



Podpora ekonomické diplomacie

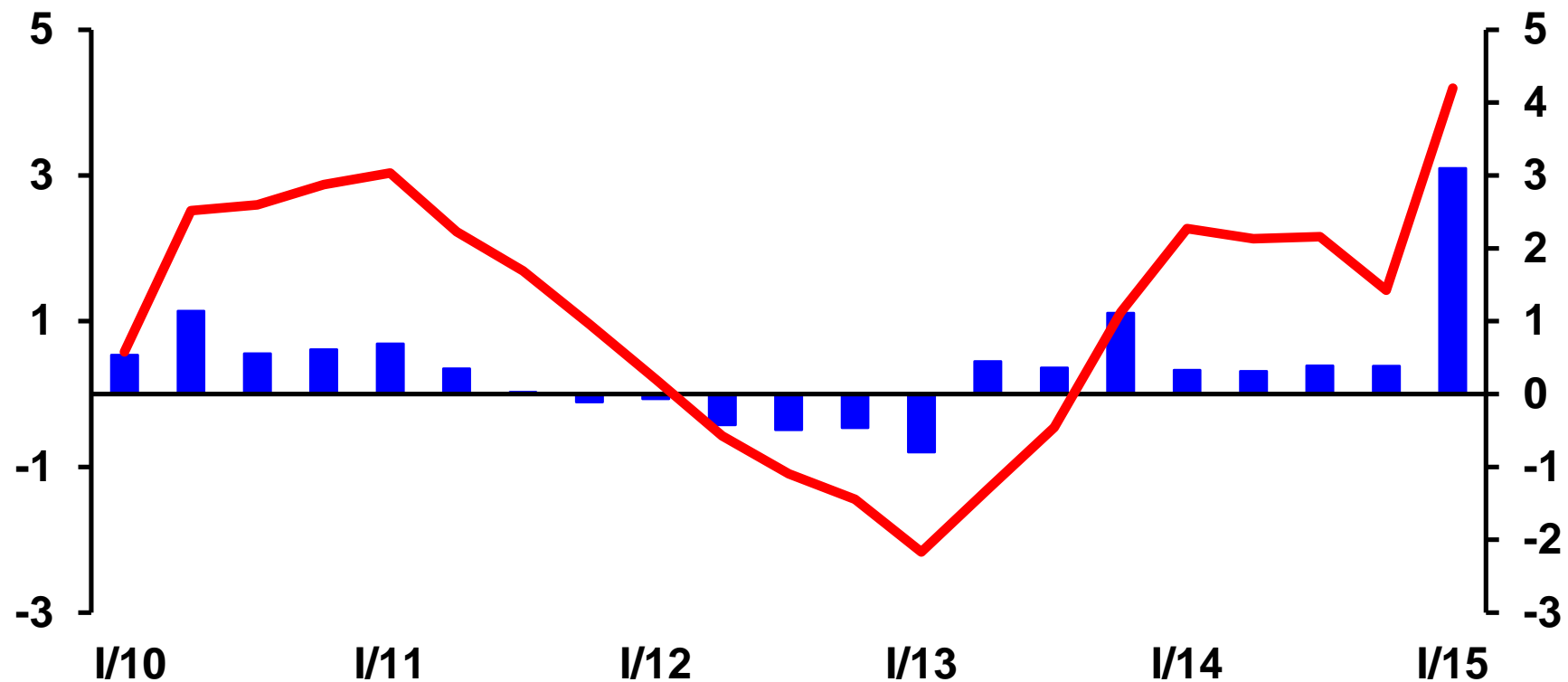
Vladimír Dlouhý, prezident, Hospodářská komora ČR

Konference ekonomických radů
Praha, 22. června 2015





GDP, 2010 – 2015, seasonally adjusted

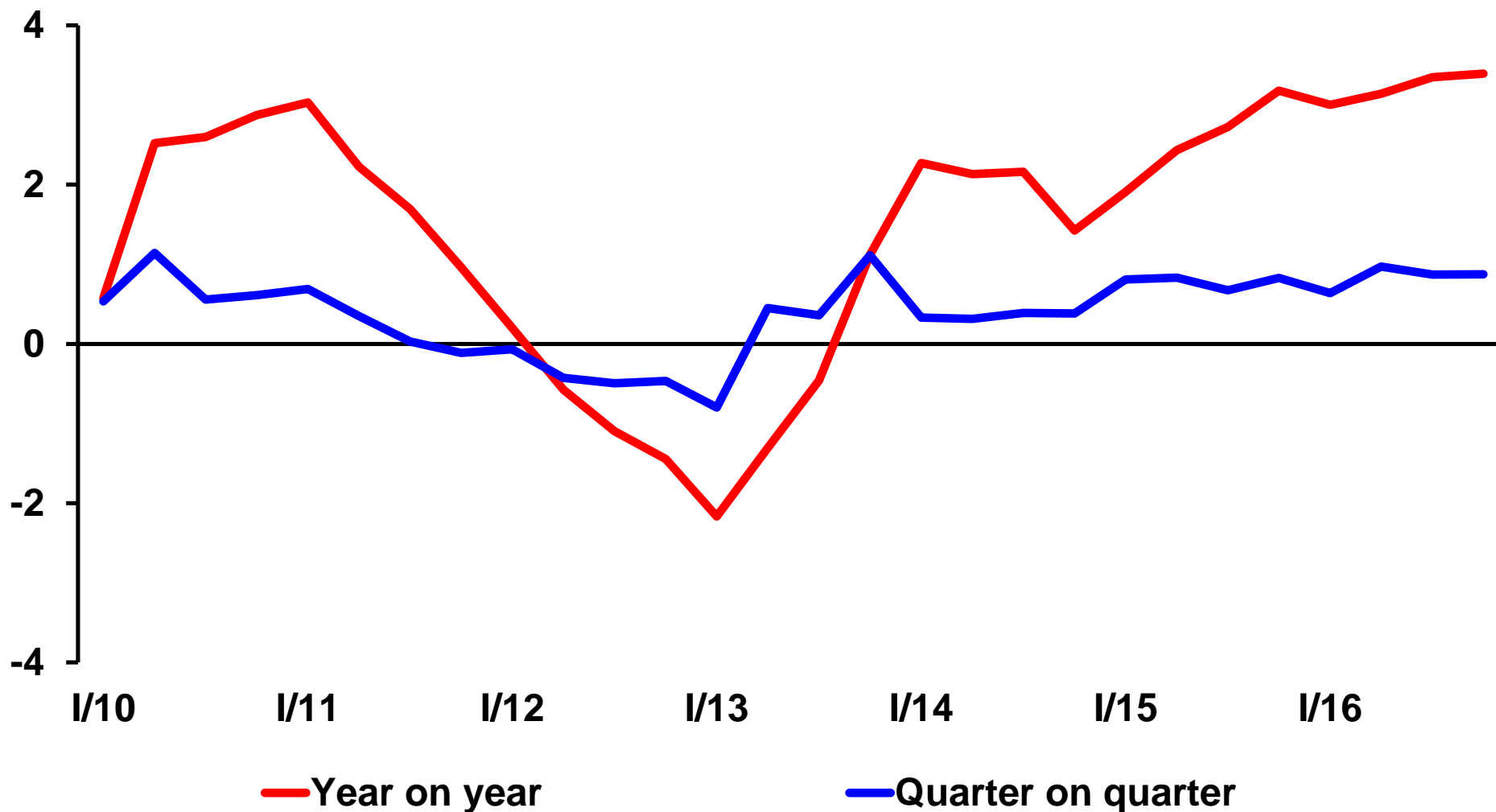


■ q-o-q GDP growth (right-hand scale) — y-o-y GDP growth





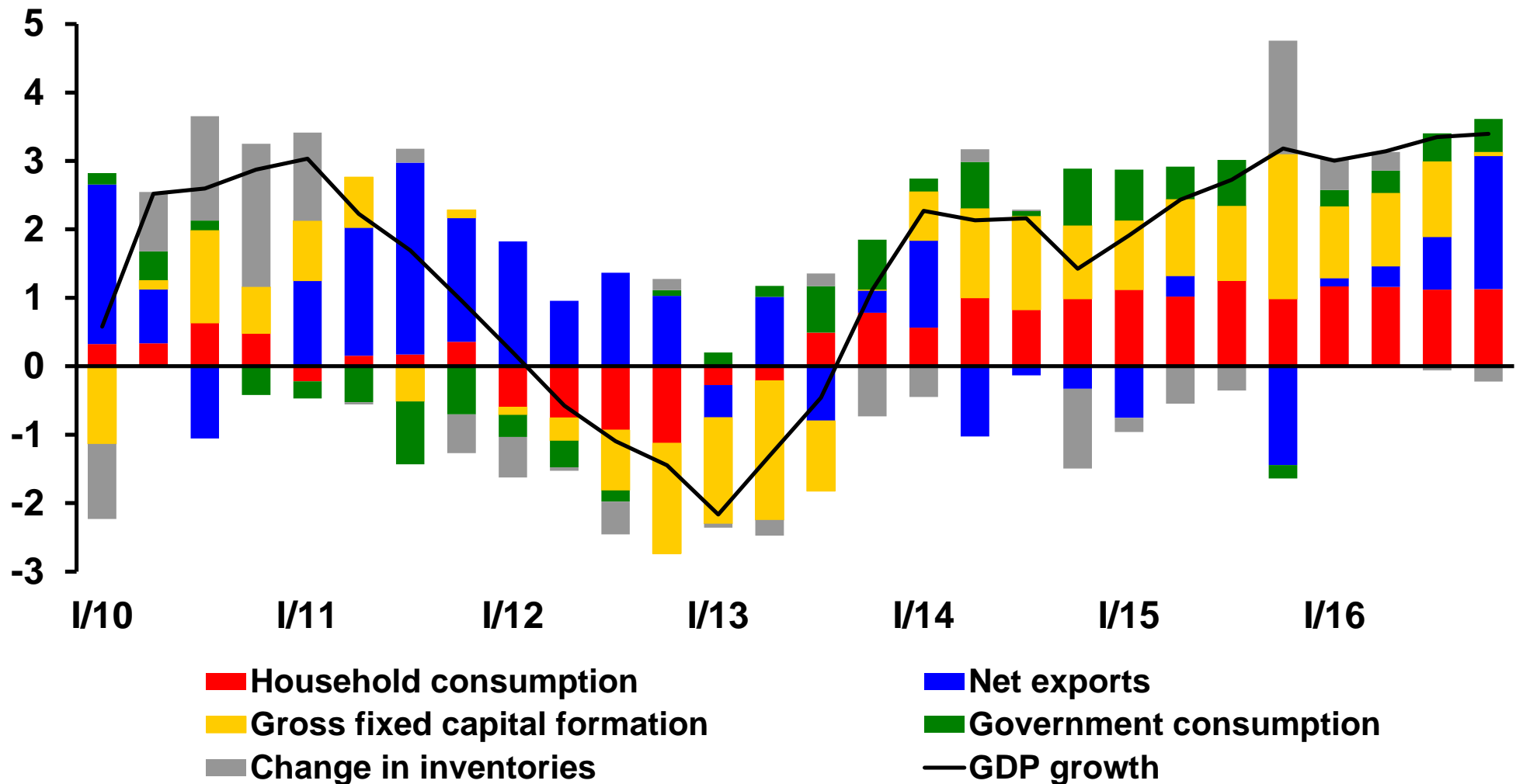
GDP, 2010 – 2016, seasonally adjusted





Annual GDP growth structure

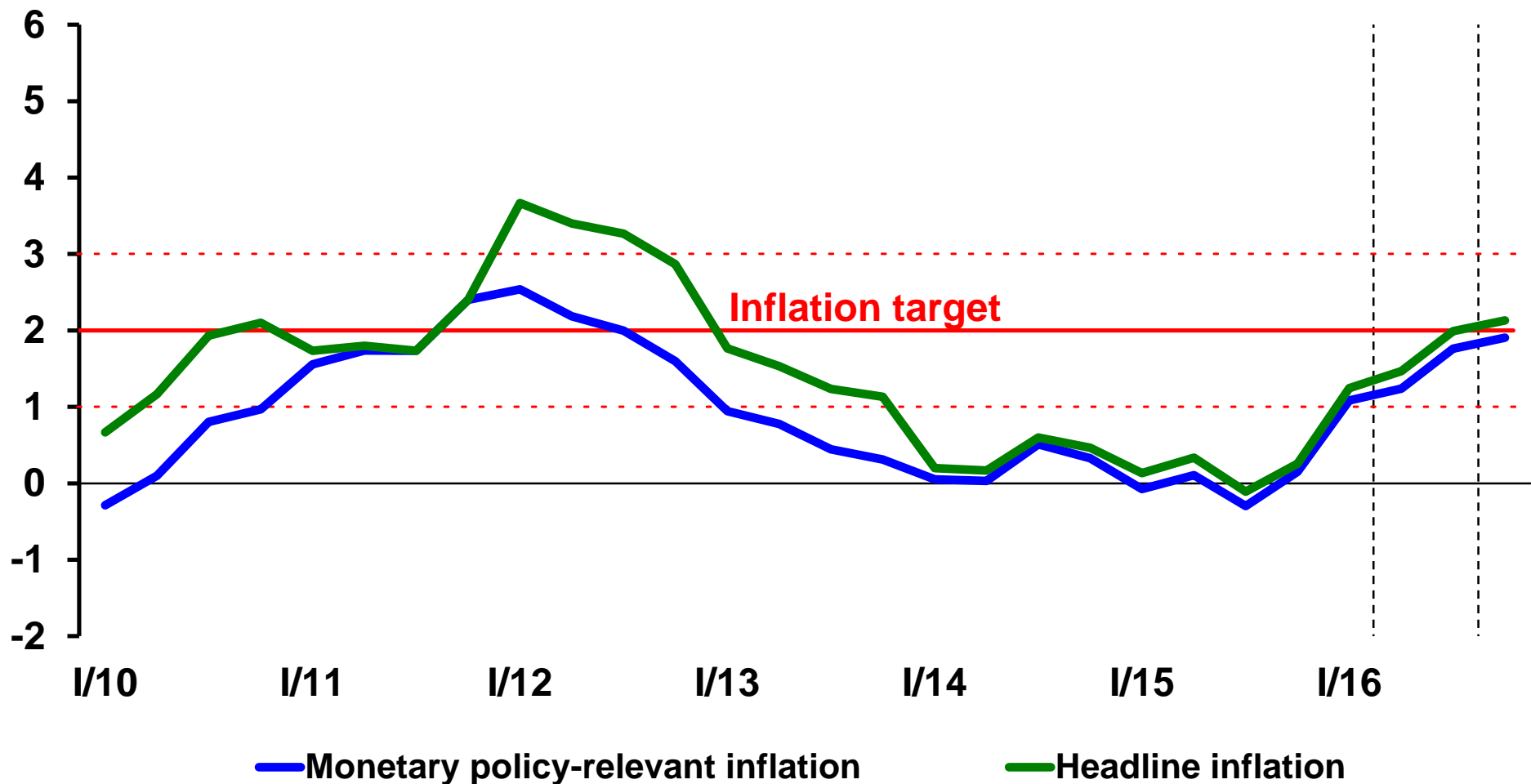
annual % changes, contribution in % point, seasonally adjusted





Inflation: headline and monetary policy relevant

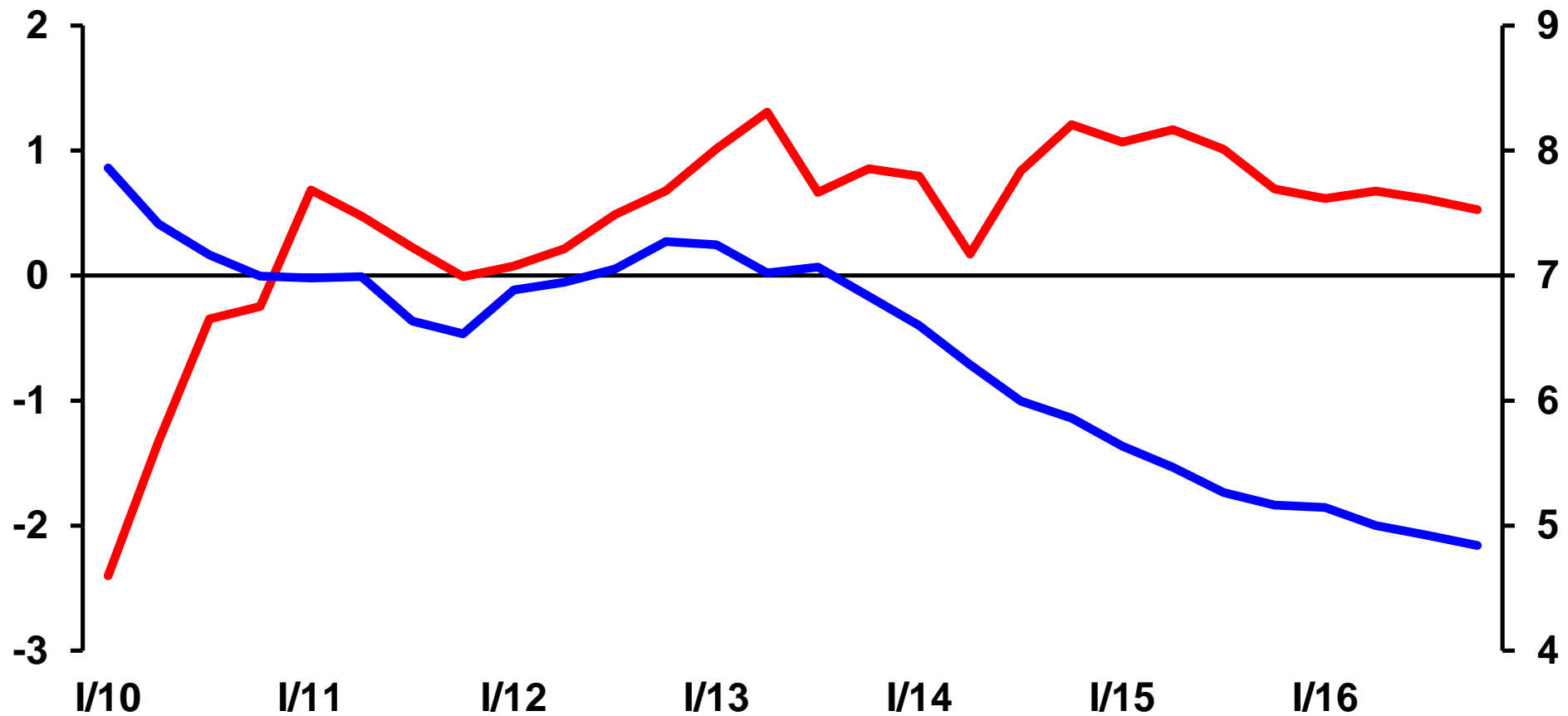
yoy in %





Labor market forecast

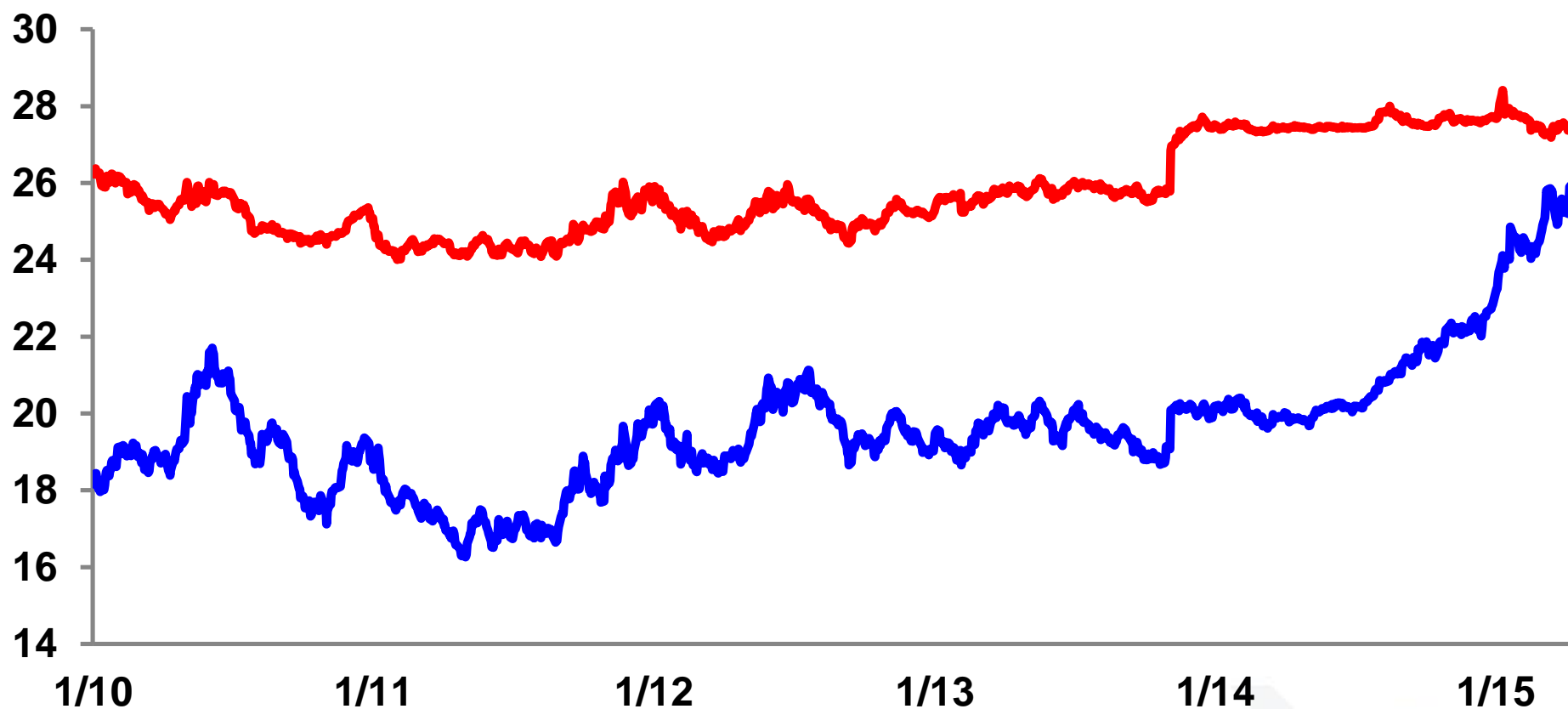
annual changes in %, seasonally adjusted



— Employment — General unemployment rate (right-hand scale)



CZK/EUR and CZK/USD exchange rates





Forecast of selected variables

	2014	2015	2016
	actual	forec.	forec.
Real gross disposable income of households	2.1	2.8	2.0
Total employment	0.8	1.0	0.6
Unemployment rate (in per cent)^{a)}	6.2	5.4	5.0
Labour productivity	1.6	1.5	2.6
Average nominal wage	2.4	2.5	3.9
Average nominal wage in business sector	2.4	2.3	4.2
Current account balance (ratio to GDP in per cent)	0.6	1.1	1.5
M2	4.2	5.6	6.3

a) ILO methodology, 15–64 years



Fiscal forecast

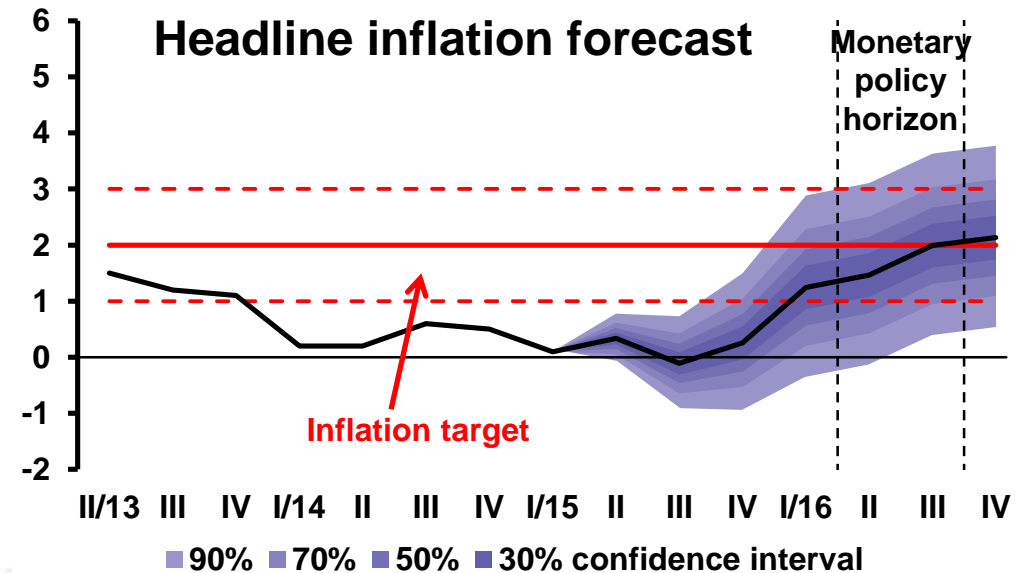
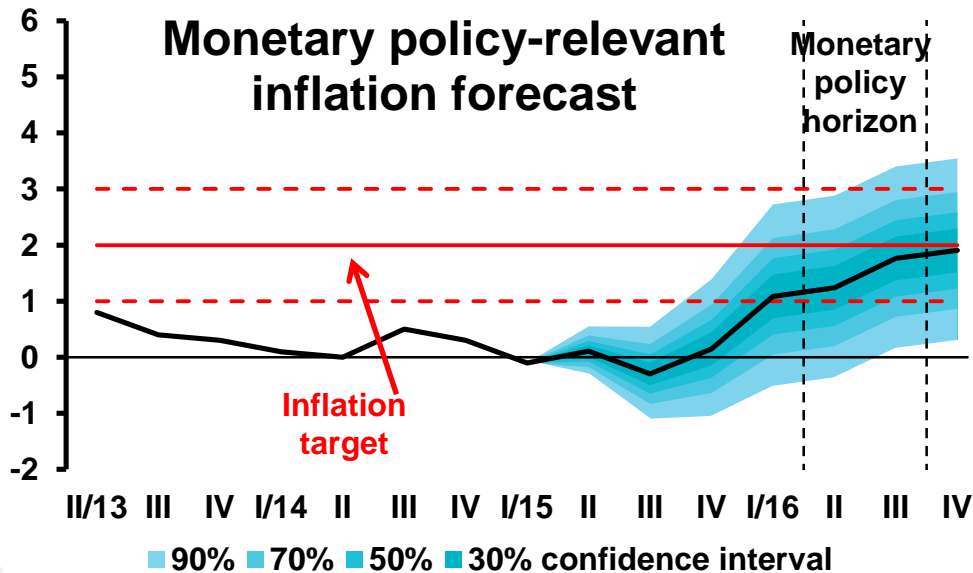
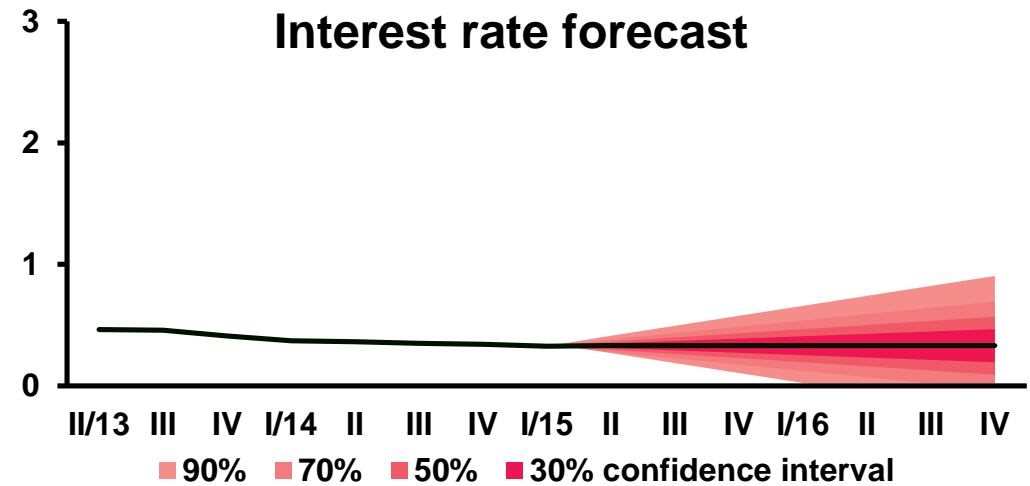
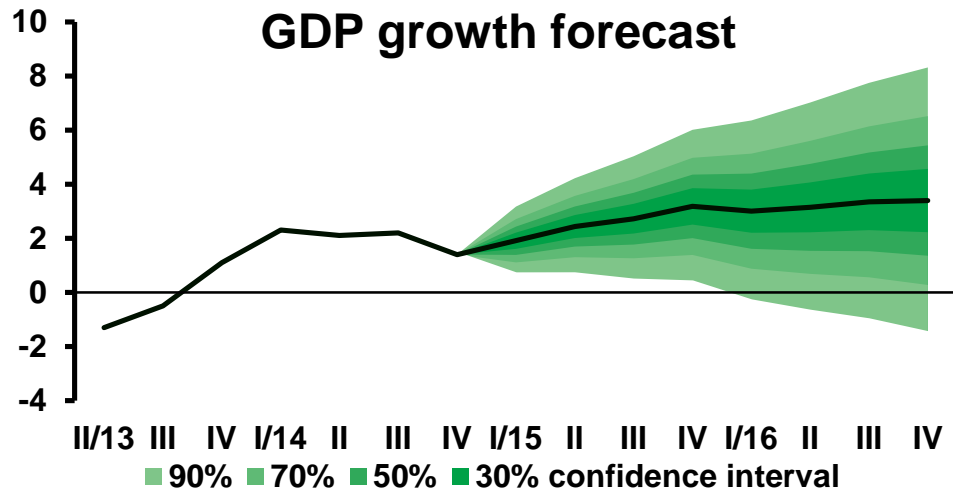
	2014	2015	2016
	actual	forecast	forecast
Government revenue	40.1	40.6	39.9
Government expenditure	42.0	42.2	40.9
of which: interest payments	1.3	1.2	1.2
GOVERNMENT BUDGET BALANCE	-2.0	-1.6	-1.0
of which:			
primary balance ^{a)}	-0.7	-0.4	0.2
one-off measures ^{b)}	-0.6	-0.2	0.1
ADJUSTED BUDGET BALANCE^{c)}	-1.4	-1.4	-1.1
Cyclical component (ESCB method)^{d)}	-0.5	-0.1	0.3
Structural balance (ESCB method)^{d)}	-0.9	-1.4	-1.4
Fiscal stance in pp (ESCB method)^{e)}	-0.9	-0.5	0.0
Cyclical component (EC method)^{d)}	-0.9	-0.7	-0.2
Structural balance (EC method)^{d)}	-0.5	-0.8	-0.9
Fiscal stance in pp (EC method)^{e)}	-0.4	-0.3	-0.1
Government debt	42.6	40.6	40.0



BoP forecast

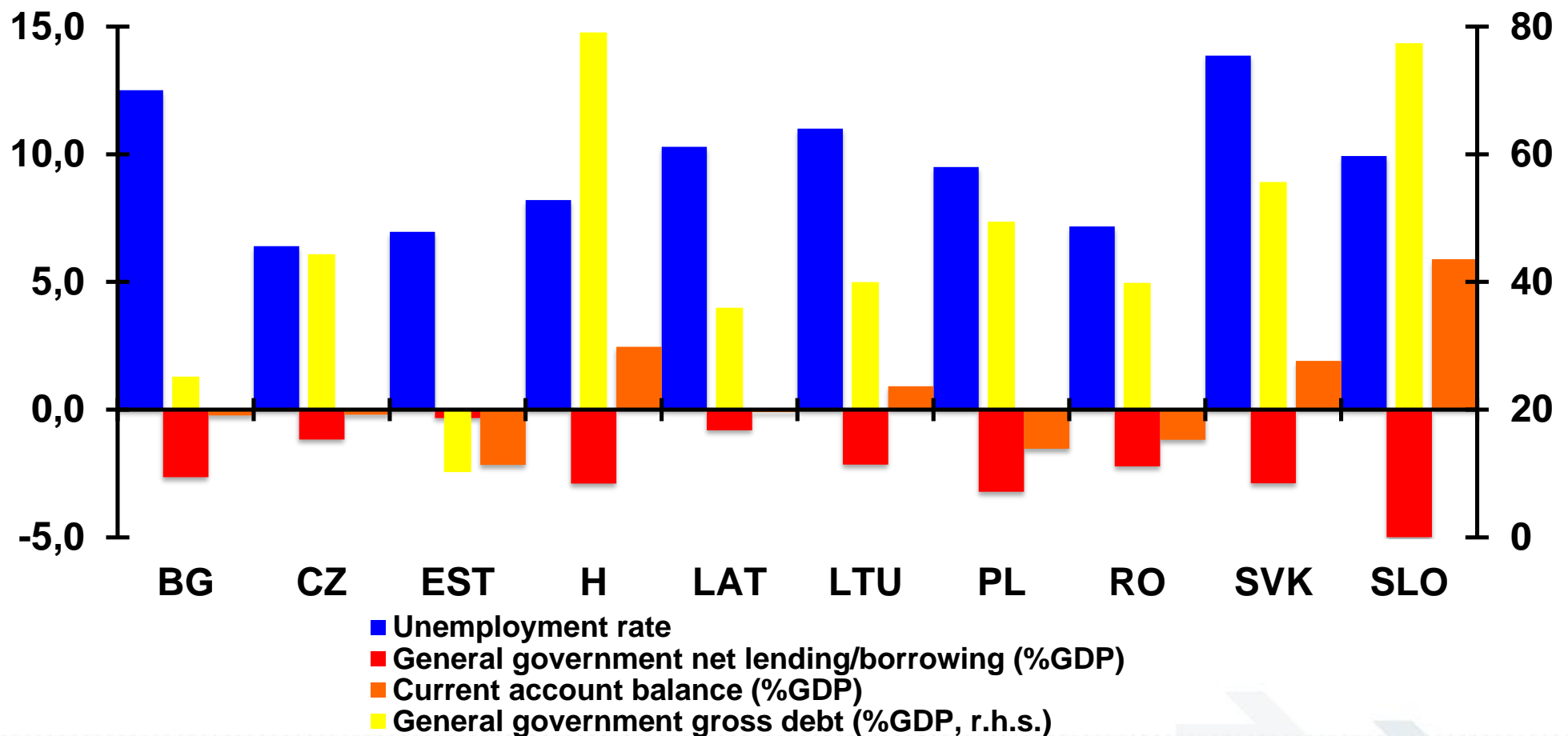
	2014	2015	2016
	actual	forec.	forec.
A. CURRENT ACCOUNT	26.1	50.0	70.0
Goods	238.9	280.0	320.0
Services	55.9	45.0	50.0
Primary income	-259.0	-275.0	-300.0
Secondary income	-9.7	0.0	0.0
B. CAPITAL ACCOUNT	32.2	60.0	60.0
C. FINANCIAL ACCOUNT^{a)}	48.0	202.0	127.0
Direct investment	-133.6	-30.0	-75.0
Portfolio investment	90.3	50.0	40.0
Financial derivatives	-6.0		
Other investment	24.2	50.0	30.0
Reserve assets	73.1	132.0	132.0

^{a)} forecast excluding operations of banking sector
and financial derivatives but including changes in CNB reserves



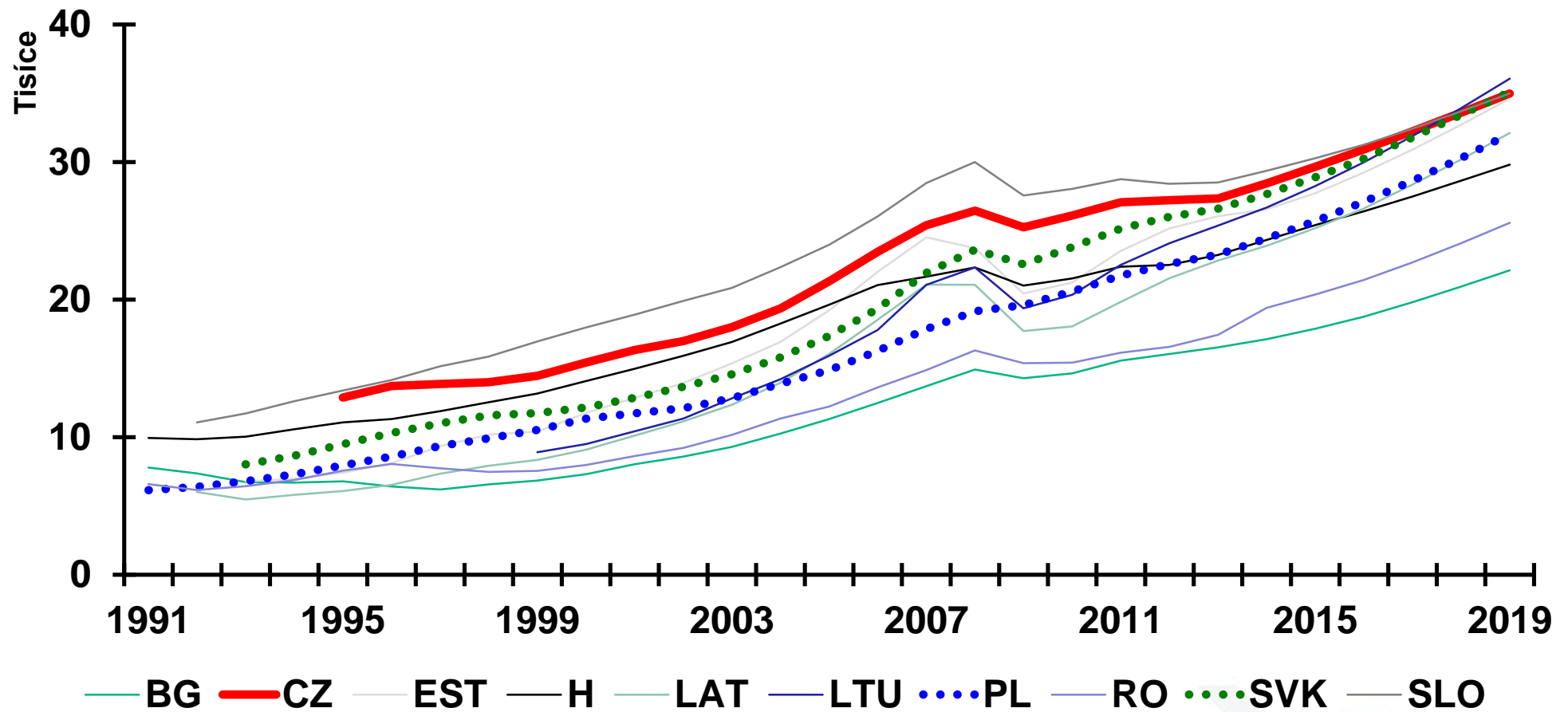


CEE: unemployment, public finance



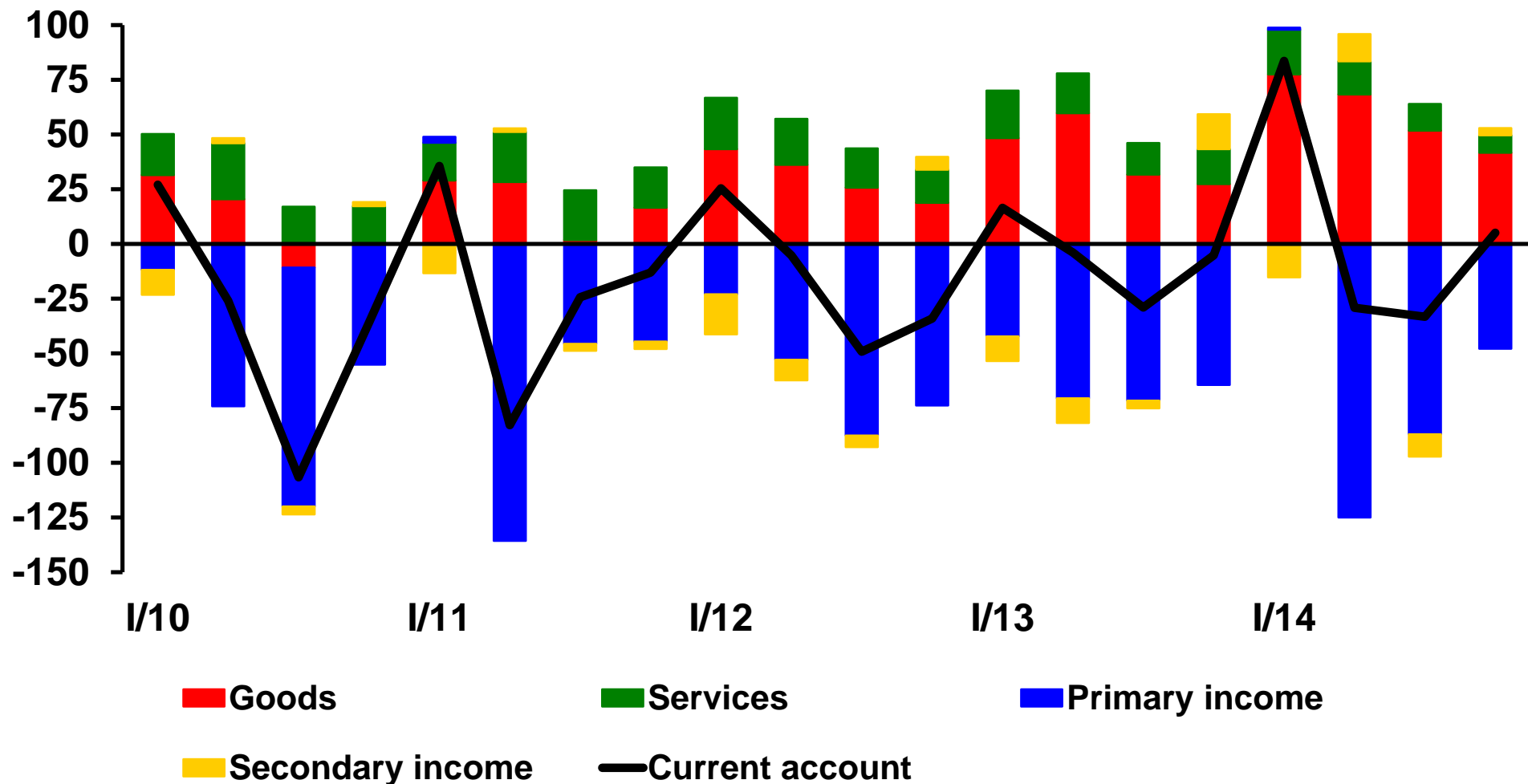


GDP per capita, 1991-2019, in PPP



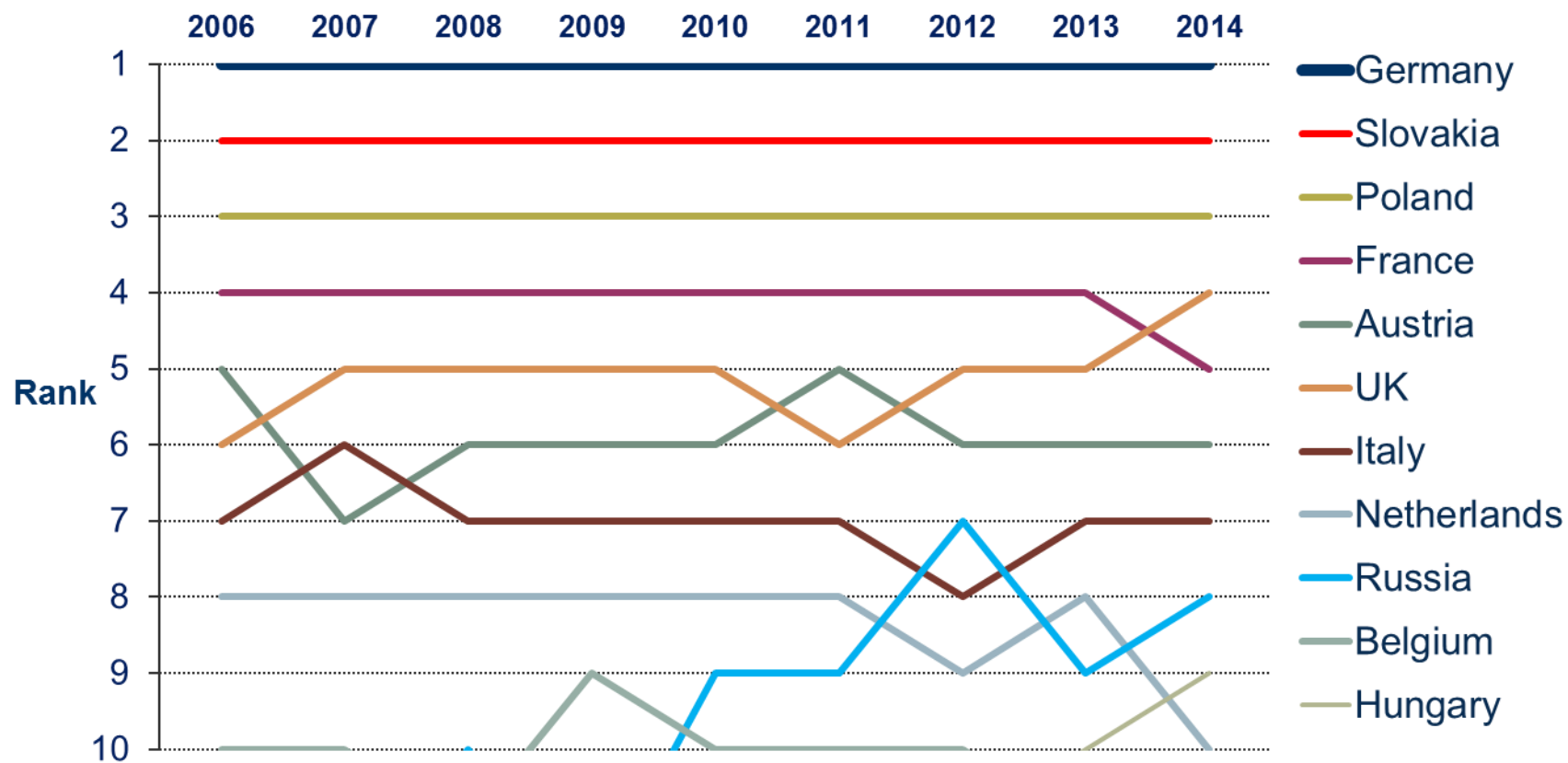


Current account, CZK bill.





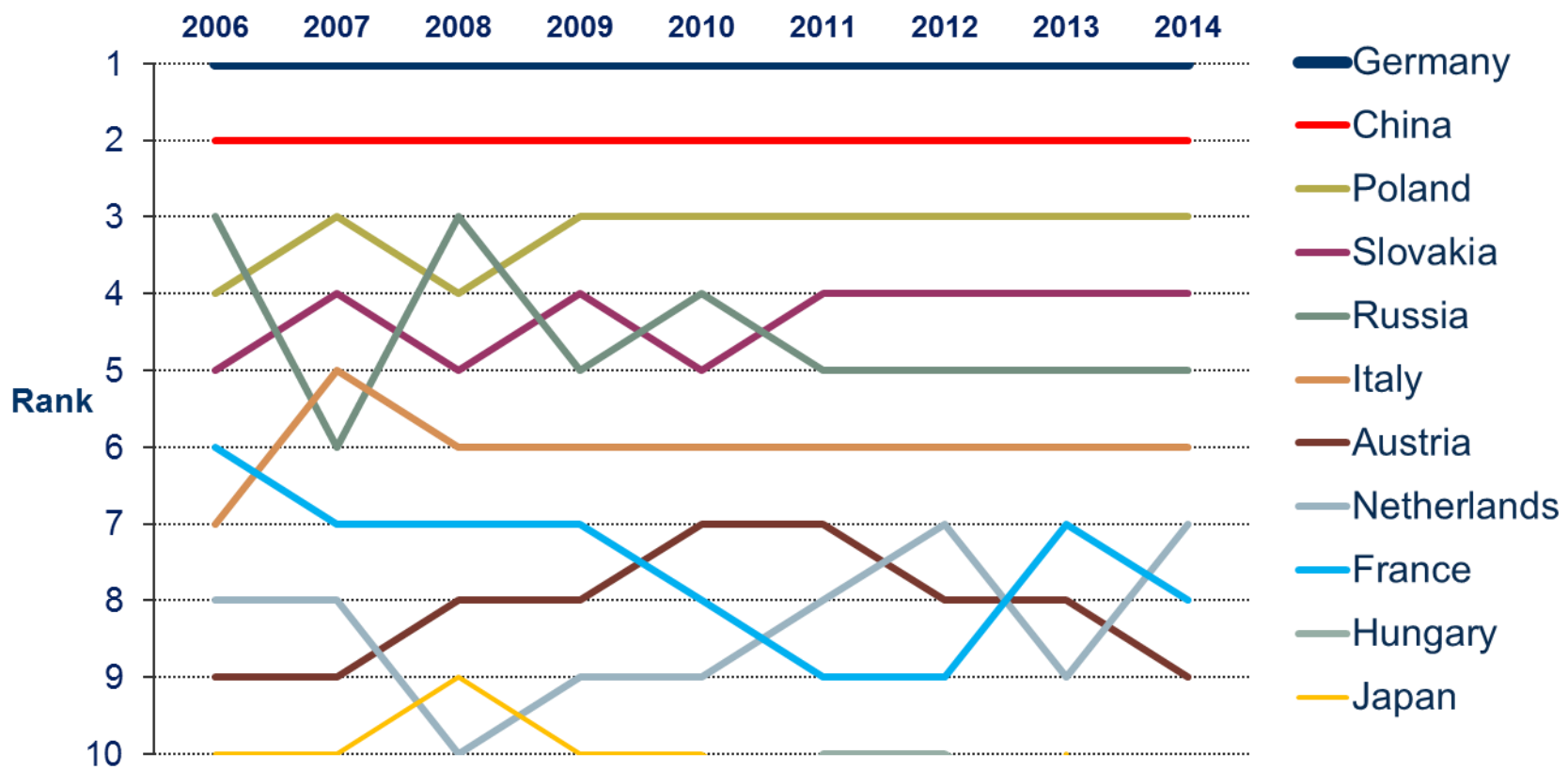
Exports 2006 - 2014



Source: Czech Statistical Office, 2015



Imports 2006 - 2014



Source: Czech Statistical Office, 2015



Foreign Trade and Investment – Top 10

Foreign Trade according to turnover (1999-2014)

Country	Share in total foreign trade (%)
Germany	30,4
Slovakia	7,1
Poland	5,9
China (Peoples Republic of)	4,6
France	4,5
Austria	4,3
Italy	4,3
Russian Federation	3,9
United Kingdom	3,7
Netherlands	3,3

Foreign Direct Investment Inflow (1993-2013)

Country	Share in total FDI inflow (%)
Germany	22.0
Netherlands	17.0
Austria	13.3
France	5.7
United States	5.5
Switzerland	4.6
Belgium	4.7
United Kingdom	2.0
Sweden	1.6
Italy	0.8



Exportní strategie 2012 - 2015

- **Růst celkového vývozu 2014/2013: +13,5%**
 - **Prioritní země +2.8%, zájmové země +4.8%**
- **Podpora státu dále potřebná, diverzifikace, orientace na mimoevropské trhy**
- **Exportní podpora malých a středních firem**
 - **jazyková bariéra, zahraničně-obchodní praxe**
- **Spolupráce s ekonomickými diplomaty**



Aktivity HK ČR

- **Podnikatelské mise, efektivita**
 - **Nástroj pro nalezení zahraničních partnerů, především kontakty mimo evropské země**
 - **předvýjezdní setkání**
- **Následné vyhodnocení misí, zásadní**
- **Teritoriálně zaměřené kulaté stoly**
- **Semináře o exportu**
- **Úzká spolupráce s MPO a MZV ČR, poděkování**



Kudy dál?

- **Nezastupitelná role státu**
- **Nabídka využití naší komorové sítě**
 - **existuje 22 let, k dispozici 300 lidí**
- **Průběžné zjišťování aktuálních potřeb českých exportérů**
- **Exportní semináře, efektivnější příprava misí**





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Děkuji za pozornost

