



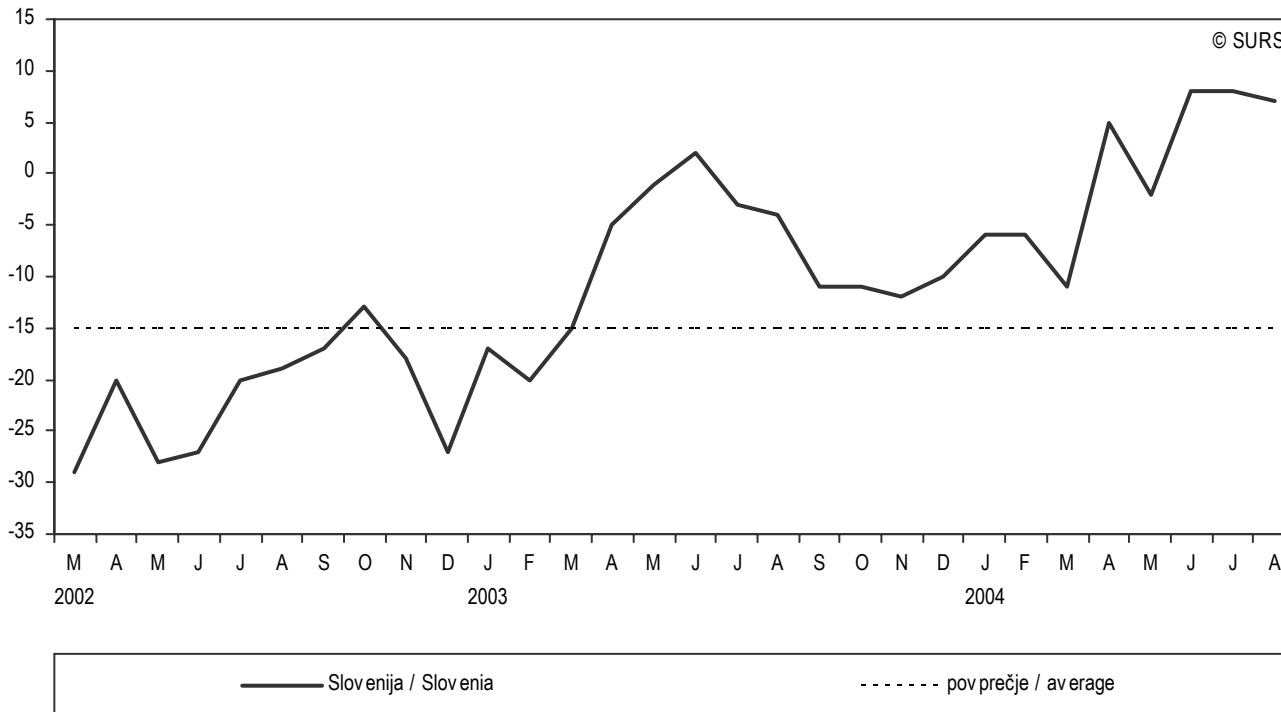
POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, MAREC 2002 - AVGUST 2004

BUSINESS TENDENCY IN CONSTRUCTION, SLOVENIA, MARCH 2002 - AUGUST 2004

- Avgusta so direktorji ocenili tendence v gradbeništvu slabše kot pretekli mesec. Kazalec zaupanja se je v primerjavi s preteklim mesecem znižal za 1 odstotno točko. Glede na isti mesec lani je bil višji za 11 odstotnih točk, hkrati pa za 16 odstotnih točk nad lanskim povprečjem.
- Na gibanje kazalca zaupanja v tem mesecu so vplivali zvišanje sedanjih skupnih naročil in znižanje pričakovanega zaposlovanja.
- Kazalci stanj so se v primerjavi s preteklim mesecem večinoma izboljšali. Pričakovanja za naslednje tri mesece, če izvezememo pričakovane cene in zagotovljeno delo, niso ugodna.
- In August 2004, managers estimated business tendencies in construction to be worse than in the previous month. The confidence indicator fell by 1 percentage point compared to the previous month, but rose by 11 percentage points compared to August 2003 and by 16 percentage points compared to last year's average.
- The evolution of the confidence indicator in this month was influenced by the rise of overall order books and expected employment.
- Observed indicators for appreciation of the situation improved compared to the previous month. The expectations for the next three months are not favourable, except for expected prices and assured work.

1. KAZALEC ZAUPANJA V GRADBENIŠTVU<sup>1)</sup>

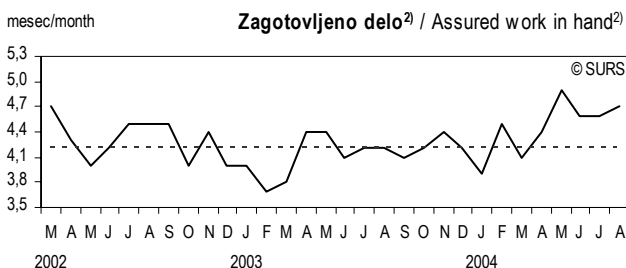
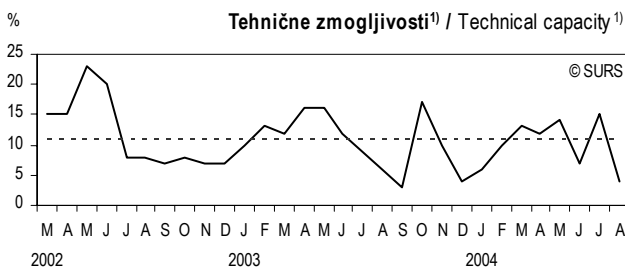
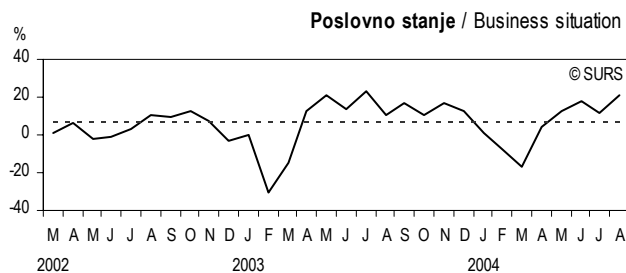
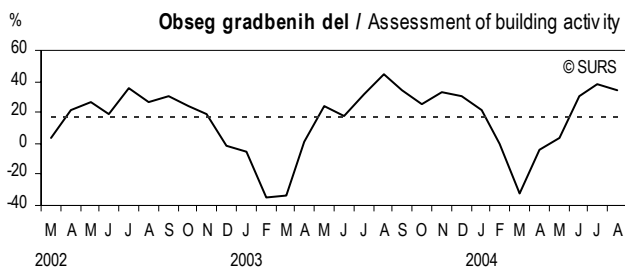
CONSTRUCTION CONFIDENCE INDICATOR<sup>1)</sup>



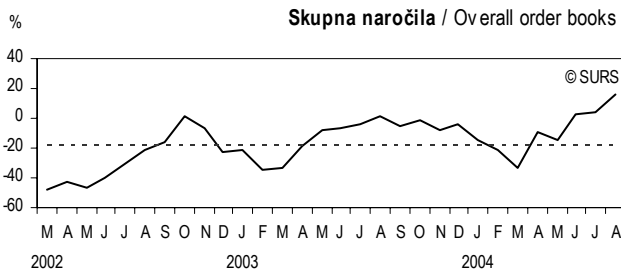
1) Kazalec zaupanja je povprečje odgovorov (ravnotežij) na vprašanji o sedanjih skupnih naročilih in pričakovanem zaposlovanju.  
The confidence indicator is an average of responses (balances) to questions on overall order books assessments and employment expectations.

## 2. GIBANJE EKONOMSKIH KAZALCEV V GRADBENIŠTVU V SLOVENIJI, MAREC 2002 - AVGUST 2004

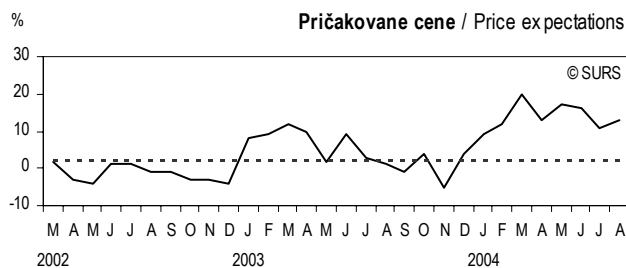
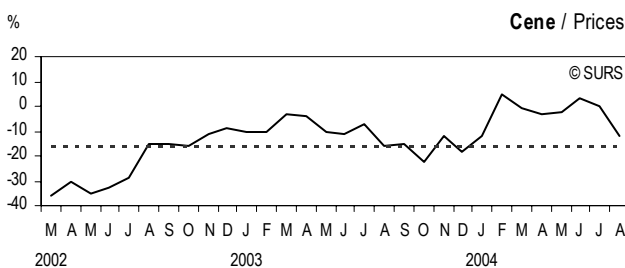
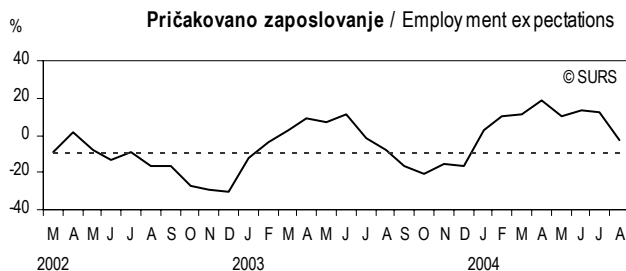
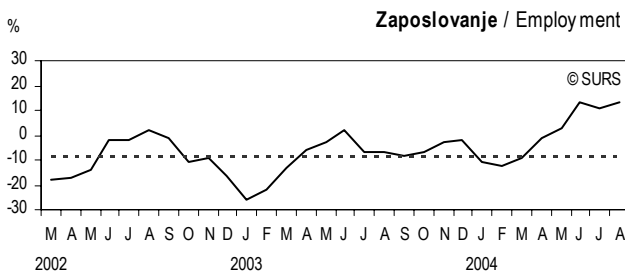
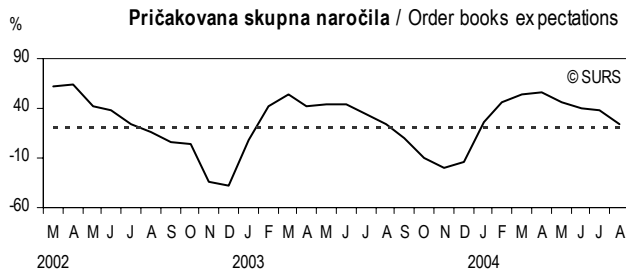
EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA, MARCH 2002 - AUGUST 2004



**Ocena stanj**  
Appreciation of situation



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



— originalni podatki  
raw data

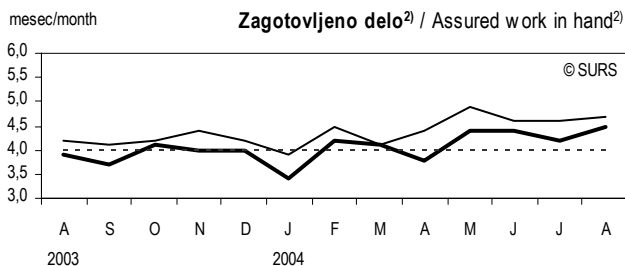
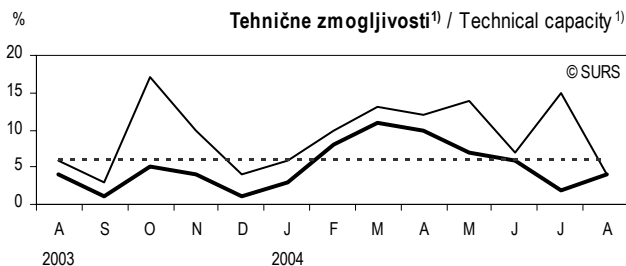
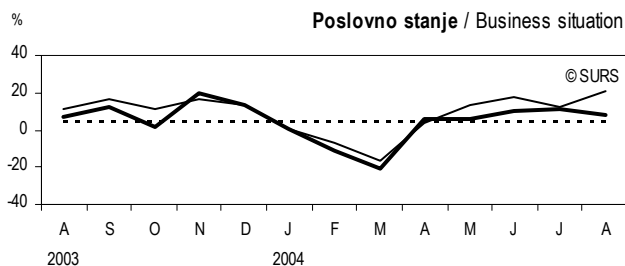
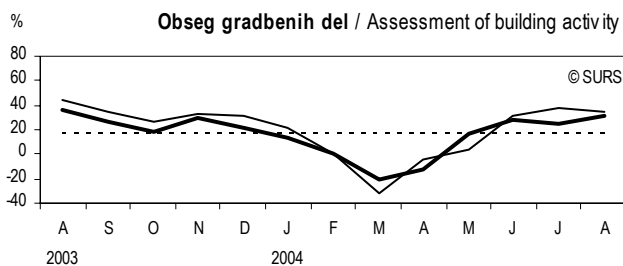
- - - - - povprečje  
average

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.

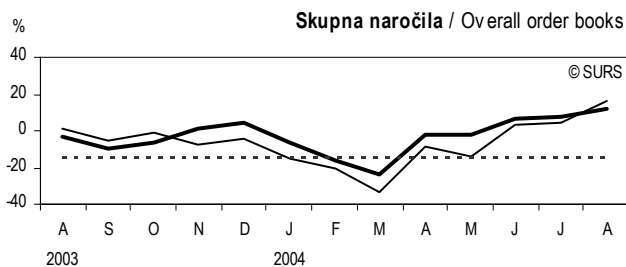
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

### 3.1 Gibanje ekonomskih kazalcev glede na vrsto gradbenih objektov, stavbe, avgust 2003 - avgust 2004

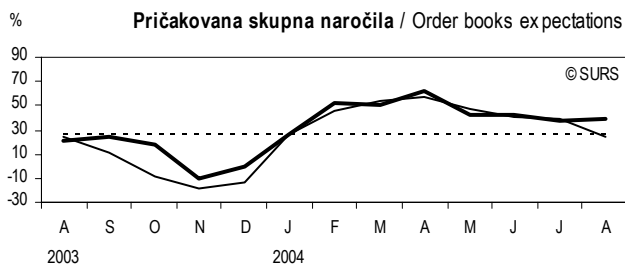
Evolution of economic indicators by the type of construction, buildings, August 2003 - August 2004



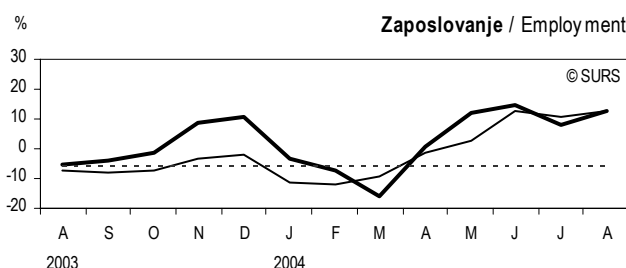
#### Ocena stanja / Appreciation of situation



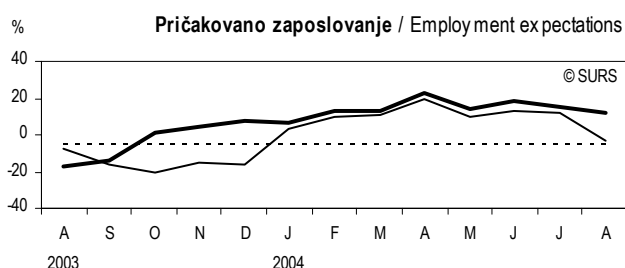
#### Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



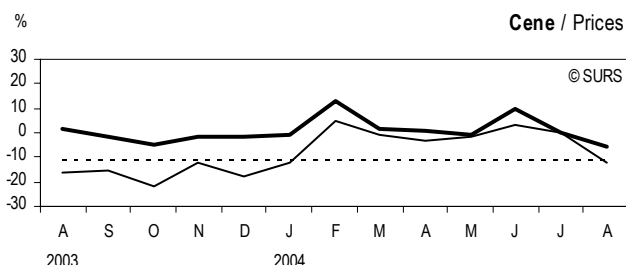
#### Zaposlovanje / Employment



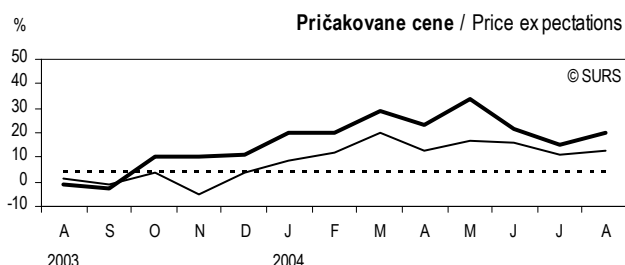
#### Pričakovano zaposlovanje / Employment expectations



#### Cene / Prices



#### Pričakovane cene / Price expectations

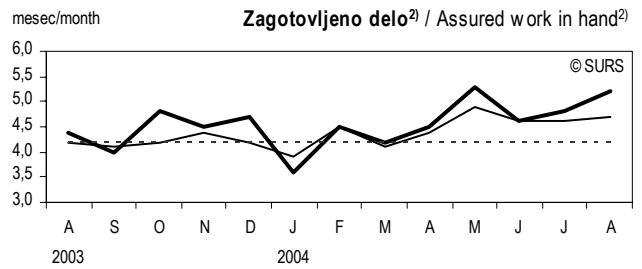
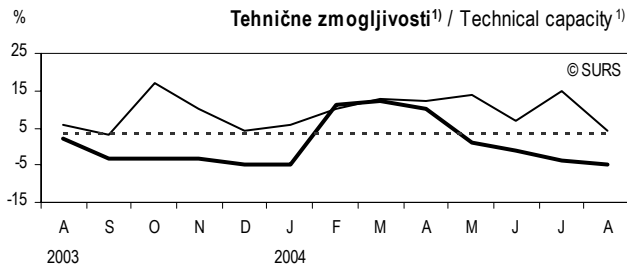
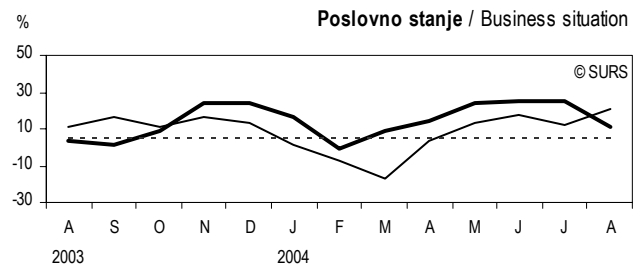
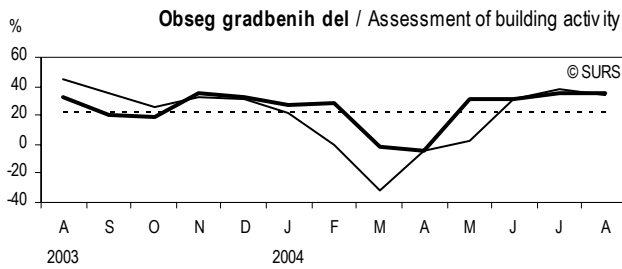


— stavbe buildings      — gradbeništvo construction      - - - - povprečje average

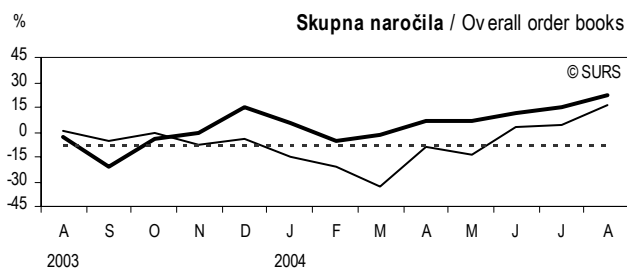
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.  
2) Že začeto ali s pogodbi dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts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

## 3.2 Gibanje ekonomskih kazalcev glede na vrsto gradbenih objektov, stanovanjske stavbe, avgust 2003 - avgust 2004

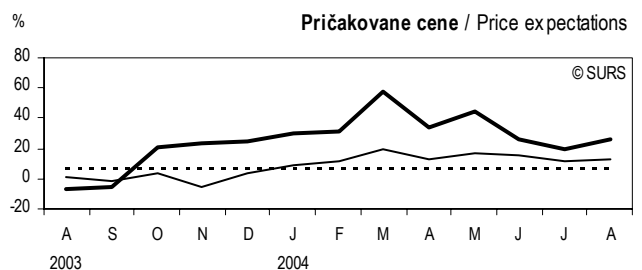
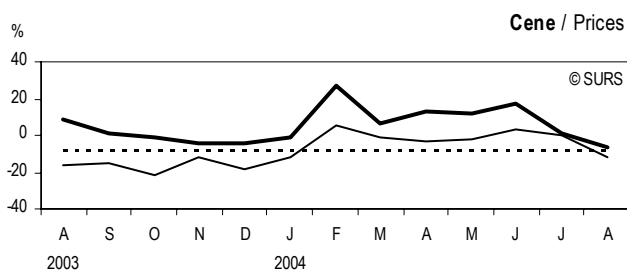
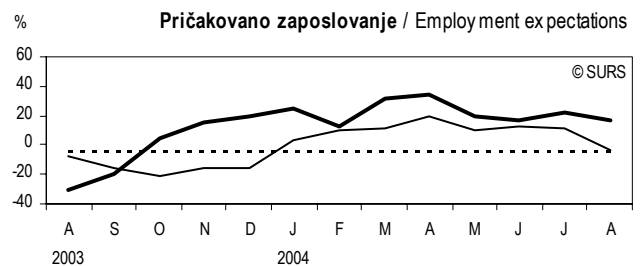
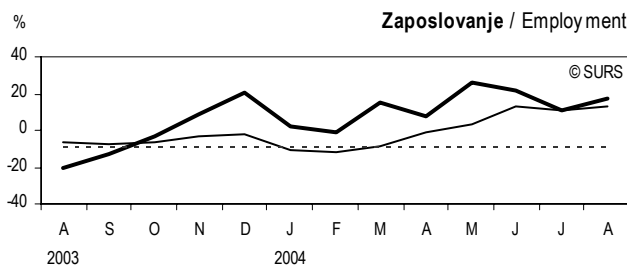
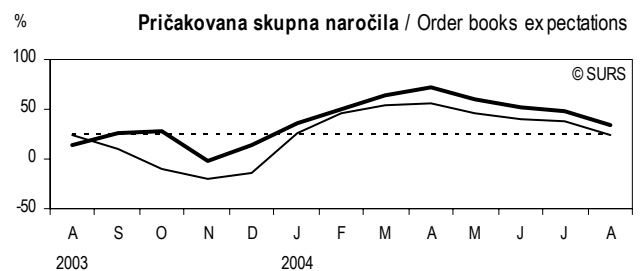
Evolution of economic indicators by the type of construction, residential buildings, August 2003 - August 2004



**Ocena stanj**  
Appreciation of situation



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

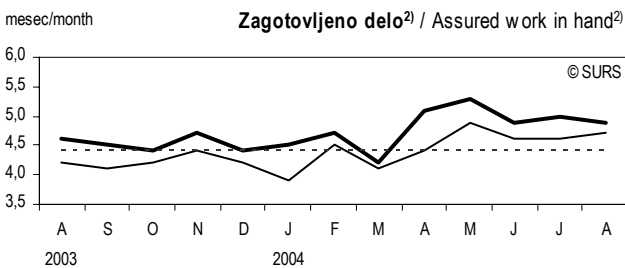
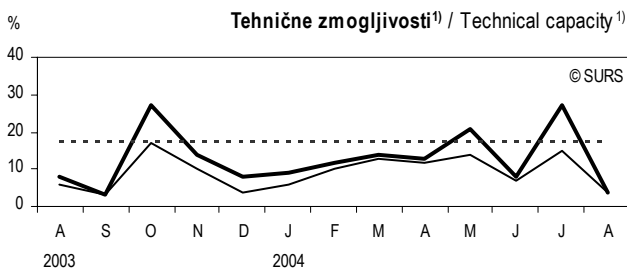
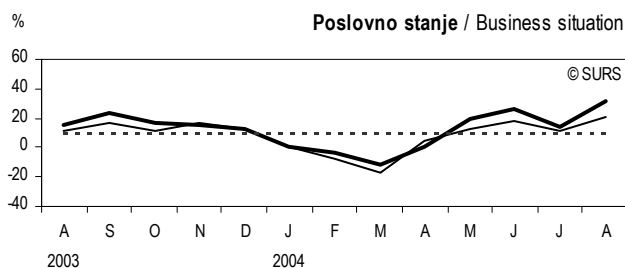
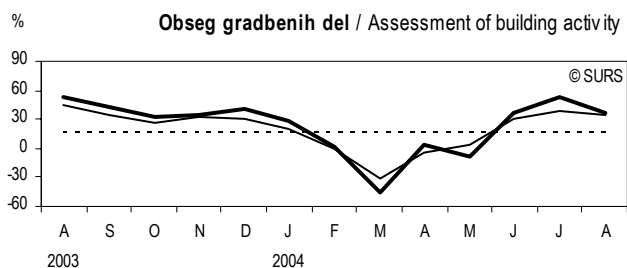


— stanovanjske stavbe residential buildings      — gradbeništvo construction      - - - - povprečje average

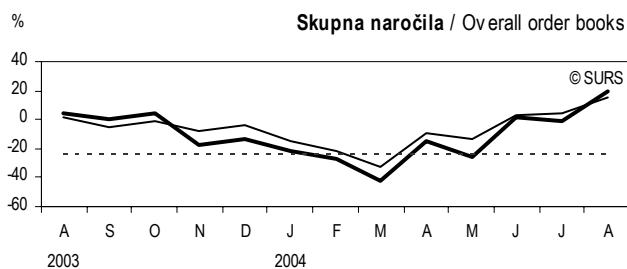
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.  
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts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

### 3.3 Gibanje ekonomskih kazalcev glede na vrsto gradbenih objektov, gradbeni inženirski objekti, avgust 2003 - avgust 2004

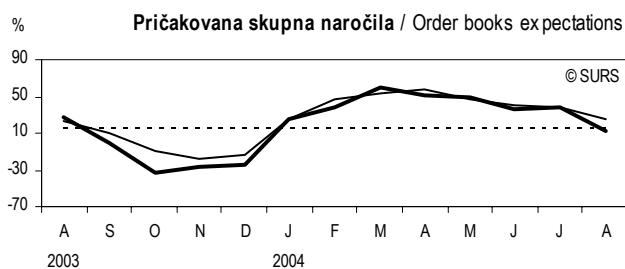
Evolution of economic indicators by the type of construction, civil engineering, August 2003 - August 2004



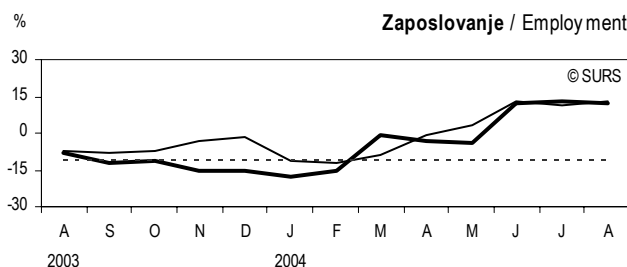
**Ocena stanja**  
Appreciation of situation



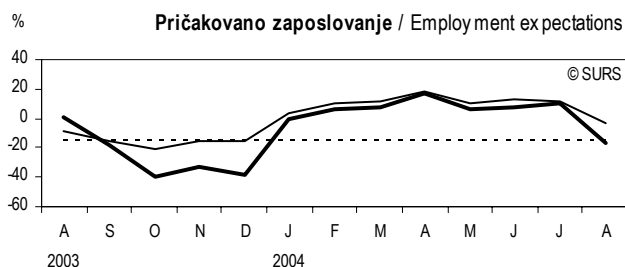
**Pričakovanja v naslednjih 3 mesecih**  
Expectations over the next 3 months



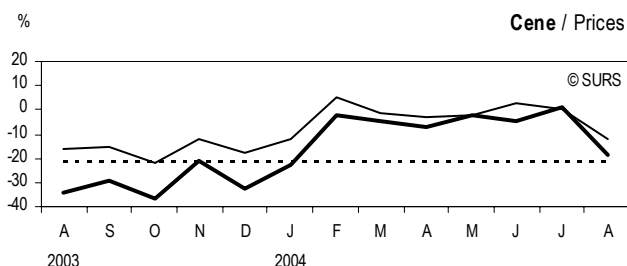
**Zaposlovanje / Employment**



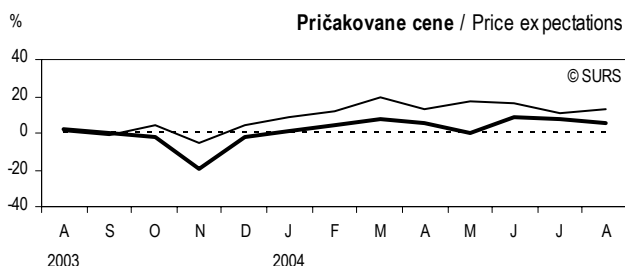
**Pričakovano zaposlovanje / Employment expectations**



**Cene / Prices**



**Pričakovane cene / Price expectations**

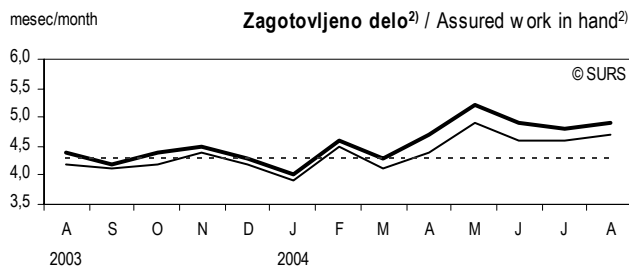
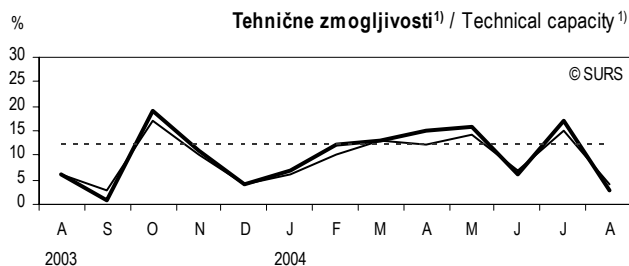
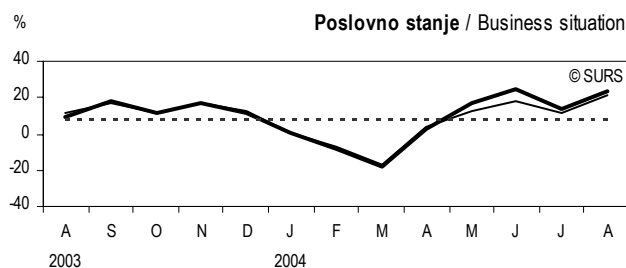
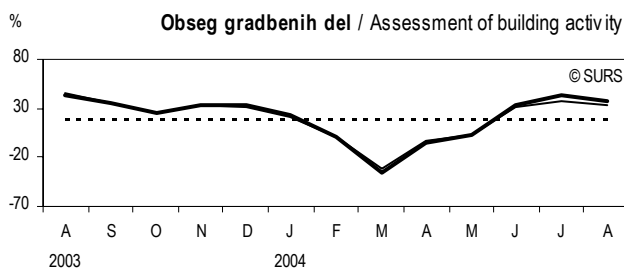


— gradbeni inženirski objekti / civil engineering      — gradbeništvo / construction      - - - - - povprečje / average

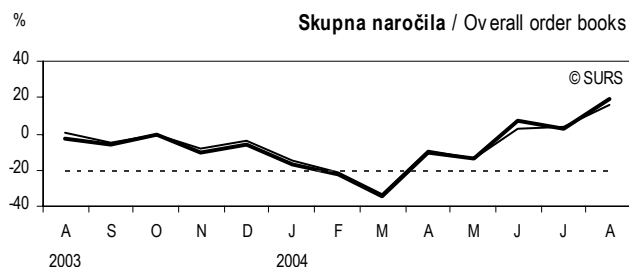
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.  
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts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

## 4.1 Gibanje ekonomskih kazalcev v podjetjih z dejavnostjo gradnja objektov in delov objektov, avgust 2003 - avgust 2004

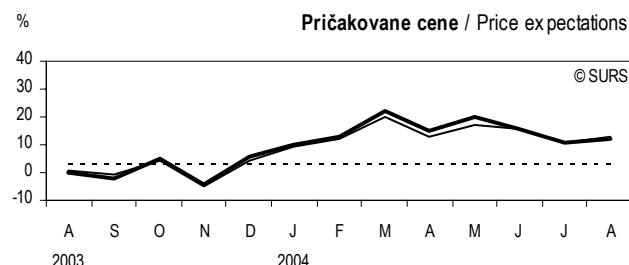
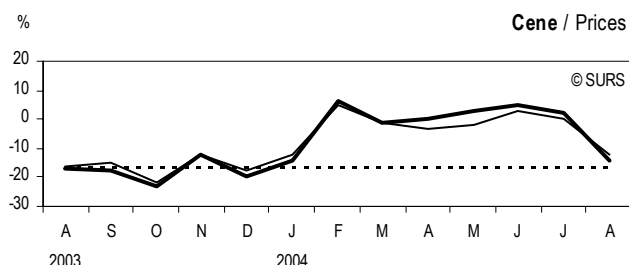
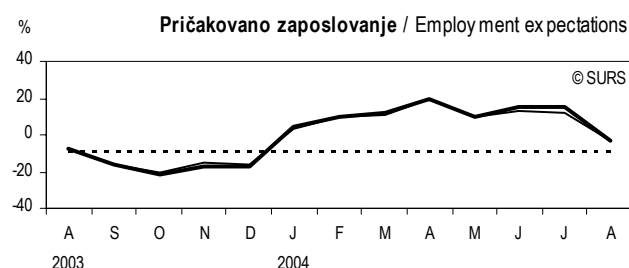
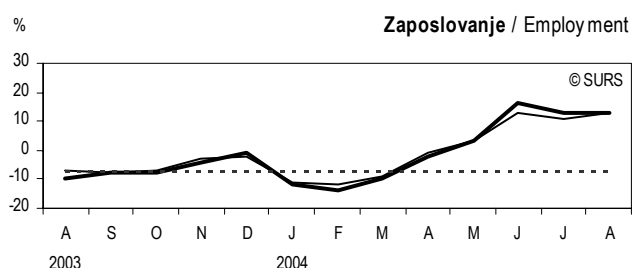
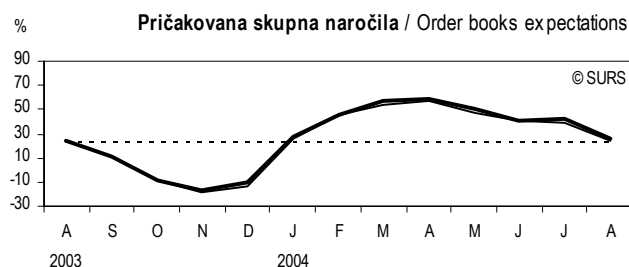
Evolution of economic indicators in enterprises engaged in construction works, August 2003 - August 2004



**Ocena stanj**  
Appreciation of situation



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



— gradnja objektov in delov objektov  
construction works

— gradbeništvo  
construction

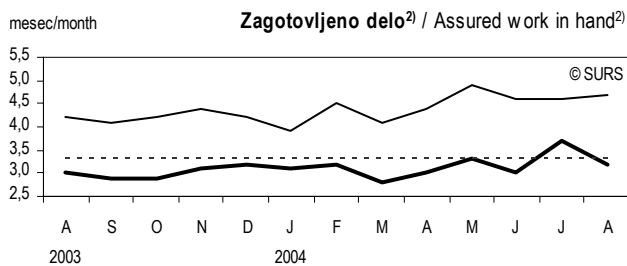
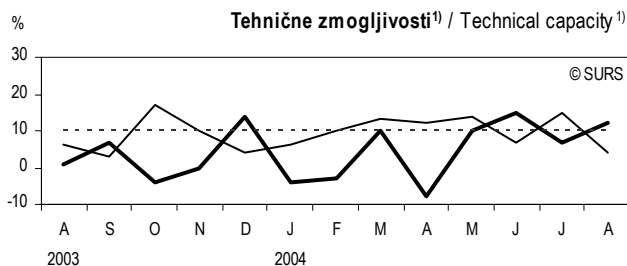
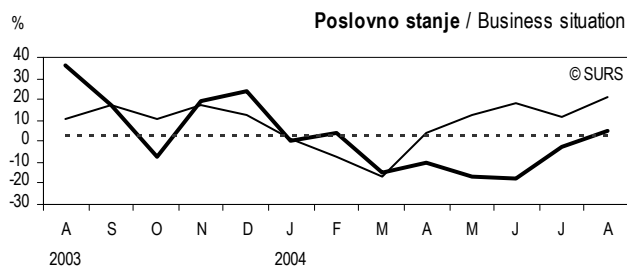
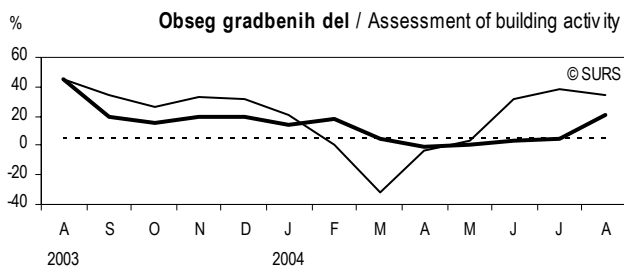
- - - - - povprečje  
average

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.

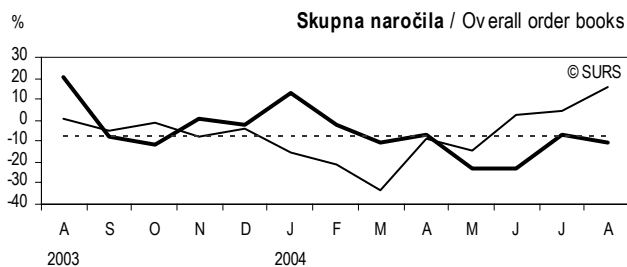
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

#### 4.2 Gibanje ekonomskih kazalcev v podjetjih z dejavnostjo inštalacije pri gradnjah, avgust 2003 - avgust 2004

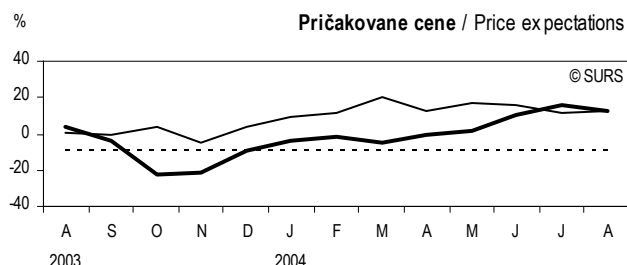
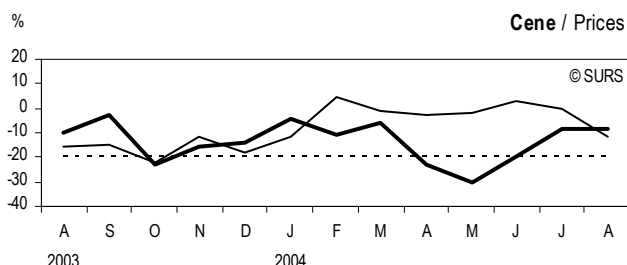
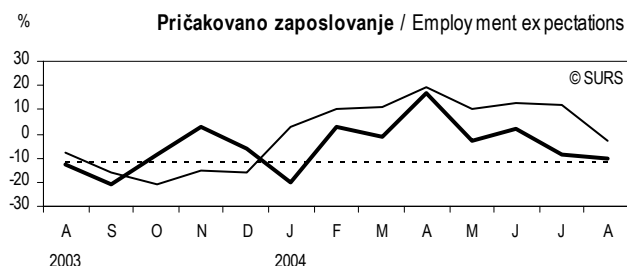
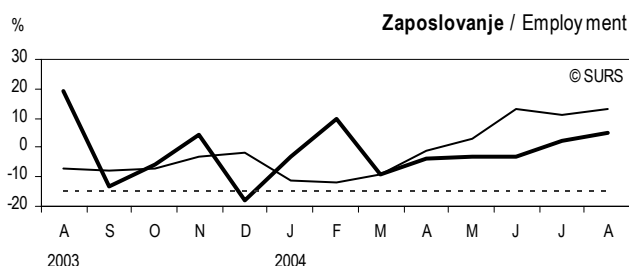
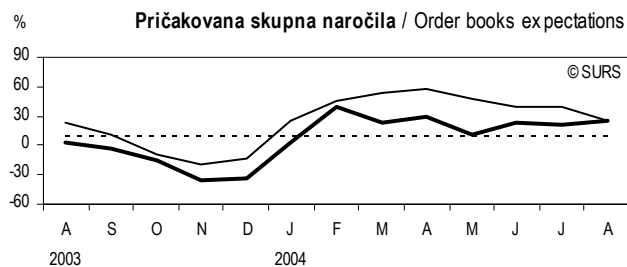
Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, August 2003 - August 2004



**Ocena stanja / Appreciation of situation**



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

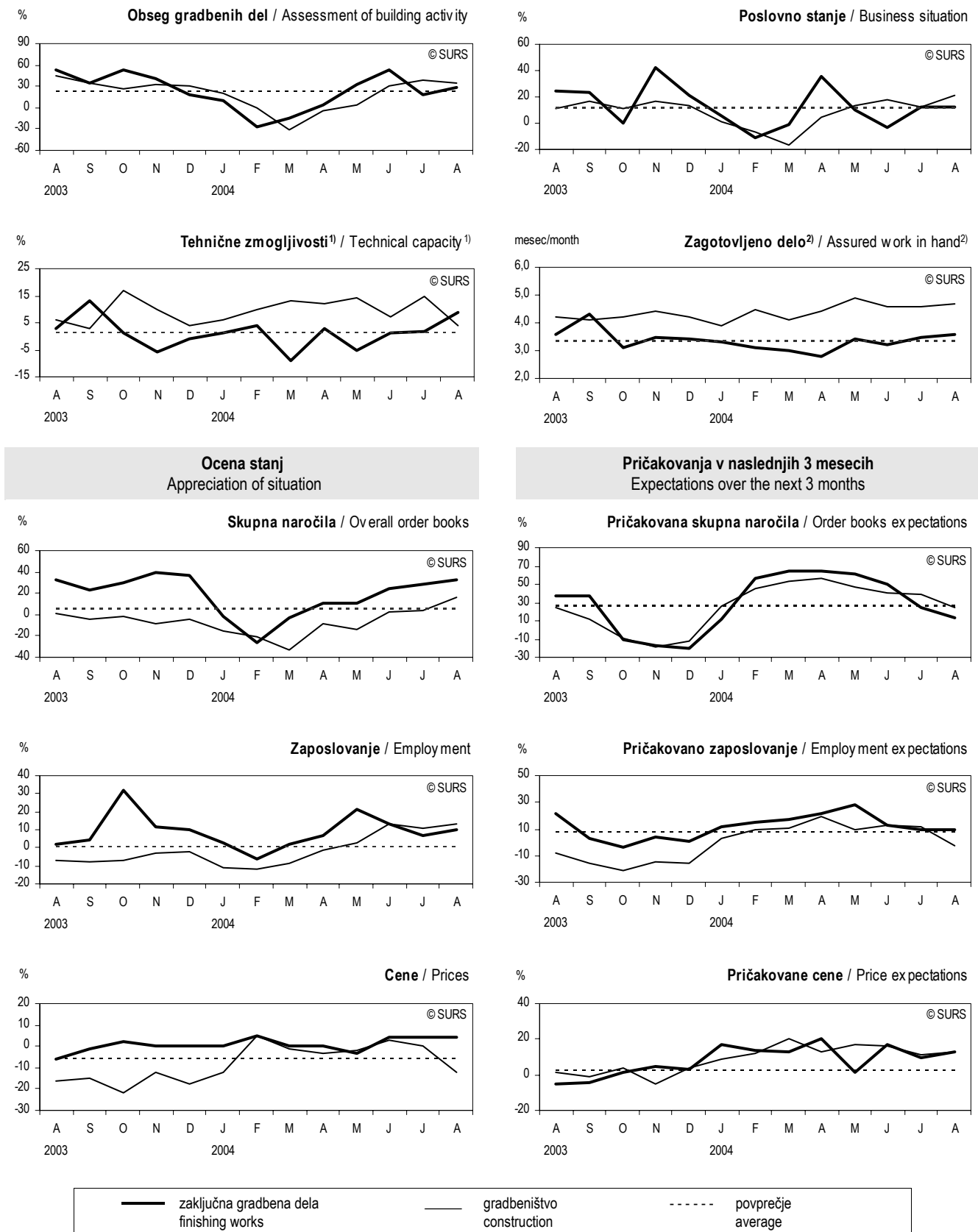


— inštalacije pri gradnjah / installation of equipment and fixtures  
 — gradbeništvo / construction  
 - - - - - povprečje / average

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 v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

## 4.3 Gibanje ekonomskih kazalcev v podjetjih z dejavnostjo zaključna gradbena dela, avgust 2003 - avgust 2004

Evolution of economic indicators in enterprises engaged in finishing works, August 2003 - August 2004



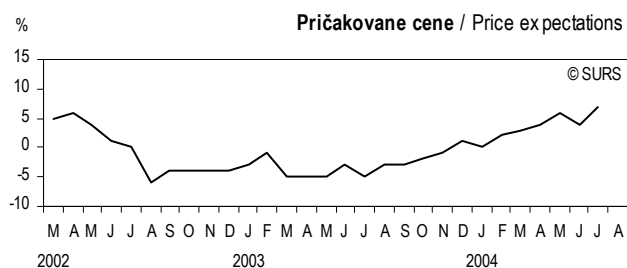
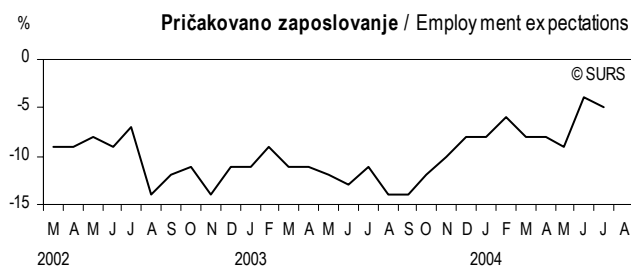
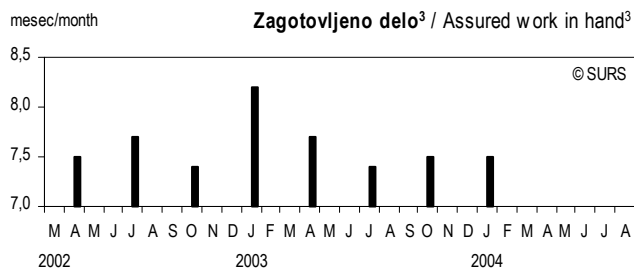
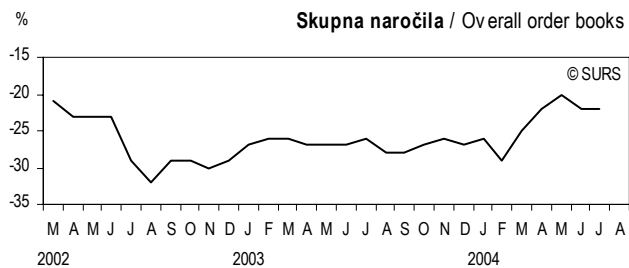
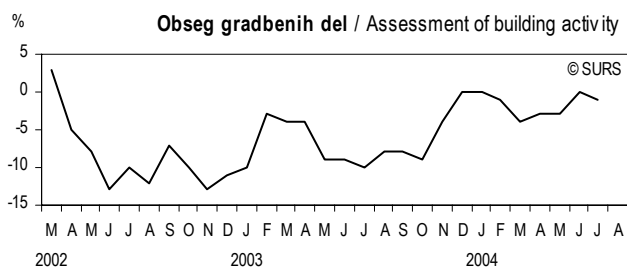
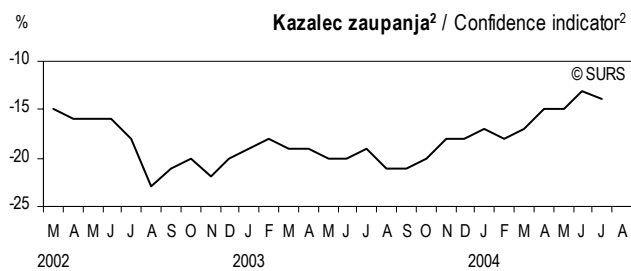
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.



## 5. GIBANJE EKONOMSKIH KAZALCEV V GRADBENIŠTVU V EU, MAREC 2002 - AVGUST 2004<sup>1)</sup>

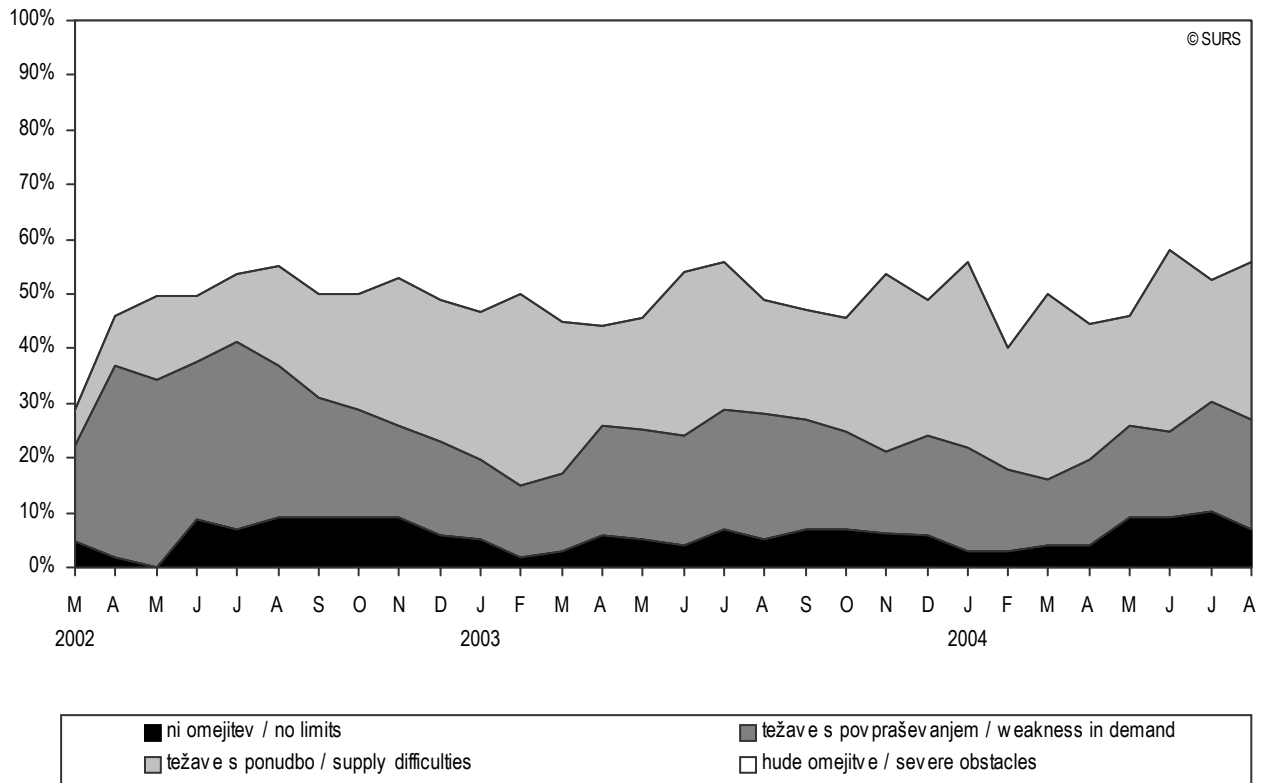
EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN THE EU, MARCH 2002 – AUGUST 2004<sup>1)</sup>



- 1) Podatki o EU za zadnji mesec nam niso na voljo. Podatki so desezonirani. / Data for the EU for the last month are not available. Data are seasonally adjusted.
- 2) Kazalec zaupanja je povprečje ravnotežij na vprašanji o sedanjih skupnih naročilih in pričakovanem zaposlovanju.  
The confidence indicator is an average of balances to questions on overall order books assessments and employment expectations.
- 3) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

## 6. OMEJITVENI DEJAVNIKI V GRADBENIŠTVU V SLOVENIJI, MAREC 2002 - AVGUST 2004

### FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002 - AUGUST 2004



Graf ponazarja delež zaposlenih v gradbeništvu, ki se soočajo z naslednjimi skupinami težav:

- Skupina **"ni omejitev"** zajema zaposlene, ki nimajo omejitev.
- 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 tako z dejavniki iz skupine "šibko povpraševanje" kot tudi 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 kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca 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 Standardne klasifikacije dejavnosti (SKD) 45 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-ju.

### VIRI

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

### ZAJETJE

V anketi sodeluje 400 izbranih gradbenih podjetij. V anketo smo zajeli vsa velika in srednjevelika podjetja in vsa mala podjetja z 11 zaposlenimi in več.

### 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 giba med 5-10 % (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 kazalcev.

## 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

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

### COVERAGE

Approximately 400 enterprises participate in the survey. We included all large and medium-sized enterprises and all small enterprises with 11 employees and more.

### 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 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.



**Kazalec zaupanja** je povprečje odgovorov (ravnotežij) na vprašanja o sedanjih skupnih naročilih in pričakovanemu zaposlovanju.

### OBJAVLJANJE PODATKOV

Sodelujoči v anketi prejmejo informacijo o gradbeništvu 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 gradbeništvu 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?
- V primeru normalnih delovnih ur že začeto ali s pogodbami zagotovljeno dela za: .... mesecev?
- Poslovno stanje v primerjavi s preteklim mesecem: boljše, enako, slabše?

**Confidence indicator** is defined as the arithmetic mean of the answers (balances) to the questions on order book 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 database SI-STAT which is available on the <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?

## KOMENTAR

Avgusta so direktorji ocenili tendence v gradbeništvu slabše kot pretekli mesec. Kazalec zaupanja se je v primerjavi s preteklim mesecem znižal za 1 odstotno točko. Glede na isti mesec lani je bil višji za 11 odstotnih točk, hkrati pa za 16 odstotnih točk nad lanskim povprečjem.

## POSLOVNO STANJE

Ocena poslovnega stanja se je v primerjavi s preteklim mesecem zvišala za 9 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 10 odstotnih točk in 13 odstotnih točk nad lanskim povprečjem.

## OBSEG GRADBENIH DEL

Ocena obsega gradbenih del se je v primerjavi s preteklim mesecem znižala za 4 odstotne točke. V primerjavi z istim mesecem lani je bila nižja za 11 odstotnih točk in 20 odstotnih točk nad povprečjem lanskega leta.

## SKUPNA NAROČILA IN PRIČAKOVANA SKUPNA NAROČILA

Vrednost kazalca skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 12 odstotnih točk. Glede na isti mesec lani je bila višja za 15 odstotnih točk in za 28 odstotnih točk nad lanskim povprečjem.

Vrednost kazalca pričakovanih skupnih naročil za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 14 odstotnih točk. Glede na isti mesec lani je bila višja za 1 odstotno točko in 3 odstotne točke nad lanskim povprečjem.

## ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Ocena zaposlovanja se je v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. V primerjavi z istim mesecem lani je bila višja za 20 odstotnih točk in 22 odstotnih točk nad povprečjem lanskega leta.

Ocena pričakovanega zaposlovanja se je v primerjavi s preteklim mesecem znižala za 15 odstotnih točk. Glede na isti mesec lani je bila višja za 5 odstotnih točk in 2 odstotni točki nad povprečjem lanskega leta.

## CENE IN CENOVNA PRIČAKOVANJA

Vrednost kazalca cen se je v primerjavi s preteklim mesecem znižala za 12 odstotnih točk. Glede na isti mesec lani je bila višja za 4 odstotne točke in enaka lanskemu povprečju.

Cenovna pričakovanja za naslednje 3 mesece so se v primerjavi s preteklim mesecem zvišala za 2 odstotni točki. V primerjavi z istim mesecem lani so bila višja za 12 odstotnih točk in 8 odstotnih točk nad povprečjem lanskega leta.

## TEHNIČNE ZMOGLJIVOSTI

Vrednost kazalca tehničnih zmogljivosti vključuje oceno količine in kakovosti opreme glede na povpraševanje v naslednjih 12 mesecih.

## COMMENT

In August 2004, managers estimated business tendencies in construction worse than in the previous month. The confidence indicator fell by 1 percentage point compared to the previous month, but rose by 11 percentage points compared to August 2003 and by 16 percentage points compared to last year's average.

## BUSINESS SITUATION

The evaluation of the business situation rose by 9 percentage points compared to the previous month. Compared to August 2003 it was up by 10 percentage points and compared to last year's average by 13 percentage points.

## BUILDING ACTIVITY

The evaluation of the building activity fell by 4 percentage points compared to the previous month. Compared to August 2003 it was down by 11 percentage points while compared to last year's average it was up by 20 percentage points.

## OVERALL ORDERS AND EXPECTED ORDERS

The value of the overall orders indicator rose by 12 percentage points compared to the previous month. Compared to August 2003 it was up by 15 percentage points and compared to last year's average by 28 percentage points.

The value of the expected orders for the next three months fell by 14 percentage points compared to the previous month. Compared to August 2003 it was up by 1 percentage point and compared to last year's average by 3 percentage points.

## EMPLOYMENT AND EXPECTED EMPLOYMENT

The evaluation of the employment indicator rose by 2 percentage points compared to the previous month. Compared to August 2003 it was up by 20 percentage points and compared to last year's average by 22 percentage points.

The evaluation of expected employment fell by 15 percentage points compared to the previous month. Compared to August 2003 it was up by 5 percentage points and compared to last year's average by 2 percentage points.

## PRICES AND PRICE EXPECTATIONS

The value of the prices indicator fell by 12 percentage point compared to the previous month. Compared to August 2003 it was up by 4 percentage points and the same as last year's average.

Price expectations for the next three months rose by 2 percentage points compared to the previous month. Compared to August 2003 they were up by 12 percentage points and compared to last year's average by 8 percentage points.

## TECHNICAL CAPACITY

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



Kazalec se je v primerjavi s preteklim mesecem znižal za 11 odstotnih točk. Glede na isti mesec lani je bil nižji za 2 odstotni točki in 7 odstotnih točk pod povprečjem lanskega leta.

### ZAGOTOVLJENO DELO

Vrednost kazalca zagotavljenega dela vključuje oceno števila mesecev, za katere je delo zagotovljeno s pogodbami.

V avgustu so imela podjetja s pogodbami zagotovljeno delo v povprečju za 4,7 meseca. Vrednost kazalca se je v primerjavi s preteklim mesecem zvišala za 0,1 meseca. Glede na isti mesec lani je bila višja za 0,5 meseca in za 0,6 meseca nad povprečjem lanskega leta.

### OMEJITVENI DEJAVNIKI

Med omejitvenimi dejavniki v gradbeništvu so prevladovali dejavniki iz skupine hude omejitve. V tem mesecu se je z njimi spopadalo 44 % zaposlenih (oziroma 39 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu se je z njimi srečevalo 29 % zaposlenih (oziroma 36 % podjetij).

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 20 % zaposlenih (oziroma 17 % podjetij).

Le 7 % zaposlenih (oziroma 8 % podjetij) v tem mesecu ni imelo omejitev v proizvodnji.

Podrobnejši pregled omejitvenih dejavnikov v gradbeništvu pokaže, da je/so v tem mesecu:<sup>1</sup>

- 52 % podjetij (ali 61 % zaposlenih) omejevala velika konkurenca v dejavnosti;
- 34 % podjetij (ali 34 % zaposlenih) omejevalo pomanjkanje usposobljenih delavcev;
- 33 % podjetij (ali 38 % zaposlenih) omejevali visoki stroški dela;
- 30 % podjetij (ali 38 % zaposlenih) omejevali visoki stroški materiala;
- 20 % podjetij (ali 15 % zaposlenih) omejevali visoki finančni stroški;
- 13 % podjetij (ali 13 % zaposlenih) omejevalo nezadostno povpraševanje;
- 12 % podjetij (ali 11 % zaposlenih) omejevali slabi vremenski pogoji;

Compared to the previous month the indicator fell by 11 percentage points. Compared to August 2003 it was down by 2 percentage points and compared to last year's average by 7 percentage points.

### ASSURED WORK

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

In August 2004, enterprises had work assured for 4.7 months on average. Compared to the previous month the indicator rose by 0.1 month. Compared to August 2003 it was up by 0.5 month and compared to last year's average by 0.6 month.

### LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In August 2004, 44% of employees (39% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In August 2004, 29% of employees (36% of enterprises) faced them.

The third most important obstacles were demand difficulties. In August 2004, 20% of employees (17% of enterprises) faced them.

Only 7% of employees (8% of enterprises) experienced no obstacles in August 2004.

A more detailed overview of factors limiting building activity shows that in May:<sup>1</sup>

- 52% of enterprises (or 61% of employees) were limited by competition in own sector;
- 34% of enterprises (or 34% of employees) were limited by shortage of skilled labour;
- 33% of enterprises (or 38% of employees) were limited by high costs of labour;
- 30% of enterprises (or 38% of employees) were limited by high costs of material;
- 20% of enterprises (or 15% of employees) were limited by high costs of capital;
- 13% of enterprises (or 13% of employees) were limited by insufficient demand;
- 12% of enterprises (or 11% of employees) were limited by bad weather conditions;

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

- 12 % podjetij (ali 6 % zaposlenih) omejevali drugi dejavniki;
- 11 % podjetij (ali 9 % zaposlenih) omejevale težave pri pridobivanju kreditov;
- 8 % podjetij (ali 7 % zaposlenih) ni imelo omejitev;
- 1 % podjetij (ali 4 % zaposlenih) omejevalo pomanjkanje materialov;
- 1 % podjetij (ali 1 % zaposlenih) omejevalo pomanjkanje opreme.

Največja omejitev v gradbeništvu je velika konkurenca v dejavnosti, sledijo vremenski pogoji in visoki stroški materiala.

Le 6 % podjetij v gradbeništvu ni imelo omejitev.

- 12% of enterprises (or 6% of employees) were limited by other factors;
- 11% of enterprises (or 9% of employees) were limited by access to bank credits;
- 8% of enterprises (or 7% of employees) experienced no limits;
- 1% of enterprises (or 4% of employees) were limited by shortage of material;
- 1% of enterprises (or 1% of employees) were limited by lack of equipment.

The most important factor limiting building activity is competition in own sector, followed by weather conditions and high costs of material.

Only 6% of enterprises experienced no limits in building activity.

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