



**19 GRADBENIŠTVO**  
**CONSTRUCTION**

Št./No 9

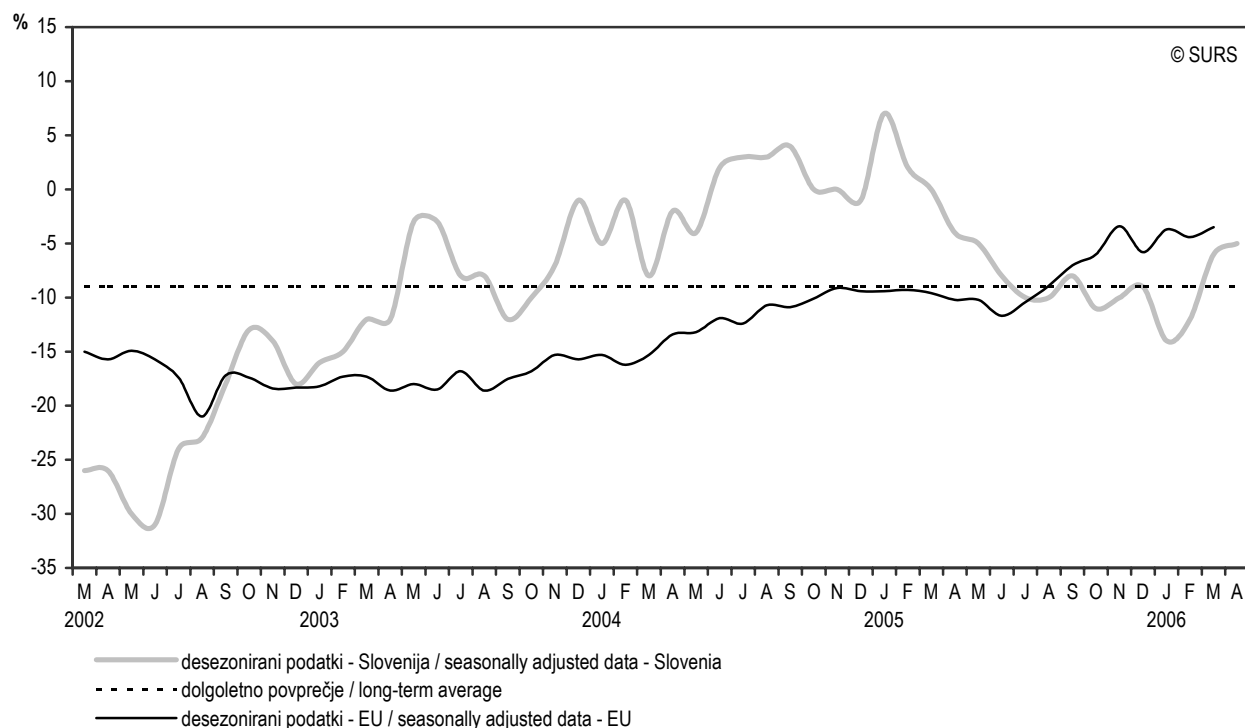
**POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, APRIL 2006**

**BUSINESS TENDENCY IN CONSTRUCTION, SLOVENIA, APRIL 2006**

- Direktorji so poslovne tendence v gradbeništvu ocenili aprila 2006 boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 1 odstotno točko višja kot pretekli mesec. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in za 1 odstotno točko višja od povprečja lanskega leta.
  - Na rast kazalnika zaupanja je vplivalo zvišanje pričakovanega zaposlovanja.
  - Kazalniki stanj so se v primerjavi s preteklim mesecem večinoma izboljšali. Pričakovanja za naslednje tri mesece so ugodna.
- In April 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 1 percentage point compared to the previous month. Compared to April 2005 it was down by 1 percentage point and 1 percentage point above last year's average.
  - The rise of the confidence indicator was influenced by the rise of expected employment.
  - Compared to the previous month, the observed indicators for the appreciation of the situation mostly improved. The expectations for the next three months are favourable.

**1. KAZALNIK ZAUPANJA V GRADBENIŠTVU<sup>1)</sup> V SLOVENIJI IN EU<sup>2)</sup>, MAREC 2002–APRIL 2006**

**CONSTRUCTION CONFIDENCE INDICATOR<sup>1)</sup> IN SLOVENIA AND EU<sup>2)</sup>, MARCH 2002–APRIL 2006**



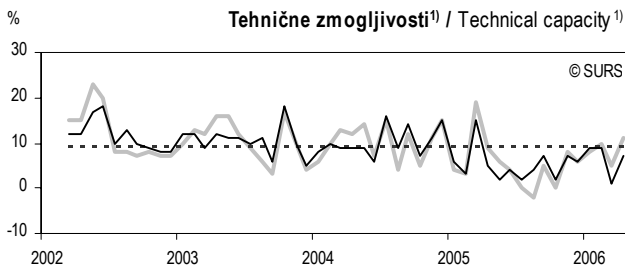
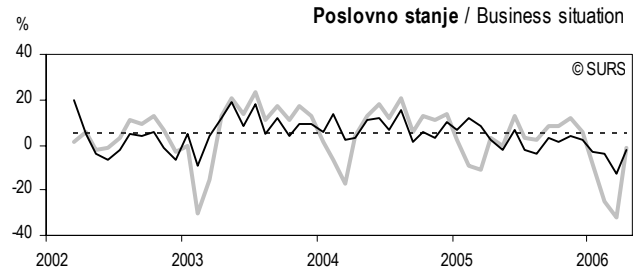
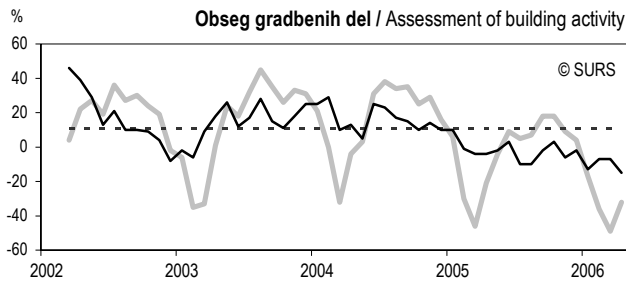
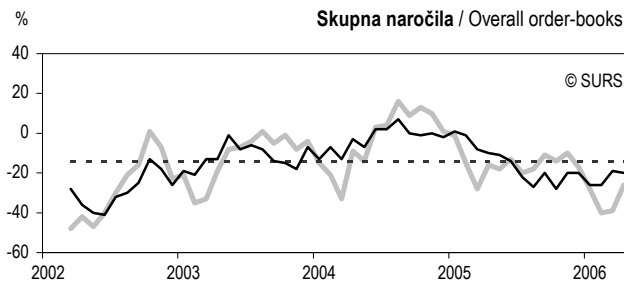
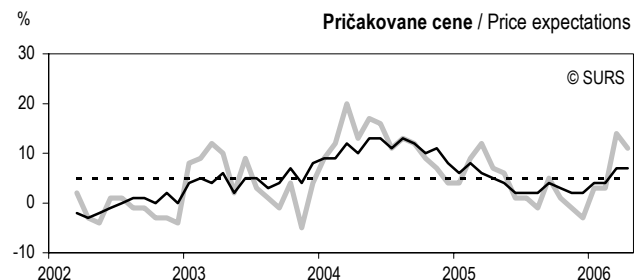
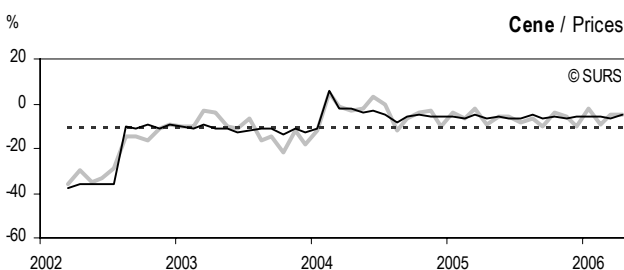
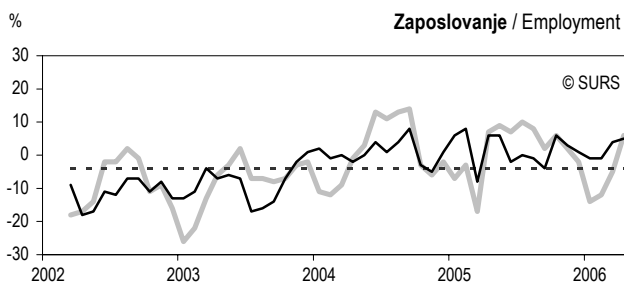
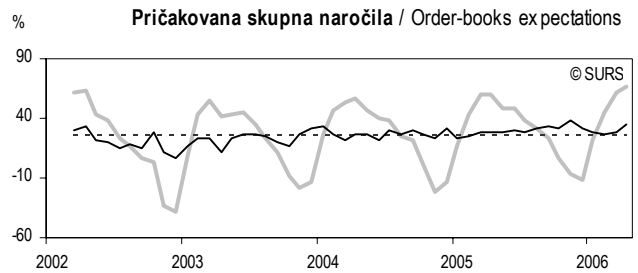
1) Kazalnik zaupanja je povprečje odgovorov (ravnotežij) na vprašanji o sedanjih skupnih naročilih in pričakovanem zaposlovanju. Podatki so desezonirani.

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](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–APRIL 2006**

EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA, MARCH 2002–APRIL 2006

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

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

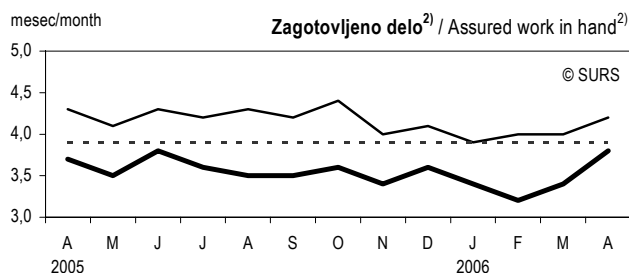
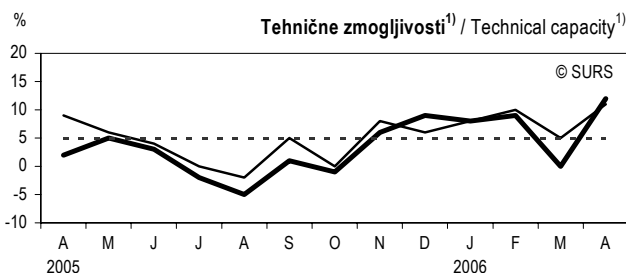
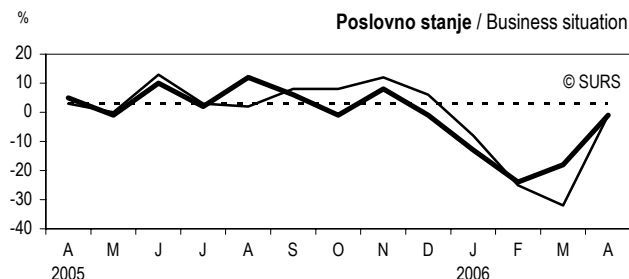
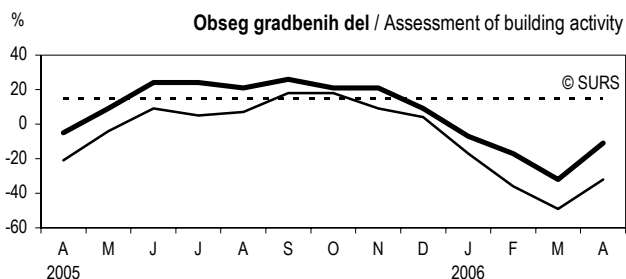
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

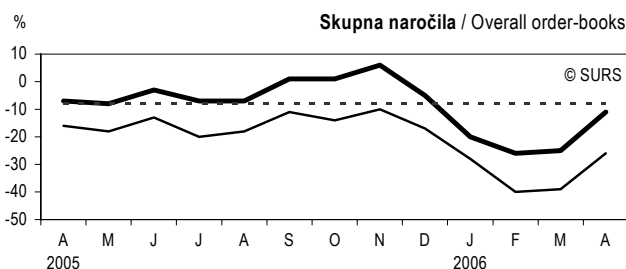


### 3. GIBANJE EKONOMSKIH KAZALNIKOV GLEDE NA VRSTO GRADBENIH OBJEKTOV, SLOVENIJA, APRIL 2005– APRIL 2006 EVOLUTION OF ECONOMIC INDICATORS BY THE TYPE OF CONSTRUCTION, SLOVENIA, APRIL 2005– APRIL 2006

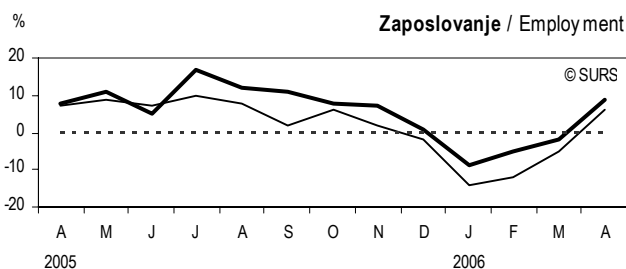
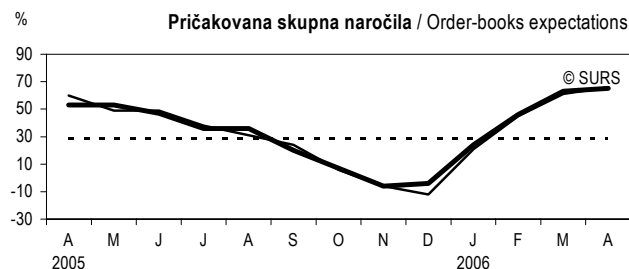
#### 3.1 Gibanje ekonomskih kazalnikov za stavbe, Slovenija, april 2005–april 2006 Evolution of economic indicators for buildings, Slovenia, April 2005–April 2006



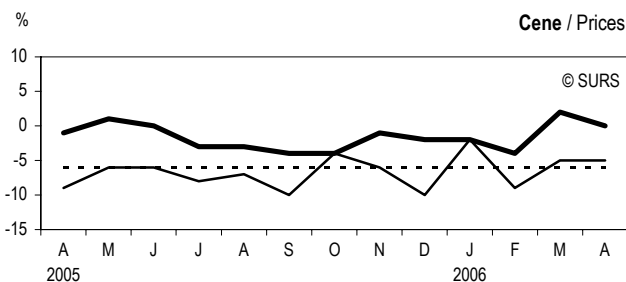
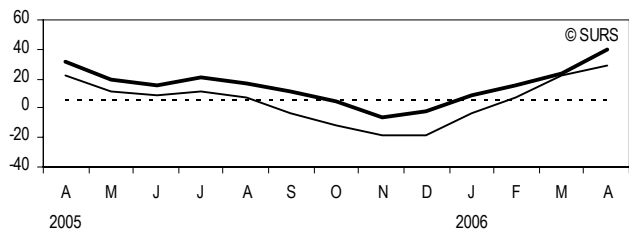
**Ocena stanj  
Appreciation of situation**



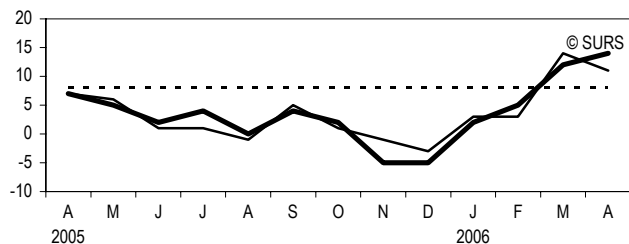
**Pričakovanja v naslednjih 3 mesecih  
Expectations over the next 3 months**



**Pričakovano zaposlovanje / Employment expectations**



**Pričakovane cene / Price expectations**

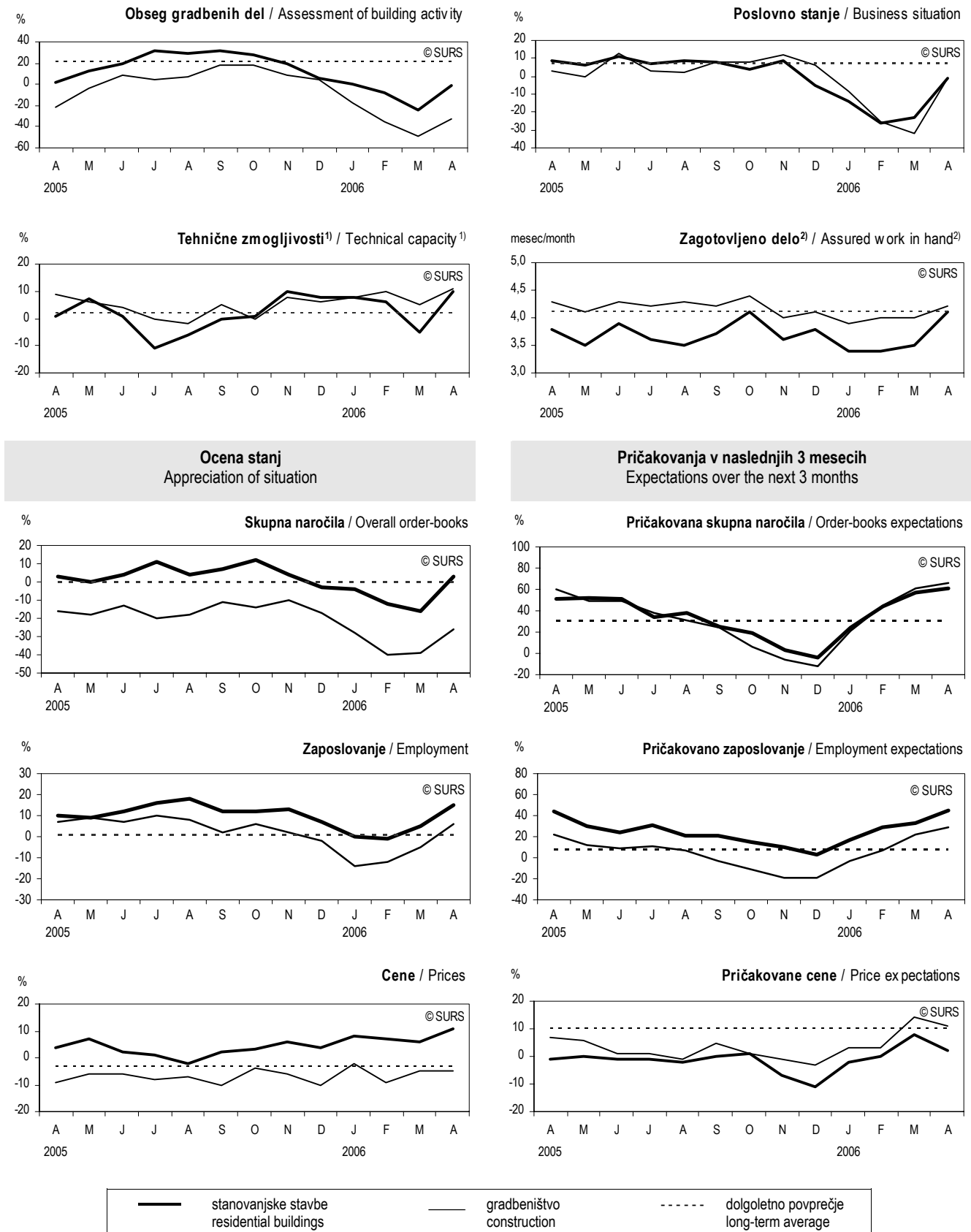


— stavbe buildings      — gradbeništvo construction      - - - - - dolgoletno povprečje long-term average

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, april 2005–april 2006

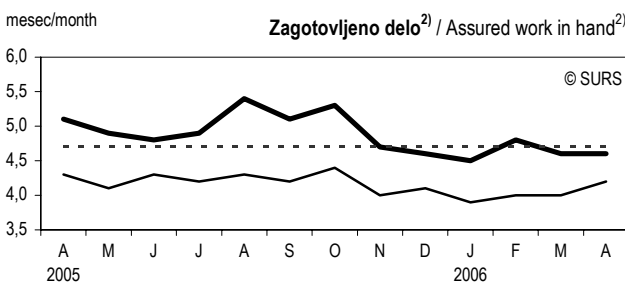
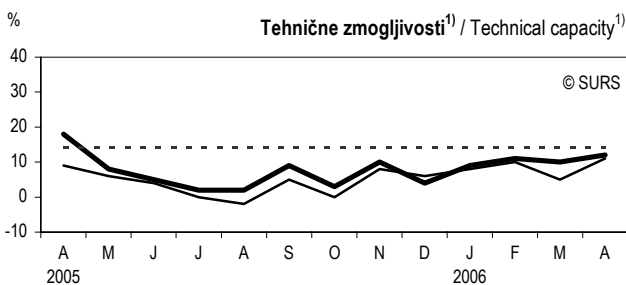
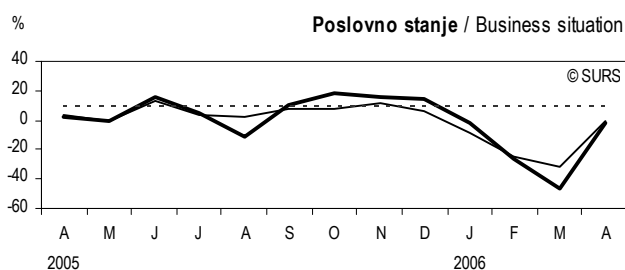
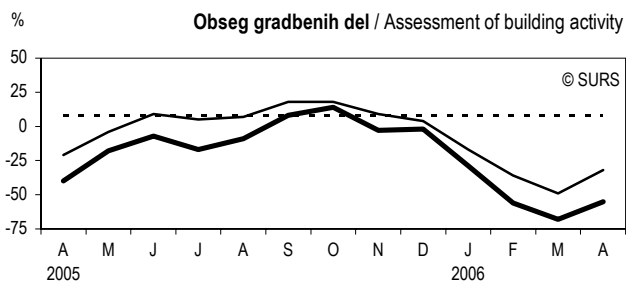
Evolution of economic indicators for residential buildings, Slovenia, April 2005–April 2006



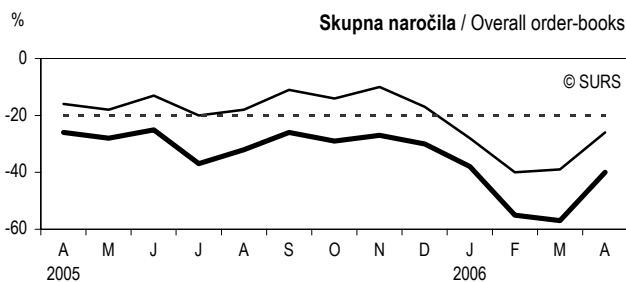
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.  
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in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

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

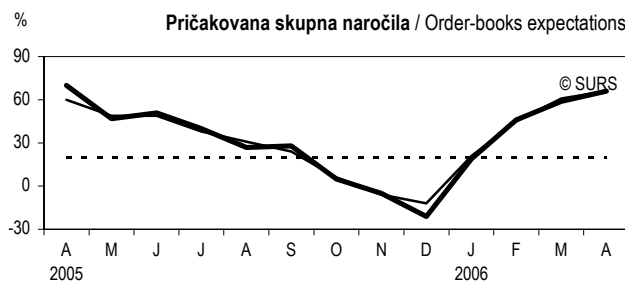
Evolution of economic indicators for civil engineering, Slovenia, April 2005–April 2006



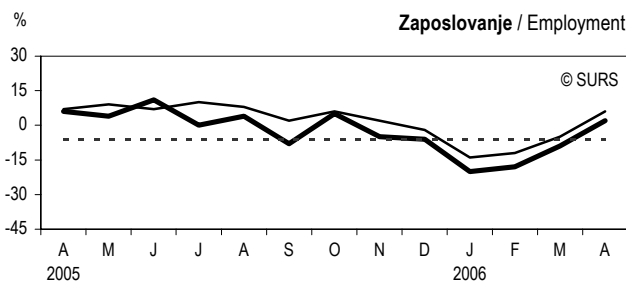
**Ocena stanj**  
Appreciation of situation



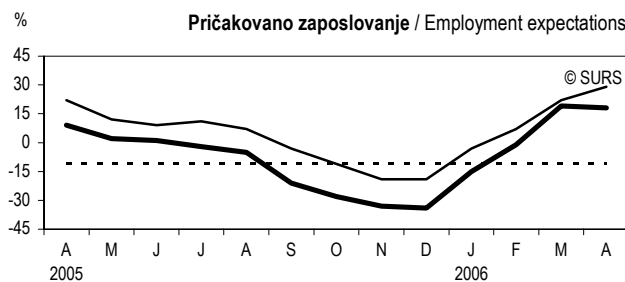
**Pričakovanja v naslednjih 3 mesecih**  
Expectations over the next 3 months



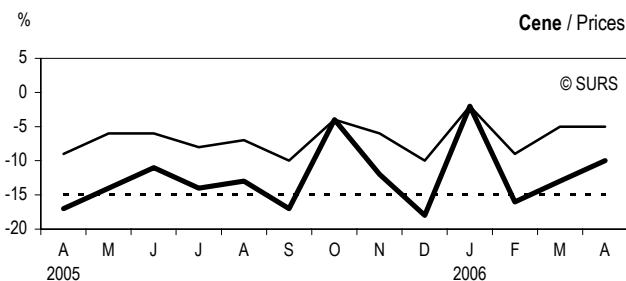
**Zaposlovanje / Employment**



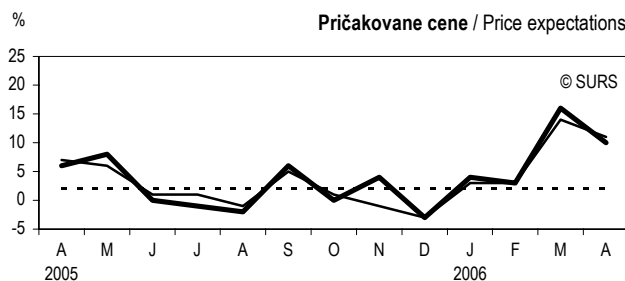
**Pričakovano zaposlovanje / Employment expectations**



**Cene / Prices**



**Pričakovane cene / Price expectations**



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

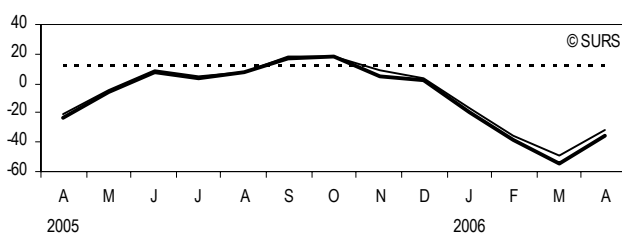
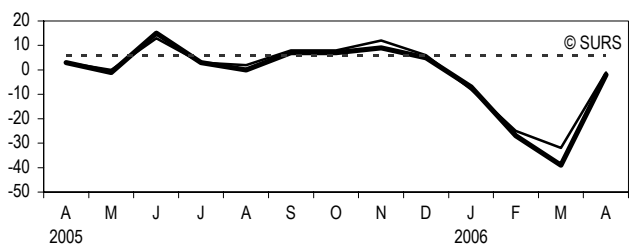
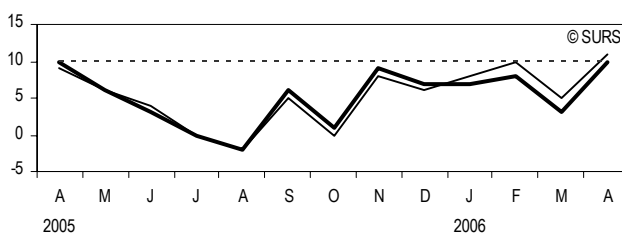
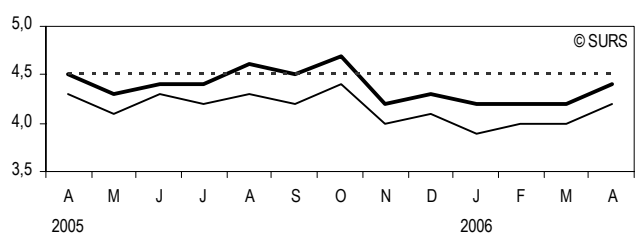
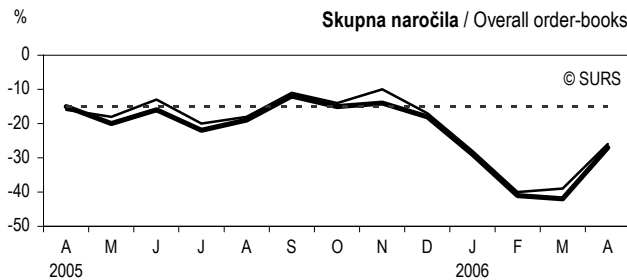
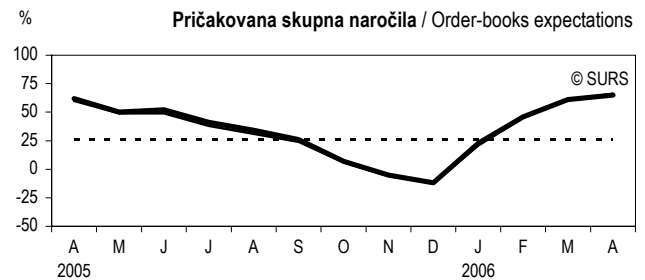
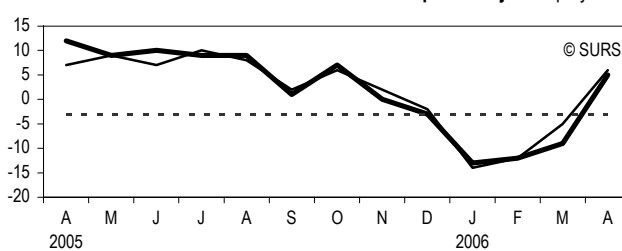
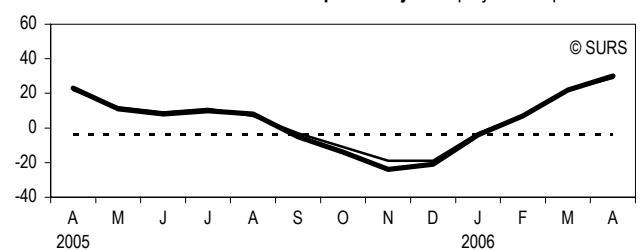
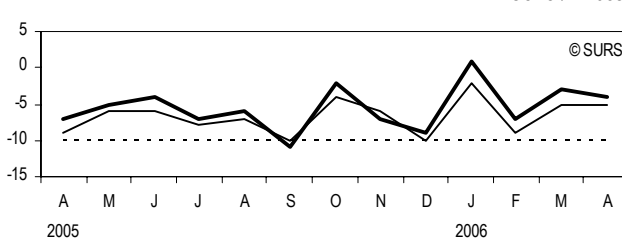
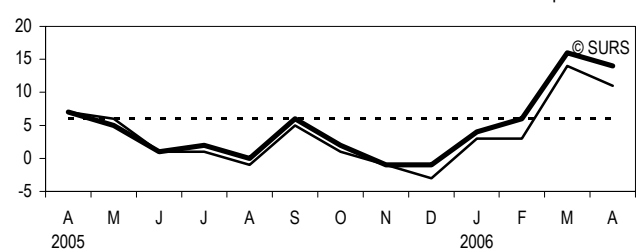
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.  
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in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

**4. GIBANJE EKONOMSKIH KAZALNIKOV V PODJETJIH PO DEJAVNOSTIH, SLOVENIJA, APRIL 2005–APRIL 2006**

EVOLUTION OF ECONOMIC INDICATORS IN ENTERPRISES BY ACTIVITY, SLOVENIA, APRIL 2005–APRIL 2006

**4.1 Gibanje ekonomskih kazalnikov v podjetjih z dejavnostjo gradnja objektov in delov objektov, Slovenija, april 2005–april 2006**

Evolution of economic indicators in enterprises engaged in construction works, Slovenia, April 2005–April 2006

**Obseg gradbenih del / Assessment of building activity****Poslovno stanje / Business situation****Tehnične zmogljivosti<sup>1)</sup> / Technical capacity<sup>1)</sup>****Zagotovljeno delo<sup>2)</sup> / Assured work in hand<sup>2)</sup>****Ocena stanja / Appreciation of situation****Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months****Zaposlovanje / Employment****Pričakovano zaposlovanje / Employment expectations****Cene / Prices****Pričakovane cene / Price expectations**

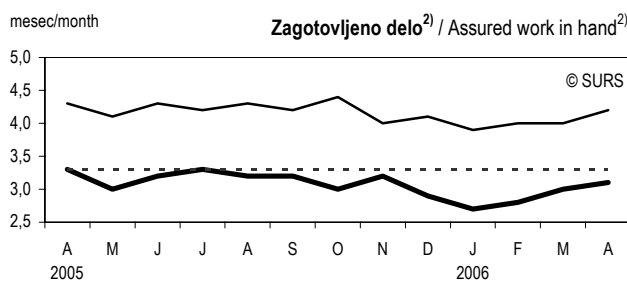
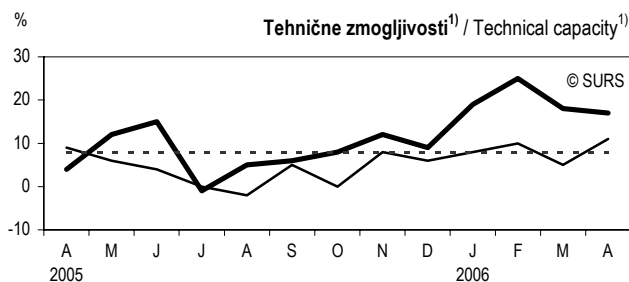
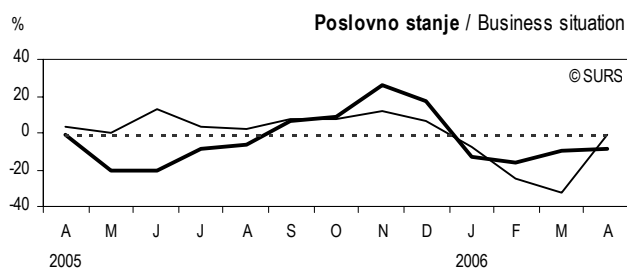
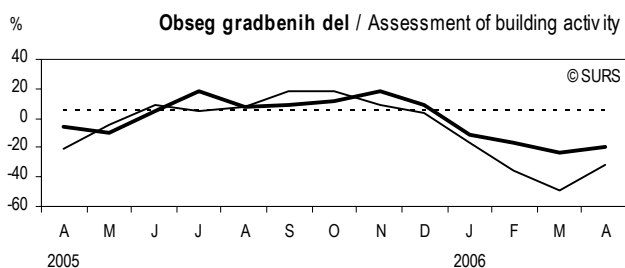
— gradnja objektov in delov objektov / construction works  
 — gradbeništvo / construction  
 - - - - - dolgoletno povprečje / long-term average

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

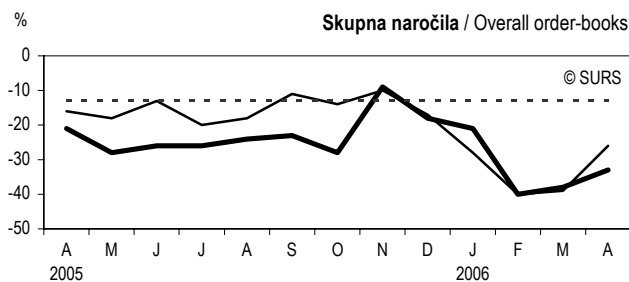
2) Že začeto ali s pogodbami dogovorjeno delo pri običajnih delovnih urah. / With normal working hours, works in progress and contracts in hand.

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

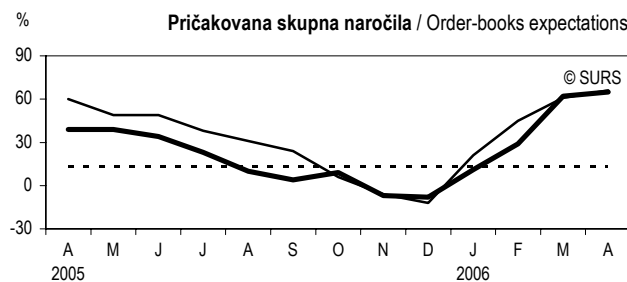
Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, Slovenia, April 2005–April 2006



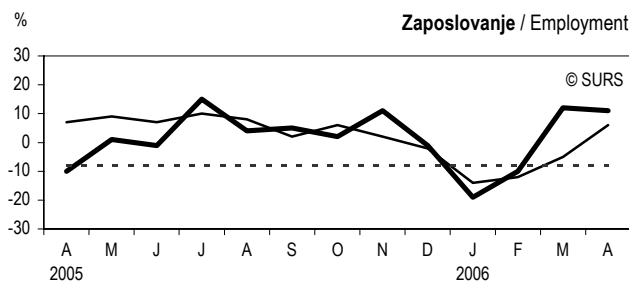
**Ocena stanj**  
Appreciation of situation



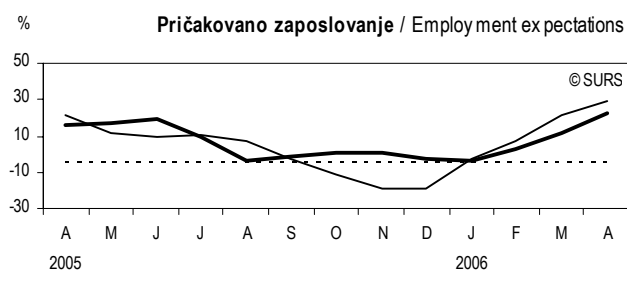
**Pričakovanja v naslednjih 3 mesecih**  
Expectations over the next 3 months



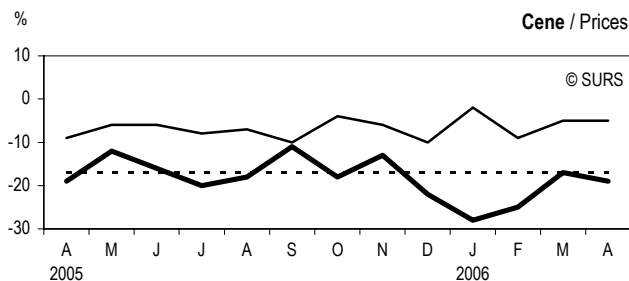
**Zaposlovanje / Employment**



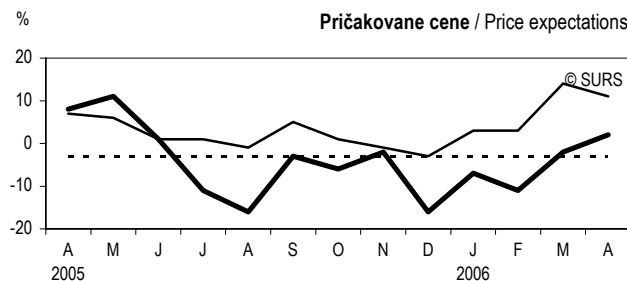
**Pričakovano zaposlovanje / Employment expectations**



**Cene / Prices**



**Pričakovane cene / Price expectations**

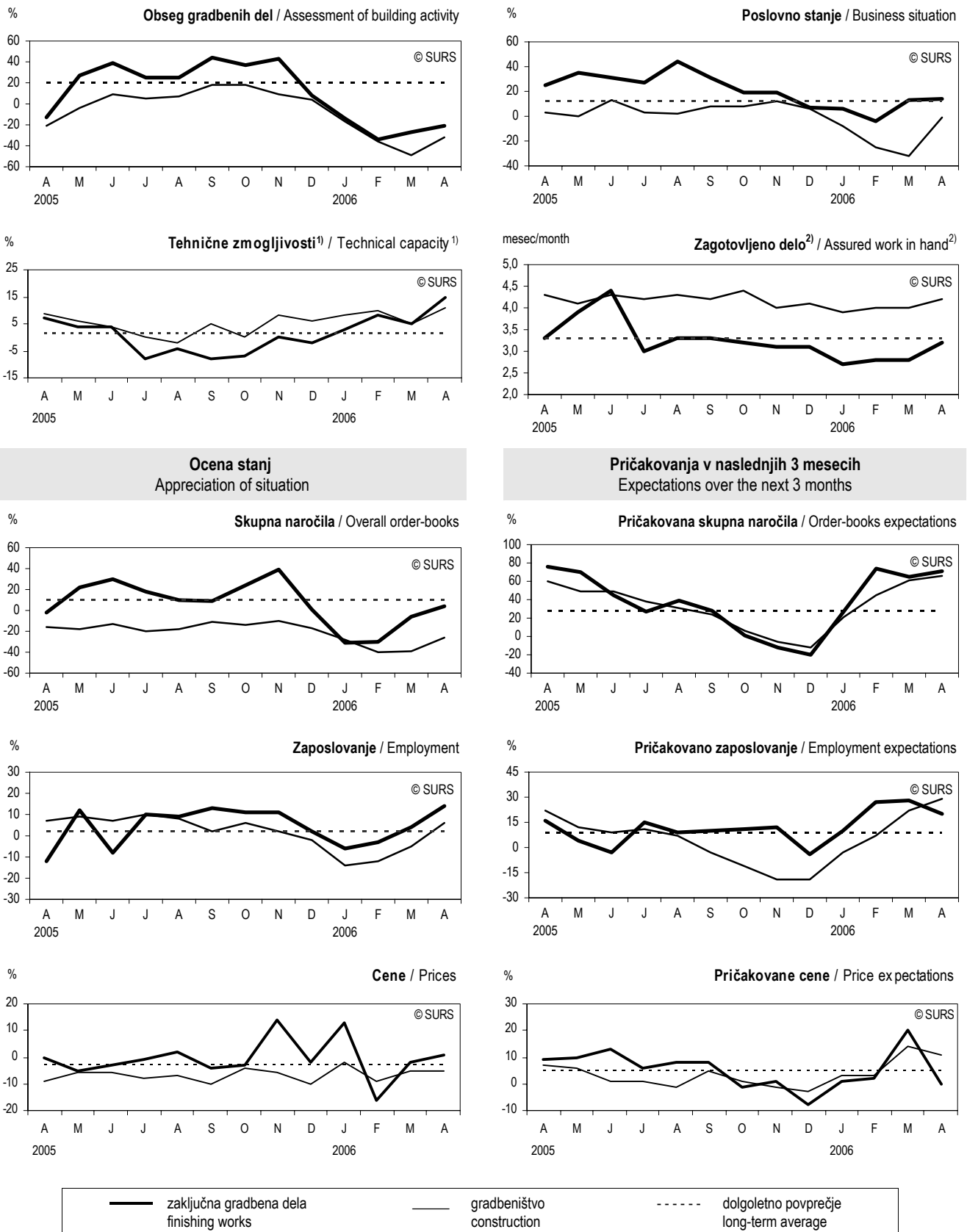


— inštalacije pri gradnjah / installation of equipment and fixtures      — gradbeništvo / construction      - - - - - dolgoletno povprečje / long-term average

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

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

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

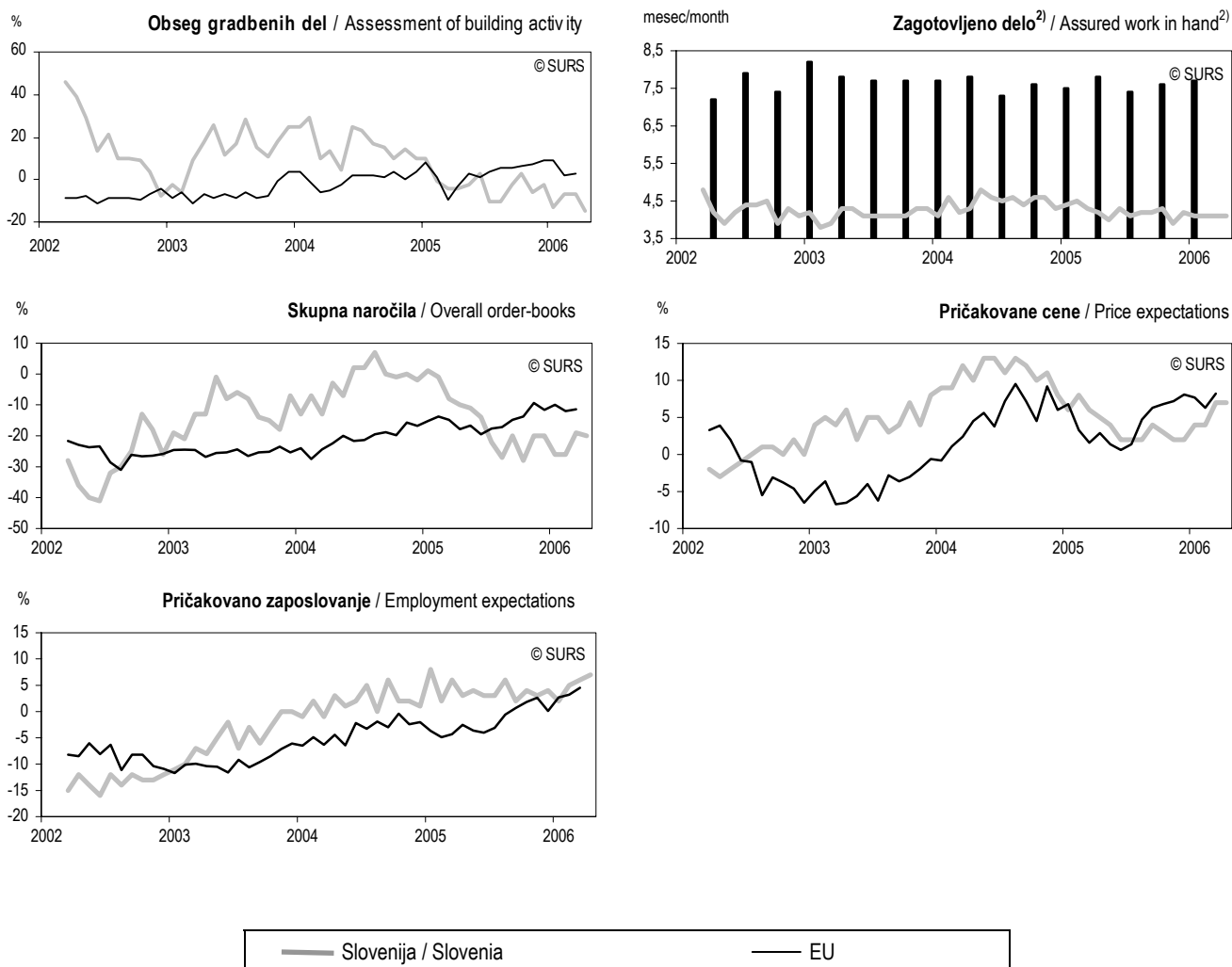


1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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–APRIL 2006<sup>1)</sup> EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN SLOVENIA AND THE EU, MARCH 2002–APRIL 2006<sup>1)</sup>

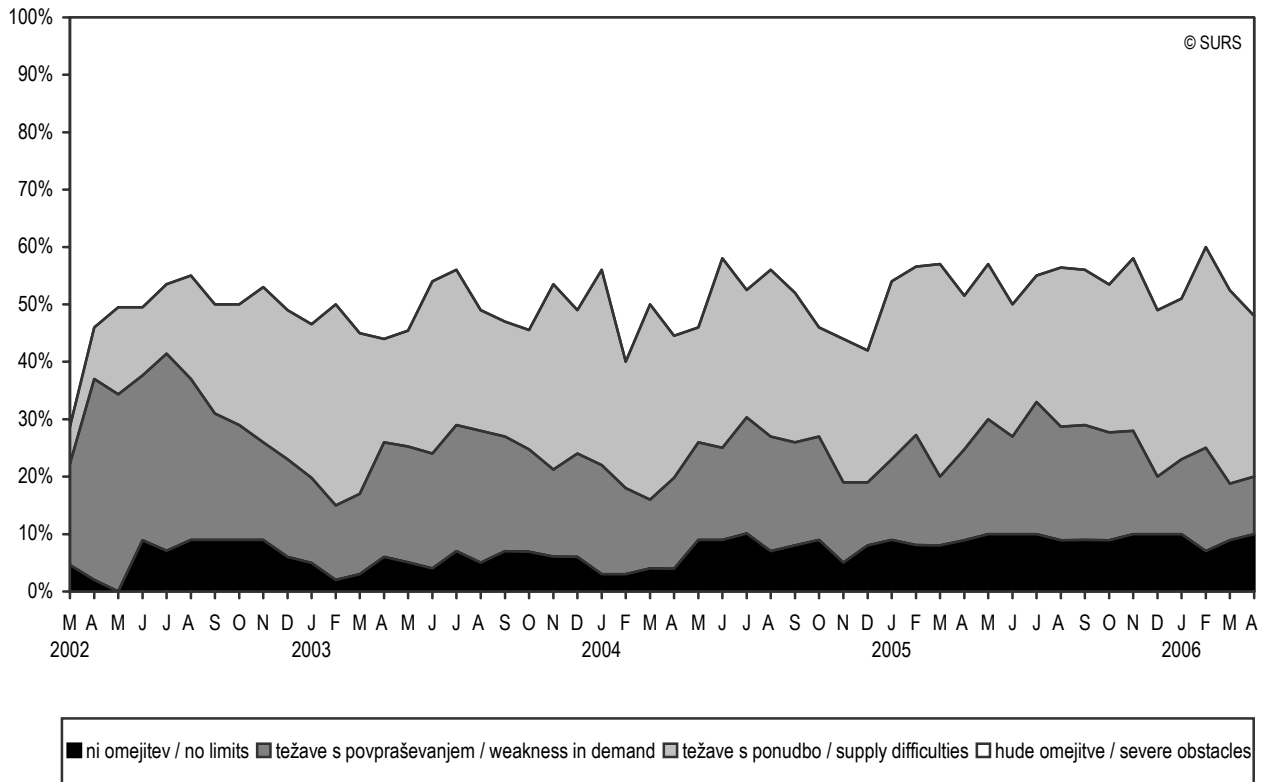


1) Vir / Source: [http://europa.eu.int/comm/economy\\_finance/indicators/businessandconsumersurveys\\_en.htm](http://europa.eu.int/comm/economy_finance/indicators/businessandconsumersurveys_en.htm). Podatki o EU za zadnji mesec niso na voljo. Podatki so desezonirani. / Data for the EU for the last month 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–APRIL 2006

FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002–APRIL 2006



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

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

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

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

## METODOLOŠKA POJASNILA

### NAMEN STATISTIČNEGA RAZISKOVANJA

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

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

### ENOTE OPAZOVANJA

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

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

### VIRI

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

### 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 DAINITIES, za Slovenijo pa z metodo TRAMO/SEATS, ki temelji na modelih ARIMA. Pri oblikovanju modelov je upoštevano časovno obdobje od marca 2002 do januarja 2006.

## 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

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



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

#### OBJAVLJANJE PODATKOV

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

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

#### VPRAŠANJA:

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

**Confidence indicator in construction** 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 SI-STAT database which is available at <http://www.stat.si/eng>.

#### QUESTIONS:

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

## KOMENTAR

Aprila 2006 so direktorji poslovne tendence v gradbeništvu ocenili boljše kot pretekli mesec. Desezonirana vrednost kazalnika zaupanja je bila za 1 odstotno točko višja kot pretekli mesec. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in 1 odstotno točko nad povprečjem lanskega leta.

## POSLOVNO STANJE

Desezonirana vrednost kazalnika poslovnega stanja je bila v primerjavi s preteklim mesecem višja za 11 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 4 odstotne točke in za 5 odstotnih točk je bila nižja od lanskega povprečja.

## OBSEG GRADBENIH DEL

Desezonirana vrednost kazalnika obsega gradbenih del je bila v primerjavi s preteklim mesecem nižja za 8 odstotnih točk. Glede na isti mesec lani je bila nižja za 11 odstotnih točk in za 13 odstotnih točk je bila nižja od povprečja lanskega leta.

## SKUPNA NAROČILA IN PRIČAKOVANA SKUPNA NAROČILA

Desezonirana vrednost kazalnika skupnih naročil se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila nižja za 10 odstotnih točk in za 5 odstotnih točk je bila nižja od lanskega povprečja.

Desezonirana vrednost kazalnika pričakovanih skupnih naročil za naslednje tri mesece se je v primerjavi s preteklim mesecem zvišala za 6 odstotnih točk. Glede na isti mesec lani je bila višja za 6 odstotnih točk in za 5 odstotnih točk je bila višja od povprečja lanskega leta.

## ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Desezonirana vrednost kazalnika zaposlovanja se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. V primerjavi z istim mesecem lani je bila nižja za 1 odstotno točko in za 3 odstotne točke je bila višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika pričakovanega zaposlovanja je bila za 1 odstotno točko višja kot pretekli mesec. Glede na isti mesec lani je bila višja za 7 odstotnih točk in za 3 odstotne točke je bila višja od lanskega povprečja.

## CENE IN CENOVNA PRIČAKOVANJA

Desezonirana vrednost kazalnika cen je bila v primerjavi s preteklim mesecem višja za 2 odstotni točki. Glede na isti mesec lani je bila višja za 4 odstotne točke in za 1 odstotno točko višja od povprečja lanskega leta.

Desezonirana vrednost kazalnika cenovnih pričakovanj za naslednje tri mesece je ostala v primerjavi s preteklim mesecem enaka. Glede na isti mesec lani je bila višja za 4 odstotne točke in za 3 odstotne točke 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 se je v primerjavi s preteklim mesecem zvišala za 6 odstotnih točk. Glede na isti mesec lani je bila višja za 2 odstotni točki in 2 odstotni točki je bila višja od lanskega povprečja.

## ZAGOTOVLJENO DELO

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

## COMMENT

In April 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 1 percentage point compared to the previous month. Compared to April 2005 it was down by 1 percentage point and 1 percentage point above last year's average.

## BUSINESS SITUATION

The seasonally adjusted value of the business situation indicator rose by 11 percentage points compared to the previous month. Compared to April 2005 it was down by 4 percentage points and compared to last year's average by 5 percentage points.

## BUILDING ACTIVITY

The seasonally adjusted value of the building activity indicator fell by 8 percentage points compared to the previous month. Compared to April 2005 and last year's average it was down by 11 and 13 percentage points respectively.

## OVERALL ORDER-BOOKS AND EXPECTED ORDER-BOOKS

The seasonally adjusted value of the overall order-books indicator fell by 1 percentage point compared to the previous month. Compared to April 2005 it was down by 10 percentage points and compared to last year's average by 5 percentage points.

The seasonally adjusted value of the expected order-books for the next three months rose by 6 percentage points compared to the previous month. Compared to April 2005 it was up by 6 percentage points and compared to last year's average it was up by 5 percentage points.

## EMPLOYMENT AND EMPLOYMENT EXPECTATIONS

The seasonally adjusted value of the employment indicator rose by 1 percentage point compared to the previous month. Compared to April 2005 it was down by 1 percentage point and compared to last year's average it was up by 3 percentage points.

The seasonally adjusted value of the expected employment indicator rose by 1 percentage point compared to the previous month. Compared to April 2005 it was up by 7 percentage points and compared to last year's average by 3 percentage points.

## PRICES AND PRICE EXPECTATIONS

The seasonally adjusted value of the prices indicator rose by 2 percentage points compared to the previous month. Compared to April 2005 it was up by 4 percentage points and was 1 percentage point above last year's average.

The seasonally adjusted value of the price expectations indicator for the next three months remained the same as in the previous month. Compared to April 2005 it was up by 4 percentage points and 3 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 was up by 6 percentage points compared to the previous month. Compared to April 2005 and to last year's average it was up 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.



V aprilu so imela podjetja s pogodbami zagotovljeno delo v povprečju za 4,1 meseca. To je za 0,1 meseca manj kot v istem mesecu lani in za 0,1 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 52 % zaposlenih (oziroma 39 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu se je z njimi srečevalo 28 % zaposlenih (oziroma 39 % podjetij).

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 10 % zaposlenih (oziroma 11 % podjetij).

10 % zaposlenih (oziroma 11 % podjetij) v tem mesecu ni imelo omejitev.

Podrobnejši pregled omejitvenih dejavnikov v gradbeništvu v tem mesecu pokaže naslednje<sup>1)</sup>:

- 42 % podjetij (ali 51 % zaposlenih) je omejevala velika konkurenca v dejavnosti;
- 40 % podjetij (ali 41 % zaposlenih) so omejevale slabe vremenske razmere;
- 32 % podjetij (ali 27 % zaposlenih) je omejevalo pomanjkanje usposobljenih delavcev;
- 29 % podjetij (ali 33 % zaposlenih) so omejevali visoki stroški dela;
- 22 % podjetij (ali 24 % zaposlenih) so omejevali visoki stroški materiala;
- 16 % podjetij (ali 24 % zaposlenih) je omejevalo nezadostno povpraševanje;
- 14 % podjetij (ali 13 % zaposlenih) so omejevali visoki finančni stroški;
- 12 % podjetij (ali 7 % zaposlenih) so omejevali drugi dejavniki;
- 7 % podjetij (ali 5 % zaposlenih) so omejevale težave pri pridobivanju kreditov;
- 2 % podjetij (ali 1 % zaposlenih) je omejevalo pomanjkanje opreme;
- 1 % podjetij (ali 0 % zaposlenih) je omejevalo pomanjkanje materialov.

Največja omejitev v gradbeništvu so velika konkurenca v dejavnosti, sledijo slabe vremenske razmere, 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 Ivanka Zobec - Angleško besedilo jezikovno uredil Boris Panič - Naklada 410 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.

In April 2006, enterprises had work assured for 4.1 months on average, which is 0.1 month less than in April 2005 and 0.1 month less than last year's average.

### LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In April 2006, 52% of employees (39% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In April 2006, 28% of employees (39% of enterprises) faced them.

The third most important obstacles were demand difficulties. In April 2006, 10% of employees (11% of enterprises) faced them.

10% of employees (11% of enterprises) experienced no obstacles in April 2006.

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

- 42% of enterprises (or 51% of employees) were limited by competition in own sector;
- 40% of enterprises (or 41% of employees) were limited by bad weather conditions;
- 32% of enterprises (or 27% of employees) were limited by shortage of skilled labour;
- 29% of enterprises (or 33% of employees) were limited by high costs of labour;
- 22% of enterprises (or 24% of employees) were limited by high costs of material;
- 16% of enterprises (or 24% of employees) were limited by insufficient demand;
- 14% of enterprises (or 13% of employees) were limited by high costs of capital;
- 12% of enterprises (or 7% of employees) were limited by other factors;
- 7% of enterprises (or 5% of employees) were limited by access to bank credits;
- 2% of enterprises (or 1% of employees) were limited by lack of equipment;
- 1% of enterprises (or 0% of employees) were limited by shortage of material.

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

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.

