

Construction confidence indicator in October 2019

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In October compared with the previous month, the **confidence indicator** Construction confidence indicator [kp0006ms] in Balances of monthly (quarterly) questions and the composite construction confidence indicator [kp0011ms] **construction** increased by 6 points to -9,0 due to more favourable evaluations of the overall level of orders. The current result is exceeding the long-term average by 16 points.

Compared with the situation in the previous month, the indicator of the **building activity trend over the past three months** improved by 14 points to 28, mainly due to enterprises performing construction of buildings. An increase of the construction activity was recorded by 45 % of respondents, its decrease by 3 % of respondents, and 52 % of enterprises considered it to be unchanged. Compared with September, the evaluation of the **current level of overall order books** improved by 13 points to -13, mainly due to enterprises performing construction of buildings. 4 % of respondents consider them to be more than sufficient, 84 % sufficient and for 12 % of them the current level of orders was insufficient. 35 % of respondents included shortage of employees, 30 % financial constraints, 25 % insufficient demand, 11 % weather conditions and 5 % lack of materials and mechanisms into the most significant **factors* limiting a growth of construction production currently**. Respondents also report: lack of qualified staff, lack of transparency of public procurement, payment recklessness of customers and from it resulting secondary insolvency. 28% of enterprises do not see any barriers of growth currently. Expectations of respondents in estimation of the employment development deteriorated month-on-month, the business balance of the **expected number of employees**, decreased by 1 point to -5. Over the next three months, 21 % of respondents expect a decrease of employment, 68 % expect a stable development and 11 % of enterprises expect an increase. Compared with August, the business balance of the expected **construction production prices over the next three months** remained unchanged, at the current value 6.9 % of respondents expect an increase in the number of employees, 88 % do not expect changes and 3 % of enterprises assume a decrease.

Based on orders, companies have **reserved work** for 13,2 months, on average. By size categories, production is ensured mostly in enterprises employing 500 and more people (21,9 months) and in enterprises performing civil engineering (15,4 months) as regards production specification. In territorial terms, respondents have the most orders upon contract in the region of Bratislava (18,3 months) and the lowest number is in the region of Trnava (4,2 months).

Note: * In October 2019, 356 respondents participated in the survey representing the entire construction sector. The values of the confidence indicator in construction and the balances range from -100 (responses of all respondents are pessimistic) to 100 (responses of all respondents are optimistic). Data are seasonally adjusted.

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