



19 GRADBENIŠTVO CONSTRUCTION

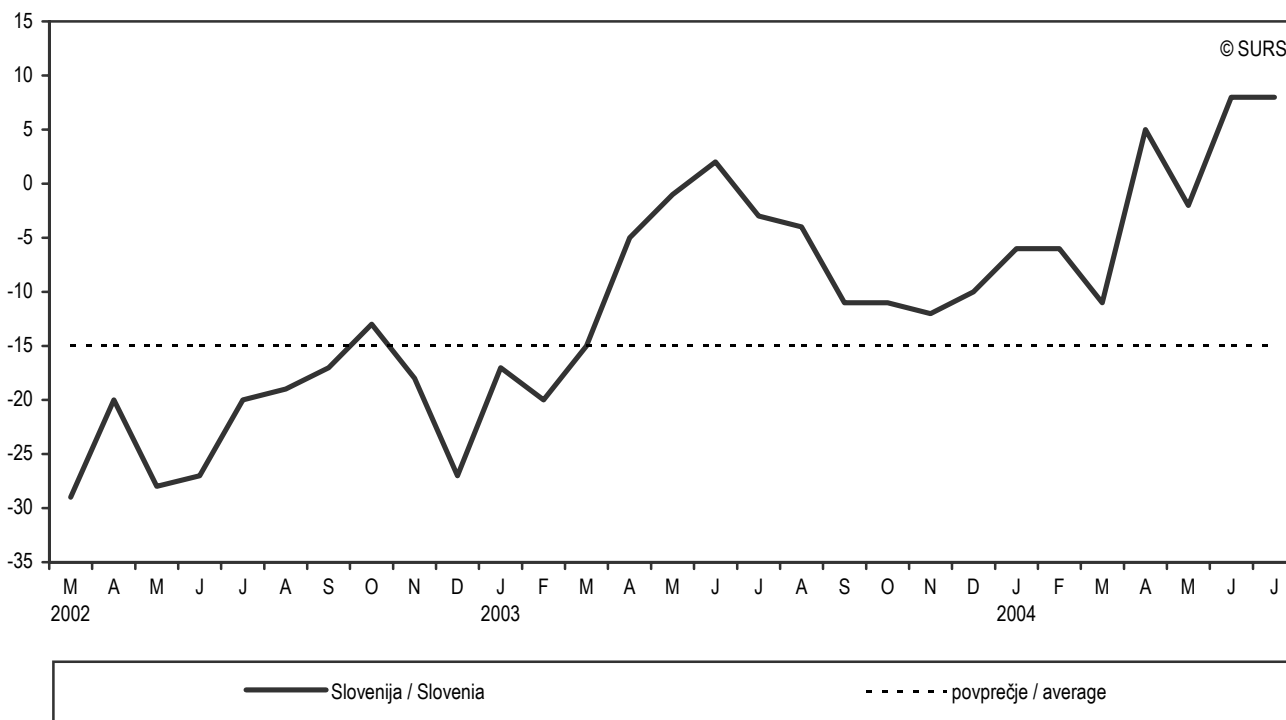
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POSLOVNE TENDENCE V GRADBENIŠTVU, SLOVENIJA, MAREC 2002 - JULIJ 2004

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

- Anketo o poslovnih tendencah v gradbeništvu izvajamo 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.
- Namen kvalitativne Ankete o poslovnih tendencah v gradbeništvu (PA-GRAD/M) je mesečno pridobivanje informacij o trenutnih stanjih glavnih ekonomskih kazalcev ter ocenitev njihovega gibanja v naslednjih mesecih. Rezultati anket so osnova za izračun kazalca zaupanja v gradbeništvu.
- Julija so direktorji tendence v gradbeništvu ocenili enako kot pretekli mesec. Kazalec zaupanja je bil v juliju enak kot v juniju. Glede na isti mesec lani je bil višji za 11 odstotnih točk, hkrati pa za 17 odstotnih točk nad lanskim povprečjem.
- The Business Tendency Survey in Construction has been carried out since March 2002 with the harmonised questionnaire, methodology and periodicity, which have been used in EU Member States for several decades.
- The purpose of the qualitative Business Tendency Survey in Construction (PA-GRAD/M) is to collect monthly information on the current situation of major economic indicators and to evaluate their development in the following months. Survey results are the basis for calculating the construction confidence indicator.
- In July 2004, managers estimated business tendencies in construction the same as in the previous month. The confidence indicator was the same as in the previous month. It rose by 11 percentage points compared to July 2003 and by 17 percentage points compared to last year's average.

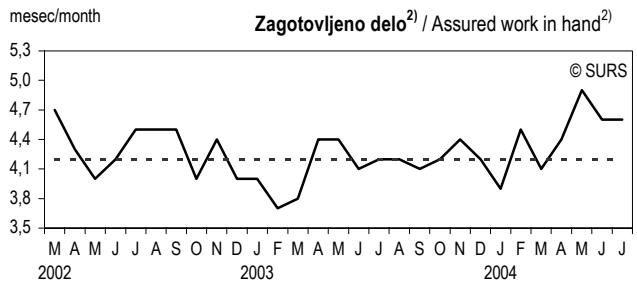
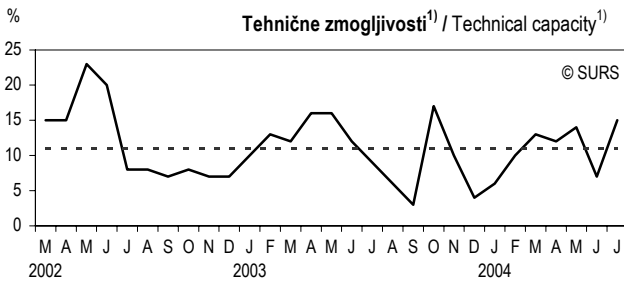
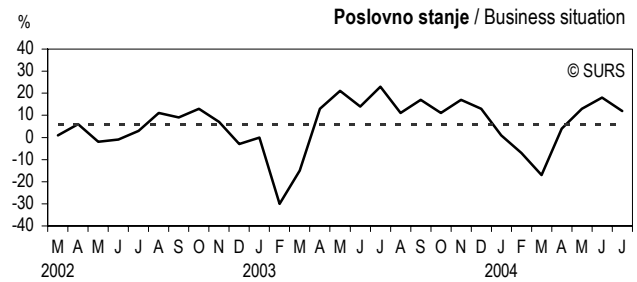
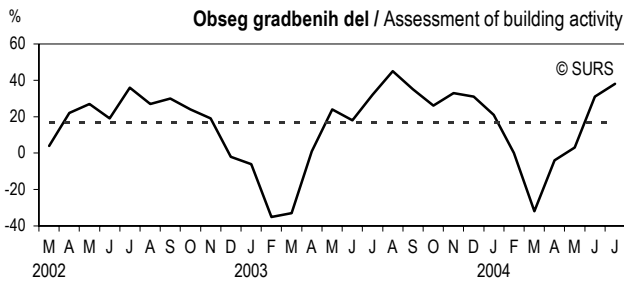
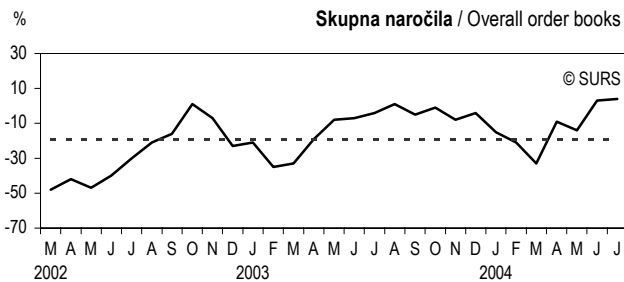
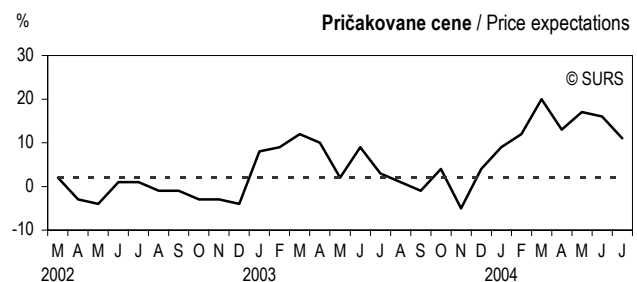
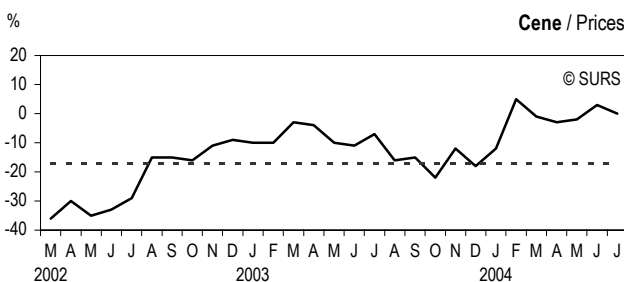
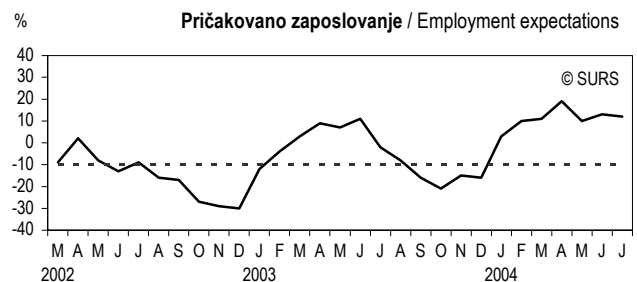
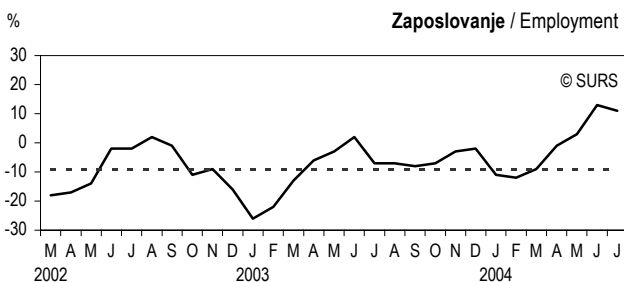
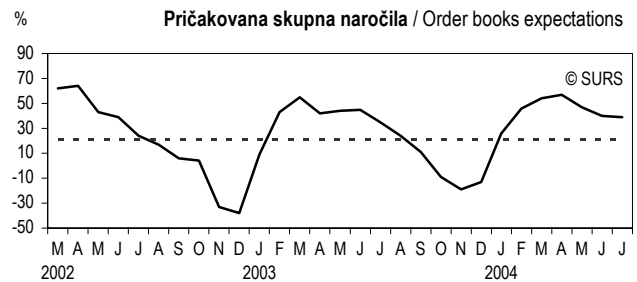
1. KAZALEC ZAUPANJA V GRADBENIŠTVU ¹⁾ CONSTRUCTION CONFIDENCE INDICATOR ¹⁾



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

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

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

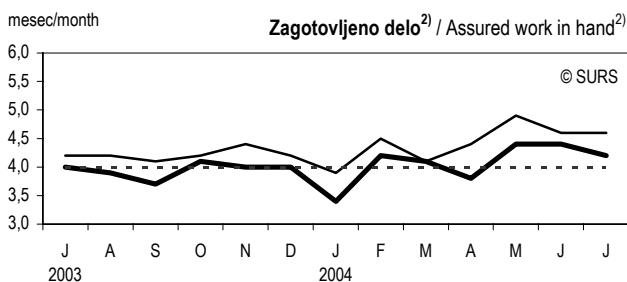
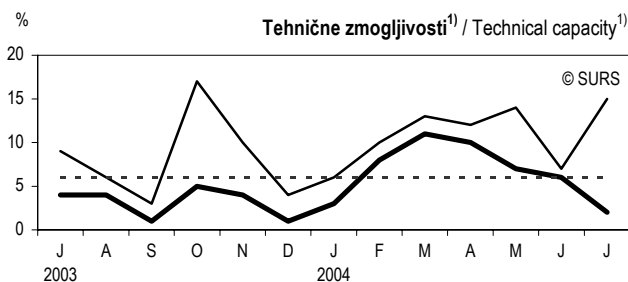
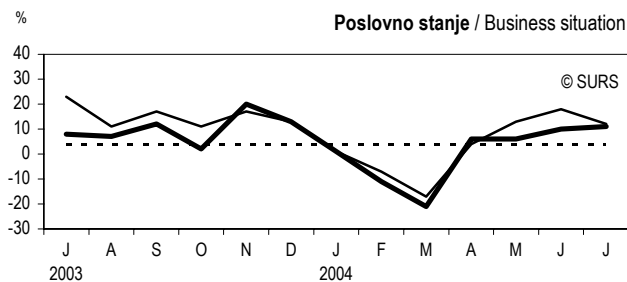
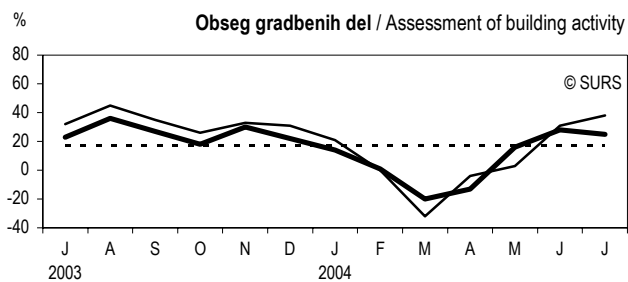
**Ocena stanja**
Appreciation of situation**Pričakovanja v naslednjih 3 mesecih**
Expectations over the next 3 months— originalni podatki
raw data- - - povprečje
average

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.

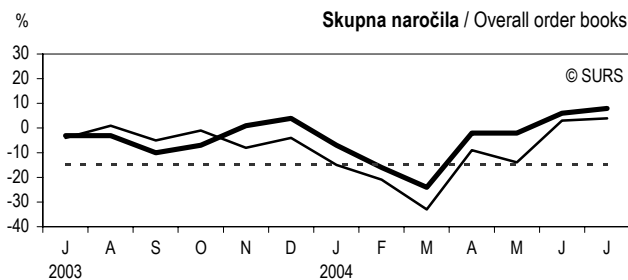
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

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

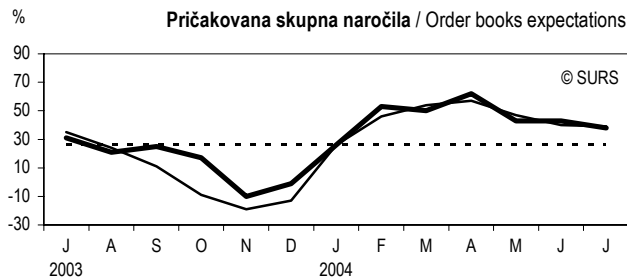
Evolution of economic indicators by the type of construction, buildings, July 2003 - July 2004



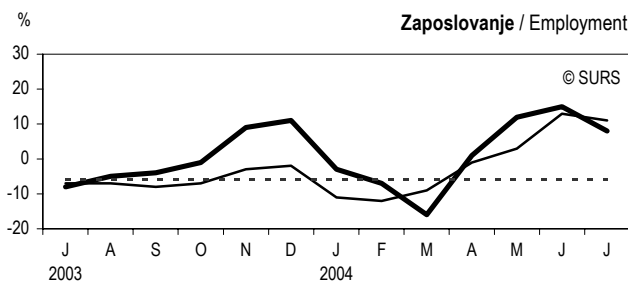
Ocena stanja / Appreciation of situation



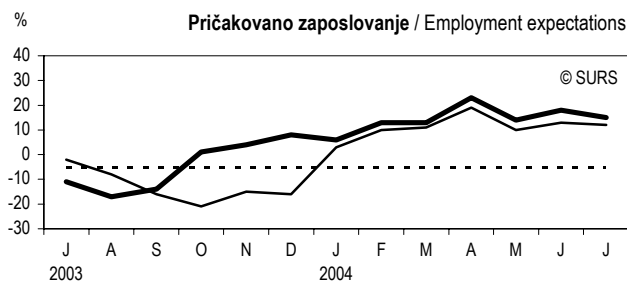
Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



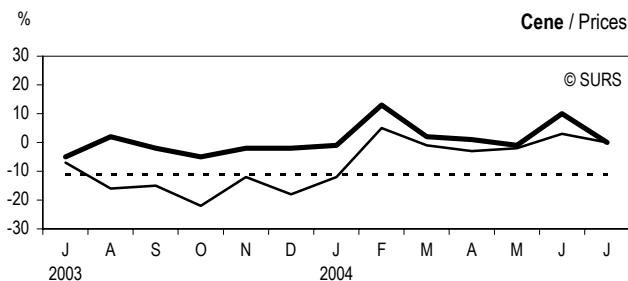
Zaposlovanje / Employment



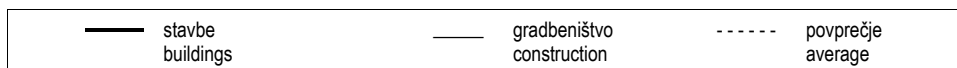
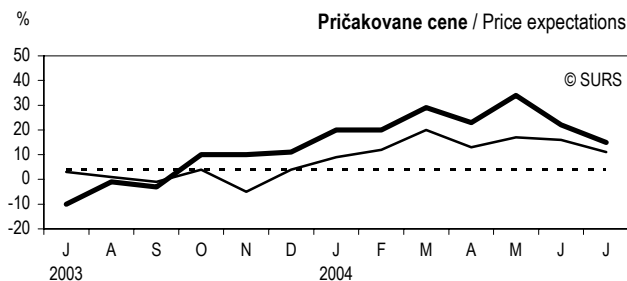
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



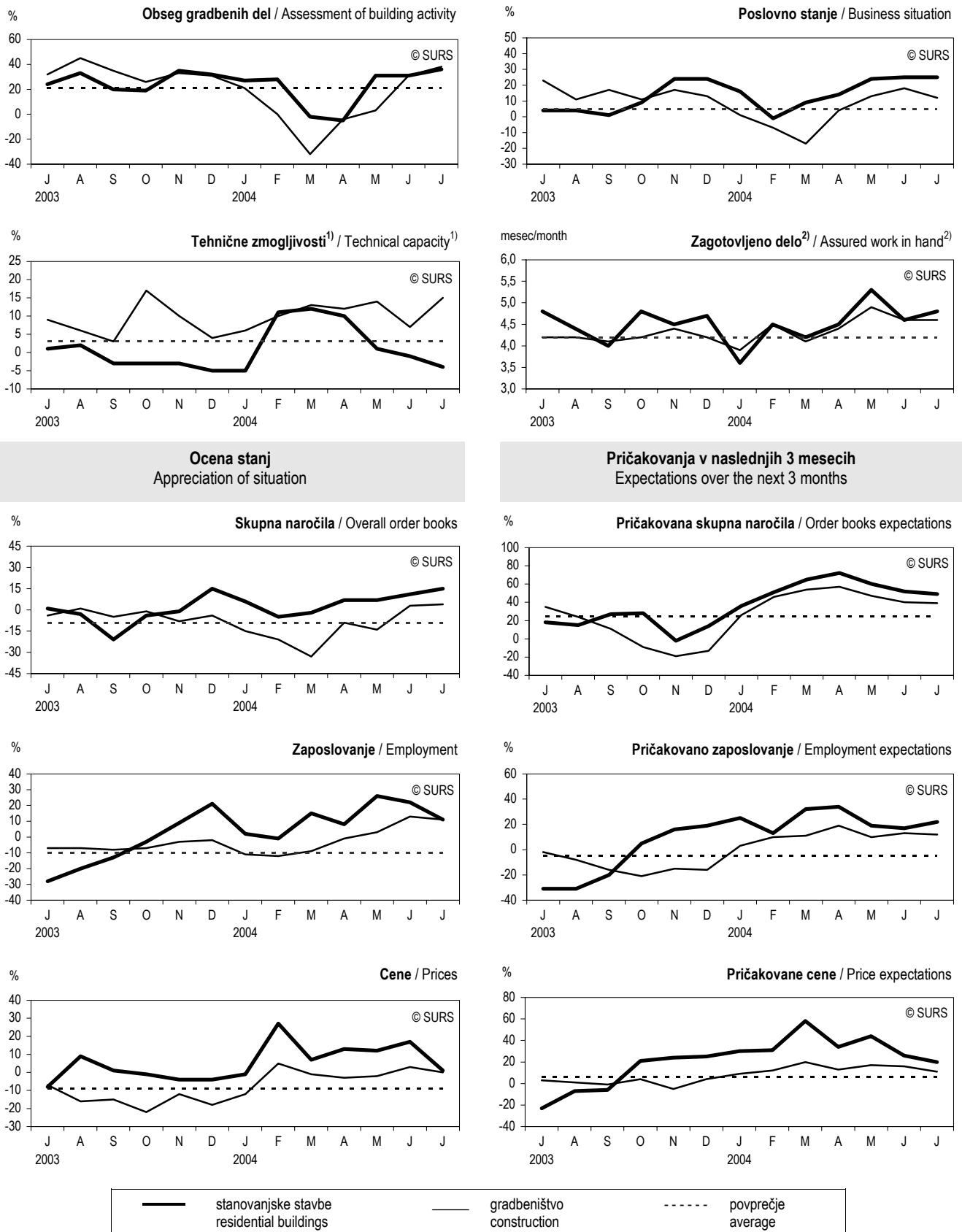
Pričakovane cene / Price expectations



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

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

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

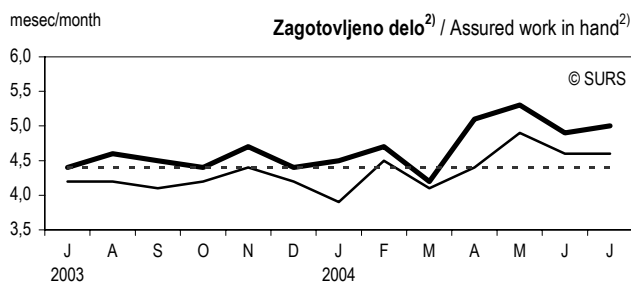
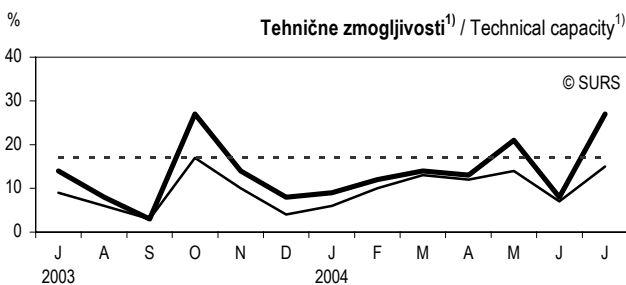
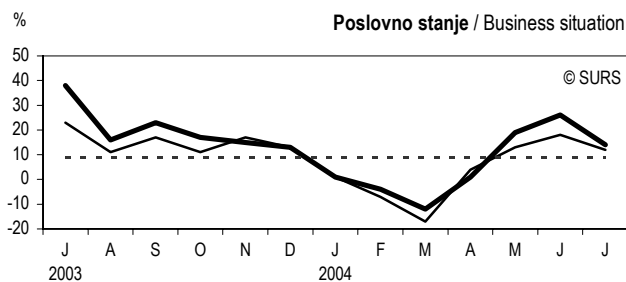
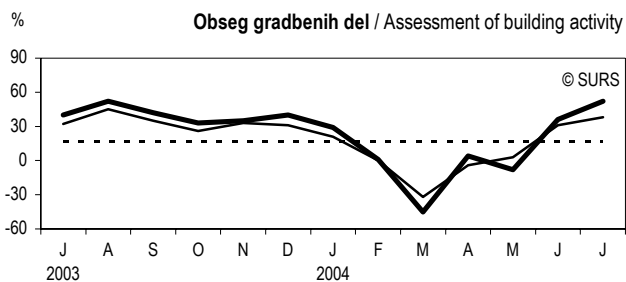


1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

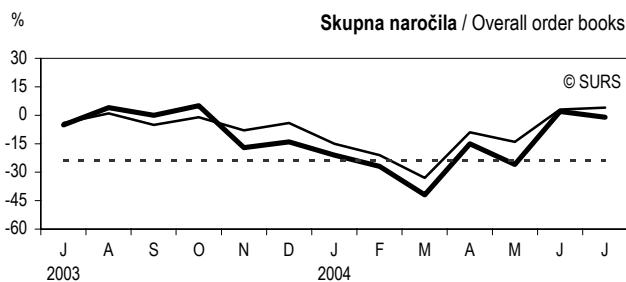
2) Že začeto ali s pogodbami dogovorjeno delo v primeru normalnih delovnih ur. / With normal working hours, works in progress and contracts in hand.

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

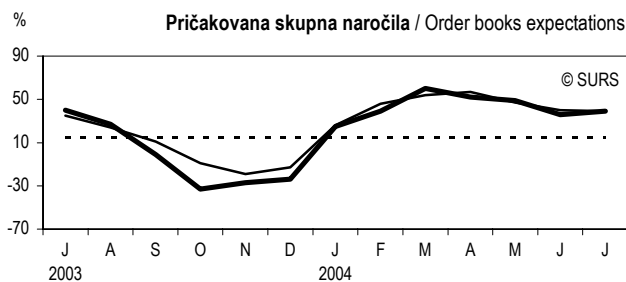
Evolution of economic indicators by the type of construction, civil engineering, July 2003 - July 2004



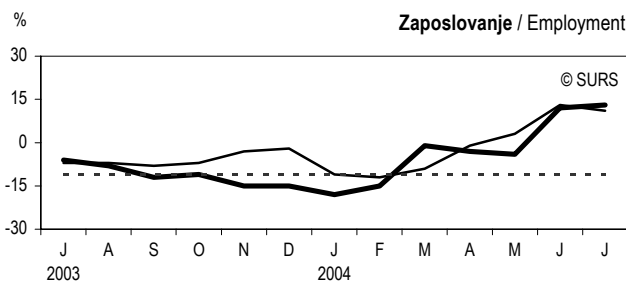
Ocena stanj
Appreciation of situation



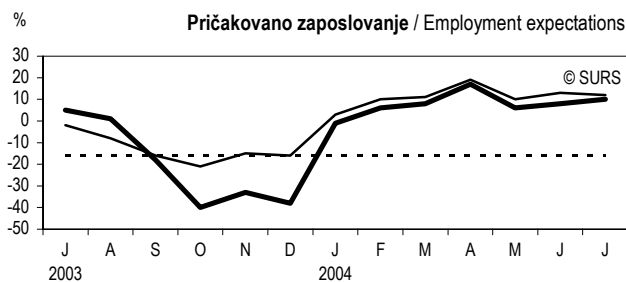
Pričakovanja v naslednjih 3 mesecih
Expectations over the next 3 months



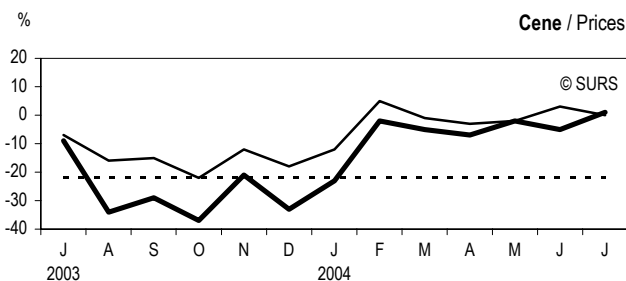
Zaposlovanje / Employment



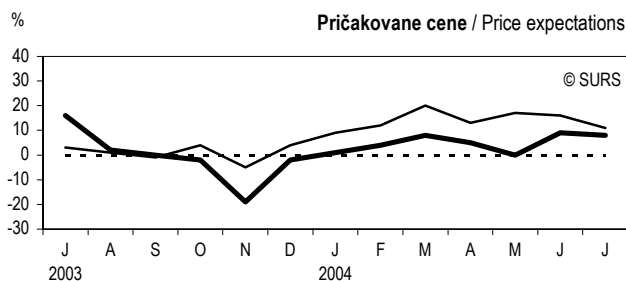
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

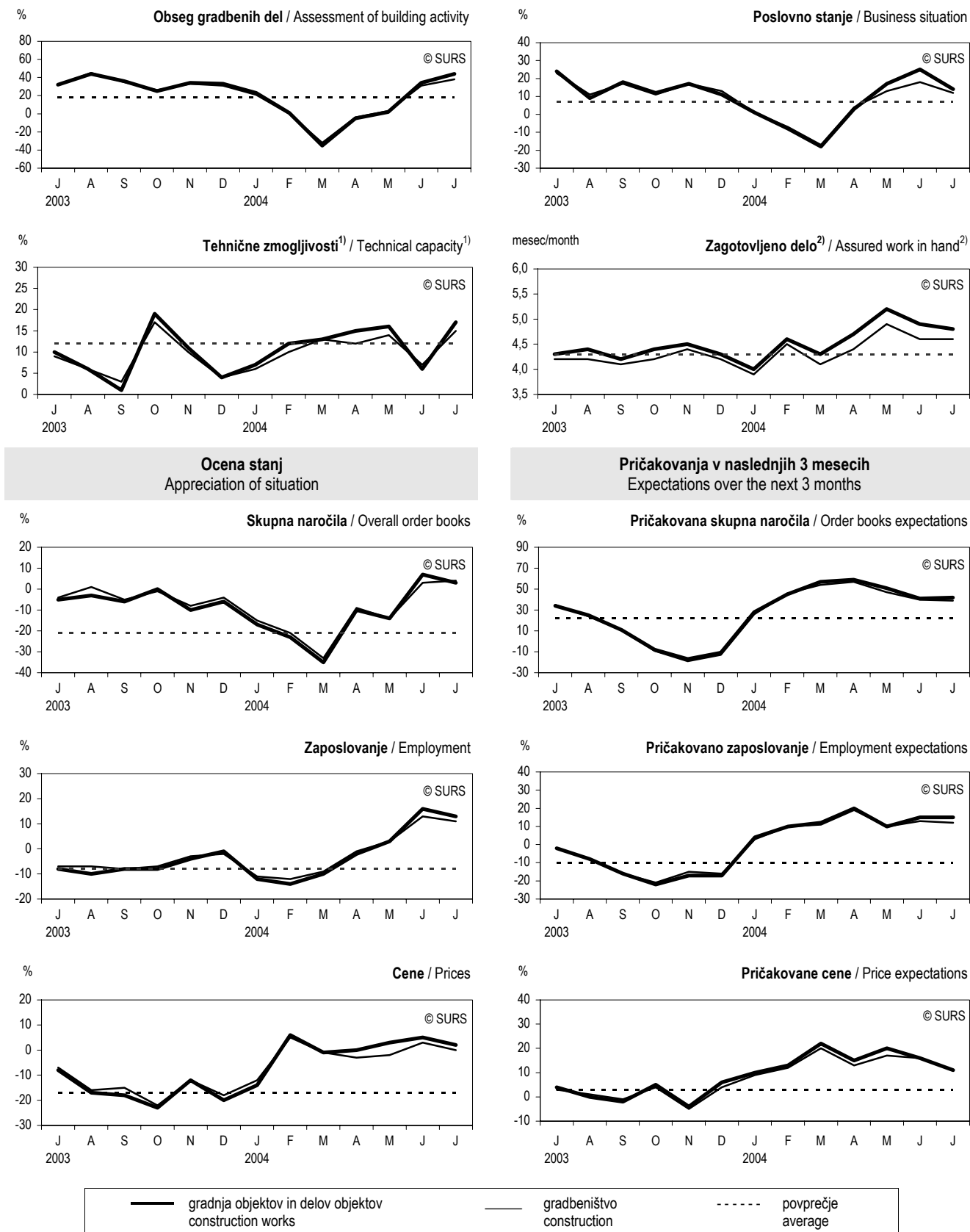


— gradbeni inženirski objekti / civil engineering — gradbeništvo / construction - - - - - povprečje / average

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

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

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



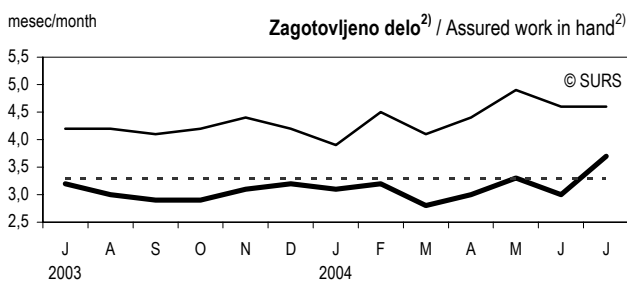
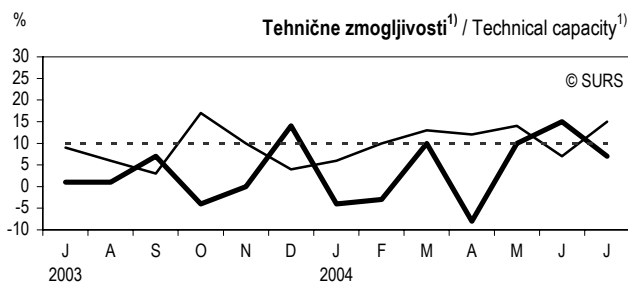
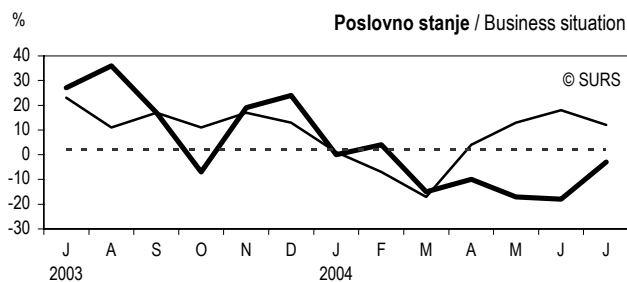
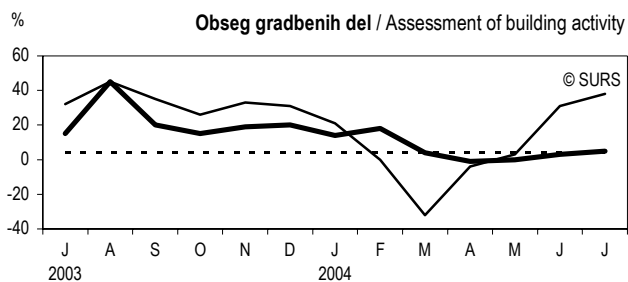
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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

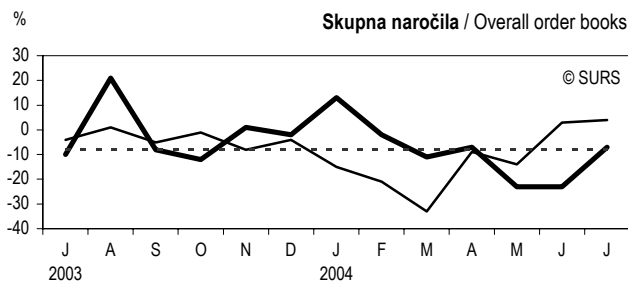


4.2 Gibanje ekonomskih kazalcev v podjetjih z dejavnostjo inštalacije pri gradnjah, julij 2003 - julij 2004

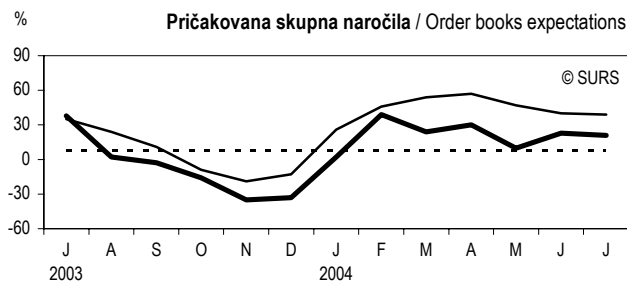
Evolution of economic indicators in enterprises engaged in installing equipment and fixtures, July 2003 - July 2004



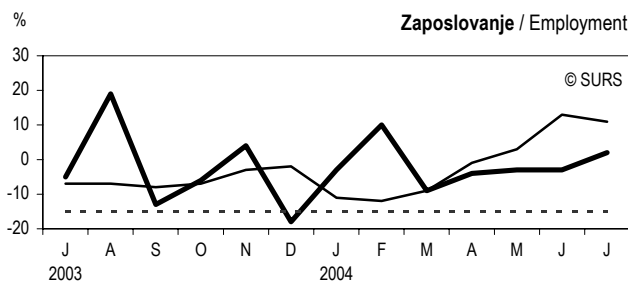
Ocena stanj / Appreciation of situation



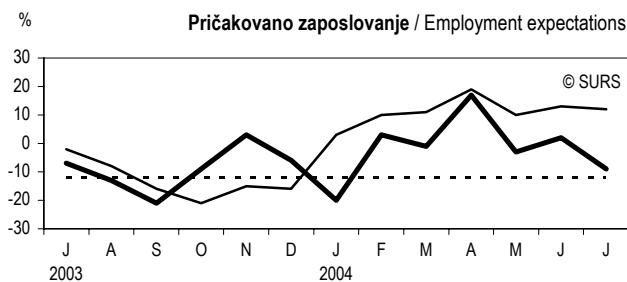
Pričakovanja v naslednjih 3 mesecih / Expectations over the next 3 months



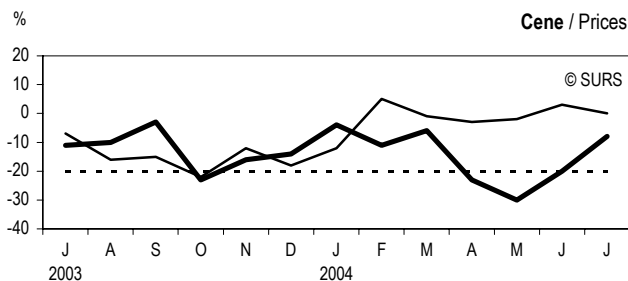
Zaposlovanje / Employment



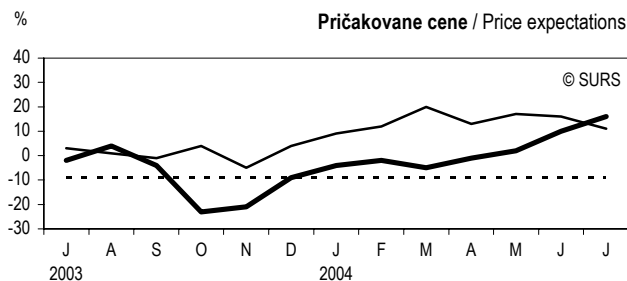
Pričakovano zaposlovanje / Employment expectations



Cene / Prices



Pričakovane cene / Price expectations

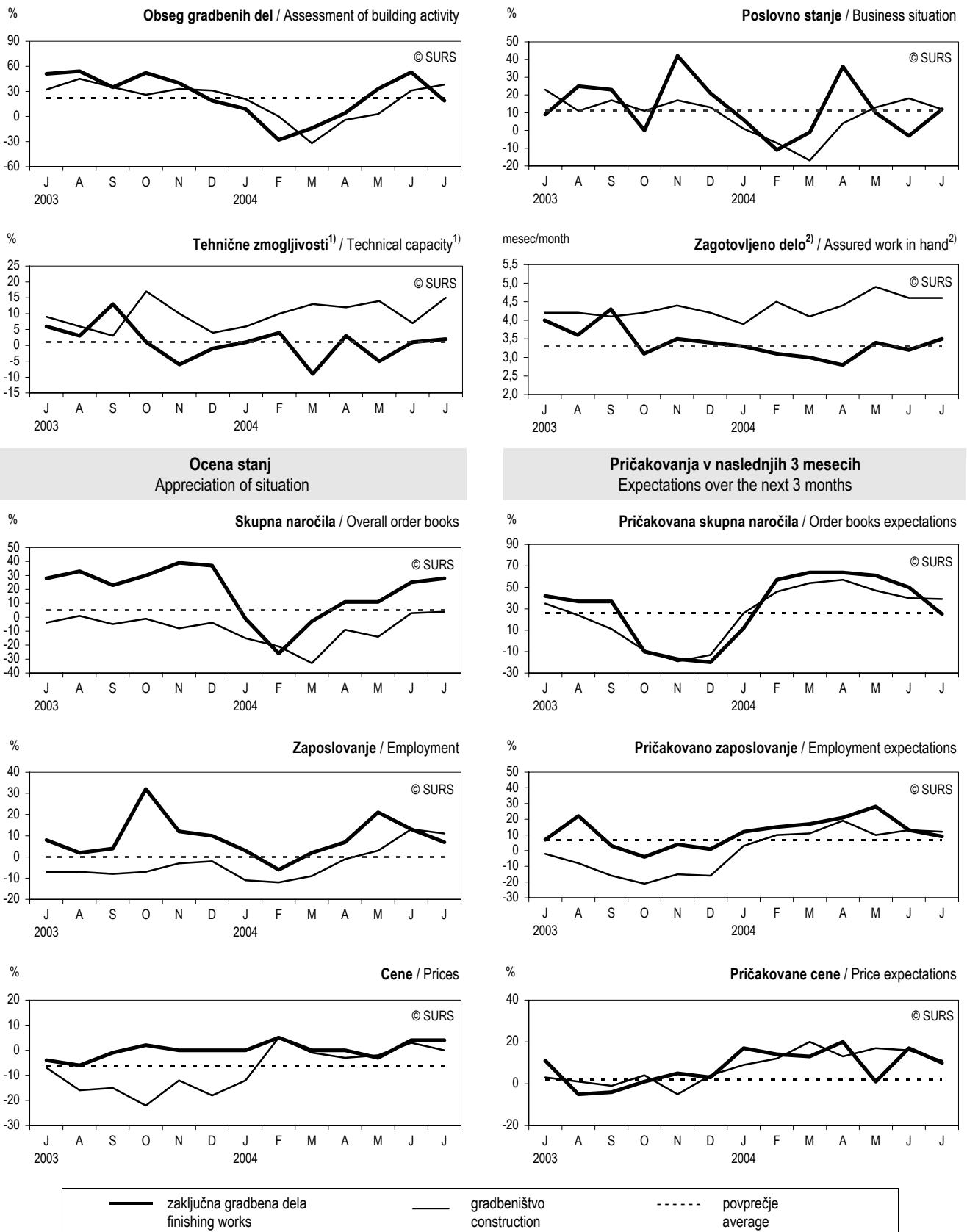


— inštalacije pri gradnjah / installation of equipment and fixtures
 — gradbeništvo / construction
 - - - - - povprečje / average

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

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

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



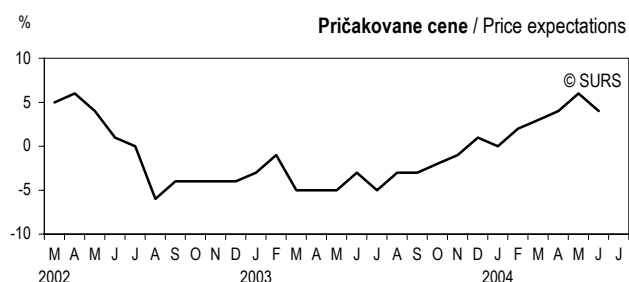
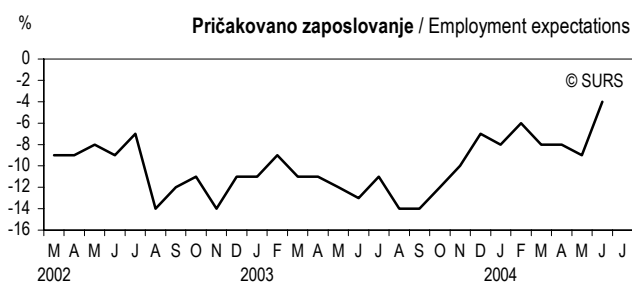
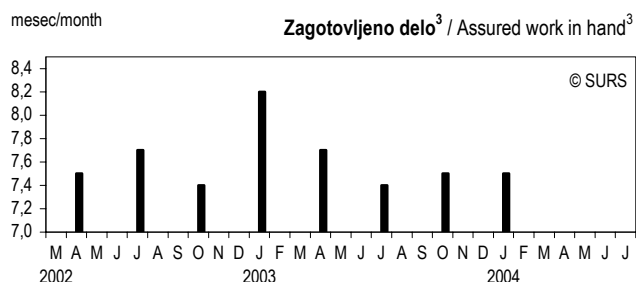
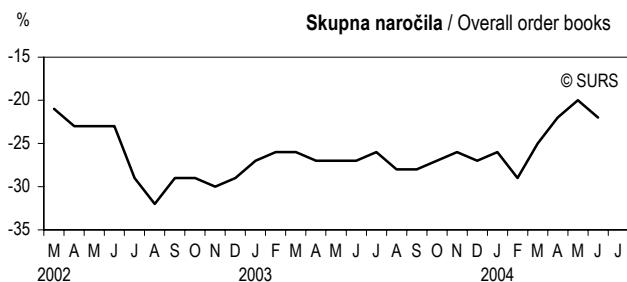
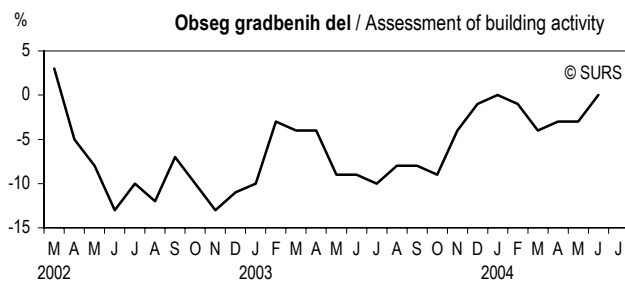
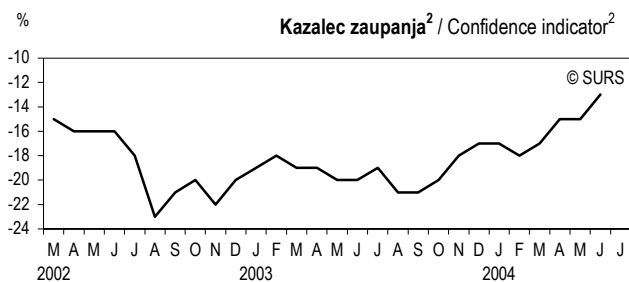
1) Količina in kakovost opreme glede na povpraševanje v naslednjih 12 mesecih. / Amount and quality of equipment regarding expected demand in the next 12 months.

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



5. GIBANJE EKONOMSKIH KAZALCEV V GRADBENIŠTVU V EU, MAREC 2002 - JULIJ 2004¹⁾

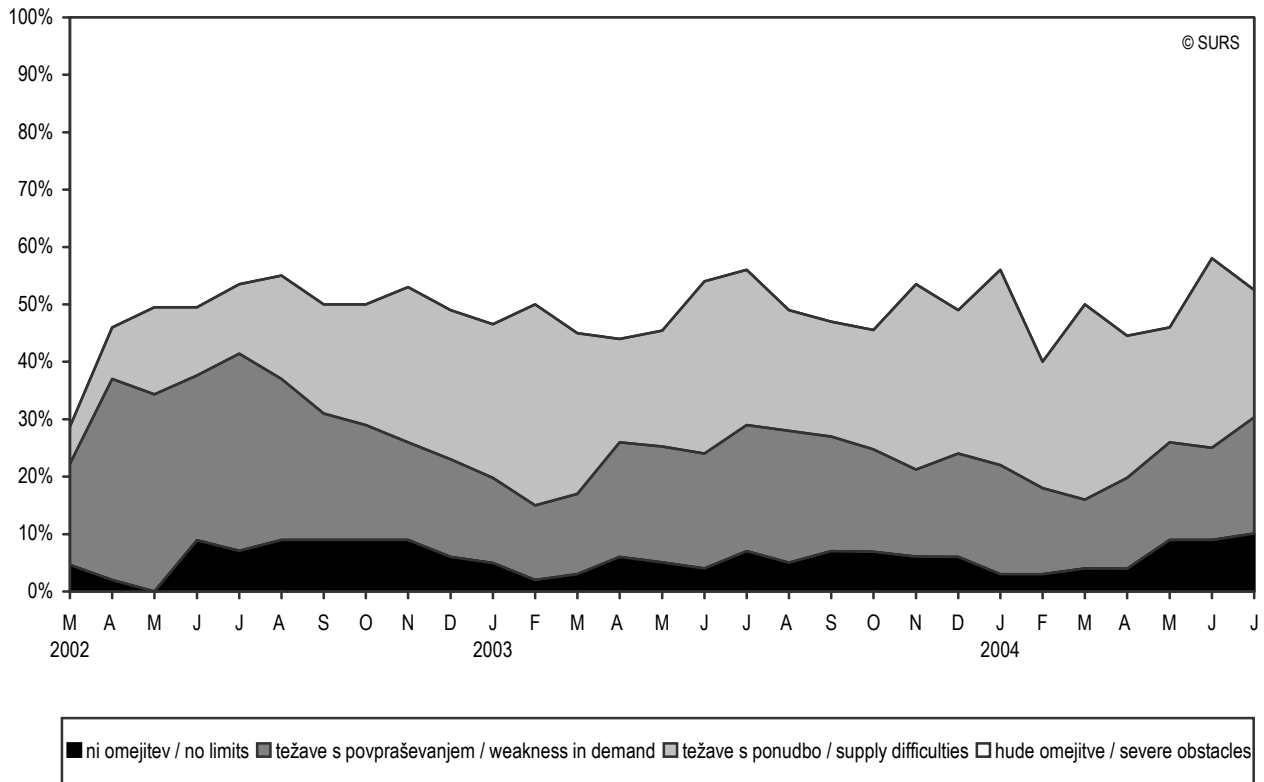
EVOLUTION OF ECONOMIC INDICATORS IN CONSTRUCTION IN THE EU, MARCH 2002 – JULY 2004¹⁾



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

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

FACTORS LIMITING BUILDING ACTIVITY IN SLOVENIA, MARCH 2002 - JULY 2004



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

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

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

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

METODOLOŠKA POJASNILA

NAMEN STATISTIČNEGA RAZISKOVANJA

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

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

ENOTE OPAZOVANJA

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

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

VIRI

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

ZAJETJE

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

NAČIN ZBIRANJA PODATKOV

Anketo izvajamo mesečno po pošti.

UTEŽEVANJE ODGOVOROV

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

NEODGOVORI

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

DEFINICIJE

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

METHODOLOGICAL EXPLANATIONS

PURPOSE OF STATISTICAL SURVEY

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

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

OBSERVATION UNITS

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

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

SOURCES

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

COVERAGE

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

METHOD OF DATA COLLECTING

The survey is carried out monthly by mail.

WEIGHTS FOR RESPONSES

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

NON-RESPONSES

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

DEFINITIONS

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

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

OBJAVLJANJE PODATKOV

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

Ostalim uporabnikom so dostopni podatki na ravni gradbeništva in njegovih skupin ter podatki glede na vrsto gradnje. Slednji so mesečno objavljeni v Statističnih informacijah – Poslovne tendence v gradbeništvu.

VPRAŠANJA:

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

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

PUBLISHING

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

Other users can get data for construction and its groups, size of enterprises and type of construction. Data are published in the Rapid Reports – Business Tendency in Construction.

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

Julija so direktorji tendence v gradbeništvu ocenili enako kot pretekli mesec. Kazalec zaupanja je bil v juliju enak kot v juniju. Glede na isti mesec lani je bil višji za 11 odstotnih točk, hkrati pa za 17 odstotnih točk nad lanskim povprečjem.

POSLOVNO STANJE

Ocena poslovnega stanja se je v primerjavi s preteklim mesecem znižala za 6 odstotnih točk. V primerjavi z istim mesecem lani je bila nižja za 11 odstotnih točk in 4 odstotne točke nad lanskim povprečjem.

OBSEG GRADBENIH DEL

Ocena obsega gradbenih del se je v primerjavi s preteklim mesecem zvišala za 7 odstotnih točk. V primerjavi z istim mesecem lani je bila višja za 6 odstotnih točk in 24 odstotnih točk nad povprečjem lanskega leta.

SKUPNA NAROČILA IN PRIČAKOVANA SKUPNA NAROČILA

Vrednost kazalca skupnih naročil se je v primerjavi s preteklim mesecem zvišala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 8 odstotnih točk in za 16 odstotnih točk nad lanskim povprečjem.

Vrednost kazalca pričakovanih skupnih naročil za naslednje 3 mesece se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 4 odstotne točke in za 17 odstotnih točk nad lanskim povprečjem.

ZAPOSLOVANJE IN PRIČAKOVANO ZAPOSLOVANJE

Ocena zaposlovanja se je v primerjavi s preteklim mesecem znižala za 2 odstotni točki. V primerjavi z istim mesecem lani je bila višja za 18 odstotnih točk in 20 odstotnih točk nad povprečjem lanskega leta.

Ocena pričakovanega zaposlovanja se je v primerjavi s preteklim mesecem znižala za 1 odstotno točko. Glede na isti mesec lani je bila višja za 14 odstotnih točk in 17 odstotnih točk nad povprečjem lanskega leta.

CENE IN CENOVNA PRIČAKOVANJA

Vrednost kazalca cen se je v primerjavi s preteklim mesecem znižala za 3 odstotne točke. Glede na isti mesec lani je bila višja za 7 odstotnih točk in 12 odstotnih točk nad lanskim povprečjem.

Cenovna pričakovanja za naslednje 3 mesece so se v primerjavi s preteklim mesecem znižala za 5 odstotnih točk. Glede na isti mesec lani so bila višja za 8 odstotnih točk in 6 odstotnih točk nad povprečjem lanskega leta.

TEHNIČNE ZMOGLJIVOSTI

Vrednost kazalca tehničnih zmogljivosti vključuje oceno

COMMENT

In July 2004, managers estimated business tendencies in construction the same as in the previous month. The confidence indicator was the same as in the previous month. It rose by 11 percentage points compared to July 2003 and by 17 percentage points compared to last year's average.

BUSINESS SITUATION

The evaluation of the business situation fell by 6 percentage points compared to the previous month. Compared to July 2003 it was down by 11 percentage points and 4 percentage points above last year's average.

BUILDING ACTIVITY

The evaluation of the building activity rose by 7 percentage points compared to the previous month. Compared to July 2003 it was up by 6 percentage points and compared to last year's average by 24 percentage points.

OVERALL ORDERS AND EXPECTED ORDERS

The value of the overall orders indicator rose by 1 percentage point compared to the previous month. Compared to July 2003 it was up by 8 percentage points and compared to last year's average by 16 percentage points.

The value of the expected orders for the next three months fell by 1 percentage point compared to the previous month. Compared to July 2003 it was up by 4 percentage points and but 17 percentage points above last year's average.

EMPLOYMENT AND EXPECTED EMPLOYMENT

The evaluation of the employment indicator fell by 2 percentage points compared to the previous month. Compared to July 2003 it was up by 18 percentage points and compared to last year's average by 20 percentage points.

The evaluation of expected employment fell by 1 percentage point compared to the previous month. Compared to July 2003 it was up by 14 percentage points and compared to last year's average by 17 percentage points.

PRICES AND PRICE EXPECTATIONS

The value of the prices indicator fell by 3 percentage points compared to the previous month. Compared to July 2003 it was up by 7 percentage points and compared to last year's average by 12 percentage points.

Price expectations for the next three months fell by 5 percentage points compared to the previous month. Compared to July 2003 they were up by 8 percentage points and compared to last year's average by 6 percentage points.

TECHNICAL CAPACITY

The value of the technical capacity indicator includes the



količine in kakovosti opreme glede na povpraševanje v naslednjih 12 mesecih.

Kazalec se je v primerjavi s preteklim mesecem zvišal za 8 odstotnih točk. Glede na isti mesec lani je bil višji za 6 odstotnih točk in 4 odstotne točke nad povprečjem lanskega leta.

ZAGOTOVLJENO DELO

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

V juliju imajo podjetja s pogodbami zagotovljeno delo v povprečju za 4,6 meseca. Vrednost kazalca se je v primerjavi s preteklim mesecem ostala enaka. Glede na isti mesec lani je bila višja za 0,4 meseca in za 1 mesec nad povprečjem lanskega leta.

OMEJITVENI DEJAVNIKI

Med omejitvenimi dejavniki v gradbeništvu so prevladovali dejavniki iz skupine hude omejitve. V tem mesecu se je z njimi spopadalo 47 % zaposlenih (oziroma 39 % podjetij).

Sledili so omejitveni dejavniki iz skupine težave s ponudbo. V tem mesecu je take težave imelo 22 % zaposlenih (oziroma 34 % podjetij).

Z dejavniki iz skupine šibko povpraševanje se je v tem mesecu srečalo 20 % zaposlenih (oziroma 18 % podjetij).

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

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

- 51 % podjetij (ali 62 % zaposlenih) omejevala velika konkurenca v dejavnosti;
- 29 % podjetij (ali 23 % zaposlenih) omejevalo pomanjkanje usposobljenih delavcev;
- 30 % podjetij (ali 26 % zaposlenih) omejevali visoki stroški dela;
- 26 % podjetij (ali 24 % zaposlenih) omejevali visoki stroški materiala;
- 21 % podjetij (ali 22 % zaposlenih) omejevali slabi vremenski pogoji;
- 19 % podjetij (ali 17 % zaposlenih) omejevali visoki finančni stroški;
- 16 % podjetij (ali 15 % zaposlenih) omejevalo nezadostno povpraševanje;
- 11 % podjetij (ali 6 % zaposlenih) omejevali drugi dejavniki;

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 July 2003 it was up by 6 percentage points and compared to last year's average by 4 percentage points.

ASSURED WORK

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

In July 2004, enterprises had work assured for 4.6 months on average. The indicator remained the same as in the previous month. Compared to July 2003 it was up by 0.4 month and 1 month above last year's average.

LIMITING FACTORS

Among factors limiting building activity, severe obstacles prevailed. In July 2004, 47% of employees (39% of enterprises) were faced with them.

The second most important obstacles were supply difficulties. In July 2004, 22% of employees (34% of enterprises) faced them.

The third most important obstacles were demand difficulties. In July 2004, 20% of employees (18% of enterprises) faced them.

Only 10% of employees (9% of enterprises) experienced no obstacles in July 2004.

A more detailed overview of factors limiting building activity shows that in July:¹

- 51% of enterprises (or 62% of employees) were limited by competition in own sector;
- 29% of enterprises (or 23% of employees) were limited by shortage of skilled labour;
- 30% of enterprises (or 26% of employees) were limited by high costs of labour;
- 26% of enterprises (or 24% of employees) were limited by high costs of material;
- 21% of enterprises (or 22% of employees) were limited by bad weather conditions;
- 19% of enterprises (or 17% of employees) were limited by high costs of capital;
- 16% of enterprises (or 15% of employees) were limited by insufficient demand;
- 11% of enterprises (or 6% of employees) were limited by other factors;

¹ Podjetja lahko označijo več dejavnikov, ki omejujejo njihovo proizvodnjo, zato vsota odstotkov ni 100.

Enterprises can select several factors limiting their business, so the total is not 100%.

- 10 % podjetij (ali 7 % zaposlenih) omejevale težave pri pridobivanju kreditov;
 - 6 % podjetij (ali 10 % zaposlenih) ni imelo omejitev;
 - 2 % podjetij (ali 1 % zaposlenih) omejevalo pomanjkanje opreme;
 - 1 % podjetij (ali 1 % zaposlenih) omejevalo pomanjkanje materialov.
- 10% of enterprises (or 7% of employees) were limited by access to bank credits;
 - 6% of enterprises (or 10% of employees) experienced no limits;
 - 2% of enterprises (or 1% of employees) were limited by lack of equipment;
 - 1% of enterprises (or 1% of employees) were limited by shortage of material.

Največja omejitev v gradbeništvu je bila velika konkurenca v dejavnosti, sledila sta dejavnika pomanjkanje usposobljenih delavcev in visoki stroški dela.

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

Le 9 % podjetij v gradbeništvu ni imelo omejitev.

Only 9% of enterprises experienced no limits in building activity.

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