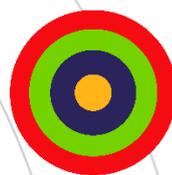


AD&C á conversa com...



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Agência para o
Desenvolvimento e
Coesão, I.P.

**Comparação de Portugal
com outros 11 países**
utilizando o Atlas da Complexidade Económica

José Félix Ribeiro

Economista e especialista em prospetiva

2 12
2 maio

AD&C à conversa com...



CRESCIMENTO E SEUS FATORES

Comparação de Portugal com outros 11 países
(10 pequenas economias abertas +Espanha)
utilizando o Atlas da Complexidade Económica

1. Os países selecionados

Foram as seguintes os critérios de seleção dos Países cujas economias se pretendeu comparar com Portugal

- a) Escolheram-se países que são pequenas economias abertas como casos a comparar com Portugal. Com a exceção de Espanha - uma economia de média dimensão na Europa, que se incluiu pela sua relevância como único país vizinho de Portugal e seu principal parceiro económico.
- b) Escolheram-se basicamente países da União Europeia, para ter em conta um enquadramento comum em termos de um cada vez maior número de políticas públicas com impacto no crescimento. Fez-se exceção ao caso de Israel, que tem relações económicas estreitas com União Europeia, mas também com os EUA (tal como acontece com a Irlanda).
- c) Escolheram-se principalmente países que estiveram envolvidos em Alargamentos distintos da CEE /EU: (com uma única exceção -Israel)

- 3 Países da Europa do Sul que aderiram à CEE em 1986 - três países que tinham feito a transição de regimes autoritários para regimes democráticos-Portugal, Espanha e Grécia
- 7 Países pertencentes à Europa Central e de Leste que fizeram a transição de regimes políticos socialistas para regimes democráticos e de economias estatizadas para economias de mercado A escolha incidu sobre
- Quatro países da Europa Central que aderiram à EU a partir de 2003 que pertenceram ao Império austro húngaro até à dissolução deste nos pós 1ª guerra mundial e que são pequenas economias abertas: República Checa, Eslováquia, Hungria e Eslovénia - aos quais de agregou a Áustria que aderiu à União Europeia na década de 90 do Século XX e que pertence ao mesmo espaço histórico austro húngaro.
- Três Países Bálticos-Estónia. Letónia e Lituânia que aderiram à União Europeia pós 2003
- 2 países que combinam na sua presença internacional uma relação económica com a União Europeia e com os EUA: a Irlanda, -Estado membro da União Europeia e Israel, ambos pequenas economias abertas.

2. Utilização do Atlas da Complexidade Económica para comparar as economias destes 12 países

2.1. O Atlas da Complexidade Económica



O ATLAS DA COMPLEXIDADE ECONÓMICA

O Atlas da Complexidade Económica pode ser considerado um novo modelo empírico desenvolvido por Ricardo Hausmann com contribuições de César A. Hidalgo; Sebastián Bustos; Michele Cosci; Alexander Simoes; e Muhammed A. Yildirim.

Tem como referência teórica o livro THE ATLAS OF ECONOMIC COMPLEXITY MAPPING PATHS TO PROSPERITY 2013.

Na visão do Atlas é possível estabelecer uma correlação positiva entre a diversidade e complexidade de produtos oferecidos por cada país e o seu desenvolvimento económico. Os autores do Atlas acreditam, portanto, que quanto mais diversidade de produtos complexos um país é capaz de produzir, mais desenvolvida e bem-sucedida é a sua economia.

A complexidade económica de um país pode ser medida através da complexidade e diversidade dos produtos oferecidos pelo mesmo. Assim, os autores do Atlas da Complexidade defendem que: (i) a quantidade de diferentes produtos oferecidos por um país influencia a sua complexidade económica; (ii) a complexidade de cada produto também influencia a complexidade económica de um país, sendo que a complexidade de um produto está relacionada com a diversidade de conhecimento necessária para a produção e disponibilização deste produto.

No Atlas da Complexidade compara-se a lista de produtos exportados de um determinado país, através da elaboração de índices a partir do grau de ubiquidade e de diversidade de seus produtos, que determinam o nível de complexidade e, desta forma, demonstram o grau de sofisticação da cadeia produtiva de um país.

Research from the Growth Lab finds that countries whose exports are more complex than expected for their income level, grow faster. Growth can therefore be driven by a process of diversifying knowhow to produce a broader, and increasingly more complex, set of goods and services.

Nota

O Atlas de Complexidade Económica tem uma listagem de setores considerados de “Complexidade Económica” centrado na indústria, mas não incluindo nem os setores industriais ligados às tecnologias de informação e do audiovisual e à instrumentação e não explorando a importância crescente dos serviços de intensidade tecnológica. Por isso países com forte peso dos setores automóvel do material elétrico e de mecânica ficam melhor posicionados nos rankings

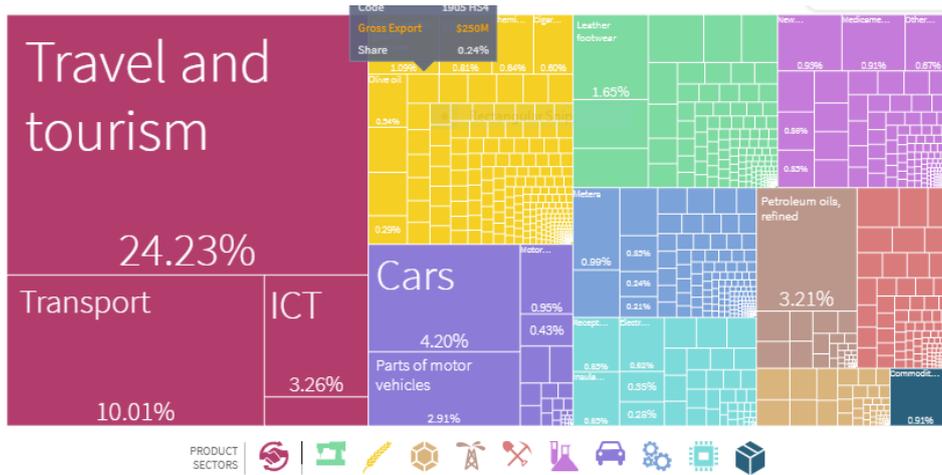
2.2. Posição dos 12 Países considerados no ranking da Complexidade Económica por áreas geográfico-históricas

EUROPA DO SUL

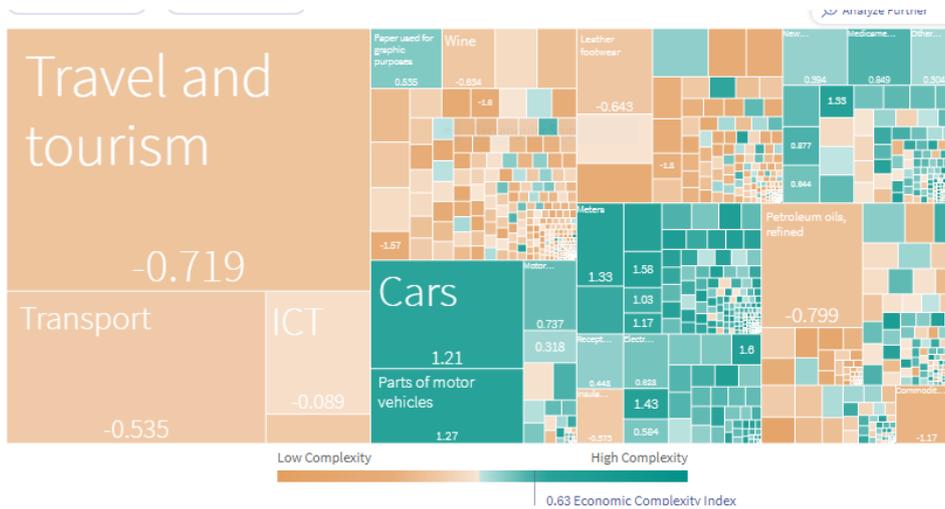
PORTUGAL | Posição 38



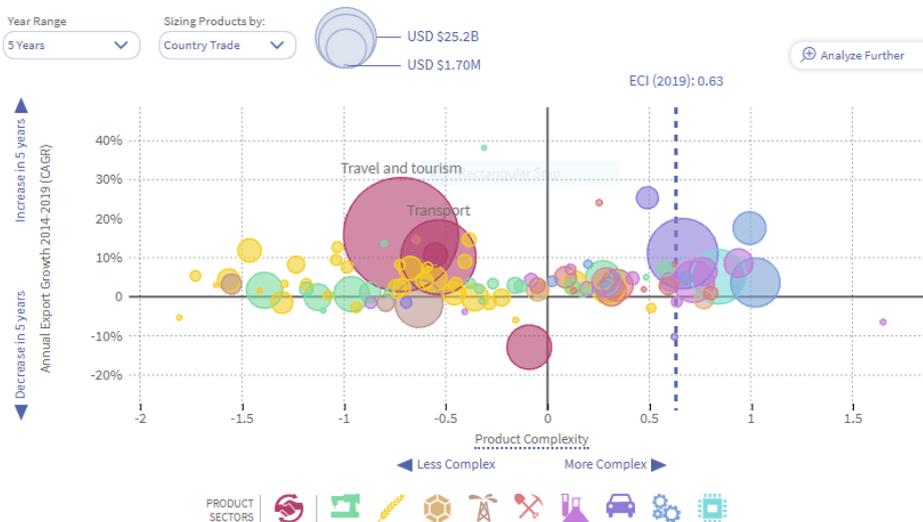
EXPORT TRADE FLOWS - 2019



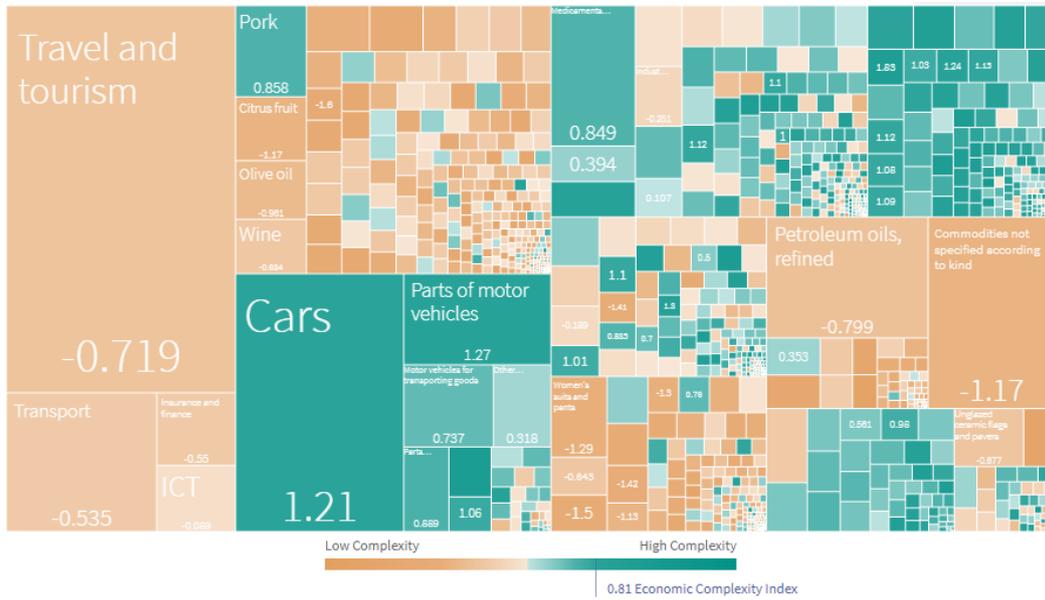
EXPORT COMPLEXITY IN 2019



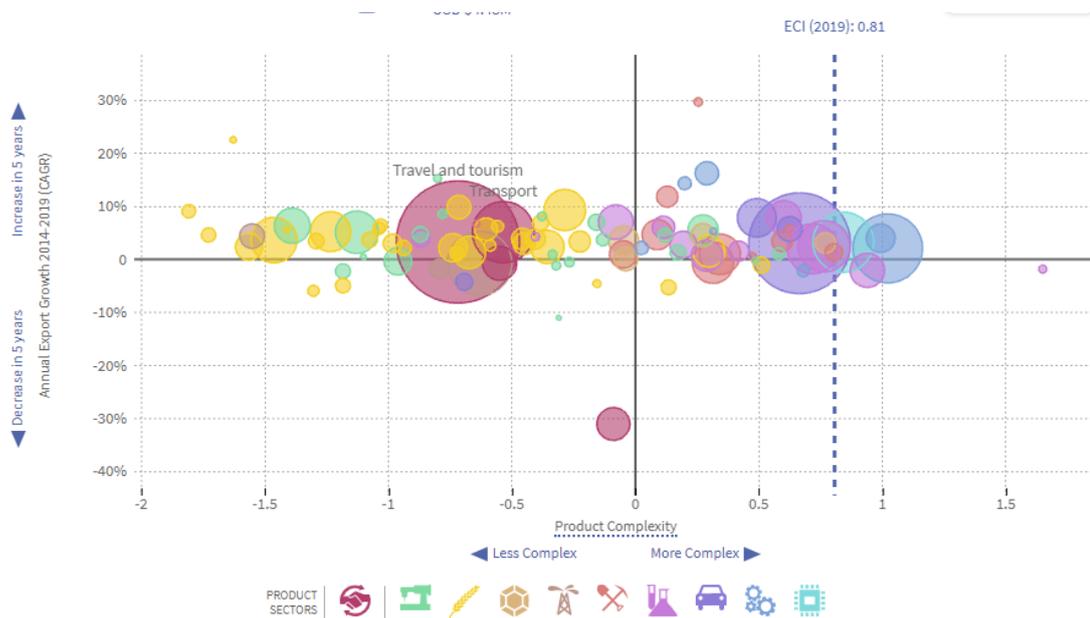
EXPORT GROWTH DYNAMICS



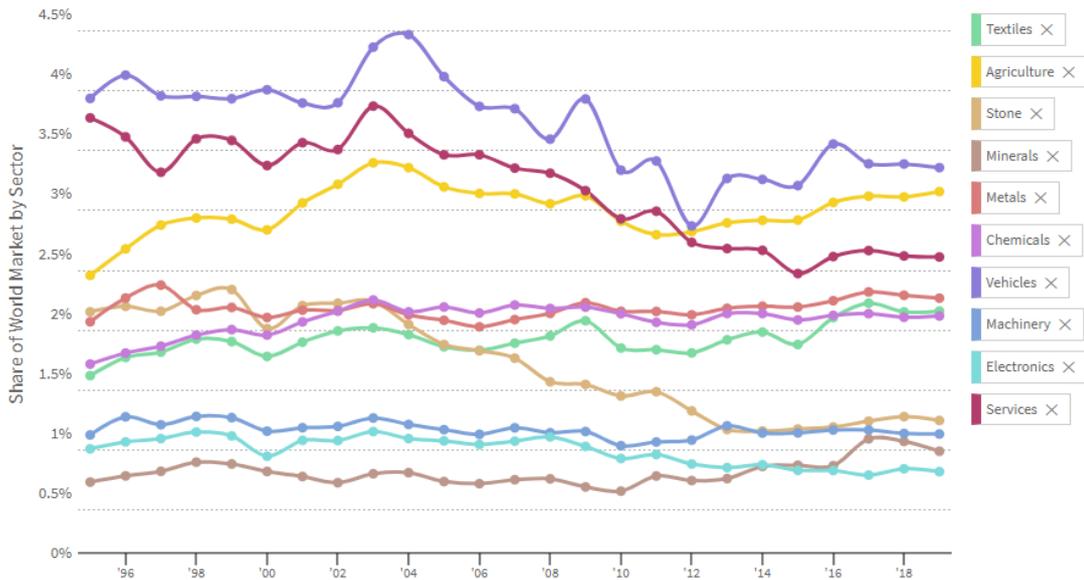
EXPORT COMPLEXITY IN 2019



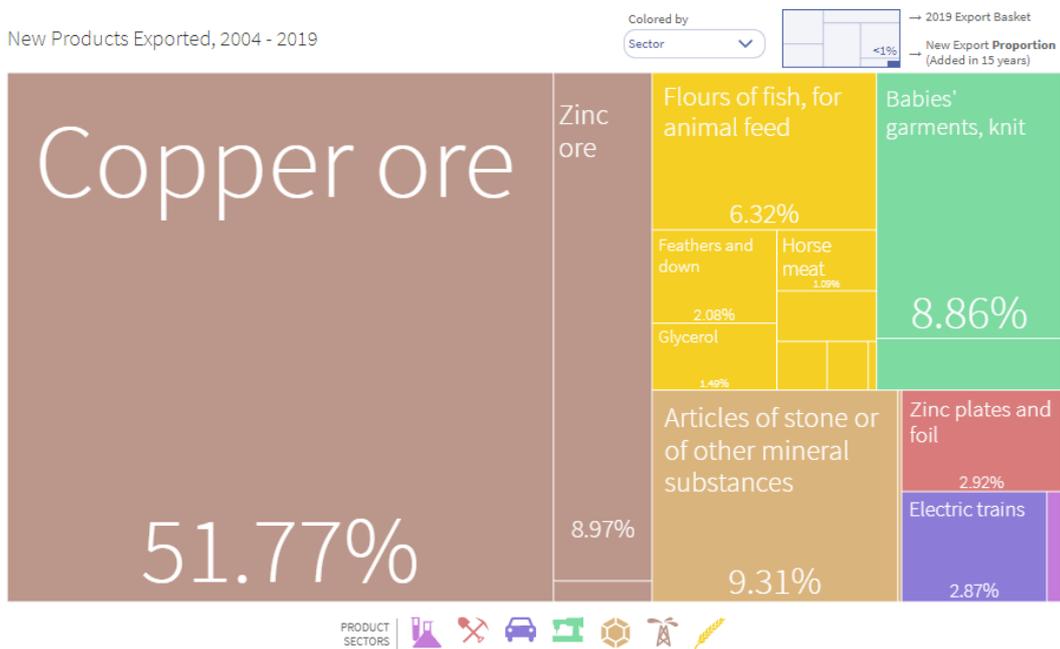
EXPORT GROWTH DYNAMICS IN 2019



GROWTH IN GLOBAL MARKET SHARE



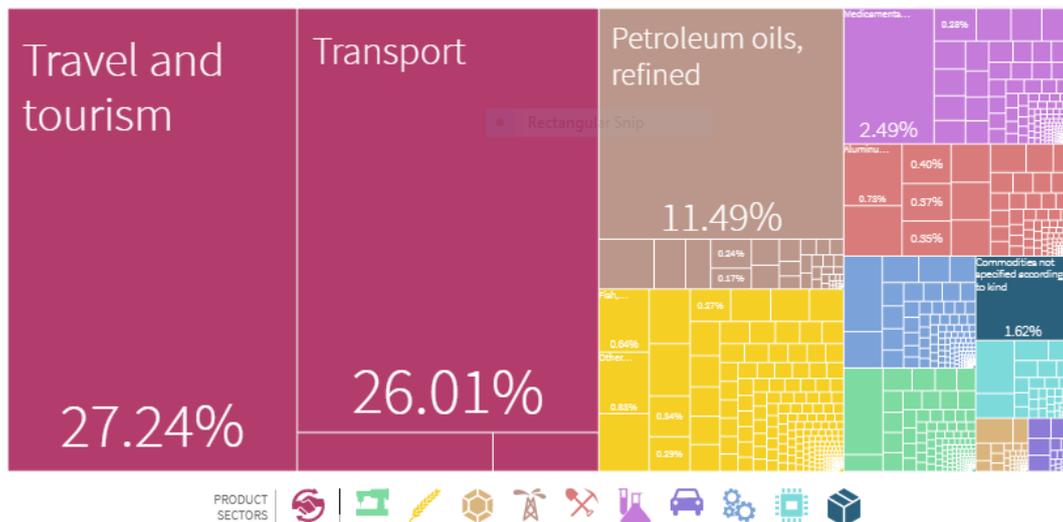
DIVERSIFICATION INTO NEW PRODUCTS



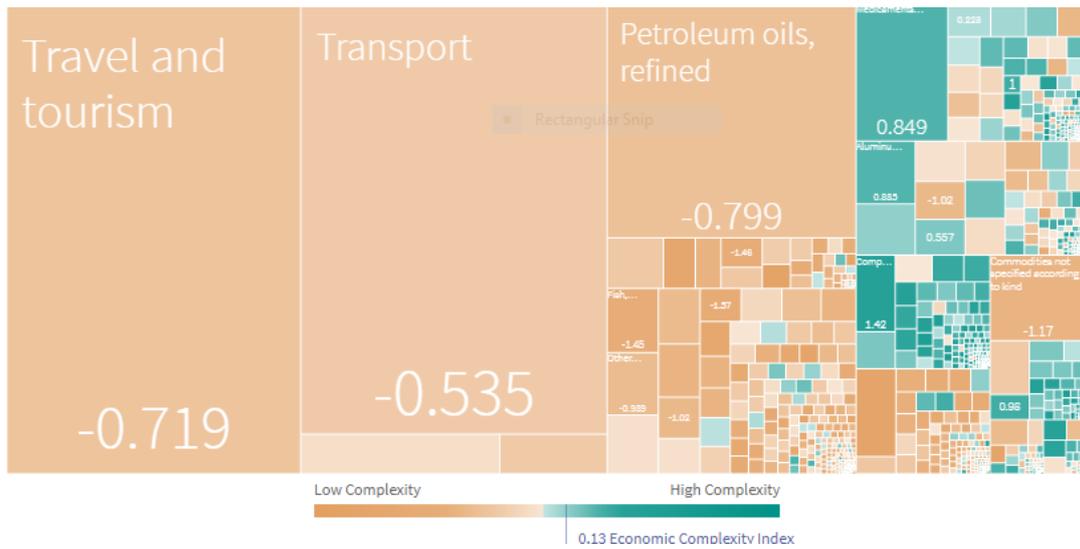
GRÉCIA | POSIÇÃO 50



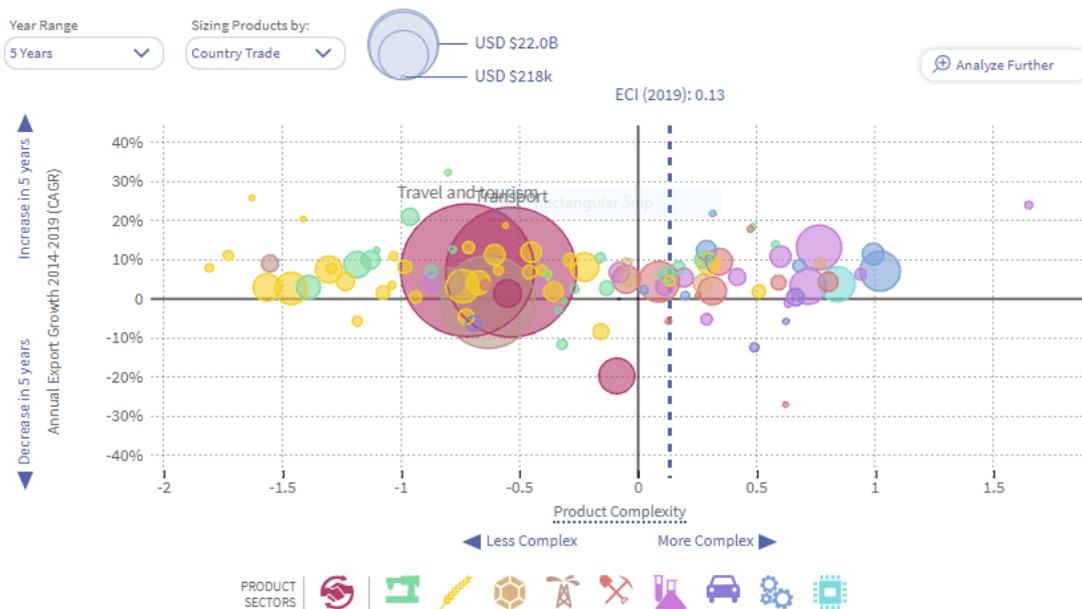
EXPORT BASKET -2019



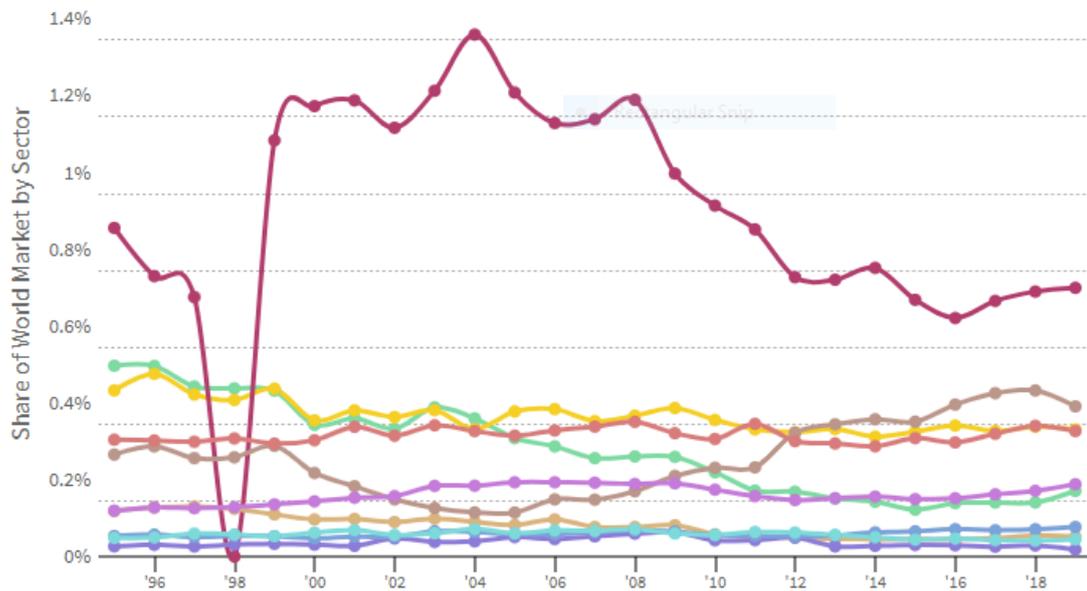
EXPORT COMPLEXITY



EXPORT GROWTH DYNAMICS



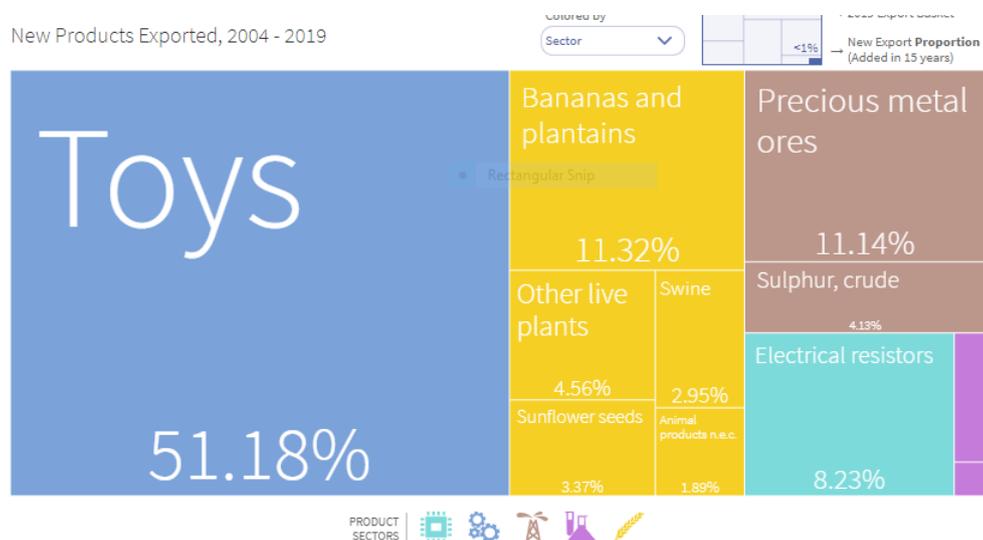
GROWTH IN GLOBAL MARKET SHARE



Greece has started the **process of structural transformation**. A key source of economic growth, this process reallocates economic activity from low to high productivity sectors. It broadly moves activities out of agriculture into textiles, followed by electronics and/or machinery manufacturing. While Greece has a presence in textile exports, its global market share in electronics has stagnated over the previous decade.

Greece's export dynamic in the past five years has been driven by Services. Worryingly, exports in Services have fallen. As a result, economic growth in Greece has been hindered by concentrating in a declining sector of global exports.

DIVERSIFICATION ON NEW PRODUCTS



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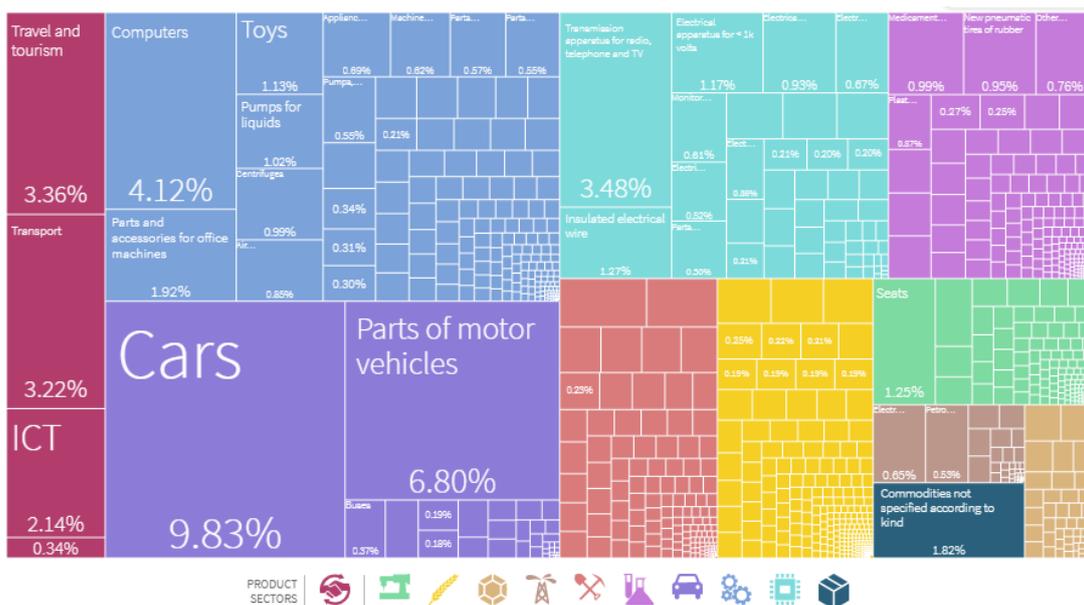


PAÍSES DA EUROPA CENTRAL (ESPAÇO “AUSTRO HUNGARO”)

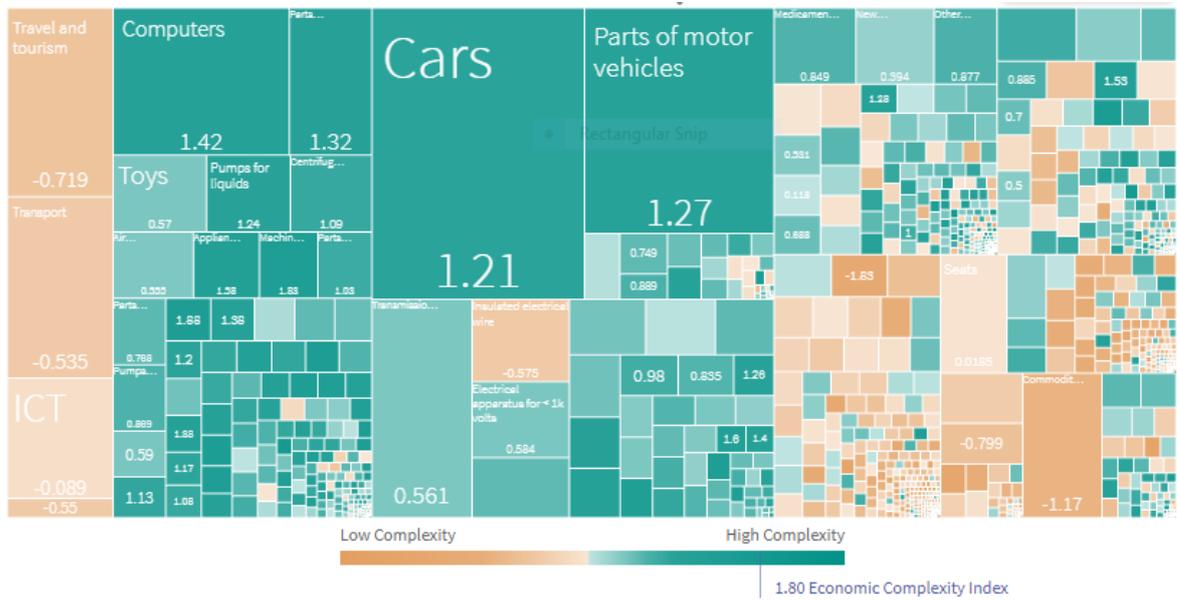
REPÚBLICA CHECA | POSIÇÃO 6



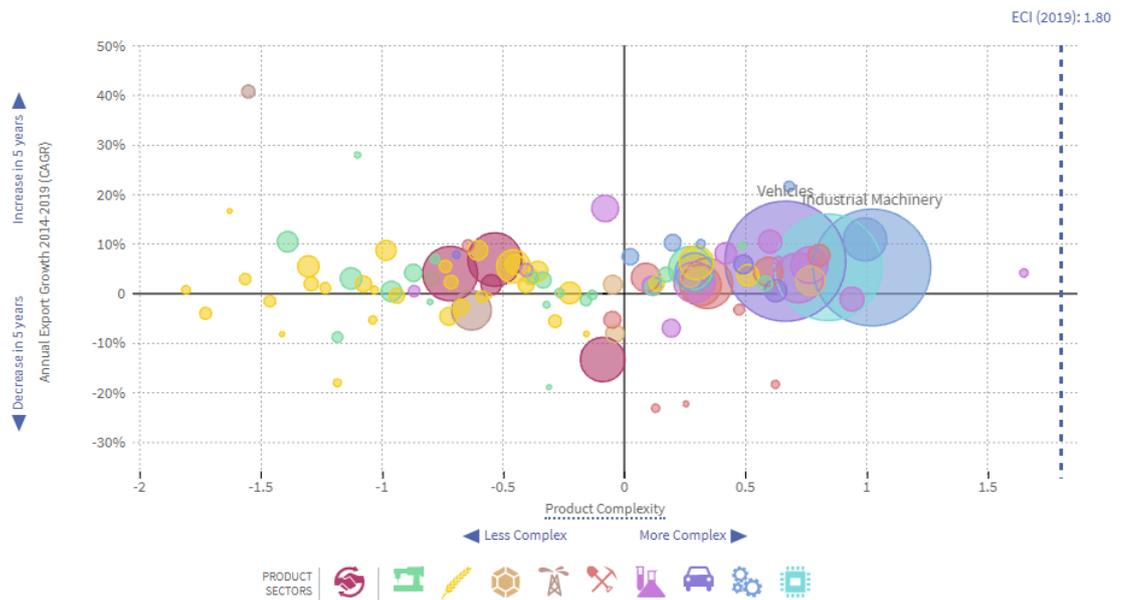
EXPORTS - TRADE FLOW (GROSS) IN 2019



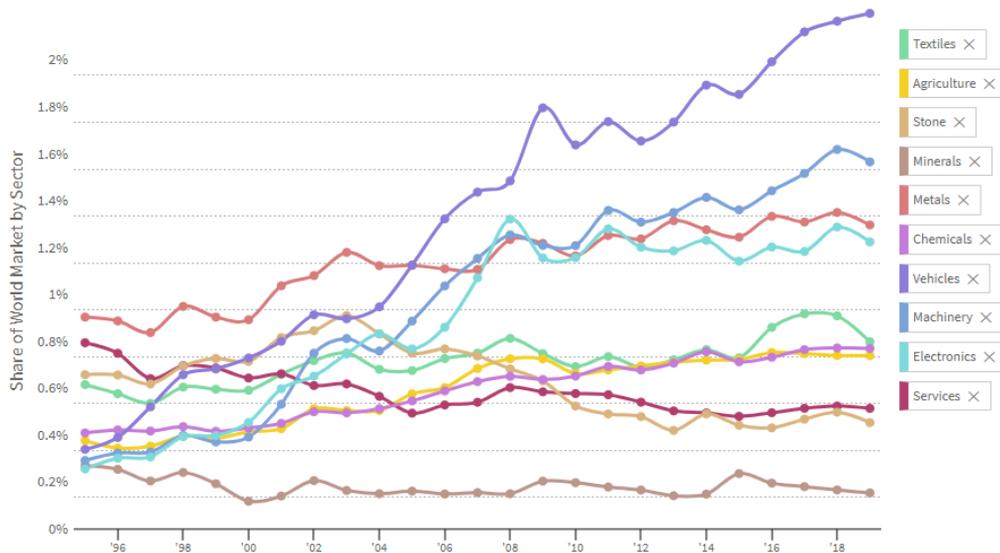
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS IN 2019



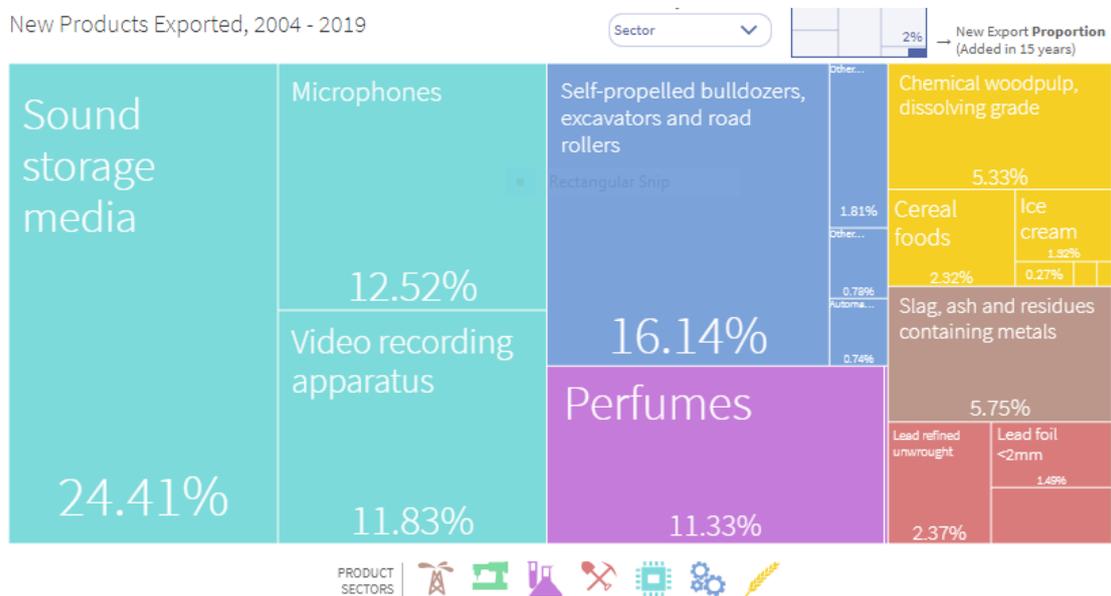
GROWTH IN GLOBAL MARKET SHARE



Czechia's export growth in the past five years has been driven by Vehicles. Czechia's growth in Vehicles has not been by good luck, by simply concentrating in a growing global sector. Rather, export growth in Vehicles has been driven by expanding its global market share.

DIVERSIFICATION INTO NEW PRODUCTS

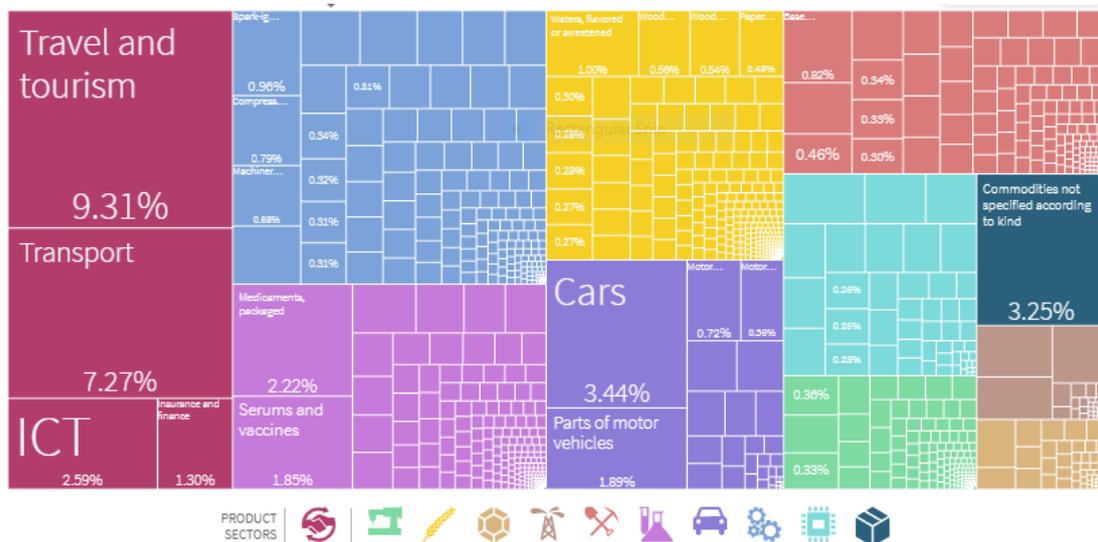
New Products Exported, 2004 - 2019



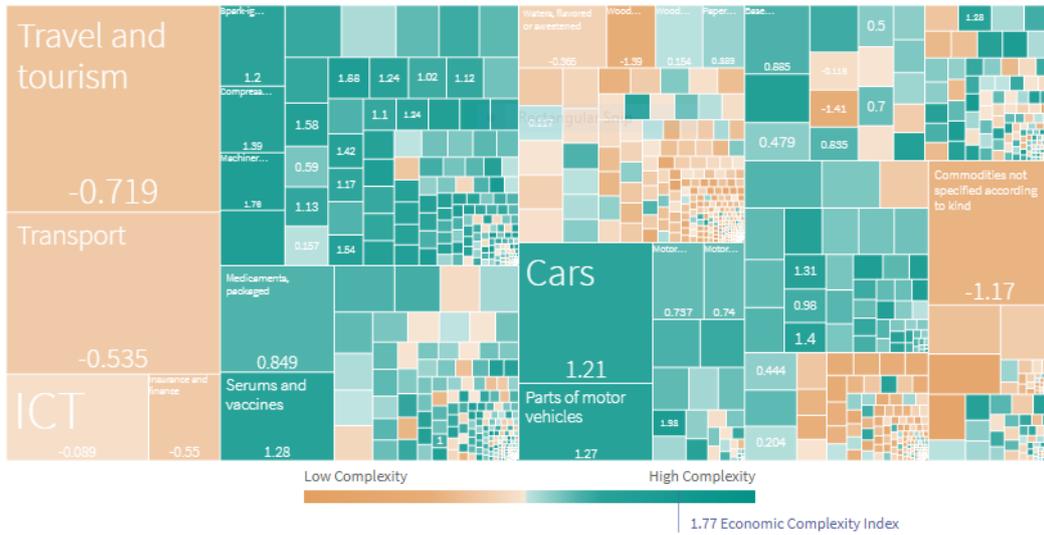
ÁUSTRIA | POSIÇÃO 7



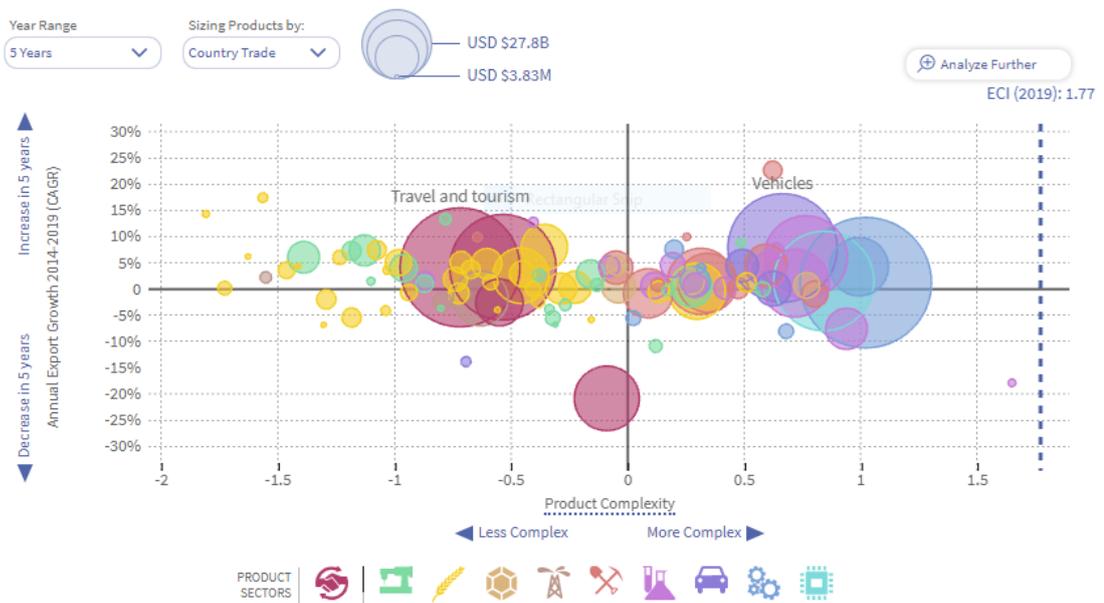
EXPORT BASKET IN 2019



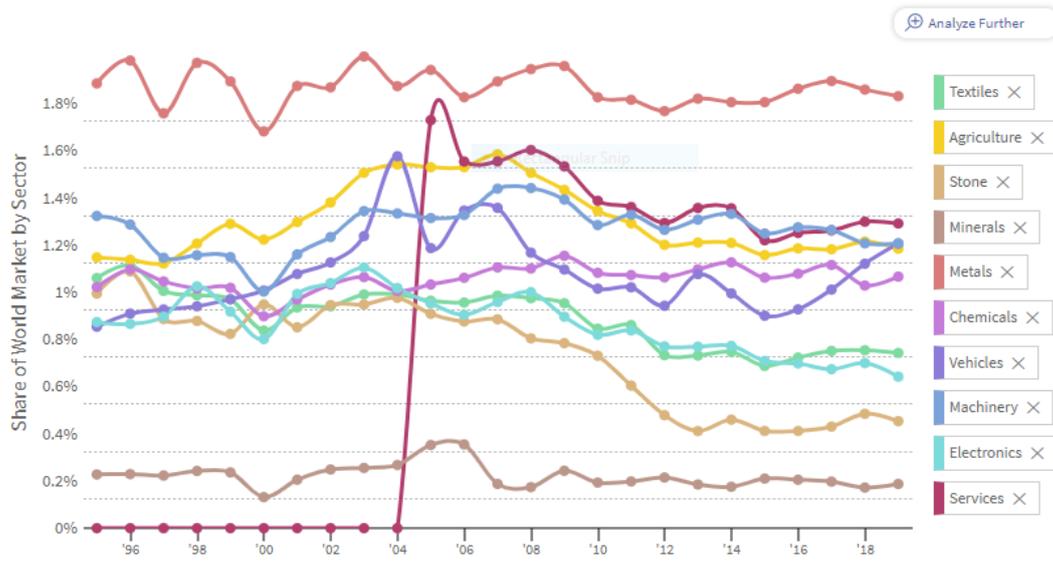
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS



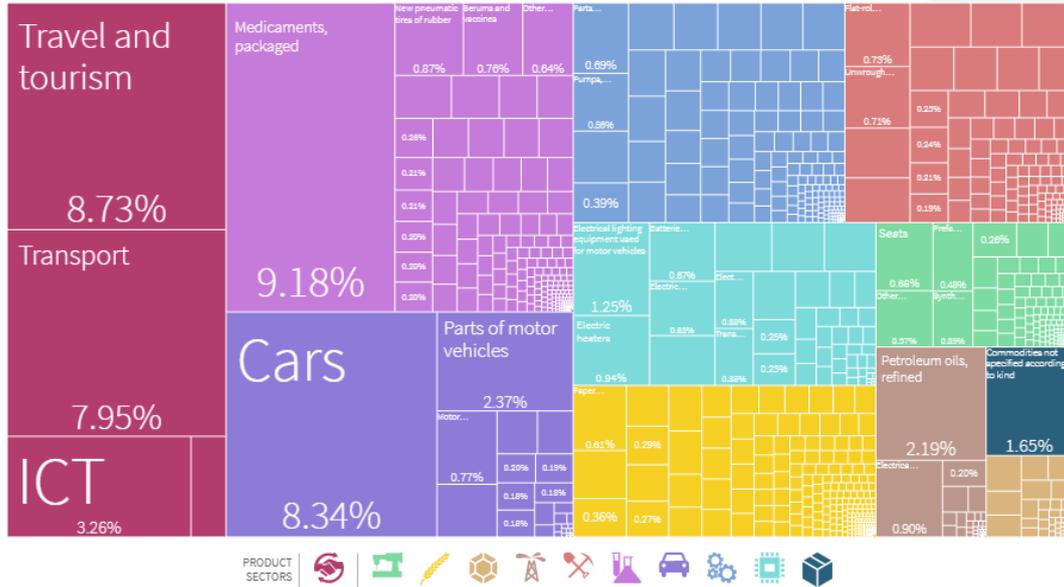
GROWTH IN GLOBAL MARKET SHARE



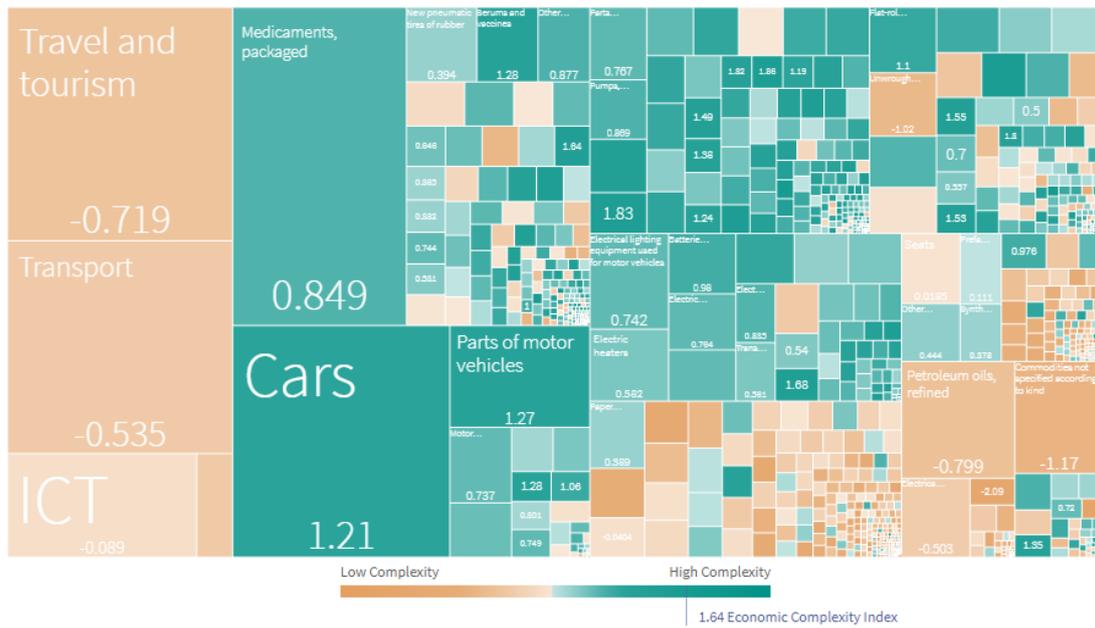
ESLOVÉNIA | POSIÇÃO 9



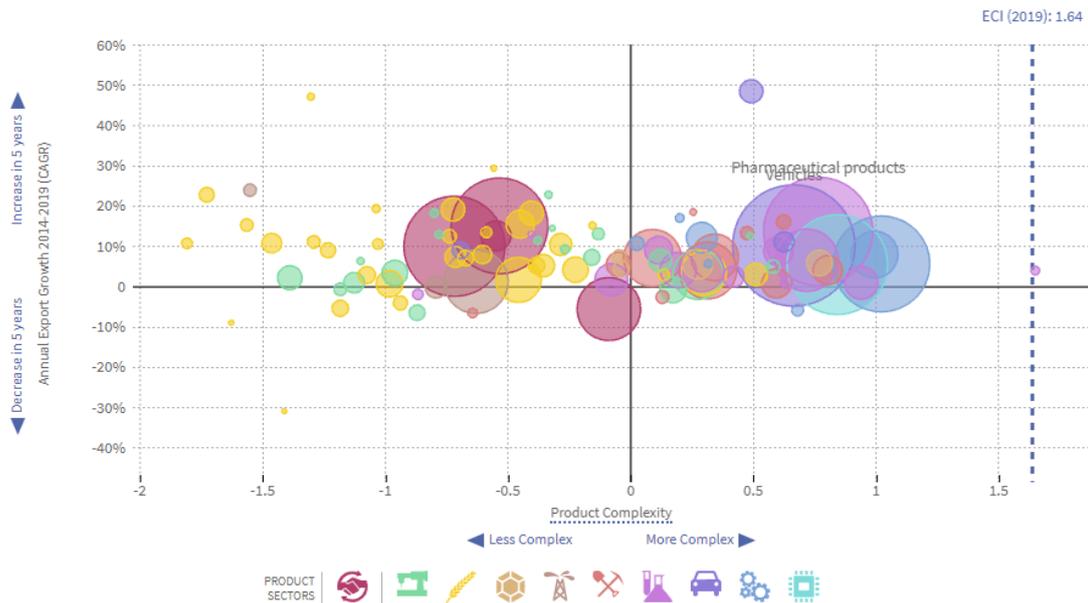
EXPORTS - TRADE FLOW (GROSS) IN 2019



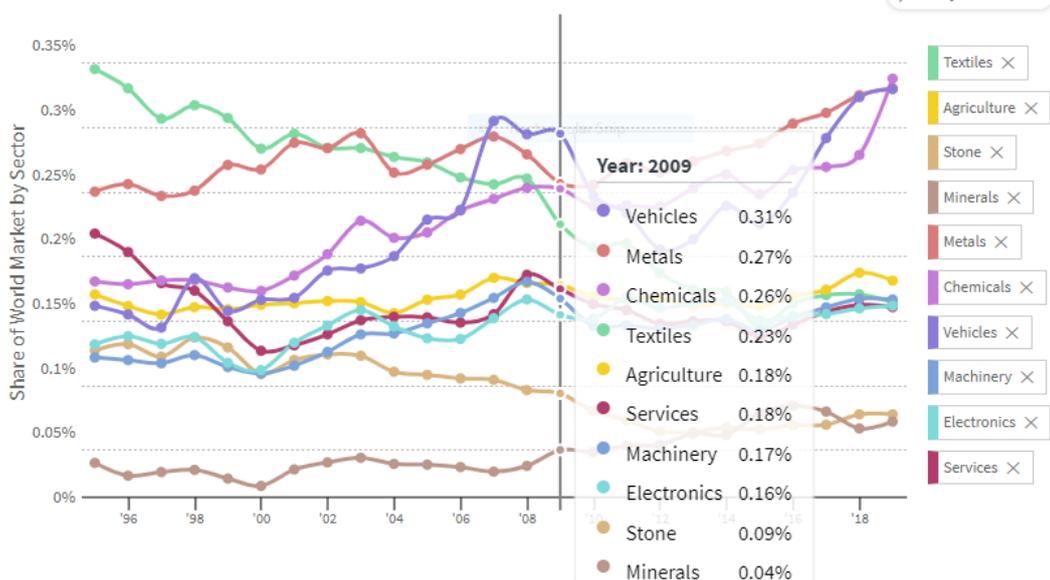
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS IN 2019



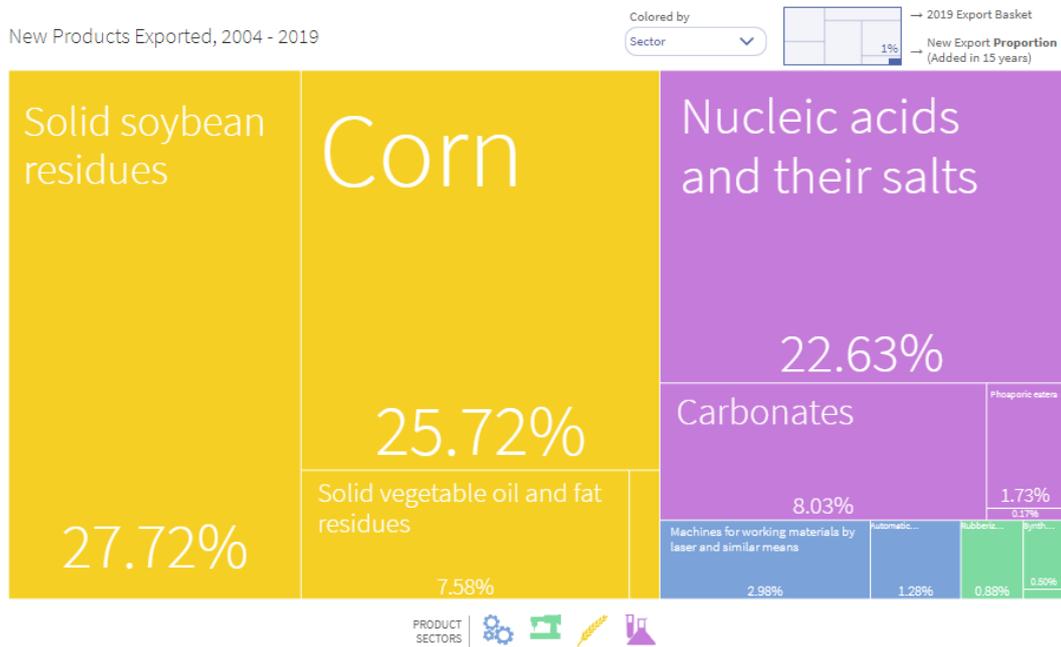
GROWTH IN GLOBAL MARKET SHARE



Global market share in machinery manufacturing, in Slovenia has risen over the previous decade.

Slovenia's export growth in the past five years has been driven by Chemicals. Slovenia's growth in Chemicals has not been by good luck, by simply concentrating in a growing global sector. Rather, export growth in Chemicals has been driven by expanding its global market share.

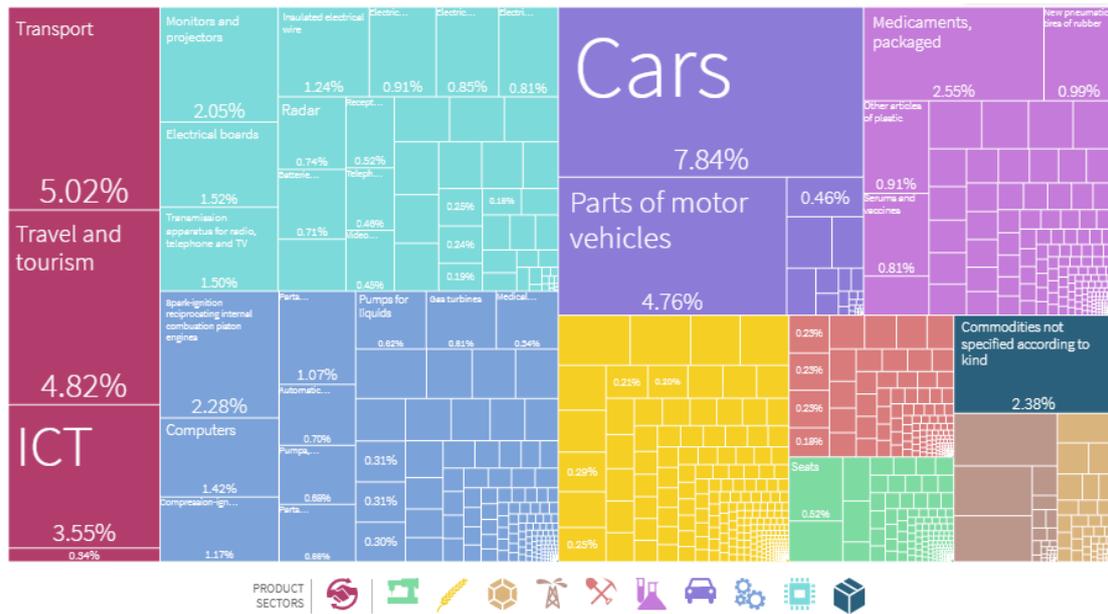
DIVERSIFICATION INTO NEW PRODUCTS



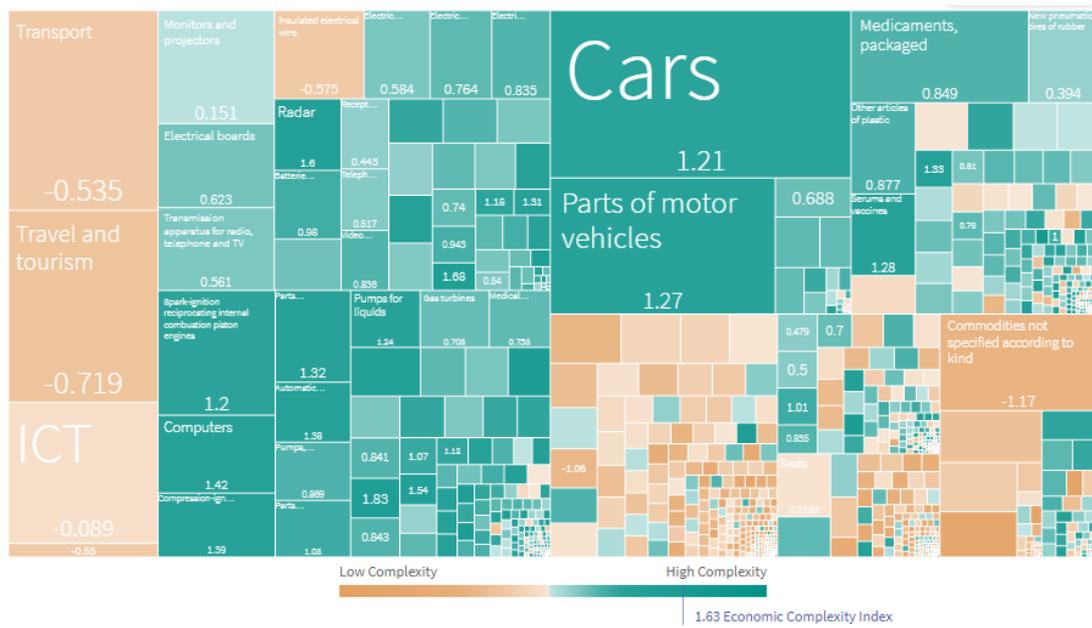
HUNGRIA | POSIÇÃO 10



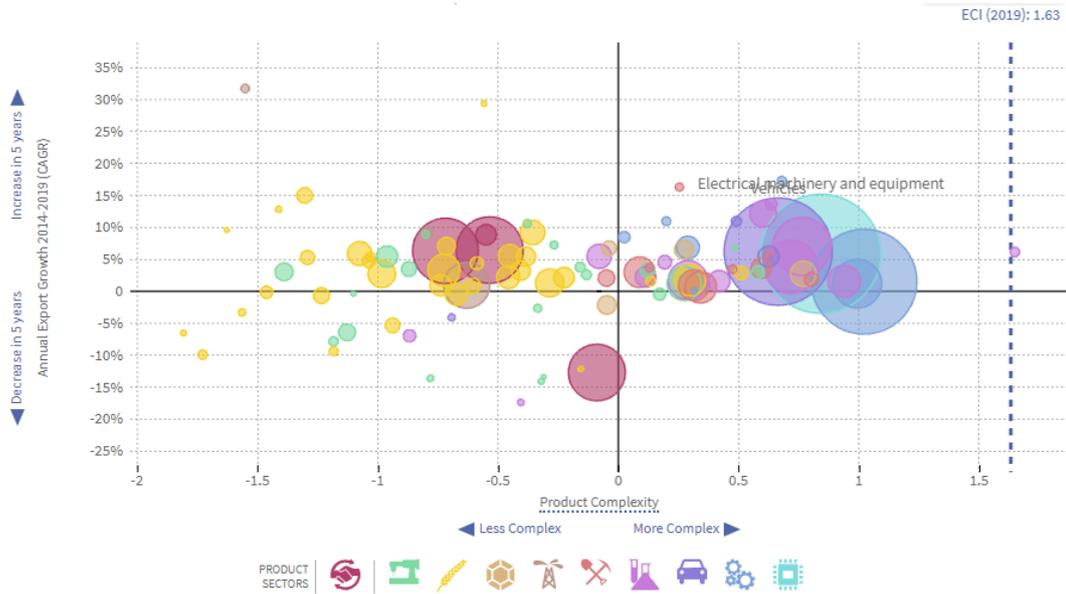
EXPORTS - TRADE FLOW (GROSS) IN 2019



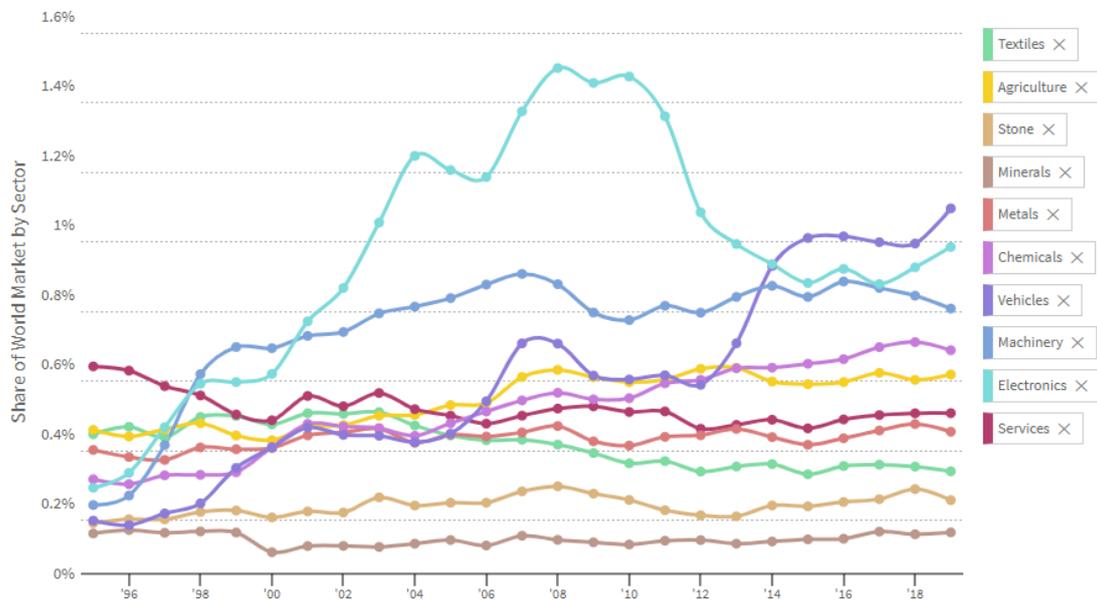
EXPORT COMPLEXITY IN 2019



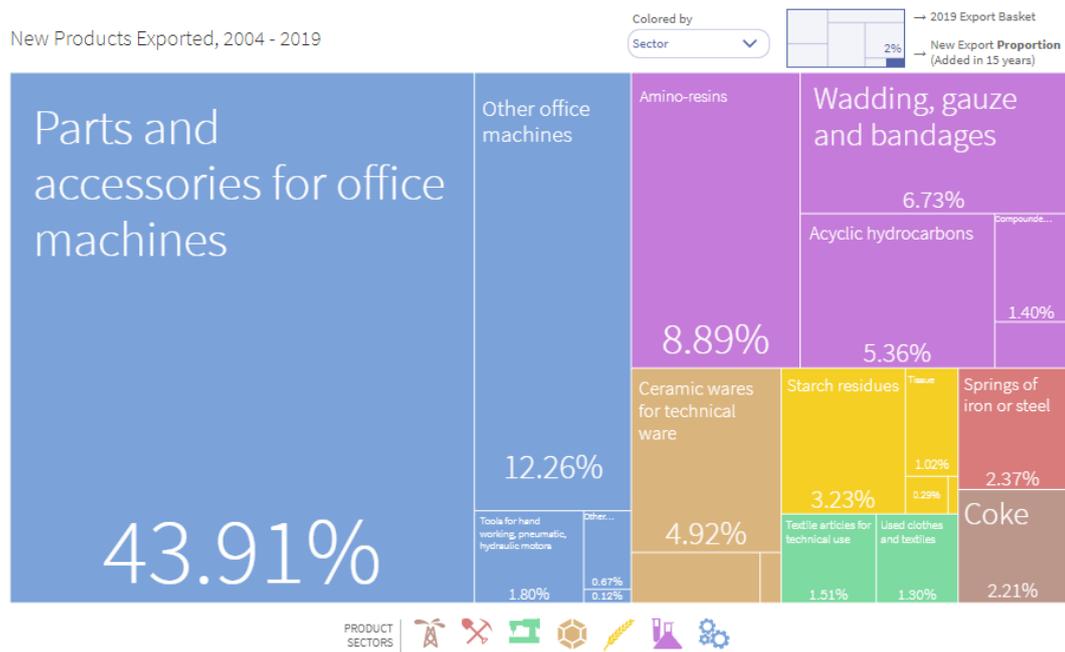
EXPORT GROWTH DYNAMICS IN 2019



GROWTH IN GLOBAL MARKET SHARE



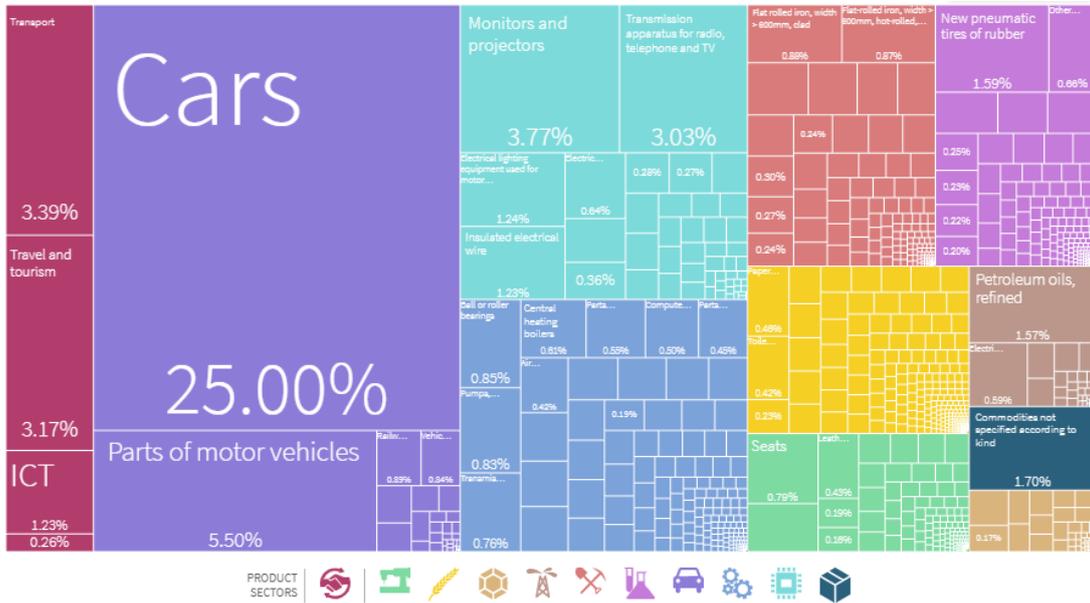
DIVERSIFICATION INTO NEW PRODUCTS



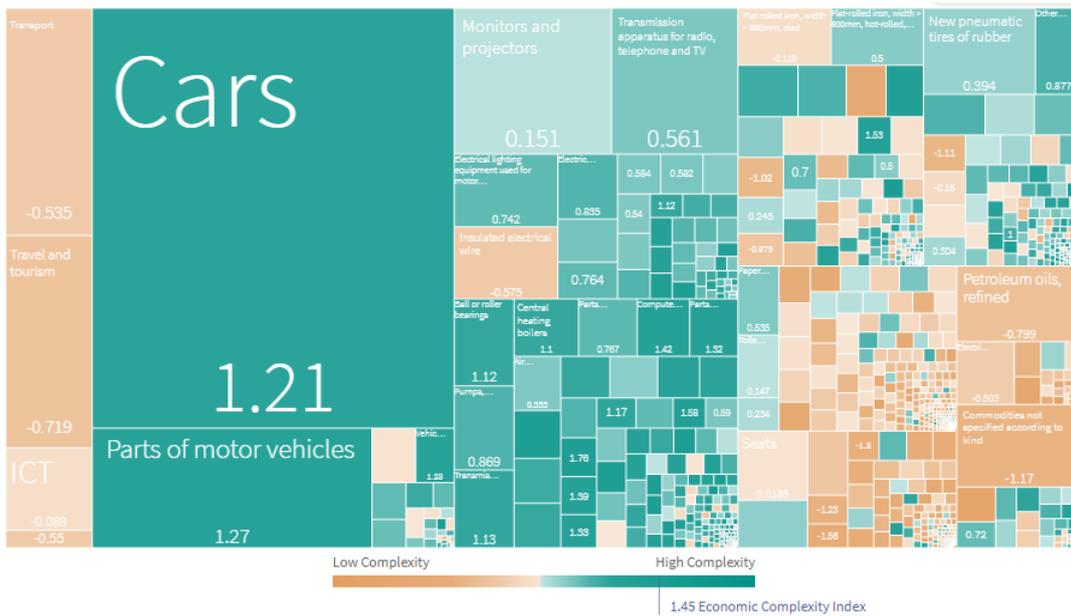
ESLOVÁQUIA | POSIÇÃO 14



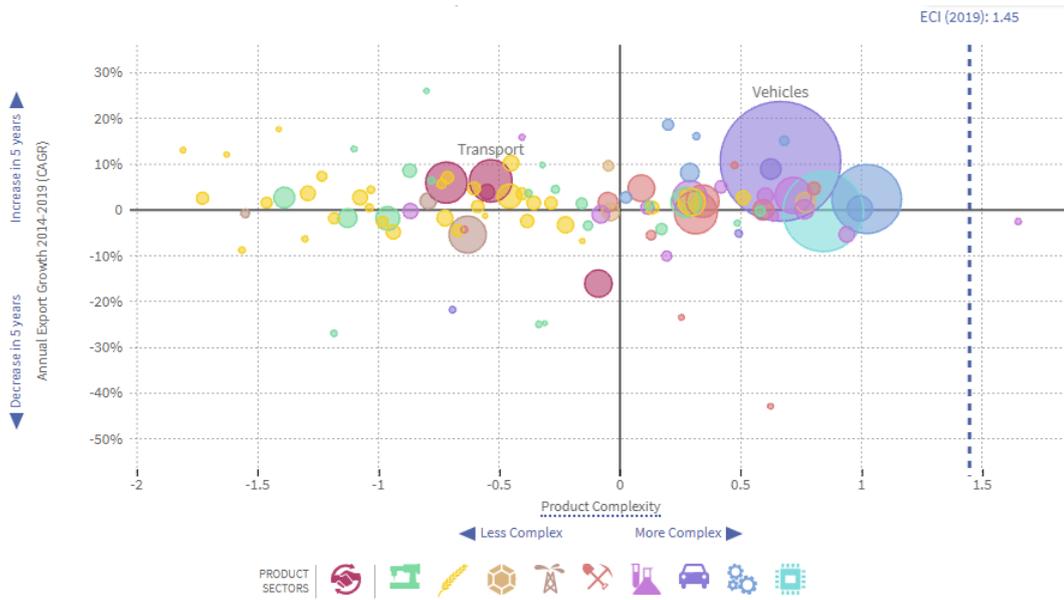
EXPORTS - TRADE FLOW (GROSS) IN 2019



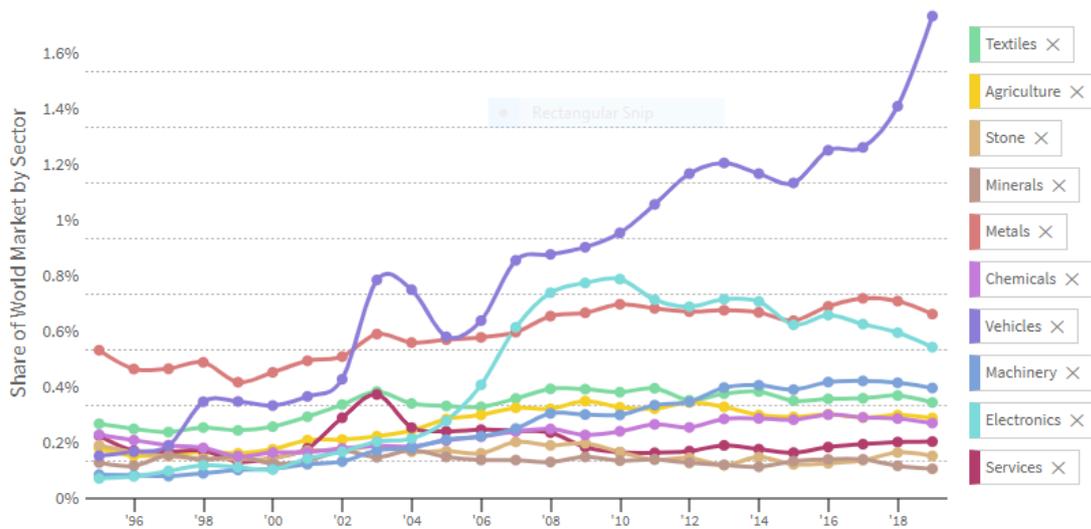
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS IN 2019

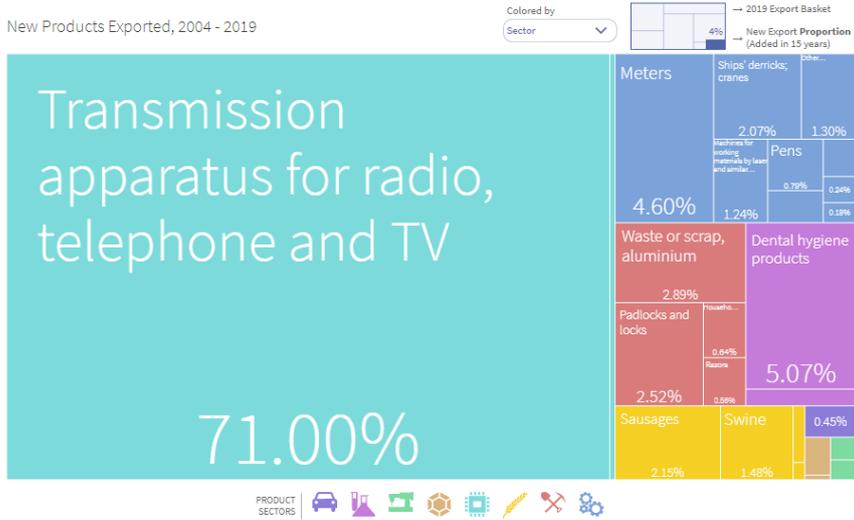


GROWTH IN GLOBAL MARKET SHARES



DIVERSIFICATION INTO NEW PRODUCTS

New Products Exported, 2004 - 2019



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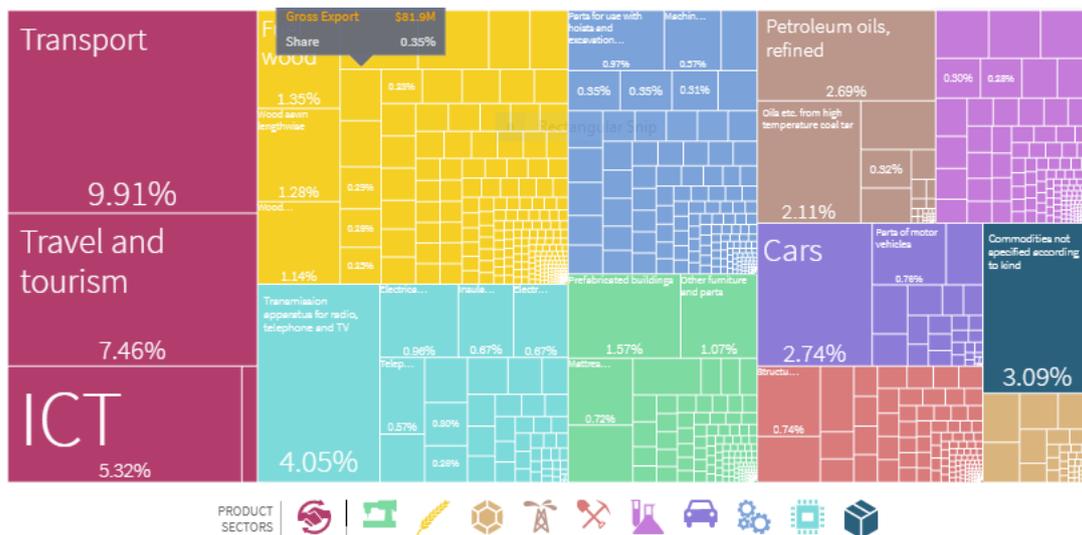


PAISES BÁLTICOS

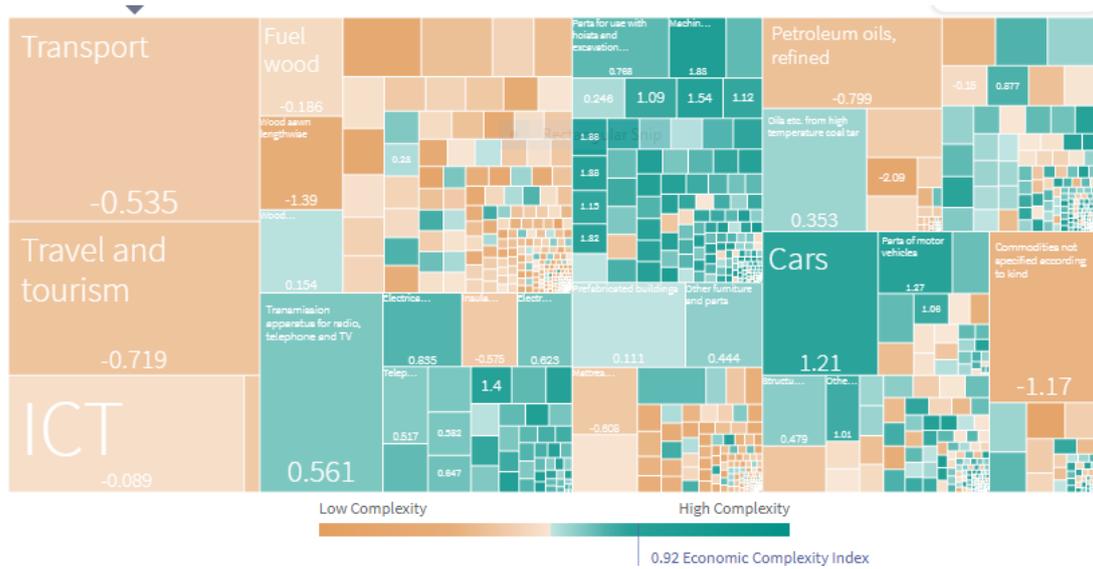
ESTÓNIA | POSIÇÃO 29



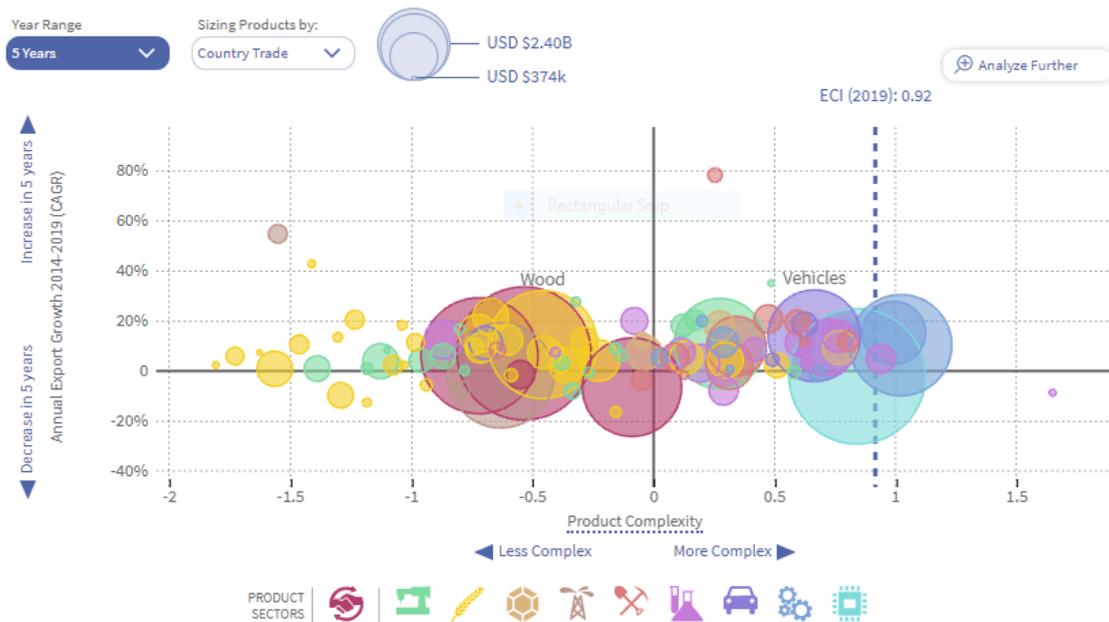
EXPORT BASKET 2019



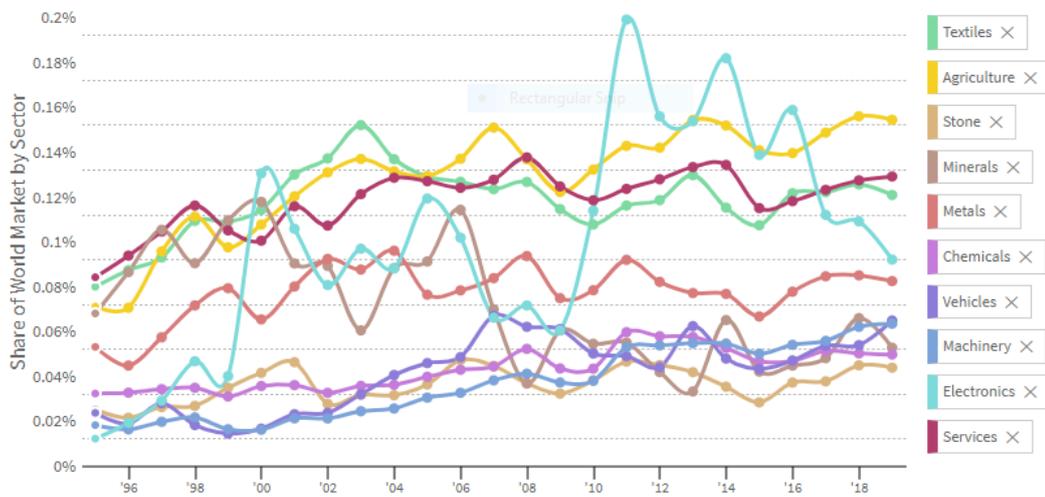
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS



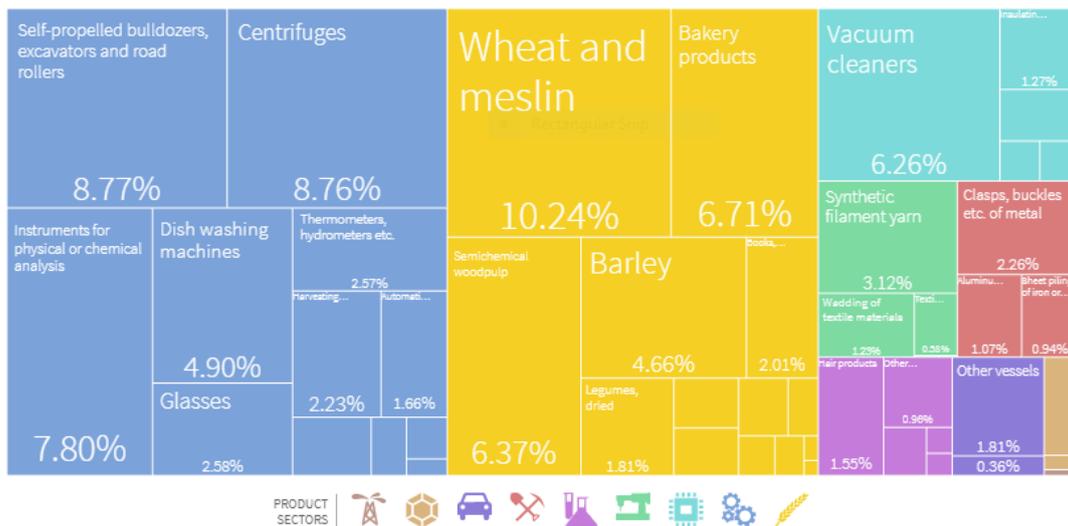
GROWTH IN GLOBAL MARKET SHARE



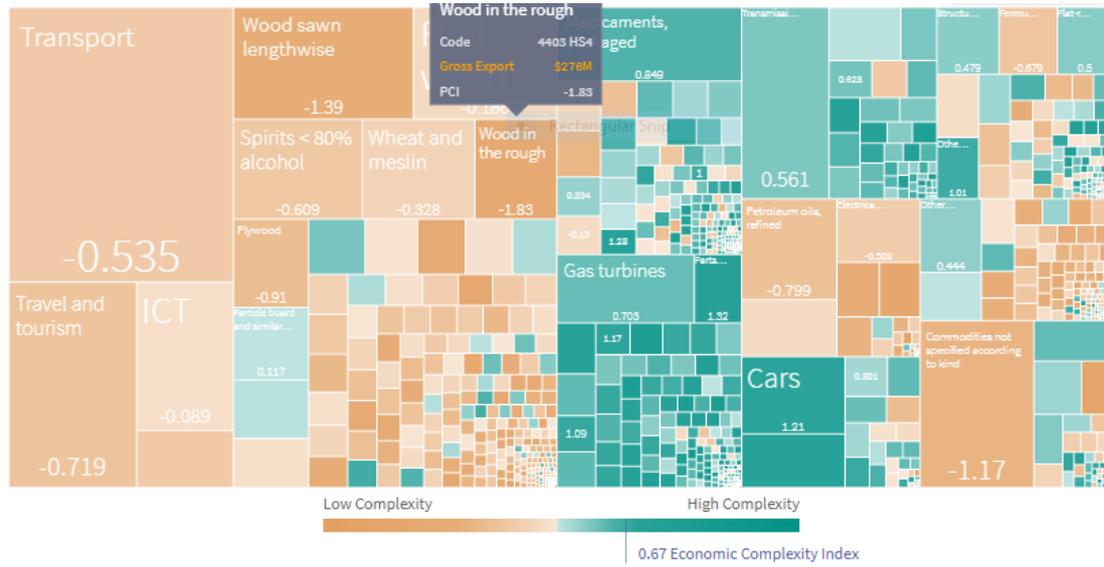
Global market share in machinery manufacturing, in Estonia has risen over the previous decade.

Estonia's export dynamic in the past five years has been driven by Electronics. Worryingly, exports in Electronics have fallen. As a result, economic growth in Estonia has been hindered by concentrating in a declining sector of global exports.

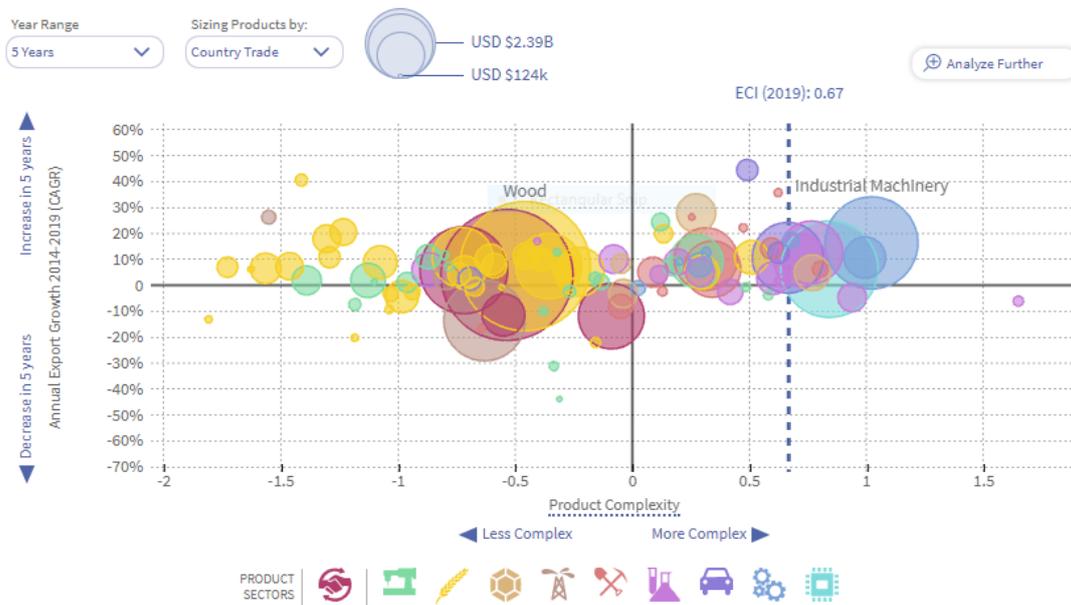
DIVERSIFICATION IN NEW PRODUCTS



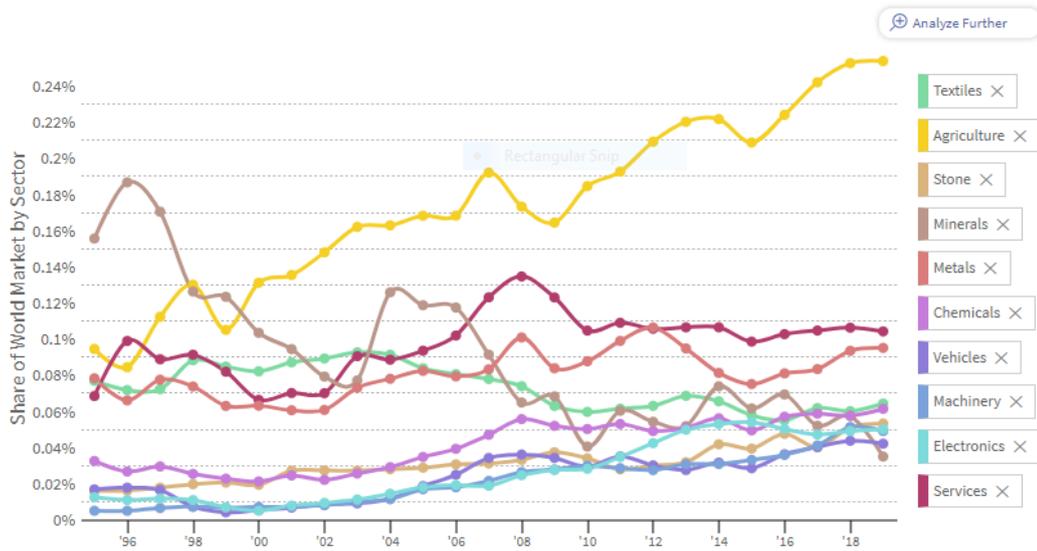
EXPORTS COMPLEXITY



EXPORT GROWTH DYNAMICS



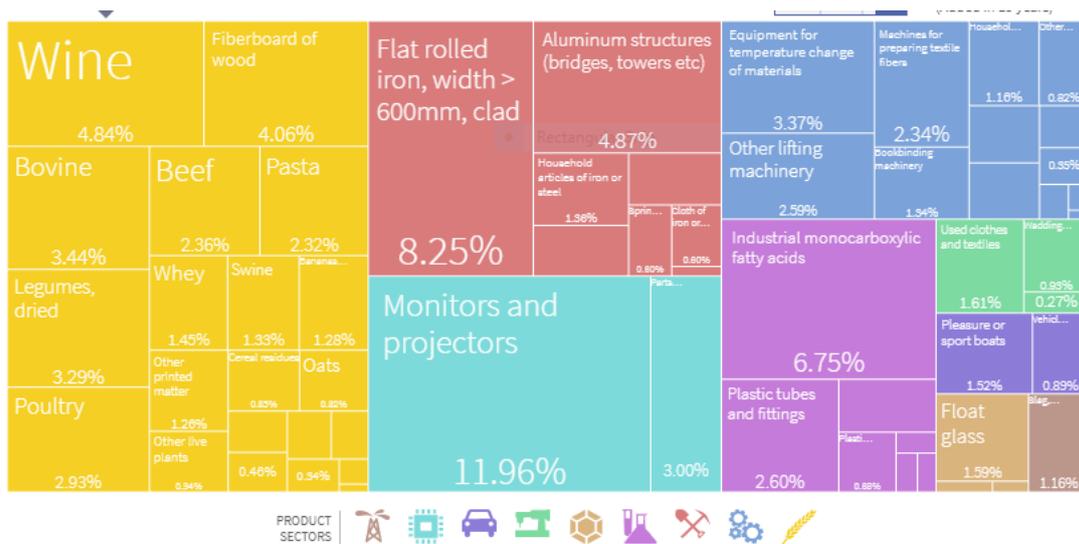
GROWTH IN GLOBAL MARKET SHARE



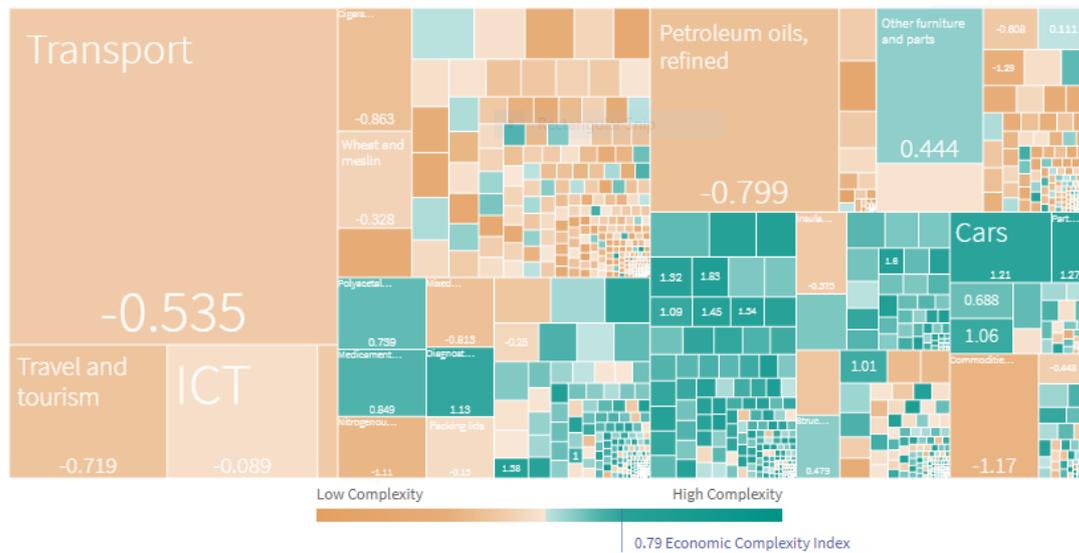
Global market share in machinery manufacturing, in Latvia, has risen over the previous decade.

Latvia's export dynamic in the past five years has been driven by Minerals. Worryingly, exports in Minerals have fallen. As a result, economic growth in Latvia has been hindered by concentrating in a declining sector of global exports.

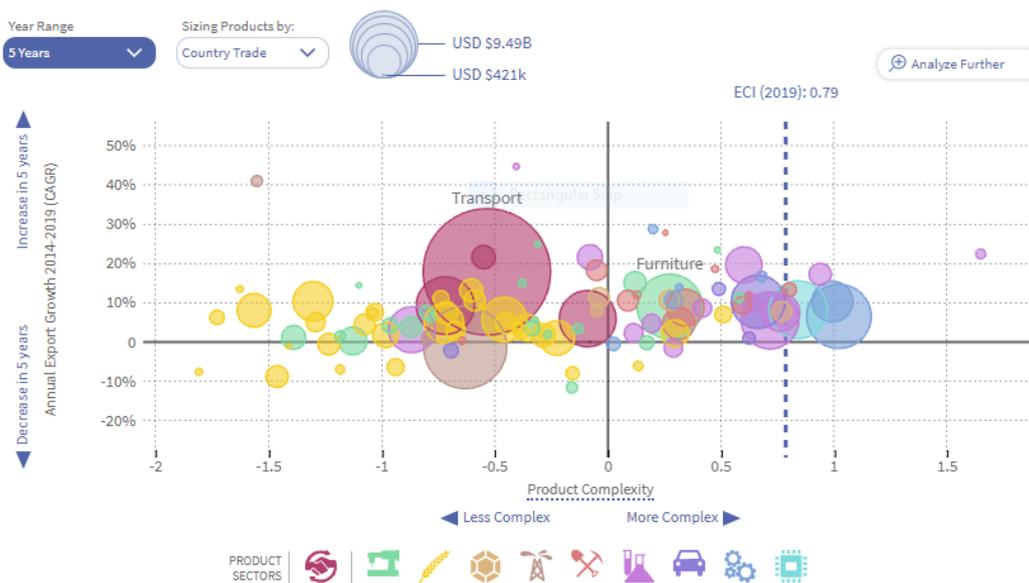
DIVERSIFICATION IN NEW PRODUCTS



EXPORT COMPLEXITY 2019



EXPORT GROWTH DYNAMICS



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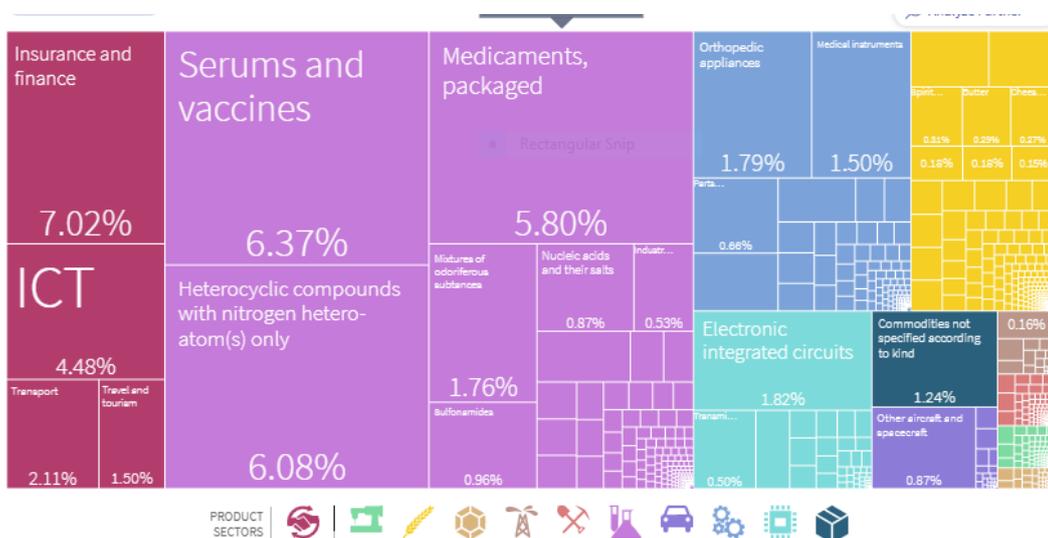


PAISES COM PRESENÇA EUROTILÂNTICA NO COMÉRCIO INTERNACIONAL

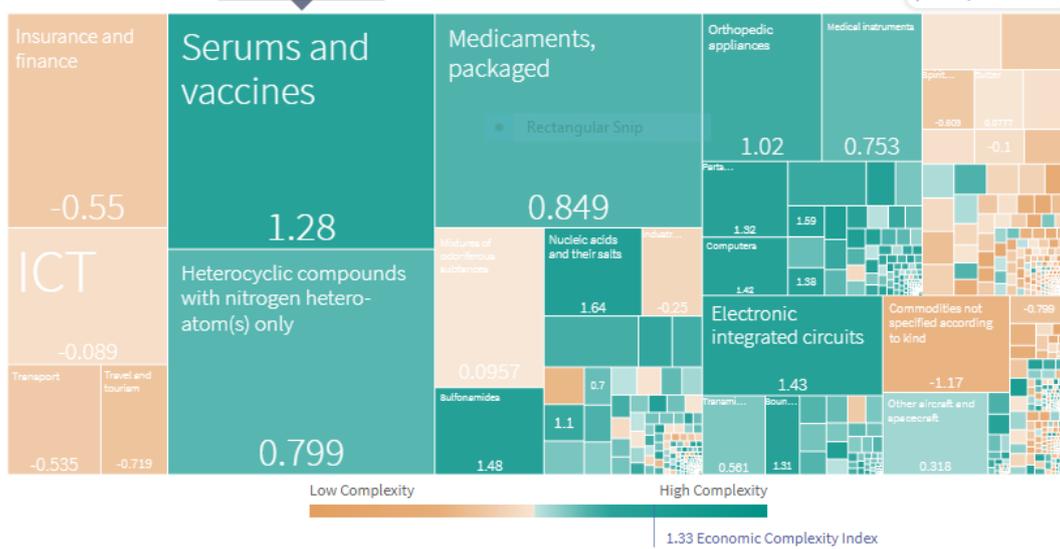
IRLANDA | POSIÇÃO 17



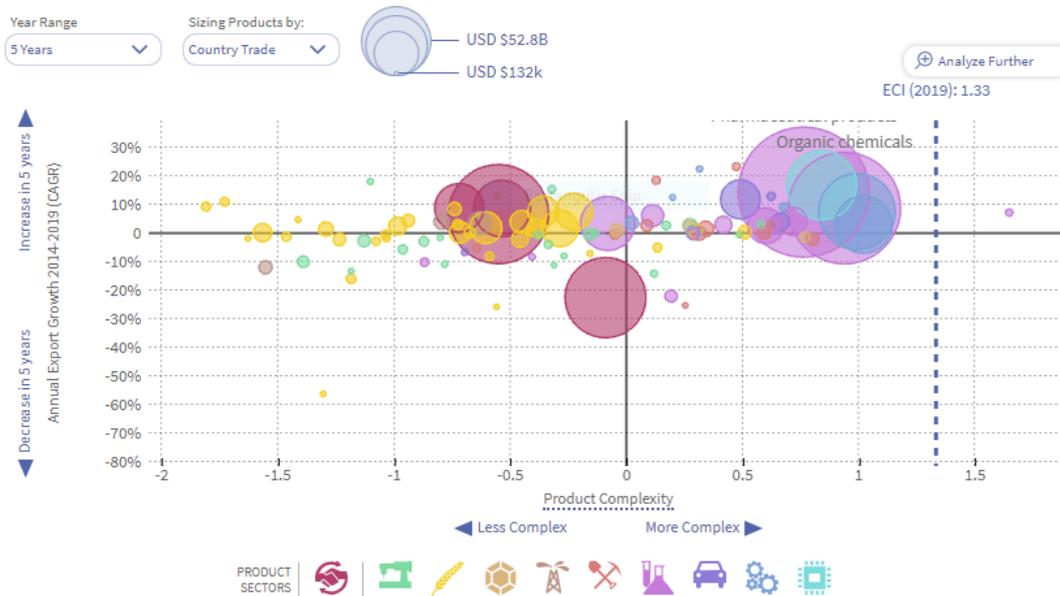
EXPORT MARKET IN 2019



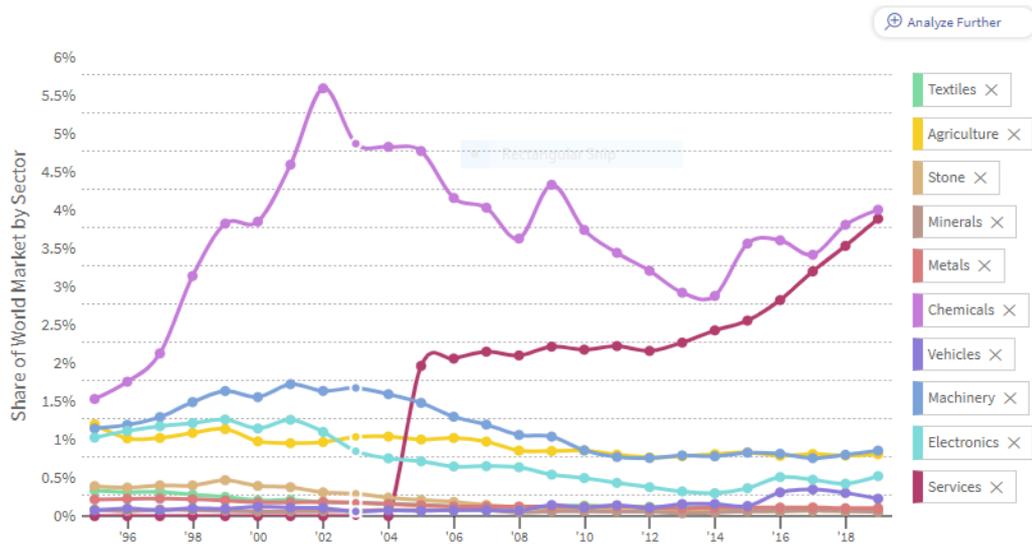
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS

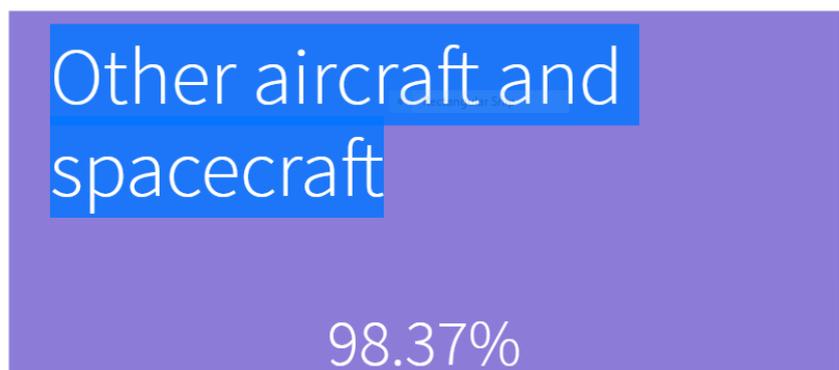


GROWTH IN GLOBAL MARKET SHARE



“Ireland has completed the process of structural transformation, having entered all major, high-productivity sectors. However, global market share in machinery manufacturing, in Ireland, has fallen over the previous decade. Ireland's export growth in the past five years has been driven by Services. Ireland's growth in Services has not been by good luck, by simply concentrating in a growing global sector. Rather, export growth in Services has been driven by expanding its global market share.”

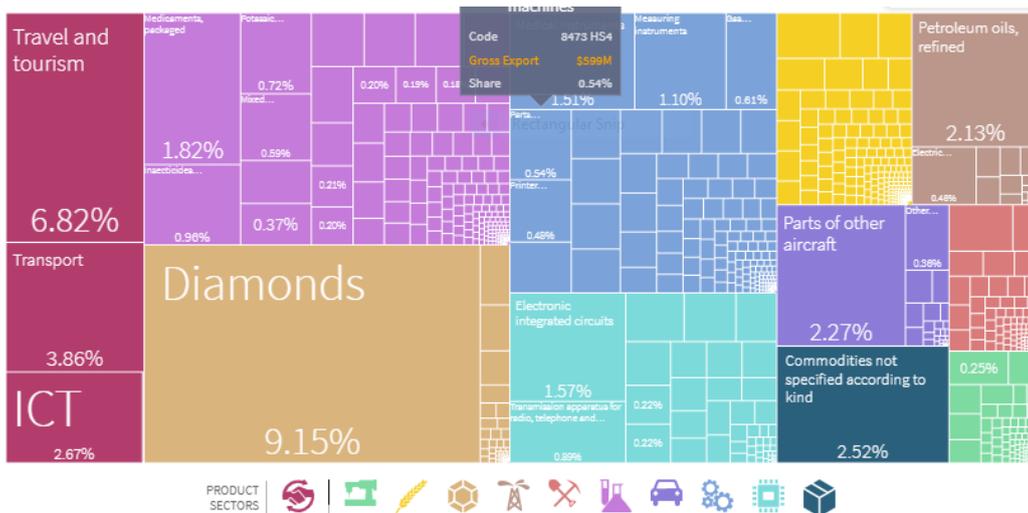
NEW PRODUCTS



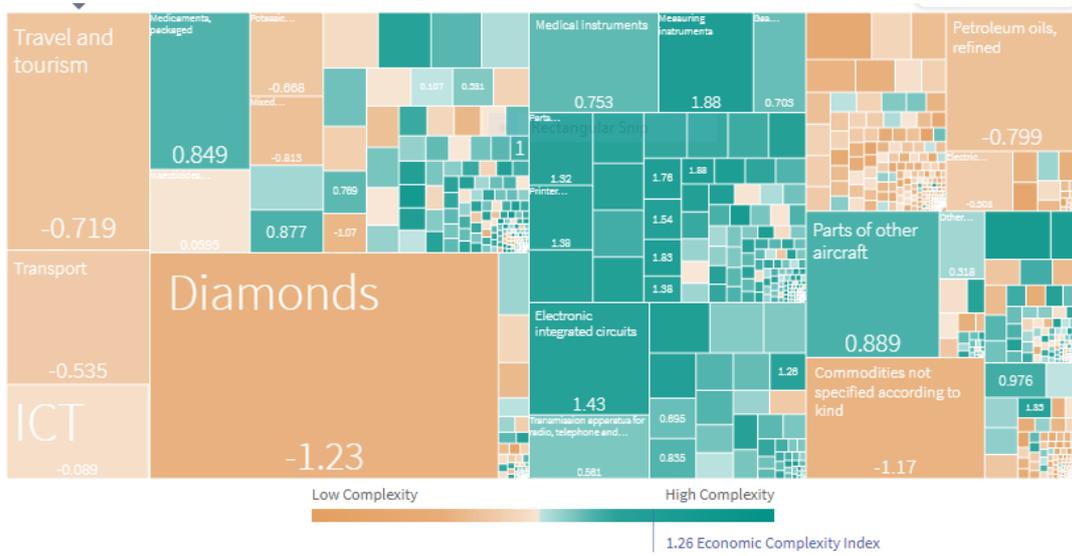
ISRAEL-POSIÇÃO 20



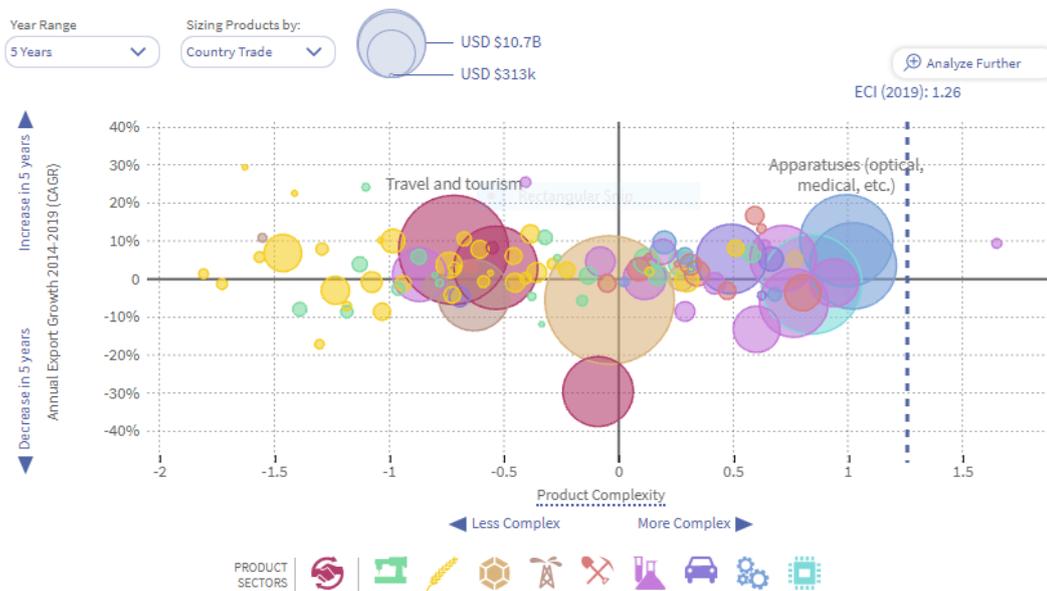
EXPORT BASKET 2019



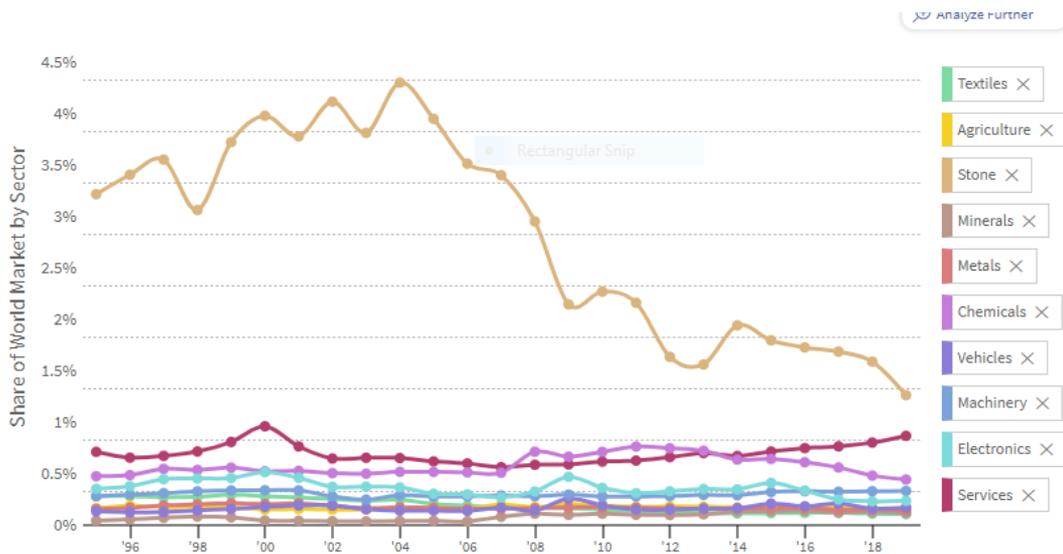
EXPORT COMPLEXITY IN 2019



EXPORT GROWTH DYNAMICS



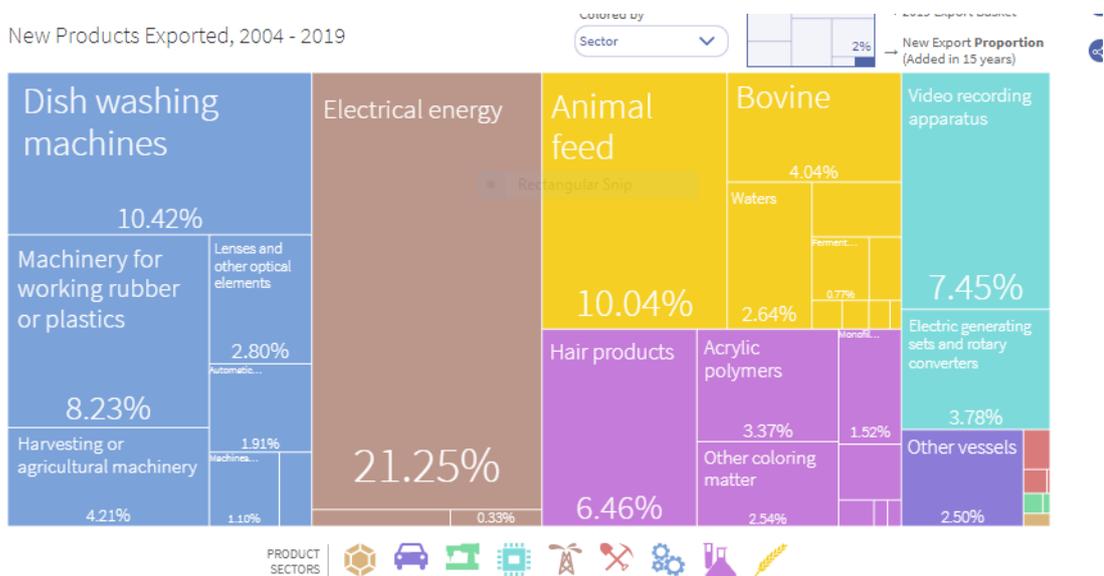
GROWTH IN GLOBAL MARKET SHARE



Israel has completed the process of structural transformation, having entered all major, high-productivity sectors. However, global market share in machinery manufacturing, in Israel, has stagnated over the previous decade.

Israel's export growth in the past five years has been driven by Services. Israel's growth in Services has not been by good luck, by simply concentrating in a growing global sector. Rather, export growth in Services has been driven by expanding its global market share.

NEW PRODUCTS



Países	Posição de 12 Países no ranking do Índice de complexidade Económica (total de 133 países)
República Checa	6
Áustria	7
Eslovénia	9
Hungria	10
Eslováquia	14
Irlanda	17
Israel	20
Estónia	29
Espanha	32
Lituânia	33
Letónia	37
Portugal	38
Grécia	50

- Como se pode ver Portugal ocupa nesta tabela o penúltimo lugar, apenas acima da Grécia e bem longe de países do grupo Austro Húngaro, do grupo dos países Bálticos e obviamente dos Países com uma presença euro-atlântica - Irlanda e Israel. O que aponta para um futuro crescimento limitado uma especialização internacional pouco alinhada com os segmentos que mais crescem na procura mundial e menos expostos estão à competição das economias em desenvolvimento-embora já comecem a ficar em competição com as economias emergentes e, sobretudo, com as economias desenvolvidas às quais Portugal pretende pertencer.



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