



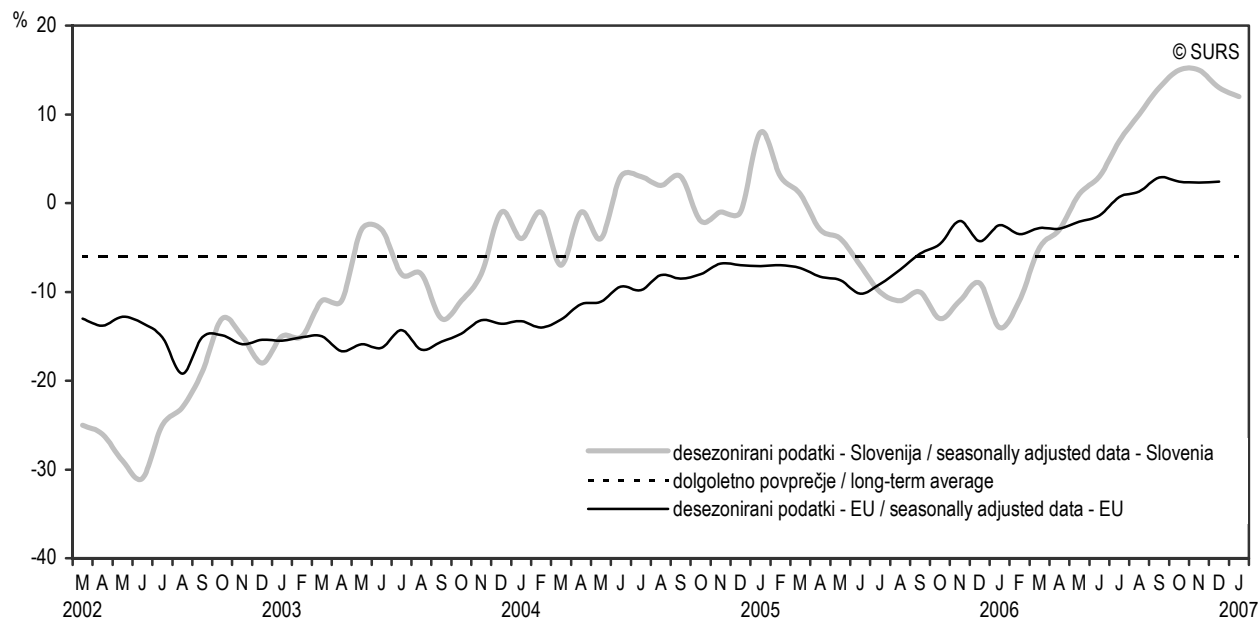
POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, JANUAR 2007

BUSINESS TENDENCY IN CONSTRUCTION, SLOVENIA, JANUARY 2007

- Direktorji so poslovne tendence v gradbeništvu ocenili januarja 2007 slabše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 1 odstotno točko nižja kot pretekli mesec. V primerjavi z lanskim januarjem je bila višja za 25 odstotnih točk in za 8 odstotnih točk je bila višja od povprečja lanskega leta.
- V tem mesecu posebej izstopajo še kazalniki pričakovano zaposlovanje, pričakovane cene in število mesecev zagotovljenega dela; tokrat so namreč dosegli najvišje vrednosti v celotnem opazovanem obdobju.
- Kazalniki stanj so se v primerjavi s preteklim mesecem večinoma izboljšali; izjeme so le kazalniki zaposlovanje, cene in poslovno stanje. Pričakovanja za naslednje tri mesece so ugodna.
- In January 2007, managers estimated business tendencies in construction as being worse than in the previous month. The seasonally adjusted value of the confidence indicator fell by 1 percentage point compared to the previous month. Compared to January 2006 it was up by 25 percentage points and it was 8 percentage points above last year's average.
- In January the expected employment, expected prices and assured work indicators reached the highest values in the whole observed period.
- Compared to the previous month, the observed indicators for the appreciation of the situation mostly improved, except for employment, prices and business situation. The expectations for the next three months are favourable.

1. KAZALNIK ZAUPANJA V GRADBENIŠTVU¹⁾ V SLOVENIJI IN EU²⁾, MAREC 2002–JANUAR 2007

CONSTRUCTION CONFIDENCE INDICATOR¹⁾ IN SLOVENIA AND EU²⁾, MARCH 2002–JANUARY 2007



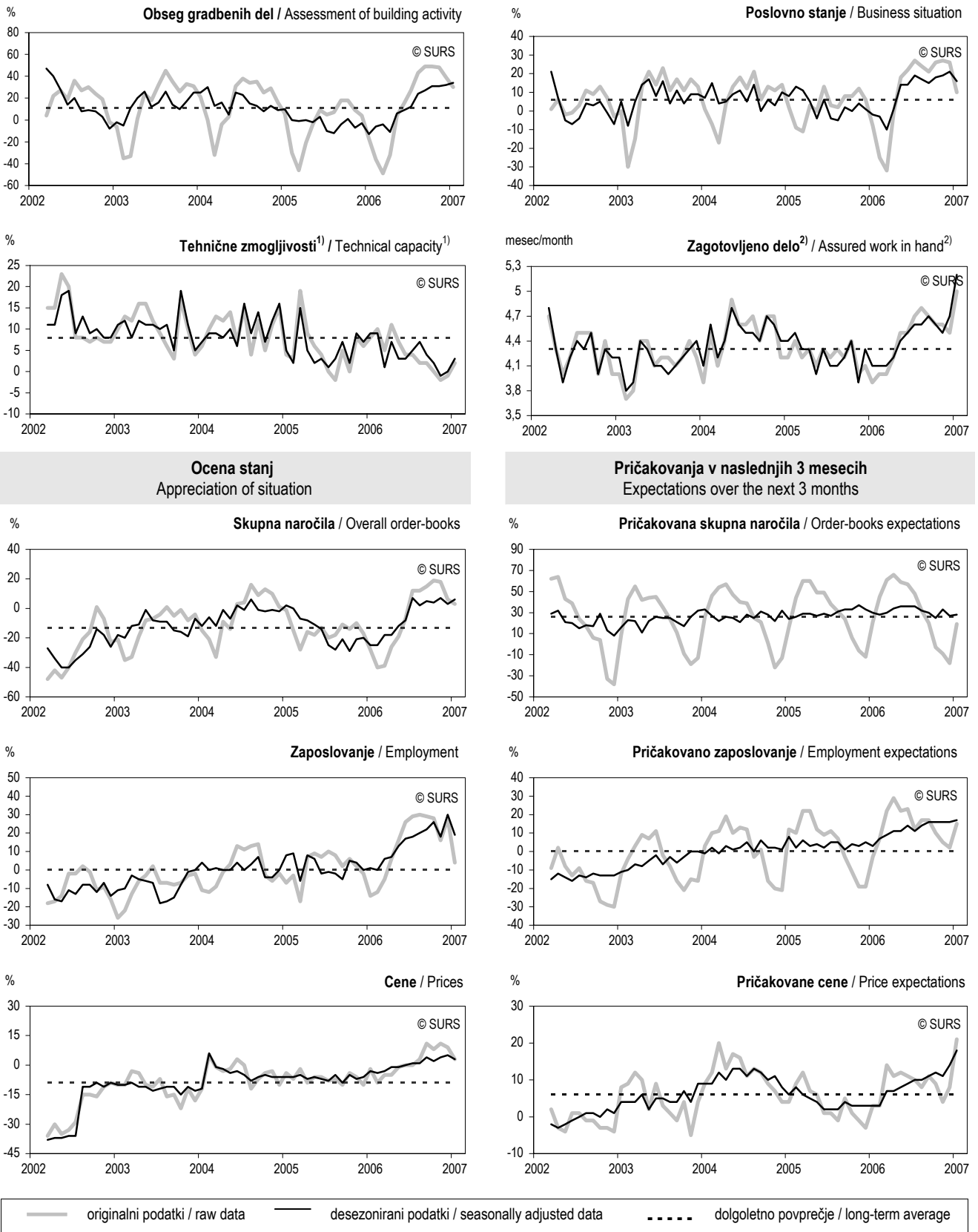
1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanji o sedanjih skupnih naročilih in pričakovanem zaposlovanju. Podatki so desezonirani.

The confidence indicator is an average of responses (balances) to questions on overall order-books assessments and employment expectations. Data are seasonally adjusted.

2) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki za EU za zadnji mesec niso na voljo. / Data for EU for the last month are not available.

2. GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI, MAREC 2002–JANUAR 2007

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA, MARCH 2002–JANUARY 2007



1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

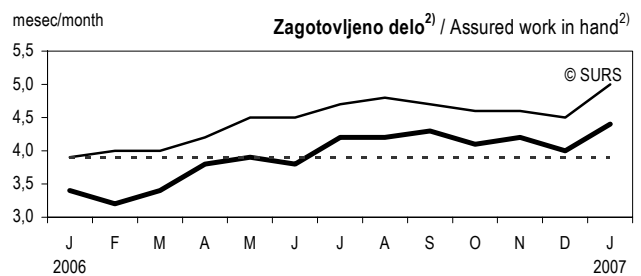
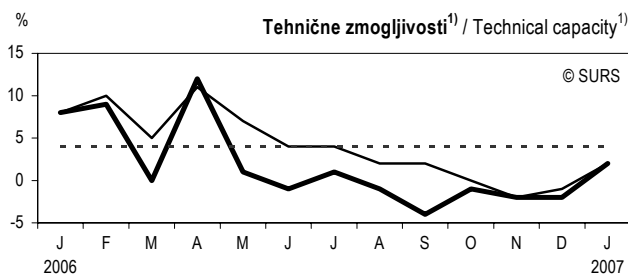
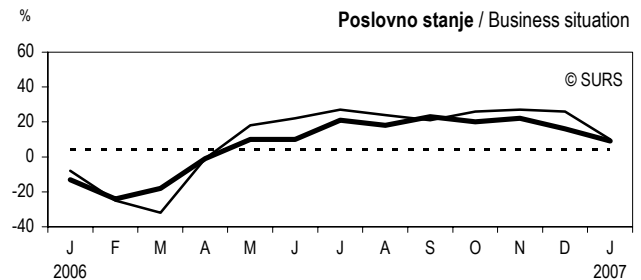
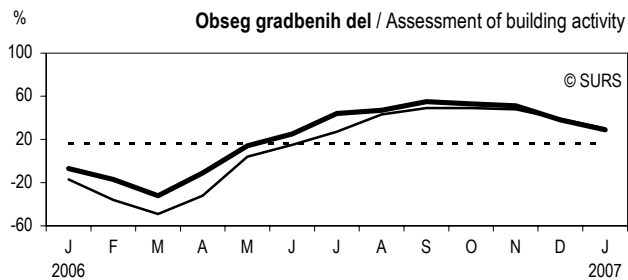


3. GIBANJE EKONOMSKIH KAZALNIKOV GLEDE NA VRSTO GRADBENIH OBJEKTOV, SLOVENIJA, JANUAR 2006– JANUAR 2007

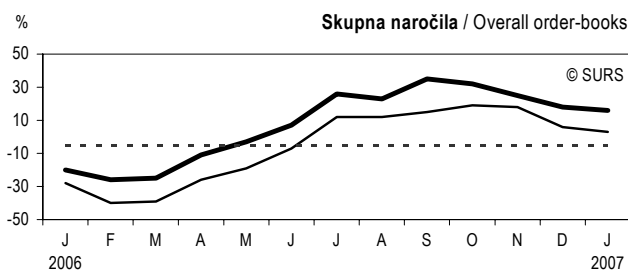
EVOLUTION OF ECONOMIC INDICATORS BY THE TYPE OF CONSTRUCTION, SLOVENIA, JANUARY 2006– JANUARY 2007

3.1 Gibanje ekonomskih kazalnikov za stavbe, Slovenija, januar 2006–januar 2007

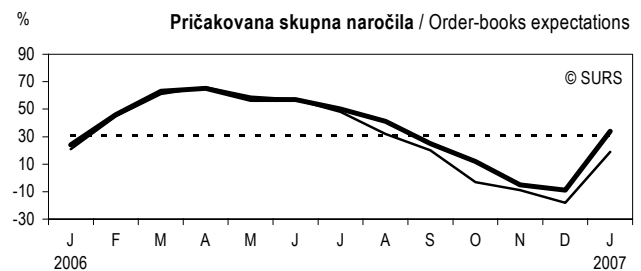
Evolution of economic indicators for buildings, Slovenia, January 2006–January 2007



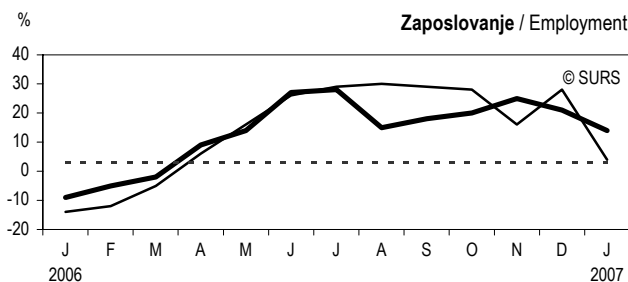
Ocena stanja / Appreciation of situation



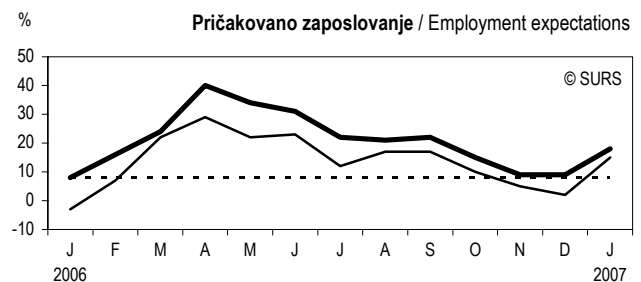
Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



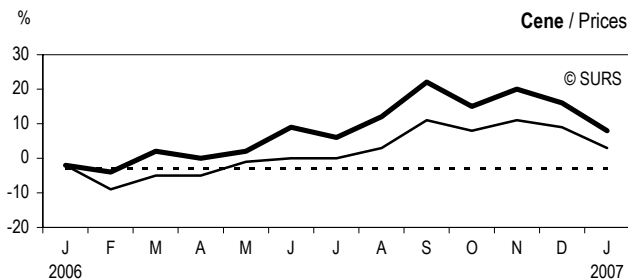
Zaposlovanje / Employment



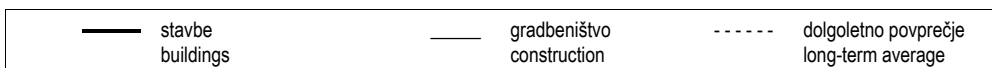
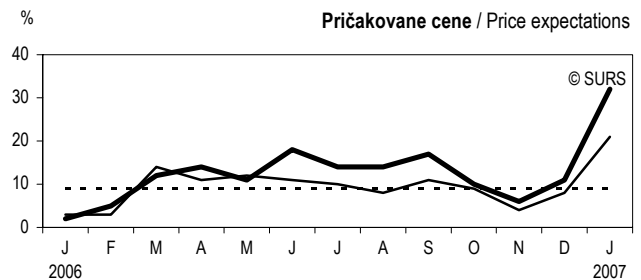
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



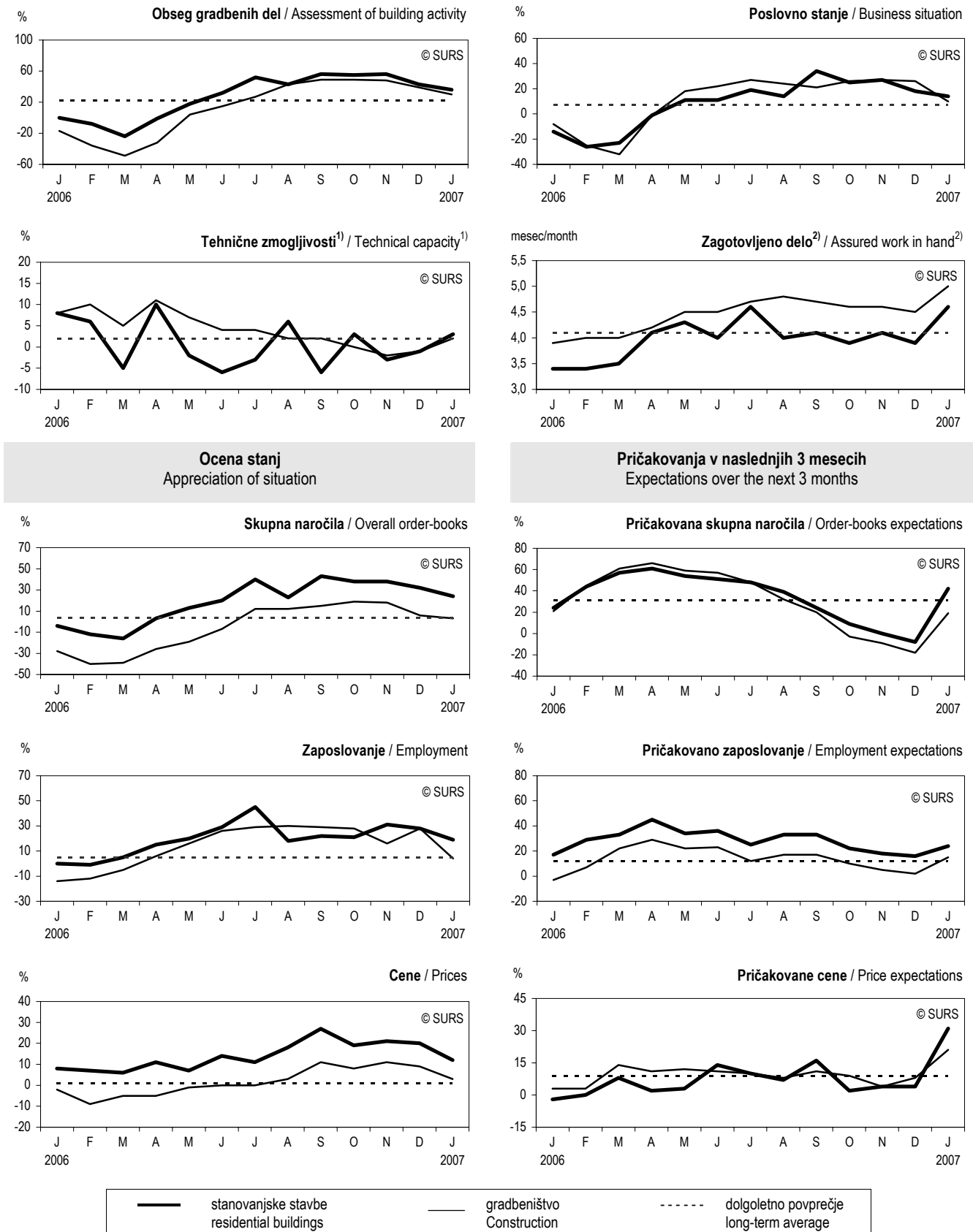
Pričakovane cene / Price expectations



1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodбами dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

3.2 Gibanje ekonomskih kazalnikov za stanovanjske stavbe, Slovenija, januar 2006–januar 2007

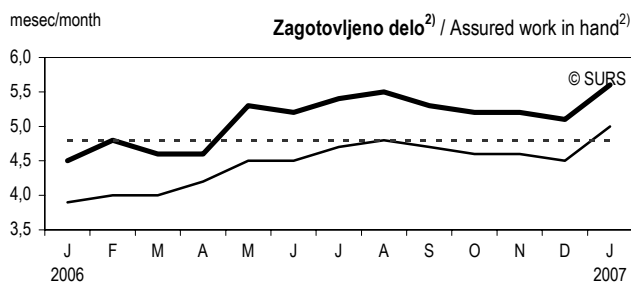
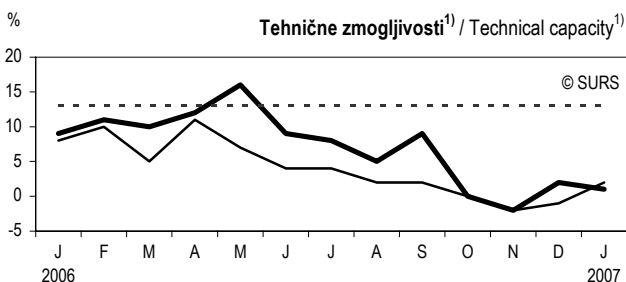
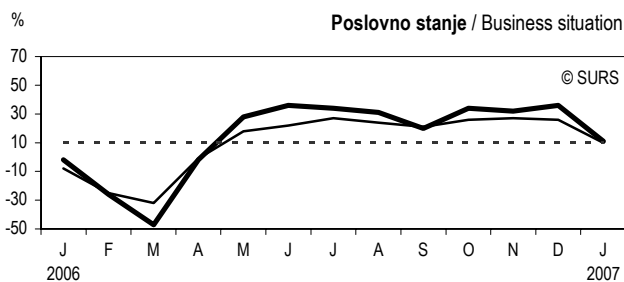
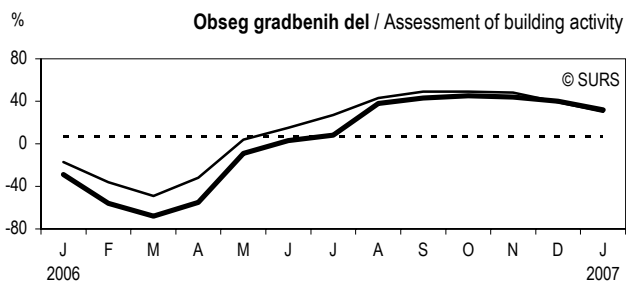
Evolution of economic indicators for residential buildings, Slovenia, January 2006–January 2007



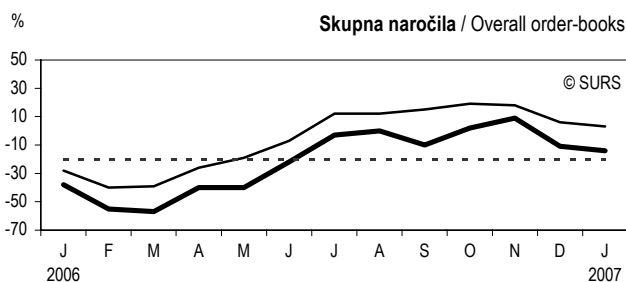
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

3.3 Gibanje ekonomskih kazalnikov za gradbene inženirske objekte, Slovenija, januar 2006–januar 2007

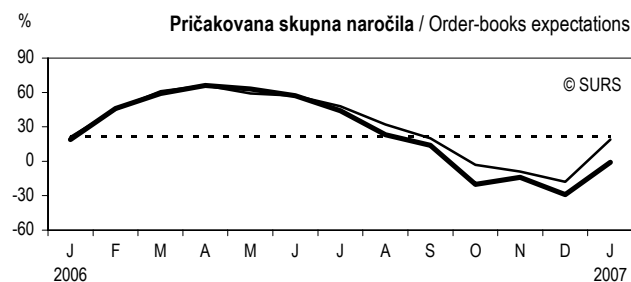
Evolution of economic indicators for civil engineering, Slovenia, January 2006–January 2007



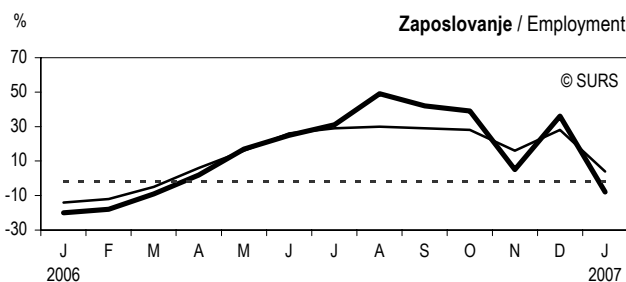
Ocena stanja
Appreciation of situation



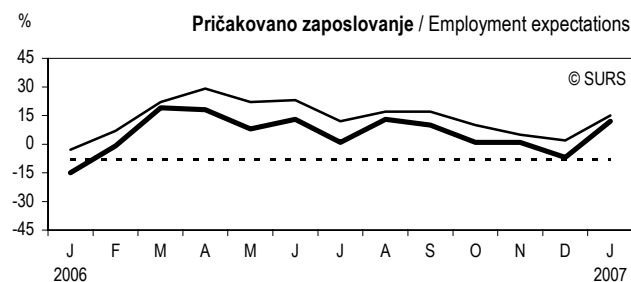
Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



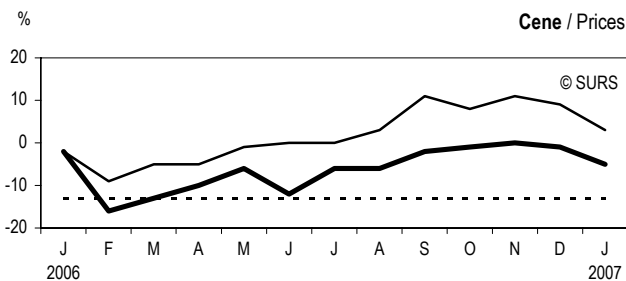
Zaposlovanje / Employment



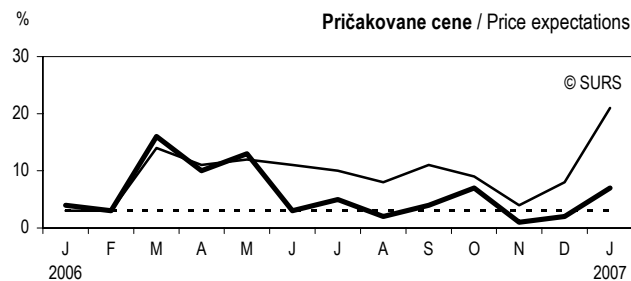
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

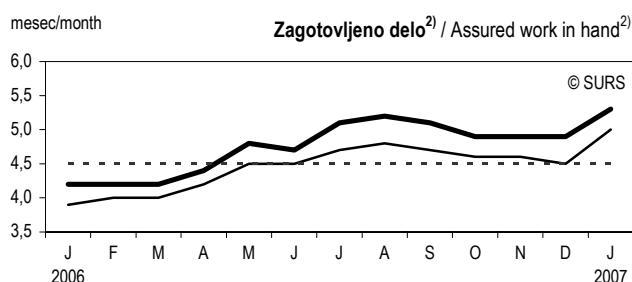
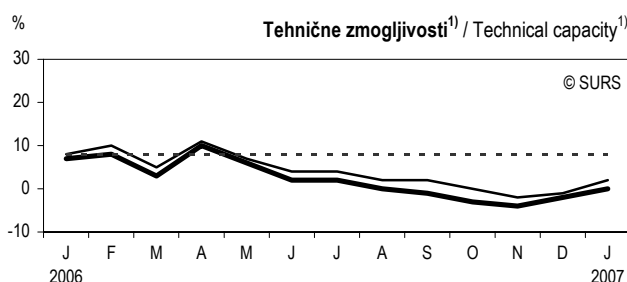
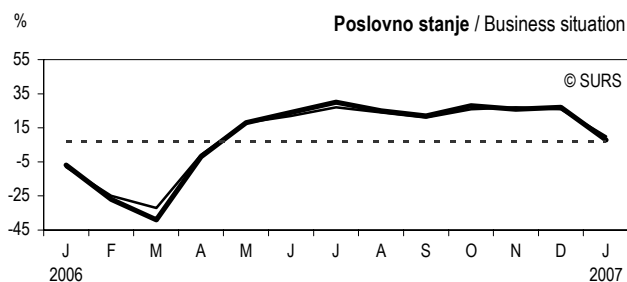
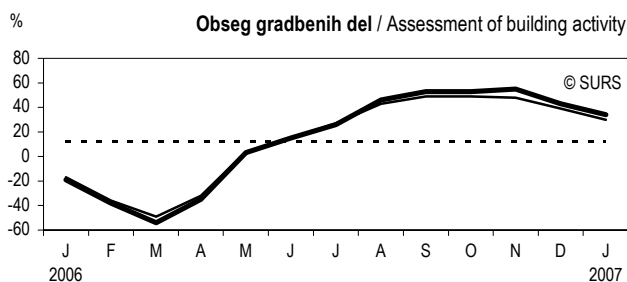


— gradbeni inženirski objekti / civil engineering — gradbeništvo / Construction - - - - - dolgoletno povprečje / long-term average

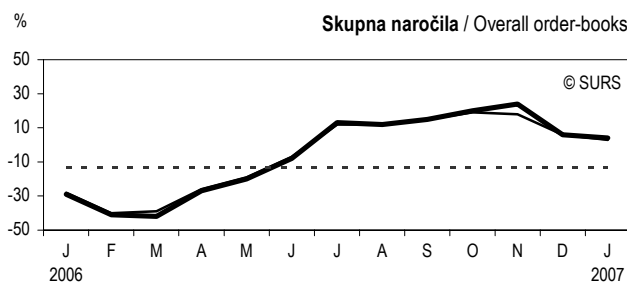
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

4. GIBANJE EKONOMSKIH KAZALNIKOV V PODJETJIH PO DEJAVNOSTIH, SLOVENIJA, JANUAR 2006– JANUAR 2007 EVOLUTION OF ECONOMIC INDICATORS IN ENTERPRISES BY ACTIVITY, SLOVENIA, JANUARY 2006– JANUARY 2007

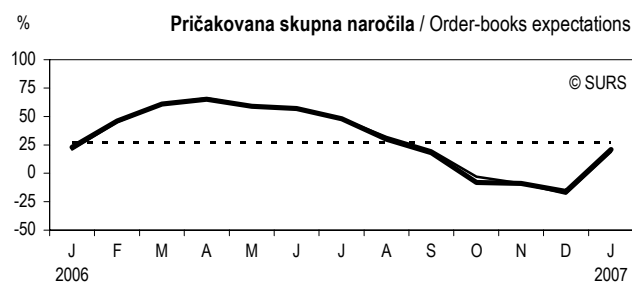
4.1 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo gradnja objektov in delov objektov, Slovenija, januar 2006–januar 2007 Evolution of economic indicators in enterprises engaged in construction works, Slovenia, January 2006–January 2007



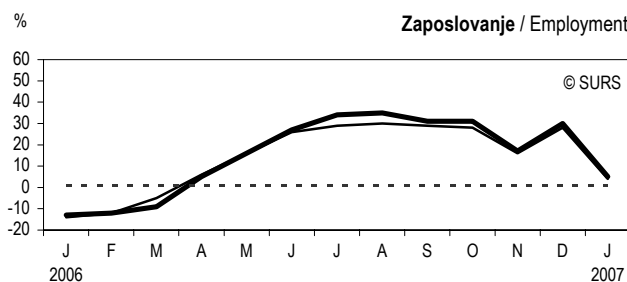
Ocena stanja Appreciation of situation



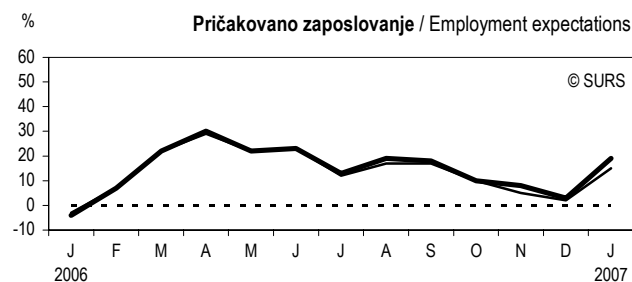
Pričakovanja v naslednjih 3 mesecih Expectations over the next 3 months



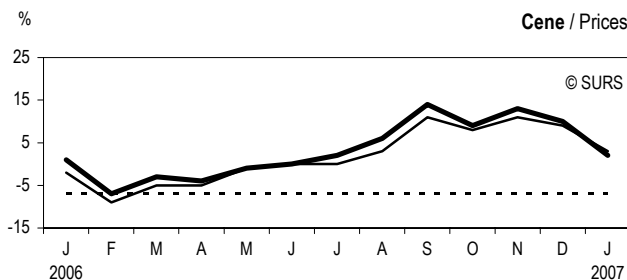
Zaposlovanje / Employment



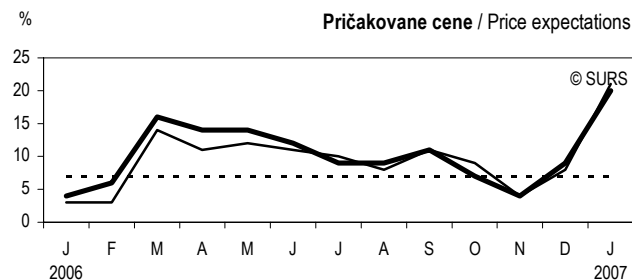
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations



— gradnja objektov in delov objektov
construction works

— gradbeništvo
Construction

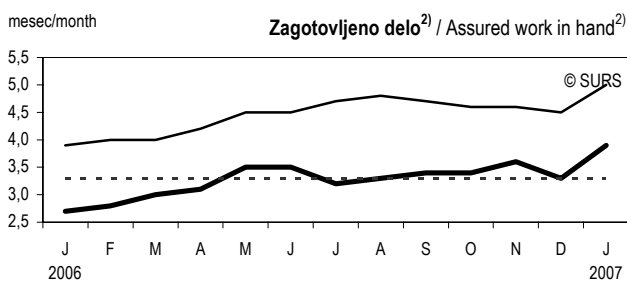
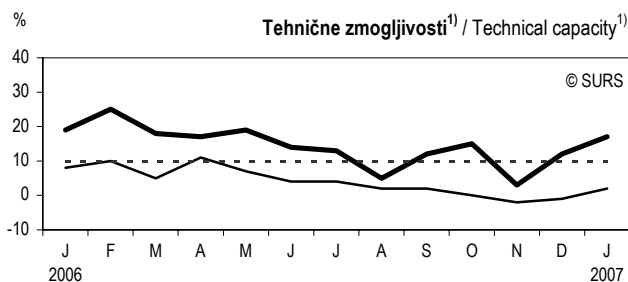
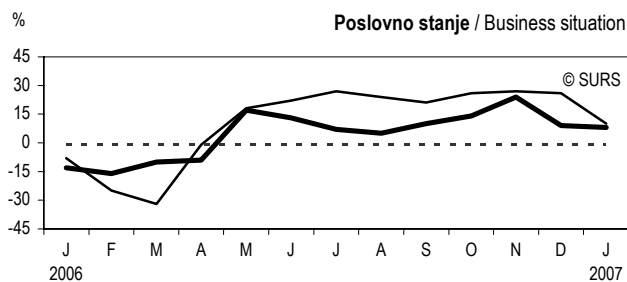
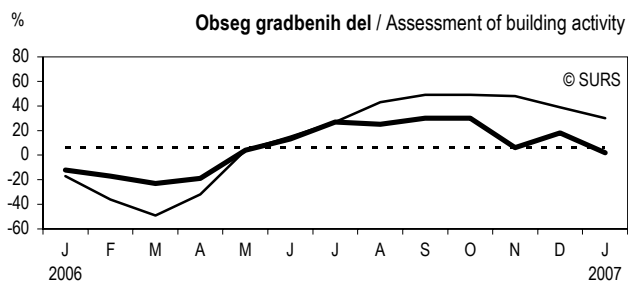
----- dolgoletno povprečje
long-term average

- 1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

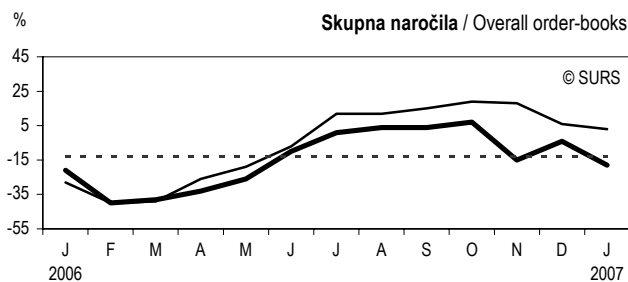


4.2 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo inštalacije pri gradnjah, Slovenija, januar 2006–januar 2007

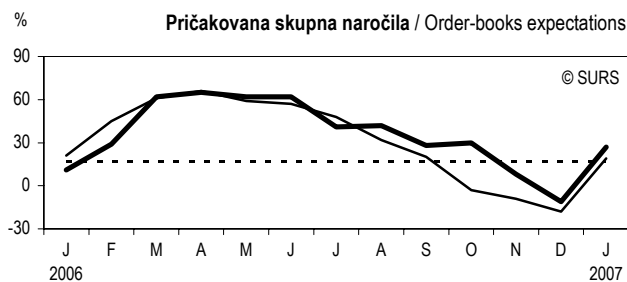
Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, Slovenia, January 2006–January 2007



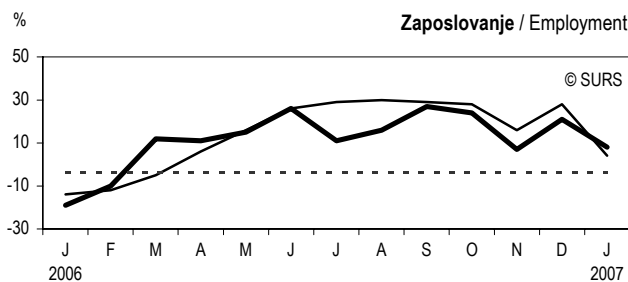
Ocena stanj
Appreciation of situation



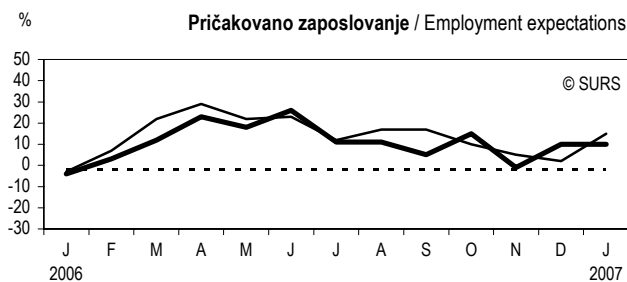
Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



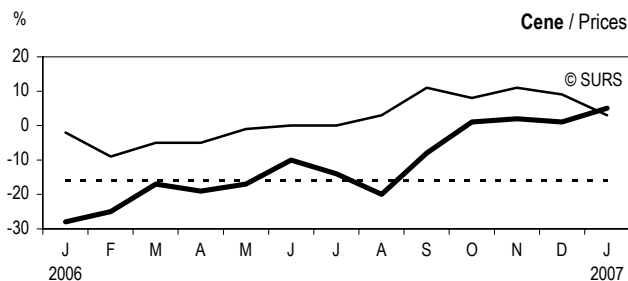
Zaposlovanje / Employment



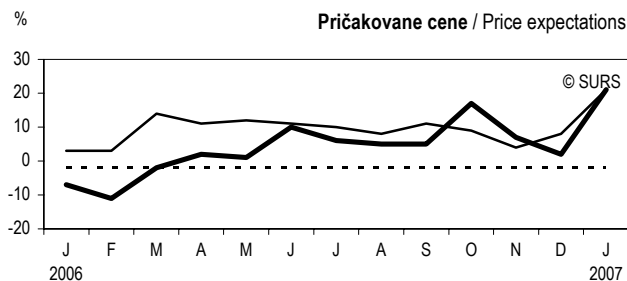
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

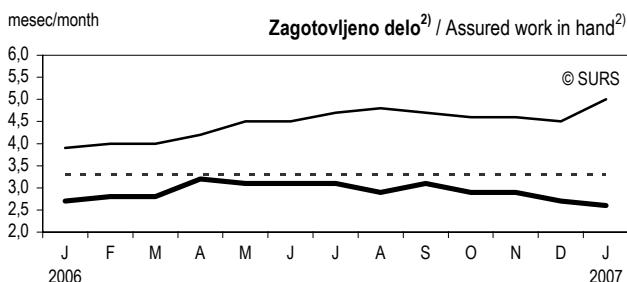
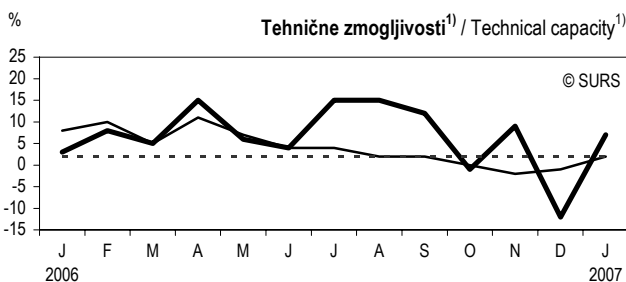
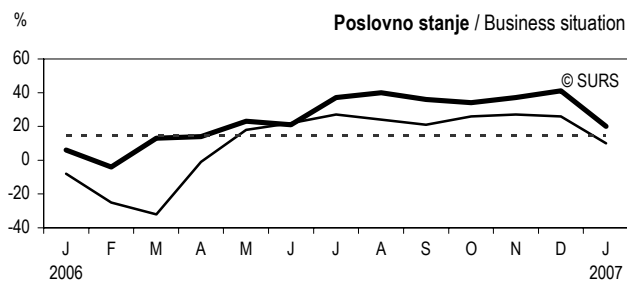
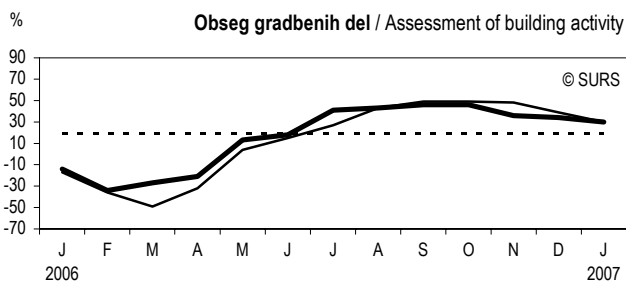


— inštalacije pri gradnjah / installation of equipment and fixtures — gradbeništvo / Construction - - - - - dolgoletno povprečje / long-term average

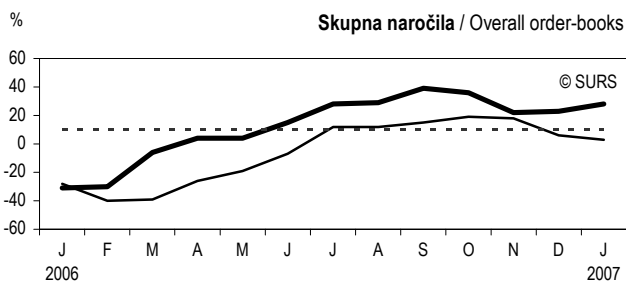
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

4.3 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo zaključna gradbena dela, Slovenija, januar 2006–januar 2007

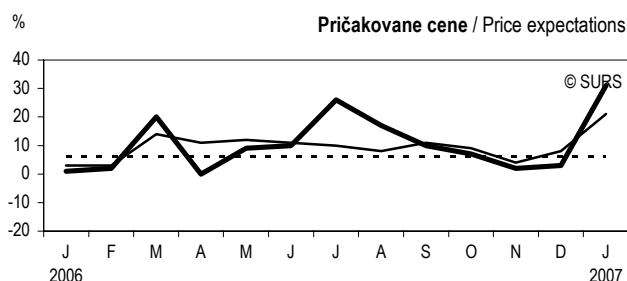
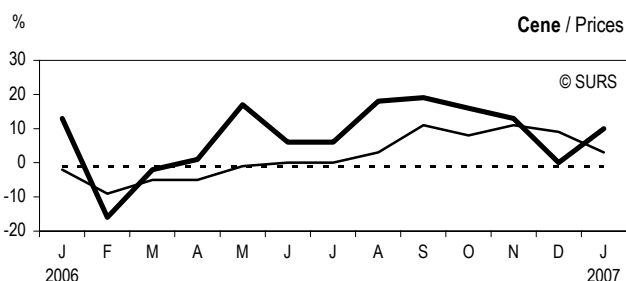
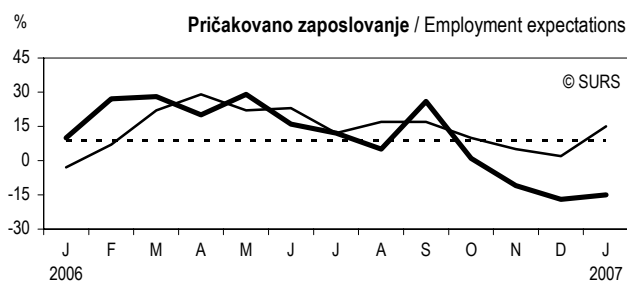
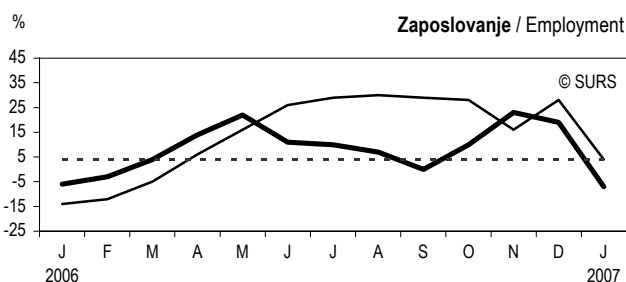
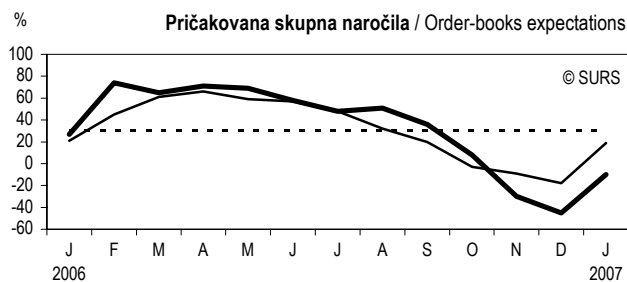
Evolution of economic indicators in enterprises engaged in finishing works, Slovenia, January 2006–January 2007



Ocena stanja
Appreciation of situation



Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



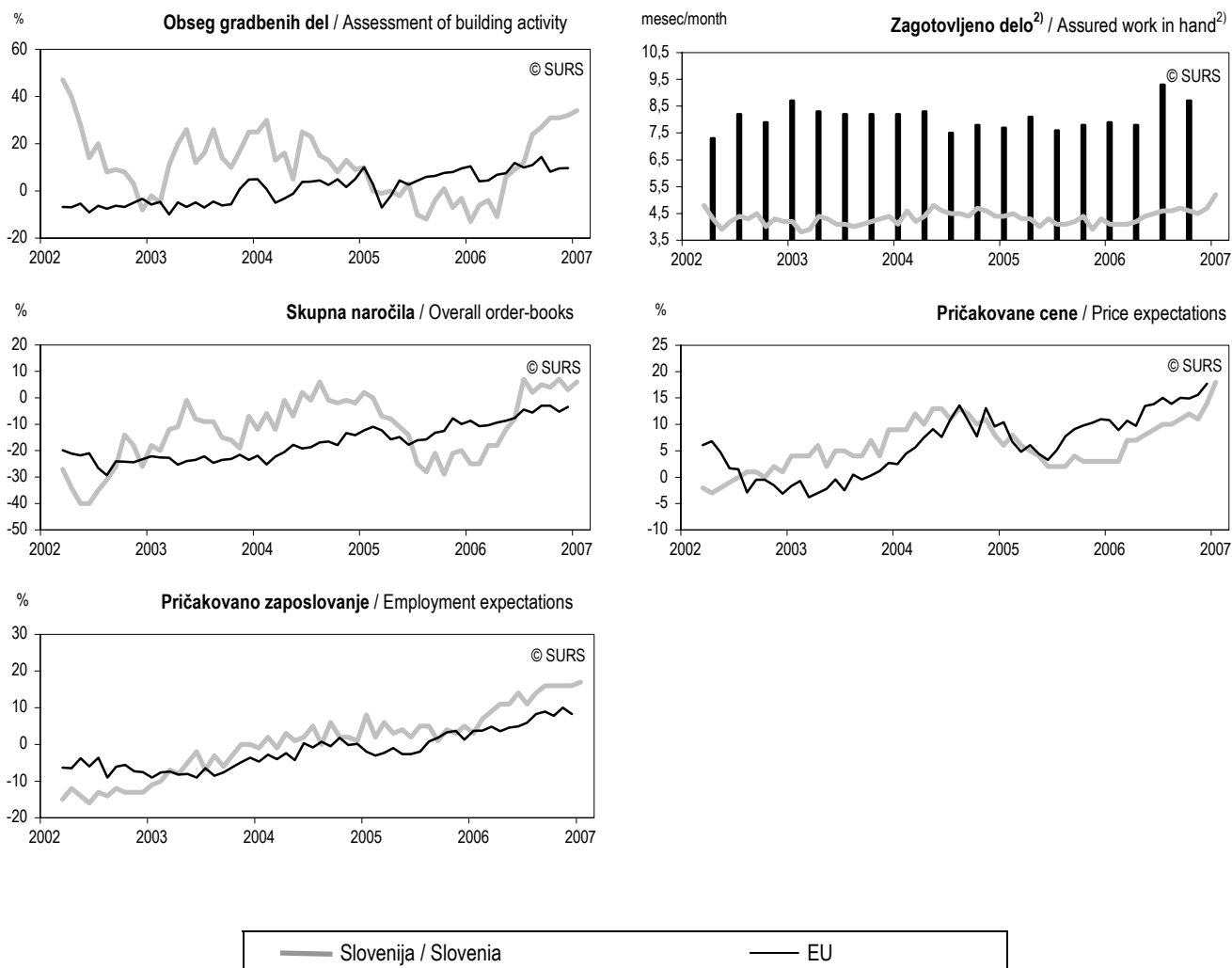
— zaključna gradbena dela finishing works — gradbeništvo Construction - - - - - dolgoletno povprečje long-term average

1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

5. GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI IN EU, MAREC 2002–JANUAR 2007¹⁾

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA AND THE EU, MARCH 2002– JANUARY 2007¹⁾

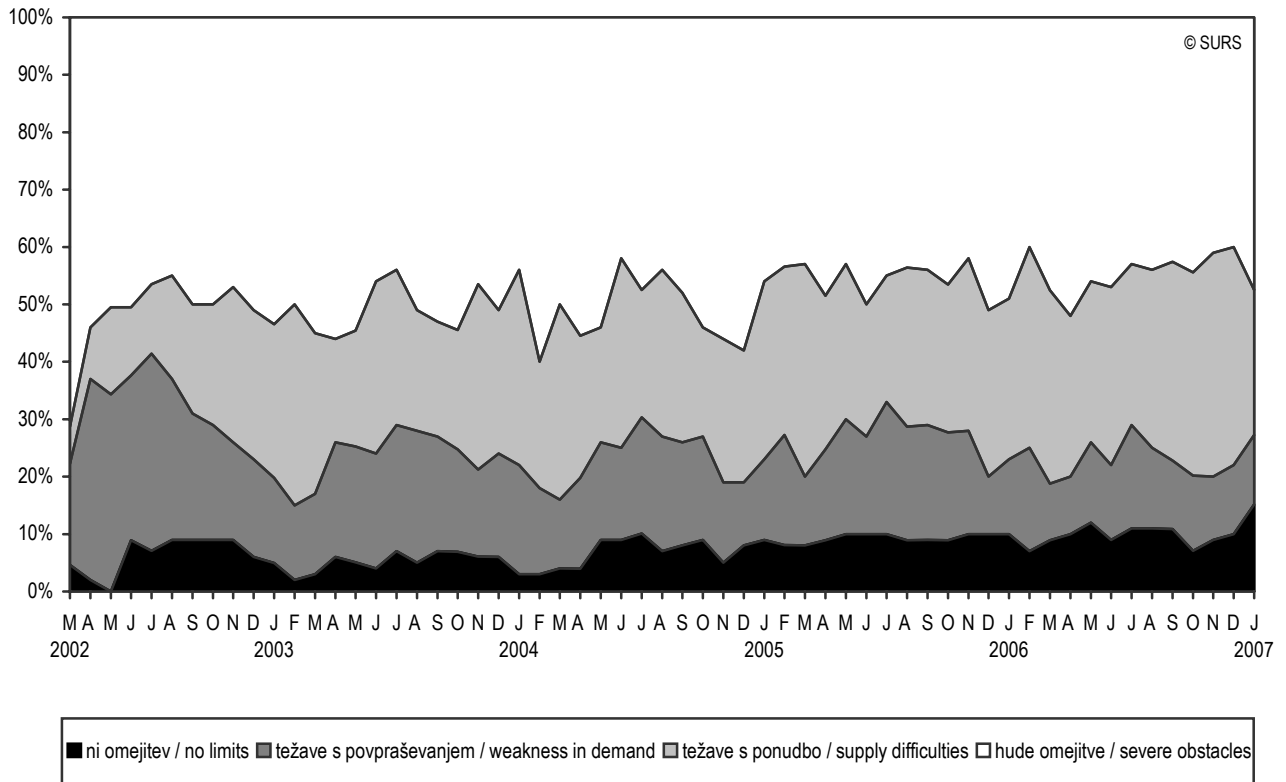


1) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki o EU za zadnji mesec niso na voljo. Podatki so desezonirani. / Data for the EU for the last month are not available. Data are seasonally adjusted.

2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. Kazalnik opazujejo v EU vsake 3 mesece. / With normal working hours, works in progress and contracts in hand. In the EU the indicator is observed every three months.

6. OMEJITVENI DEJAVNIKI V GRADBENIŠTVU V SLOVENIJI, MAREC 2002–JANUAR 2007

FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002–JANUARY 2007



Graf ponazarja deleže zaposlenih v gradbeništvu, ki imajo naslednje skupine težav:

- Skupina **"ni omejitev"** zajema zaposlene, ki se ne soočajo z omejitvami.
- Skupina **"težave s povpraševanjem"** zajema zaposlene, ki imajo težave z nezadostnim povpraševanjem in konkurenco v dejavnosti.
- Skupina **"težave s ponudbo"** zajema zaposlene, ki imajo težave s slabimi vremenskimi pogoji, visokimi finančnimi stroški, visokimi stroški materiala in dela, težave pri pridobivanju kreditov. V to skupino sodijo tudi podjetja, ki imajo težave s pomanjkanjem usposobljenih delavcev, opreme in materialov.
- Skupina **"hude omejitve"** zajema zaposlene, ki imajo hkrati težave z dejavniki iz skupine "šibko povpraševanje" in z dejavniki iz skupine "težave s preskrbo".

The chart on production obstacles shows the share of employees who are facing the following groups of problems:

- Group **"no limits"** includes employees with no limits in building activity.
- Group **"weakness in demand"** includes employees who are facing insufficient demand and competition in own sector.
- Group **"supply difficulties"** includes employees who are facing bad weather conditions, high cost of finance, materials and/or labour; difficulties with access to bank credits, lack of equipment, and shortage of skilled labour and shortage of materials.
- Group **"severe obstacles"** includes employees who are facing at the same time problems from the group "weakness in demand" and those from the group "supply difficulties".

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

Namen kvalitativne Ankete o poslovnih tendencah v gradbeništvu (PA-GRAD/M) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalnikov ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalnika zaupanja v gradbeništvu.

Anketo o poslovnih tendencah v gradbeništvu izvajamo v Sloveniji od marca 2002 s poenotenim vprašalnikom, na podlagi poenotene metodologije in z enako periodiko, kot jo izvajajo v državah članicah Evropske unije že več desetletij. Zato so vsi podatki neposredno primerljivi.

ENOTE OPAZOVANJA

Opazujemo podjetja, ki so razvrščena v gradbeništvu, to je v oddelek 45 Standardne klasifikacije dejavnosti (SKD), in imajo 11 zaposlenih ali več ter so bila izbrana na podlagi dveh meril, in sicer:

- velikosti (število zaposlenih, skladno z zakonom o gospodarskih družbah) in
- razvrstitve podjetja po SKD.

VIRI

Na vprašalnik odgovarjajo direktorji podjetij ali drugi vodilni delavci med 1. in 10. v mesecu za tekoči mesec.

ZAJETJE

V anketo smo zajeli vsa velika in srednje velika podjetja in 75 % malih podjetij (ali 74 % zaposlenih). Panelni vzorec pokriva 82 % podjetij vzorčnega okvira ali 93 % zaposlenih v gradbeništvu.

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

Odgovori so uteženi tako, da odražajo relativno pomembnost posameznega podjetja v vzorcu. Znotraj oddelkov SKD so odgovori uteženi s številom zaposlenih.

NEODGOVORI

Neodgovore vsak mesec obdelamo skladno s poenoteno metodologijo; delež neodgovorov se giblje med 5 in 10 % (povprečno 8 %).

DEFINICIJE

Grafikoni prikazujejo ravnotežja po posameznih vprašanjih. **Ravnotežje** je razlika med pozitivnimi in negativnimi odgovori, izražena v odstotkih. Ravnotežja prikazujejo gibanje opazovanih ekonomskih spremenljivk (stanj in pričakovanj), ne pa dejanskih velikosti ekonomskih kazalnikov.

Ko so prikazane daljše časovne vrste podatkov ali primerjave kazalnikov s kazalniki EU, so vrednosti **desezonirane**. To so vrednosti, pri katerih je izključen vpliv

METHODOLOGICAL EXPLANATIONS

PURPOSE OF STATISTICAL SURVEY

The purpose of the qualitative Survey on Business Tendency in Construction (hereinafter: PA-GRAD/M) is to get monthly information about current situations of major economic indicators and to evaluate their movement in the following months. The results of the survey are the basis for evaluation of the construction confidence indicator.

We have been carrying out the Survey on Business Tendency in Construction in Slovenia since March 2002 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades. Therefore, all data are directly comparable.

OBSERVATION UNITS

We are monitoring units that are registered in construction – division 45 of the Standard Classification of Activities (SKD) and have 11 or more employees. They were selected by two criteria:

- the size of the enterprise (the number of employees in accordance with the Companies Act),
- classification of the enterprise according to the SKD.

SOURCES

Respondents to the monthly questionnaire are managers of enterprises or other executives. They respond between the 1st and the 10th in the month for the current month.

COVERAGE

The panel includes all large and medium-sized enterprises and 75% of small enterprises (or 74% of employees). The panel covers 82% of the enterprises of the studied population or 93% of employees in construction.

METHOD OF DATA COLLECTING

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

Responses to individual questions are weighted so that they reflect relative importance of an individual enterprise in the panel. Inside divisions of Standard Classification of Activities (SKD) responses are weighted with the number of employees.

NON-RESPONSES

Non-responses are processed every month in accordance with the harmonised methodology and vary between 5 and 10% (8% on average).

DEFINITIONS

The charts show the balance by individual questions. The **balance** is the difference between positive and negative answers, expressed in percent. The balance shows the movement of observed economic variables (present situation and future expectations), and not the real size of economic indicators.

In the charts with longer time series or by comparisons with EU indicators, data are **seasonally adjusted**. Values are adjusted for the seasonal component, but include the trend-cycle



sezone, vsebujejo pa trend-cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINITIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na modelih ARIMA. Pri oblikovanju modelov je upoštevano časovno obdobje od marca 2002 do januarja 2006.

Kazalnik zaupanja v gradbeništvo je povprečje odgovorov (ravnotežij) na vprašanji o sedanjih skupnih naročilih in pričakovanemu zaposlovanju.

OBJAVLJANJE PODATKOV

Sodelujoči v anketi prejmejo informacijo o gradbeništvo kot celoti, o oddelku SKD, v katerega se po dejavnosti razvrščajo in glede na vrsto gradnje, vendar le, če so izpolnili vprašalnik za tekoči mesec.

Ostalim uporabnikom so dostopni podatki na ravni gradbeništva in njegovih skupin ter podatki glede na vrsto gradnje. Slednji so mesečno objavljeni v Statističnih informacijah – Poslovne tendence v gradbeništvo in v podatkovni bazi SI-STAT na naslovu <http://www.stat.si>.

VPRAŠANJA:

- Obseg gradbenih del v zadnjih 3 mesecih: večji, enak, manjši?
- Dejavniki, ki omejujejo gradbeno dejavnost: ni omejitev, nezadostno povpraševanje, slabi vremenski pogoji, visoki stroški materiala, visoki stroški dela, visoki finančni stroški, težave pri pridobivanju kreditov, pomanjkanje usposobljenih delavcev, pomanjkanje opreme, pomanjkanje materialov, velika konkurenca v dejavnosti, ostalo?
- Sedanja naročila v tujini: višja kot normalna, normalna, nižja kot normalna?
- Sedanja domača naročila: višja kot normalna, normalna, nižja kot normalna?
- Sedanja skupna naročila: višja kot normalna, normalna, nižja kot normalna?
- Pričakovana naročila v naslednjih 3 mesecih: zrasla, ostala nespremenjena, padla?
- Zaposlovanje v zadnjem mesecu: povečalo, ostalo enako, zmanjšalo?
- Pričakovano zaposlovanje v naslednjih 3 mesecih: povečalo, ostalo enako, zmanjšalo?
- Cene so se: zvišale, ostale enake, znižale?
- Pričakovane cene v naslednjih 3 mesecih: naraščale, ostale enake, padale?
- Tehnične zmogljivosti glede na povpraševanje v naslednjih 12 mesecih: več kot zadostne, zadostne, nezadostne?
- Pri običajnih delovnih urah že začeto ali s pogodbnimi zagotovljeno dela za: ... mesecev?
- Poslovno stanje v primerjavi s preteklim mesecem: boljše, enako, slabše?

component and the irregular component. Data for EU are seasonally adjusted by the DAINITIES method and for Slovenia by the TRAMO/SEATS method, which is based on ARIMA models. The designing of the models is based on the time period from March 2002 to January 2006.

Confidence indicator in construction is defined as the arithmetic mean of the answers (balances) to the questions on order-books assessments and employment expectations.

PUBLISHING

Persons participating in the survey get information for construction, division in which they are classified and for the type of construction. They get it only if they responded in the current month.

Other users can get data for construction and its groups, size of enterprises and type of construction. Data are published in the Rapid Reports – Business Tendency in Construction and in the SI-STAT database which is available at <http://www.stat.si/eng>.

QUESTIONS:

- Building activity over the past 3 months: increased, remained unchanged, decreased?
- Factors limiting building activity: none, insufficient demand, bad weather conditions, high cost of material, high cost of labour, high cost of capital, access to bank credit, shortage of skilled labour, shortage of equipment, shortage of material, competition in own sector, other?
- Assessment of foreign order books: above normal, normal, below normal?
- Assessment of domestic order books: above normal, normal, below normal?
- Assessment of overall order books: above normal, normal, below normal?
- Expected order books over the next 3 months: increase, remain unchanged, decrease?
- Assessment of employment: increased, remained unchanged, decreased?
- Employment expectations over the next 3 months: increase, remain unchanged, decrease?
- Assessment of prices: increased, remained unchanged, decreased?
- Expected prices over the next 3 months: increase, remain unchanged, decrease?
- Technical capacity regarding expected demand in the next 12 months: more than sufficient, sufficient, not sufficient?
- With normal working hours, the work in hand and work already contracted for ... months?
- Business situation compared to the previous month: better, the same, worse?

1) Podjetja lahko označijo več dejavnikov, ki omejujejo njihovo dejavnost, zato vsota odstotkov ni 100.
Enterprises can select several factors limiting their business, so the total is not 100%.

KOMENTAR

Januarja 2007 so direktorji ocenili poslovne tendence v gradbeništvu slabše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 1 odstotno točko nižja kot pretekli mesec. V primerjavi z januarjem 2006 je bila višja za 25 odstotnih točk in za 8 odstotnih točk je bila višja od povprečja lanskega leta.

POSLOVNO STANJE

Desezonirana vrednost kazalnika poslovno stanje je bila v primerjavi s preteklim mesecem nižja za 5 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 18 odstotnih točk in za 6 odstotnih točk je bila višja od lanskega povprečja.

OBSEG GRADBENIH DEL

Desezonirana vrednost kazalnika obseg gradbenih del se je v primerjavi s preteklim mesecem zvišala za 2 odstotni točki in s tem dosegla najvišjo vrednost po aprilu 2002. Glede na isti mesec lani je bila višja za 47 odstotnih točk in za 22 odstotnih točk je bila višja od povprečja lanskega leta.

SKUPNA NAROČILA IN PRIČAKOVANA SKUPNA NAROČILA

Desezonirana vrednost kazalnika skupna naročila se je v primerjavi s preteklim mesecem zvišala za 3 odstotne točke. Glede na isti mesec lani je bila višja za 31 odstotnih točk in za 13 odstotnih točk je bila višja od lanskega povprečja.

Desezonirana vrednost kazalnika pričakovana skupna naročila za naslednje tri mesece se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 2 odstotni točki in za 3 odstotne točke je bila nižja od povprečja lanskega leta.

ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalnika zaposlovanje se je v primerjavi s preteklim mesecem znižala za 11 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 18 odstotnih točk in za 4 odstotne točke je bila višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika pričakovano zaposlovanje se je v primerjavi s preteklim mesecem zvišala še za 1 odstotno točko in s tem dosegla najvišjo vrednost v celotnem opazovanem obdobju. Glede na isti mesec lani je bila višja za 18 odstotnih točk in za 5 odstotnih točk je bila višja od lanskega povprečja.

CENE IN CENOVNA PRIČAKOVANJA

Desezonirana vrednost kazalnika cene se je v primerjavi s preteklim mesecem znižala za 2 odstotni točki. Glede na isti mesec lani je bila višja za 5 odstotnih točk in za 3 odstotne točke je bila višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika cenovna pričakovanja za naslednje tri mesece se je v primerjavi s preteklim mesecem zvišala za 4 odstotne točke in s tem dosegla najvišjo vrednost v celotnem opazovanem obdobju. Glede na isti

COMMENT

In January 2007, managers estimated business tendencies in construction as being worse than in the previous month. The seasonally adjusted value of the confidence indicator fell by 1 percentage point compared to the previous month. Compared to January 2006 it was up by 25 percentage points and it was 8 percentage points above last year's average.

BUSINESS SITUATION

Compared to the previous month the seasonally adjusted value of the business situation indicator fell by 5 percentage points. Compared to January 2006 it was up by 18 percentage points and compared to last year's average by 6 percentage points.

BUILDING ACTIVITY

The seasonally adjusted value of the building activity indicator rose by 2 percentage points compared to the previous month and has reached the highest value since April 2002. Compared to January 2006 and last year's average it was up by 47 and 22 percentage points, respectively.

OVERALL ORDER-BOOKS AND EXPECTED ORDER-BOOKS

The seasonally adjusted value of the overall order-books indicator rose by 3 percentage points compared to the previous month. Compared to January 2006 and last year's average it was up by 31 and 13 percentage points, respectively.

The seasonally adjusted value of the expected order-books for the next three months rose by 1 percentage point compared to the previous month. Compared to January 2006 it was down by 2 percentage points and 3 percentage points below last year's average.

EMPLOYMENT AND EMPLOYMENT EXPECTATIONS

The seasonally adjusted value of the employment indicator fell by 11 percentage points compared to the previous month. Compared to January 2006 it was up by 18 percentage points and compared to last year's average by 4 percentage points.

The seasonally adjusted value of the expected employment indicator rose by 1 percentage point compared to the previous month and reached the highest value in the whole observed period. Compared to January 2006 it was up by 18 percentage points and compared to last year's average by 5 percentage points.

PRICES AND PRICE EXPECTATIONS

The seasonally adjusted value of the prices indicator fell by 2 percentage points compared to the previous month. Compared to January 2006 it was up by 5 percentage points and was 3 percentage points above last year's average.

The seasonally adjusted value of the price expectations indicator for the next three months rose by 4 percentage points compared to the previous month and reached the highest value in the whole observed period. Compared to



mesec lani je bila višja za 18 odstotnih točk in za 9 odstotnih točk je bila višja od povprečja lanskega leta.

TEHNIČNE ZMOGLJIVOSTI

Desezonirana vrednost kazalnika tehnične zmogljivosti zajema oceno količine in kakovosti opreme glede na povpraševanje v naslednjih 12 mesecih.

Desezonirana vrednost tega kazalnika se je v primerjavi s preteklim mesecem zvišala za 3 odstotne točke. Glede na isti mesec lani je bila nižja za 6 odstotnih točk in za 1 odstotno točko je bila nižja od lanskega povprečja.

ZAGOTOVLJENO DELO

Desezonirana vrednost kazalnika zagotovljeno delo temelji na oceni števila mesecev, za katere je delo zagotovljeno s pogodbami.

V januarju 2007 so imela podjetja s pogodbami zagotovljeno delo v povprečju za 5,2 meseca, kar je najvišja vrednost v celotnem opazovanem obdobju. To je za 1,1 meseca več kot v istem mesecu lani in za 0,8 meseca več od povprečja lanskega leta.

OMEJITVENI DEJAVNIKI

Med omejitvenimi dejavniki v gradbeništvu so prevladovali dejavniki iz skupine hude omejitve. V tem mesecu se je z njimi spopadalo 47 % zaposlenih (oziroma 32 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu se je z njimi srečevalo 25 % zaposlenih (oziroma 38 % podjetij).

Dejavniki iz skupine šibko povpraševanje so v tem mesecu povzročali težave 12 % zaposlenih (oziroma 13 % podjetij).

15 % zaposlenih (oziroma 16 % podjetij) v tem mesecu ni imelo omejitev.

Podrobnejši pregled omejitvenih dejavnikov v gradbeništvu v tem mesecu pokaže naslednje¹⁾:

- 41 % podjetij (ali 57 % zaposlenih) je omejevala velika konkurenca v dejavnosti;
- 40 % podjetij (ali 39 % zaposlenih) je omejevalo pomanjkanje usposobljenih delavcev;
- 29 % podjetij (ali 37 % zaposlenih) so omejevali visoki stroški dela;
- 25 % podjetij (ali 19 % zaposlenih) so omejevali visoki stroški materiala;
- 14 % podjetij (ali 15 % zaposlenih) so omejevali visoki finančni stroški;
- 14 % podjetij (ali 11 % zaposlenih) so omejevale slabe vremenske razmere;
- 8 % podjetij (ali 10 % zaposlenih) je omejevalo nezadostno povpraševanje;
- 7 % podjetij (ali 5 % zaposlenih) so omejevali drugi dejavniki;
- 6 % podjetij (ali 3 % zaposlenih) so omejevale težave pri pridobivanju kreditov;

January 2006 it was up by 18 percentage points and 9 percentage points above last year's average.

TECHNICAL CAPACITY

The seasonally adjusted value of the technical capacity indicator includes the evaluation of the quantity and quality of equipment regarding expected demand in the next 12 months.

The seasonally adjusted value of this indicator rose by 3 percentage points compared to the previous month. Compared to January 2006 it fell by 6 percentage points and was 1 percentage point below last year's average.

ASSURED WORK IN HAND

The value of the assured work indicator includes the evaluation of the number of months for which work is assured by contracts.

In January 2007, enterprises had work assured for 5.2 months on average, which is 1.1 month more than in January 2006 and 0.8 month more than last year's average.

LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In January 2007, 47% of employees (32% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In January 2007, 25% of employees (38% of enterprises) faced them.

The third most important obstacles were demand difficulties. In January 2007, 12% of employees (13% of enterprises) faced them.

15% of employees (16% of enterprises) experienced no obstacles in January 2007.

A more detailed overview of factors limiting building activity shows that in this month¹⁾:

- 41% of enterprises (or 57% of employees) were limited by competition in own sector;
- 40% of enterprises (or 39% of employees) were limited by shortage of skilled labour;
- 29% of enterprises (or 37% of employees) were limited by high costs of labour;
- 25% of enterprises (or 19% of employees) were limited by high costs of material;
- 14% of enterprises (or 15% of employees) were limited by high costs of capital;
- 14% of enterprises (or 11% of employees) were limited by bad weather conditions;
- 8% of enterprises (or 10% of employees) were limited by insufficient demand;
- 7% of enterprises (or 5% of employees) were limited by other factors;
- 6% of enterprises (or 3% of employees) were limited by access to bank credits;



- 2 % podjetij (ali 1 % zaposlenih) je omejevalo pomanjkanje opreme;
- 1 % podjetij (ali 1 % zaposlenih) je omejevalo pomanjkanje materialov.

Najobsežnejša omejitev v gradbeništvu je bila ponovno velika konkurenca v dejavnosti, sledile so ji pomanjkanje usposobljenih delavcev, visoki stroški dela in visoki stroški materiala.

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- 2% of enterprises (or 1% of employees) were limited by lack of equipment;
- 1% of enterprises (or 1% of employees) enterprises were limited by shortage of material.

The most important factor limiting building activity was competition in own sector, followed by shortage of skilled labour, high costs of labour and material.

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