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w Poznaniu

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ASPEKTY PRAWNE, FINANSOWE I HANDLOWE

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Adam A. Ambroziak[1]

REINDUSTRIALIZATION OR SERVITIZATION: TRADE TENDENCIES IN THE EUROPEAN UNION INTERNAL MARKET

Introduction

The emergence of intra-Union trade is the outcome of a deepening integration, which started with the customs union in 1968 and evolved into the internal market in 1993. Gradual integration, first within the framework of the European Communities, and then the European Union, eliminated many barriers to ensuring the free movement of goods and services. Its development is influenced by various factors, both internal and external. The first ones are closely linked with initiatives of the EU institutions and actions of the Member States connected with the implementation of the EU legislation [Ambroziak 2011, 2012]. Among external factors, however, we should pay special attention to the consequences of the recent financial and economic crisis, the intensified protectionist and interventionist actions of the EU members and the worldwide trends resulting from globalisation. On the one hand, some EU Member States have started to call for reindustrialization [Ambroziak 2014], while others are seeking economic growth in the so called servitization of the manufacturing industry[2]. Both approaches do not seem to be mutually ex-

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[2] The term "Servitization of business" is to be understood as adding value to the core corporate offerings through services. As Vandermerwe and Rada noticed the trend is pervading almost all industries, it is customer demand-driven, and perceived by corporations as a way to sharpen their competitive edges. Modern corporations are increasingly offering fuller market package of customer-focused combination of goods, services, support, self-service, and knowledge. It is worth noting that already in 1988 it was foreseen that this movement would continue to make the dividing line between traditional manufactures and service providers less clear and change some of the relationships and competitive dynamics in which business operates [Vandermerwe and Rada 1988, pp. 314–315]. Moreover, servitization values asset performance or utilization rather than ownership and achieves differentiation through the integration of product and services that provide value in use to the customer [Baines et. al. 2007, p. 1547]. Recently servitization can also be recognized as the process of creating value by

clusive, but, so far, at the EU level the European Commission has drafted two separate strategies: one for the development of industry [European Commission 2014a, 2014b] and the other one for services [European Commission 2000, 2002, Directive 2006/123/EC, p. 36]. Only recently in its work plan for 2015 did the Commission include the preparation of the Internal Market Strategy for Goods and Services, whose main aim is to deliver further integration and improve mutual recognition and standardisation in key industrial and service sectors, where the economic potential is the greatest [European Commission 2014c].

Considering the programming and political approach of the European Union thus far, the aim of this study is to assess the scale and product structure of exports to the EU internal market up until now and of the competitive position of individual Member States in intra-EU trade. With regard to the above, firstly we shall explain relationships between trade in goods and services in the internal market and with partners from outside of the EU. Then we will analyse the competitive position of the Member States in intra-EU trade in goods and services, which will enable a general assessment of trade development directions in the light of new challenges facing the EU: reindustrialization and servitization. The analysis uses data of the World Trade Organisation and Eurostat. To eliminate the impact of EU enlargement, we used aggregated data for EU-28 (for WTO data) and EU-27 (for Eurostat data) for the period 2000–2013, except for services, for which the data available were only from 2004 (the period 1980–2013 was used to position intra-EU trade against worldwide tendencies).

1. Relations between EU internal and external trade

The elimination of many barriers in the internal market should imply a considerable increase in the importance of intra-EU trade compared to extra-EU trade flows. In the period covered by the study 2000–2013, the share of intra-EU trade in goods in the total foreign trade of the Member States, however, was gradually decreasing from 68.0% in 2000 to 61.8% in 2013 for exports and, respectively, from 63.4% to 62.0% for imports (Figure 1). Also intra-EU trade in services dropped from 58% to 55% in exports (credits) and from 60% to 59% in imports (debits). The tendency was clearly influenced by the gradual increase of Member States exports outside of the EU as they are more and more intensely looking for new outlets.

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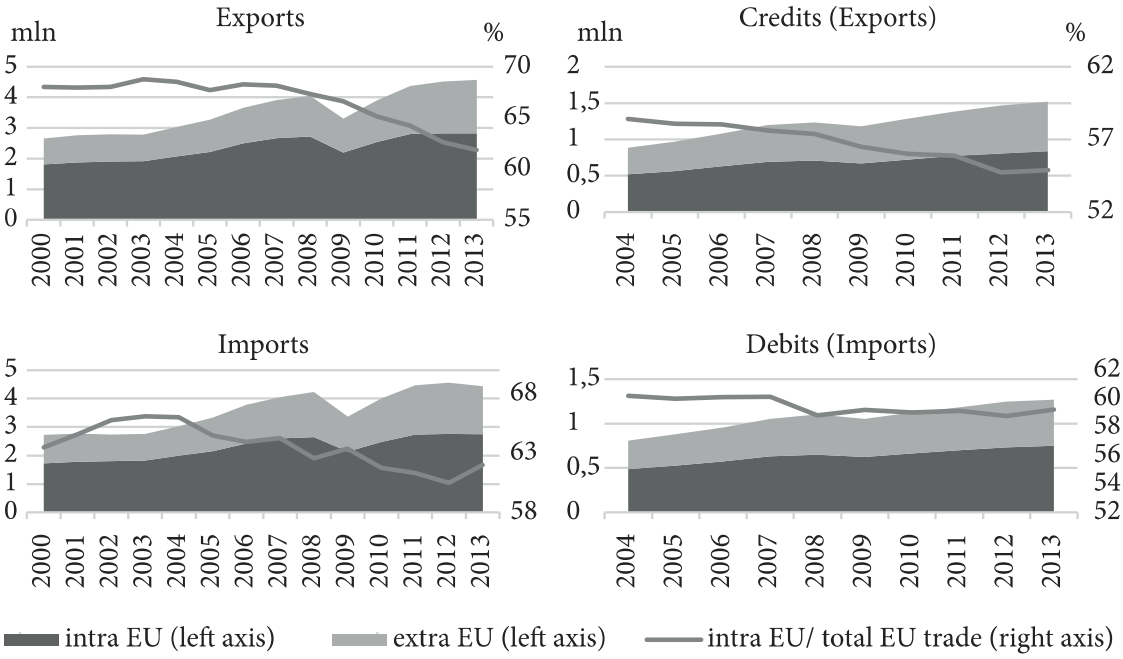
adding services to products [Baines et. al. 2009, p. 574]. Thus servitization extends the reach of the manufacturer ever closer to the customers and the customer's underlying needs [Schmenner 2008, p. 431]. So manufacturers tend to deliver these integrated products and services offerings using customer-centric strategies in order to provide "desire outcomes" for customers [Lightfoot , Baines and Smart 2013, p. 1412].



Notes: Left figure: trade in goods; right figure: trade in services

Figure 1. Value of intra- and extra-EU trade (left axis in mln EUR) and relations of intra-EU trade to EU total trade (right axis in p.c.) in goods in 2000–2013 and services in 2004–2013)

Source: Own calculations, Eurostat

Moreover, the analysis of the dynamics of changes in exports and imports allows us to conclude that for both goods and services the dynamics of intra-EU trade is slightly lower than the dynamics of exports outside of the EU (Figure 2). A higher reduction in the share of internal trade in Member States foreign trade for exports and one relatively minor for imports together with the relatively higher dynamics of extra-EU exports mean trade within the internal market is not as strongly displaced by extra-EU imports as we could have expected it to be. Hence, we may conclude that for the flow of goods, i.e., products of the manufacturing industry and for services, including those offered within servitization, the internal market still remains an attractive trade area.

The parallel analysis of data relating to trade in goods and services results in a positive verification of the thesis on the servitization of the manufacturing industry in the EU. While in the analysed period (covering only the years 2004–2013 due to limitations in available data), the overall volume of exports of goods in the internal market was slightly increasing, the increase in the exports of services was significant (Figure 3). At the same time we noticed that the relation between the exports of goods and the exports of services, at the intra- and the extra-EU level, is gradually decreasing, leading us to the conclusion that trade in goods is replaced with trade in services, both in the internal market and globally.

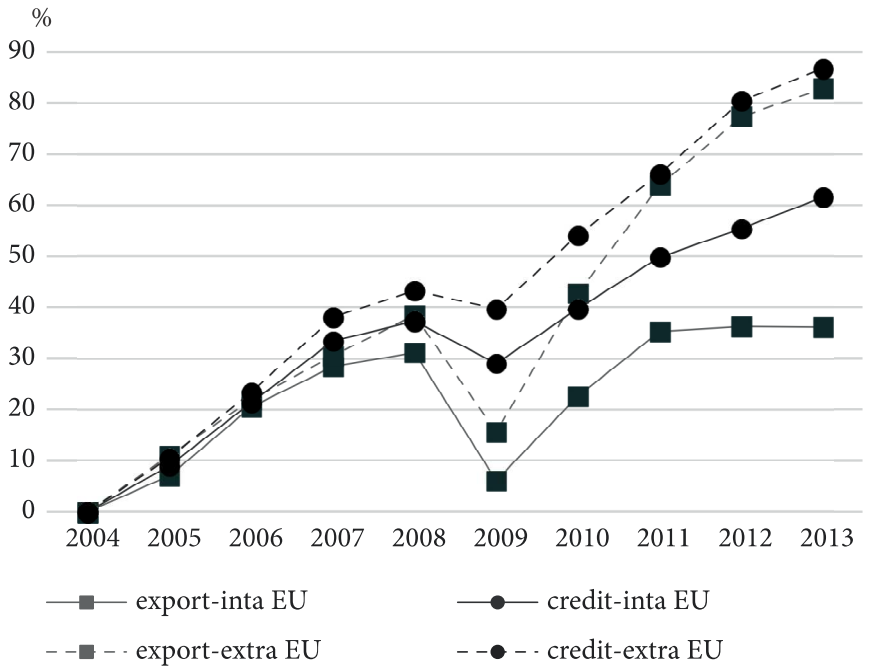


Figure 2. Dynamics of intra- and extra-EU trade in goods and services (2004 – base year)

Source: Own calculations, Eurostat

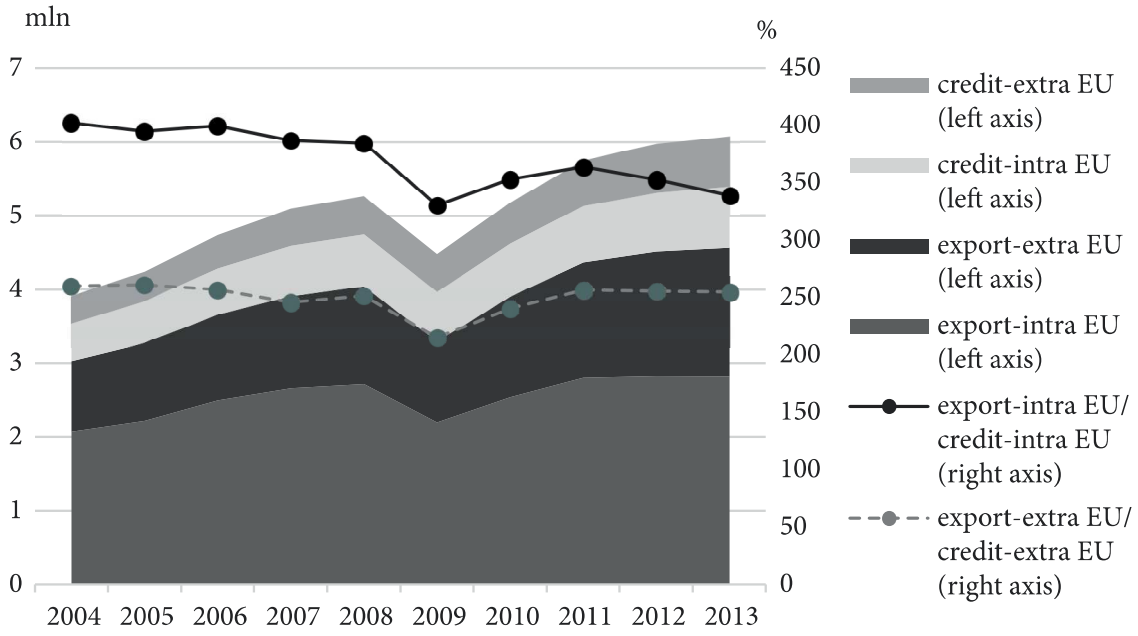


Figure 3. Change in intra- and extra-EU trade in goods and services (left axis in mln EUR) and the relations of intra-EU trade to extra-EU trade in goods and services (right axis in p.c.) in 2004–2013

Source: Own calculations, Eurostat

This conclusion, however, refers mainly to the Member States of the EU-15. In order to more precisely grasp the product change in trade in the internal market we studied the exports of goods and services for individual Member States in the years 2004–2013. To this end we calculated the correlation coefficient: the closer it is to 1, the higher the correlation, meaning an increase (or decrease) in the value of the exports of goods is accompanied by an increase (or decrease) in the sales of services; a negative value of the coefficient (closer to –1) means an increase (decrease) in the sales of goods is accompanied by a decrease (increase) in the exports of services. Our analysis brings us to the conclusion that the increase in intra-EU trade in goods and services took place at a similar pace, mainly in the countries which joined the EU in 2004 (except Cyprus). The countries of the EU-15 reported a much weaker correlation, which means the increase in exports of goods is accompanied by a slightly quicker increase in the sales of services in the internal EU market. A considerably higher increase in the trade in services and decrease in the sales of goods in the EU market in the analysed period was recorded for Ireland and Luxembourg (and a reverse dependence for Cyprus) (Table 1).

Table 1. Correlation coefficient for the value of exports of goods and services in the EU internal market in the years 2004–2013

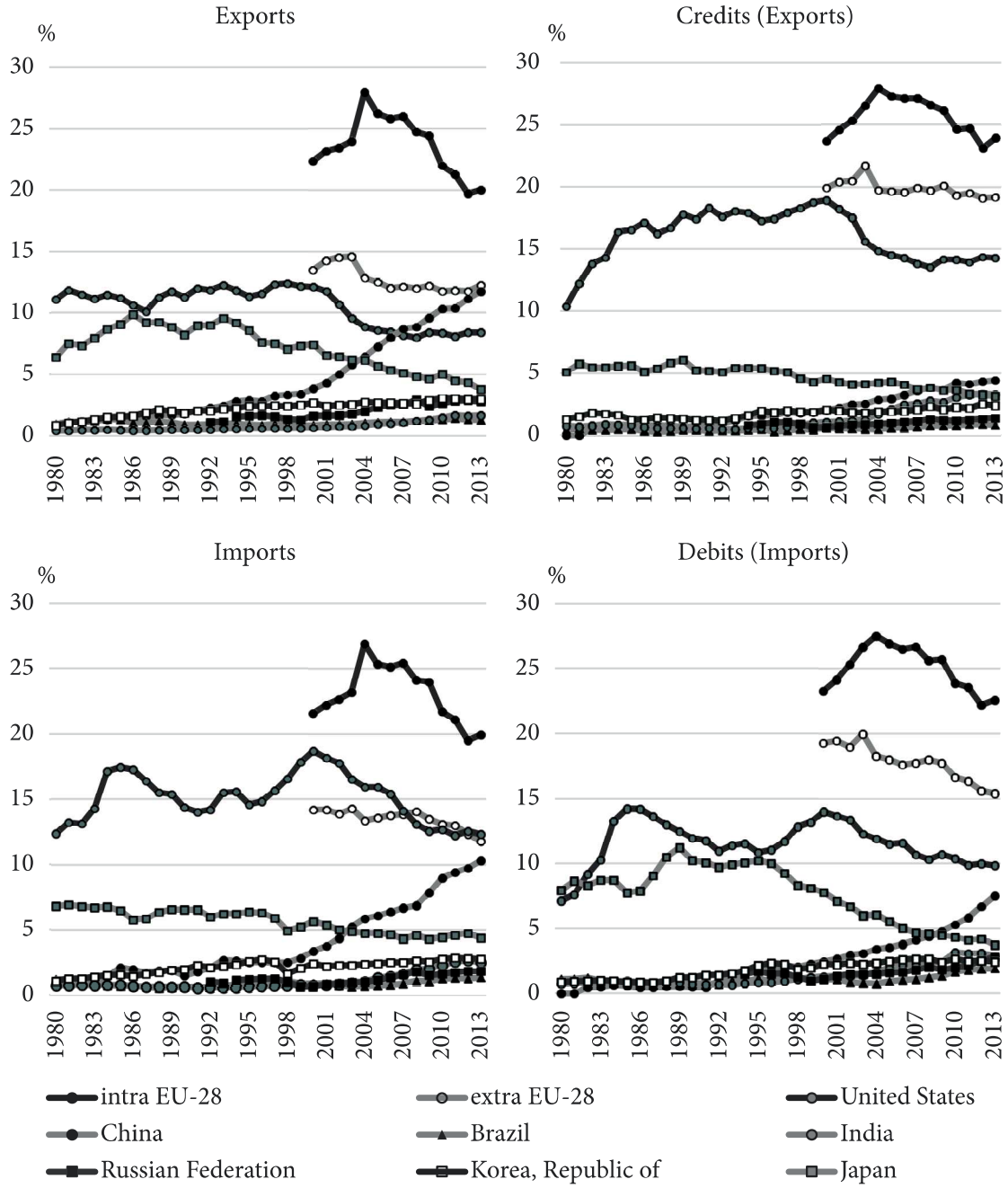
EU-27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV
0.90	0.68	0.80	0.97	0.82	0.76	0.92	–0.52	0.57	0.94	0.19	0.62	–0.04	0.90
LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK
0.93	–0.19	0.96	0.45	0.80	0.87	0.99	0.85	0.76	0.97	0.87	0.01	0.68	0.35

Source: Own calculations, Eurostat.

2. Intra-EU trade position in global trade

Over the period of the most recent 30 years, trade in goods under the umbrella of European economic integration, despite its visible fluctuations, vis-à-vis global trade value, managed to maintain its prominent position. In 1980, the intra-Community exports of states, which later became the EU-15, attained ca. 22% of global exports and, after the period of a flourishing internal market (from mid-1980s till mid-1990s when it was reaching even ca. 28%), it finally recorded ca. 24% in 2003 (Figure 4). The enlargement with countries of Central and Eastern Europe obviously increased its share in global trade again to ca. 28% in 2004, before it gradually dropped to ca. 20% in 2013, its lowest level recorded for the last 30 years.

When it comes to trade in services, the share of intra-EU exports in total global trade which in 2013 reached ca. 24%, is worth noting. From the available data we may learn that in 2004 it exceeded 28%, before gradually decreasing to return to its



Notes: left figures: trade in goods; right figures: trade in services

Figure 4. Share of exports and imports of key economies in global trade in goods and services in the years 1980–2013 (in p.c.)

Source: Own calculations, World Trade Organization database

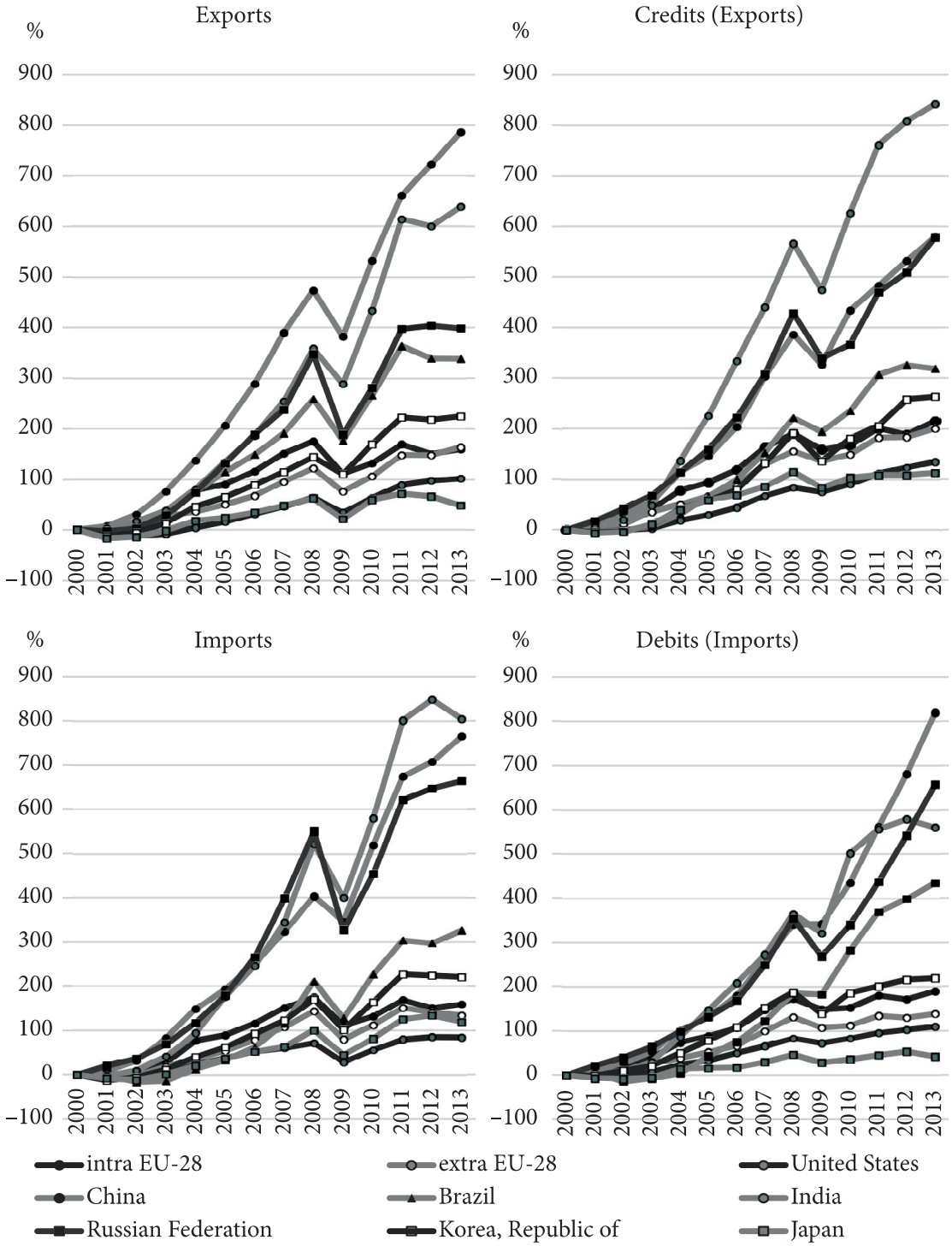
initial level. In spite of this, in recent years its share in global trade has remained higher than that of the trade in goods (by ca. 5 p.p.). Also the relation of the value of services exported outside of the EU to the global value of the trade in services was much higher for the Union than for, e.g., the U.S. Similar dependencies may

be found in Member States imports of services (within the internal market and in the exchange with extra-EU partners), although in this case a significant drop was recorded in the shares of more developed countries compared to countries like China, India or Russia.

This means that the export position of the EU Member States, both in intra- and extra-EU trade, is still relatively strong and stable in the exports of services compared to their increasingly weaker position in the trade in goods. Despite the creation of the internal market, the elimination of many barriers to trade, and EU enlargement with new states strongly integrated with the old EU-15, the role of intra-EU trade in global trade in goods diminishes – mainly in favour of exports from the Far East. The U.S. or Japan reveal similar tendencies, as since the beginning of the 21st century they have been reporting ever smaller shares of their exports and imports in the global trade in goods, doing much better in the exports of services. This confirms a worldwide trend in trade patterns where more developed countries specialise in the trade in services and limit the trade in goods.

The above conclusions are confirmed by the analysis of the dynamics of exports and imports of both goods and services of selected world economies (Figure 5). Particularly strong growth dynamics has been found for the foreign trade of the BRIC countries (Brazil, China, India, and Russia), while more developed countries report a much smaller growth. The reason for this is, obviously, a different starting point in the analysed period, which also allows identifying development trends in the foreign trade of these countries. A period of dynamic increase in trade in the first years of the 21st century was followed by a collapse in 2009 and an extremely slow comeback to the values from before the economic crisis. Recently, in the years 2010–2013, practically all the more developed economies reported either a slight decrease or an unchanged level of growth for both the imports and exports of goods compared to the base year 2000. For services, two phenomena were observed: a much smaller relative drop in the crisis year 2009 compared to the trade in goods, and a slightly higher increase in the turnover in the following years. This is indicative of the relatively higher resistance of the trade in services to the recent crisis in relation to the trade in goods. Growth dynamics is not as spectacular as for the BRIC countries, but also in this case the intra EU trade in services, and in goods, reported better results than in the case of Japan or the U.S. The above confirms the thesis on the still well developing foreign trade of the Member States within the EU internal market, in particular in the service sector.

How much foreign trade is linked with the economy can be confirmed, e.g., by its relation to the GDP. The share of intra-EU trade in goods in the EU GDP was gradually increasing in the years 2000–2013 (from 17% to 23%) although in 2003 and 2009 drops were recorded in comparison to previous years. A similar tendency and dynamics, though at much lower rates to the GDP (ca. 10–15%), were reflected by extra-EU exports, which behaved similarly to the foreign sales of the well de-

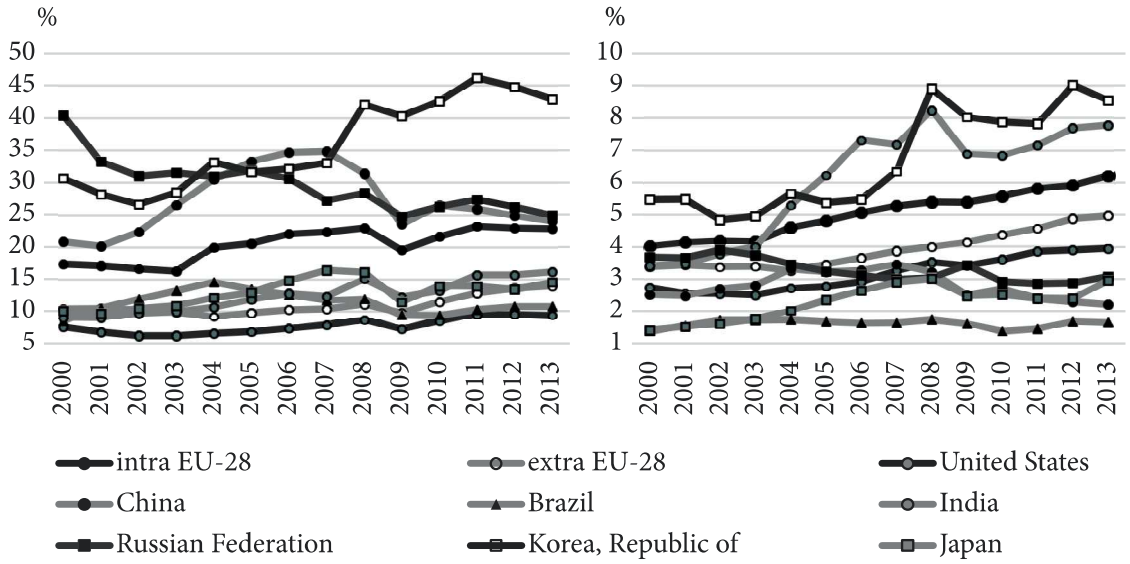


Notes: left figures: trade in goods; right figures: trade in services

Figure 5. Dynamics of change in the value of exports and imports of the main economies in the global trade in goods and services in the period of 2000–2013 (in p.c. compared to the base year 2000)

Source: Own calculations, World Trade Organization database

veloped economies of Japan and the U.S. A significantly higher share of exports of goods in domestic GDP was characteristic for China, Russia, and Korea, although also for these countries the values were slowly decreasing in recent years. When it comes to the exports of services, their share in GDP, both within the internal market and outside of the EU, was constantly increasing also in the times of the economic crisis, reaching respectively 6% and 5% of the EU GDP. In the above group of countries, the highest importance of the exports of services for the economy was reported for India and South Korea. Such a relatively high rank of the share of intra-EU trade in goods and services in GDP compared to the rest of the analysed cases reveals rather a high and constantly deepening dependence of the EU economy on trade between the EU Member States. However, the share of intra-EU trade in services in the GDP, is still relatively low compared to the trade in goods although, as we have demonstrated above, its growth dynamics is significant.



Notes: left figures: trade in goods; right figures: trade in services

Figure 3. Exports of goods and services of the key economies in the global trade in the years 2000–2013 in relation to GDP (in p.c.)

Source: Own calculations, World Trade Organization database

3. EU competitive position in trade within the internal market

The EU's competitive position in the internal market resulting from the ability of products originating from the Member States to compete with products offered by extra-EU partners is presented based on the analysis of two indices: the Lafay index – concerning relations between exports and imports – and the revealed comparative advantage (RCA) based on the flows of exports. When the Lafay index reaches

values above zero, the Member State in question enjoys a competitive advantage in the exports of a given group of products, vis-à-vis countries from outside of the EU. When the RCA index exceeds 1, the country in question has present revealed comparative advantages in sales in the EU single market. For both indices their reverse values are interpreted, respectively, as the absence of a comparative advantage or competitive advantage. In the survey we adapted the idea of the joint analysis of the RCA and Lafay indices [Ambroziak and Szczepaniak 2009].

The analysis of the competitive position of individual Member States in the EU internal market in relation to the inflow of goods from outside of the EU covers all

Box 1. Formulas of revealed comparative advantage and Lafay indices

Revealed comparative advantage index

$RCA^{EU}_{inEU;y}$ – revealed comparative advantage of intra EU exports of goods y in EU internal market:

$$RCA^{EU}_{inEU;y} = \frac{X^{EU}_{inEU;y} \,/\, X^{EU}_{inEU}}{X^{W}_{inEU;y} \,/\, X^{W}_{inEU}} \tag{1}$$

where:

$X^{EU}_{inEU;y}$ – EU exports to EU of goods y (intra-EU exports of goods y)

X^{EU}_{inEU} – Total EU exports to EU (total intra-EU exports)

$X^{W}_{inEU;y}$ – Worldwide exports of goods y to the EU (excl. intra-EU exports)

X^{W}_{inEU} – Total worldwide exports to the EU (excl. intra-EU exports)

but to ensure the comparability of data and the same source for all of them we assumed:

$X^{W}_{inEU;y} = M^{EU}_{exEU;y}$ – Total EU imports of goods y (total extra-EU imports of goods y)

$X^{W}_{inEU} = M^{EU}_{exEU}$ – Total EU imports (total extra-EU imports)

hence finally:

$$RCA^{EU}_{inEU;y} = \frac{X^{EU}_{inEU;y} \,/\, X^{EU}_{inEU}}{M^{EU}_{exEU;y} \,/\, M^{EU}_{exEU}} \tag{2}$$

Lafay index

$LFI^{i}_{inEU;y}$ – Lafay index for intra-EU trade of Member State i in product group y:

$$LFI^{i}_{inEU;y} = 100\left\{\frac{X^{i}_{inEU;y} - M^{i}_{inEU;y}}{X^{i}_{inEU;y} + M^{i}_{inEU;y}} - \frac{\sum_{y=1}^{n}(X^{i}_{inEU;y} - M^{i}_{inEU;y})}{\sum_{y=1}^{n}(X^{i}_{inEU;y} + M^{i}_{inEU;y})}\right\}\frac{(X^{i}_{inEU;y} + M^{i}_{inEU;y})}{\sum_{y=1}^{n}(X^{i}_{inEU;y} + M^{i}_{inEU;y})} \tag{3}$$

where:

$X^{i}_{inEU;y}$ – exports of Member State i to the EU internal market of product group y

$M^{i}_{inEU;y}$ – imports of Member State i from the EU internal market of product group y

Source: [Balassa 1965, Lafay 1992]

product groups in accordance with the SITC classification, whose share in the intra-EU trade in goods in 2013 amounted to: machinery and transport equipment (33.4%), other manufactured goods (26.2%), chemicals and related products (16.2%), food, drinks and tobacco (10.4%), mineral fuels, lubricants and related materials (8.8%), and raw materials (3.6%).

In 2013 France, Poland and Spain achieved a clearly increasing competitive advantage in the trade in agricultural and food products in the internal market, vis-à-vis countries outside the EU. Both the discussed indices of competitiveness assumed positive values in 2013 for Bulgaria, Belgium, Greece, and the Netherlands; however, at least one of them reported a decrease in relation to 2013. In machinery and transport equipment, the competitive position was maintained and even reinforced by new Member States (Poland, Romania, the Czech Republic, Slovakia, and Slovenia) but also by Italy and Austria. A high position, although the result for at least one index was deteriorating compared to 2004, was recorded for Germany, Hungary, Luxembourg, the United Kingdom, and the Netherlands. Both indices point to the poor and deteriorating performance of Ireland, Finland, and Belgium. In chemicals, Ireland, Belgium, Germany, Cyprus, and Malta recorded a clear competitive advantage. A considerably weaker but improving comparative position was attained by Bulgaria, Estonia, Latvia, Poland, Slovakia, and Finland. Considering other manufactured goods, exports in the internal market in the majority of the analysed countries can be considered competitive, vis-à-vis compared to third countries, although in almost all cases at least one index reflects a decreasing tendency (two decreasing factors were reported by: Bulgaria, Estonia, Greece, Latvia, Malta, Portugal, Romania, Slovenia, Finland). The only exception is Germany, for which the RCA and Lafay indices are above the threshold values. Interestingly enough, for states whose position in 2013 was not competitive, both indices reveal an increasing tendency (Ireland, Hungary, the Netherlands, and the United Kingdom). The exports of both raw materials and mineral fuels of individual Member States are a little competitive (except for Sweden and Lithuania, in almost all Member States at least one of the indices remains below the threshold value), which is mainly due to the fact that both product groups are imported from outside of the EU. Thus the result should not be assessed negatively understanding that EU specialisation needs to focus on offering highly processed goods. This means that, with the exception of Denmark and Estonia, each Member State has a comparative advantage in exports into the internal market vis-à-vis over countries outside the EU in at least one product group. However, at the same time many of them recorded a drop in their comparative advantage over the years 2004–2013 (other manufacturing goods: Bulgaria, Estonia, Greece, Latvia, Malta, Portugal, Romania, Slovenia, Finland; chemicals: United Kingdom; machinery and transport equipment: Luxembourg, Malta; agricultural products and food: the Netherlands) (Table 2).

In the case of services we conducted a comparative analysis of the competitive position of Member States in exports of selected groups of services into the EU in-

Table 2. RCA and Lafay indices in EU Member States in exports into the internal market vis-à-vis countries outside the EU in 2013 and their changes over the period 2004–2013

	Food, drinks and tobacco		Machinery and transport equipment		Chemicals and related products, n.e.s.		Mineral fuels, lubricants and related materials		Raw materials		Other manufactured goods	
	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI
EU-27	1.88	-0.02	1.30	0.02	1.73	-0.20	0.30	-0.21	0.80	-0.11	1.15	0.51
BE	1.92	0.77	0.79	-1.86	3.06	2.87	0.41	-3.70	0.71	-0.38	1.03	2.30
BG	2.57	1.29	0.82	-5.07	0.75	-4.15	0.20	-0.15	1.95	-0.69	1.87	8.77
CZ	0.87	-1.12	2.02	6.50	0.63	-3.85	0.13	-1.15	0.70	0.32	1.30	-0.69
DK	3.69	3.74	0.88	-5.59	1.42	-0.59	0.45	3.80	0.83	-0.14	1.08	-1.23
DE	1.39	-0.59	1.60	3.19	1.76	0.65	0.15	-2.65	0.58	-0.97	1.14	0.36
EE	1.61	-1.37	1.40	-1.84	0.60	-2.76	0.32	0.19	1.93	2.88	1.30	2.92
IE	2.72	-1.40	0.44	-4.87	5.92	16.85	0.04	-7.00	0.60	0.48	0.56	-4.06
EL	4.31	1.51	0.33	-4.94	1.55	-4.29	0.59	5.59	1.50	1.70	1.17	0.43
ES	3.13	3.24	1.27	-1.53	1.37	-3.13	0.21	1.19	0.90	0.11	1.10	0.12
FR	2.47	2.00	1.34	-0.07	2.00	1.47	0.14	-2.25	0.74	0.43	1.02	-1.57
IT	1.74	-1.60	1.24	1.73	1.53	-3.32	0.10	-1.05	0.38	-1.66	1.67	5.91
CY	3.27	-1.18	0.76	1.61	2.41	3.02	0.68	0.17	1.28	1.52	0.40	-5.13
LV	2.74	-0.84	0.78	-3.56	0.73	-2.67	0.33	-0.94	3.56	5.60	1.38	2.41
LT	2.74	-1.68	0.40	-10.72	1.59	-1.50	1.04	13.43	1.27	1.14	1.01	-0.68
LU	1.53	-1.70	1.21	3.17	1.07	-0.35	0.03	-7.62	0.64	-2.96	1.98	9.46
HU	1.59	1.09	2.03	3.55	1.06	-2.25	0.10	-1.00	0.76	0.39	0.98	-1.78
MT	0.33	-4.98	1.18	0.78	2.02	4.41	0.67	-4.68	0.14	-0.02	1.16	4.49
NL	2.36	0.26	1.02	0.18	1.65	-0.39	0.67	0.91	1.30	0.58	0.82	-1.55
AT	1.42	-0.07	1.49	1.46	1.26	-0.18	0.11	-2.00	0.78	-0.64	1.49	1.43
PL	2.28	1.46	1.37	-0.08	0.94	-4.55	0.17	1.22	0.63	-0.23	1.54	2.18
PT	1.84	-2.37	1.00	-0.69	1.03	-3.32	0.26	0.77	1.21	0.37	1.76	5.23
RO	1.19	-0.94	1.72	2.93	0.54	-5.17	0.08	-0.25	1.03	0.97	1.61	2.46
SI	0.93	-1.77	1.52	4.64	1.35	-1.33	0.22	-2.69	0.87	-0.67	1.41	1.83
SK	0.80	-1.45	2.05	3.70	0.53	-2.65	0.23	0.90	0.70	-0.13	1.21	-0.37
FI	0.43	-3.38	0.80	-7.54	0.86	-2.71	0.61	5.18	1.50	0.76	1.63	7.69
SE	1.27	-1.11	1.28	-3.48	1.18	-1.07	0.37	1.29	1.62	1.94	1.28	2.43
UK	1.36	-2.60	1.12	-4.29	1.98	0.94	0.68	6.40	0.50	-0.18	0.98	-0.28

	Transportation		Other business services		Communications services		Construction services		Computer and information services		Travel		Financial services		Insurance services	
	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI	RCA	LFI
EU-27	0.83		0.96		0.89		1.01		2.21		1.34		1.62		1.49	
BE	0.97	-0.16	1.30	-0.22	0.99	0.13	1.57	-1.19	1.75	1.35	0.93	-2.23	0.84	1.13	0.69	-1.03
BG	0.87	1.83	0.49	0.29	0.41	0.01	0.67	1.82	2.22	3.80	2.87	3.30	0.24	-0.05	2.11	2.61
CZ	0.96	0.46	1.05	-0.25	0.65	-0.05	1.38	0.37	2.36	0.86	1.82	0.50	0.04	-3.24	0.70	-2.19
DK	2.21	1.26	0.70	-1.36	0.36	-0.22	0.15	-5.04	1.42	-0.35	0.92	-1.66	0.29	2.41	0.58	23.84
DE	0.74	-1.02	1.09	-0.76	1.00	-0.07	2.07	-0.95	1.85	-0.82	0.99	-2.97	1.61	1.32	1.36	0.53
EE	1.52	2.85	0.73	2.33	1.21	0.18	0.00	0.88	1.36	2.66	1.49	3.45	0.47	3.58	0.06	6.17
IE	0.33	2.54	0.64	-6.26	0.18	-0.69	0.00	0.00	11.87	0.00		0.00	2.02	0.00	7.06	0.00
EL	1.54	13.62	0.27	2.72	0.63	0.63	1.18	0.00	0.48	0.00	2.73	0.00	0.17	0.00	1.29	0.00
ES	0.00	1.73														
FR	0.72	0.26	1.16	1.59	1.07	0.24	0.42	-1.52	0.97	0.03	1.73	3.50	0.76	3.44	1.65	9.08
IT	0.48	-1.61	0.90	-0.33	1.49	0.12	0.15	2.58	1.03	-1.32	2.42	1.65	1.25	-1.65	1.54	-0.51
CY	1.41	23.92	0.59	13.65	0.16	0.28	0.29	7.98	0.16	7.24	2.40	10.02	0.93	12.89	0.28	3.61
LV	2.05	5.70	0.57	2.03	1.09	0.33	3.69	1.70	1.53	2.52	1.23	0.81	0.01	4.33	0.03	-1.11
LT	2.63	4.04	0.49	0.94	0.48	-0.05	1.78	0.51	0.55	0.72	1.02	0.72	0.15	0.64	0.00	-2.84
LU	0.19	1.86	0.76	18.65	0.79	2.17	0.22	-9.25	0.86	4.73	0.48	7.58	10.38	15.64	3.17	12.71
HU	1.28	0.45	0.95	-1.13	0.38	-0.08	1.57	1.07	1.73	0.58	1.38	2.26	0.22	-1.17	0.11	-4.55
MT	0.37	7.69	0.26	-4.69	0.18	0.29	0.00	0.00	0.53	0.00	1.62	0.00	0.57	0.00	0.76	0.00
NL	0.99	-0.04	0.85	-2.36	1.04	-0.20	1.10	-1.77	1.27	-1.90	0.77	-2.63	0.17	-3.04	0.28	-2.16
AT	1.09	0.89	0.92	2.51	0.65	0.17	0.83	0.17	1.69	1.70	1.91	3.62	0.30	2.22	1.29	1.76
PL	1.43	2.09	1.00	1.01	0.43	-0.03	2.67	1.84	1.75	0.73	1.33	0.17	0.34	-0.25	0.26	-3.67
PT	1.14	2.09	0.45	1.01	0.71	-0.03	2.02	1.84	0.67	0.73	2.67	0.17	0.26	-0.25	0.32	-3.67
RO	1.80	5.40	0.90	1.51	1.49	0.53	2.75	4.33	2.84	3.78	0.51	0.45	0.50	0.56	0.58	-1.55
SI	1.24	1.91	0.51	0.33	1.61	0.27	4.21	0.39	0.53	-0.48	2.35	2.16	0.09	-0.30	0.64	-0.48
SK	1.01	-0.35	0.80	0.59	0.90	0.07	3.38	-0.46	2.10	0.62	1.92	-0.02	0.15	-1.43	0.44	-1.80
FI	0.61	-1.42	1.06	0.34	0.52	-0.17	1.68	1.14	5.28	2.40	0.57	-3.56	0.14	-7.88	0.00	-9.25
SE	0.83	1.11	1.51	3.66	1.00	-0.02	0.66		2.07	1.91	0.78	-5.72	0.56	5.47	0.45	3.58
UK	0.56		1.04		1.46		0.43		2.03		0.98		3.88		0.75	

Notes:

0.01	positive index (RCA>1; LFI>0) increasing in 2004–2013
0.01	positive index (RCA>1; LFI>0) decreasing in 2004–2013
0.01	negative index (RCA<1; LFI<0) increasing in 2004–2013
0.01	negative index (RCA<1; LFI<0) decreasing in 2004–2013

Source: Own calculations, Eurostat.

ternal market, vis-à-vis third countries, also based on the changes in the RCA and Lafay indices. The survey covered services for which intra-EU trade recorded a relatively high share in 2013 or which potentially may be more closely linked with the manufacturing industry: transportation (18.6%), other business services (27.3%), computers and information services (8.6%), financial services (7.1%), communication (2.9%) and construction (1.5%).

For transportation services, often inseparably linked with industrial production, a high competitive position index in comparison to the position of third countries was recorded for exports into the internal market from new Member States, but also from Denmark and Portugal. It is also worth noting that the ranking of many of these states (for at least one index) deteriorated (that is, for Cyprus, Lithuania, Latvia, Poland, Slovenia, but also Luxembourg, Austria and Portugal). The competitive position in exports of other business services into the EU market improved for France, Poland and Sweden while the absence of a comparative advantage (at least one of the indices below the threshold value) was characteristic of almost all exports in the remaining states. However, what deserves most attention is the fact that for most of them we can observe an upward tendency in their competitive positions, meaning the reduction of extra-EU services in favour of intra-EU trade. In the exports of transportation services in the internal market, the leaders in competitive positions vis-à-vis countries outside the EU were Estonia, Italy and Slovenia, but also Latvia and Romania, which reported a drop in both indices in the period 2004–2013. As for construction services, the Czech Republic and Romania maintained and improved their comparative advantage in the internal market. Also a good competitive position was recorded for Poland, Portugal, Hungary, Lithuania, Latvia and Slovenia, although in their case at least one index revealed a decreasing tendency over the analysed period. Special attention should be paid to exports of digital services such as computer and information services. An upward trend in the competitive position in sales into the internal market was recorded for countries like: Bulgaria, the Czech Republic, Estonia, Latvia, Austria, Poland, Romania, Slovakia, and Finland. The worst competitive position for intra-EU sales was reported for Lithuania, Luxembourg, Portugal, and Slovenia. In both financial and insurance services, due to their specificity, only individual countries recorded a comparative advantage in trade in the internal market (respectively: Germany and France, Austria and Luxembourg). Incomplete data made it impossible to include the position of the United Kingdom in the trade in services; however, based on just one index we can conclude that it was competitive in all services but transportation. Thus, the analysis of the trade in services in the EU internal market demonstrated that almost all countries achieved a strong and increasing competitive advantage, vis-à-vis compared to third countries in trade in a given category of services (Transportation: Denmark, Hungary, Romania; Other business services: France, Sweden; Construction: the Czech Republic; Communication: Estonia, Italy, Slovenia; Computer and

information services: Bulgaria, the Czech Republic, Estonia, Austria, Poland; Romania, Slovakia, Finland; Financial services: Germany; Insurance services: France, Luxembourg; Travel: Latvia, Austria). Exceptions to the rule are: Belgium, Ireland, Greece, Cyprus, Lithuania, Malta, the Netherlands, and Portugal, whose comparative position started to deteriorate.

Conclusions

The above survey allows us to draw the following conclusions:

- the EU internal market remains a relevant outlet for goods sold in intra-EU trade compared to extra-EU exports, although its share in global EU trade was decreasing over the period covered by our analysis: 2000–2013;
- the extra-EU exports dynamics both for goods and services is increasing much more rapidly than for intra-EU sales, which means more extensive links of the EU economy with the world;
- the dynamics of intra-EU exports of services increases more quickly than the sales of goods mainly in the EU-15, which may confirm the servitization phenomenon and a global tendency of more developed countries to specialise in the trade in services at the cost of a slower increase in the intra-EU trade in goods (in countries which joined the EU in 2004, the increase in exports of goods into the EU market is accompanied by a more or less similar increase in the sales of services to other Member States);
- the intra-EU trade in services experienced to a lesser degree (or even insignificantly) the economic crisis in 2008–2010 compared to the sales of goods in the EU internal market;
- at present, each Member State enjoys a comparative advantage vis-à-vis compared to third countries in their exports of some product group into the internal market, which, however, in many cases is gradually decreasing;
- in the intra-EU exports of services, twenty out of twenty eight Member States achieved an increasing competitive position vis-à-vis global exports; the competitive position of the rest of Member States in the trade in services is gradually improving.

The above conclusions demonstrate that the exports of services into the internal market are less important for the EU GDP than the exports of goods but, because of their high upward dynamics, we may expect their bigger impact upon the EU economy (mostly the Member States of EU-15). It is hard to conclude, however, that the increase in the role of the trade in services takes place at the cost of the trade in goods because extra-EU exports of goods clearly increase. This means goods manufactured in the Member States are still in demand, but they are either exported as goods only outside of the EU or, within servitization, offered in the in-

ternal market together with services. Considering the fact that practically each and every Member State has a comparative advantage in intra-EU exports in at least one group of products or services, the EU internal market should be treated as an integrated product market rather than a segmented market of goods and services.

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