Insee Informations Rapides

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Quaterly survey of public works - January 2019

In January 2019, business managers in civil engineering are less enthusiastic about their past and future activity

According to the business managers surveyed in January 2019, the economic climate in civil engineering is less favourable compared to the previous quarter. However, the civil engineering professionals remain confident: all the balances of opinion stand well above their long-term average.

Business managers' opinion on their past activity deteriorates

In January 2019, fewer business managers than in October 2018 have indicated an increase in their activity over the last three months. After having reached in October 2018 its highest level in twelve years, the corresponding balance of opinion has slipped back while remaining largely above its long-term average. This downturn concerns both public sector and private clients. Likewise, fewer business managers than in October forecast an increase in their activity over the next three months. The corresponding balance has decreased for both types of clients but remains in both cases well above its long-term average. However, more business managers deem that their order books remain well filled; the corresponding balance of opinion has increased and has reached its highest level in eleven years, far above its long-term average.

The lack of workforce is less critical

In January 2019, the obstacles to production increase due to workforce shortage have eased. Indeed, 36% of businesses have indicated being hampered because of workforce shortage against 49% in the previous quarter. Even if the constraint due to workforce shortage has declined in comparison with October 2018, it remains however far higher than the long-term average (16%).

Employment prospects are less favourable

Fewer business managers than in October 2018 plan to increase their workforce over the next few months. The corresponding balance has fallen back after three consecutive quarters of increase, but remains however largely above its long-term average.

Public works economic outlook

Balances of opinion, in %, SA

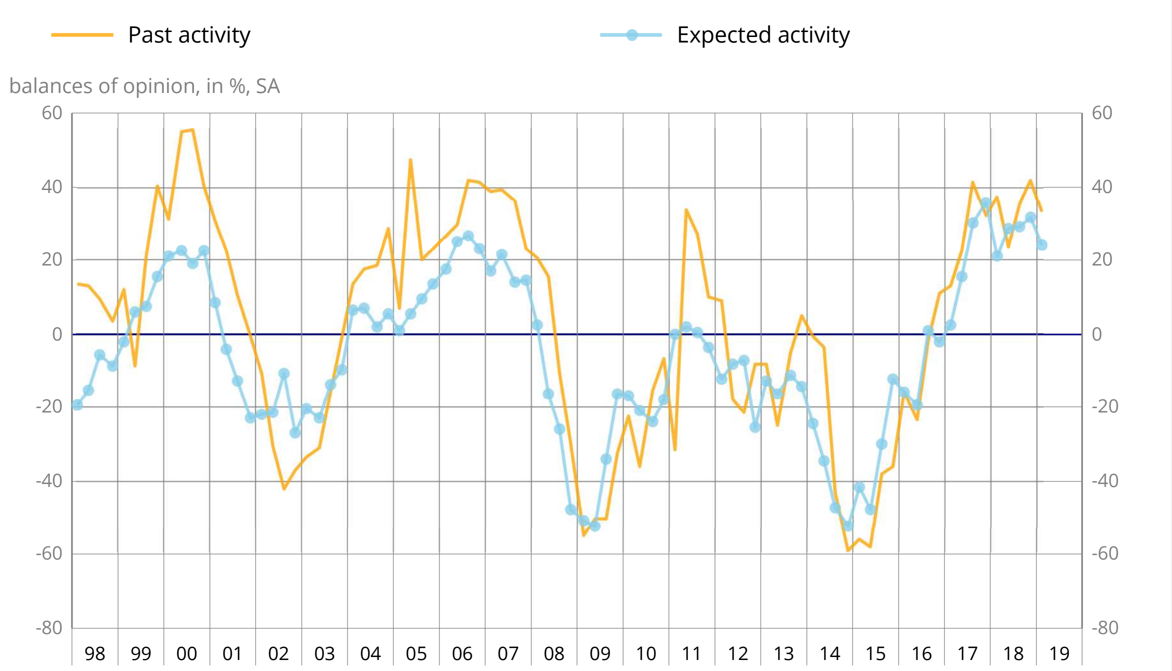
	Mean.*	April 18	July 18	Oct. 18	Jan. 19
Past activity	-5	23	35	42	33
- public-sector project	*-11*	*14*	*29*	*30*	*25*
- private-sector project	*-9*	*24*	*25*	*36*	*25*
Expected activity	-12	29	29	32	24
- public-sector project	*-16*	*22*	*23*	*23*	*18*
- private-sector project	*-15*	*24*	*22*	*22*	*18*
Opinion on order books	-25	10	19	19	24
Obstacles to production increase because of workforce shortage (in %)	16	38	51	49	36
Expected workforce	-14	31	33	37	24

Note: the balances of opinion by costumer 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

Sources : FNTP et Insee

Activity tendency in civil engineering



Sources: FNTP and INSEE.

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