BANK

HYPO GROUP ALPE ADRIA

UTJECAJ RECESIJE NA TRŽIŠTA RADA U JUGOISTOČNOJ EUROPI (primjer Hrvatske)

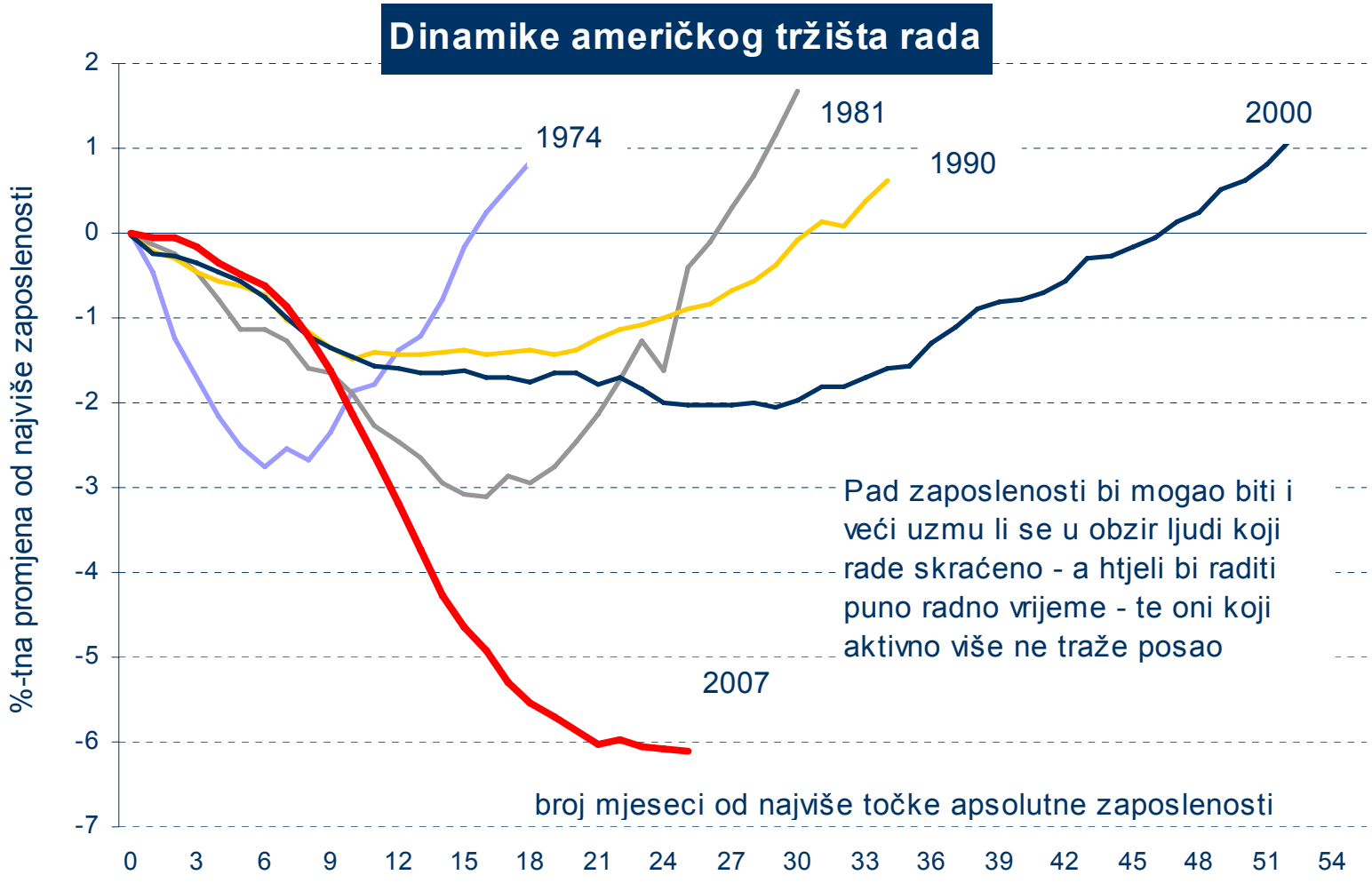
Sarajevo, 8.4.2010.

Hrvoje Stojić, Direktor Ekonomskih istraživanja

Sadržaj:

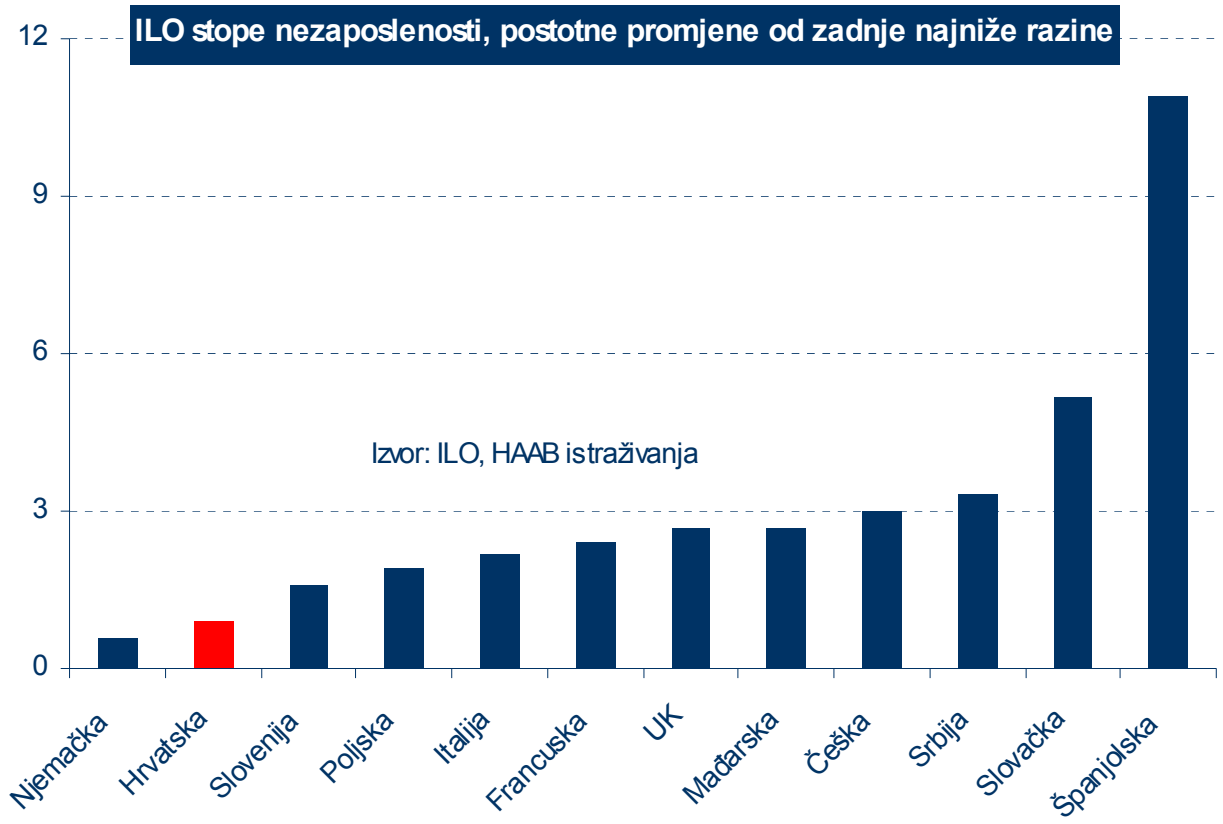
- Nezabilježena kontrakciaj tržišta rada
- Nezaposlensot u SEE regiji (primjer Hrvatske)
- Srednjoročni izgledi
- Razlozi niske participacije na tržištu rada
- Posljedice DUGOROČNE NEZAPOSLENOSTI
- Kako ju smanjiti?

NEZABILJEŽENA kontrakcija tržišta rada



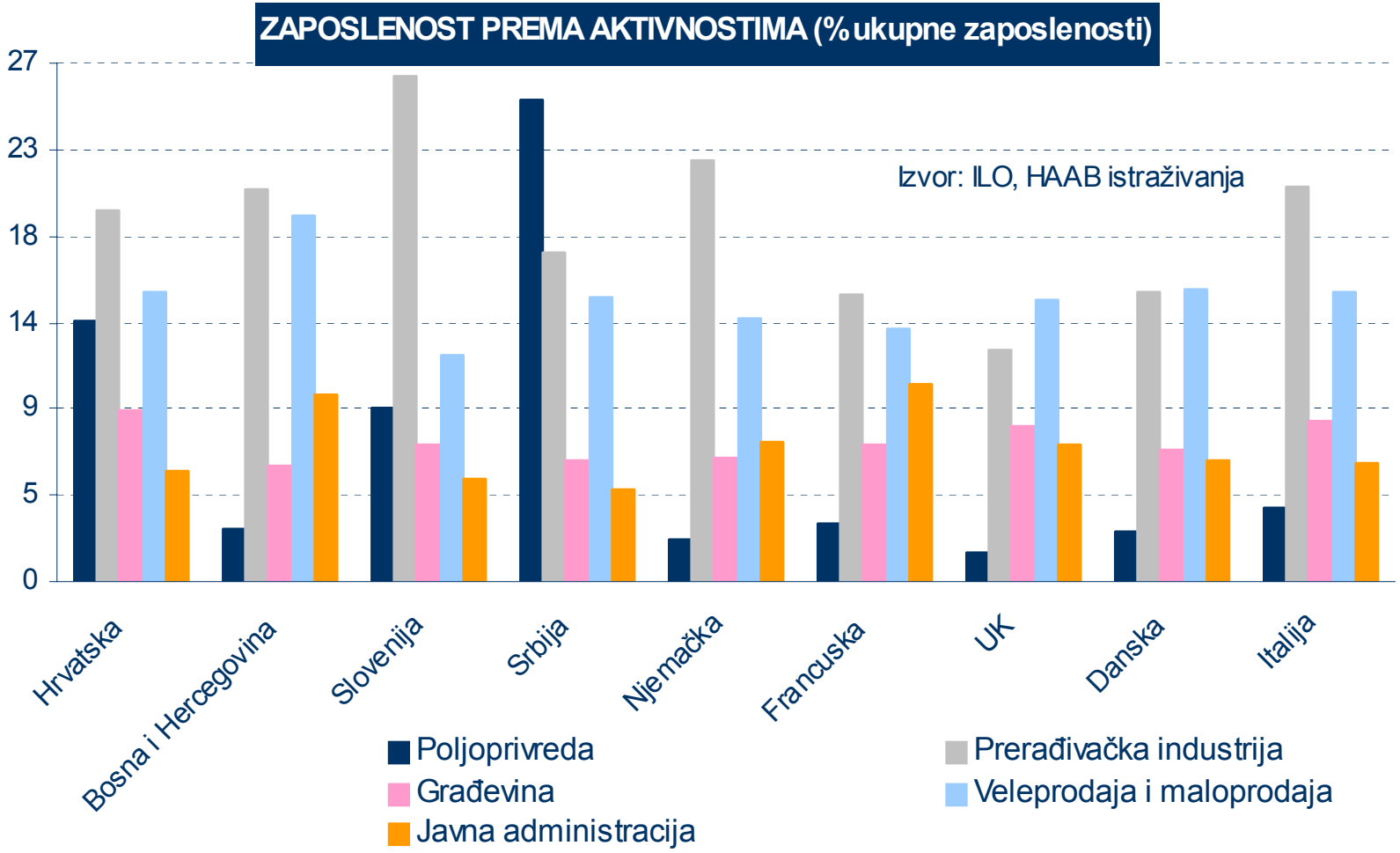
Izvor: Bloomberg, HAAB istraživanja

… u SEE regiji (za sada) blaža u odnosu na razvijene

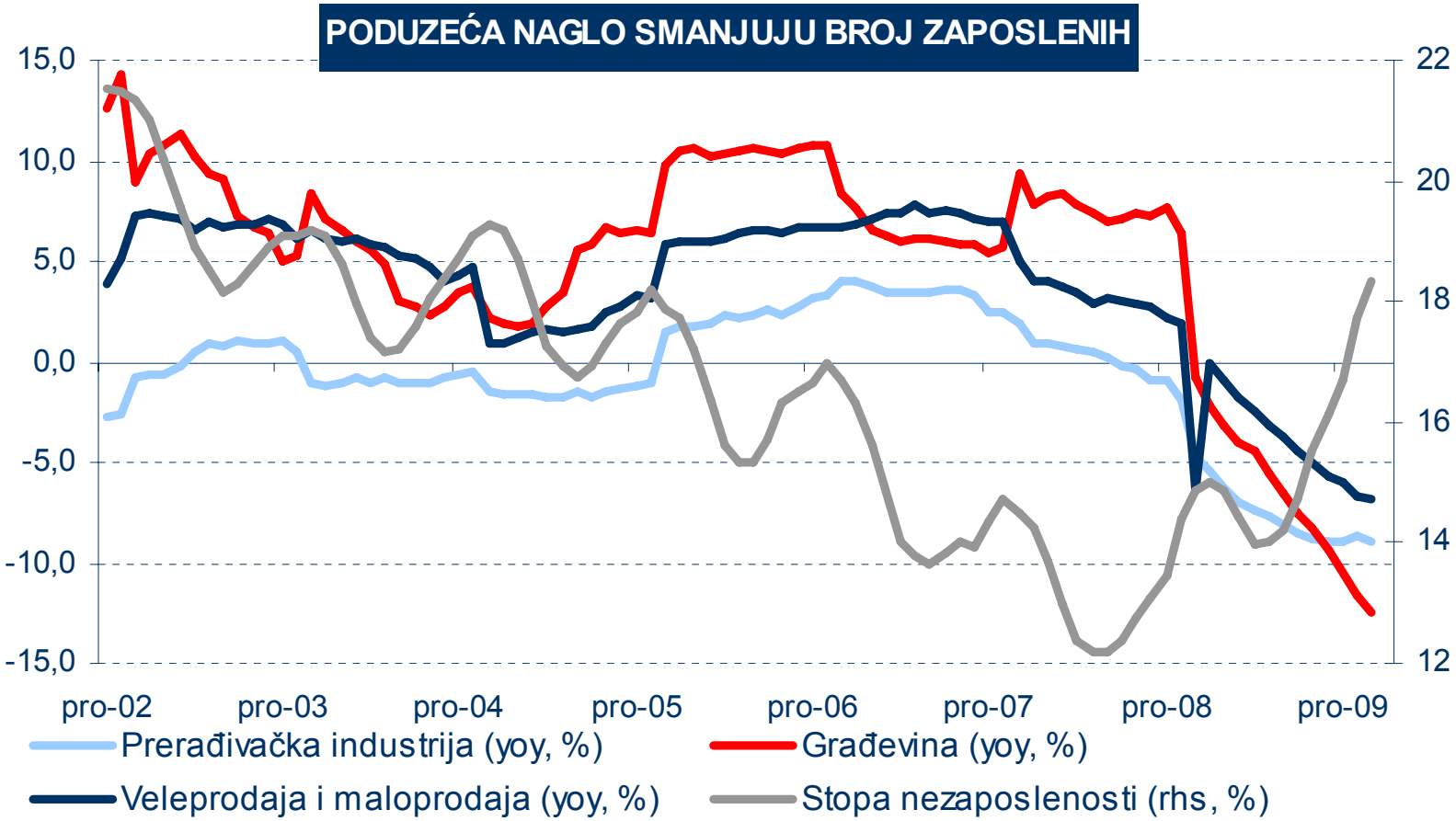


Stope nezaposlenosti poput njemačke nisu porasle značajno zahvaljujući državnom poticanju skraćenog radnog vremena. U nekim zemaljama poput Španjolske nezaposlenost je rasla znatno više nego što bi to pad BDP-a sugerirao (npr. španjolski BDP - 3,6% u 2009.

RIGIDNA ('DEFANZIVNA') STRUKTURA zaposlenosti…



Najviše stradali veliki sektori…



Izvor: DZS, HAAB istraživanja

Struktura (buduće) nezaposlenosti

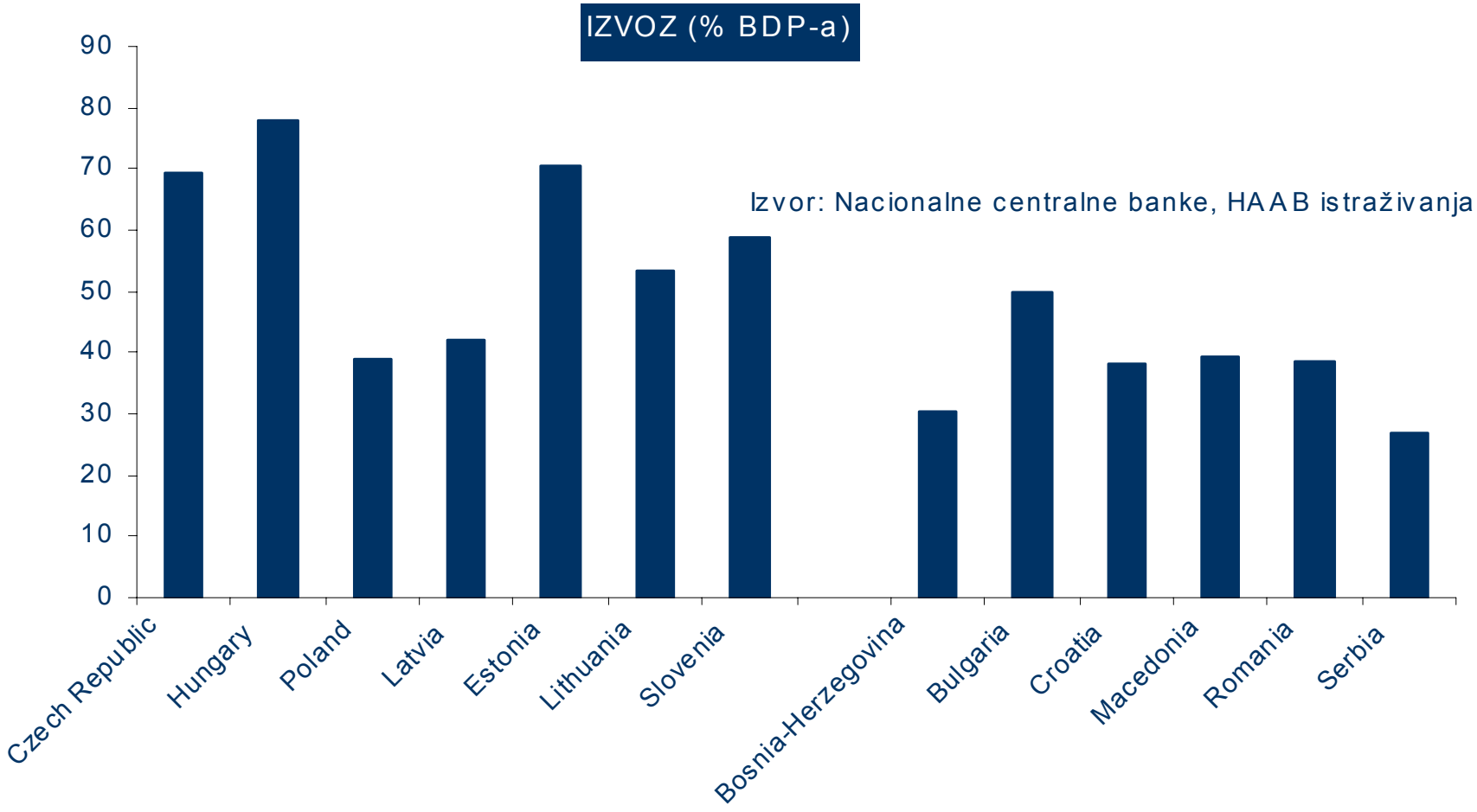
Omjer zaposlenih i nezaposlenih po djelatnostima

Ostale usluge	0,83
Ugostiteljstvo	1,17
Poljoprivreda	2,26
Građevinarstvo	2,95
Administrativne i pomoćne usluge	3,12
Prerađivačka industrija	3,56
Trgovina, popravak motornih vozila	3,62
Poslovanje nekretninama	4,24
Stručne, znanstvene i tehničke djelatnosti	6,1
Prijevoz i skladištenje	7,45
Umjetnost, zabava i rekreacija	8,01
Voda, otpad i sanacija okoliša	8,02
Rudarstvo i vađenje	8,25
Informacije i komunikacije	9,48
Financijske djelatnosti i osiguranje	11,85
Zdravstvena zaštita i socijalna skrb	16,65
Javna uprava i obrana, socijalno osiguranje	18,79
Obrazovanje	21,71

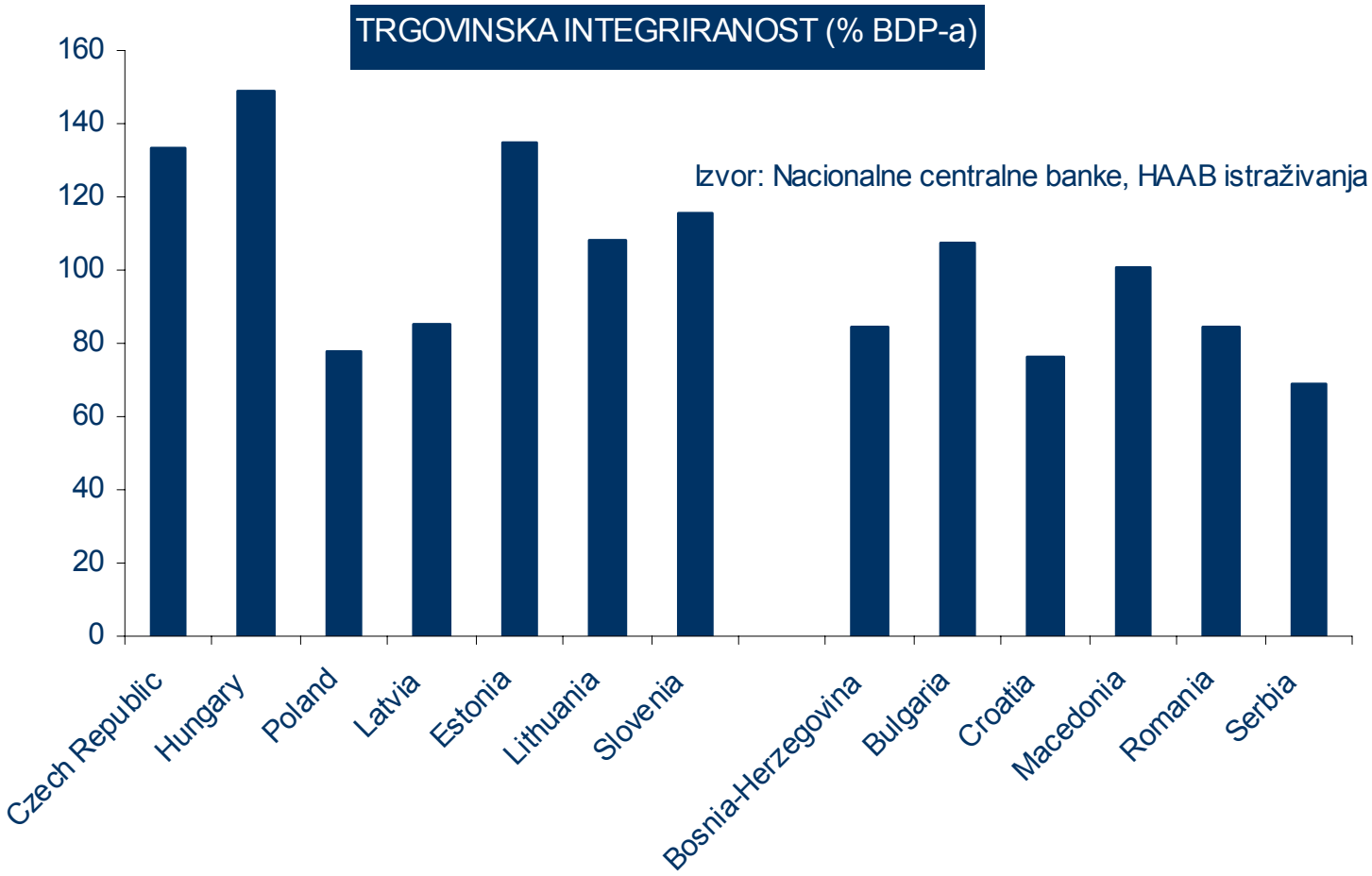
Izvor: DZS, Business.hr

manji omjer pokazatelj je dinamike/lakoće otpuštanja/smanjene potražnje u recesiji u pojedinim sektorima; visok omjer može upućivati i na nedostatak kvalitetne radne snage (ponude) u tim sektorima, ili pak na fenomen 'odljeva mozgova' u inozemstvo

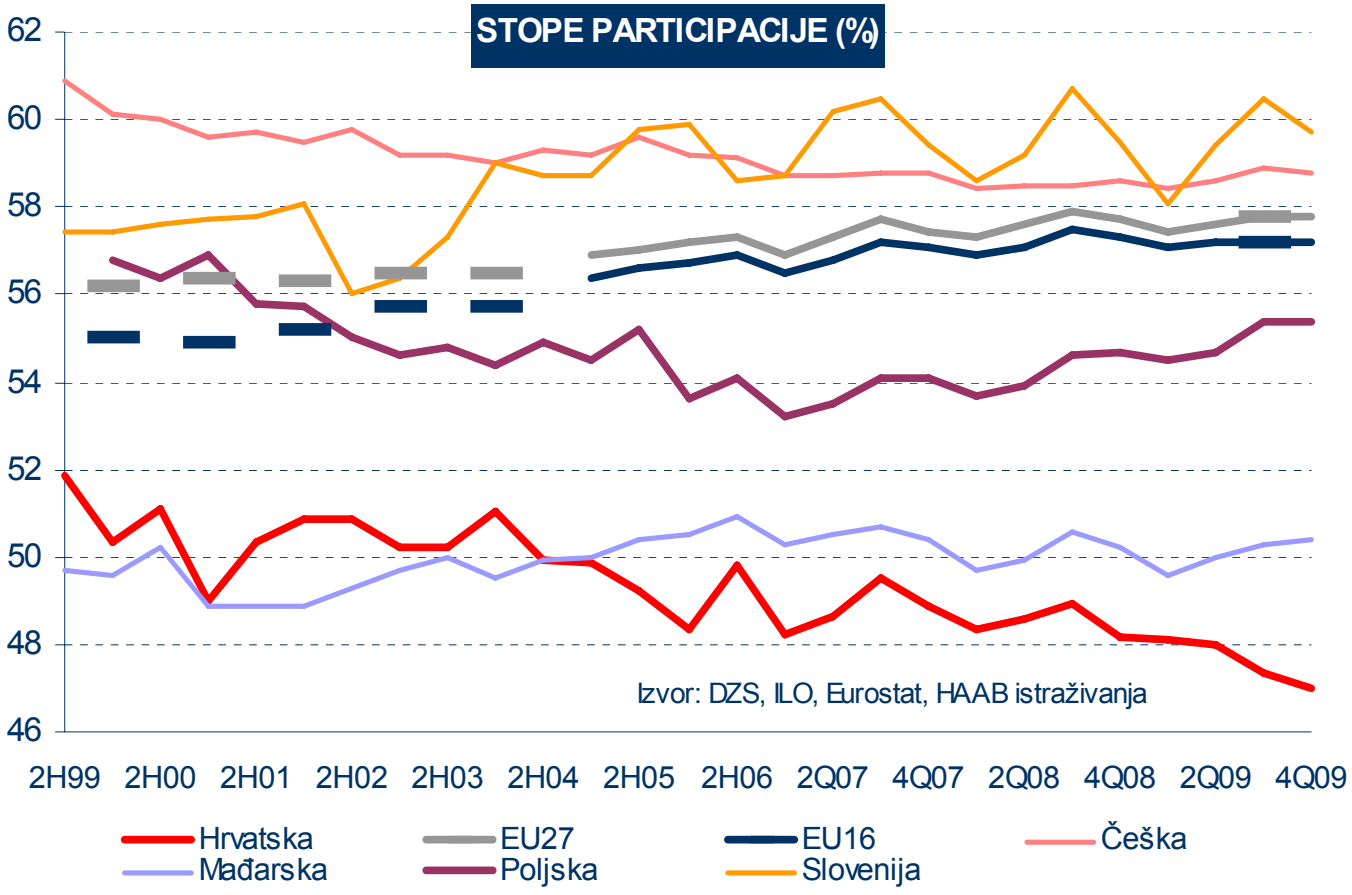
Relativno ZATVORENE EKONOMIJE (I)



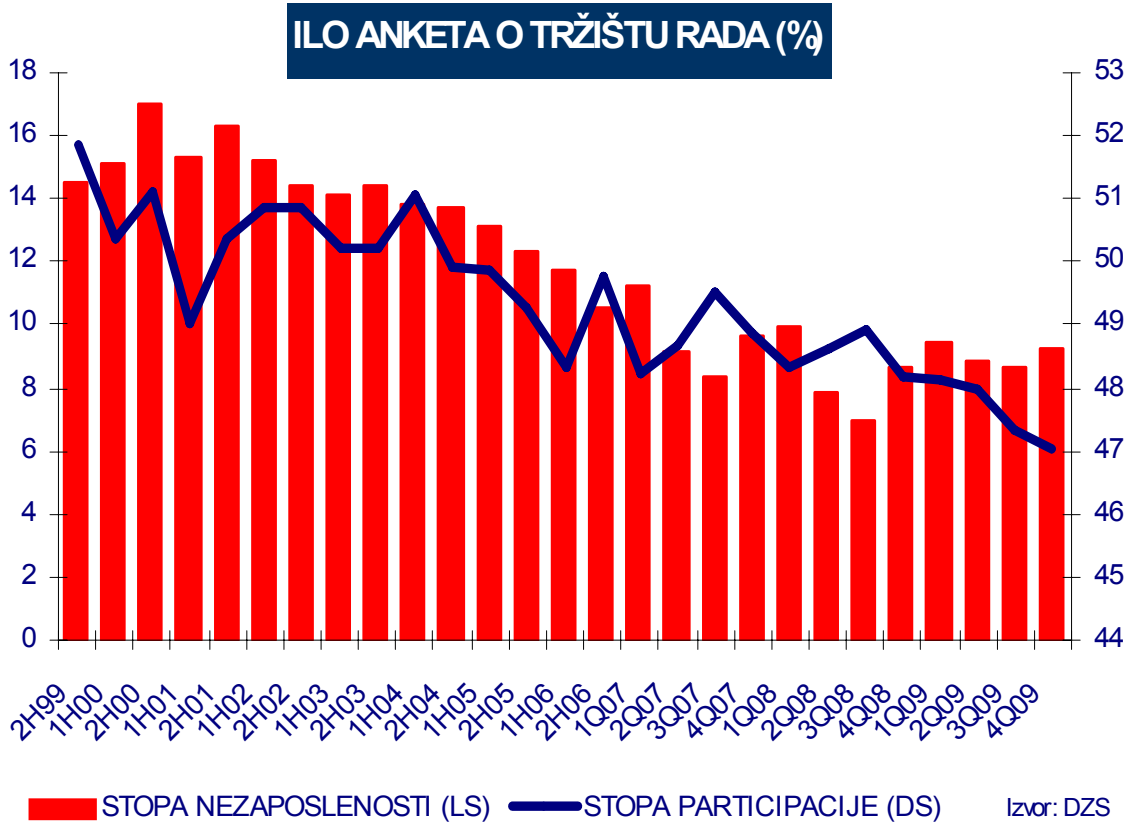
Relativno ZATVORENE EKONOMIJE (II)



… ali i dugoročno NISKA PARTICIPACIJA!



ONA JE TAKOĐER I PUNOVEĆI PROBLEM U ODNOSU NA STOPU NEZAPOSLENOSTI: I da odjednom zaposlimo svih 317.625 nezaposlenih, stopa zaposlenosti povećala bi se samo sa 57% na 59%, što je i dalje vrlo niska razina iskorištenosti radnoga potencijala zemlje (naspram 70-90% diljem današnje EU)

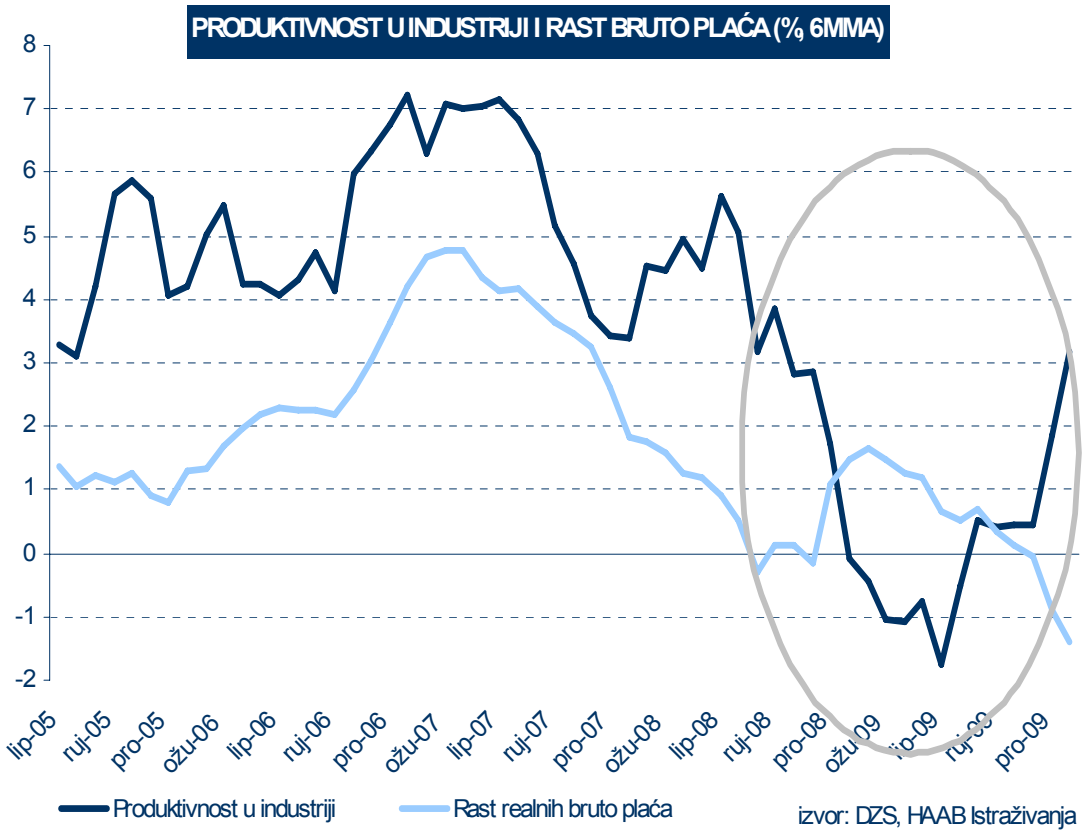


UZROCI NISKE RAZINE SUDJELOVANJA:

- Deindustrijalizacija 90-tih
- Umirovljenje u ranoj dobi (poraće, politika) radi kupovanja socijalnog mira
- Nedovoljno penaliziranje prijevremenog umirovljenja
- Povlaštene mirovine (u 2009. 2.5% BDP-a u Hrvatskoj) bez presedana
- Naknade za nezaposlenost potiču rad u neformalnoj ekonomiji
- Niska profesionalna te prostorna mobilnost radne snage

UZROCI VISOKE NEZAPOSLENOSTI:

- Plaće u Hrvatskoj su visoke u odnosu na produktivnost (gledano regionalno)
- Druge krutosti tržišta rada (visoki troškovi zapošljavanja/otpuštanja)
- Dugoročni problem nepodudarnosti kvalifikacija (obrazovni sustav!)

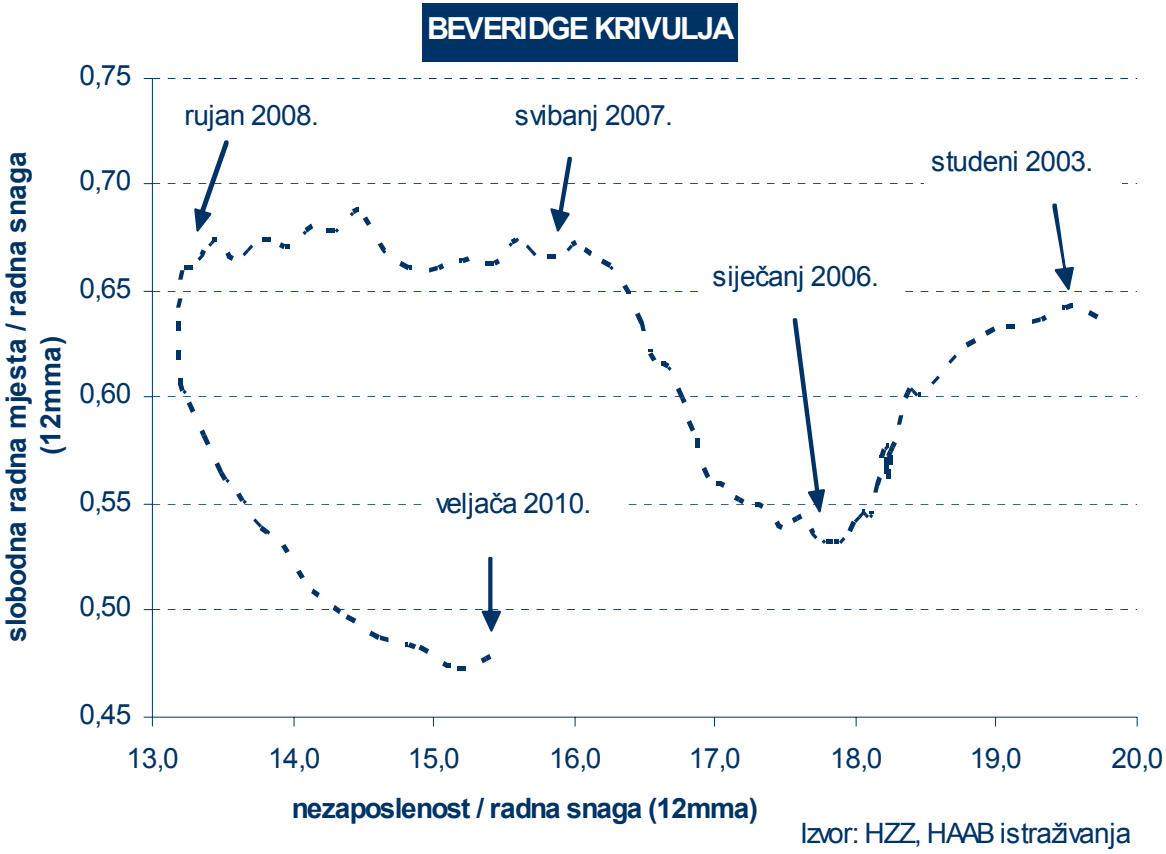


- Kratkoročno, pad produktivnosti prethodio padu realnih bruto plaća

- AKTUALNA ZABLUDA: Dok god produktivnost raste brže od relanih plaća, postojat će pritisak na usklađivanje potonjih naviše na već relativno visokim razinama

S obzirom na opredjeljenje za stabilan tečaj, neadekvatnu fiskalnu prilagodbu te limite monetarne politike, prije slijedi daljnja prilagodba gospodarstva na strani domaće potražnje uz cijenu visoke nezaposlenosti te devalvaciju cijene rada

Daljnji rast nezaposlenosti do 11-12%



Izvor: HZZ, HAAB istraživanja

Nakon što je rast ponude radnih mjesta tijekom 2006.-2007. implicirao ubrzanje ekonomskog rasta, pad slobodnih radnih mjesta potom sugerira snažan pad aktivnosti. Prema teoriji Beveridge krivulje, očekuje nas **daljnji rast nezaposlenosti do 20%+ (11-12% ILO).**

RAZDUŽIVANJE / restrukturiranje poduzeća također odgađa početak rasta novozaposlenih

Posljedice dugotrajne nezaposlenosti

- vodi ka socijalnoj isključenosti, političkoj i ekonomskoj nestabilnosti te trajnog gubitka radnih potencijala → raste stopa siromaštva!

- najlošije prođu oni koji prvi put traže posao i slabije obrazovani

- izraženije nejednakosti u obrazovanju

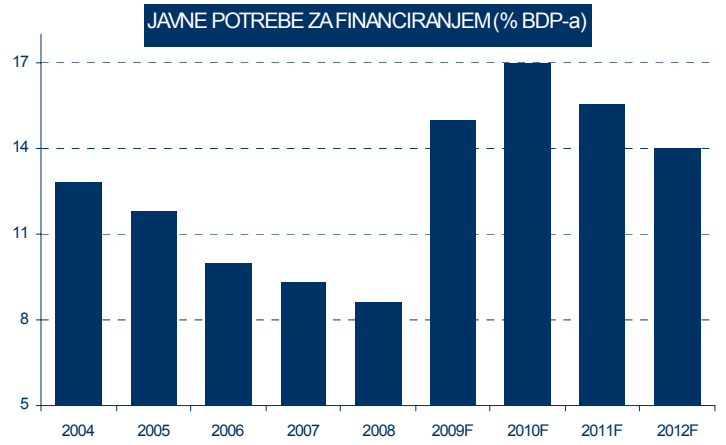
- neravnomjerni regionalni razvoj

- kriminal, obiteljsko nasilje

<u>FINANCIJSKI GLEDANO:</u>

- pritisak na mirovinski sustav (već ostvaruje 30% javnih rashoda te stavra 5 p.b. BDP-a deficita)

- Porast zdravstvenih troškova (oko 9% BDP-a već među najvišim u regiji)



Izvor: Ministarstvo financija, HAAB istraživanja

Kako se ona može smanjiti?

Poboljšanje ulagačke klime?
Privlačenjem investicija?
Kako?

- INVESTICIJE U LJUDSKI KAPITAL: reforma školstva, jačanje sustava cjeloživotnog učenja → značajan porast visokoobrazovanih u strukturi radne snage, spremnije na prilagodbu novim djelatnostima

- reforma socijalnih transfera, odmak od kupnje glasova ka ciljanoj socijalnoj pomoći

- porezna reforma (niži porezi na rad; oporezivanje imovine, kapitala, trošarine)

- poticanje mobilnosti, aktivnog umirovljenja

- završetak restrukturiranja → rast produktivnosti → jačanje trgovinske integracije

- dugoročno mijenjati strukturu ekonomije (uklj. smanjenje ovisnosti o turizmu)

Disclosures Appendix

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