



19 GRADBENIŠTVO
CONSTRUCTION

Št./No 31

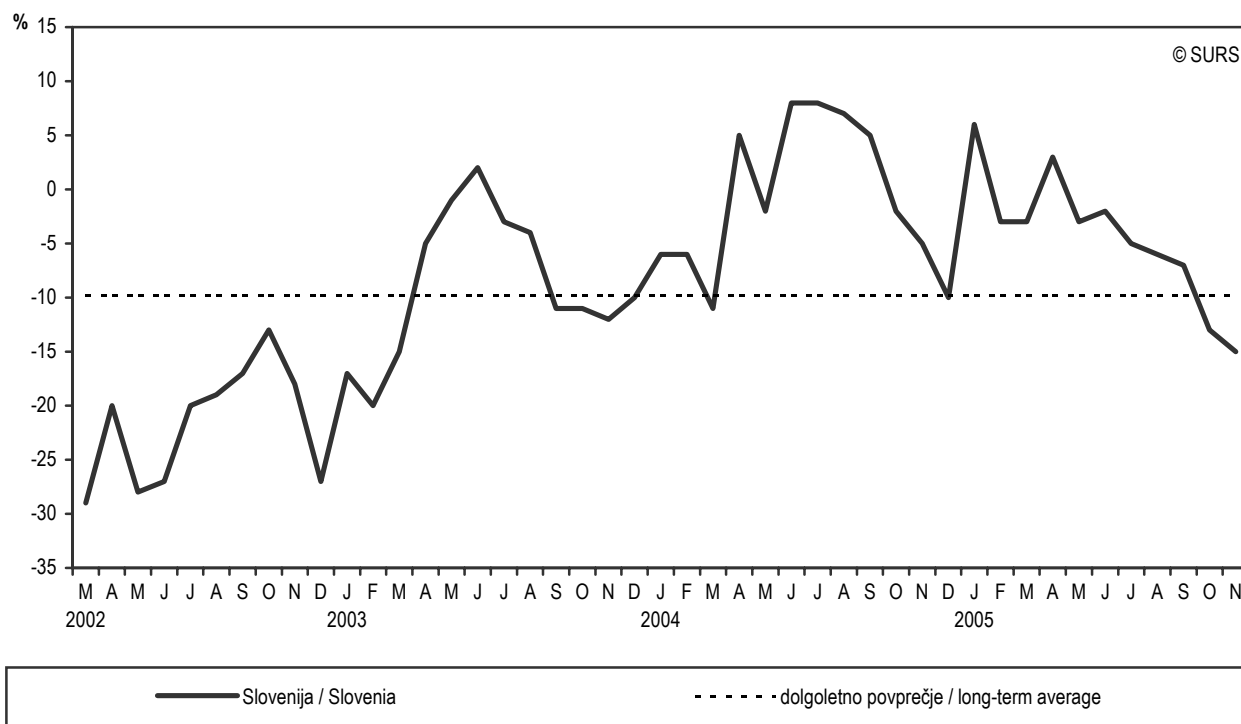
POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, NOVEMBER 2005

BUSINESS TENDENCY IN CONSTRUCTION, SLOVENIA, NOVEMBER 2005

- Vrednost kazalnika zaupanja v gradbeništvu je bila v novembru 2005 za 2 odstotni točki nižja kot v preteklem mesecu. V primerjavi z novembrom lani je bila nižja za 10 odstotnih točk ter za 14 odstotnih točk nižja od lanskega povprečja.
- Na padec kazalnika zaupanja je v novembru 2005 vplivalo znižanje pričakovanega zaposlovanja.
- Kazalniki stanj so se v primerjavi s preteklim mesecem večinoma poslabšali. Pričakovanja za naslednje tri mesece so neugodna.
- In November 2005 the confidence indicator in construction fell by 2 percentage points compared to the previous month. Compared to November 2004 it was down by 10 percentage points and 14 percentage points below last year's average.
- The fall of the confidence indicator in November was influenced by the fall of employment expectations.
- The observed indicators for appreciation of the situation mainly deteriorated compared to the previous month. The expectations for the next three months are unfavourable.

1. KAZALNIK ZAUPANJA V GRADBENIŠTVU ¹⁾ V SLOVENIJI, MAREC 2002 - NOVEMBER 2005

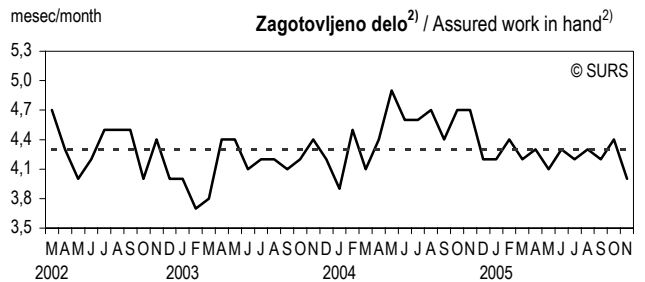
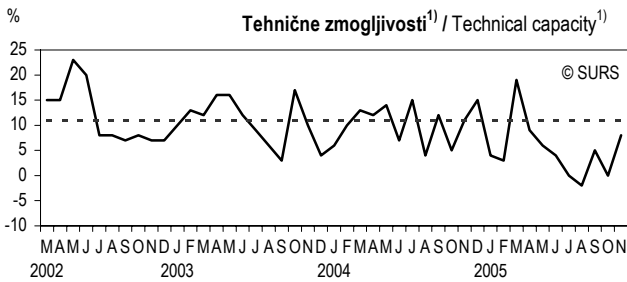
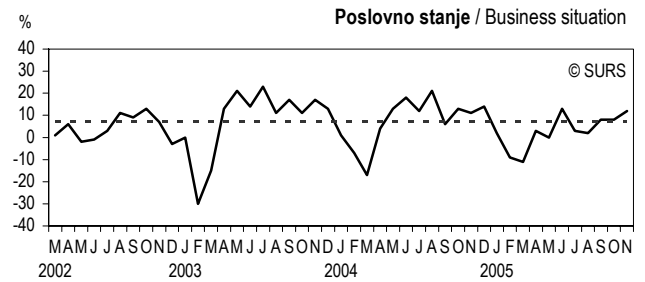
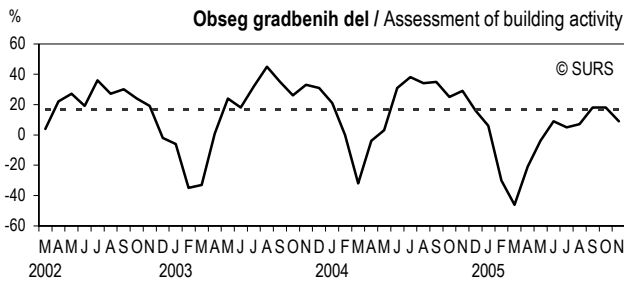
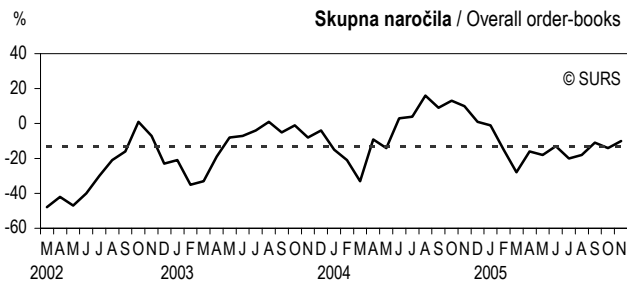
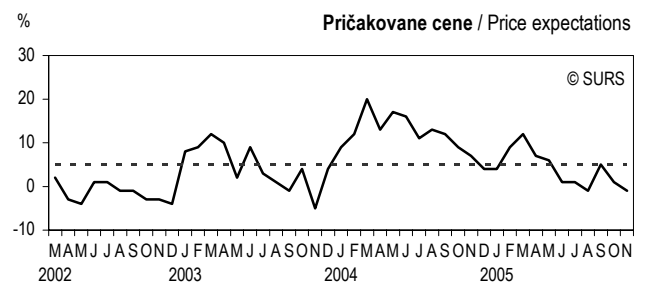
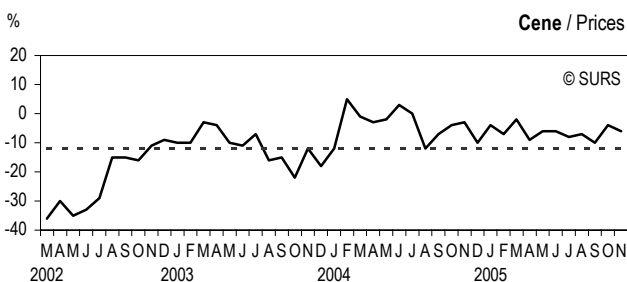
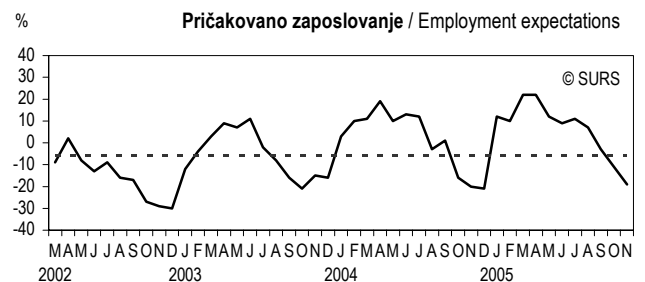
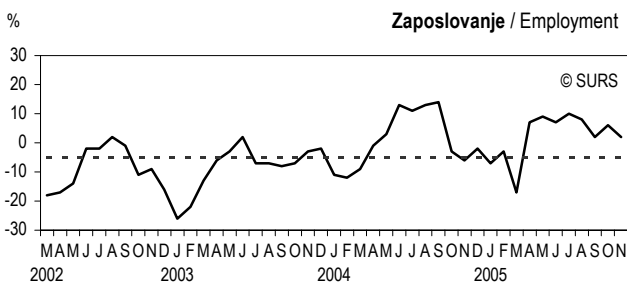
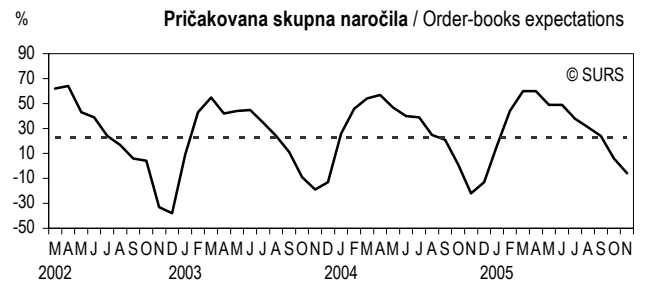
CONSTRUCTION CONFIDENCE INDICATOR ¹⁾ IN SLOVENIA, MARCH 2002 - NOVEMBER 2005



1) Kazalnik 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 KAZALNIKOV V GRADBENIŠTVU V SLOVENIJI, MAREC 2002 - NOVEMBER 2005

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA, MARCH 2002 - NOVEMBER 2005

**Ocena stanja**
Appreciation of situation**Pričakovanja v naslednjih 3 mesecih**
Expectations over the next 3 months— originalni podatki
raw data- - - povprečje
average

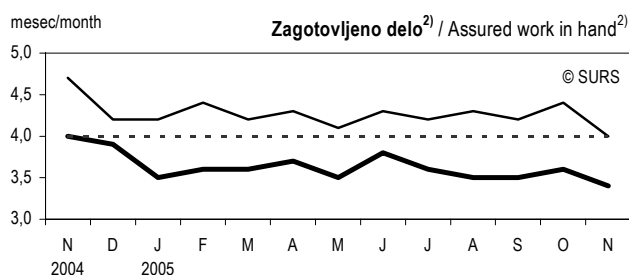
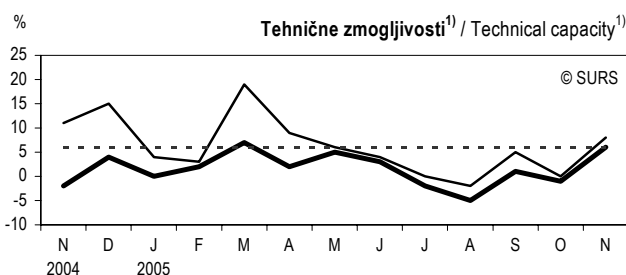
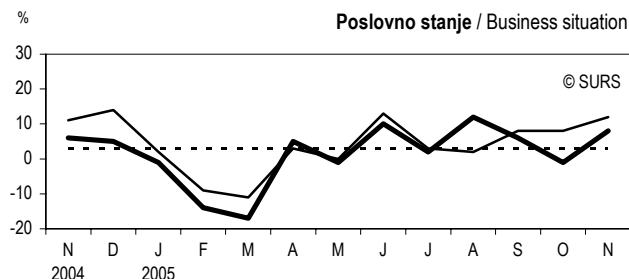
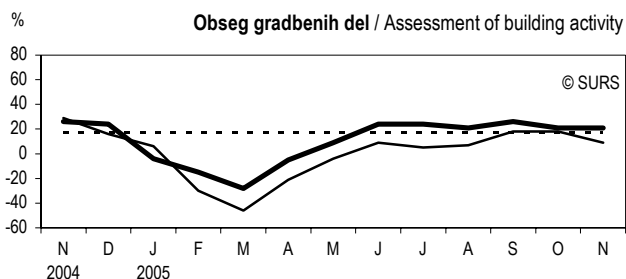
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

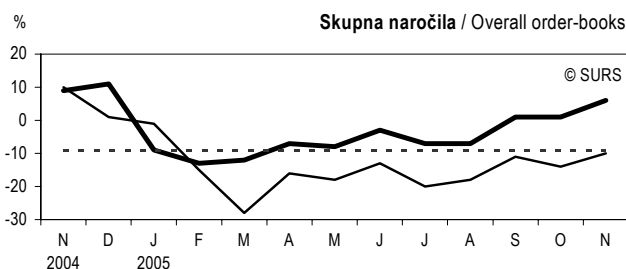


3. GIBANJE EKONOMSKIH KAZALNIKOV GLEDE NA VRSTO GRADBENIH OBJEKTOV, SLOVENIJA, NOVEMBER 2004 - NOVEMBER 2005 EVOLUTION OF ECONOMIC INDICATORS BY THE TYPE OF CONSTRUCTION, SLOVENIA, NOVEMBER 2004 - NOVEMBER 2005

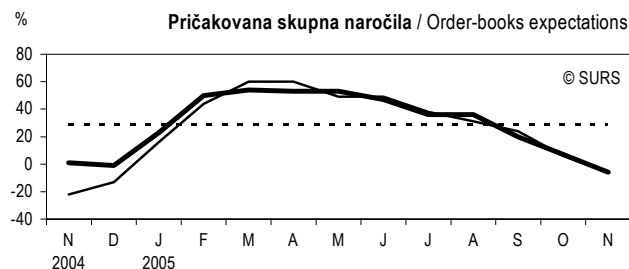
3.1 Gibanje ekonomskih kazalnikov za stavbe, Slovenija, november 2004 - november 2005 Evolution of economic indicators for buildings, Slovenia, November 2004 - November 2005



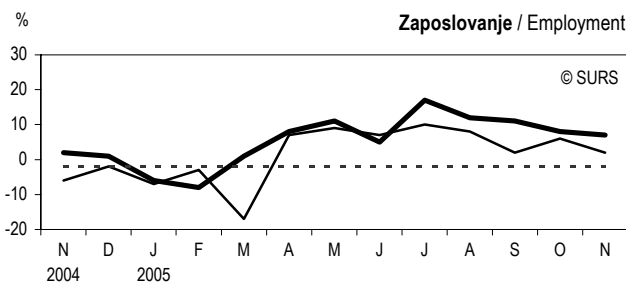
Ocena stanja / Appreciation of situation



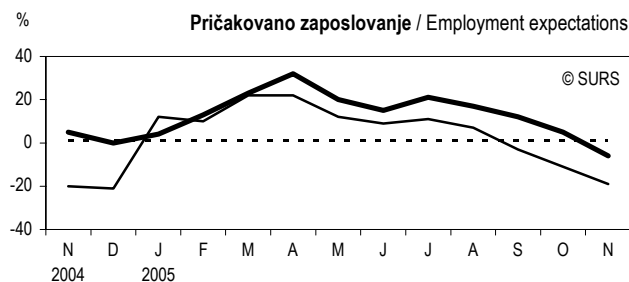
Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



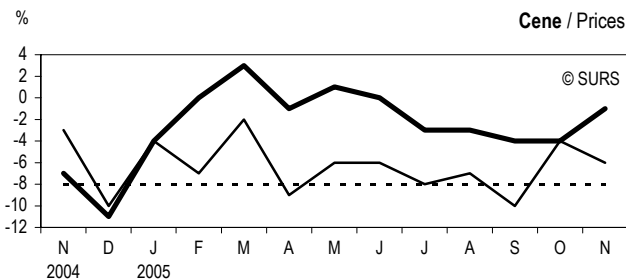
Zaposlovanje / Employment



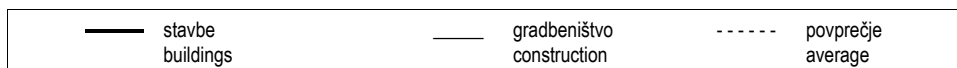
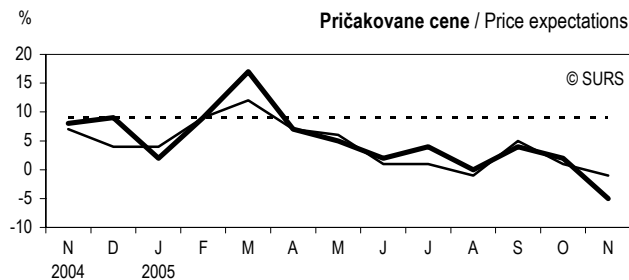
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



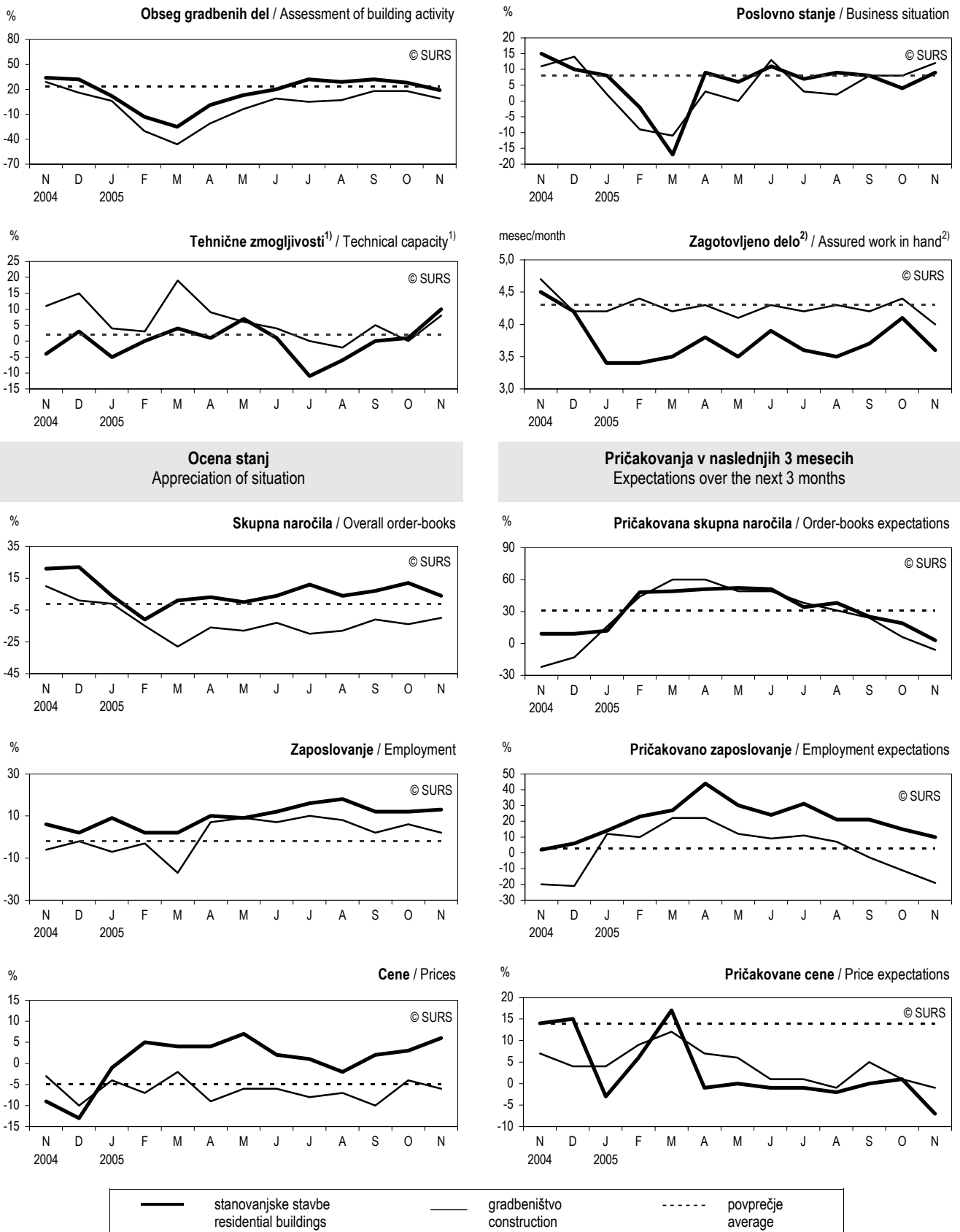
Pričakovane cene / Price expectations



1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodnami 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, november 2004 - november 2005

Evolution of economic indicators for residential buildings, Slovenia, November 2004 - November 2005

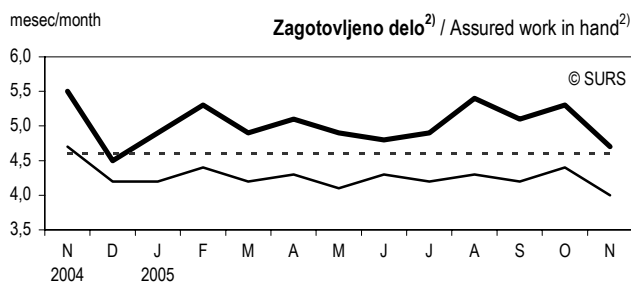
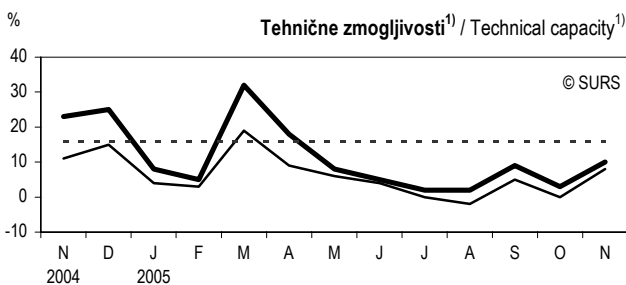
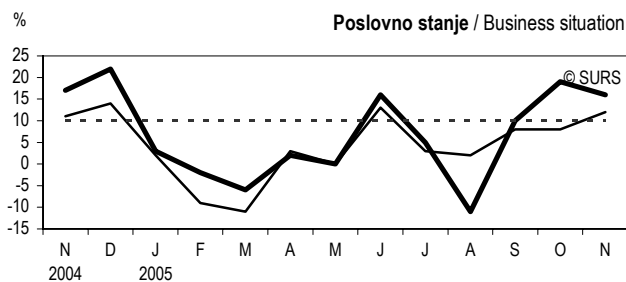
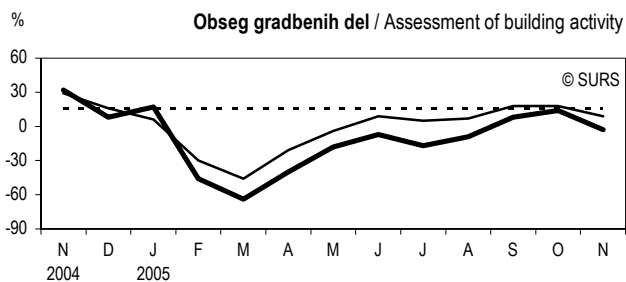


1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
 2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in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

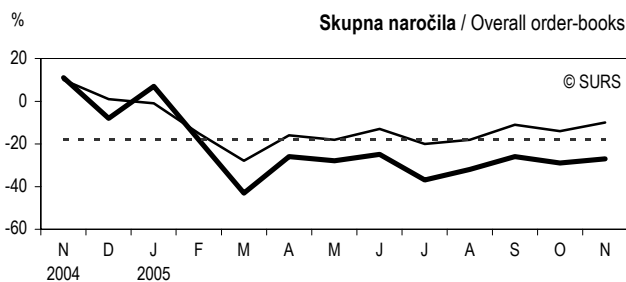


3.3 Gibanje ekonomskih kazalnikov za gradbene inženirske objekte, Slovenija, november 2004 - november 2005

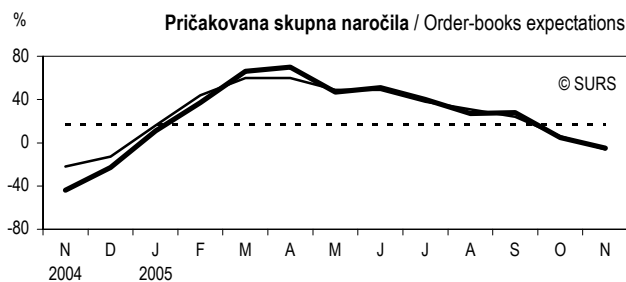
Evolution of economic indicators for civil engineering, Slovenia, November 2004 - November 2005



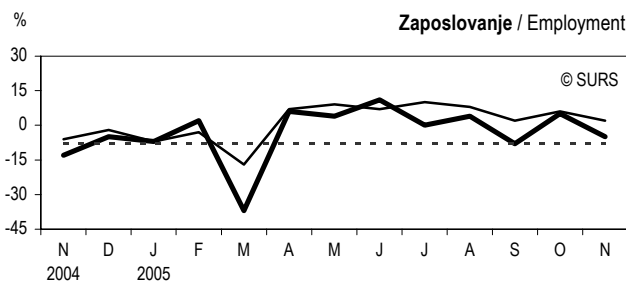
Ocena stanj
Appreciation of situation



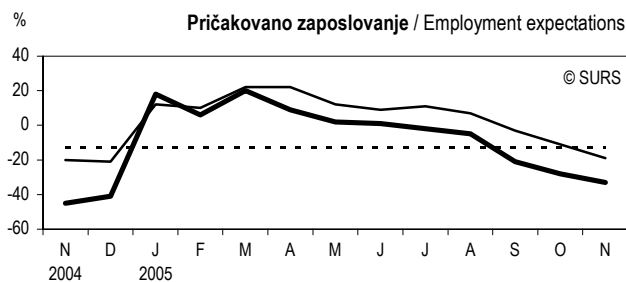
Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



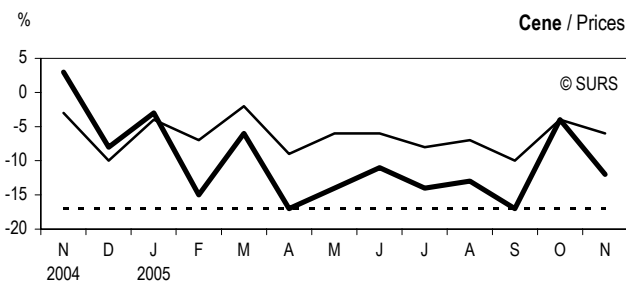
Zaposlovanje / Employment



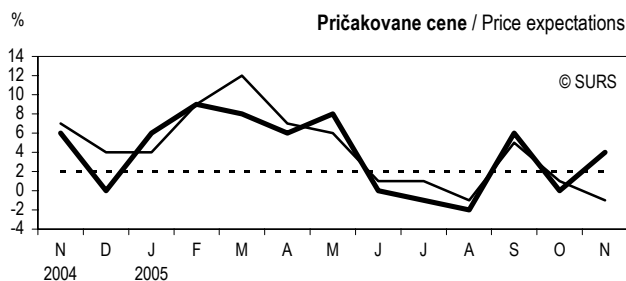
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

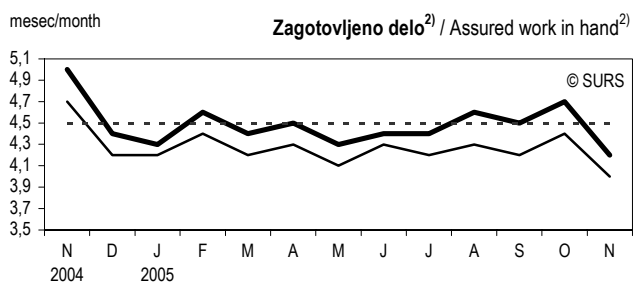
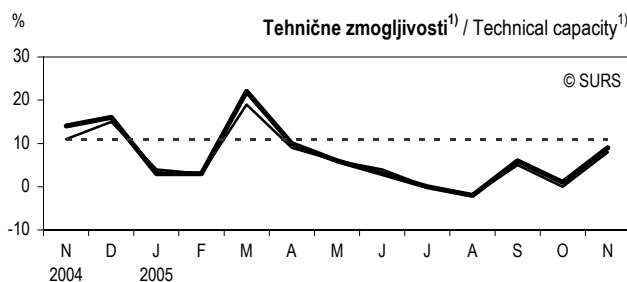
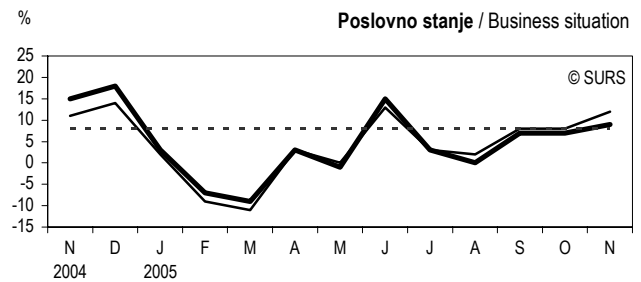
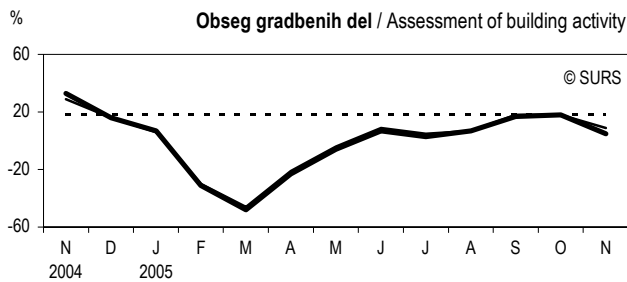


— gradbeni inženirski objekti / civil engineering — gradbeništvo / construction - - - - - povprečje / average

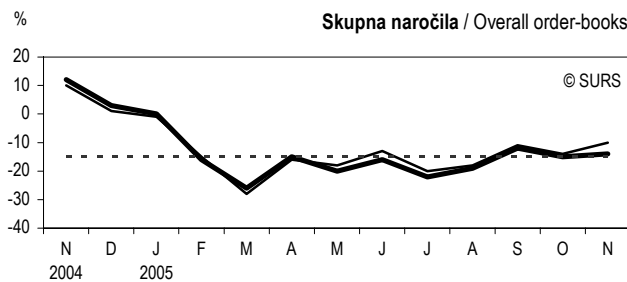
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in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

4. GIBANJE EKONOMSKIH KAZALNIKOV V PODJETJIH PO DEJAVNOSTIH, SLOVENIJA, NOVEMBER 2004 - NOVEMBER 2005 EVOLUTION OF ECONOMIC INDICATORS IN ENTERPRISES BY ACTIVITY, SLOVENIA, NOVEMBER 2004 - NOVEMBER 2005

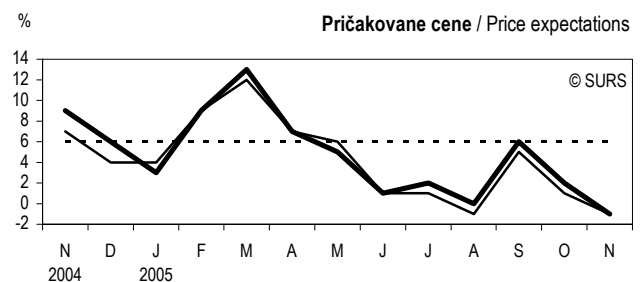
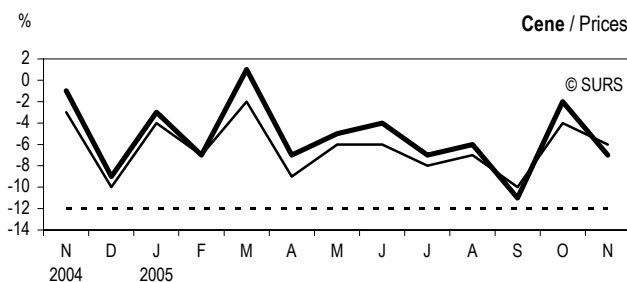
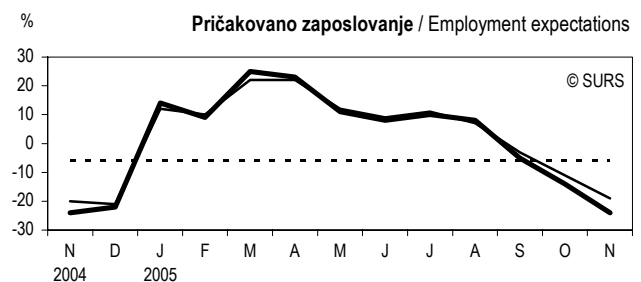
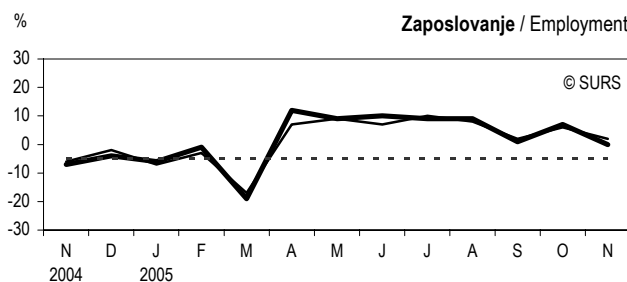
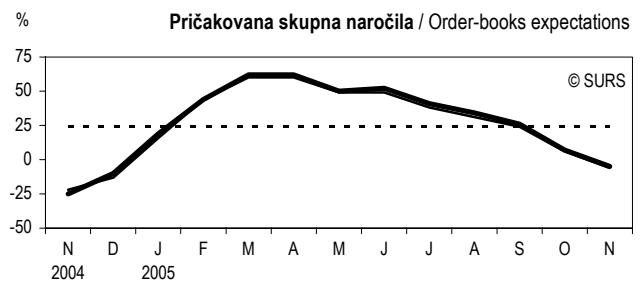
4.1 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo gradnja objektov in delov objektov, Slovenija, november 2004 - november 2005 Evolution of economic indicators in enterprises engaged in construction works, Slovenia, November 2004 - November 2005



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

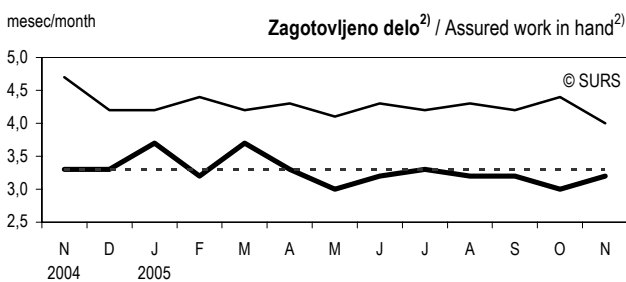
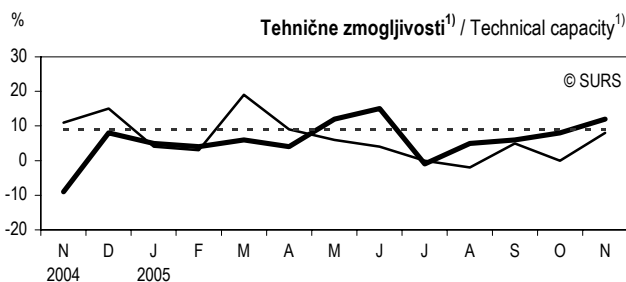
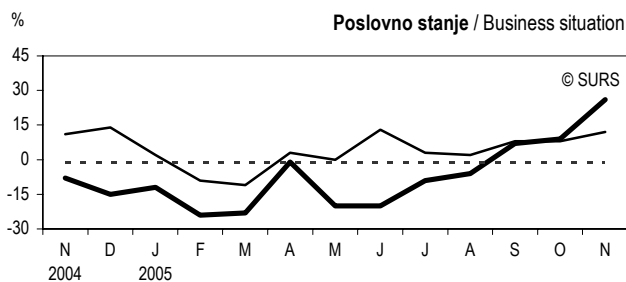
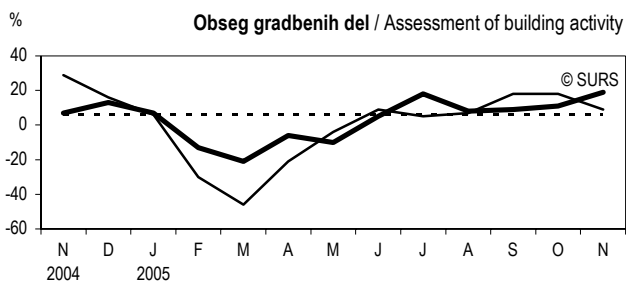
- - - - - povprečje
average

- 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 pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

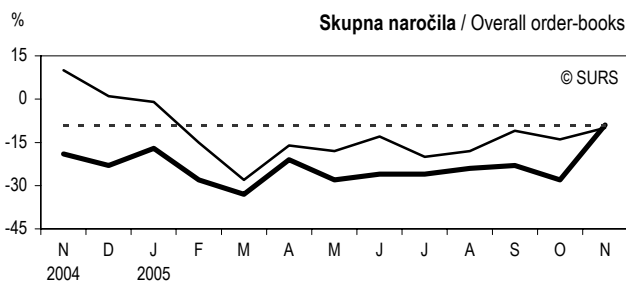


4.2 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo inštalacije pri gradnjah, Slovenija, november 2004 - november 2005

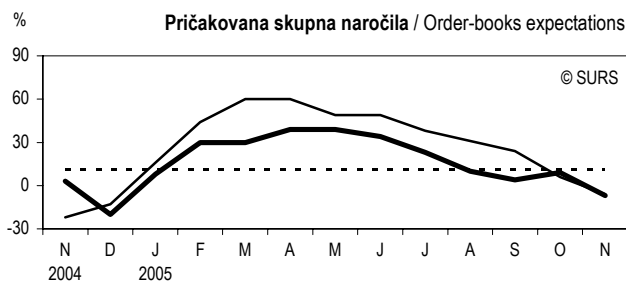
Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, Slovenia, November 2004 - November 2005



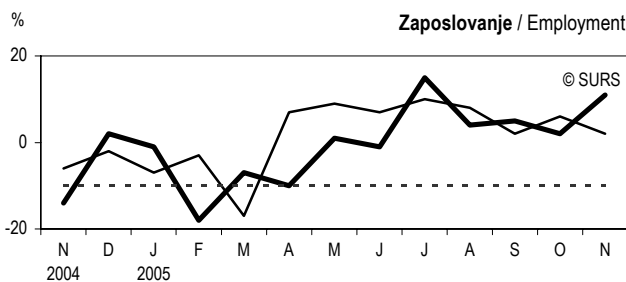
Ocena stanja / Appreciation of situation



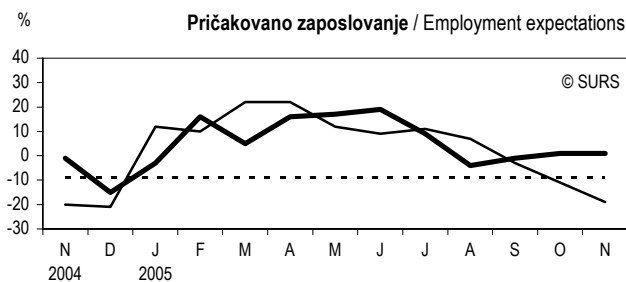
Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



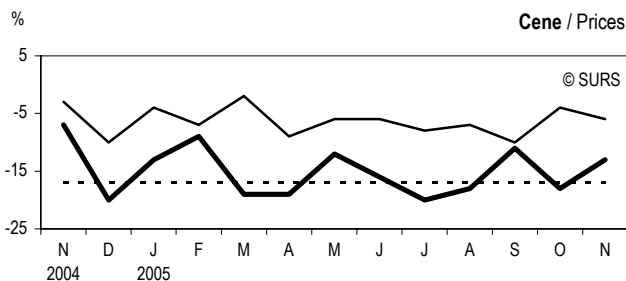
Zaposlovanje / Employment



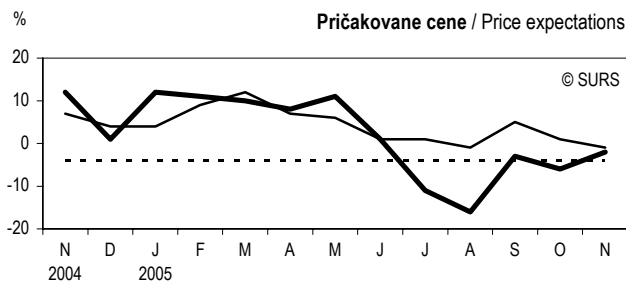
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

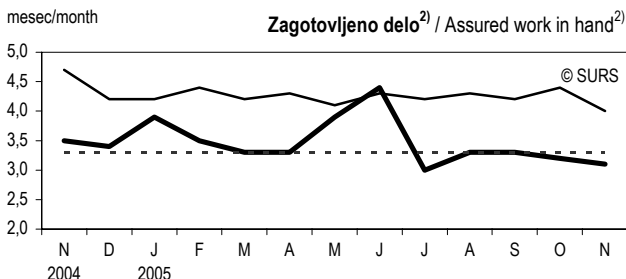
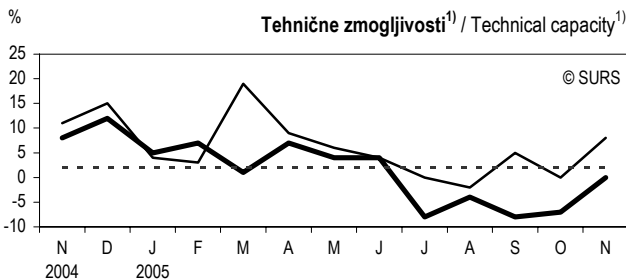
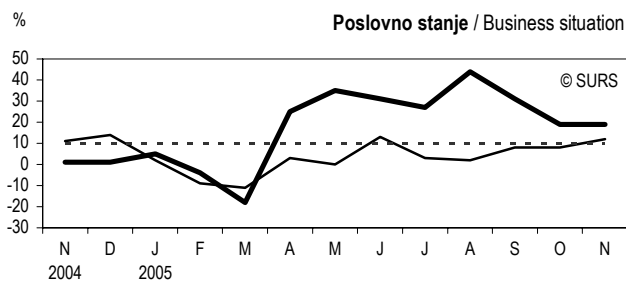
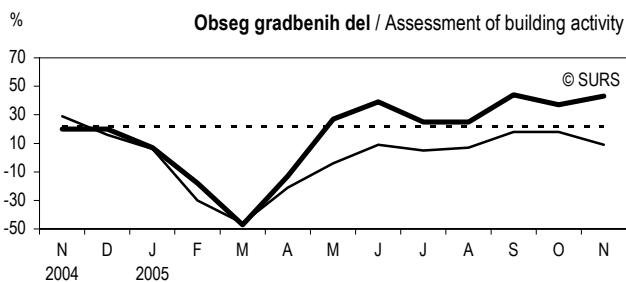


— inštalacije pri gradnjah / installation of equipment and fixtures
 — gradbeništvo / construction
 - - - - - povprečje / average

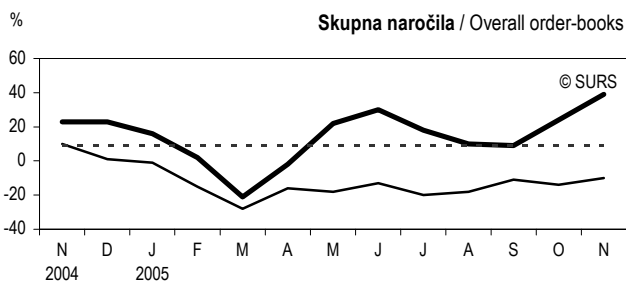
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.
 2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in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

4.3 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo zaključna gradbena dela, Slovenija, november 2004 - november 2005

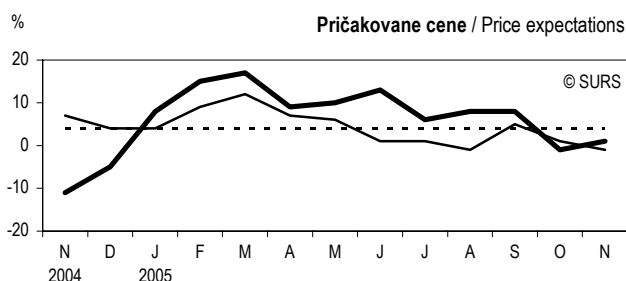
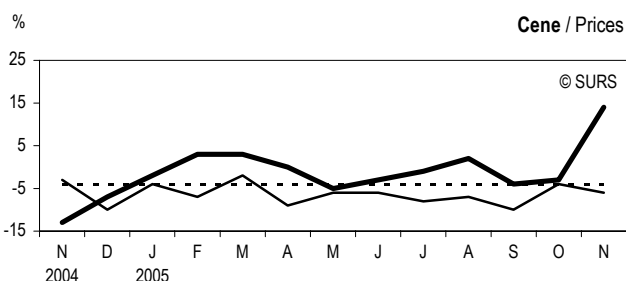
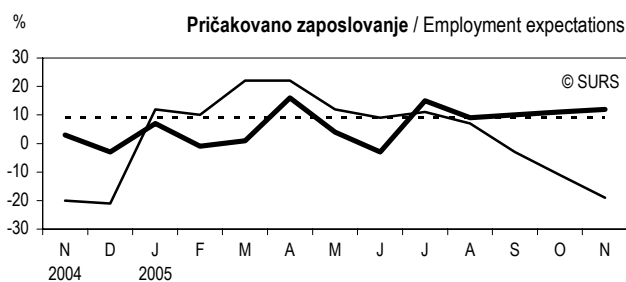
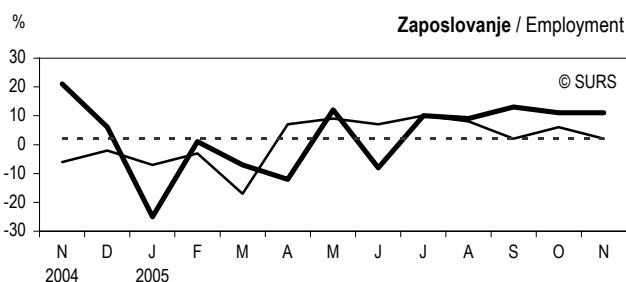
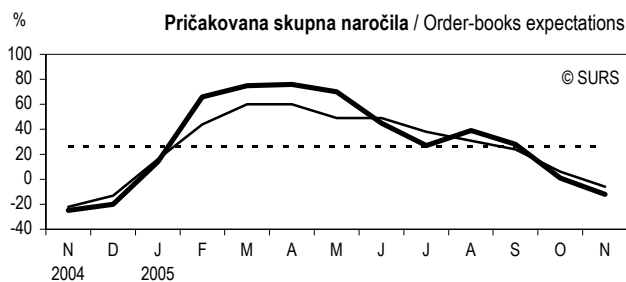
Evolution of economic indicators in enterprises engaged in finishing works, Slovenia, November 2004 - November 2005



Ocena stanj
Appreciation of situation



Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



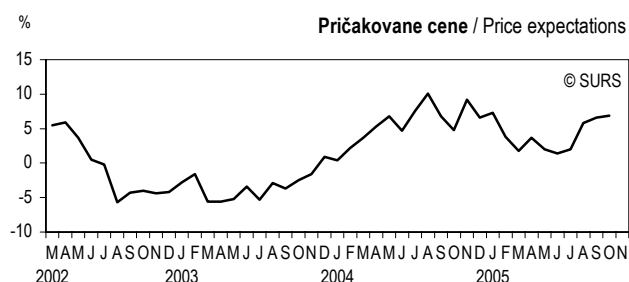
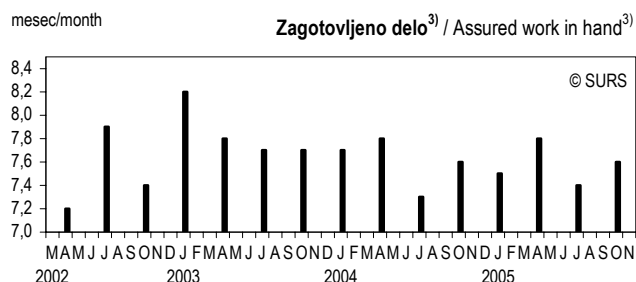
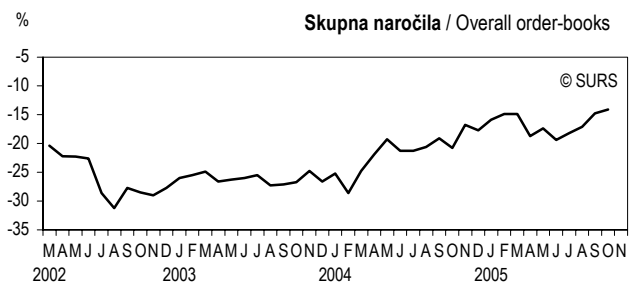
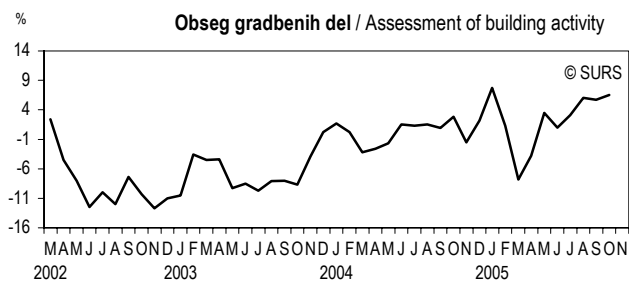
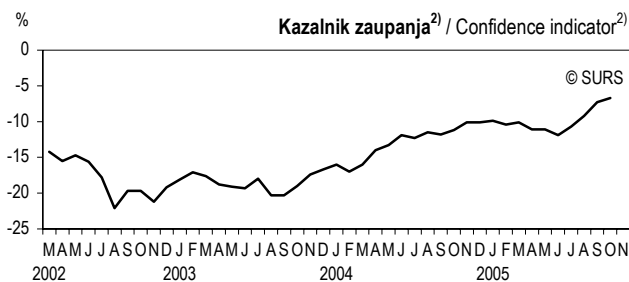
— zaključna gradbena dela finishing works — gradbeništvo construction - - - - - povprečje average

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 pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

5. GIBANJE EKONOMSKIH KAZALNIKOV V GRADBENIŠTVU V EU, MAREC 2002 - NOVEMBER 2005¹⁾

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN THE EU, MARCH 2002 - NOVEMBER 2005¹⁾



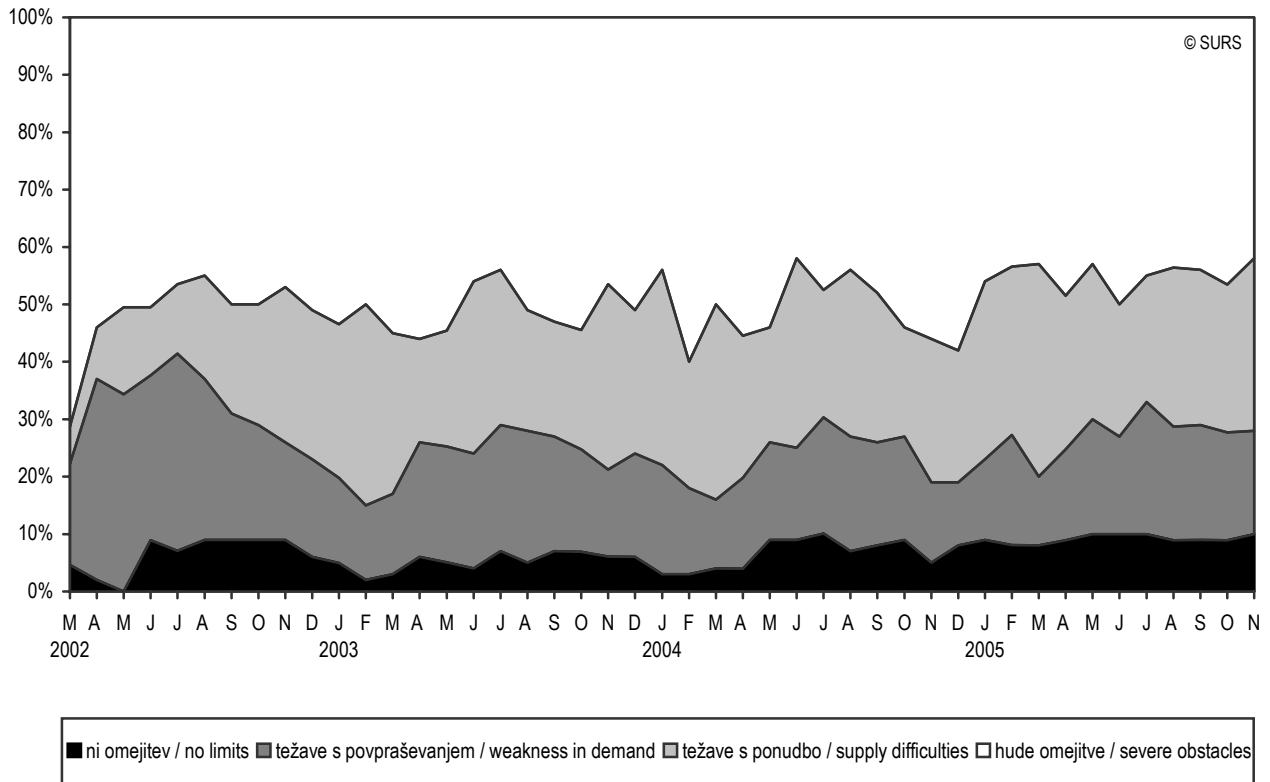
1) Vir / Source: http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm. Podatki o EU za zadnji mesec niso na voljo. Podatki so desezonirani. / Data for the EU for the last month are not available. Data are seasonally adjusted.

2) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašani 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 pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

6. OMEJITVENI DEJAVNIKI V GRADBENIŠTVU V SLOVENIJI, MAREC 2002 - NOVEMBER 2005

FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002 - NOVEMBER 2005



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

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

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

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

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

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

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

ENOTE OPAZOVANJA

Opazujemo podjetja, ki so razvrščena v gradbeništvu, to je v oddelek 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 433 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 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.

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.

COVERAGE

433 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.



Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanji 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 gradbeništvu 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?
- Pri običajnih delovnih urah 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 <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

Novembra 2005 so direktorji tendence v gradbeništvu ocenili slabše kot pretekli mesec. Kazalnik zaupanja je bil za 2 odstotni točki nižji kot pretekli mesec in je s tem dosegel najnižjo vrednost v zadnjih dveh letih in pol. V primerjavi z istim mesecem lani je bil nižji za 10 odstotnih točk ter za 14 odstotnih točk nižji od lanskega povprečja.

POSLOVNO STANJE

Ocena poslovnega stanja je bila v primerjavi s preteklim mesecem višja za 4 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 1 odstotno točko in za 5 odstotnih točk višja od lanskega povprečja.

OBSEG GRADBENIH DEL

Ocena obsega gradbenih del je v primerjavi s preteklim mesecem padla za 9 odstotnih točk. Glede na isti mesec lani je bila nižja za 20 odstotnih točk in za 7 odstotnih točk pod povprečjem lanskega leta.

SKUPNA NAROČILA IN PRIČAKOVANA SKUPNA NAROČILA

Vrednost kazalnika skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 4 odstotne točke. Glede na isti mesec lani je bila nižja za 20 odstotnih točk in za 7 odstotnih točk nižja od lanskega povprečja.

Vrednost kazalnika pričakovanih skupnih naročil za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 12 odstotnih točk. Glede na isti mesec lani je bila višja za 16 odstotnih točk in 33 odstotnih točk pod povprečjem lanskega leta.

ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Ocena zaposlovanja se je v primerjavi s preteklim mesecem znižala za 4 odstotne točke. V primerjavi z istim mesecem lani je bila višja za 8 odstotnih točk in za 1 odstotno točko nad povprečjem lanskega leta.

Ocena pričakovanega zaposlovanja se je v primerjavi s preteklim mesecem znižala za 8 odstotnih točk. Glede na isti mesec lani je bila višja za 1 odstotno točko in 21 odstotnih točk pod povprečjem lanskega leta.

CENE IN CENOVNA PRIČAKOVANJA

Vrednost kazalnika cen se je v primerjavi s preteklim mesecem znižala za 2 odstotni točki. Glede na isti mesec lani je bila nižja za 3 odstotne točke in 2 odstotni točki pod povprečjem lanskega leta.

Cenovna pričakovanja za naslednje 3 mesece so bila v primerjavi s preteklim mesecem nižja za 2 odstotni točki. Glede na isti mesec lani so bila nižja za 8 odstotnih točk in 13 odstotnih točk pod lanskim povprečjem.

TEHNIČNE ZMOGLJIVOSTI

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

Kazalnik se je v primerjavi s preteklim mesecem zvišal za 8 odstotnih točk. Glede na isti mesec lani je bil nižji za 3 odstotne točke in za 2 odstotni točki pod lanskim povprečjem.

ZAGOTOVLJENO DELO

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

V novembru so imela podjetja s pogodbami zagotovljeno delo v

COMMENT

In November 2005, managers estimated business tendencies in construction worse than in the previous month. The confidence indicator fell by 2 percentage points compared to the previous month, by 10 percentage points compared to November 2004 and by 14 percentage points compared to last year's average.

BUSINESS SITUATION

The evaluation of the business situation rose by 4 percentage points compared to the previous month. Compared to November 2004 it was up by 1 percentage point and compared to last year's average by 5 percentage points.

BUILDING ACTIVITY

The evaluation of the building activity deteriorated by 9 percentage points compared to the previous month. Compared to November 2004 it was down by 20 percentage points and compared to last year's average by 7 percentage points.

OVERALL ORDER-BOOKS AND EXPECTED ORDER-BOOKS

The value of the overall order-books indicator rose by 4 percentage points compared to the previous month. Compared to November 2004 it was down by 20 percentage points and compared to last year's average by 7 percentage points.

The value of the expected order-books for the next three months fell by 12 percentage points compared to the previous month. Compared to November 2004 it was up by 16 percentage points and compared to last year's average it was down by 33 percentage points.

EMPLOYMENT AND EMPLOYMENT EXPECTATIONS

The evaluation of the employment indicator fell by 4 percentage points compared to the previous month. Compared to November 2004 it was up by 8 percentage points and compared to last year's average by 1 percentage point.

The evaluation of expected employment fell by 8 percentage points compared to the previous month. Compared to November 2004 it was up by 1 percentage point and compared to last year's average it was down by 21 percentage points.

PRICES AND PRICE EXPECTATIONS

The value of the prices indicator fell by 2 percentage points compared to the previous month, by 3 percentage points compared to November 2004 and by 2 percentage points compared to last year's average.

Price expectations for the next three months fell by 2 percentage points compared to the previous month. Compared to November 2004 they were down by 8 percentage points and compared to last year's average by 13 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.

Compared to the previous month the indicator rose by 8 percentage points. Compared to November 2004 it was down by 3 percentage points and compared to last year's average by 2 percentage points.

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 November 2005, enterprises had work assured for 4.0 months on



povprečju za 4,0 meseca, to je za 0,4 meseca manj kot v preteklem mesecu, pa za 0,7 meseca manj kot v lanskem novembru in za 0,5 meseca manj 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 42 % zaposlenih (oziroma 36 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu se je z njimi srečevalo 30 % zaposlenih (oziroma 44 % podjetij).

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 18 % zaposlenih (oziroma 12 % podjetij).

10 % zaposlenih (oziroma 9 % podjetij) v tem mesecu ni imelo omejitev.

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

- 43 % podjetij (ali 51 % zaposlenih) je omejevala velika konkurenca v dejavnosti;
- 39 % podjetij (ali 41 % zaposlenih) so omejevali visoki stroški dela;
- 37 % podjetij (ali 30 % zaposlenih) je omejevalo pomanjkanje usposobljenih delavcev;
- 29 % podjetij (ali 32 % zaposlenih) so omejevali visoki stroški materiala;
- 19 % podjetij (ali 16 % zaposlenih) so omejevali visoki finančni stroški;
- 18 % podjetij (ali 13 % zaposlenih) so omejevale slabe vremenske razmere;
- 12 % podjetij (ali 10 % zaposlenih) so omejevali drugi dejavniki;
- 11 % podjetij (ali 16 % zaposlenih) je omejevalo nezadostno povpraševanje;
- 8 % podjetij (ali 5 % zaposlenih) so omejevale težave pri pridobivanju kreditov;
- 3 % podjetij (ali 1 % zaposlenih) je omejevalo pomanjkanje opreme;
- 1 % podjetij (ali 2 % zaposlenih) je omejevalo pomanjkanje materialov.

Največja omejitev v gradbeništvu je velika konkurenca v dejavnosti, sledita pomanjkanje usposobljenih delavcev in visoki stroški dela.

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

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%.

Sestavila / Prepared by: Brigita Vrabič Kek

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 Joža Lakovič - Angleško besedilo jezikovno uredil Boris Panič - Naklada 445 izvodov - ISSN zbirke Statistične informacije 1408-192X - ISSN podzbirke Gradbeništvu 1408-9300 - Informacije daje Informacijsko središče, tel. (01) 241 51 04 - El. pošta: info.stat@gov.si - http://www.stat.si.

average. Compared to the previous month the indicator fell by 0.4 month, compared to November 2004 it was down by 0.7 months and compared to last year's average by 0.5 month.

LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In November 2005, 42% of employees (36% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In November 2005, 30% of employees (44% of enterprises) faced them.

The third most important obstacles were demand difficulties. In November 2005, 18% of employees (12% of enterprises) faced them.

10% of employees (9% of enterprises) experienced no obstacles in November 2005.

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

- 43% of enterprises (or 51% of employees) were limited by competition in own sector;
- 39% of enterprises (or 41% of employees) were limited by high costs of labour;
- 37% of enterprises (or 30% of employees) were limited by shortage of skilled labour;
- 29% of enterprises (or 32% of employees) were limited by high costs of material;
- 19% of enterprises (or 16% of employees) were limited by high costs of capital;
- 18% of enterprises (or 13% of employees) were limited by bad weather conditions;
- 12% of enterprises (or 10% of employees) were limited by other factors;
- 11% of enterprises (or 16% of employees) were limited by insufficient demand;
- 8% of enterprises (or 5% of employees) were limited by access to bank credits;
- 3% of enterprises (or 1% of employees) were limited by lack of equipment;
- 1% of enterprises (or 2% of employees) were limited by shortage of material.

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

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