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Foreign Trade of SME-s in Poland in the European Integration Process

Abstract

The aim of the paper is to analyse and evaluate the foreign trade of small and medium-sized enterprises (SMEs) in Poland against the backdrop of deepening and widening of the European integration process. Such firms are exposed to strong competitive pressures, when barriers to goods, services and capital movements disappear within the integrated area. SMEs in the new Member States will probably adjust their export strategies. A common policy towards SMEs and national policies strengthen competitive advantages of domestic firms.

Introduction

The European integration provides firms in the Candidate Countries with access to the Single Market where customs duties and quotas have been abolished (as a result of implementation of the free trade area of industrial goods). Firms meeting European quality, environmental (veterinary and sanitary in the case of agricultural goods and foods) and product safety standards will be granted a free access to the Single European Market with approximately 420 million consumers (15 "old" Member States + the 10 "new" ones). The non-compliant firms will not be allowed, like today, to supply their products to the Member States, but only to sell them in the domestic market.

Acceptance of the Community system of external customs tariffs (generally lower than the present level of protection in the Candidate Countries) by the new Member States will mean that their firms importing ready-made products from the third countries will generally face a stronger competition, whereas those that import intermediary goods from that area will improve their competitive position by being able to reduce the units costs of their products. The issue of competitive position especially concerns competitors in these third countries that have been granted by the EU a relatively high degree of preferential access to its market (*the European Economic Area* and *the Mediterranean Economic Area* countries, some Latin America and Asian countries that can access the EU market under the Generalised System of Preferences).

Growing competition is expected to generate pressures on reducing firms' costs, which will contribute to their increased competitiveness in the Single Market, and to provide profitable and competitive organisations with export opportunities in other Member States and in markets of the third countries, but enterprises unable to take up the challenge will drop out from the market. More technology – based firms, with higher utilisation of human capital and a higher product and process innovativeness, will enjoy a special opportunity to grow and expand in the Single Market by establishing co-operative relations. Under EU programmes, and especially component 6 of the Framework Research Programme for Technology Development and Presentation, as well as other EU assistance programmes, enterprises will be entitled to use grants to subsidise their product and process innovations. This will allow them also to establish and participate in co-operative networks with the EU and CEE firms and will be supportive of growth and intra-firm trade.

According to EU rules firms in the new Member States will be offered the opportunity to use public assistance in the below areas: regional purposes, horizontal purposes, and sectors of economy (manufacturing industry, services and rural areas). This assistance can be broken down into the following main subjects: research and development (R+D), environmental protection, SMEs, worker training, restructuring and turning around firms going through hardships, employment and worker retraining funds, assistance to enterprise restructuring and to degrading urban areas. These measures are to accelerate restructuring of enterprises operating in the "problem" branches of industry such as mining, steelworks, man-made fibres, shipbuilding, automotive, as well as contribute to restructuring of fishery and rural areas.

An assessment of the micro economic effects of European integration on the SME sector is predominantly concentrated on investigating how particular stages in that process affect firms' behaviours and on the strength of their responses to the shrinking coverage of national laws and emergence of new areas of Community – wide regulations, such as the level of protection given to the integrated market, rules that differentiate the access of companies in the third countries to the Internal Market, technological, environmental, quality, veterinary, sanitary and product safety standards and rules permitting goods in the Single Market, rules of competition, including equal opportunities for tapping into financial resources and funds earmarked to support firms' operations (particularly investments of the small and medium-sized enterprises). A special role is given to investments important for the whole Community, such as environmental investments or projects serving development of science and research, conducive to higher innovativeness of firms and economy of the whole Community.

The micro economic effects can be observed at every stage of the integration processes, e.g. the establishment of a free trade area and customs union, the Single Market and during implementation of the economic and monetary union.

The theory of integration lists both internal and external integration benefits enjoyed by businesses in the Member States. The external ones are: (1) growing enterprise size and expansion opportunities leading to a stronger position in negotiations, easier and more favourable access to capital, a more efficient use of the labour force, better opportunities of attracting funds to innovations and improved position in the domestic and foreign markets; (2) possibilities of achieving results through a steady, practical learning how to produce more efficiently larger numbers of more competitive products (so-called learning by doing – Molle 1995).

For firms operating in the integrated area the external benefits result from the diffusion of economic results. When a firm gets a better market position due to the customs union, then its suppliers and customers benefit from the positive effects as well, which stimulates them to introduce technological and product innovations. The integrated market accelerates also exchange of technological *know-how* between firms.

The removal of administrative, technical and fiscal barriers is characteristic of the next stage of integration, i.e. the Single Market. It makes firms operating in the Member States adjust their behaviours. The process of building the Single Market triggers macro and micro feedbacks in economy that, allowing to cumulate benefits, produce also social and economic costs.

The micro economic effects generated by the Single Market are represented by lower operational costs of enterprises, as assumed by the programme of building the Single Internal Market (non-Europe cost reduction). As a result multifaceted, interrelated adjustments in the operation of enterprises are set off.

Firstly, lower costs in a competitive environment lead to lower prices. When the price flexibility of demand is adequate, both domestic and international demands for goods offered by enterprises expand and the volume of goods and services they produce goes up. Such processes contribute to cost reductions that help utilise the comparative advantages. The economies of scale and learning at the micro level come into play. As a result, the margin of profit is growing.

Secondly, competitive pressures activate restructuring processes in enterprises, that take the form of intense intra- and inter-industry adjustments. This situation necessitates innovation and technological progress at the enterprise level.

1. The condition and structure of the SME sector in the CEE countries

SMEs play crucial role in the Candidate Countries. Enlargement will be a very important political and economic event in Europe in the coming years. In the 'Observatory' published by the European Commission estimates of the number of enterprises and employment by industry and size-class were made for all 13 Candidate Countries (EC 2002, p. 6). It is estimated that in these 13 countries almost 6 million enterprises are active, providing employment to almost 30 million people. As in Europe – 19, most of these enterprises are micro-sized. The size-class structure of employment is on average slightly more geared towards small enterprises: SMEs make up 72% of total employment in the Candidate Countries, while the corresponding figure is 66 % for Europe – 19. This difference is concentrated in micro enterprises, as they provide. In the Observatory project two telephonic surveys were held among almost 8,000 SMEs in all 19 countries and all sectors: the so -called ENSR Survey. Results of the surveys are included in the Observatory reports 'Highlights from the 2001 Survey' and 'Highlights from the 2002 Survey'. According to data from the European Commission SMEs were also involved in the 5FP (Framework Programme). The share of enterprises in the total number of institutions participating in this Programme is estimated at 40%.

Poland, Czech Republic; Slovakia and Hungary have made a substantial progress in strengthening the institutional and administrative framework to support the SMEs sector. (EC 2002).

1.1. The performance and structure of SMEs in Poland

As of the end of 2001 almost 3.4 million enterprises were registered in Poland, of which 99.8% were SMEs. According to estimates, about 1.8 million of enterprises out of their total number are in fact economically active. Compared with 1990 the number of SMEs increased by almost 330%.

The largest increment of new businesses took place among the smallest enterprises (and in that group in enterprises employing to 5 persons); the group of the medium-sized enterprises grew the least. In the years 1993–2000 the share of the SME sector in turnover from sales of products, goods and materials was steadily ascending in the whole economy. In 1993 it was 40%, in 1998 over 51%, and in 2000 64 %. An average size of a Polish enterprise is smaller than in the EU, being 3.3 persons.

Today the SME sector employs about 66.4% of total labour in the national economy (excepting agriculture, forestry and fisheries). This sector generates approximately 50% of GDP, whereas in the EU, where the scale of employment is only slightly higher – as much as two thirds. Small-sized enterprises are the main sources of GDP – in 2000 they contributed 40% of GDP, while the medium-sized – 10%.

1.2. Innovativeness of Polish enterprises

The indicator showing the share of industrial innovative firms in the population of the researched organisations dropped from 37.6% in the period 1994–1996 to 28.9% in the years 1997–1998, being only 16.9% in the period 1998–2000. For the sake of illustration, the average EU value of the indicator is ca 51% and characterised by a considerable spread: from 26% in Portugal to 74% in Ireland. The indicator of innovativeness observed in the period 1998–2000 shows (allowing for firm's size) that the least innovative were small-sized enterprises (10–49 workers), where the indicator was estimated at only 10.7%. For the medium-sized (50–249 workers) and large-sized enterprises (more than 249 employees) the indicator was 23.2% and 54.2%, respectively. Even though data available for the period 1994–1996 related to slightly different size classes of enterprises, yet it confirmed that the indicator of innovativeness grew with enterprise size (20–50 workers – 16%, 50–249 – 26%; 250 plus – 61%) and that innovativeness dropped the lowest in the smallest enterprises. As in the Member States, the market service sector in Poland is considerably less inclined to introduce innovations than the industrial sector. In the years 1997–1999 the share of innovative enterprises in that sector in Poland was 16%, whereas in the Member States in the period 1994–1996 such enterprises made up 41% on average. Such a low indicator of innovativeness in the market service sector in Poland is largely due to the sector's structure by type of business and a significant representation of wholesalers and commission houses (68% in 1999) that show an extremely low level of innovativeness (14.2% of innovative enterprises in the years 1997–1999). An alarming phenomenon is the declining proportion of enterprises planning to introduce innovations, from 40% in the years 1994–1996 to 21.4% in 1998–2000. Among the small-sized enterprises that rate dropped from 20% to 15.9%, respectively. In contrast, in the group of the medium-sized enterprises it went down from 35% to 26.7%, respectively. Such a situation may make the competitiveness of Polish products even worse and the structure of industry more unfavourable. Also the total number of the Polish enterprises participating in the 5FP was not high and it amounted to only ca.100 in the year 2001. (data of Ministry of Economy).

In the recent period the share of new and modernised products in production sold of industry (in current prices) declined as well. The proportion of products launched in the years 1997–1999 in sales was 21.3% in 1999, but in 2000 it dropped to 16.4% for products started in the period 1998–2000. Also the percentage of high-tech start-ups is disconcertingly low. If continued, this tendency may seriously hurt the competitive position of enterprises, especially the small- and medium-sized. The year 2000 was the first year for a long time when outlays on innovations in the manufacturing industry declined in absolute terms. Compared with 1999, they dropped from 15.2 bn PLN to 12.2 bn PLN, which makes up almost a 20% fall. This highly unfavourable trend gives rise to doubts, whether enterprises will be able to compete in the European Single Market.

The positive tendency that occurred in this field of the Polish economy is connected with the creation of networks of cooperation and clusters such as: *"Plastic Valley"* in Tarnów (polymers production), automobile industry cluster in Warsaw.

1.3. SMEs' export – financial results of SMEs exporting to the Member States – comparative aspects

Among the exporting SMEs the largest subgroup was enterprises exporting mainly (over 50% of exports) to the Community[1] This subgroup made up 37.6% in the total number of exporting SMEs and the rate shows an upward trend. Among 5,317 small and medium-sized enterprises with prevailing EU exports 70.3% represented manufacturing, 17.7% – trade, 3.6% – business services, 3.2% – building, and 1.9% – transport and telecommunications. Within manufacturing most exporting SMEs that targeted the EU operated in the following sections production of:

- metal products (548 firms),
- machinery and equipment (430),

[1] On the basis of the Ministry's of Economy materials, www.mg.gov.pl

- wood and wooden products (411),
- clothing (369)
- furniture (321).

A comparison of financial results of exporting SMEs by major destination of their exports (table 1) shows that in all three examined periods enterprises exporting primarily to the Member States had the worst results. The best situation characterised organisations exporting chiefly to the CEE countries (first half of 2001), and enterprises that in the first place sold their products to other countries (years 1999–2000).

Table 1. Rate of gross profitability of turnover in the subgroup of SMEs exporting mainly to the Community (EU), the CEE countries (CEE) and other countries of the world, respectively, in the years 1999–2000 and first half of 2001 (%)

Specification	1999	2000	1st half of 2001
SMEs:			
Total SMEs	3.7	3.2	2.5
SMEs – EU	3.7	2.9	1.9
SMEs – CEE	4.0	3.9	4.4
SMEs – other countries	4.3	4.4	2.5
SMEs – section industrial manufacturing:			
Total SMEs	4.5	3.7	2.8
SMEs – EU	4.3	2.7	1.5
SMEs – CEE	5.3	5.0	5.0
SMEs – other countries	4.8	4.6	3.1
SMEs – section trade			
Total SMEs	2.6	2.7	2.4
SMEs – EU	2.4	2.6	2.1
SMEs – CEE	3.0	3.2	3.9
SMEs – other countries	3.2	3.3	2.2

Source: Ministry of Economy data, www.mg.gov.pl

Regarding manufacturing the picture was even more obvious. In all three periods enterprises specialising in EU exports showed the lowest profitability and those focused on CEE exports – the highest .

Also in the case of SMEs operating in the section G (trade), the second important for export, between 1999 and 2000 and in the first half of 2001, the worst financial results showed enterprises exporting mainly to the Member States. However, the rates of gross profitability of turnover between this group of enterprises and organisations exporting to the CEE countries and third countries were not so much different as in section D.

In the period in question the financial position of SMEs exporting mainly to the EU clearly deteriorated compared with those focused mainly on the CEE countries. If the gross profitability of turnover in the first subgroup declined from 3.7% in 1999 to 2.9% in 2000 and 1.9% in the first half of 2001, for the second subgroup the same rate was 4.0%, 3.9% and 4.4%, respectively. However, in the first and second analysed periods the position of SMEs specialised in EU exports did not change in relation to SMEs exporting mainly to other countries. In both cases the gross profitability of turnover in the second subgroup was 0.6 percentage point above the rate's value for enterprises exporting to the EU.

The relatively worse financial position of SMEs exporting mainly to the Member States is even clearer in respect of manufacturing. In 1999 the gross profitability of turnover in this subgroup of firms in section D was 4.3%, among firms focused on CEE exports 5.3%, and for firms specialising in exports to other countries 4.8%, but in the first half of 2001 the values were 1.5%, 5% and 3.1%, respectively. In that last period the rate of gross profitability in firms exporting mainly to the Member States was almost twice as low as for all SMEs – exporters in section D – and over three times as low as among firms exporting to the CEE countries.

The weak and souring financial condition of SMEs exporting mainly to the Community seems to corroborate the conclusion that the real appreciation of zloty/euro exchange rate has had an unfavourable effect on the profitability of exports to the Community in the recent period. This concerns not only the year 2000 and the first half of 2001, but probably the second half of 2001 as well. In that period of time the nominal euro/zloty exchange rate went down 6.1% compared with the second half of 2000, even though it somewhat appreciated (2%) compared with the first half of 2001.

Table 2. Labour costs as proportion of total earnings in SME subgroups exporting mainly to the Community (EU), the CEE countries (CEE) and other countries of the world, respectively, in the years 1999–2000 and the first half of 2001 (%)

Specification	1999	2000	1st half of 2001
SMEs:			
Total SMEs	10.2	9.8	11.2
SMEs – EU	11.2	10.3	12.3
SMEs – CEE	7.9	7.9	8.8
SMEs – other countries	11.0	9.0	10.1
MSP – section industrial manufacturing:			
Total SMEs	14.6	14.6	15.2
SMEs – EU	17.1	16.8	16.9
SMEs – CEE	11.9	11.6	12.2
SMEs – other countries	15.4	12.4	14.5

Source: see table 1.

In all three periods in question, firms exporting mainly to the Member States showed the highest participation of labour costs in total earnings and organisations focused on the CEE export – the smallest, both in general terms and in section D (see table 2). This may evidence that the small- and medium-sized enterprises exported the relatively most labour intensive products to the EU and the least labour intensive to the CEE countries.

A comparison of Polish, Czech, Slovak and Hungarian enterprises shows that in 2000 the share of technology-intensive products in the export to the EU was the highest in Hungary (39%), then Poland (28%), Czech Republic (23%), and in Slovakia it was the lowest, within 6% (Wysokinska 2003).

In late 1990s the financial position of SMEs with predominantly EU exports clearly deteriorated compared with those focused on the CEE countries. The process of relatively souring financial position of SMEs exporting to the EU was even more distinct in manufacturing. At that time, the indicator of gross profitability for enterprises exporting mainly to the Member States was almost twice as low as that characterising all exporting small- and medium- sized manufacturers and over three times as high as for firms with the CEE exports. The highest proportion of labour costs in total earnings could be found among enterprises exporting to the Community, which proves that the share of labour intensive exports destined to the Single Market continues to be high.

This adversely affects prospects of future export to the EU, when high labour costs are persisting (Ministry of Economy, www.mg.gov.pl).

An export-based assessment of SMEs' internationalisation shows that SMEs operate mainly in local markets. Only about 14 thousand firms are involved in exports (0.7%.of the total number of Polish SMEs). At the same time, an increase in their activities in foreign markets has been noted in recent years. Export of goods in the SMEs sector in 1993–2000 increased over USD 3 billion, up to about USD 14.6 billion, and import from USD 6.7 billion to over USD 30 billion. The highest level of turnover was achieved in markets of the developed countries. Despite positive results the share of the SMEs sector in total export decreased from 47.7% in 1999 to 46.1% in 2000, and regarding import it decreased from 65.4% to about 61.3% over the same period. The drop of the sector's share in total export was mainly caused by increased exports of large enterprises. (Report by the Ministry of Economy, Labour and Social Policy in Poland , 2002).

Main barriers to the access of export to the European Internal Market of SMEs in the CEE countries[2] :

Demand-related:

- Insufficient amount of start-up capital: Poland – 57.3%, Czech Republic – 71.9%, Hungary: 32.7%
- Strong market competition: Poland 79.0%; Czech Republic: 53.2%; Hungary: 59.9%
- Underdeveloped management of marketing: Poland 21.7%, Czech Republic: 25.3%, Hungary 5.5%

Supply-related:

- Technological: Poland – 7.6%; Czech Republic – 5.3%; Hungary – 5.6%
- Scarcity of financial sources: Poland: 71.7%; Czech Republic: 69.1; Hungary: 78.5%
- Limited availability of loans: Poland – 33.3%; Czech Republic – 27.4%; Hungary – 16.8%
- Limited availability of well-skilled staff: Poland – 10.8%; Czech Republic – 11.8%; Hungary – 7.0%.

Quality and environmental norms and standards as barriers to the adjustment of SMEs exports to the European Internal Market are also important. In Poland the number of ISO certificates is still relatively low

[2] Based on : Enterprises created in five countries of first pre-accession group: GUS, Warsaw, 2001.

compared with the EU Member States. For the total number of 3.4 million registered companies only 2,854 have been awarded ISO 9000 or ISO 14000 certificates, whereas in Germany there are 45,000 companies that hold such certificates, and the UK has 70,000 companies with ISO certificates (as of the end of 2001).

Among Polish companies holding ISO 9000 or ISO 14000 certificates 6.8% are small firms and 14.1% are medium-sized. Respectively, 8.2% and 6.1% of those companies are planning to apply for the certificates. It is worth noting that in Poland emphasis is placed on ISO 9000 certificate relating to product quality, disregarding the value of environment management certificates. Enterprises make much less effort to introduce integrated management systems, i.e. management of quality, environment and work safety. (Strategic Operational Program: *Increasing Competitiveness of the Polish Economy in 2002–2006*, Ministry of Economy, Warsaw, 2002)

During the period of 1995–2000, the number of ISO standards in Poland increased from 130 to 2,075, but in the same period Czech entrepreneurs were granted 3,855 ISO 9000 certificates and in Hungary – 4672 (Moszkowicz 2002; Żylicz 2003).

The reduced share of resource- and material-intensive goods in relation to overall exports was also connected with the application of international and EU environmental norms and standards to such products. For example, the share of goods classified as posing "environmental hazards" in Poland's overall export fell from 50% in 1992 to 44% in 1999, in the Czech Republic from 52% to 48% and in Hungary from 32% to 25%, as a result of increasing compliance with EU standards. (Wysokińska 2001).

Financial results of the above firms give rise to fears, whether the majority of firms, especially the small and medium-sized, will be able to stand up to competition in the Single Market. After Poland has joined the EU customs zone, some firms, mainly those threatened by imports of products from the third countries, will have to be more dedicated to restructuring in order to match the building up competition. Those that import their components from the third countries will be able to pay more competitive prices, thus improving their price competitiveness. In the process of gearing up for competition in the Single Market, enterprises should make another significant restructuring effort to reduce costs of production and to upgrade it, as well as adjust themselves to EU and international norms and standards (ISO). Macro economic research shows that although the number of 139 ISO 9000 certificates issued in Poland in 1995 grew to 2,075 in 2000, in the same year the Czechs held 3,855 certificates and the Hungarians – 4,672 (Moszkowicz 2002). Polish firms meeting European standards will be able to expand their sales in the Member States and to keep their slice of the domestic market that will become part of the Single European Market. This will allow them to enlarge their volumes of production and to reduce unit costs even more. Those organisations that will fall short of the requirements will run the risk of liquidation. Polish enterprises should also focus their actions and efforts on seeking market niches and establishing co-operation with EU firms as suppliers and co-operating organisations, which might enhance development of the intra-industry trade.

2. Recommendations for SME policies in the CEE countries

In reference to the governmental economic strategy and the plan of anti-crisis activities, a programme named "Capital for the Entrepreneurial" was developed in Poland for the years 2002–2006, aiming to expand the systems of loan funds and loan guarantees and addressing small- and medium-sized enterprises' needs. The programme was approved by the Council of Ministers on 13 August 2002. Its major goal is making it easier for entrepreneurs to access external sources of finance for their businesses.

Governmental SME policy to be implemented until 2006[3] combines new initiatives launched in 2002 and the best practices derived from previous programmes enhanced by necessary instruments that are the most suitable to the present condition of the small and medium-sized enterprises (MGPiPS 2003). The policy is underpinned by the following assumptions:

- programme activities have a horizontal focus, which means that they are addressed to all small and medium-sized enterprises, irrespective of where business is conducted, its legal form or type,
- the activities will tend to ensure equal opportunities and to popularise entrepreneurship, especially among youth, graduates, unemployed and disabled persons,
- business-related institutions will be supported, but only those meeting specific standards and backed up by their local communities,
- activities will be funded by the national budget, the PHARE aid funds and structural funds that will become available following Poland's accession to the European Union, and by international bank loans, as well as funds of private businessmen,

[3] Directions of the Government's Activities Towards Small and Medium-Sized Enterprises from 2003 to 2006, MGPiPS, Warsaw, document accepted by the Council of Ministers on 4 February

- assistance to a single entrepreneur may not exceed 100,000 EUR over the period of three successive years, regardless of its form and purpose,
- activities will be implemented in line with directions laid down in the *European Chart of Small-Sized Enterprises* accepted by Poland in April 2002.

Beside the horizontal activities addressing small and medium-sized enterprises and launched in connection with the said document, also regional actions are scheduled for implementation, with the scale and choice of the offered instruments being dependent on the socio-economic structure of individual regions and their development-related policies.

Even though the quantitative indicators characterising Polish small and medium-sized enterprises are similar to those in the Community, yet Polish enterprises are comparatively understaffed and undercapitalised, with less efficient technologies. Therefore, for assistance to this sector to be effective, specific instruments addressing exclusively SMEs should be applied, beside macro economic policy tools, that will serve:

- improved management and a better use of human resources and capital,
- SMEs' inclusion in the international co-operation network and establishment of their contacts with foreign trading partners,
- establishment of co-operative contacts with large companies,
- organisational, technical and technological development through investment projects,
- encouraging entrepreneurs to form groups of producers, distributors and to establish co-operation and subcontracting networks,
- development of commercial and franchising networks,
- improved competitiveness through implementation of new technologies and development of human resources.

The need to unleash activity and entrepreneurship results also from the souring labour market and unemployment building up in the recent period, which marginalises considerable part of the society. Consequently, activities being undertaken by the Polish Government in support of the small and medium-sized enterprises will attempt to spur their economic activity to ensure higher levels of employment, to increase their competitiveness and the capability of functioning in the Single European Market.

Poland, respecting the national treatment rule, offers equal development conditions to domestic and foreign SMEs. All programmes, measures and instruments made available to domestic companies are also open to foreign investors.

A similar policy favourable to SMEs' development is followed by other CEE countries as well.

Conclusions

1. The level of internationalisation of SMEs in Poland is relatively low, they operate mainly in the local market.
2. They export goods first of all to developed market economies with special reference to the EU. The structure of their export to the EU is mainly labour intensive.
3. Main barriers in their export to the EU are ecological and technical norms and standards and the access to capital and preferential credits.

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