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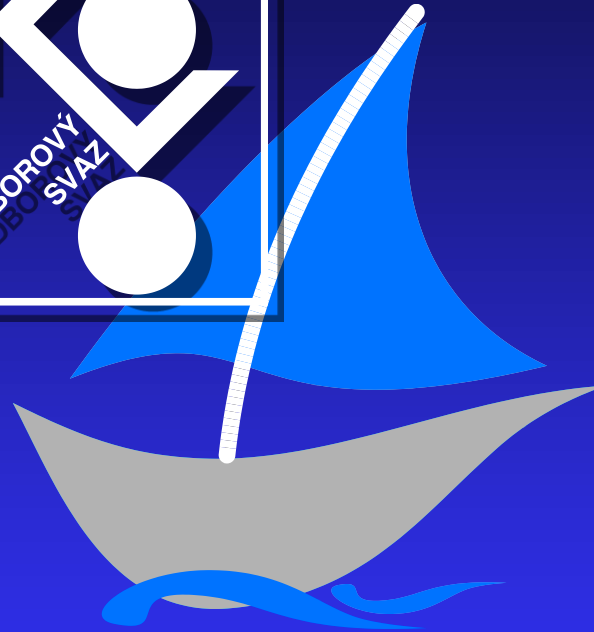
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*Solidarity and Cooperation  
Against Misusing Global Crisis*

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# ***Current information OS KOVO – Czech Republic***

## ***European Employee Network Agricultural Machinery Workshop***

***February 24, 2010***

***Praha, Hotel Artemis***

***Josef Středula, OS KOVO President***

## Where OS KOVO also operates?



## Automotive Industry

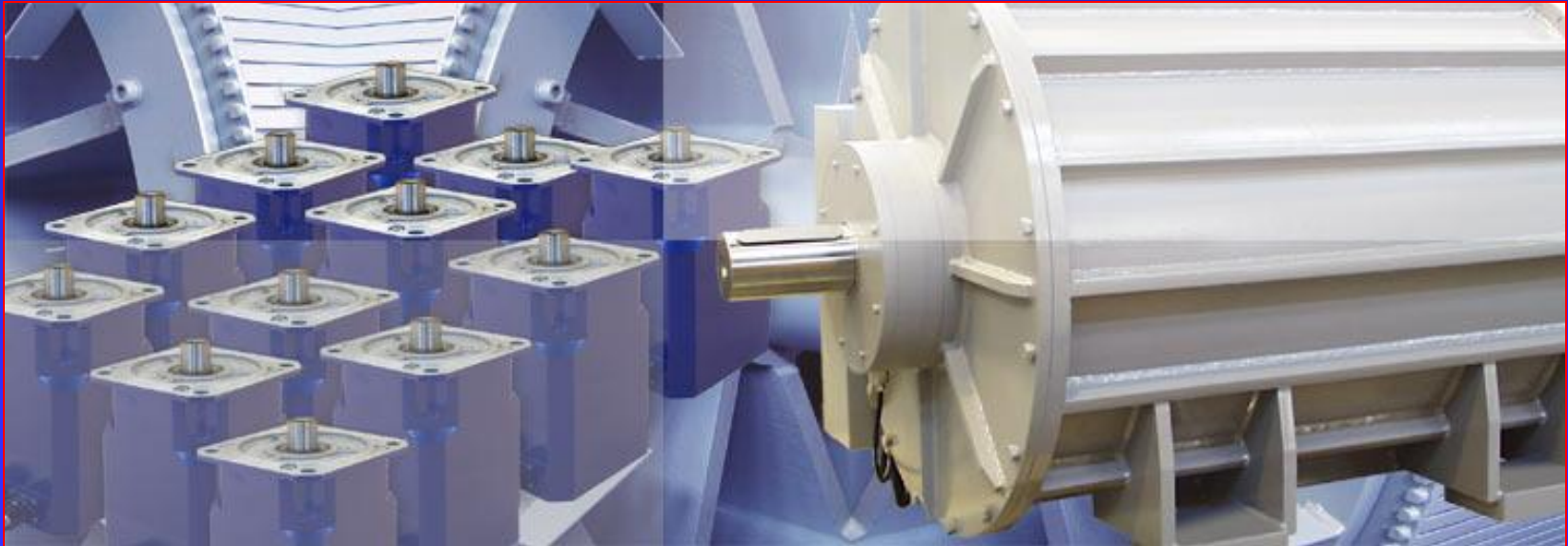




# Where OS KOVO also operates?



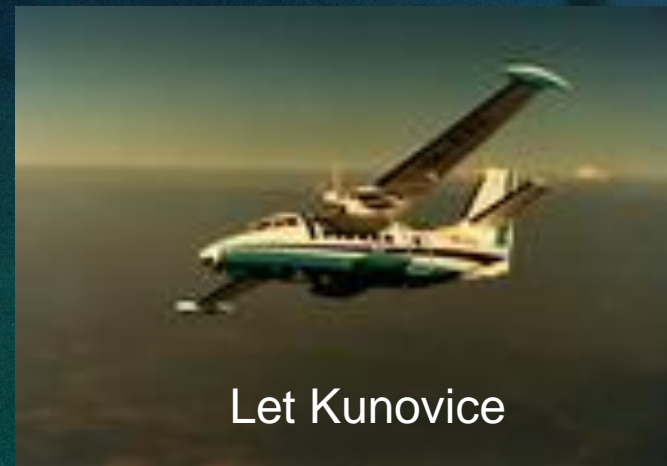
**Electrical Industry**



# Where OS KOVO also operates?



## Aerospace Industry



Let Kunovice





# Where OS KOVO also operates?



Metallurgy





# Where OS KOVO also operates?



**Machinery**



Vítkovice a.s.





# Where OS KOVO also operates?



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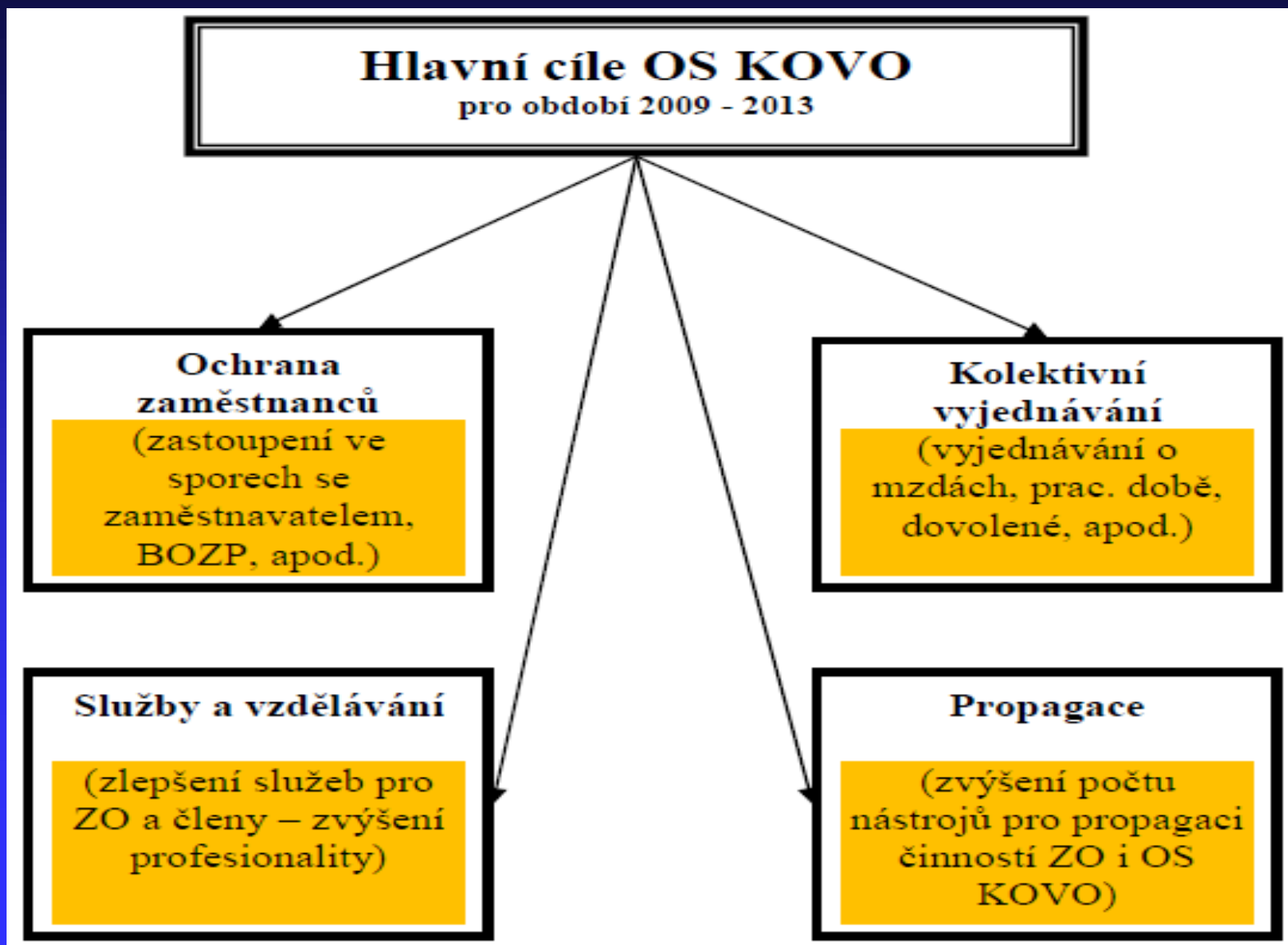
# Where OS KOVO also operates?



## Agricultural Machinery



# OS KOVO Policy







# What shall we face in coming period?

## Outside environment:

- Further deepening of the crisis with massive impacts for employment especially in 2010 - 2011
- Big fight for 2010 collective agreements
- Fight for new labour legislation and employees' position
  - Ongoing enforcement of new Civil Code
  - Employment Act changes



# What shall we face in coming period?

## Outside environment:

- Fight for the shape of pension reform
- Tax system reform
- Parliamentary elections with results that are difficult to anticipate including future orientation
- Restructuring of important transnational companies
- Other attempts to misuse crisis against employees

# Latest Economic Data

| Indicator  | Period              |      | Release Date     |
|--|---------------------|------|------------------|
| <u>Gross domestic product</u>                                  | 3rd quarter of 2009 | -4,1 | 9 December 2009  |
| <u>Consumer price index</u>                                    | January 2010        | 0,7  | 9 February 2010  |
| <u>Inflation rate</u>  | January 2010        | 0,9  | 9 February 2010  |
| <u>Industrial output</u>                                       | December 2009       | 1,8  | 11 February 2010 |
| <u>Construction output</u>                                     | December 2009       | 3,5  | 11 February 2010 |
| <u>Receipts from sales of retail trade</u><br>(CZ-NACE 45, 47) | December 2009       | -1,9 | 15 February 2010 |
| Average gross wages and salaries:<br>Nominal<br>Real           | 3rd quarter of 2009 | 4,8  | 4 December 2009  |
|  |                     | 4,7  |                  |
| External trade: <u>Imports</u><br><u>Exports</u>               | December 2009       | -2,6 | 8 February 2010  |
|  |                     | 4,8  |                  |
| Export and import price indices<br>import<br>export            | December 2009       |      | 15 February 2010 |
|  |                     | -3,2 |                  |
|  |                     | -3,9 |                  |
| <u>Unemployment rate</u> *                                     | end of January 2010 | 9,8* | 8 February 2010  |



## Obecná míra nezaměstnanosti dále poroste

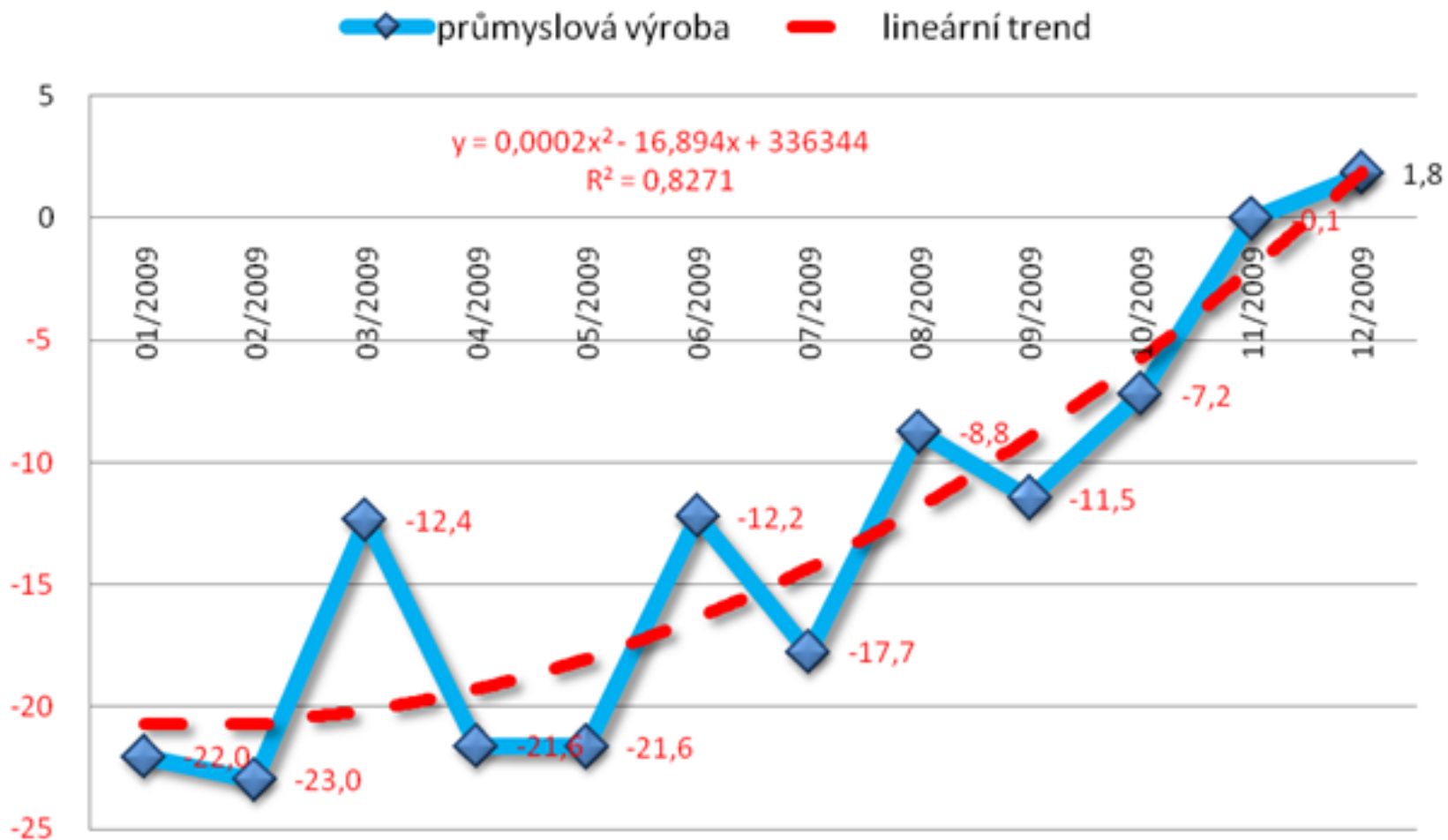
(meziroční změny v %)

|   | 2009 | 2010 | 2011 |
|---|------|------|------|
| Reálný hrubý disponibilní důchod domácností   | 1,1  | -0,8 | 2,8  |
| Zaměstnanost celkem                           | -1,4 | -1,2 | -0,5 |
| Míra nezaměstnanosti (v %) <sup>a)</sup>      | 6,6  | 8,1  | 9,0  |
| Produktivita práce                            | -3,2 | 2,7  | 2,7  |
| Průměrná nominální mzda                       | 2,6  | 2,2  | 3,9  |
| Průměrná nominální mzda v podnikatelské sféře | 2,2  | 3,0  | 4,6  |
| Podíl deficitu BÚ na HDP (v %)                | -1,1 | -0,8 | -0,8 |
| M2  | 5,7  | 1,1  | 4,1  |

a) dle metodiky ILO

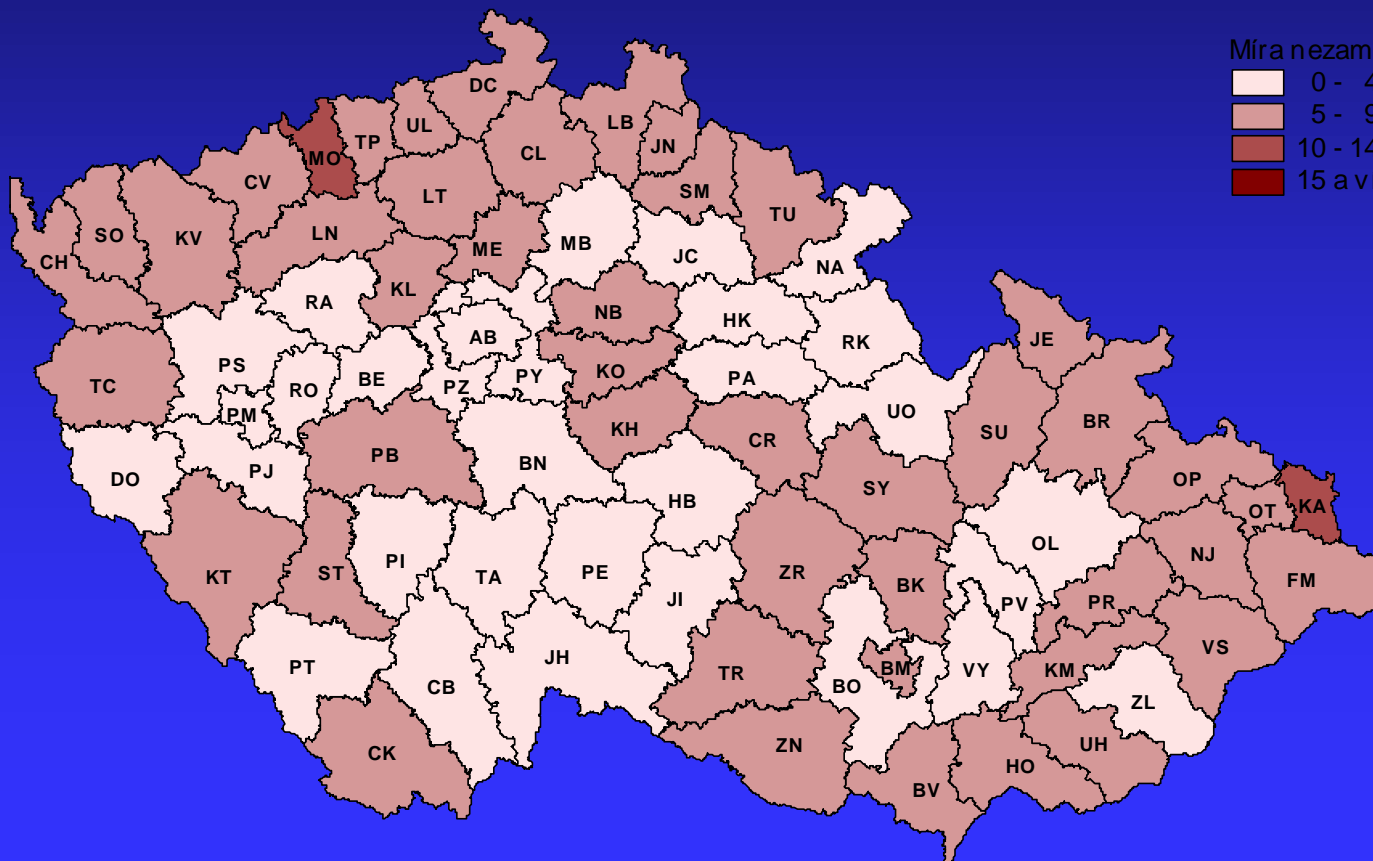
# Situation in Industry, December 2009

Meziroční přírůstky průmyslové výroby v %



# Unemployment, October 2008

## MÍRA NEZAMĚSTANOSTI V OKRESECH ČESKÉ REPUBLIKY k 31. říjnu 2008



0 100 200 300 km

MPSV - VEØ

Zhotoveno v odd. 143 MPSV

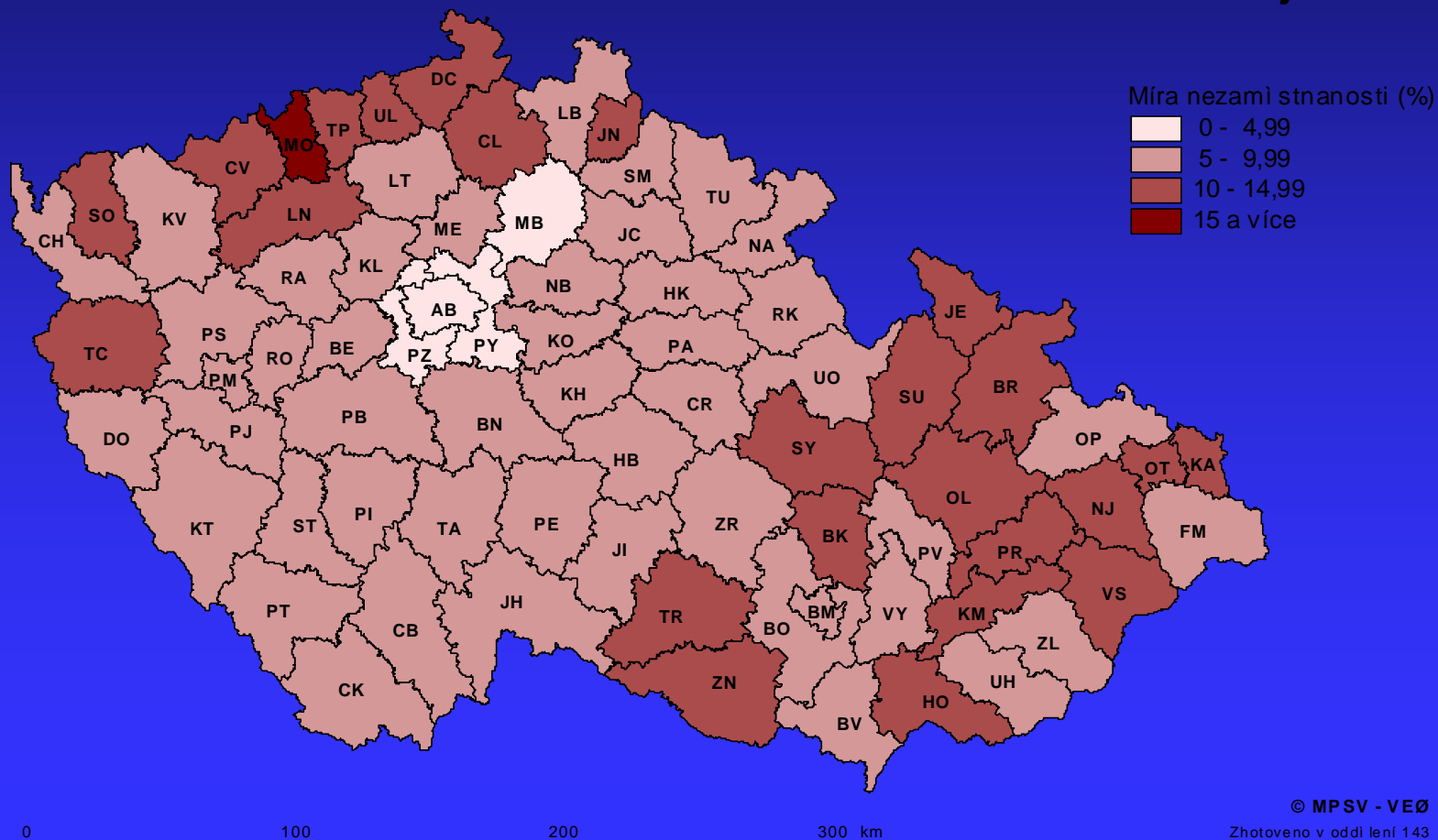
Datum zhotovení 10.11. 2008



# Unemployment Rate

## 30. 10. 2009 = 8,5%

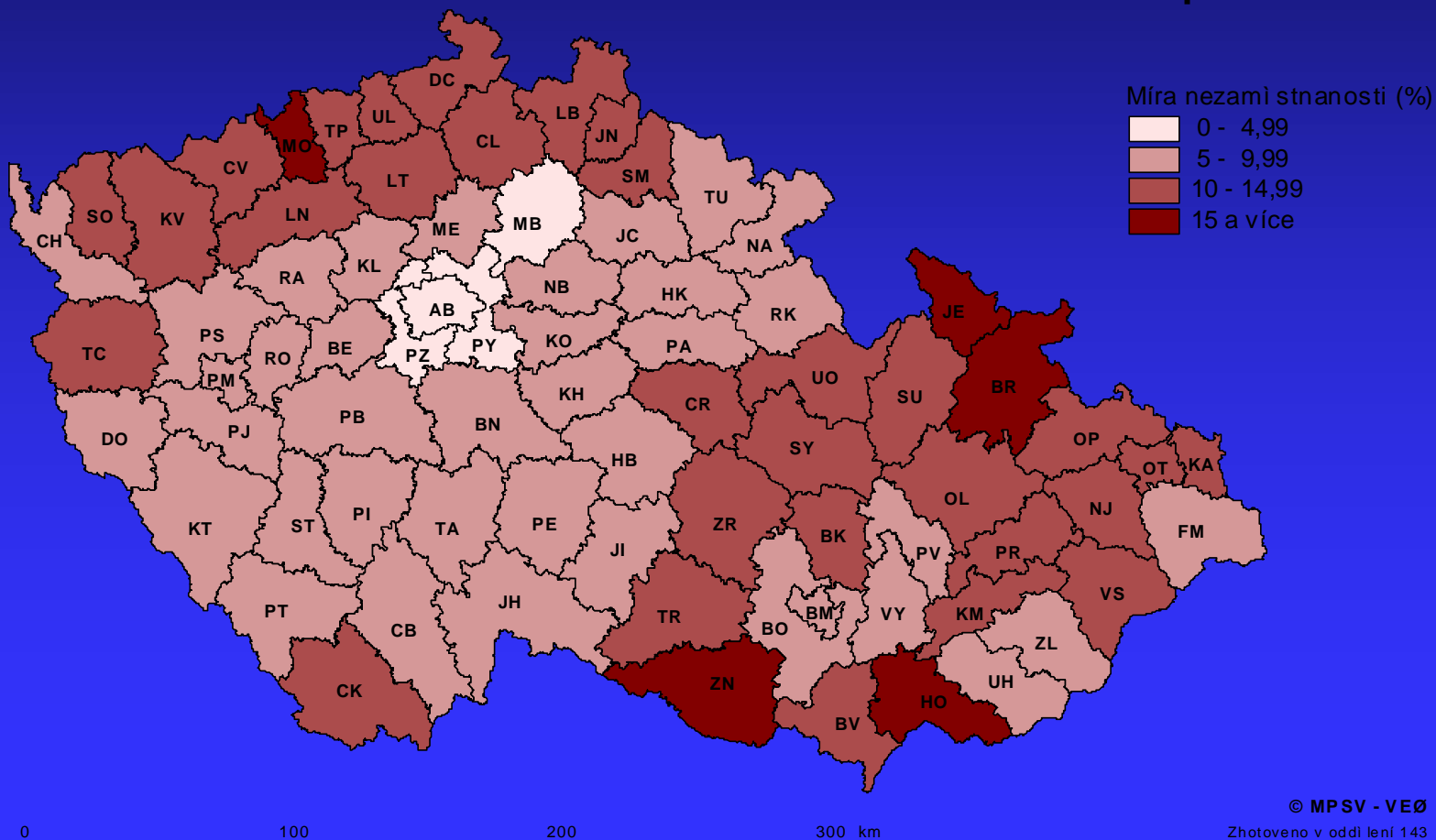
Míra nezaměstnanosti v okresech České republiky  
k 31. říjnu 2009



# Unemployment Rate

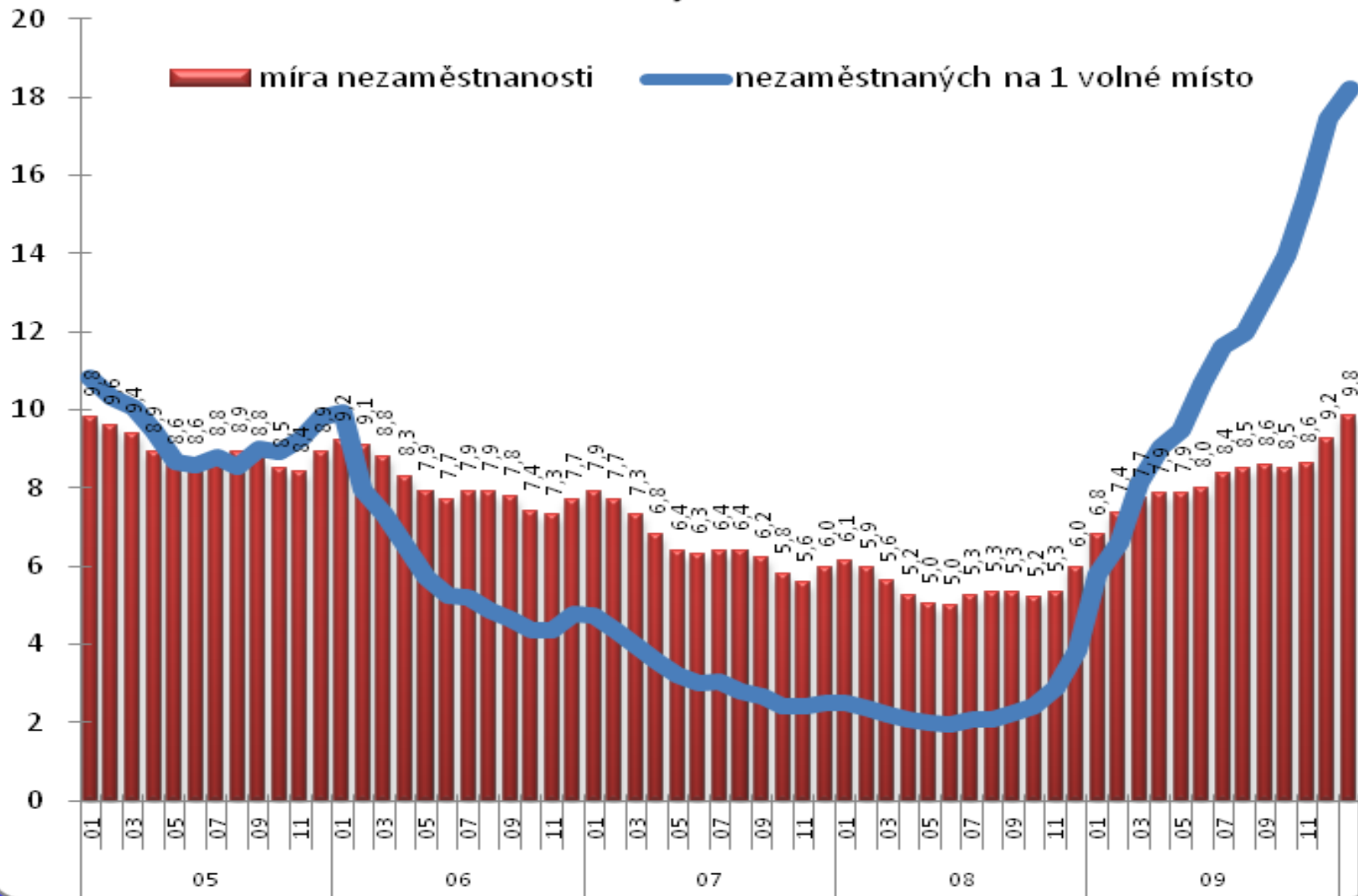
## 31. 12. 2009 = 9,2%

Míra nezaměstnanosti v okresech České republiky  
k 31. prosinci 2009



# Unemployment Rate Development

Vývoj míry nezaměstnanosti a počtu nezaměstnaných na 1 volné místo





# Wage versus Minimum Wage, 1993 - 2008

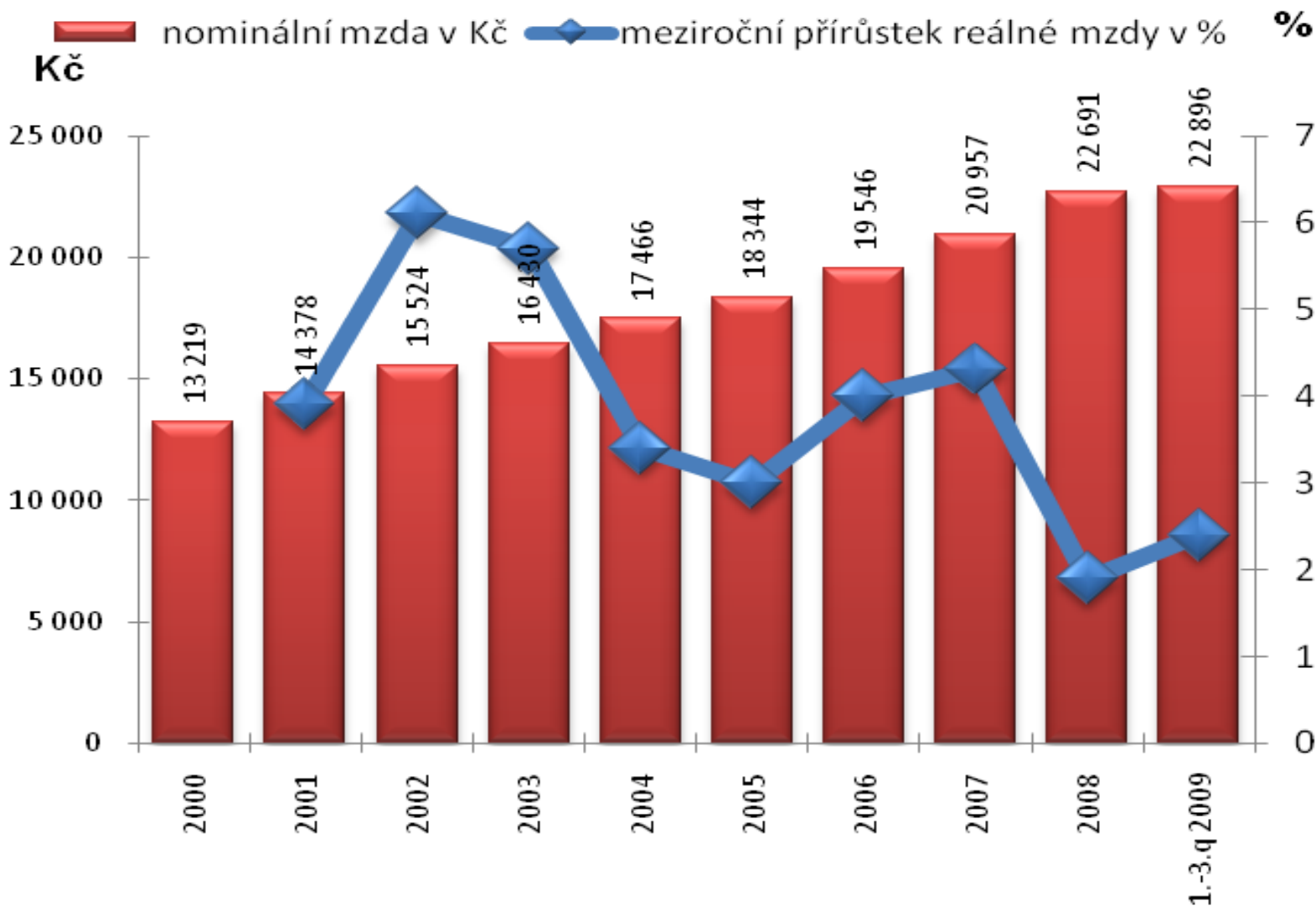
| Year | Average wage CZK */ | Minimum wage CZK **/ | Minimum wage as share of average wage, % |
|------|---------------------|----------------------|--|
| 1993 | 5 904               | 2 200                | 37,3                                     |
| 1994 | 7 004               | 2 200                | 31,4                                     |
| 1995 | 8 307               | 2 200                | 26,5                                     |
| 1996 | 9 825               | 2 500                | 25,4                                     |
| 1997 | 10 802              | 2 500                | 23,1                                     |
| 1998 | 11 801              | 2 650                | 22,5                                     |
| 1999 | 12 797              | 3 250                | 25,4                                     |
| 2000 | 13 594              | 4 000                | 29,4                                     |
| 2001 | 14 750              | 5 000                | 33,9                                     |
| 2002 | 15 911              | 5 700                | 35,8                                     |
| 2003 | 16 905              | 6 200                | 36,7                                     |
| 2004 | 18 025              | 6 700                | 37,2                                     |
| 2005 | 18 940              | 7 185                | 37,9                                     |
| 2006 | 20 158              | 7 570                | 37,6                                     |
| 2007 | 21 621              | 8 000                | 37,0                                     |
| 2008 | 23 430              | 8 000                | 34,1                                     |

\*/ Source: ČSÚ, ČR od roku 1989 v číslech - trh práce, fyzické osoby

\*\*/ Minimum wage valid from January 1 of the respective year

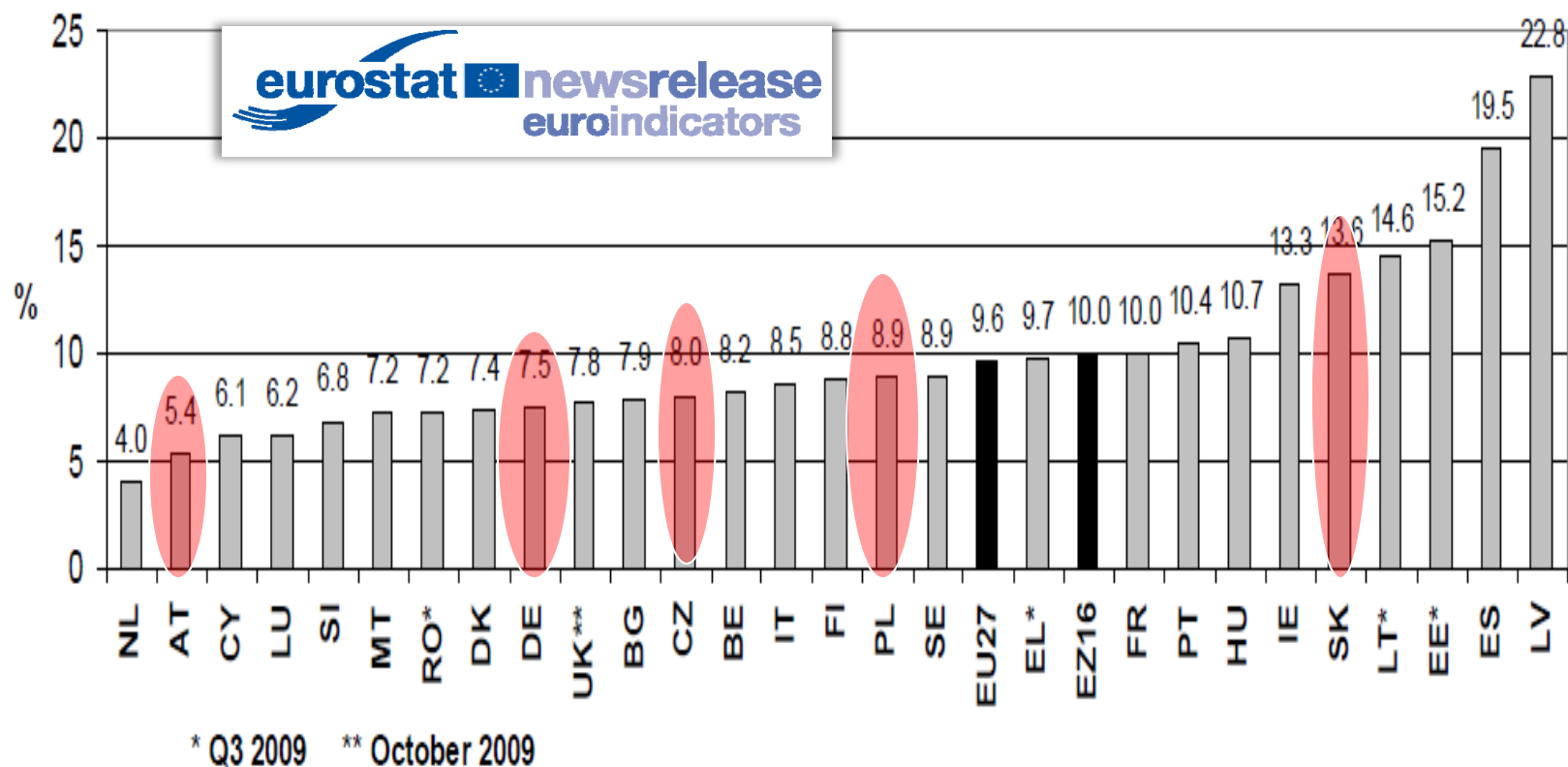
# Wage Development: 2000 – 3. Q 2009

## Vývoj mezd v Kč na přepočtené osoby



# Harmonized Unemployment Rates in EU 27 11/2009 – 10%

Unemployment rates in December 2009, seasonally adjusted



# Inflation EU 27, November 2009



## Annual inflation (%) in December 2009 in ascending order

### Euro area

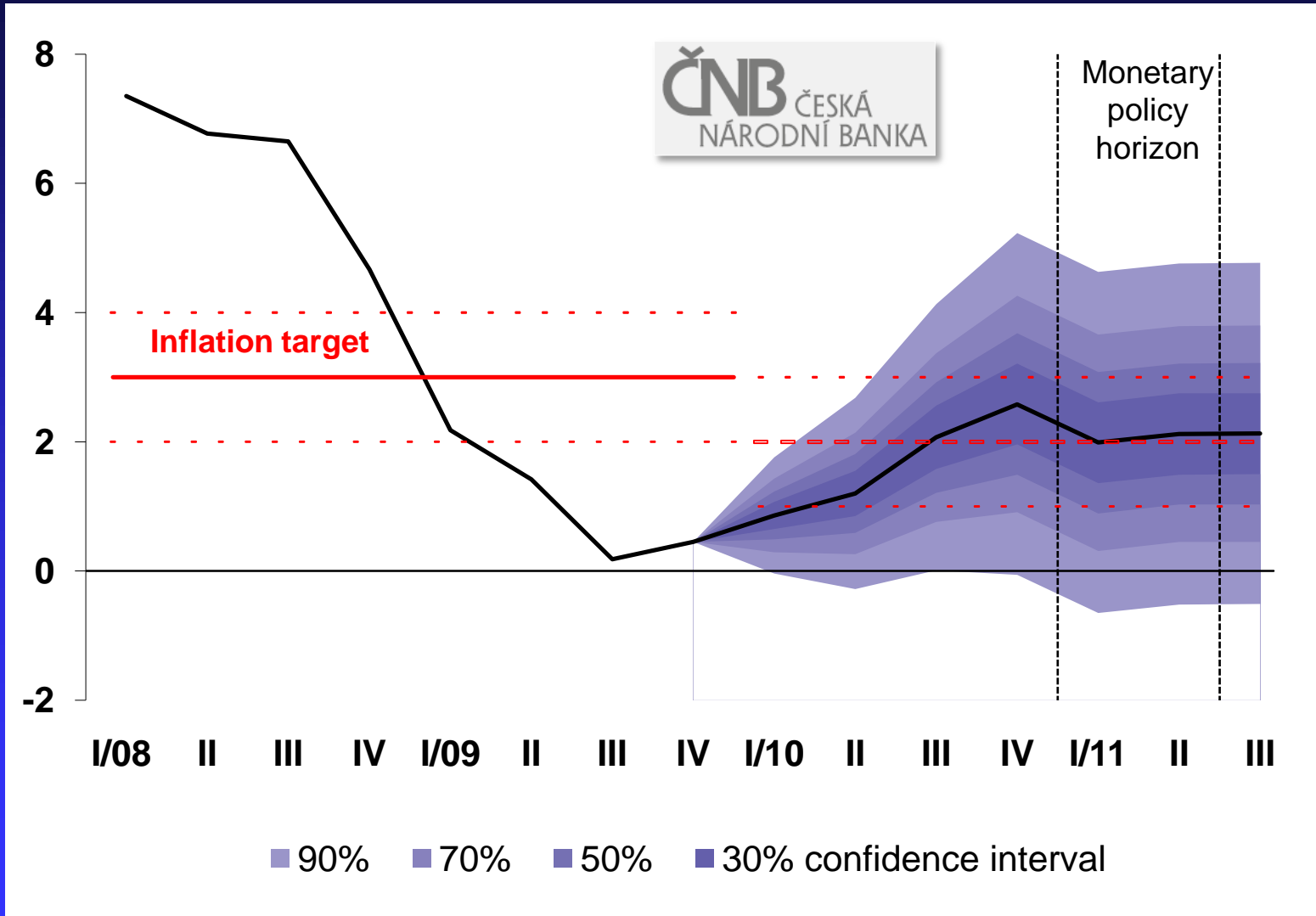
| IE   | MT   | PT   | SK  | BE  | NL   | DE  | ES  | Euro area | FR  | IT  | AT   | CY  | FI  | SI  | LU  | EL  |
|------|------|------|-----|-----|------|-----|-----|-----------|-----|-----|------|-----|-----|-----|-----|-----|
| -2.6 | -0.4 | -0.1 | 0.0 | 0.3 | 0.7p | 0.8 | 0.9 | 0.9p      | 1.0 | 1.1 | 1.1p | 1.6 | 1.8 | 2.1 | 2.5 | 2.6 |

### EU Member States outside the euro area

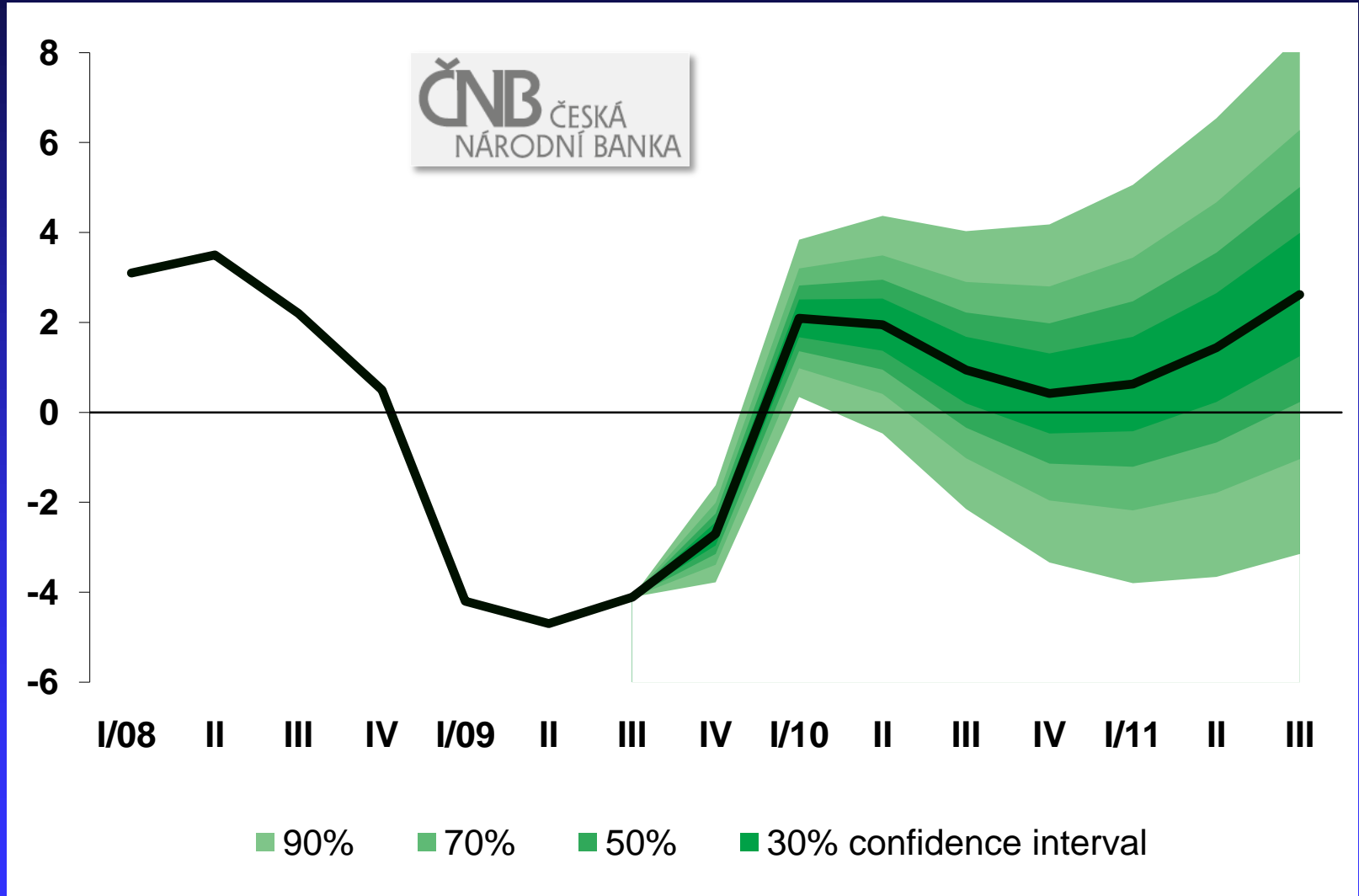
| EE   | LV   | CZ  | DK  | LT  | EU   | BG  | UK <sup>5</sup> | SE  | PL  | RO  | HU  |
|------|------|-----|-----|-----|------|-----|-----------------|-----|-----|-----|-----|
| -1.9 | -1.4 | 0.5 | 1.2 | 1.2 | 1.4p | 1.6 | Nov 09<br>1.9   | 2.8 | 3.8 | 4.7 | 5.4 |



# Current Inflation Prognosis, ČNB 4. 2. 2010



# GDP Development Prognosis, ČNB 4. 2. 2010





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*Thank you for your attention!*



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*Solidaritou a spoluprací  
proti zneužívání globální krize*