

# De anderhalvemeter economie gemeten

(10)(2e)  
(onderzoek met (10)(2e))



# Anderhalvemeterconomie noodzakelijk

*Veel vragen over impact en gevolgen*



Rabobank

VEEL SECTOREN NOG NIET KLAAR VOOR 1,5 METER-ECONOMIE

**Kabinet eist coronaplan van alle sectoren, 'anders niet open'**

**Anderhalvemeterconomie laat hersenen Groninger ondernemers 24 uur kraken**

**Anderhalve meter-economie in restaurants? 'Op onze eerste brainstormsessie kwamen we er niet uit'**

## Drie hoofdvragen



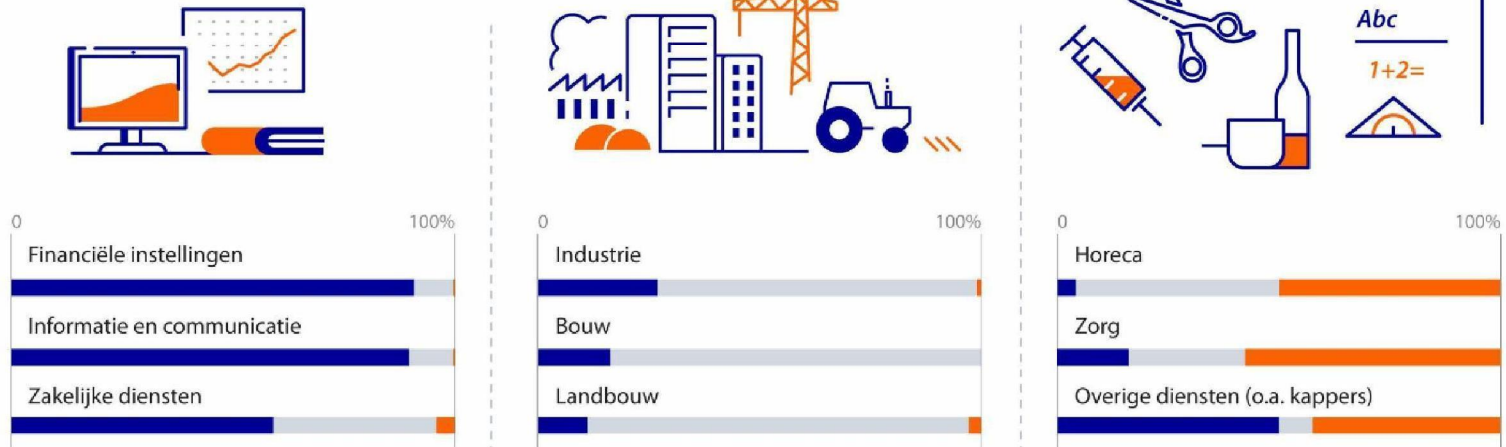
- Hoe groot is de anderhalvemeterconomie?
- Wat zijn de verschillen tussen sectoren en regio's?
- Wat is er nodig?

# De Nederlandse anderhalvemeter economie



89 procent van de economie kan op anderhalve meter afstand draaien, 43 procent zelfs volledig vanuit huis. In sommige sectoren is afstand houden makkelijker dan in andere

■ thuiswerken mogelijk    ■ contactarm werk buitenshuis    ■ contactrijk werk buitenshuis

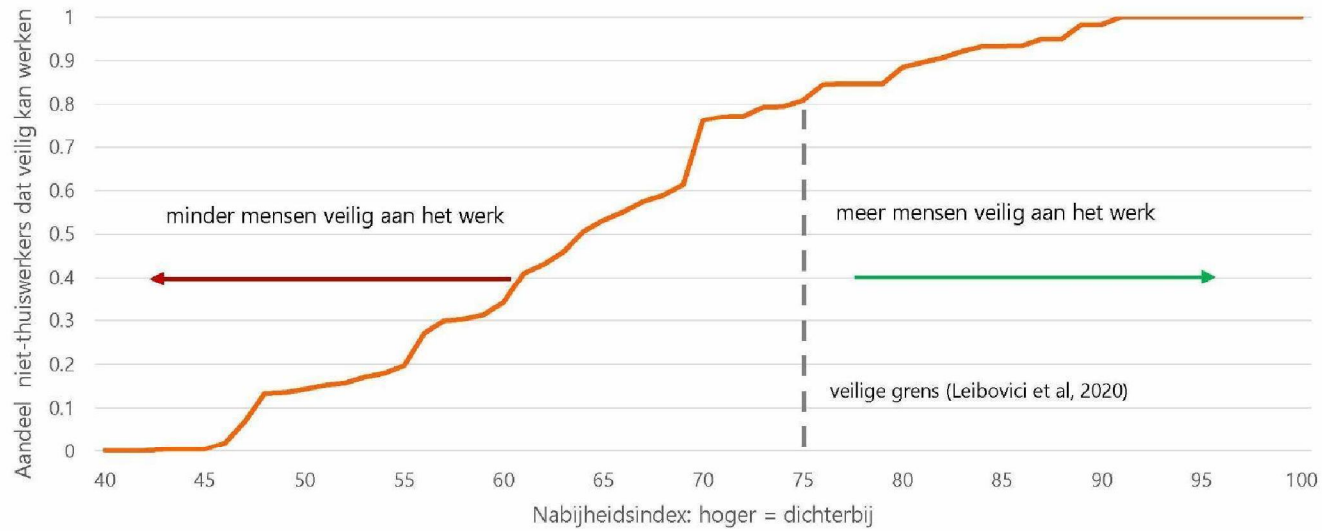


Bron: RaboResearch

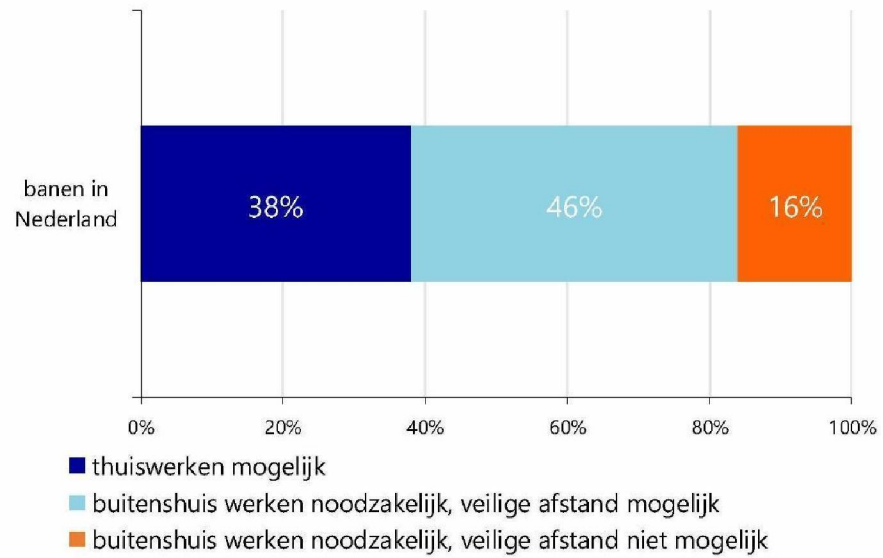
## Hoe gemeten?



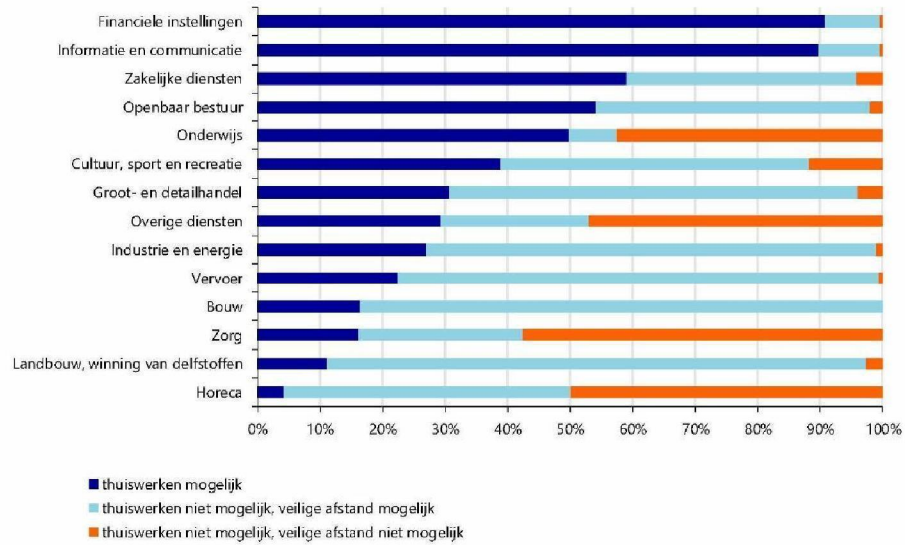
# Versoepeling maatregelen betekent meer mensen aan het werk



## De anderhalvemeter-economie beslaat 84 procent van de banen



# Verschillen tussen sectoren zijn groot

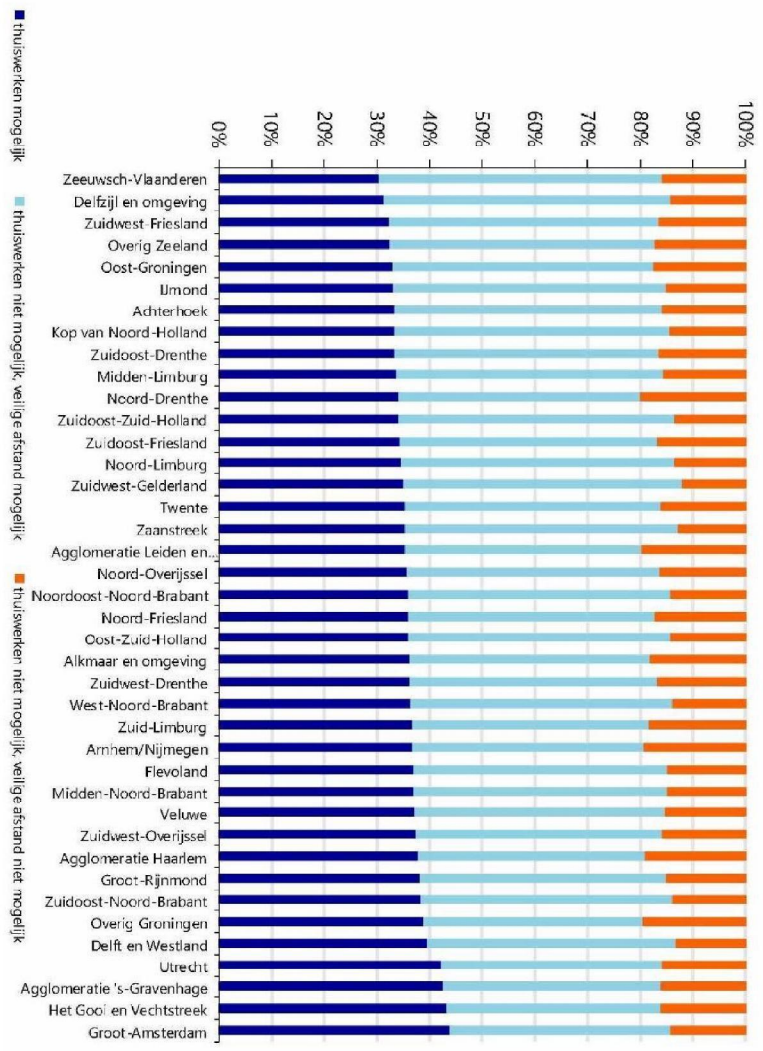


## Wat is er nodig?



- Voor mensen: verandering van gedrag
- Voor bedrijven: inrichting werkplekken en verdienmodellen
- Voor ruimtelijke ordening en mobiliteit

# Verschillen tussen regio's zijn klein





# Economic impact COVID-19

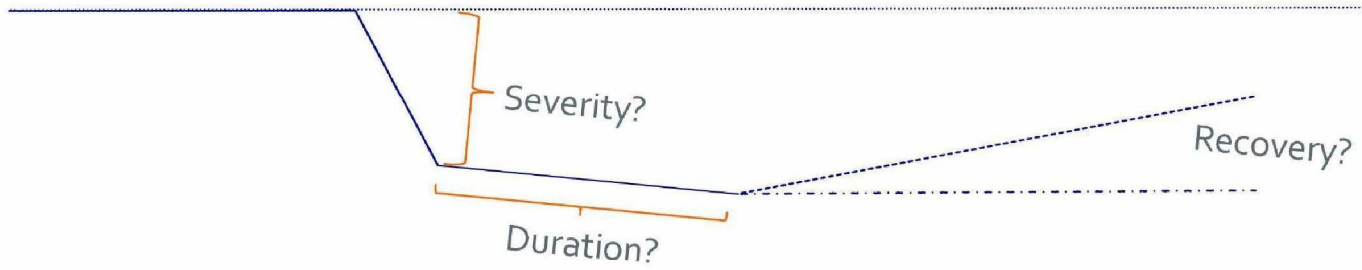
*The Netherlands*

Appendix

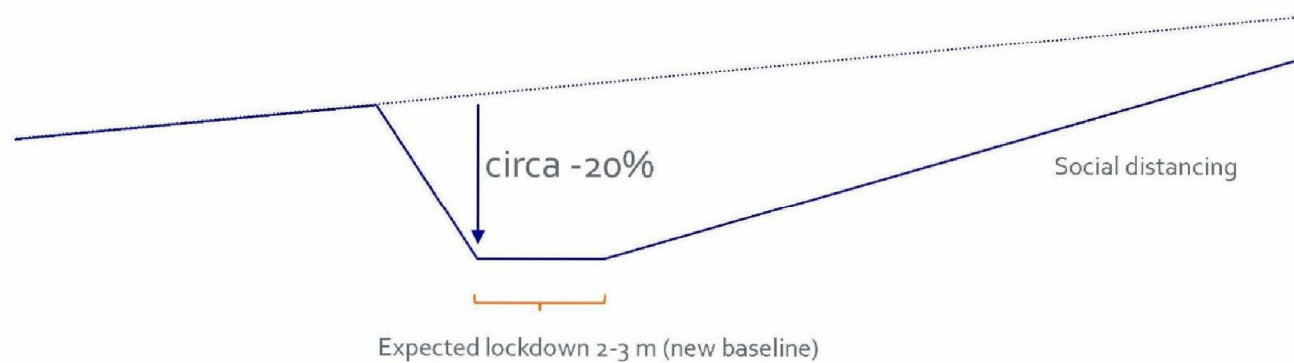


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# Lockdown uncertainties



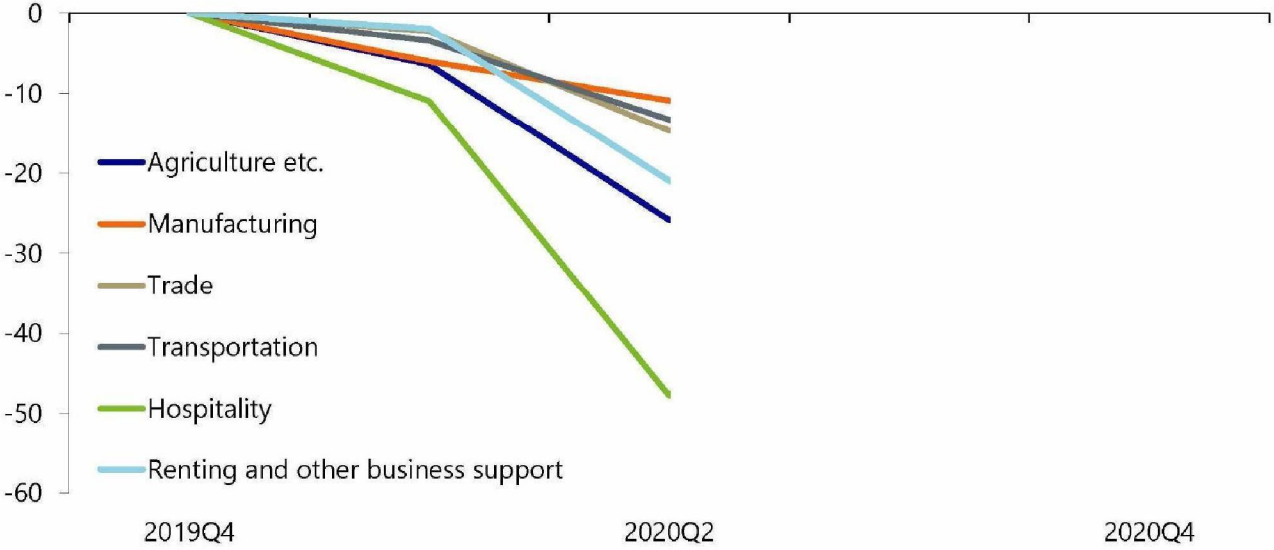
# Baseline scenario



# Decline by sector (value added, NL)



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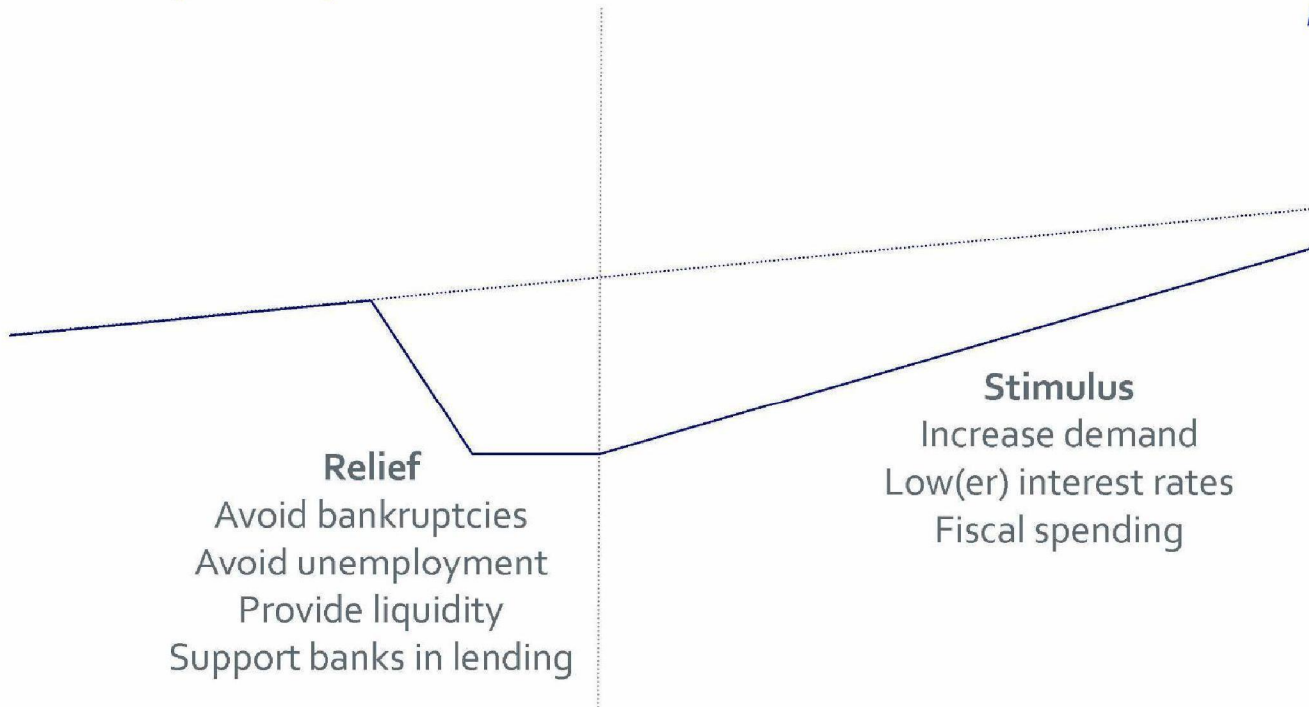
# Lockdown assumptions



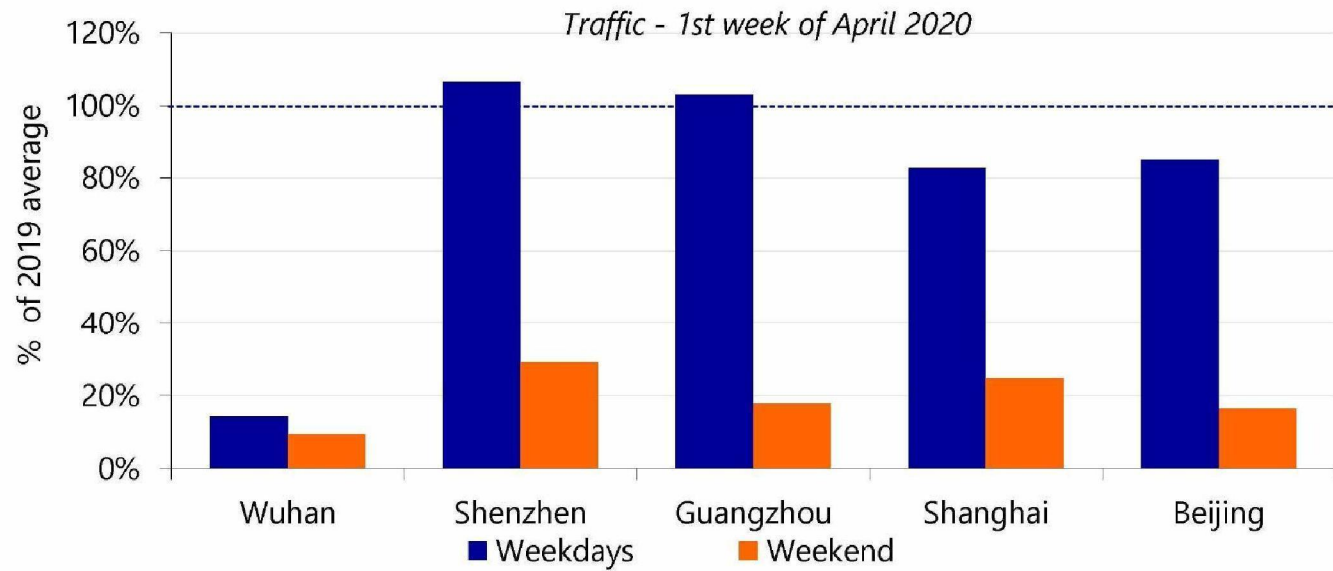
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| Country        | Q1 2020 | Q2 2020 | Expected end of lockdown |
|----------------|---------|---------|--------------------------|
| Australia      | 1       | 4       | End April                |
| Belgium        | 2       | 8       | End May                  |
| Brazil         | 1       | 3       | Second week April        |
| Canada         | -       | 3       | Mid-April                |
| China          | 6       | 2       | Second week April        |
| Mexico         | -       | 4       | End April                |
| New Zealand    | 1       | 4       | End April                |
| Netherland     | 2       | 8       | End May                  |
| India          | 1       | 2       | Second week April        |
| Indonesia      | 1       | 4       | End April                |
| Italy          | 3       | 8       | End May                  |
| Japan          | 1       | 4       | End April                |
| France         | 2       | 8       | End May                  |
| Germany        | 2       | 8       | End May                  |
| Spain          | 2       | 8       | End May                  |
| United Kingdom | 1       | 8       | End May                  |
| United States  | 2       | 8       | End May                  |

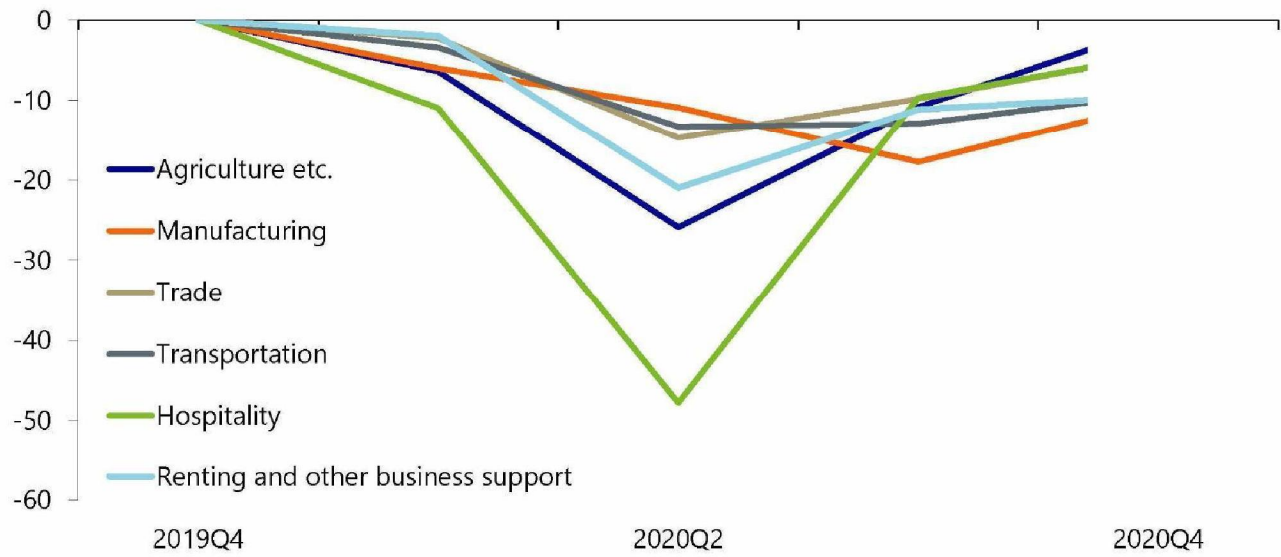
# Policy response



# Lockdown recovery takes time



# Recovery by sector (value added, NL)



# Recession and recovery



| GDP %y/y                             |      | IT    | UK    | US    | ES    | EA    | NL    | DE    | FR    | BR    | AU   | CN   |
|--------------------------------------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|------|
| Baseline                             | 2020 | -7.2  | -6.8  | -6.4  | -5.9  | -5.2  | -5.0  | -4.6  | -4.6  | -1.8  | -3.2 | +1.2 |
|                                      | 2021 | +3.6  | +4.6  | +4.5  | +5.0  | +4.3  | +4.9  | +4.2  | +3.8  | +3.2  | +4.1 | +6.2 |
| Downside risk<br>"Extended lockdown" | 2020 | -12.6 | -13.9 | -16.9 | -13.5 | -12.0 | -14.0 | -11.1 | -11.3 | -7.1  | -7.8 | -3.2 |
|                                      | 2021 | +4.8  | +8.3  | +12.0 | +9.4  | +8.3  | +11.0 | +8.4  | +7.7  | +10.7 | +7.4 | +9.6 |

<https://economics.rabobank.com/publications/2020/april/global-economic-contraction/>

<https://economie.rabobank.com/publicaties/2020/april/nederlandse-economie-krimpt-dit-jaar-harder-dan-in-2009/>

# Economic forecast Netherlands

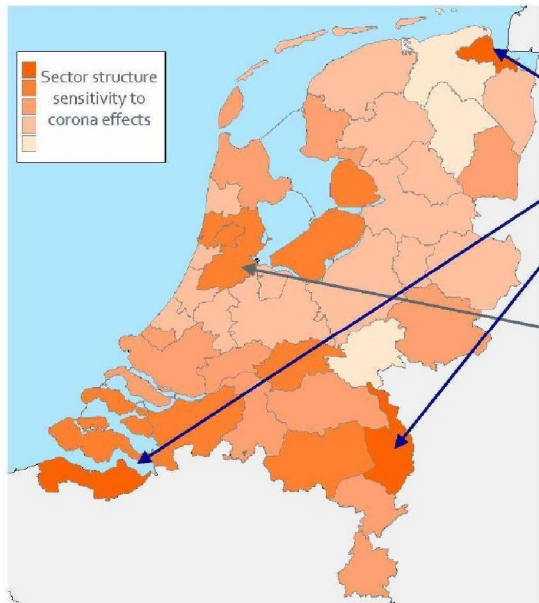


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|                        | 2019       | 2020        | 2021       |
|------------------------|------------|-------------|------------|
| <b>GDP</b>             | <b>1.8</b> | <b>-5.0</b> | <b>4.9</b> |
| Private consumption    | 1.4        | -4.4        | 4.1        |
| Government consumption | 1.6        | 2.0         | 2.0        |
| Business investment    | 7.0        | -7.4        | 5.3        |
| Government investment  | 4.1        | 1.7         | 2.6        |
| Export                 | 2.4        | -14.1       | 14.8       |
| Import                 | 3.2        | -13.8       | 15.1       |
| Consumer prices (HICP) | 2.7        | 0.7         | 1.5        |
| Unemployment rate      | 3.4        | 6.1         | 6.5        |
| House prices           | 6.9        | 3.9         | -3.3       |

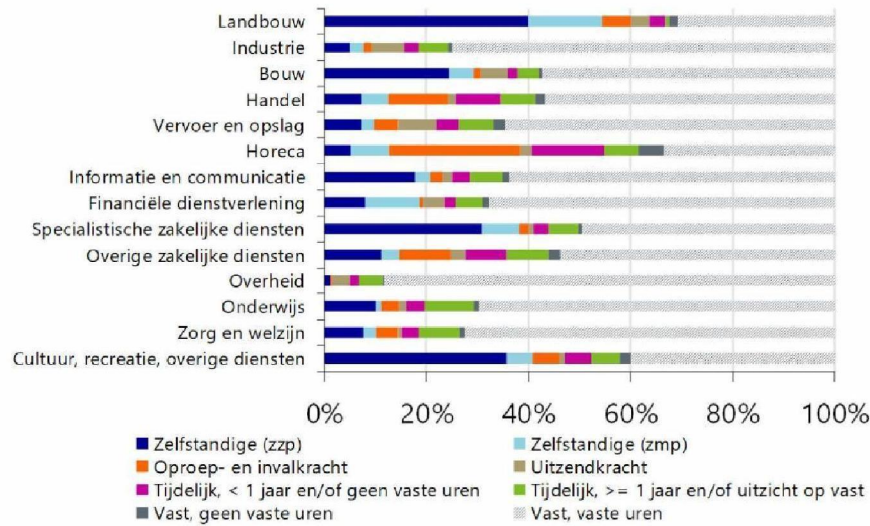
| NL sector added value              | 2019 | 2020 | 2021 |
|------------------------------------|------|------|------|
| Agriculture, forestry, fishing     | 0.8  | -10  | 10   |
| Manufacturing                      | 0.8  | -11  | 4    |
| Construction                       | 4.8  | -6   | -3   |
| Wholesale and retail trade         | 3.0  | -7   | 8    |
| Transportation and storage         | 0.8  | -9   | 4    |
| Hospitality                        | 1.5  | -18  | 22   |
| Information and communication      | 3.5  | -2   | 3    |
| Specialized business services      | 3.7  | -6   | 4    |
| Renting and other business support | 1.6  | -10  | 1    |
| Education                          | -0.3 | 1    | 3    |
| Health and social work activities  | 2.6  | 3    | 2    |

# Regional impact



| NL sector added value              | 2019 | 2020 | 2021 |
|------------------------------------|------|------|------|
| Agriculture, forestry, fishing     | 0.8  | -10  | 10   |
| Manufacturing                      | 0.8  | -11  | 4    |
| Construction                       | 4.8  | -6   | -3   |
| Wholesale and retail trade         | 3.0  | -7   | 8    |
| Transportation and storage         | 0.8  | -9   | 4    |
| Hospitality                        | 1.5  | -18  | 22   |
| Information and communication      | 3.5  | -2   | 3    |
| Specialized business services      | 3.7  | -6   | 4    |
| Renting and other business support | 1.6  | -10  | 1    |
| Education                          | -0.3 | 1    | 3    |
| Health and social work activities  | 2.6  | 3    | 2    |

# Veel flex in hard geraakte sectoren



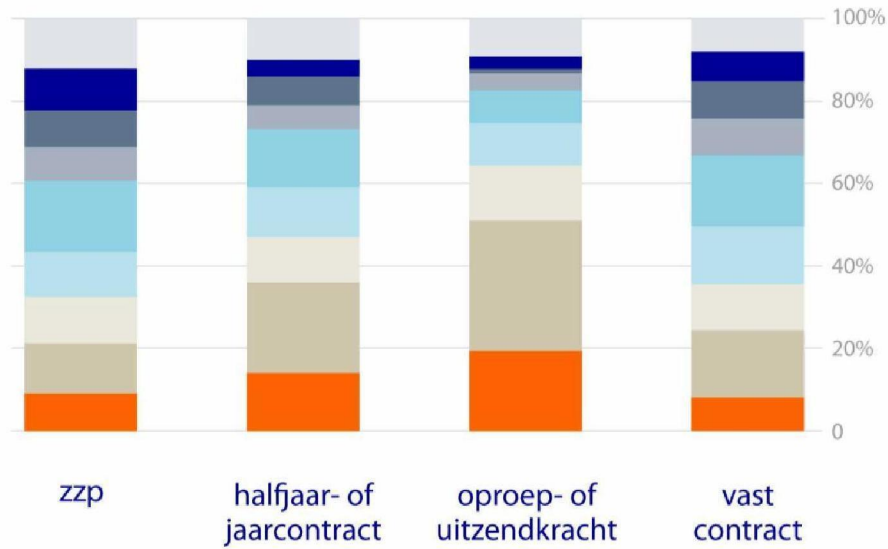
- Flexibele schil in NL
  - 1,9 mln flex werknemers
  - 1,5 mln zelfstandigen
- 1 miljoen personen minder uren
- Daarvan worden officieel 'werkloos': 500k mensen
  - 3 criteria
    - geen betaald werk
    - zoeken werk
    - beschikbaar
  - Werkloosheid piekt op bijna 8%.

## Veel flexwerkers hebben nauwelijks spaargeld

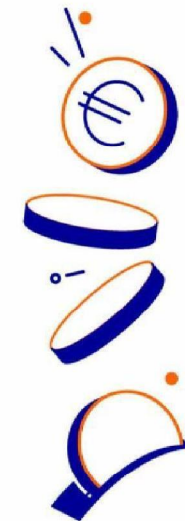
Spaargeld van zelfstandig wonende, niet-studerende flexwerkers tussen de 20 en 45 jaar oud



- Geen antwoord
- €50.000 of meer
- €30.000 - €50.000
- €20.000 - €30.000
- €10.000 - €20.000
- €5.000 - €10.000
- €2.500 - €5.000
- €0 - €2.500
- Geen spaargeld



Bron: RaboResearch



# Relevant publications

[economie.rabobank.com](http://economie.rabobank.com)



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[Global Economic Contraction: Re-assessing the impact of COVID-19 \(Engelstalig\)](#)

[Nederlandse economie krimpt dit jaar harder dan in 2009 – vragen en antwoorden](#)

[Effecten van coronacrisis op regionale economieën](#)

[De coronacrisis en de huizenmarkt: vraag en antwoord](#)

[Coronacrisis raakt flexibele schil](#)

[Covid-19 paralyzes Eurozone economy: Lockdowns lead to very large contractions](#)

[The US recession of 2020 - The horror version](#)

[Het coronavirus en de economie: depressie, oorlog of natuurramp?](#)

[Coronacrisis vraagt om een nieuwe inrichting van de Nederlandse samenleving](#)

[De anderhalvemeter economie van Nederland gemeten](#)