

Informations *Rapides*

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■ Quarterly business survey in civil engineering – January 2018

In January 2018, the economic climate weakens slightly in civil engineering

According to the business managers surveyed in January 2018, the economic climate in civil engineering has weakened slightly compared to the previous quarter. The civil engineering professionals remain however confident: all the balances of opinion remain far above their long-term average.

Business managers are slightly less optimistic on their activity prospects

In January 2018, more business managers than in October 2017 have indicated an increase in their past activity for both public-sector and private-sector projects. The corresponding balances of opinion have increased and stand well above their long-term average. In contrast, in January slightly fewer business managers forecast an increase in their activity over the next three months. The corresponding balance has fallen back, regardless of the type of customers (public sector and private sector), while remaining well above its long-term average. However, order books have continued to fill up; the corresponding balance of opinion has improved again and has exceeded its long-term average even more.

Increasingly insufficient workforce

In January 2018, more business managers than in October 2017 have reported obstacles to production due to workforce shortage. At the beginning of this year, 40% of businesses have indicated being hampered because of workforce shortage against 15% on long-term average. This share has increased continuously since April 2017 and has reached in January 2018 its highest level since April 2008.

Fewer business managers forecast an increase in their staff size over the next few months

For the first time since summer 2016, fewer business managers than in the last quarter plan to increase their workforce in the next few months. The corresponding balance has slipped back while remaining far above its long-term average.

Public works economic outlook

Balances of opinion, in %, SA

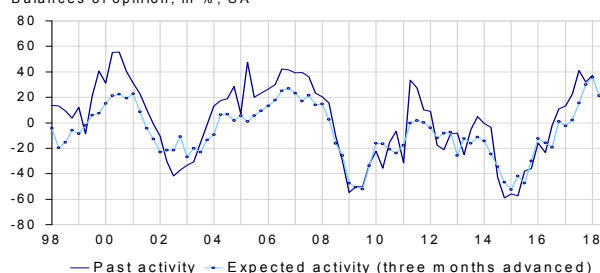
	Mean*	April 17	July 17	Oct. 17	Jan. 18
Past activity	-6	22	41	32	37
- public-sector project	-12	12	28	20	23
- private-sector project	-10	17	28	28	32
Expected activity	-14	16	30	36	21
- public-sector project	-17	10	19	23	17
- private-sector project	-16	11	21	29	16
Opinion on order books	-26	-10	1	11	14
Obstacles to production increase because of workforce shortage (in %)	15	19	32	35	40
Expected workforce	-15	12	32	37	29

Note: the balances of opinion by customer may differ from the balance of the whole, because sometimes the firms don't distinguish public-sector project and private-sector project.

* Mean since January 1981

Activity tendency in civil engineering

Balances of opinion, in %, SA



For further information

The balance of opinion is the difference between the percentage of responses "increase" and the percentage of responses "decrease".

- Additional information (long series, methodology, links, etc.) is available on the web page of this indicator: <https://www.insee.fr/en/statistiques?debut=0&theme=30&conjoncture=12>
- Historical data are available on the BDM : <https://www.insee.fr/en/statistiques/series/102874976>
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