurostat joue, dès lors, le rôle de conseiller.

Dans le cas d'un public plus large, moins défini, Eurostat procure des éléments nécessaires à une première analyse, les annuaires et les périodiques, dans lesquels figurent les renseignements adéquats pour approfondir l'étude. Ces publications sont présentées sur papier ou dans des banques de données de type vidéotex.

Pour aider l'utilisateur à s'orienter dans ses recherches, Eurostat a créé les thèmes, c'est-à-dire une classification par sujet. Les documents statistiques et les publications sont répertoriés par série — par exemple, annuaire, conjoncture, méthodologie — afin de faciliter l'accès aux informations statistiques.

Y. Franchet
Directeur général

ENTERPRISES IN CENTRAL AND EASTERN EUROPE

Theme
Energy and industry
Series
Studies and research

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Cataloguing data can be found at the end of this publication

A great deal of additional information on the European Union is available on the Internet.
It can be accessed through the Europa server (<http://europa.eu.int>)

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3.4 MILLION ENTERPRISES IN CENTRAL AND EASTERN EUROPE

Six years after the fall of the Berlin Wall, new production structures are gradually becoming established in the central and eastern European countries (CEECs). Many enterprises are created every year. In September 1995, 3 362 000 enterprises¹ were carrying out activities in accordance with the laws of the market in the eleven recipient countries² under the European Union's PHARE programme. The general structure of the population surveyed is fairly close to that of the Member States of the European Union.

These are the first results from the panel on newly-created enterprises set up by the statistical offices of the eleven CEECs with help from Eurostat and funding from the PHARE programme.

1. THE POPULATION OF ENTERPRISES IN CENTRAL AND EASTERN EUROPE

1.1. Estimates with a margin of error

The estimated number of non agricultural enterprises is the result of a sample check of the number of enterprises recorded in the national registers and obviously contains a margin of error. The margin for each country is shown in the table below and should be interpreted as follows: the estimated number of enterprises plus or minus the margin of error contains the real value to be estimated (with 0.95 probability). This degree of precision limits the level of detail for which the estimates remain relevant, and thus restricts the level of detail of the results published. The precision shown below is based on the assumption of completeness of the national registers.

Table 1 : Precision of the estimates by country

	Albania	Bulgaria	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia	Slovenia	Total CEEC
Number of enterprises	41 460	302 665	706 495	30 397	519 502	25 663	57 078	1 057 102	362 662	186 710	72387	3 362 121
Precision	2.6%	1.8%	1.9%	2.2%	1.5%	3.6%	2.7%	3.2%	2.1%	1.9%	0.7%	1.2%



Source: Eurostat PECO

¹ This estimate does not include the agricultural sector.

² Albania, Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia.

The SOURCES of information

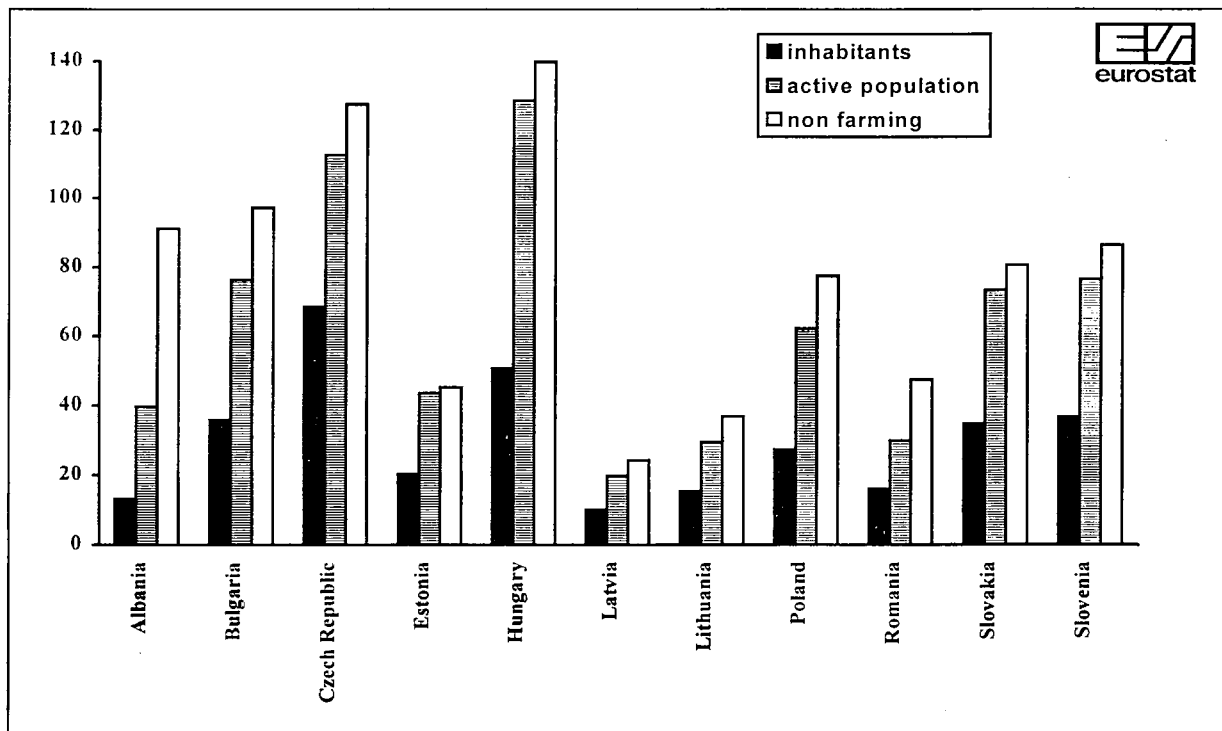
The rapid publication of these initial results is based on two sources of information. The data on the structure of the enterprises come mainly from the statistics on units recorded in the business registers administered by the statistical offices of the eleven participant countries. These data are corrected in accordance with the results of the first survey carried out by the statistical offices as part of the project for a panel of newly-created enterprises. This survey is also the sole source of information on persons setting up enterprises, and the origin, profile and development of enterprises.

The panel was made up of a sample of 92 000 recorded enterprises established before 1 January 1995. The first survey was carried out in September/October 1995 by the national statistical offices using a common questionnaire and a strictly comparable methodology.

1.2. Density lower than in the European Union

The data in absolute values on the number of enterprises by country do not in themselves make it possible to draw any really useful comparisons. This is the reason why Figure 1 presents the number of enterprises in proportion to the population (number of inhabitants) as well as to the active population and non-farming active population.


Figure 1 : Enterprises per 1000 persons



Source: Eurostat PECO

The average density of enterprises in the CEECs, i.e. 31 enterprises per 1 000 inhabitants, is lower than in the European Union.

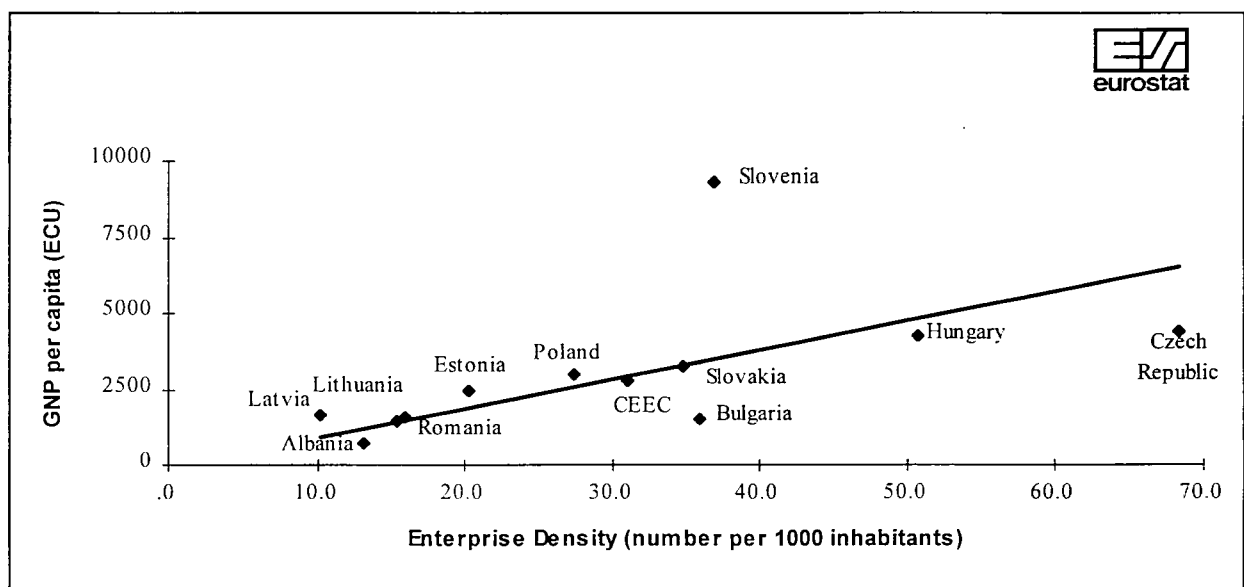
Table 2 : Density of enterprises in CEEC and in the EU

		
Number of enterprises per 1000	CEEC	EU
Inhabitants	31,0	42,8
Active population	64,9	95,0
Non farming active population	83,0	112,6

Source: Eurostat PECO

This density varies considerably depending on the country. It is above the EU average in the Czech Republic and Hungary, but is low in the Baltic countries and the Balkan states, with the exception of Bulgaria, where the situation is very close to that in the other central European countries. As Figure 2 shows, it is linked to gross national product per capita.

Figure 2 : Enterprise density and GNP per capita



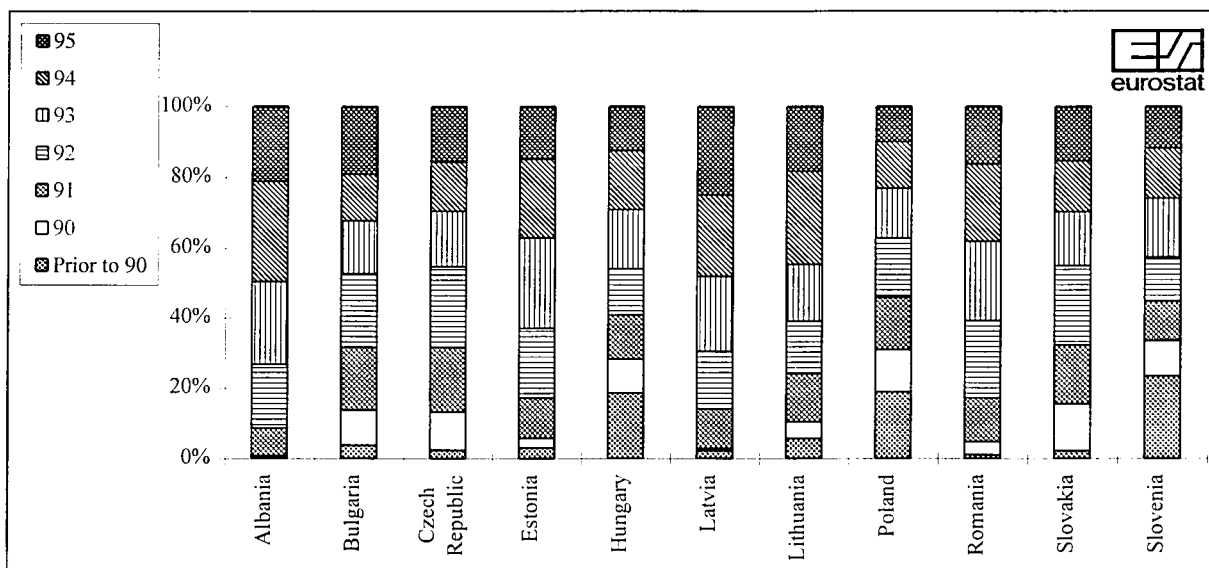
Source: Eurostat PECO

2. THE PROFILE OF THE ENTERPRISES

2.1. Large majority of enterprises created during transition

The speed with which the process of economic transition has actually progressed in the countries varies. Some countries such as Hungary, Slovenia and, to a certain extent, Poland had already begun their transition before the Berlin Wall came down.

Figure 3 : Distribution of enterprises by year of creation

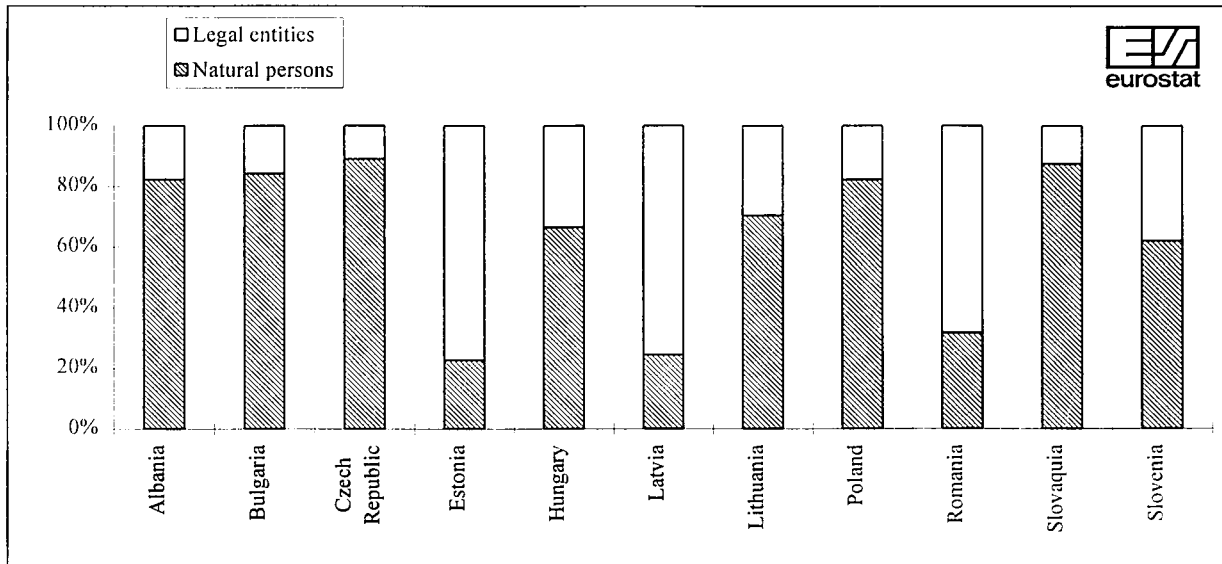


Source: Eurostat PECO

2.2. Many sole proprietorships

Figure 4 illustrates the distribution of enterprises into companies (legal entities) and natural persons. It shows that in some countries (mainly Latvia, Estonia and Romania) there is a lower proportion of sole proprietorships. Perhaps specific registration conditions have caused this.

Figure 4 : Distribution of enterprises by type of unit

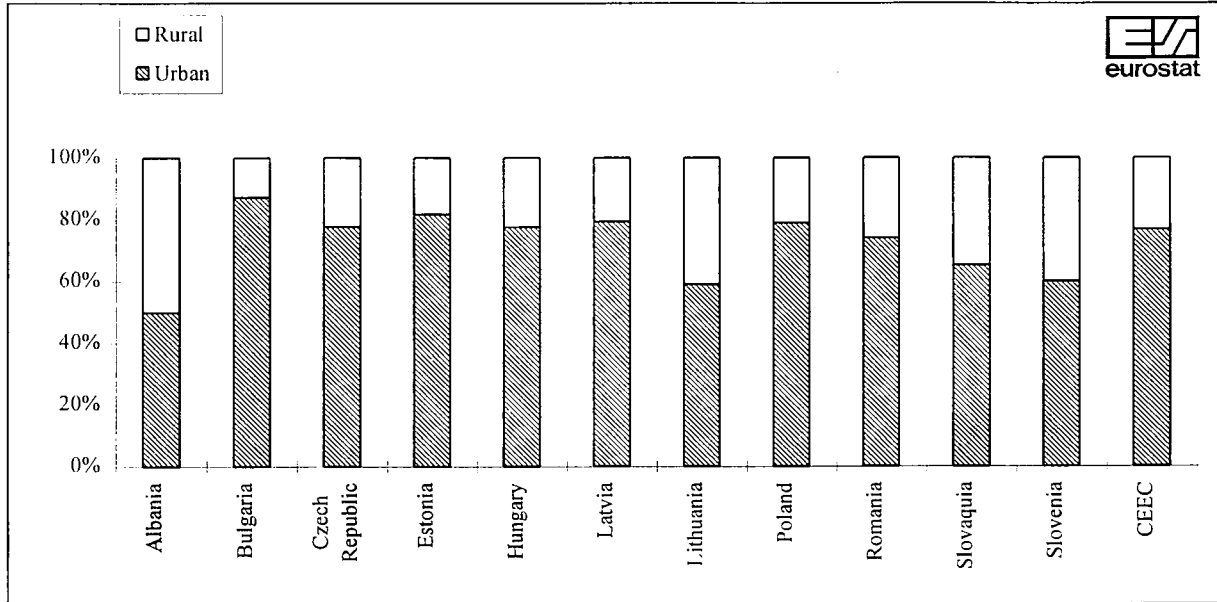


Source: Eurostat PECO

2.3. Predominantly in urban areas

The majority of enterprises are situated in urban areas (77%), where the density of enterprises per inhabitant (38 per 1 000 inhabitants) is double that of the rural areas.

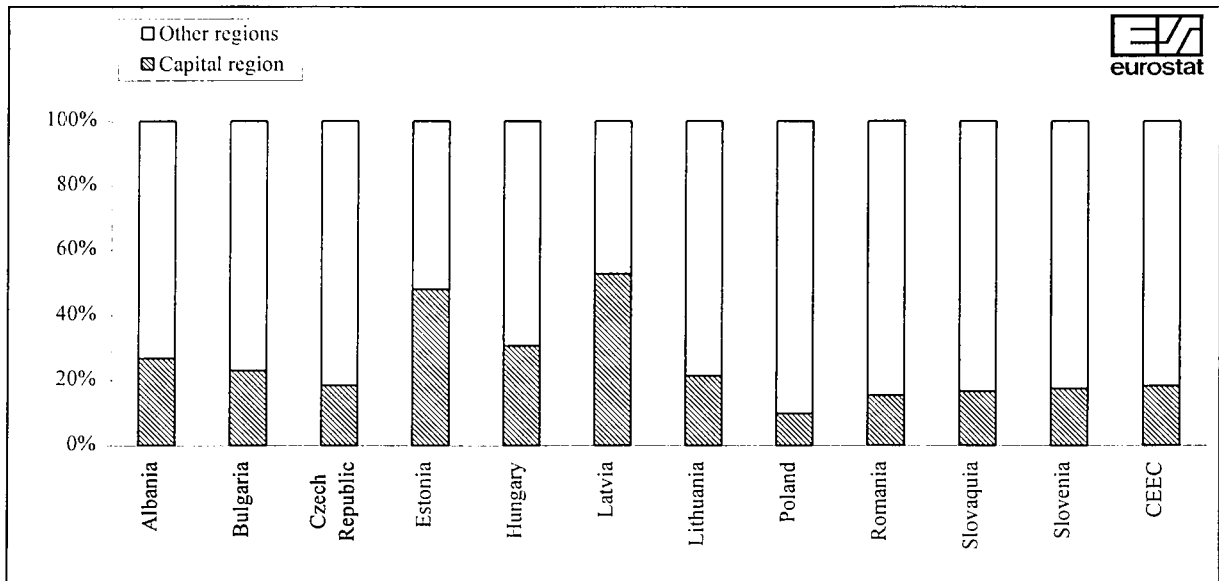
Figure 5 : Distribution of enterprises by zone



Source: Eurostat PECO

The regions around the respective capital cities account on average for 18% of all enterprises, with a density (49 per 1 000 inhabitants) well in excess of other regions (28 per 1 000).

Figure 6 : Distribution of enterprises by region

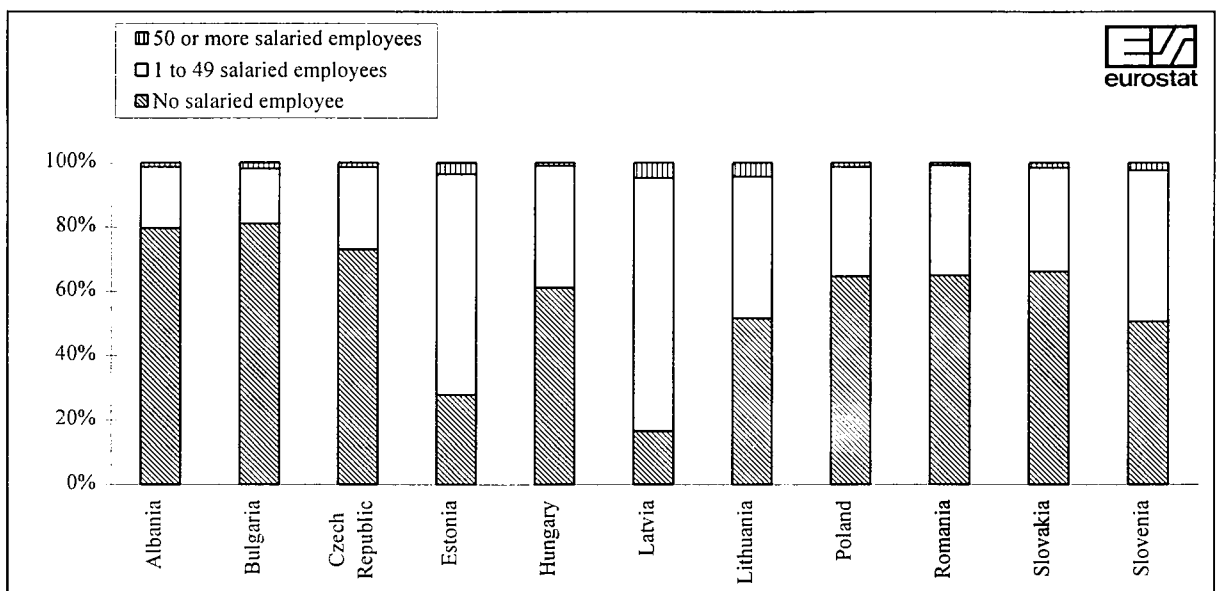


Source: Eurostat PECO

2.4. High proportion of very small enterprises

The majority of enterprises are very small (no salaried employees). The proportion of medium-sized and large enterprises (over 49 salaried employees) is almost negligible, except in countries which have not experienced the same upsurge in the creation of new enterprises as in most countries.

Figure 7 : Distribution of enterprises by size class



Source: Eurostat PECO

The breakdown of total employment by size of enterprise is obviously very wide-ranging.

Figure 8 : Distribution of employment by enterprise size class



Source: Eurostat PECO

Medium-sized and large enterprises account for a similar slice of the total in both geographical areas, the EU and the CEECs. Enterprises with no salaried employees do, on the other hand, feature more largely both in number and in terms of total employment in the central and eastern European countries.

Table 3 : Enterprises and employment: comparison of CEEC and the EU (%)

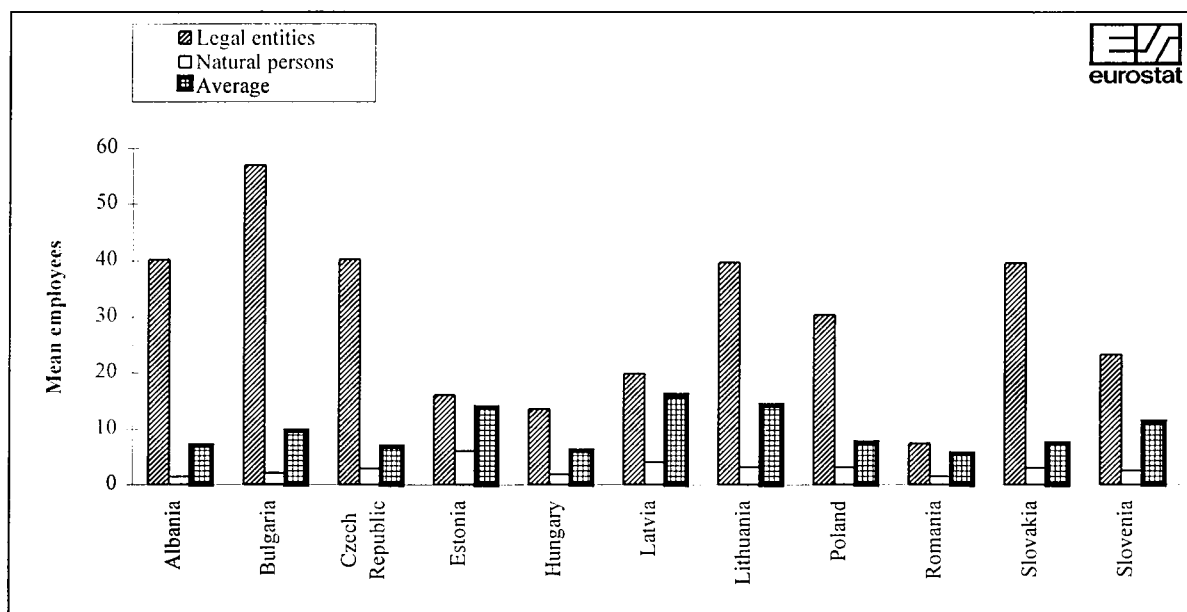
	Number of enterprises		Employment	
	CEEC	EU	CEEC	EU
No salaried employee	66,2	49,7	14,9	9,7
1 to 49 salaried employees	32,4	49,2	34,0	40,1
50 or more salaried employees	1,4	1,1	51,0	50,2
Total	100,0	100,0	100,0	100,0

Source: Eurostat PECO

Micro-enterprises with a workforce of less than half a full-time employee are springing up in Slovenia, Slovakia and the Czech Republic. These probably represent additional activities carried out by persons who have in any case another source of income (e.g. as salaried employees). These micro-enterprises are not generally counted as enterprises in the statistics compiled by the Member States of the European Union.

The average size of enterprises, 7.4 employees, is quite comparable to the average size in the European Union (6.5 employees). As in the EU Member States, however, there is a great difference in size between sole proprietorships and companies.

Figure 9 : Average size of enterprises per type of unit

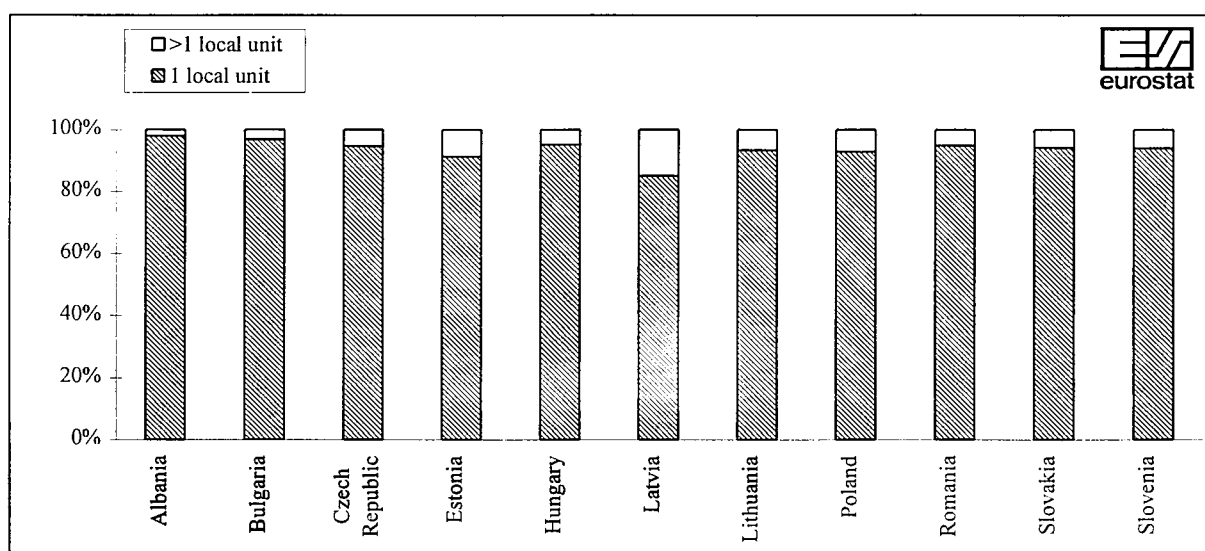


Source: Eurostat PECO

2.5. Few enterprises with more than one establishment

The majority of enterprises (95%) have only one establishment (local unit).

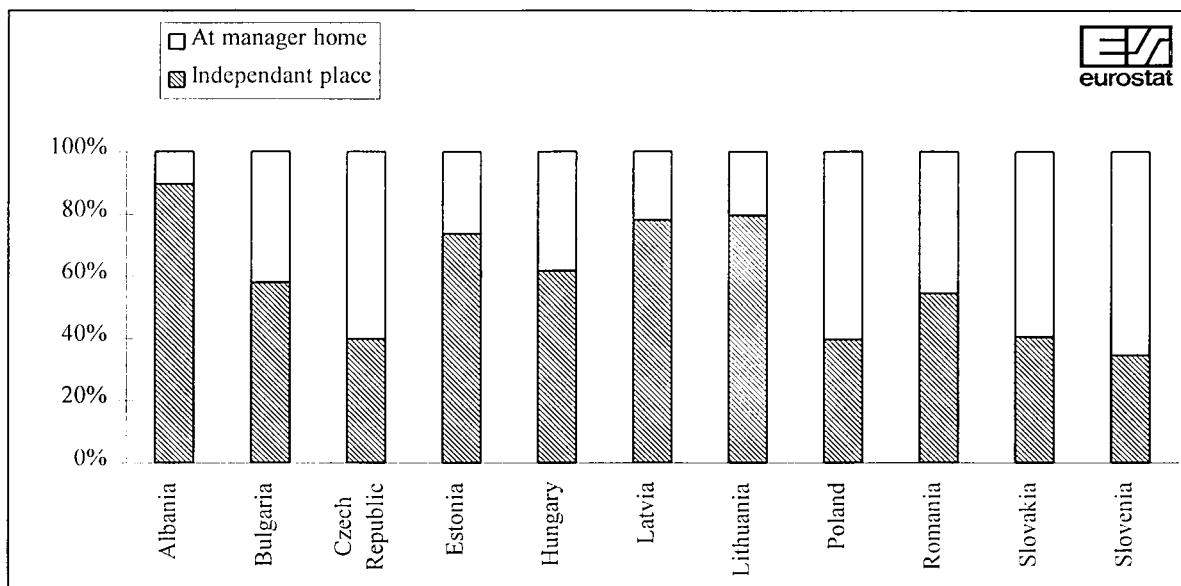
Figure 10 : Distribution of enterprises by number of local units



Source: Eurostat PECO

Over half of the enterprises carry out their activities in the home of the person setting up the company, although once again considerable differences can be observed between the different countries.

Figure 11 : Distribution of enterprises by principal place of activity

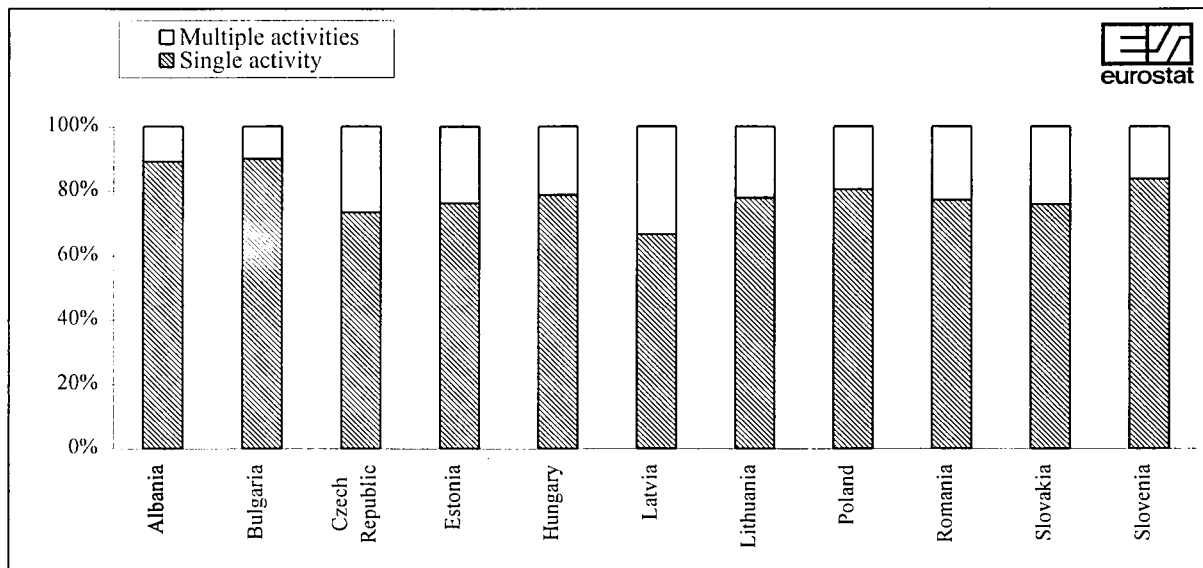


Source: Eurostat PECO

2.6. Single activity prevalent

As in the European Union, there are few enterprises carrying out multiple activities. They account for only 21% of the total.

Figure 12 : Distribution of enterprises by number of activities



Source: Eurostat PECO

The breakdown by main sector of activity is fairly similar to the situation in the European Union.

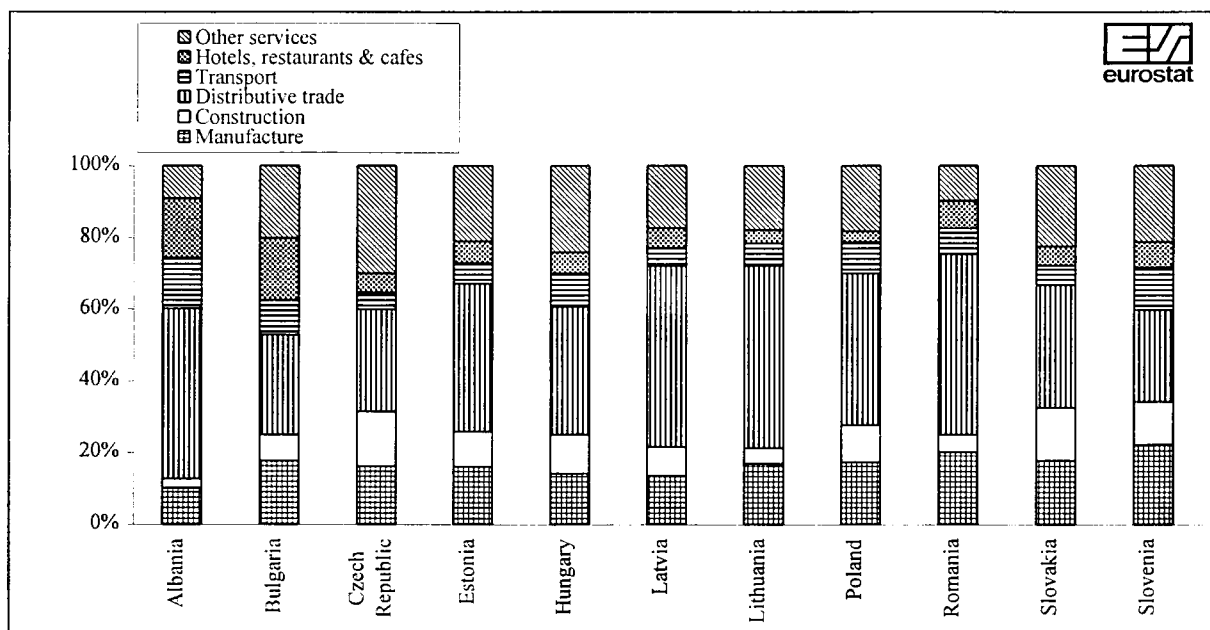
Table 4 : Distribution of enterprises by sectors of activity in CEEC and in the EU (%)

Sector of economic activity	CEEC	EU
Manufacture	16,9	13,3
Construction	10,6	12,7
Distributive trade	37,6	31,8
Hotels, restaurants & cafes	6,1	8,5
Transport and services	28,7	33,6
Total	100,0	100,0

Source: Eurostat PECO

The European Union has a larger proportion of service enterprises, whilst the countries of central and eastern Europe remain more industrial with a strongly developing commercial sector. Albania and Bulgaria stand out for their high proportion of enterprises in the Horeca sector (hotels, restaurants and cafes).

Figure 13 : Distribution of enterprises by sector of activity



Source: Eurostat PECO

2.7. Almost three-quarters of all jobs filled by salaried employees

The breakdown of employment by category reveals that salaried employees make up 71% of the employment generated by enterprises. Managers and non-salaried members of their families account for 19%. Finally, almost 10% of the jobs created take the form of services supply contracts paid on a fees basis.

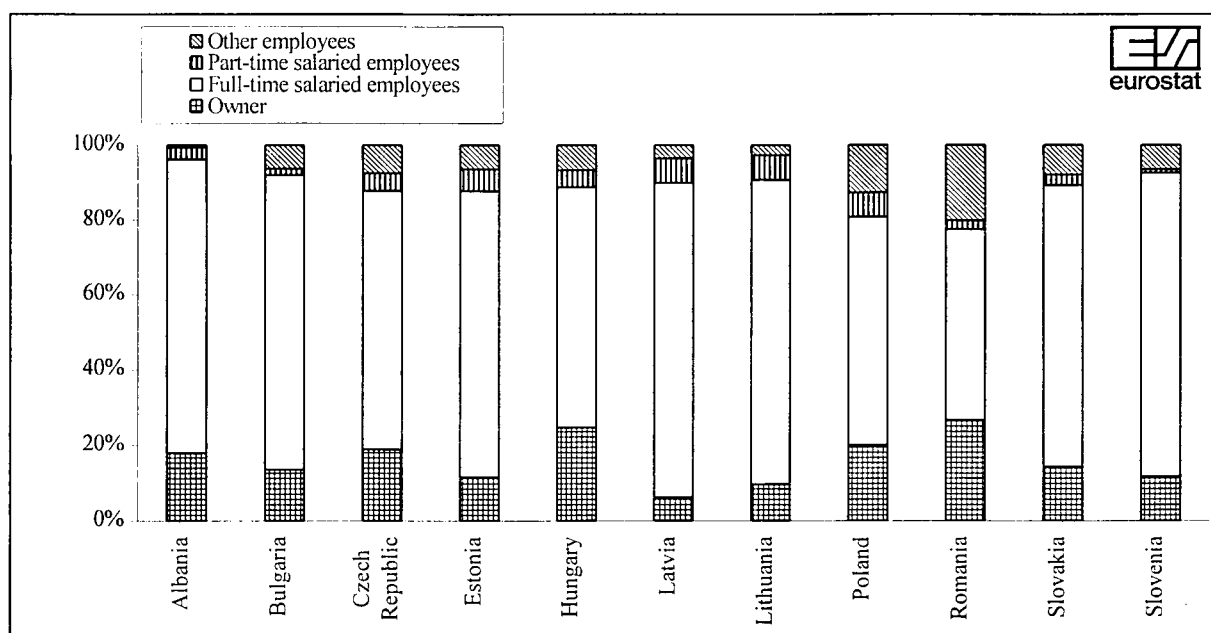
Table 5 : Total distribution of employment by type of employment (%)

Employment category	Percentage
Owner	18,9
Full-time waged	66,8
Part-time waged	4,6
Other labour	9,8
Total	100,0

Source: Eurostat PECO

This division of labour varies depending on the country. Romania does, however, stand out on account of its low proportion of salaried employees.

Figure 14 : Distribution of employment by type of employment

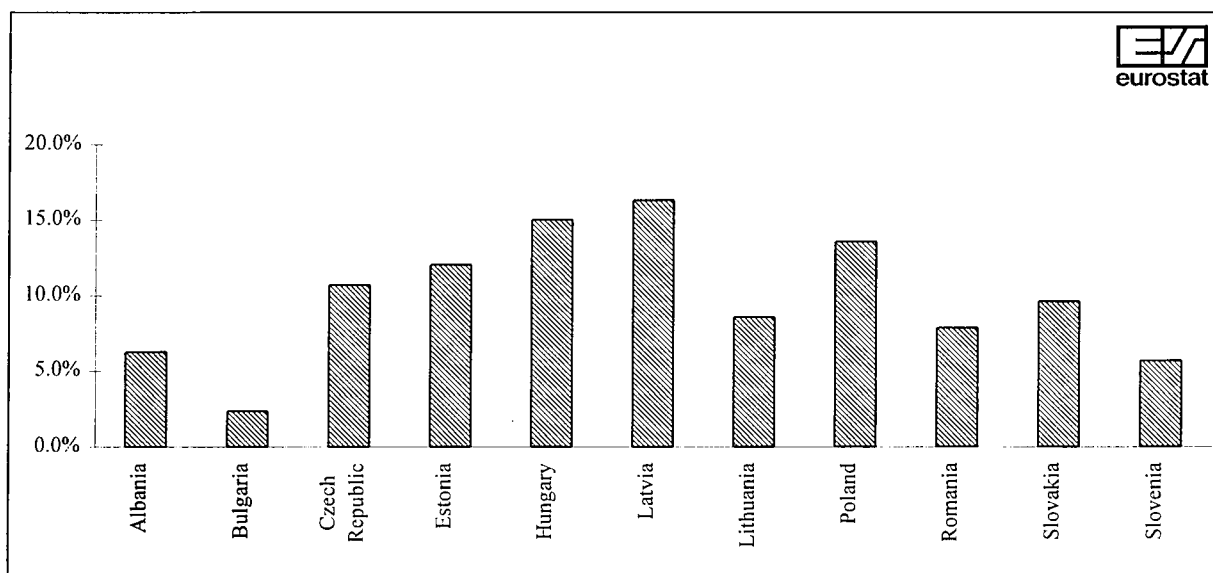


Source: Eurostat PECO

2.8. Around 10% of jobs in enterprises dependent on foreign capital

Only 9.6% of the 486 000 public and private limited liability companies are dependent on foreign capital, most often in the form of majority holdings. In terms of the number of enterprises, foreign capital participation is very low (1.3%), but when it comes to the share of total employment, these enterprises account on average for 10.8% of the jobs. Here again there are substantial variations between the different countries.

Figure 15: Share of employment by enterprises with foreign capital participation



Source: Eurostat PECO

The work on the panel goes on

The nature of a panel is to allow analyses to be carried out over a long period.

In September of each year a new survey is launched on a representative sample of enterprises created during the course of the preceding year. This series of surveys should make it possible to study how the conditions for setting up enterprises evolve, conditions which should gradually stabilise some years after the start of the transition process. Initial results are expected in the spring of 1997.

In addition, it is planned to carry out a follow-up survey every two years in order to monitor whether enterprises are developing or disappearing. The first of these follow-up surveys is planned for September 1997, with the initial results being published in the spring of 1998.

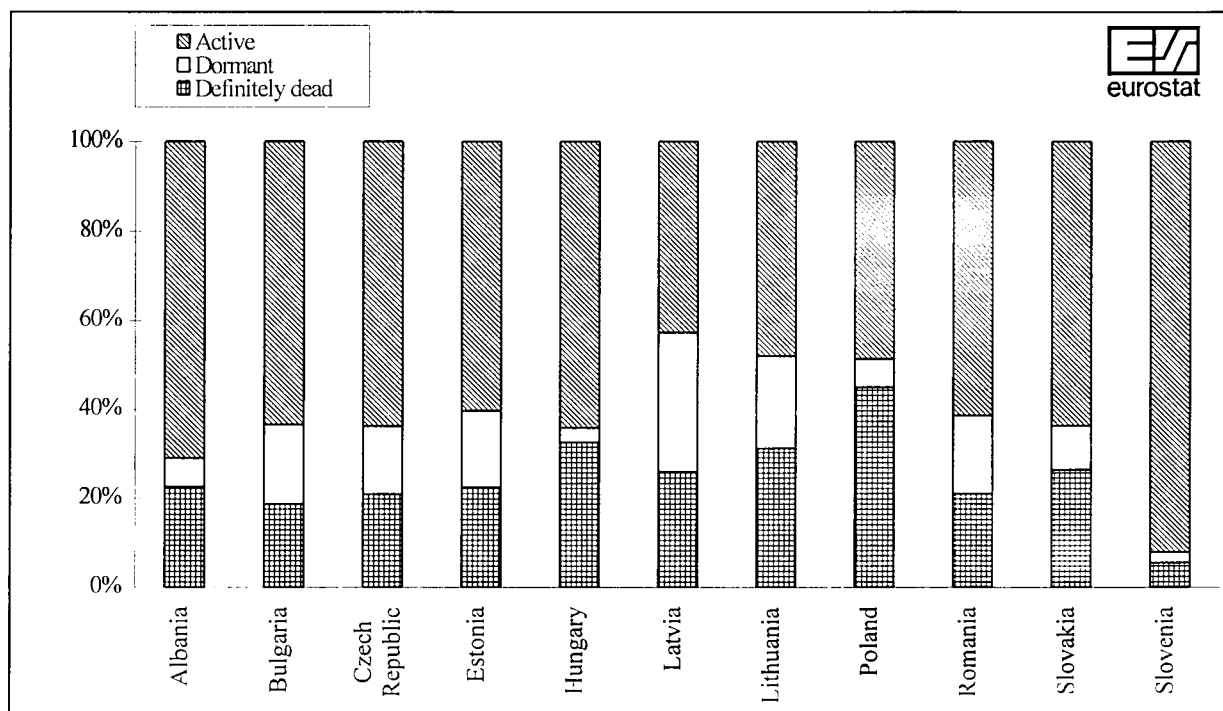
The panel is an excellent way to measure the convergence of the production structure of the CEECs towards the European Union.

3. THE DEVELOPMENT OF THE ENTERPRISES

3.1. Serious difficulties in surviving

For every 100 active enterprises, 18 dormant units claim that they did not carry out any activity but do hope to start or resume operations. 55 say that they have definitively closed down all operations. These figures are obviously influenced by the registration practices of the countries. Whilst the situation varies considerably from country to country, closures were particularly well recorded in Slovenia.

Figure 16 : Status of recorded units

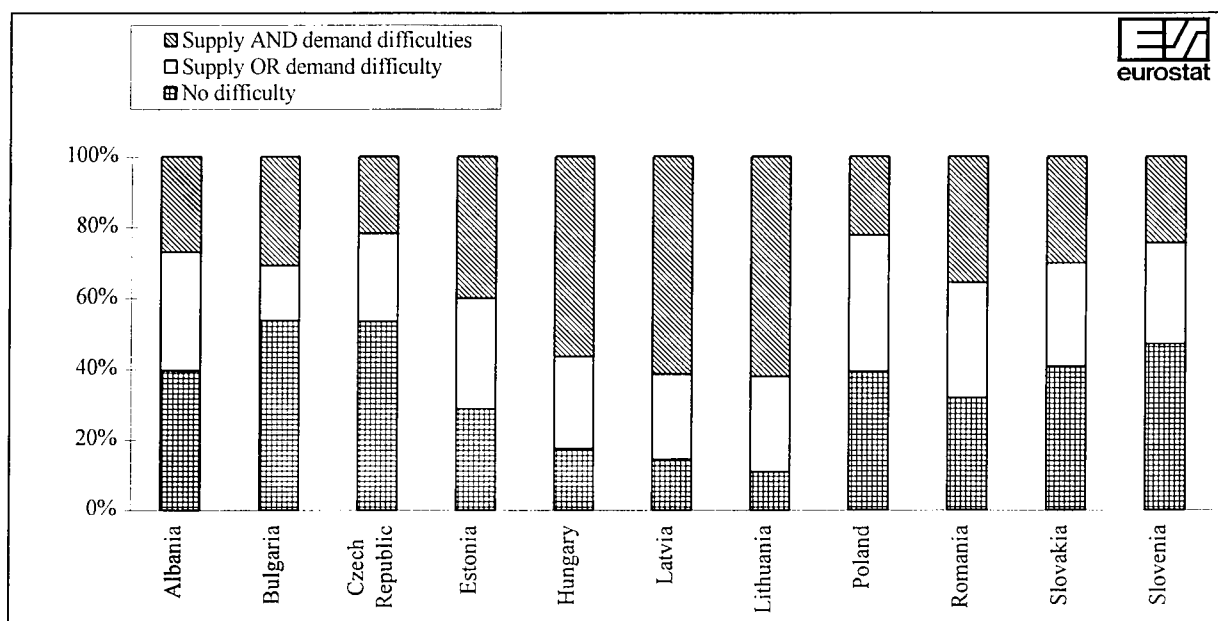


Source: Eurostat PECO

Less than 3% of the enterprises which have definitely stopped all activities stated that these activities had been taken over by another entrepreneur; 5% declared that they had been made bankrupt.

61% of the active enterprises admit to having serious difficulties in surviving or developing, half of these attributing this to their production conditions (supply) as well as the market situation (demand). The loudest complaints came from enterprises in Lithuania, Latvia and Hungary.

Figure 17 : Distribution of enterprises according to cumulative difficulty



Source: Eurostat PECO

52% of the active enterprises complained about their production conditions. The most recurrent problems are the absence of own resources, the lack of credit facilities offered to enterprises and delays and defaults in payments by customers. The absence of a skilled labour force is seen as a major difficulty in the Czech Republic and Slovenia. Albanian and Romanian enterprises suffer from a lack of technology.

Table 6 : Distribution of enterprises with perceived production difficulties by type of difficulty (%)

Category	Albania	Bulgaria	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia	Slovenia	Total CEEC
No funds	68	82	73	53	83	87	81	77	78	70	68	77
Lack of credit	36	16	28	47	16	38	24	39	25	41	32	28
Deficiency of payment	0	2	21	42	5	19	19	31	7	30	13	17
Lack of skilled workers	1	9	20	13	5	10	8	14	3	12	21	11
Lack of technology	14	6	10	9	3	10	6	12	17	8	9	9
Lack of raw materials	9	7	6	5	2	8	9	5	13	8	3	6

Source: Eurostat PECO

40% of the active enterprises claim difficulties with demand. The absence of demand from clients with strong purchasing power is widely cited, as is the surfeit of competition. Too many enterprises have been set up and some are likely to disappear. This viewpoint is particularly widespread amongst entrepreneurs in Albania and Poland. Entrepreneurs in Poland, Slovenia, Latvia and Lithuania insist that this surfeit of domestic competition together with the added pressure of imports results in rock bottom price levels. However, a fairly significant proportion of entrepreneurs in Poland and the Czech Republic in particular

are aware of the difficulties caused by the fact that their enterprise is not well known and that their marketing activities are inadequate.

Table 7 : Distribution of enterprises with perceived demand difficulties by type of difficulty (%)

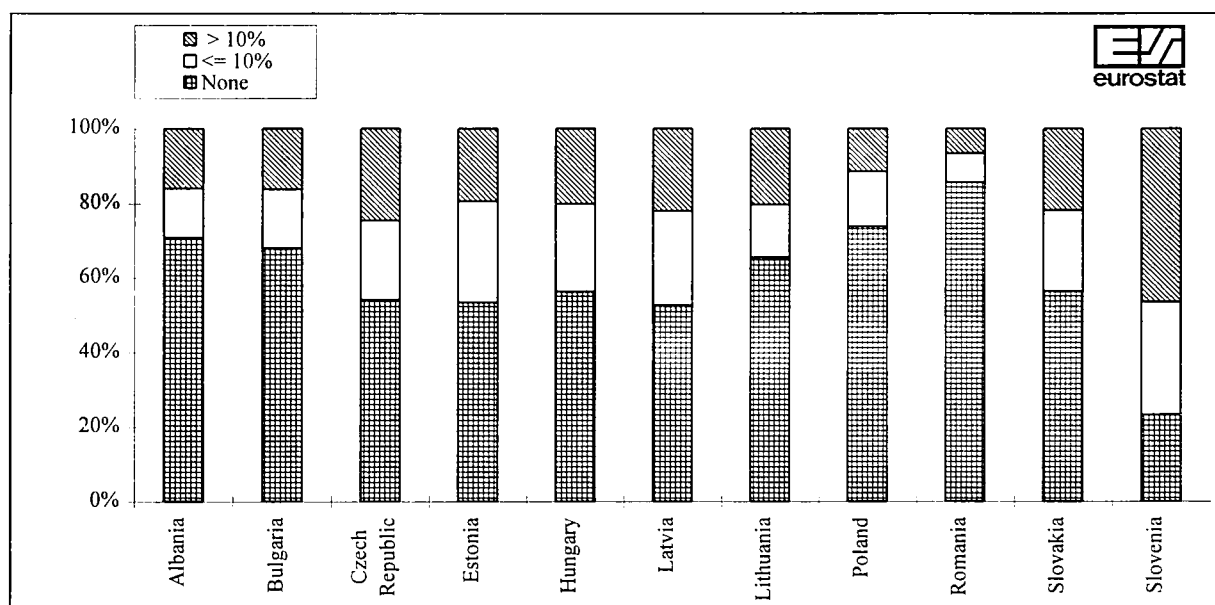
Category	Albania	Bulgaria	Czech Rep.	Estonia	Hungary	Latvia	Lithuania	Poland	Romania	Slovakia	Slovenia	Total CEEC
No solvent demand	34	57	60	59	54	83	73	62	66	79	55	61
Too much competitor	80	47	48	50	47	54	57	72	48	40	57	56
Too low market prices	26	19	13	10	8	34	31	44	10	21	33	24
Lack of notoriety	3	17	31	23	9	15	18	30	21	18	18	22
Lack of marketing ability	1	9	23	20	4	17	9	22	11	17	19	15

Source: Eurostat PECO

3.2. Limited expansion

In the face of so many difficulties, enterprises find it difficult to expand. 65% stated that they had not carried out any investment during the previous year, and only 17% invested more than 10% of their turnover. The situation was better in Slovenia, but worse in Romania and Poland.

Figure 18 : Distribution of enterprises by level of investment (% of turnover)



Source: Eurostat PECO

When asked about their efforts to adapt to the market, 9% of entrepreneurs replied that they thought that the nature of the goods or services they produced would change appreciably over the next six months.

16% of the enterprises established before 1994 stated that they had substantially changed the goods/services they produced since setting up.

4. THE ORIGIN OF THE ENTERPRISES

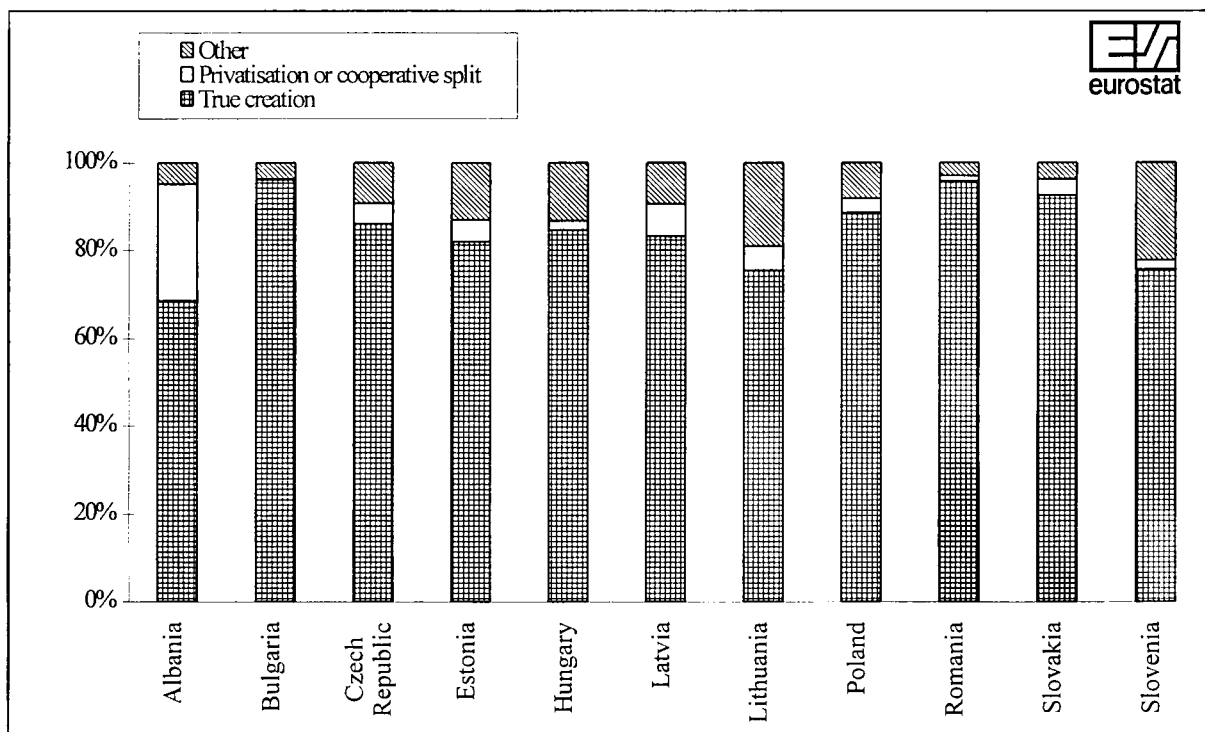
4.1. A majority of new enterprises

In all countries, with the exception of the Baltic states and Albania, the proportion of enterprises created through the privatisation of former State enterprises or splitting up cooperatives is negligible. It is mainly larger enterprises which have been privatised.

The vast majority of enterprises have been created from scratch without any resumption of former activities.

However, particularly among the more recently established enterprises, there is a trend for the appearance of enterprises which result from the total or partial takeover of existing private enterprises, although the proportion of such cases is still much less than in the European Union.

Figure 19 : Distribution of enterprises by type of creation

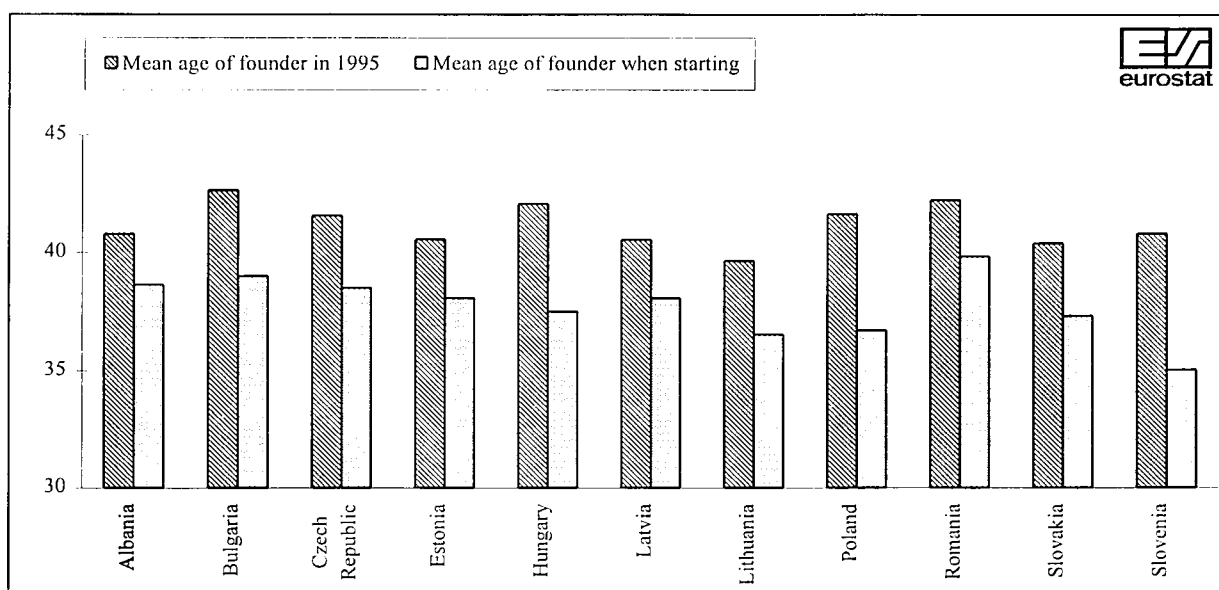


Source: Eurostat PECO

4.2. Fairly low average age of persons setting up enterprises

The average age of persons setting up enterprises was 41.7 in September 1995. On the date when the enterprise was established, it was just 37.8³.

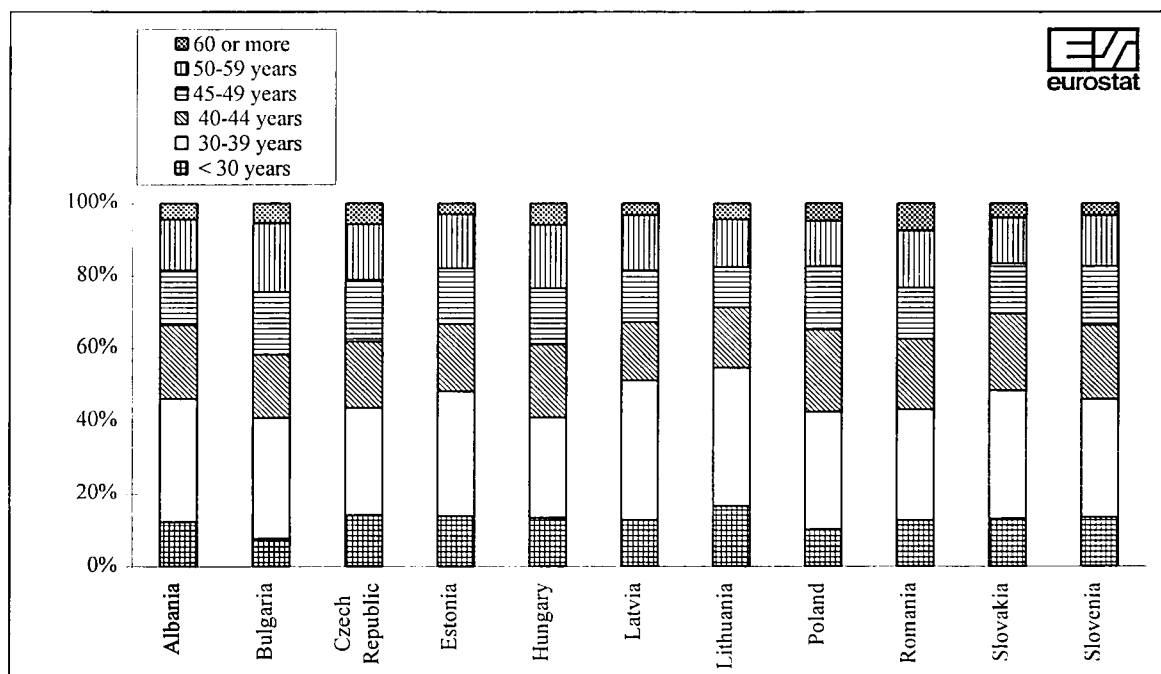
Figure 20 : Average age of the founder/manager of the enterprises



Source: Eurostat PECO

In September 1995, the distribution of enterprises by age of their founder/manager was fairly disparate; less than 40% of enterprises were managed by persons aged over 45.

Figure 21 : Distribution of the enterprises by age of the founder/manager



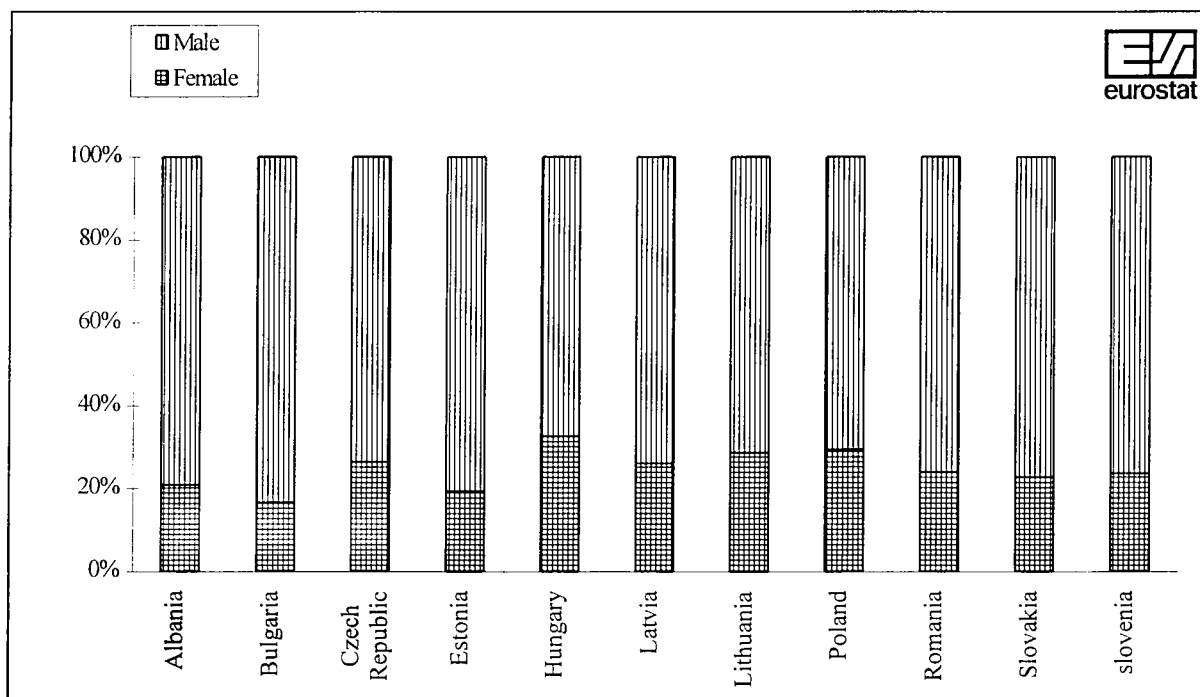
Source: Eurostat PECO

³ The difference corresponds to the average age in September 1995 of enterprises registered before the first of January: i.e. just under 4 years. Nothing is yet known about the age of those persons who set up their enterprises in 1995.

4.3. Few women entrepreneurs

On average, 27% of persons setting up enterprises are women.

Figure 22 : Distribution of the enterprises by sex of the founder/manager



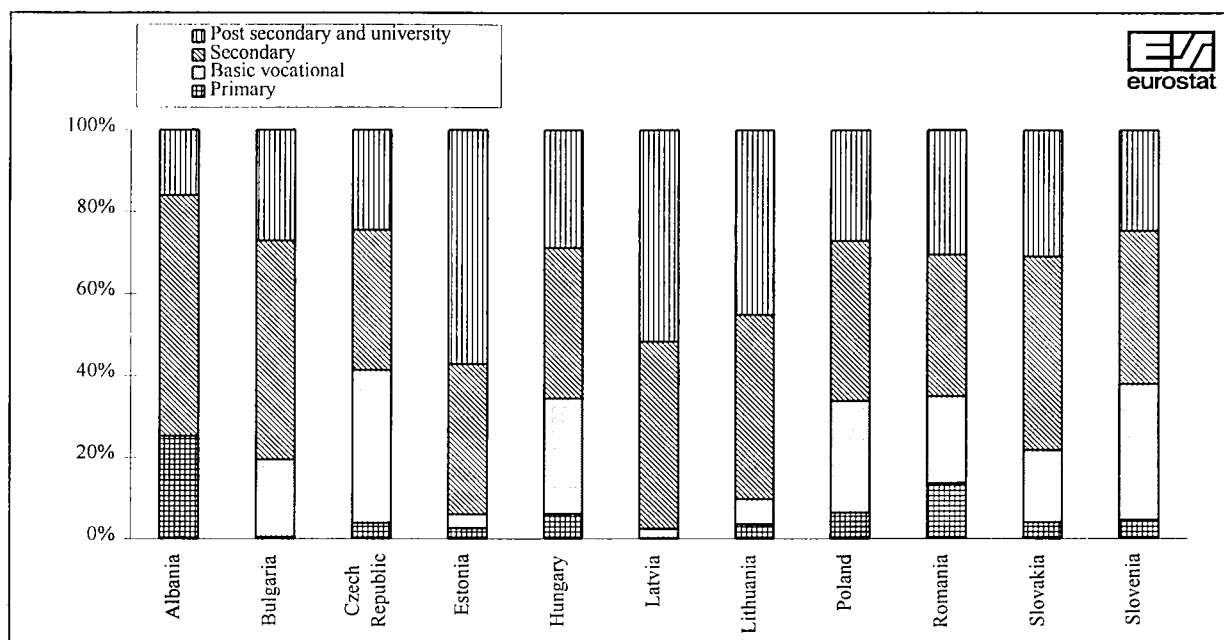
Source: Eurostat PECO

4.4. All levels of training

An analysis of the educational background of the founders/managers of enterprises produces the following three groups of countries:

- the Baltic countries, where setting up enterprises has remained the prerogative of persons who have received some form of higher education;
- at the other extreme, Albania, where management staff with higher education qualifications have been less involved in setting up enterprises than persons with primary education.
- all the other countries, where all strata of the population have apparently been involved in setting up enterprises.

Figure 23 : Distribution of the enterprises by educational background of the founder/manager

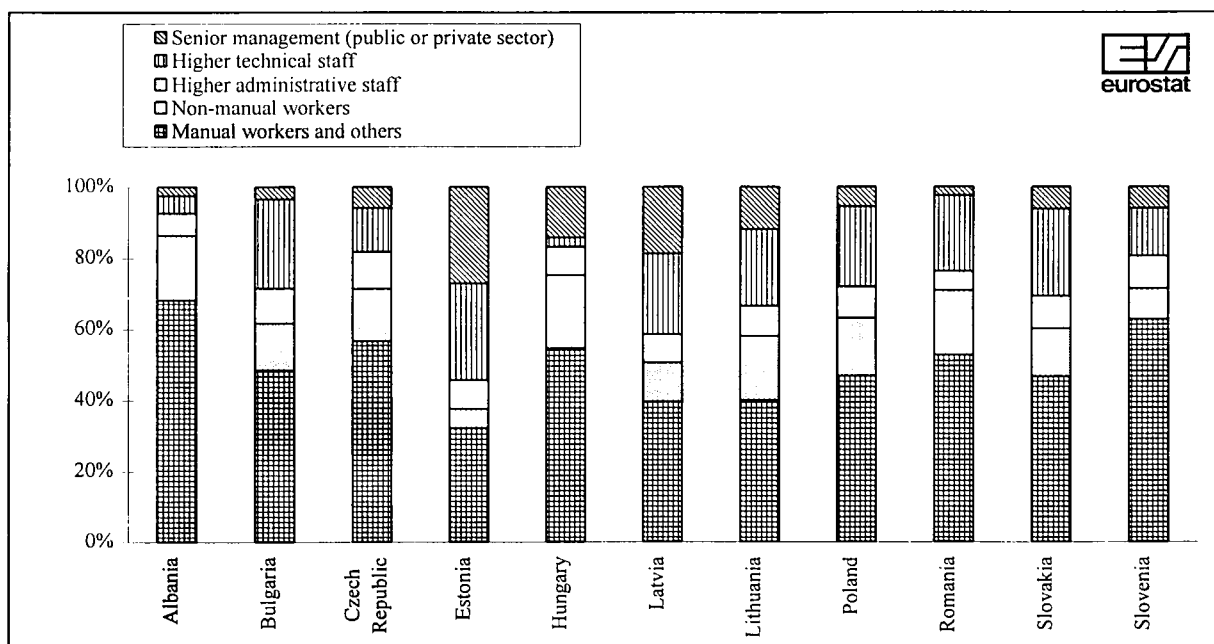


Source: Eurostat PECO

The analysis by socio-professional category confirms and completes this profile of the founder/managers of the enterprises.

Senior managers of former enterprises (often in the public sector) account on average for 4% of persons setting up enterprises. Higher staff account for 34% of founders/managers of enterprises, 24% being technical staff (engineers and technicians) and 10% administrative staff (teachers, lawyers and economists). 59% of those setting up enterprises were other staff: 18% had administrative or commercial duties and 41% were manual workers.

Figure 24 : Distribution of the enterprises by socio-professional category



Source: Eurostat PECO

Prospects

The results of the first survey are subject to various analyses:

- Each of the statistical offices is in charge of analysing and publishing the results of the survey for their respective countries.
- Eurostat is taking care of the comparative analyses and publications. A volume presenting the detailed results is scheduled for the beginning of 1997.

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- 8 Miljö (turkos)
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European Commission

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