STATISTIČNI URAD REPUBLIKE SLOVENIJE
STATISTICAL OFFICE OF THE REPUBLIC OF SLOVENIA

STATISTIČNE INFORMACIJE
RAPID REPORTS

28. JUNIJ 2006
28 JUNE 2006

Št./No**127**

19 GRADBENIŠTVO
CONSTRUCTION

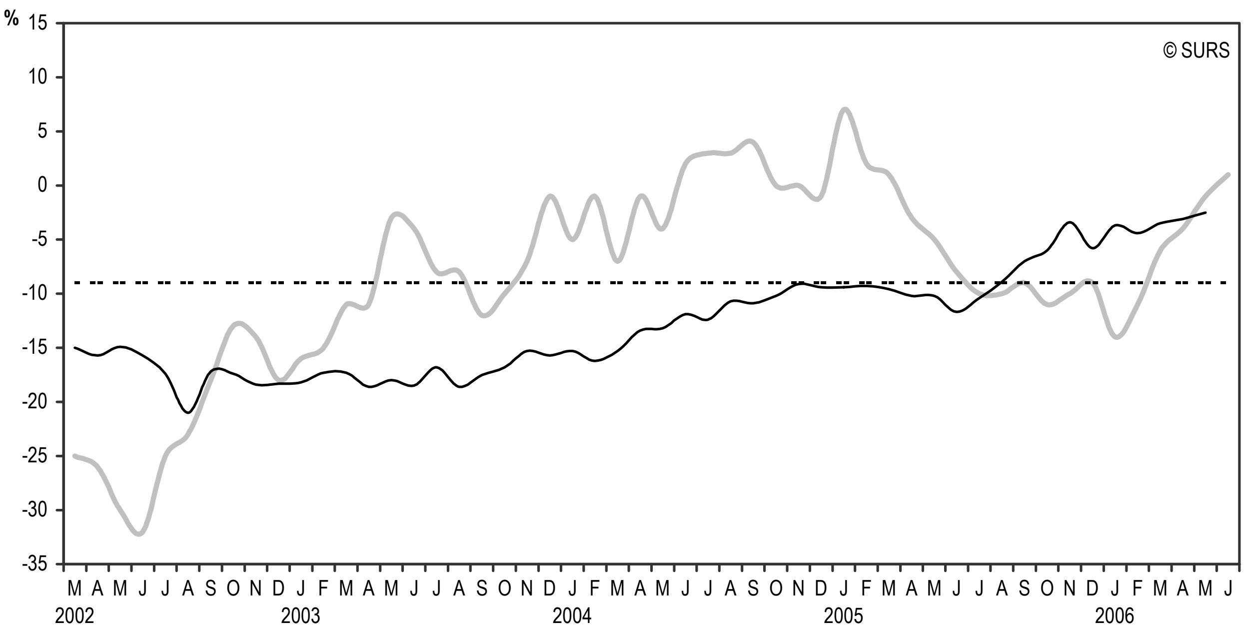
Št./No **13**

POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, JUNIJ 2006
BUSINESS TENDENCY IN CONSTRUCTION, SLOVENIA, JUNE 2006

- Direktorji so poslovne tendence v gradbeništvu ocenili junija 2006 boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 2 odstotni točki višja kot pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 10 odstotnih točk in za 6 odstotnih točk je bila višja od povprečja lanskega leta.
- Na rast kazalnika zaupanja je vplivalo zvišanje skupnih naročil.
- Kazalniki stanj so se v primerjavi s preteklim mesecem izboljšali. Pričakovanja za naslednje tri mesece so ugodna.

- In June 2006, managers estimated business tendencies in construction as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 2 percentage points compared to the previous month. Compared to June 2005 it was up by 10 percentage points and it was 6 percentage points above last year's average.
- The rise of the confidence indicator was influenced by the rise of overall order-books.
- Compared to the previous month, the observed indicators for the appreciation of the situation improved. The expectations for the next three months are favourable.

1. KAZALNIK ZAUPANJA V GRADBENIŠTVU[1)] V SLOVENIJI IN EU[2)], MAREC 2002–JUNIJ 2006
CONSTRUCTION CONFIDENCE INDICATOR[1)] IN SLOVENIA AND EU[2)], MARCH 2002–JUNE 2006



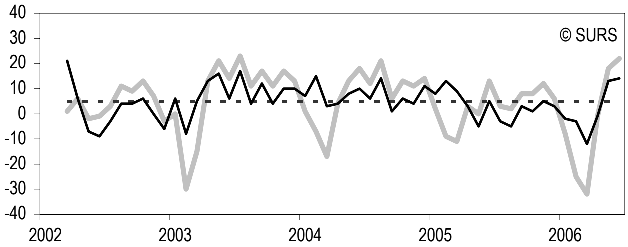
1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanji o sedanjih skupnih naročilih in pričakovanem zaposlovanju. Podatki so desezonirani.
The confidence indicator is an average of responses (balances) to questions on overall order-books assessments and employment expectations. Data are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

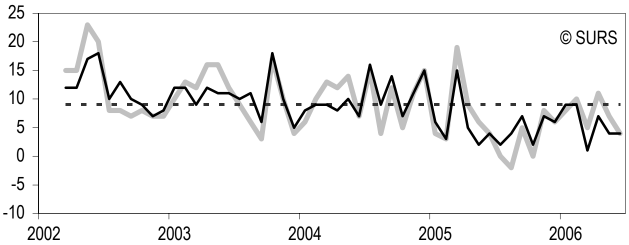
2. GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI, MAREC 2002–JUNIJ 2006
EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA, MARCH 2002–JUNE 2006

% **Obseg gradbenih del** / Assessment of building activity

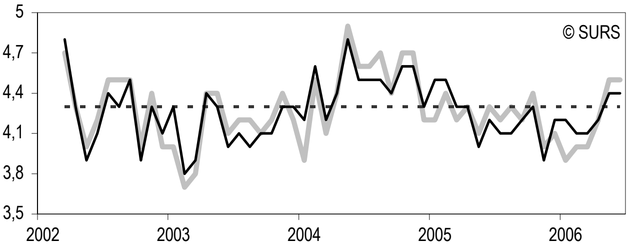
% **Poslovno stanje** / Business situation



% **Tehnične zmogljivosti**[1)] / Technical capacity[1)]

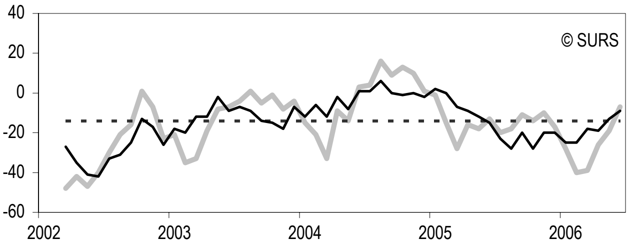


mesec/month **Zagotovljeno delo**[2)] / Assured work in hand[2)]

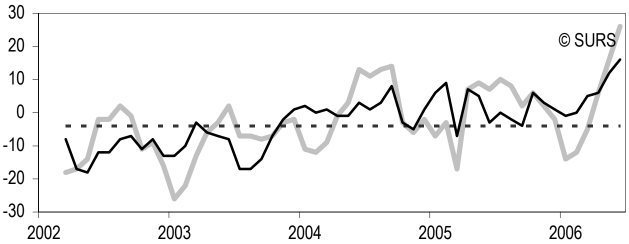


Ocena stanj
Appreciation of situation

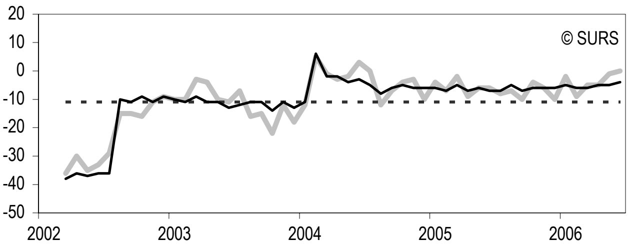
% **Skupna naročila** / Overall order-books



% **Zaposlovanje** / Employment



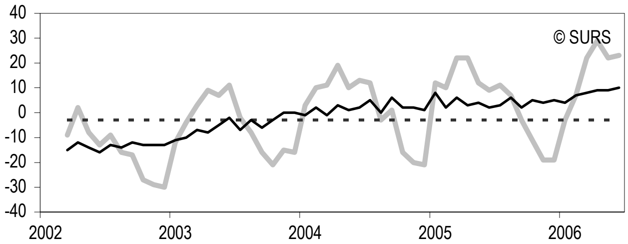
% **Cene** / Prices



Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months

% **Pričakovana skupna naročila** / Order-books expectations

% **Pričakovano zaposlovanje** / Employment expectations



% **Pričakovane cene** / Price expectations

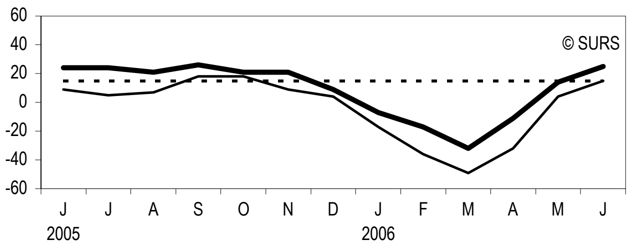
originalni podatki / raw data — desezonirani podatki / seasonally adjusted data — dolgoletno povprečje / long-term average

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.

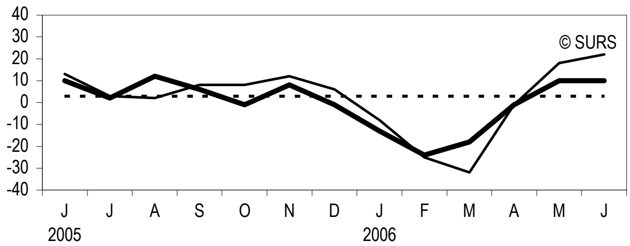
3. GIBANJE EKONOMSKIH KAZALNIKOV GLEDE NA VRSTO GRADBENIH OBJEKTOV, SLOVENIJA, JUNIJ 2005– JUNIJ 2006
EVOLUTION OF ECONOMIC INDICATORS BY THE TYPE OF CONSTRUCTION, SLOVENIA, JUNE 2005– JUNE 2006

3.1 Gibanje ekonomskih kazalnikov za stavbe, Slovenija, junij 2005–junij 2006
Evolution of economic indicators for buildings, Slovenia, June 2005–June 2006

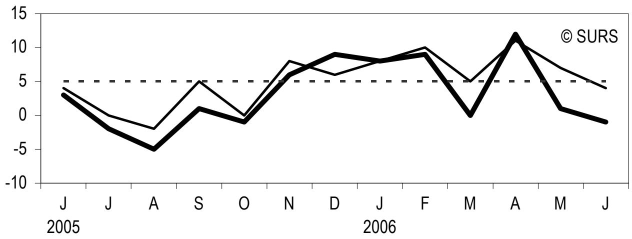
Obseg gradbenih del / Assessment of building activity



Poslovno stanje / Business situation



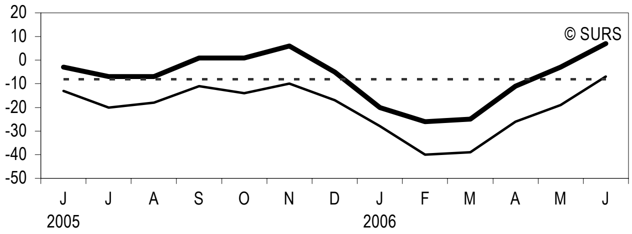
Tehnične zmogljivosti1) / Technical capacity1)



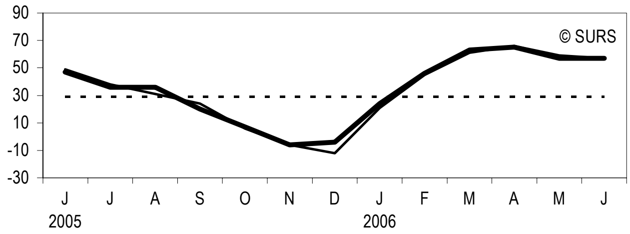
Zagotovljeno delo2) / Assured work in hand2)

Ocena stanj Appreciation of situation	**Pričakovanja v naslednjih 3 mesecih** Expectations over the next 3 months

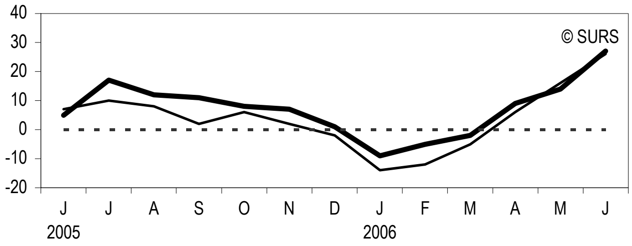
Skupna naročila / Overall order-books



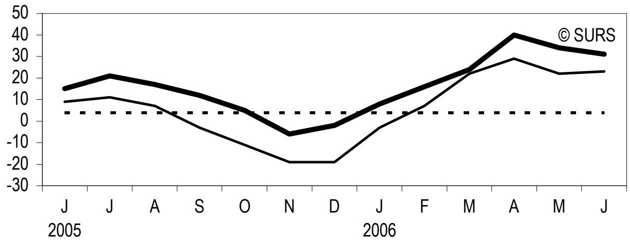
Pričakovana skupna naročila / Order-books expectations



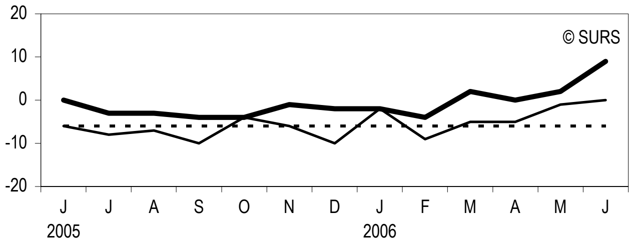
Zaposlovanje / Employment



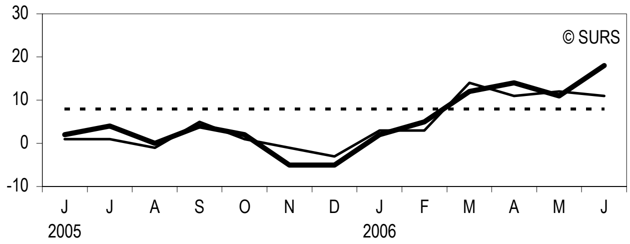
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations



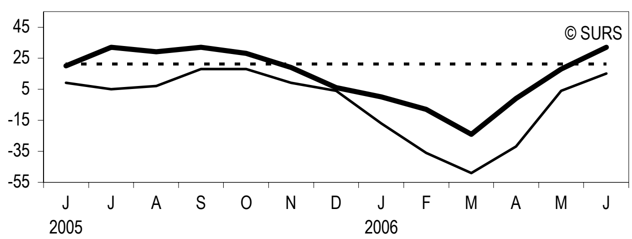
stavbe buildings	gradbeništvo construction	dolgoletno povprečje long-term average

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.

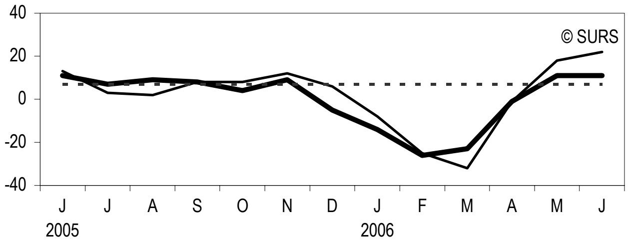
3.2 Gibanje ekonomskih kazalnikov za stanovanjske stavbe, Slovenija, junij 2005–junij 2006

Evolution of economic indicators for residential buildings, Slovenia, June 2005–June 2006

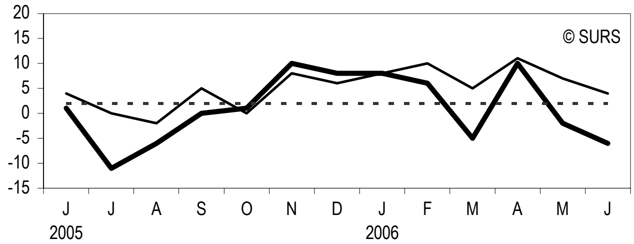
% **Obseg gradbenih del** / Assessment of building activity



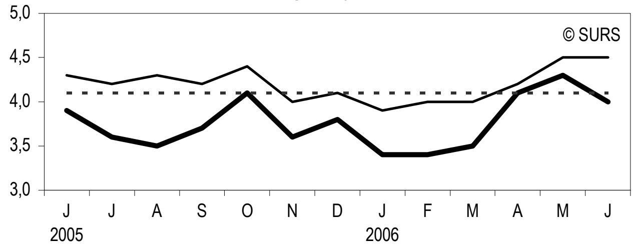
% **Poslovno stanje** / Business situation



% **Tehnične zmogljivosti**1) / Technical capacity1)



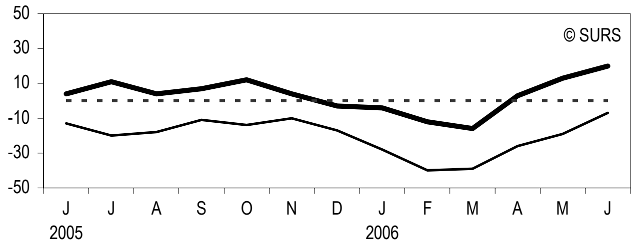
mesec/month **Zagotovljeno delo**2) / Assured work in hand2)



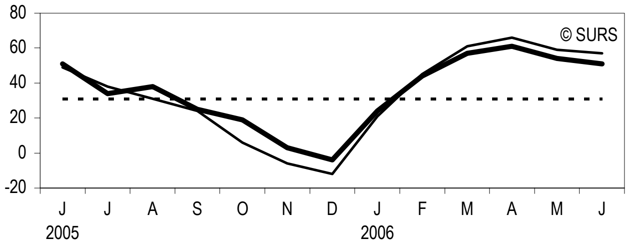
Ocena stanj
Appreciation of situation

Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months

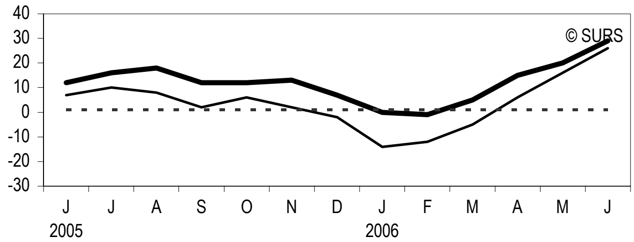
% **Skupna naročila** / Overall order-books



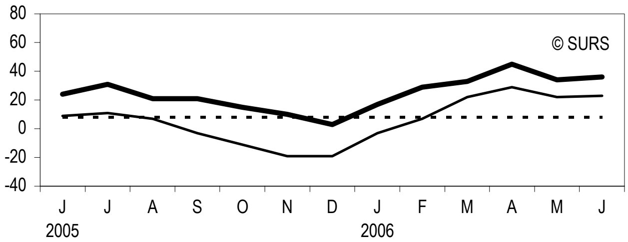
% **Pričakovana skupna naročila** / Order-books expectations



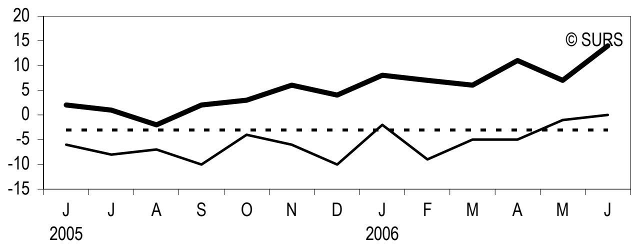
% **Zaposlovanje** / Employment



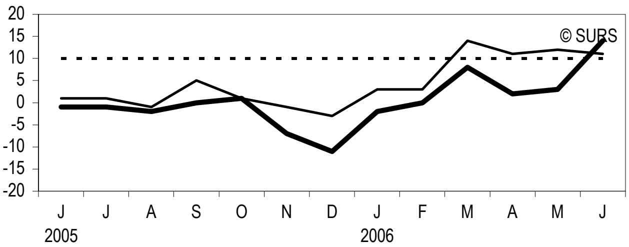
% **Pričakovano zaposlovanje** / Employment expectations



% **Cene** / Prices



% **Pričakovane cene** / Price expectations



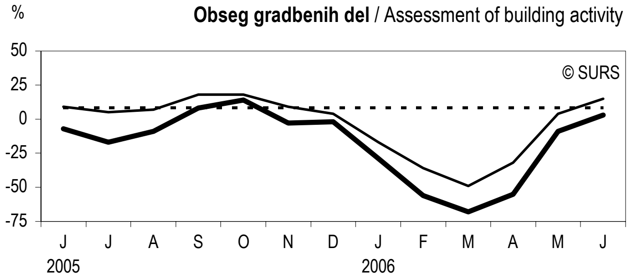
stanovanjske stavbe residential buildings	gradbeništvo construction	dolgoletno povprečje long-term average

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.

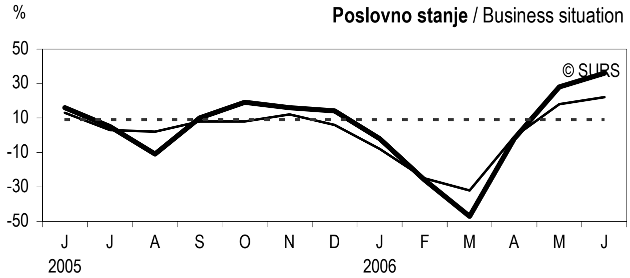
3.3 Gibanje ekonomskih kazalnikov za gradbene inženirske objekte, Slovenija, junij 2005–junij 2006

Evolution of economic indicators for civil engineering, Slovenia, June 2005–June 2006

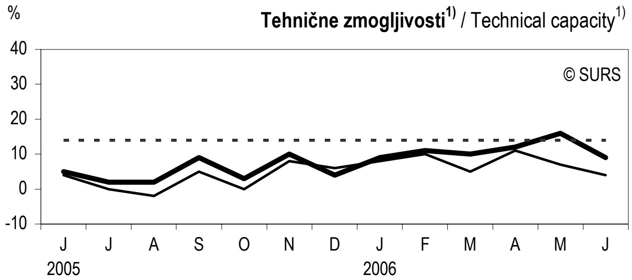
Obseg gradbenih del / Assessment of building activity



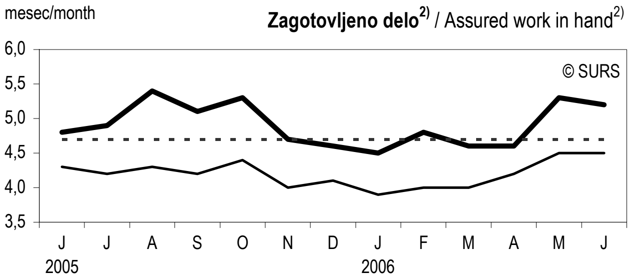
Poslovno stanje / Business situation



Tehnične zmogljivosti[1] / Technical capacity[1]

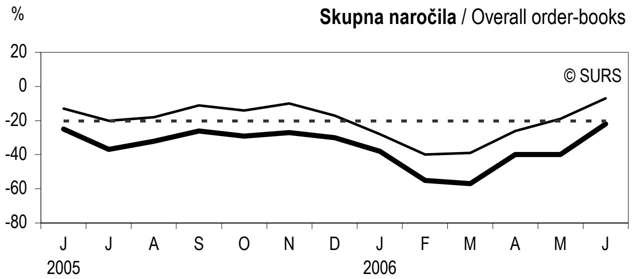


Zagotovljeno delo[2] / Assured work in hand[2]

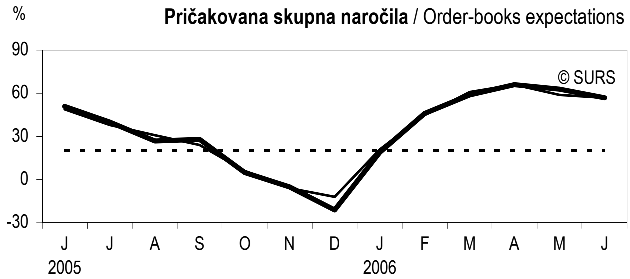


Ocena stanj Appreciation of situation	**Pričakovanja v naslednjih 3 mesecih** Expectations over the next 3 months

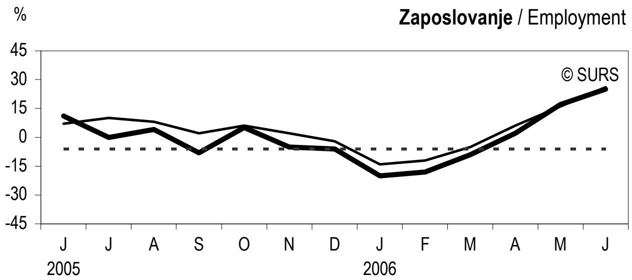
Skupna naročila / Overall order-books



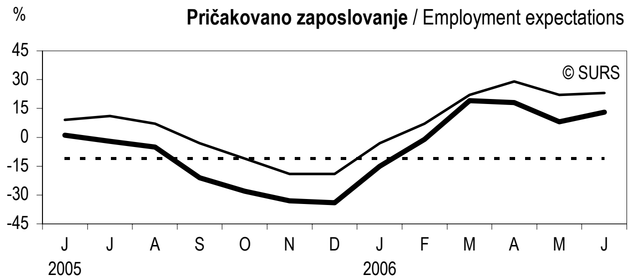
Pričakovana skupna naročila / Order-books expectations



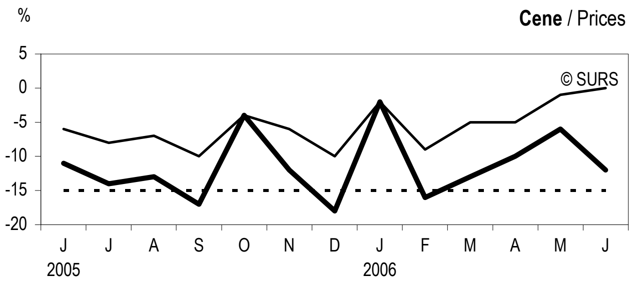
Zaposlovanje / Employment



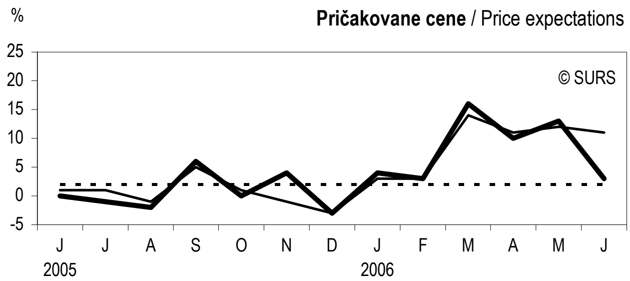
Pričakovano zaposlovanje / Employment expectations



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.

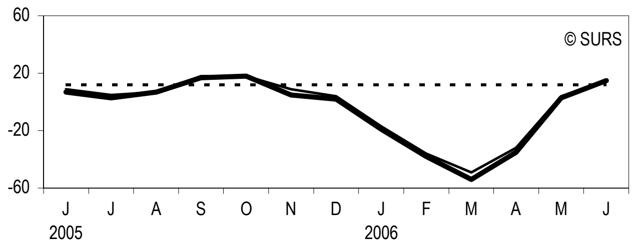
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

4. GIBANJE EKONOMSKIH KAZALNIKOV V PODJETJIH PO DEJAVNOSTIH, SLOVENIJA, JUNIJ 2005–JUNIJ 2006
EVOLUTION OF ECONOMIC INDICATORS IN ENTERPRISES BY ACTIVITY, SLOVENIA, JUNE 2005–JUNE 2006

4.1 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo gradnja objektov in delov objektov, Slovenija, junij 2005–junij 2006
Evolution of economic indicators in enterprises engaged in construction works, Slovenia, June 2005–June 2006

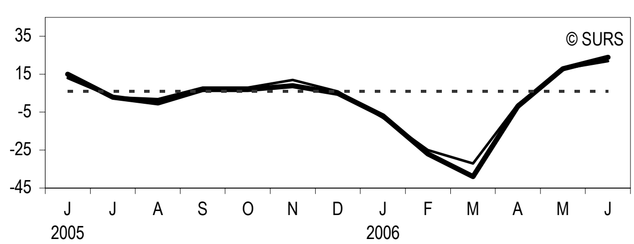
%

Obseg gradbenih del / Assessment of building activity



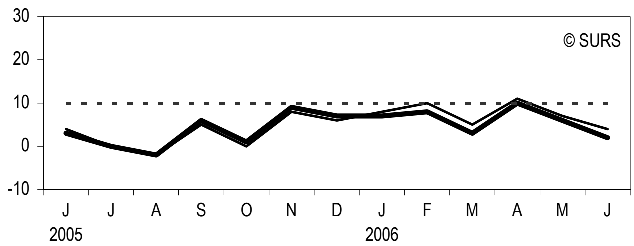
%

Poslovno stanje / Business situation



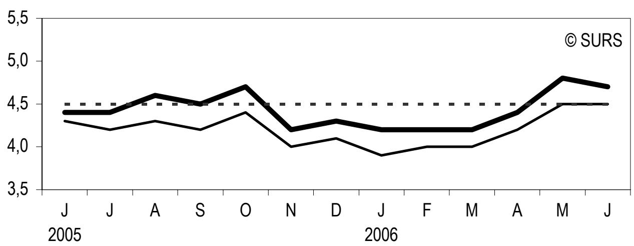
%

Tehnične zmogljivosti[1] / Technical capacity[1]



mesec/month

Zagotovljeno delo[2] / Assured work in hand[2]

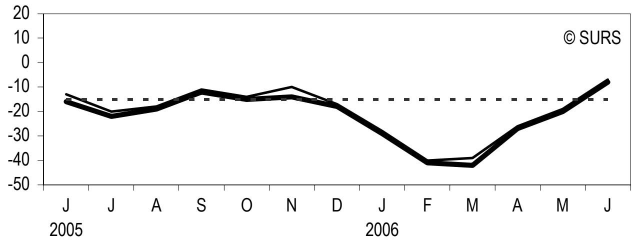


Ocena stanj
Appreciation of situation

Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months

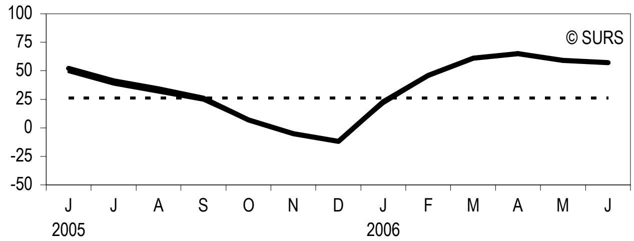
%

Skupna naročila / Overall order-books



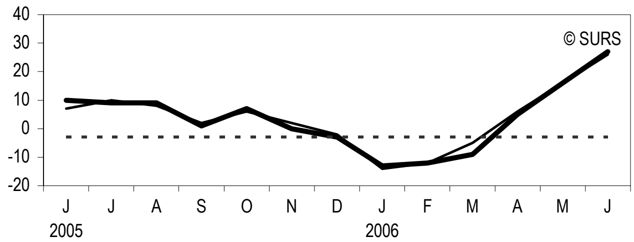
%

Pričakovana skupna naročila / Order-books expectations



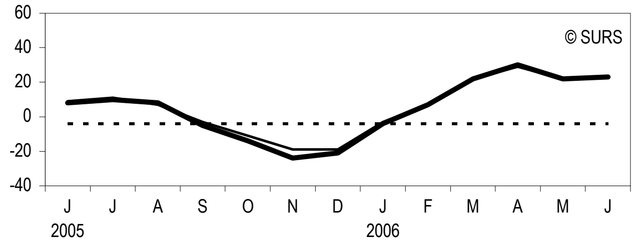
%

Zaposlovanje / Employment



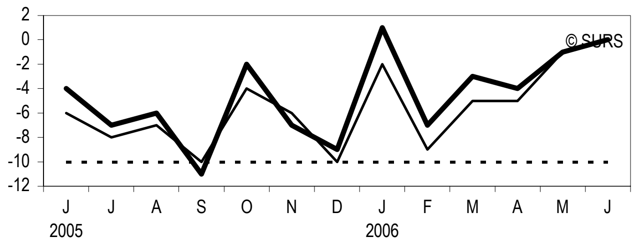
%

Pričakovano zaposlovanje / Employment expectations



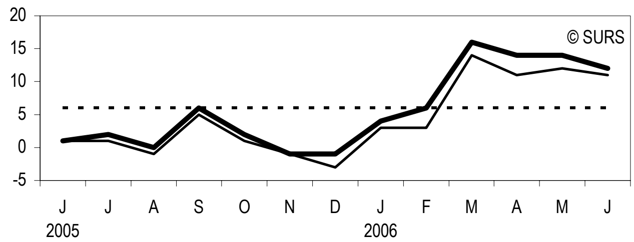
%

Cene / Prices



%

Pričakovane cene / Price expectations



gradnja objektov in delov objektov / construction works
gradbeništvo / construction
dolgoletno povprečje / long-term average

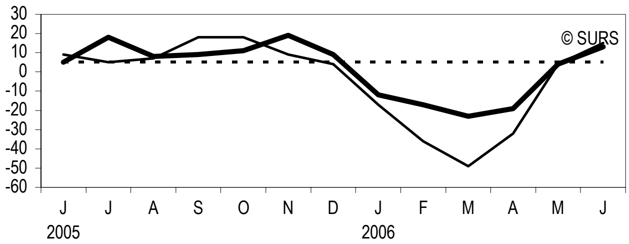
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

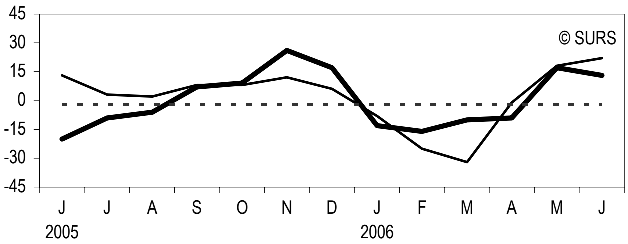
4.2 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo inštalacije pri gradnjah, Slovenija, junij 2005–junij 2006

Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, Slovenia, June 2005–June 2006

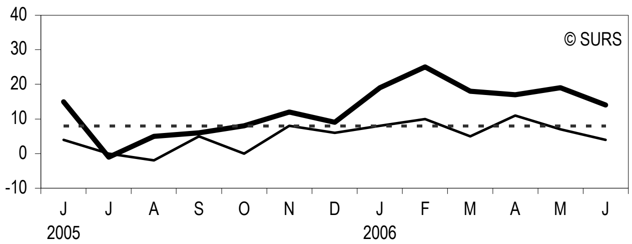
% **Obseg gradbenih del** / Assessment of building activity



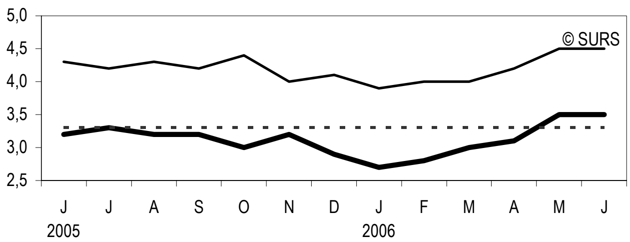
% **Poslovno stanje** / Business situation



% **Tehnične zmogljivosti**[1)] / Technical capacity[1)]



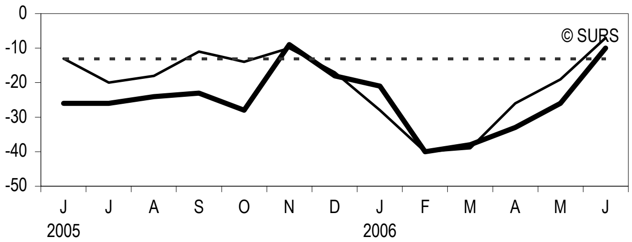
mesec/month **Zagotovljeno delo**[2)] / Assured work in hand[2)]



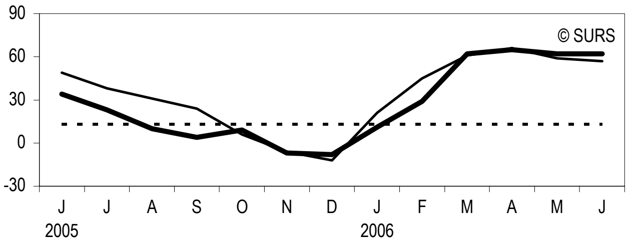
Ocena stanj
Appreciation of situation

Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months

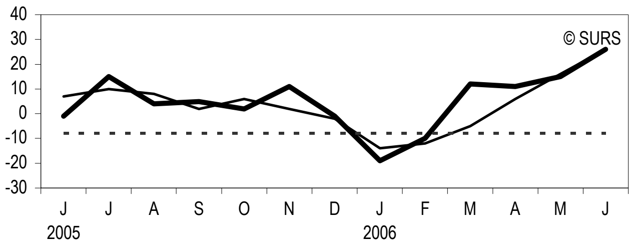
% **Skupna naročila** / Overall order-books



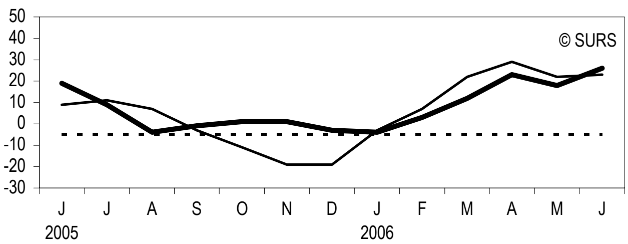
% **Pričakovana skupna naročila** / Order-books expectations



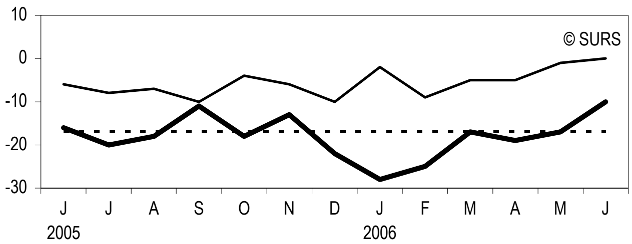
% **Zaposlovanje** / Employment



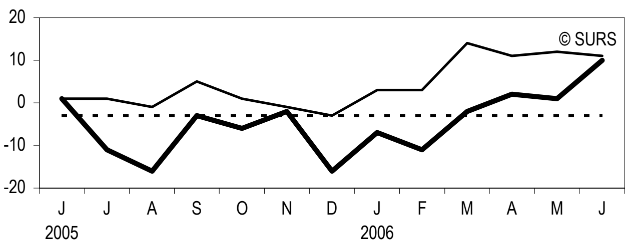
% **Pričakovano zaposlovanje** / Employment expectations



% **Cene** / Prices



% **Pričakovane cene** / Price expectations



inštalacije pri gradnjah installation of equipment and fixtures	gradbeništvo construction	dolgoletno povprečje long-term average

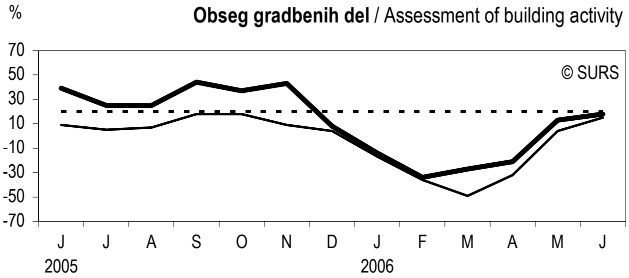
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

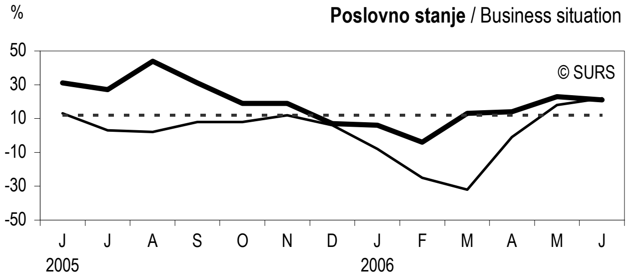
4.3 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo zaključna gradbena dela, Slovenija, junij 2005–junij 2006

Evolution of economic indicators in enterprises engaged in finishing works, Slovenia, June 2005–June 2006

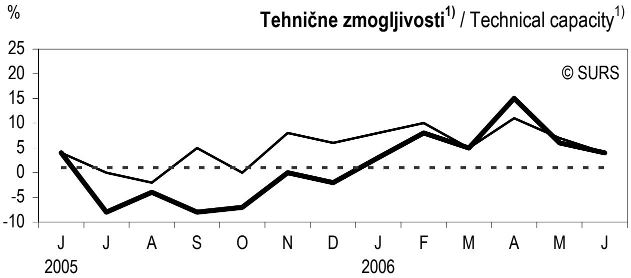
Obseg gradbenih del / Assessment of building activity



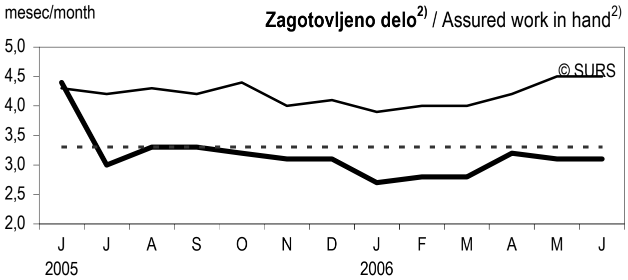
Poslovno stanje / Business situation



Tehnične zmogljivosti[1)] / Technical capacity[1)]



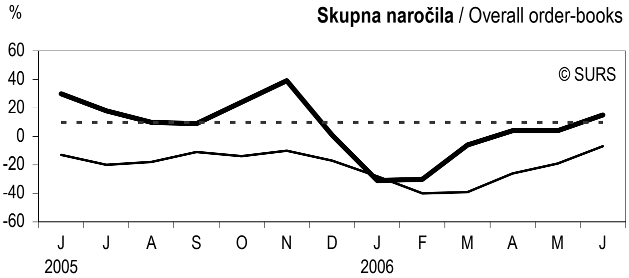
Zagotovljeno delo[2)] / Assured work in hand[2)]



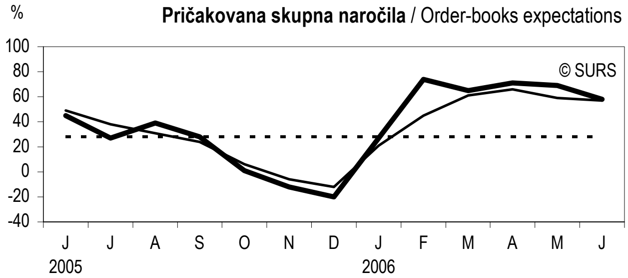
Ocena stanj
Appreciation of situation

Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months

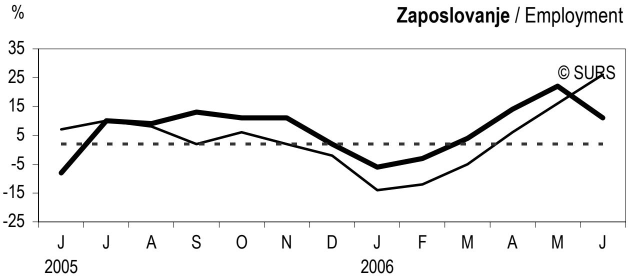
Skupna naročila / Overall order-books



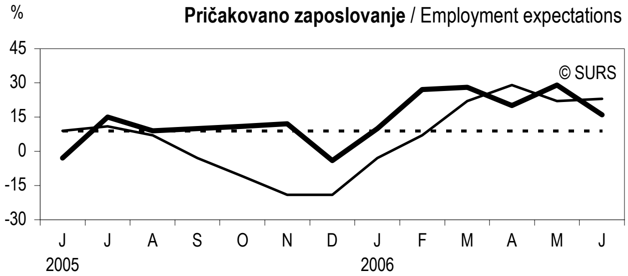
Pričakovana skupna naročila / Order-books expectations



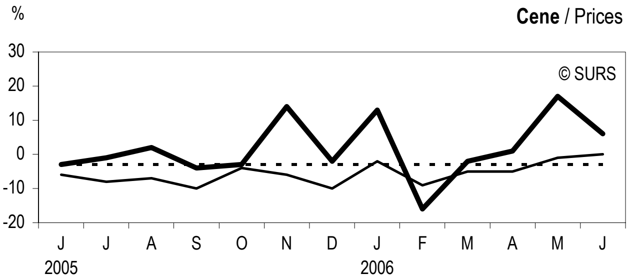
Zaposlovanje / Employment



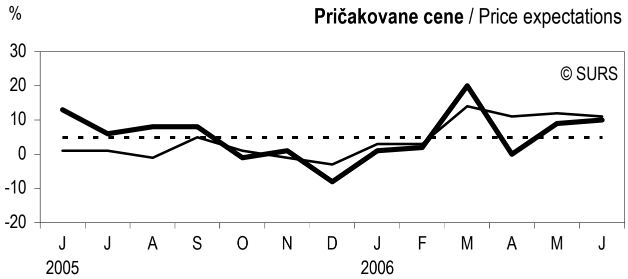
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations



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

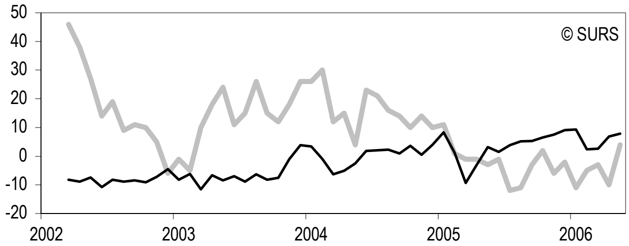
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

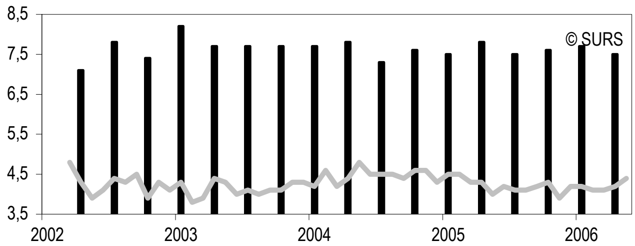
5. GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI IN EU, MAREC 2002–JUNIJ 2006[1)]

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA ANDTHE EU, MARCH 2002–JUNE 2006[1)]

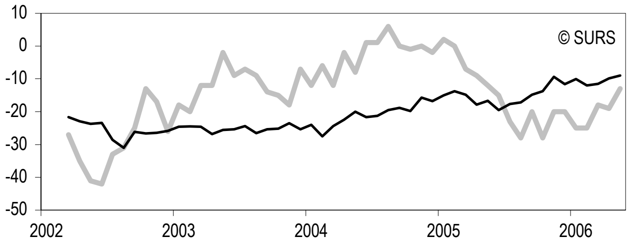
Obseg gradbenih del / Assessment of building activity



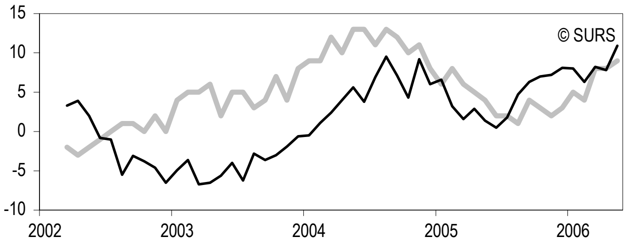
Zagotovljeno delo[2)] / Assured work in hand[2)]



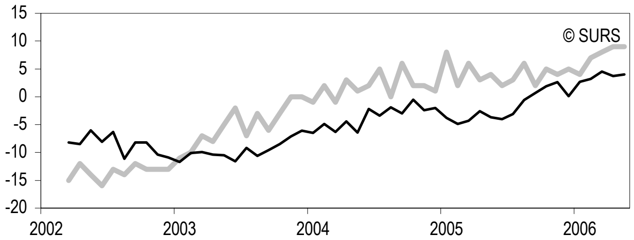
Skupna naročila / Overall order-books



Pričakovane cene / Price expectations



Pričakovano zaposlovanje / Employment expectations

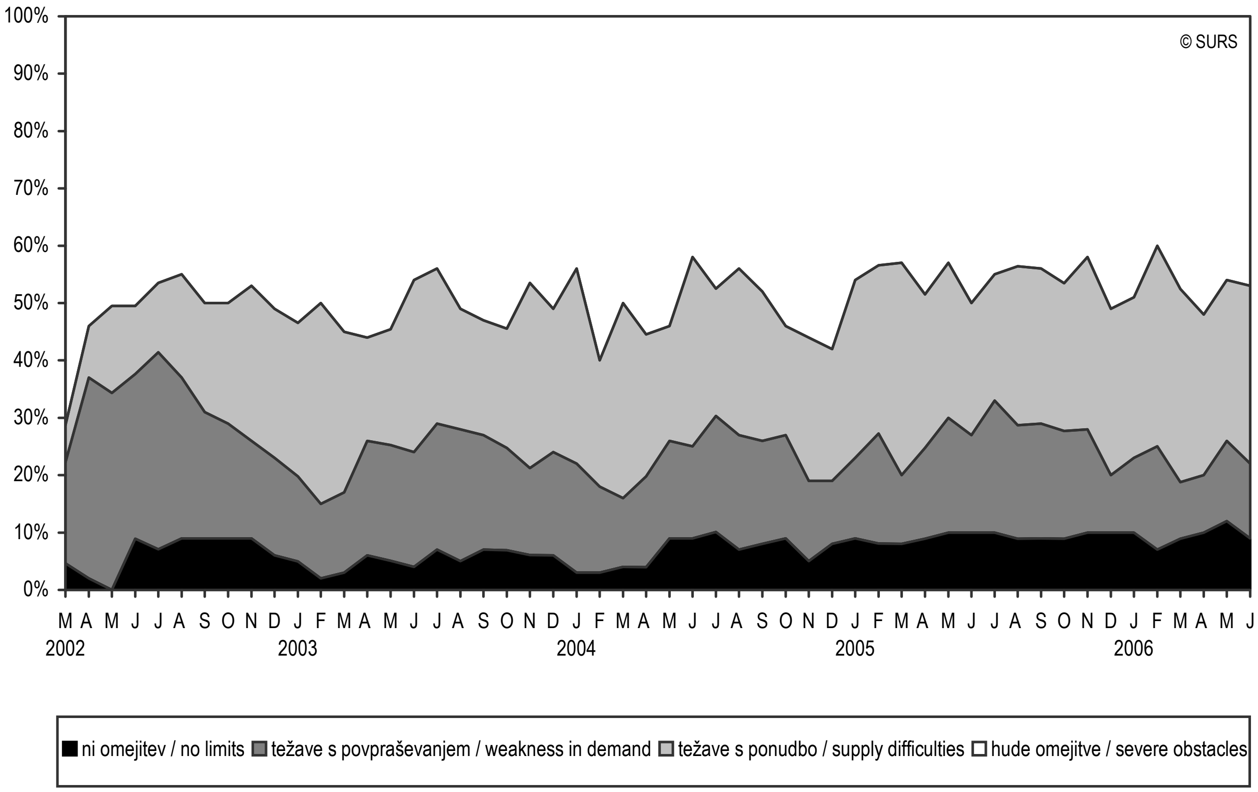


Slovenija / Slovenia — EU

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–JUNIJ 2006
FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002–JUNE 2006



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 gradbeništvo, 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 z EU-jem, so vrednosti **desezonirane**. To so vrednosti, pri katerih je izključen vpliv sezone, vsebujejo pa trend-cikel in naključno komponento. Podatki za EU so desezonirani z metodo DAINTIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na modelih ARIMA. Pri oblikovanju

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 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 component and the irregular component. Data for EU are seasonally adjusted by the DAINTIES method and for Slovenia by the TRAMO/SEATS method, which is based on ARIMA modelov je upoštevano časovno obdobje od marca 2002 do januarja 2006.

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

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.

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.

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.

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 pogodbami zagotovljeno dela za: ... mesecev?
- Poslovno stanje v primerjavi s preteklim mesecem: boljše, enako, slabše?

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

Junija 2006 so direktorji poslovne tendence v gradbeništvu ponovno ocenili boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 2 odstotni točki višja kot pretekli mesec. V primerjavi z istim mesecem lani je bila višja za 10 odstotnih točk in je bila 6 odstotnih točk nad povprečjem lanskega leta.

POSLOVNO STANJE

Desezonirana vrednost kazalnika poslovno stanje je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko. V primerjavi z istim mesecem lani je bila višja za 9 odstotnih točk in za 11 odstotnih točk je bila višja od lanskega povprečja.

OBSEG GRADBENIH DEL

Desezonirana vrednost kazalnika obseg gradbenih del je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko. Glede na isti mesec lani je bila višja za 6 odstotnih točk in za 7 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 4 odstotne točke. Glede na isti mesec lani je bila višja za 6 odstotnih točk in za 6 odstotnih točk je bila višja tudi od lanskega povprečja.

Desezonirana vrednost kazalnika pričakovana skupna naročila za naslednje tri mesece je ostala enaka v primerjavi s preteklim mesecem. Glede na isti mesec lani je bila višja za 8 odstotnih točk in za 8 odstotnih točk je bila višja tudi od povprečja lanskega leta.

ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalnika zaposlovanje se je v primerjavi s preteklim mesecem zvišala za 4 odstotne točke in s tem je dosegla najvišjo vrednost v celotnem opazovanem obdobju. V primerjavi z istim mesecem lani je bila višja za 19 odstotnih točk in za 14 odstotnih točk je bila višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika pričakovano zaposlovanje je bila v primerjavi s preteklim mesecem višja za 1 odstotno točko in s tem je dosegla najvišjo vrednost v celotnem opazovanem obdobju. Glede na isti mesec lani je bila višja za 14 odstotnih točk in za 6 odstotnih točk je bila višja od lanskega povprečja.

CENE IN CENOVNA PRIČAKOVANJA

Desezonirana vrednost kazalnika cene se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 6 odstotnih točk in za 2 odstotni točki višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika cenovna pričakovanja za naslednje tri mesece se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 10 odstotnih točk in za 6 odstotnih točk je bila višja od povprečja lanskega leta.

TEHNIČNE ZMOGLJIVOSTI

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

Desezonirana vrednost kazalnika je ostala enaka v primerjavi s preteklim mesecem. Glede na isti mesec lani je tudi ostala enaka in bila 1 odstotno točko nižja od lanskega povprečja.

COMMENT

In June 2006, managers estimated business tendencies in construction as being better than in the previous month. The seasonally adjusted value of the confidence indicator rose by 2 percentage points compared to the previous month. Compared to June 2005 it was up by 10 percentage points and it was 6 percentage points above last year’s average.

BUSINESS SITUATION

The seasonally adjusted value of the business situation indicator rose by 1 percentage point compared to the previous month. Compared to June 2005 it was up by 9 percentage points and compared to last year’s average by 11 percentage points.

BUILDING ACTIVITY

The seasonally adjusted value of the building activity indicator rose by 1 percentage point compared to the previous month. Compared to June 2005 and last year’s average it was up by 6 and 7 percentage points, respectively.

OVERALL ORDER-BOOKS AND EXPECTED ORDER-BOOKS

The seasonally adjusted value of the overall order-books indicator rose by 4 percentage points compared to the previous month. Compared to June 2005 and last year’s average it was up by 6 percentage points.

The seasonally adjusted value of the expected order-books for the next three months remained the same as in the previous month. Compared to June 2005 and last year’s average it was up by 8 percentage points.

EMPLOYMENT AND EMPLOYMENT EXPECTATIONS

The seasonally adjusted value of the employment indicator rose by 4 percentage points compared to the previous month, which is the best result since we started conducting the survey. Compared to June 2005 it was up by 19 percentage points and compared to last year’s average by 14 percentage points.

The seasonally adjusted value of the expected employment indicator rose by 1 percentage point compared to the previous month, which is the best result since we started conducting the survey. Compared to June 2005 it was up by 14 percentage points and compared to last year’s average by 6 percentage points.

PRICES AND PRICE EXPECTATIONS

The seasonally adjusted value of the prices indicator rose by 1 percentage point compared to the previous month. Compared to June 2005 it was up by 6 percentage points and was 2 percentage points above last year’s average.

The seasonally adjusted value of the price expectations indicator for the next three months rose by 1 percentage point compared to the previous month. Compared to June 2005 it was up by 10 percentage points and 6 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 remained the same as in the previous month. Compared to June 2005 it also remained the same and was 1 percentage point below last year’s average.

ZAGOTOVLJENO DELO

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

V juniju so imela podjetja s pogodbami zagotovljeno delo v povprečju za 4,4 meseca. To je za 0,2 meseca več kot v istem mesecu lani in za 0,2 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 37 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu se je z njimi srečevalo 31 % zaposlenih (oziroma 38 % podjetij).

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 13 % zaposlenih (oziroma 13 % podjetij).

9 % zaposlenih (oziroma 11 % podjetij) v tem mesecu ni imelo omejitev.

Podrobnejši pregled omejitvenih dejavnikov v gradbeništvu v tem mesecu pokaže naslednje[1]:

- 46 % podjetij (ali 57 % zaposlenih) je omejevala velika konkurenca v dejavnosti;
- 38 % podjetij (ali 34 % zaposlenih) je omejevalo pomanjkanje usposobljenih delavcev;
- 33 % podjetij (ali 35 % zaposlenih) so omejevali visoki stroški dela;
- 32 % podjetij (ali 33 % zaposlenih) so omejevale slabe vremenske razmere;
- 24 % podjetij (ali 25 % zaposlenih) so omejevali visoki stroški materiala;
- 12 % podjetij (ali 15 % zaposlenih) je omejevalo nezadostno povpraševanje;
- 14 % podjetij (ali 12 % zaposlenih) so omejevali visoki finančni stroški;
- 10 % podjetij (ali 6 % zaposlenih) so omejevali drugi dejavniki;
- 6 % podjetij (ali 5 % zaposlenih) so omejevale težave pri pridobivanju kreditov;
- 2 % podjetij (ali 2 % zaposlenih) je omejevalo pomanjkanje opreme;
- pomanjkanje materialov podjetij ni omejevalo.

Največja omejitev v gradbeništvu so velika konkurenca v dejavnosti, sledijo pomanjkanje usposobljenih delavcev, slabe vremenske razmere in visoki stroški dela.

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 June 2006, enterprises had work assured for 4.4 months on average, which is 0.2 month more than in June 2005 and 0.2 month more than last year's average.

LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In June 2006, 47% of employees (37% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In June 2006, 31% of employees (38% of enterprises) faced them.

The third most important obstacles were demand difficulties. In June 2006, 13% of employees (13% of enterprises) faced them.

9% of employees (11% of enterprises) experienced no obstacles in June 2006.

A more detailed overview of factors limiting building activity shows that in this month[1]:

- 46% of enterprises (or 57% of employees) were limited by competition in own sector;
- 38% of enterprises (or 34% of employees) were limited by shortage of skilled labour;
- 33% of enterprises (or 35% of employees) were limited by high costs of labour;
- 32% of enterprises (or 33% of employees) were limited by bad weather conditions;
- 24% of enterprises (or 25% of employees) were limited by high costs of material;
- 12% of enterprises (or 15% of employees) were limited by insufficient demand;
- 14% of enterprises (or 12% of employees) were limited by high costs of capital;
- 10% of enterprises (or 6% of employees) were limited by other factors;
- 6% of enterprises (or 5% of employees) were limited by access to bank credits;
- 2% of enterprises (or 2% of employees) were limited by lack of equipment;
- enterprises were not limited by shortage of material.

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

Statistično raziskovanje je sofinancirala Evropska komisija. Za objavljene podatke in besedila je odgovoren izključno Statistični urad Republike Slovenije, in ne Evropska komisija.

The business survey is co-financed by the European Commission. However, the European Commission accepts no responsibility or liability whatsoever with regard to the material published in this publication.

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%.

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Izdaja, založba in tisk Statistični urad Republike Slovenije, Ljubljana, Vožarski pot 12 - **Uporaba in objava podatkov dovoljena le z navedbo vira -** Odgovarja generalna direktorica mag. Irena Križman - Urednica zbirke Statistične informacije Marina Urbas – Področna urednica Brigita Vrabič Kek - Slovensko besedilo jezikovno uredila Ivanka Zobec - Angleško besedilo jezikovno uredil Boris Panič - Naklada 405 izvodov - ISSN zbirke Statistične informacije 1408-192X - ISSN podzbirke Gradbeništvo 1408-9300 - Informacije daje Informacijsko središče, tel. (01) 241 51 04 - El. pošta:info.stat@gov.si - http://www.stat.si.

Edited, published and printed by the Statistical Office of the Republic of Slovenia, Ljubljana, Vožarski pot 12 - **These data can be used provided the source is acknowledged** - Director-General Irena Križman - Rapid Reports editor Marina Urbas – Subject-matter editor Brigita Vrabič Kek - Slovene language editor Ivanka Zobec - English language editor Boris Panič - Total print run 405 copies - ISSN of Rapid Reports 1408-192X - ISSN of subcollection Construction 1408-9300 - Information is given by the Information Centre of the Statistical Office of the Republic of Slovenia, tel.: +386 1 241 51 04 - E-mail: info.stat@gov.si - http://www.stat.si.