

Samband íslenskra sveitarfélaga

FJÁRMÁLARÁÐSTEFNA SVEITARFÉLAGA 13. – 14. OKTÓBER 2011

Gunnlaugur Júlíusson sviðsstjóri
Sambands íslenskra sveitarfélaga



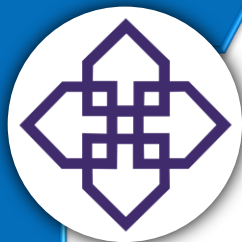
YFIRLIT ERINDIS

- Ytra rekstrarumhverfi sveitarfélaganna
- Afkoma og efnahagur sveitarfélaganna á árinu 2010 (A hluti sveitarsjóður)
- Þróun nokkurra atriða greind
- Niðurstöður þjóðhagsspár frá því í júlí

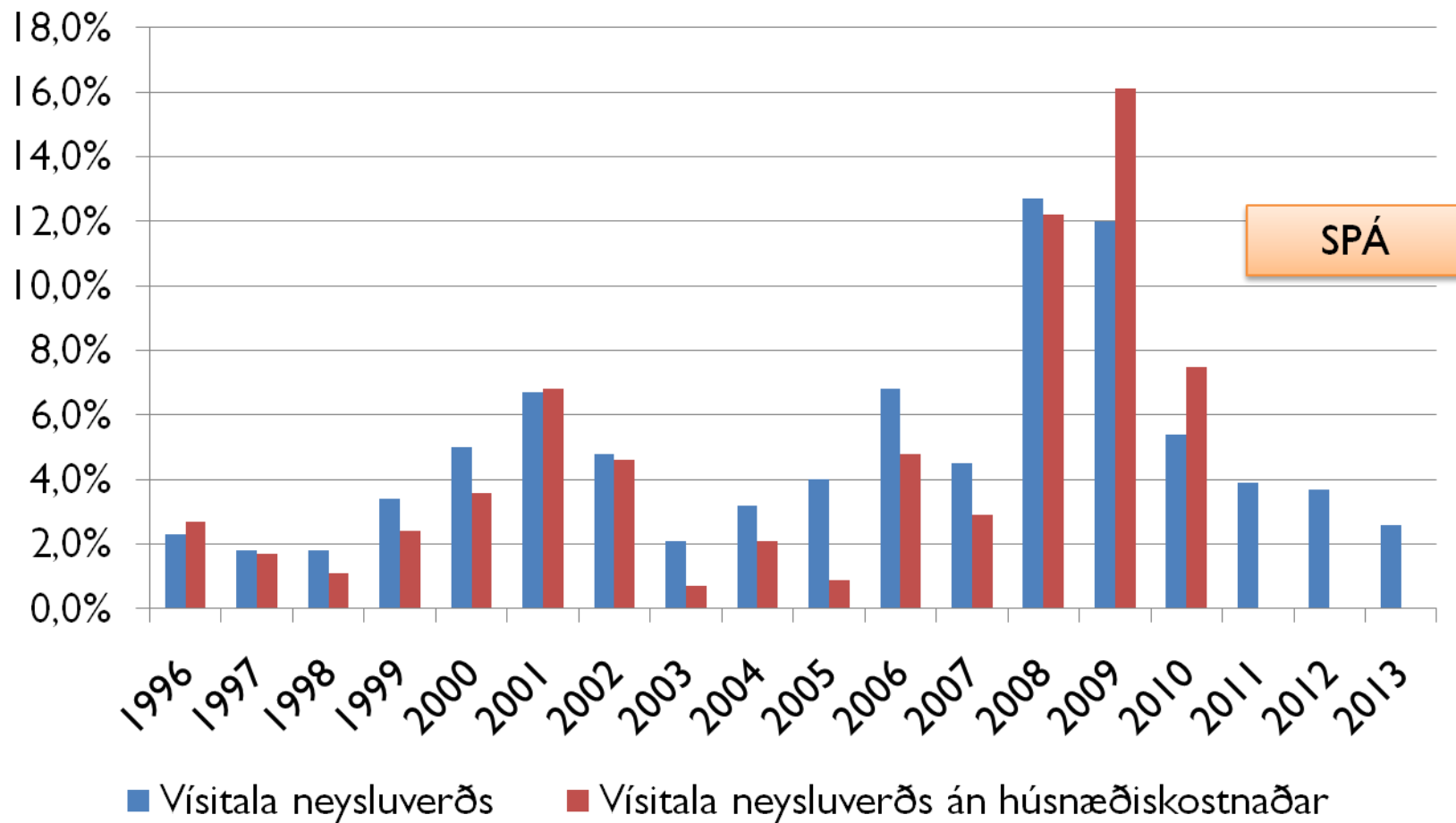


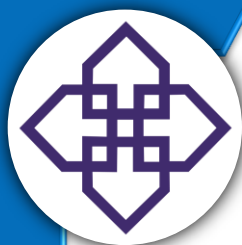
ALMENNT UM ÁRIÐ 2010

- Gengi krónunnar styrktist á árinu 2010 en hefur síðan lækkað á árinu 2011
- Verðbólga lækkaði verulega
- Atvinnuleysi náði ákveðnu jafnvægisstigi
 - Mjög misjafnt eftir landssvæðum
- Framkvæmdir drógust mikið saman
- Veruleg aukning útgjalda á ýmsum sviðum
 - Félagsþjónusta
 - Húsaleigubætur
- Erfiðar sparnaðaraðgerðir

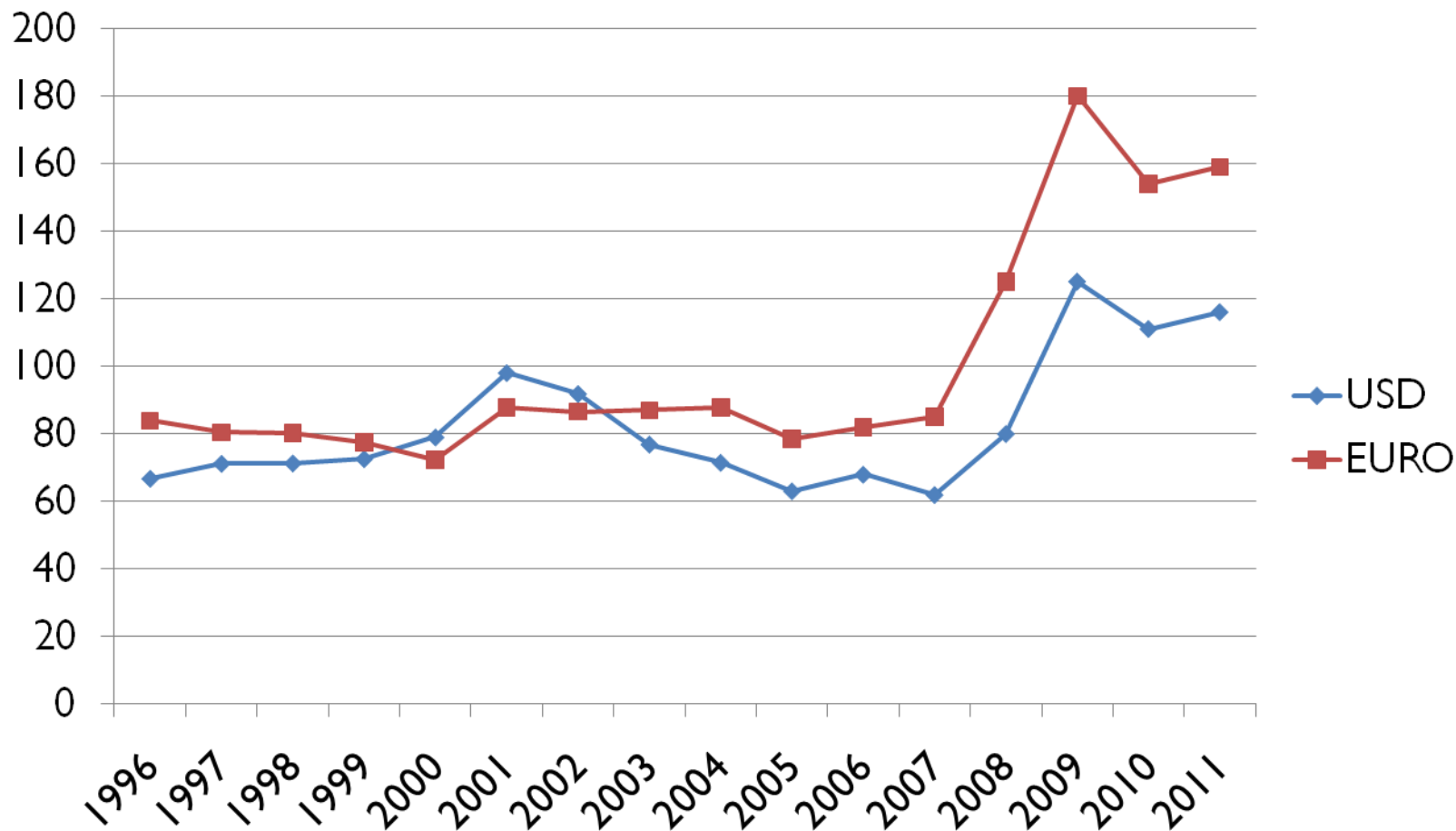


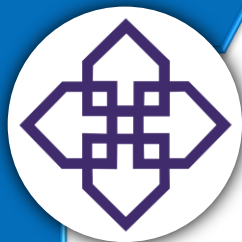
ÞRÓUN VERÐBÓLGU 1996 – 2013



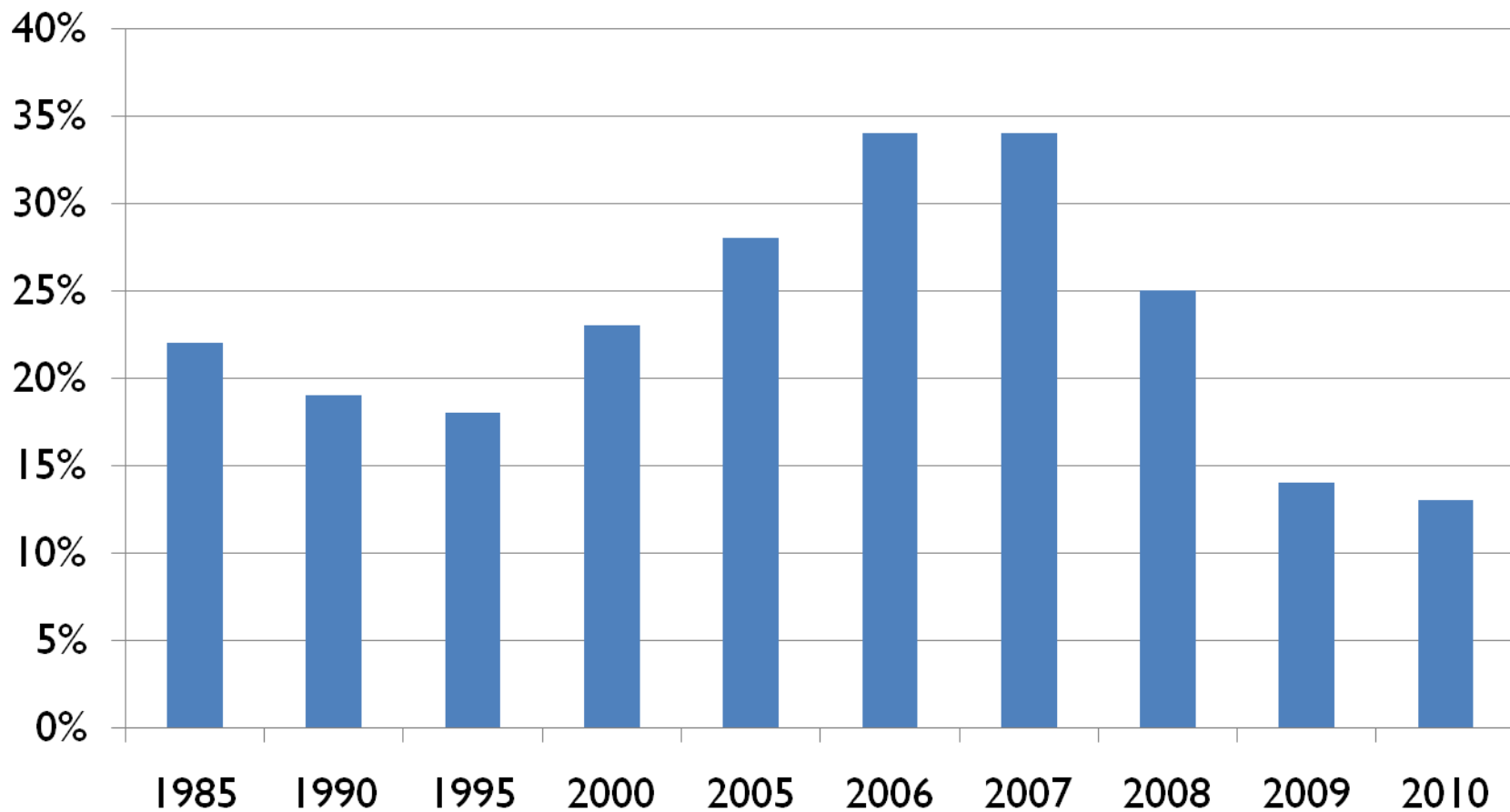


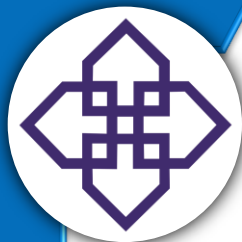
ÞRÓUN Á ÍSLENSKU KRÓNUNNI GAGNVART USD OG EURO





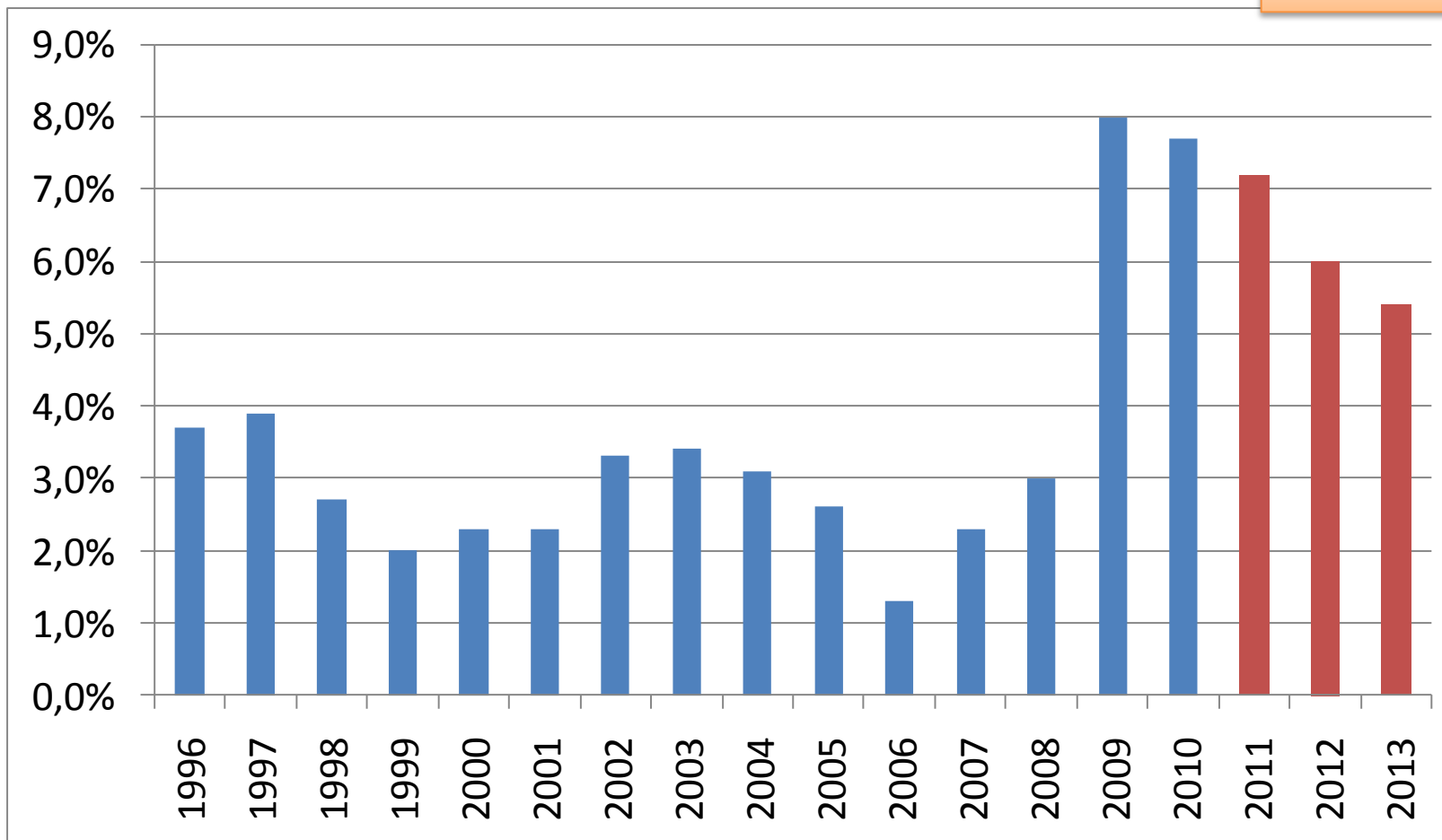
FJÁRFESTINGAR SEM % AF VLF

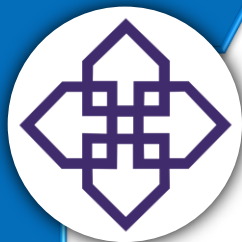




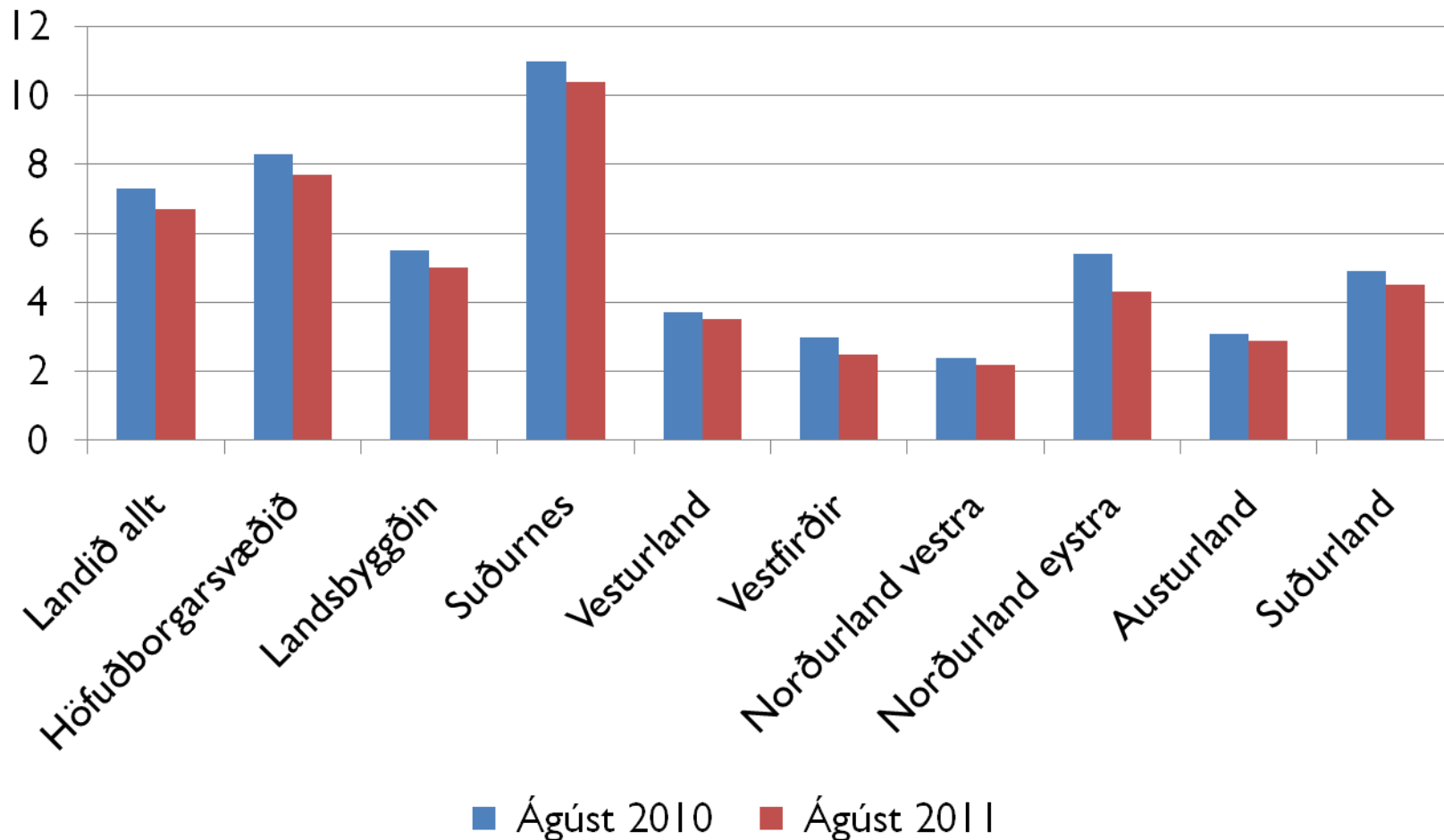
ÞRÓUN ATVINNULEYSIS

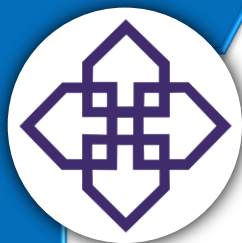
SPÁ



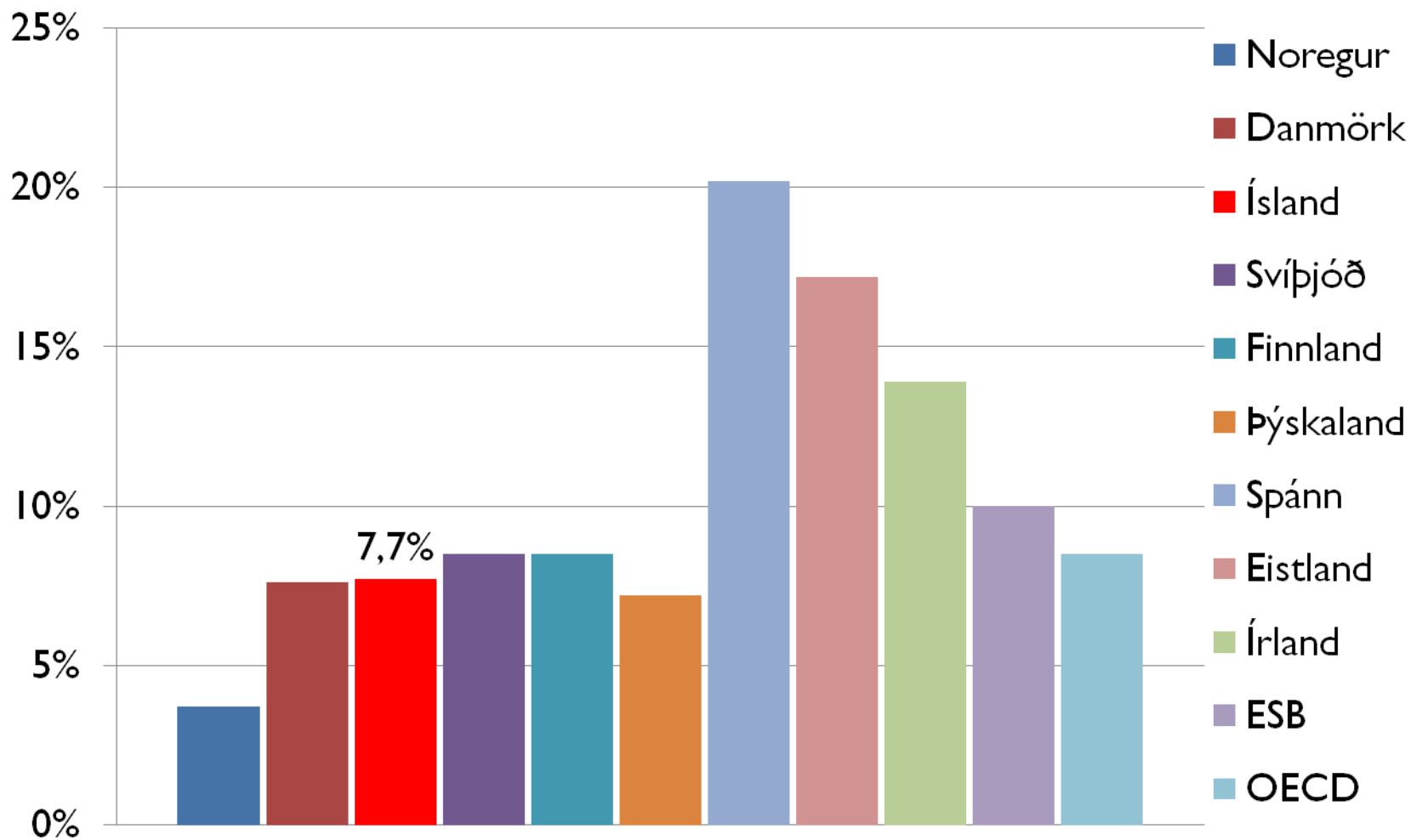


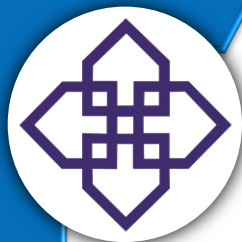
ATVINNULEYSI EFTIR LANDSSVÆÐUM %



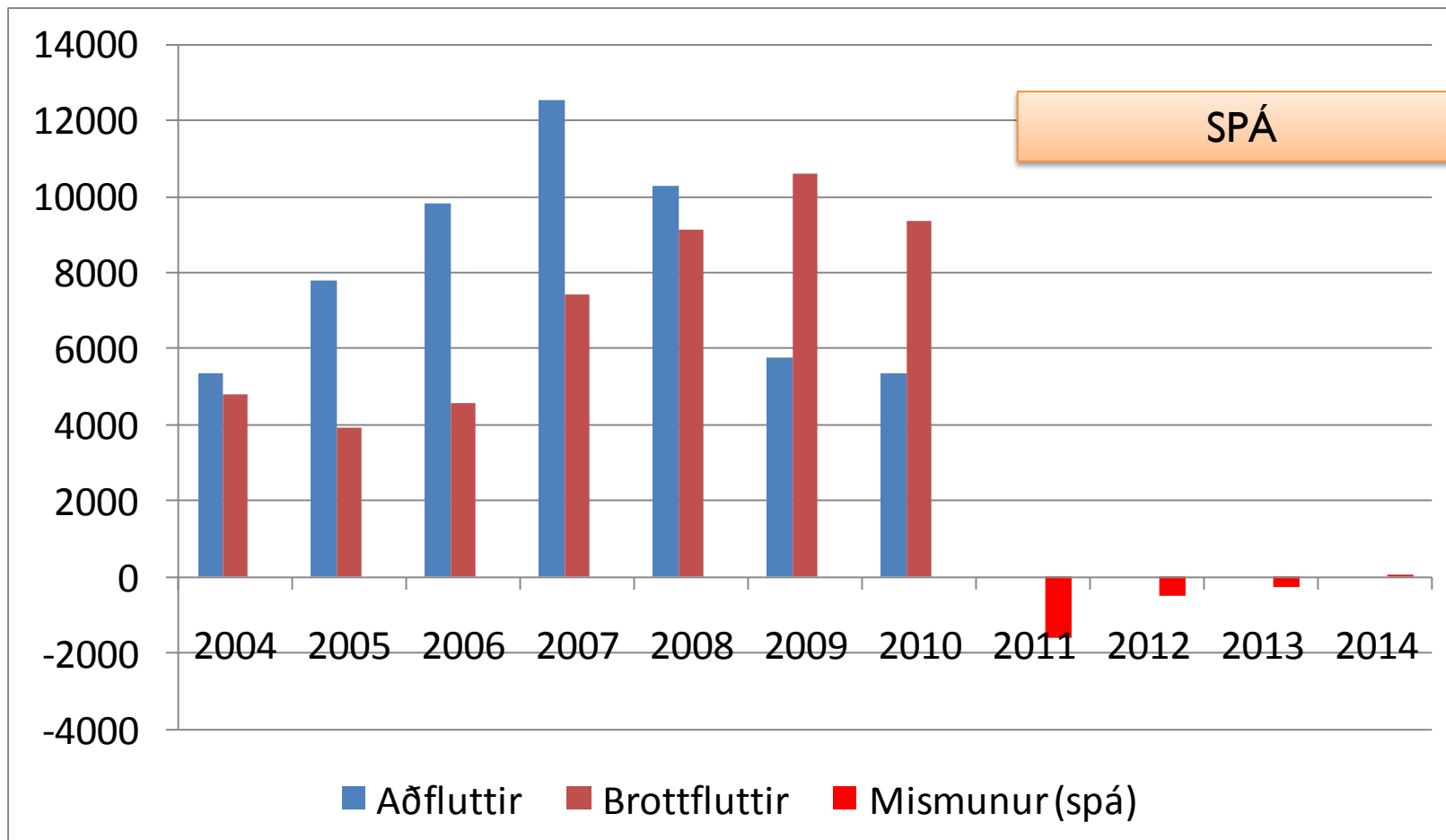


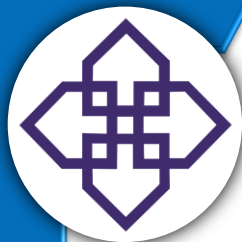
ATVINNULEYSI Í NOKKRUM LÖNDUM 2010





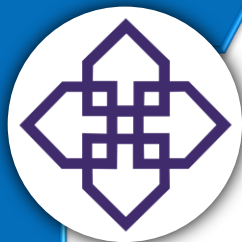
BÚFERLAFLUTNINGAR TIL OG FRÁ LANDINU



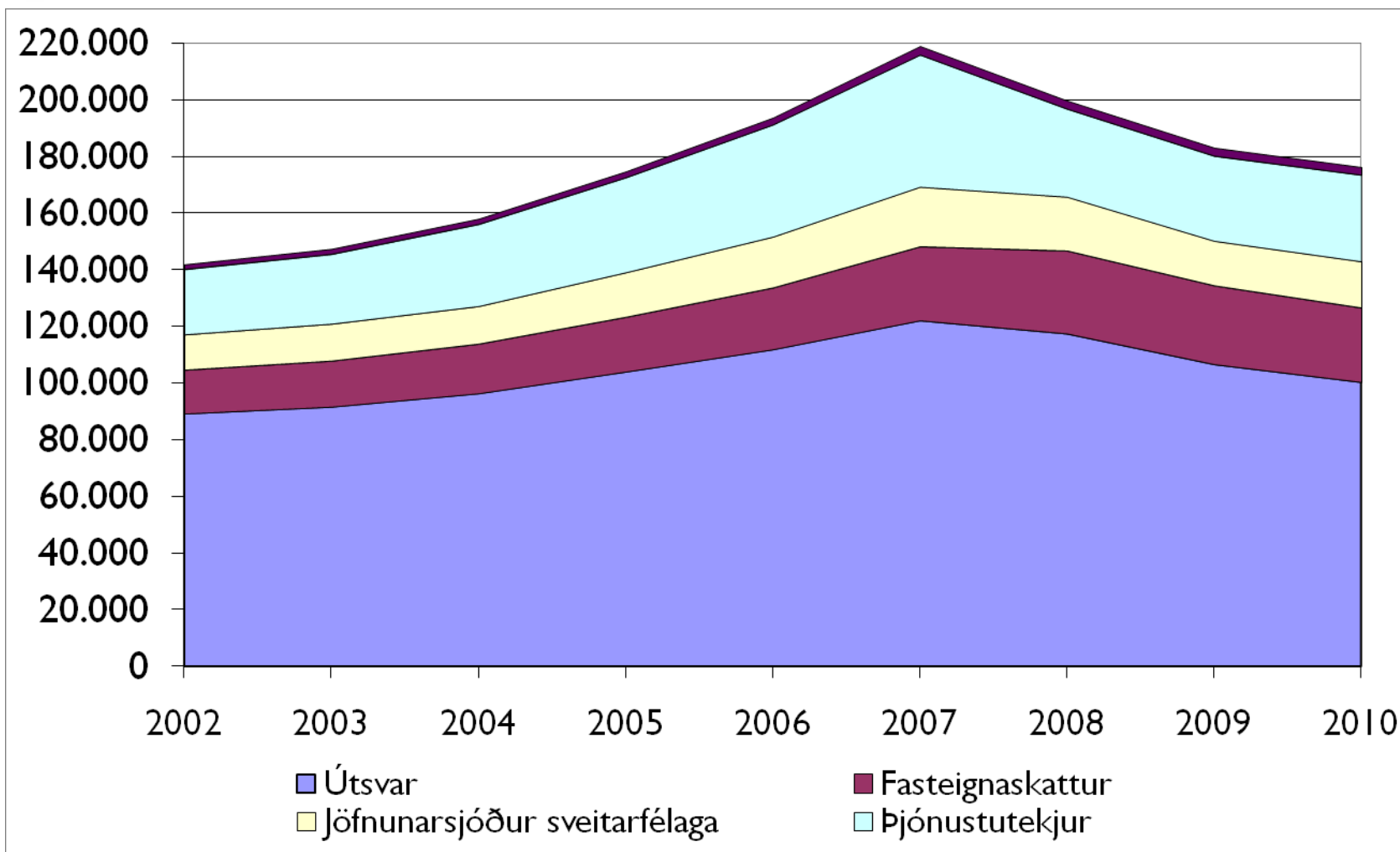


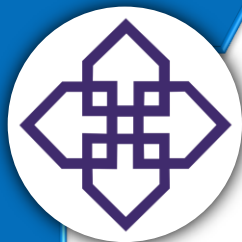
FLOKKUN SVEITARFÉLAGA

	Reykjavík	Höfuðsv. án Reykjavíkur	Vaxtar- svæði	Önnur sveitarfélög	Samtals
Íbúafjöldi	118.908	83.278	71.408	44.642	318.236
Hlutfall íbúafjölda	37,4%	26,2%	22,4%	14,0%	100,0%

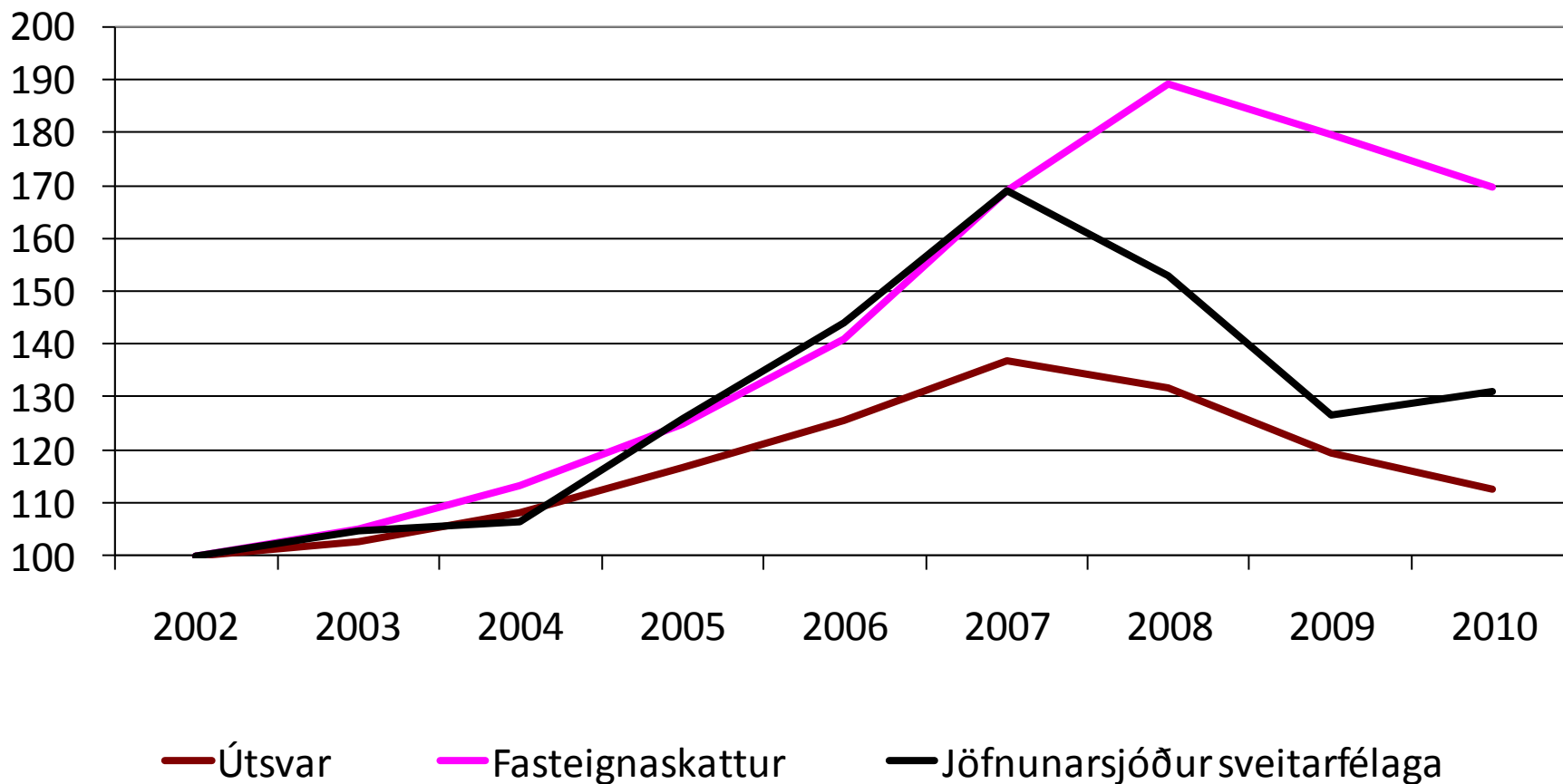


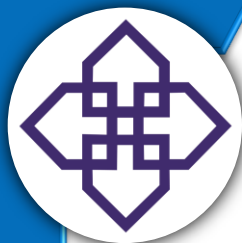
TEKJUR SVEITARFÉLAGA, M.KR. (VERÐLAG 2010)



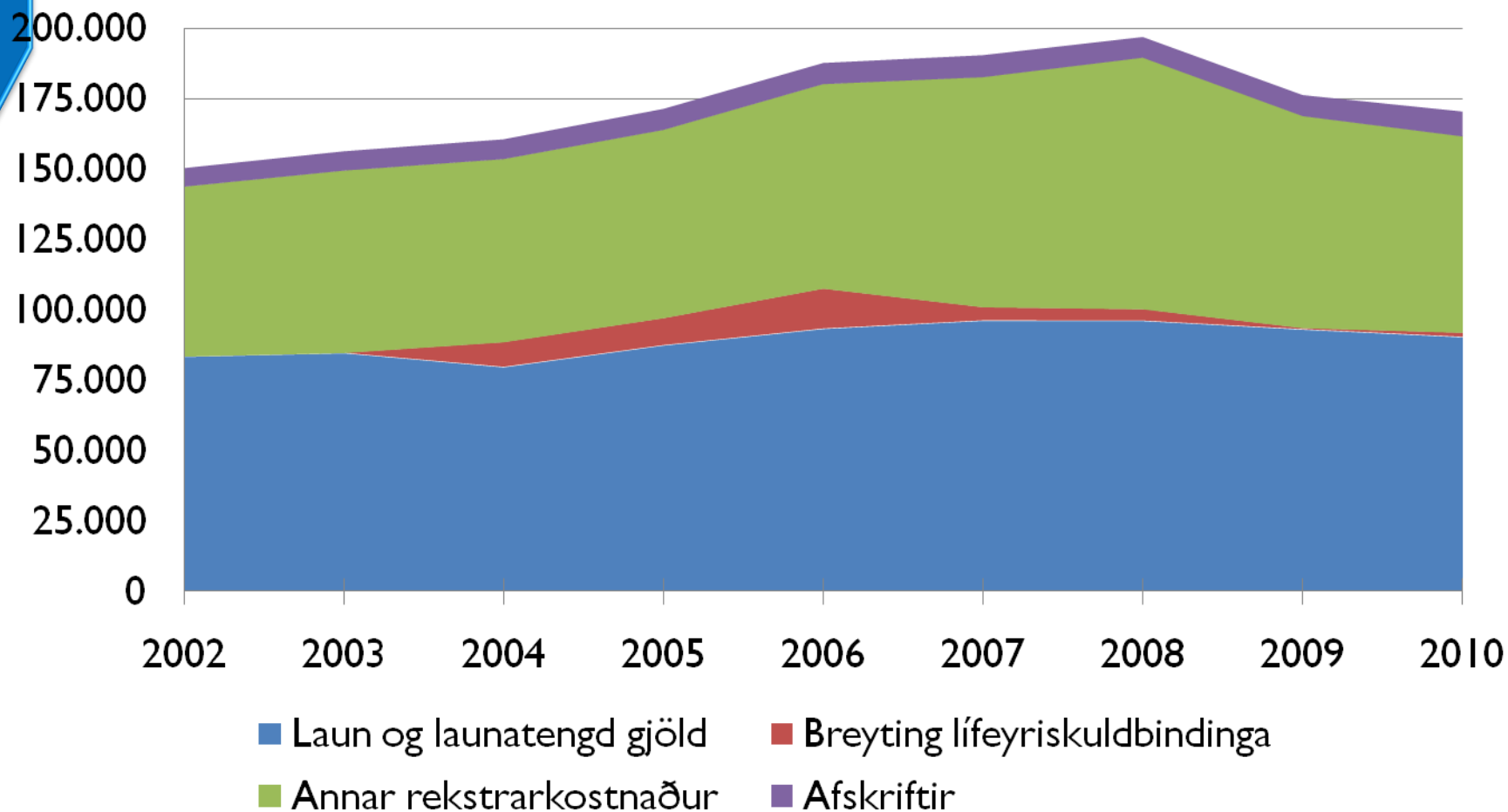


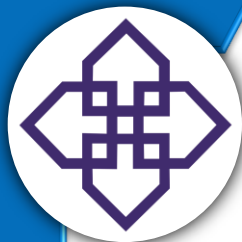
HLUTFALLSLEG ÞRÓUN TEKJUSTOFNA SVEITARFÉLAGA (2002 – 2010)





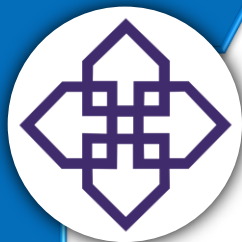
REKSTRARKOSTNAÐUR SVEITARFÉLAGA, M.KR. (2002 – 2010)



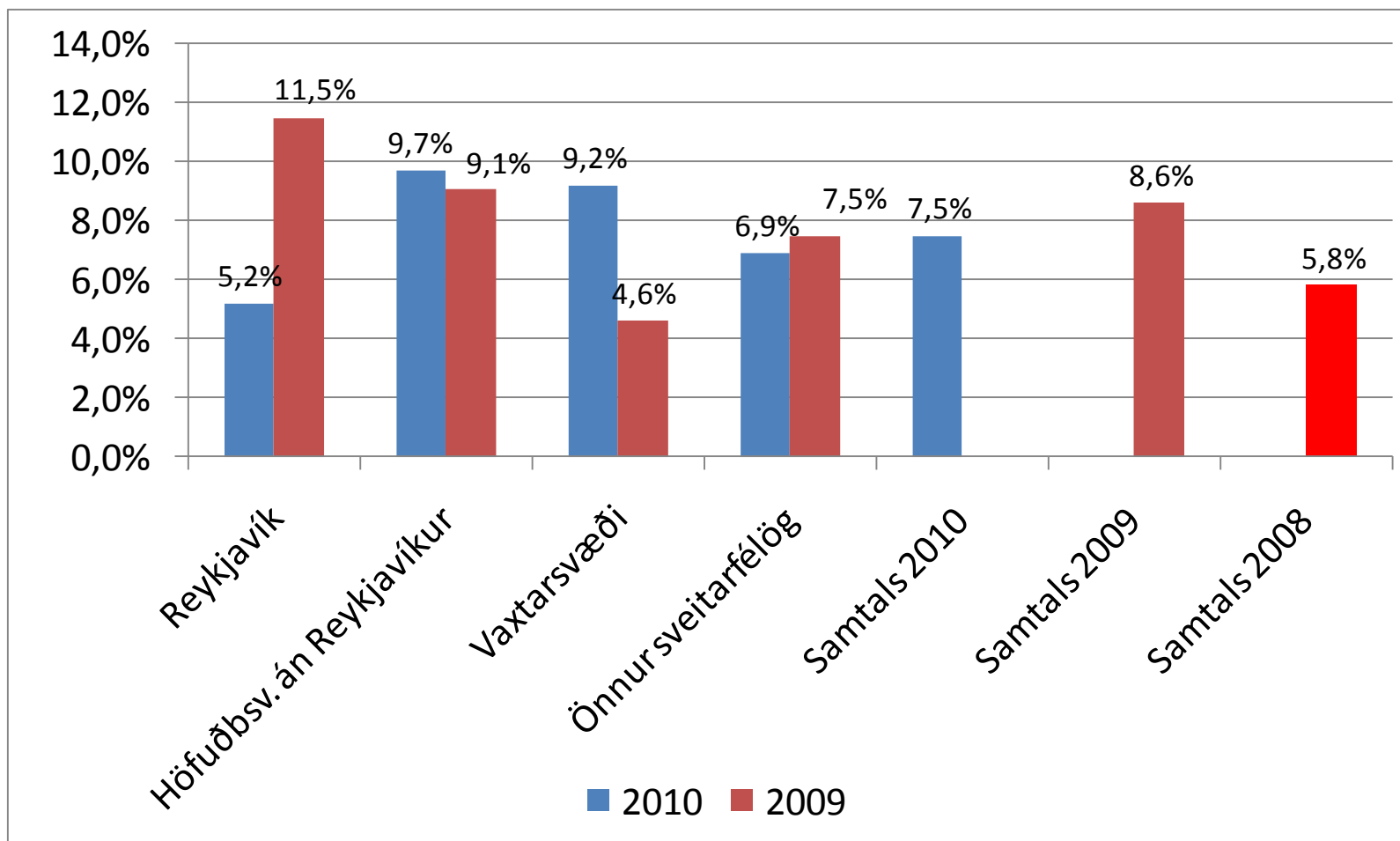


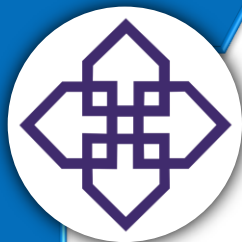
REKSTRARAFKOMA SVEITARFÉLAGA

- Heildartekjur
 - Útsvar
 - Fasteignaskattur
 - Jöfnunarsjóður
 - Þjónustutekjur
 - Annað
- Breytilegur kostnaður (dreginn frá)
 - Laun
 - Annar rekstrarkostnaður
- = Framlegð



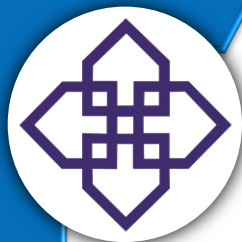
FRAMLEGÐ % AF HEILDARTEKJUM





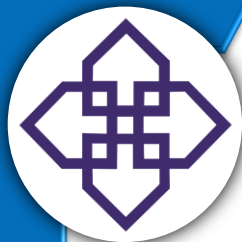
NIÐURSTAÐA FYRIR ÓREGLULEGA LIÐI

- Framlegð
- Frá framlegð dragast:
 - Afskriftir
 - Breytingar á lífeyrisskuldbindingum
- = Niðurstaða fyrir fjármagnsliði
- Fjármagnsliðir (+/-)
- = **Rekstrarniðurstaða fyrir óreglulega liði**
- +/- Óreglulegir liðir
- = Rekstrarniðurstaða eftir óreglulega liði

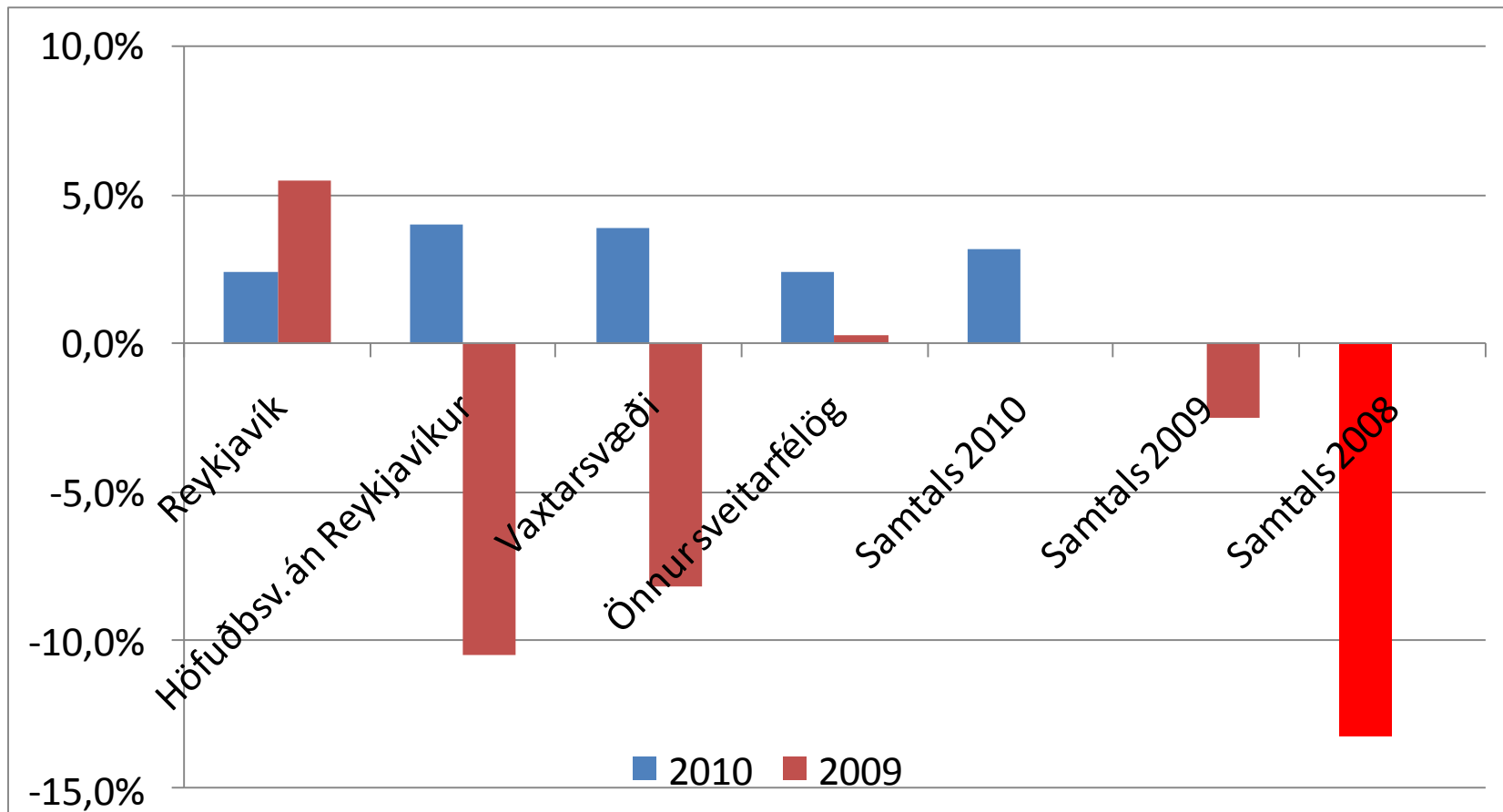


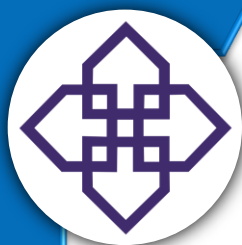
REKSTRARNIÐURSTAÐA FYRIR OG EFTIR ÓREGLULEGA LIÐI M.KR.

	Reykjavík Höfuðsv. án Vaxtar- Reykjavíkur svæði sveitarfélög			Önnur	Samtals 2010	Samtals 2009
Niðurstaða án fjármagnsliða og óregl. l.	-218	1.512	837	533	2.665	3.400
Fjármunatekjur (+)og fjármagnsgjöld (-)	1.690	173	775	172	2.810	-7.722
Rekstrarniðurstaða fyrir óreglulega liði	1.472	1.685	1.613	705	5.475	-4.322
Óreglulegir liðir	0	-51	-66	-170	-287	7.949
Rekstrarniðurstaða eftir óreglulega liði	1.472	1.634	1.546	-535	5.188	3.627

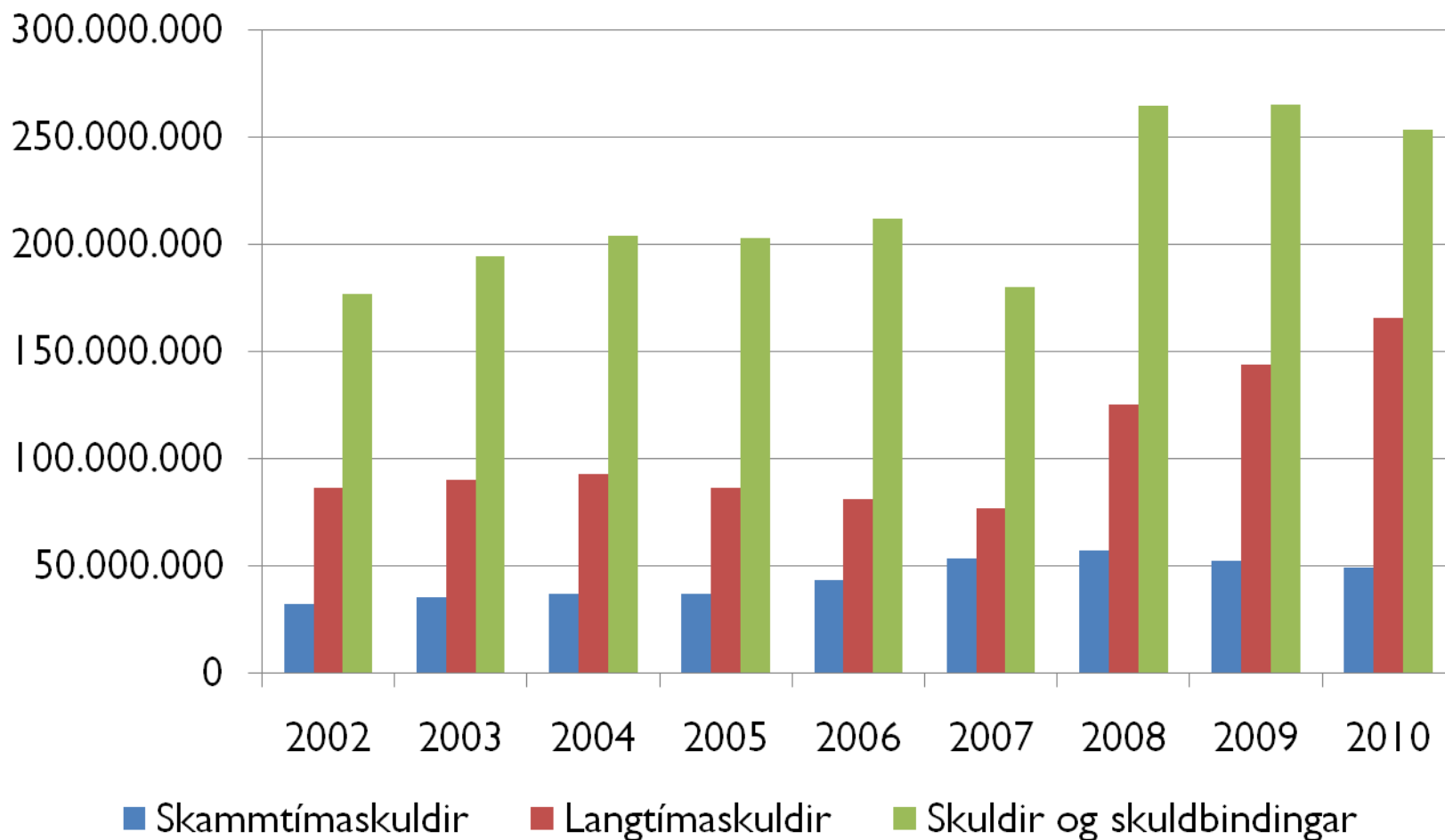


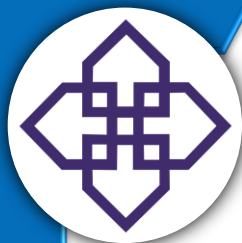
REKSTRARNIÐURSTAÐA A HLUTA % AF HEILDARTEKJUM



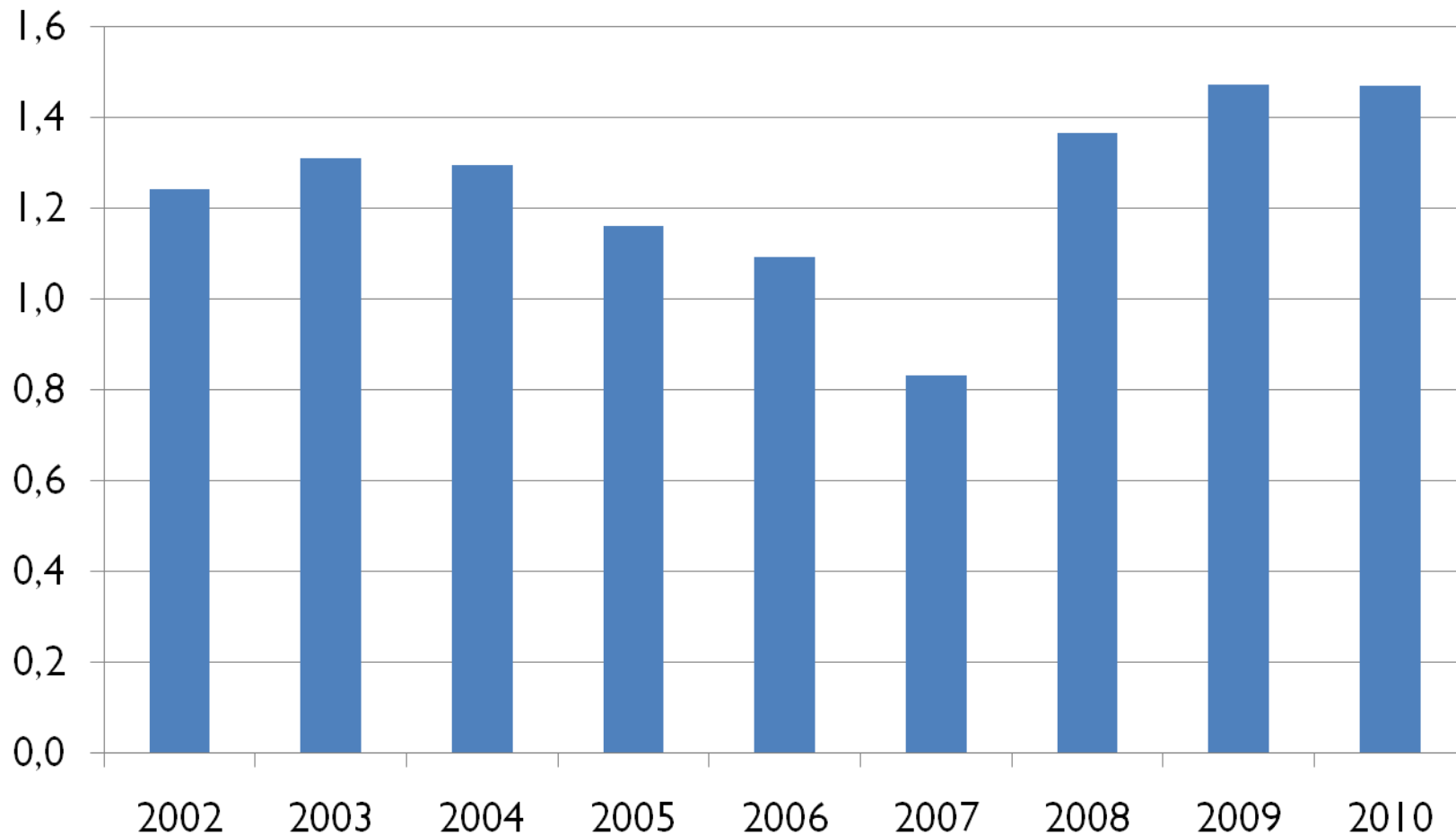


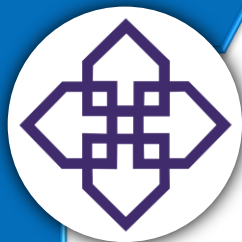
ÞRÓUN Á SKULDUM OG SKULDBINDINGUM SVEITARFÉLAGANNA (A-HLUTA) ÞÚS. KR. VERÐLAG 2010



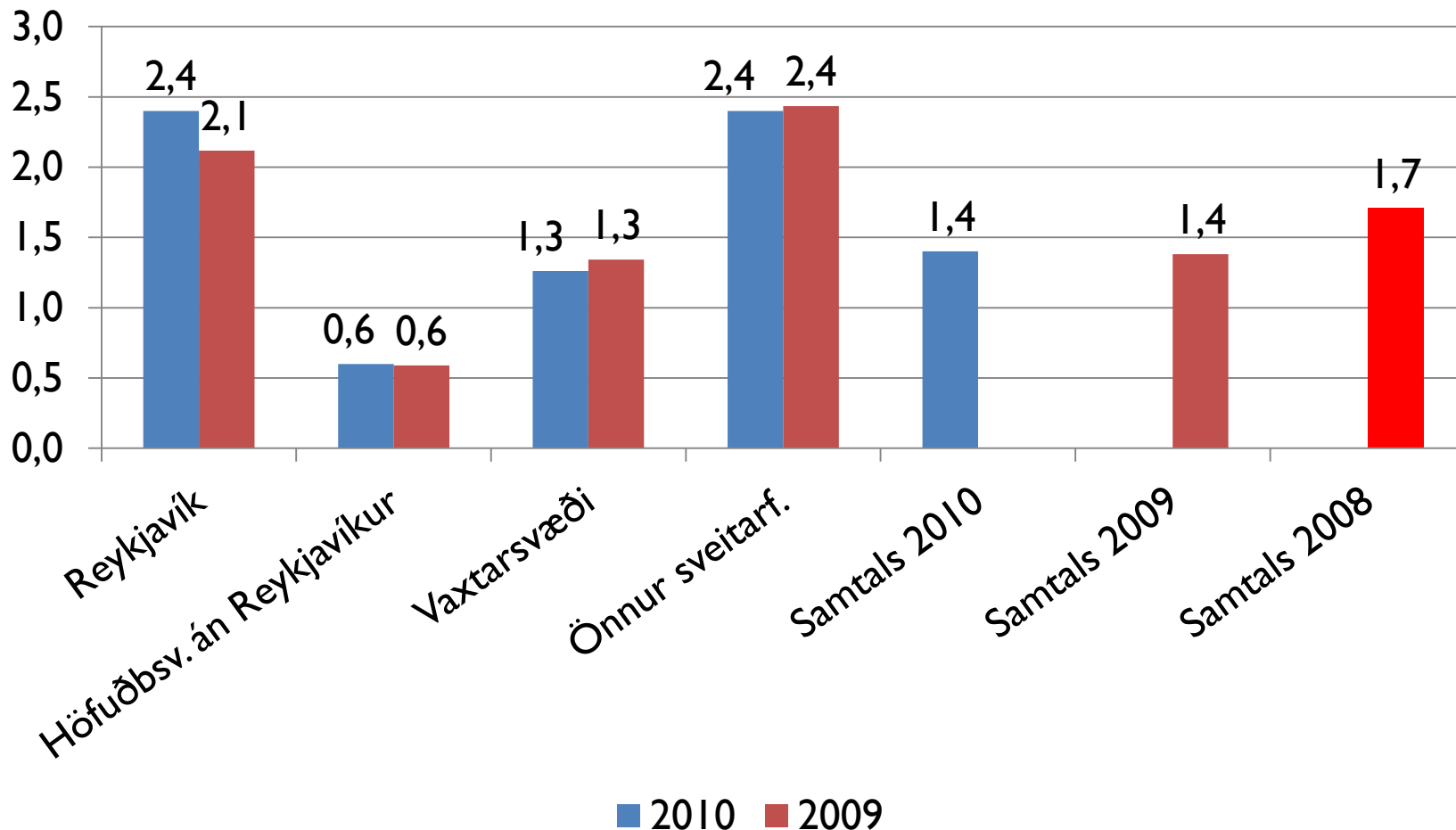


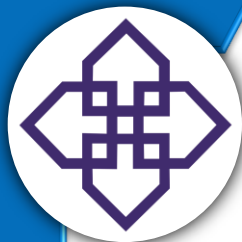
HEILDARSKULDIR / HEILDARTEKJUR





VELTUFJÁRHLOUTFALL (VELTUFJÁRMUNIR / SKAMMTÍMASKULDIR)





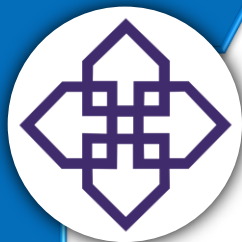
VELTUFÉ FRÁ REKSTRI

+ Rekstrarniðurstaða

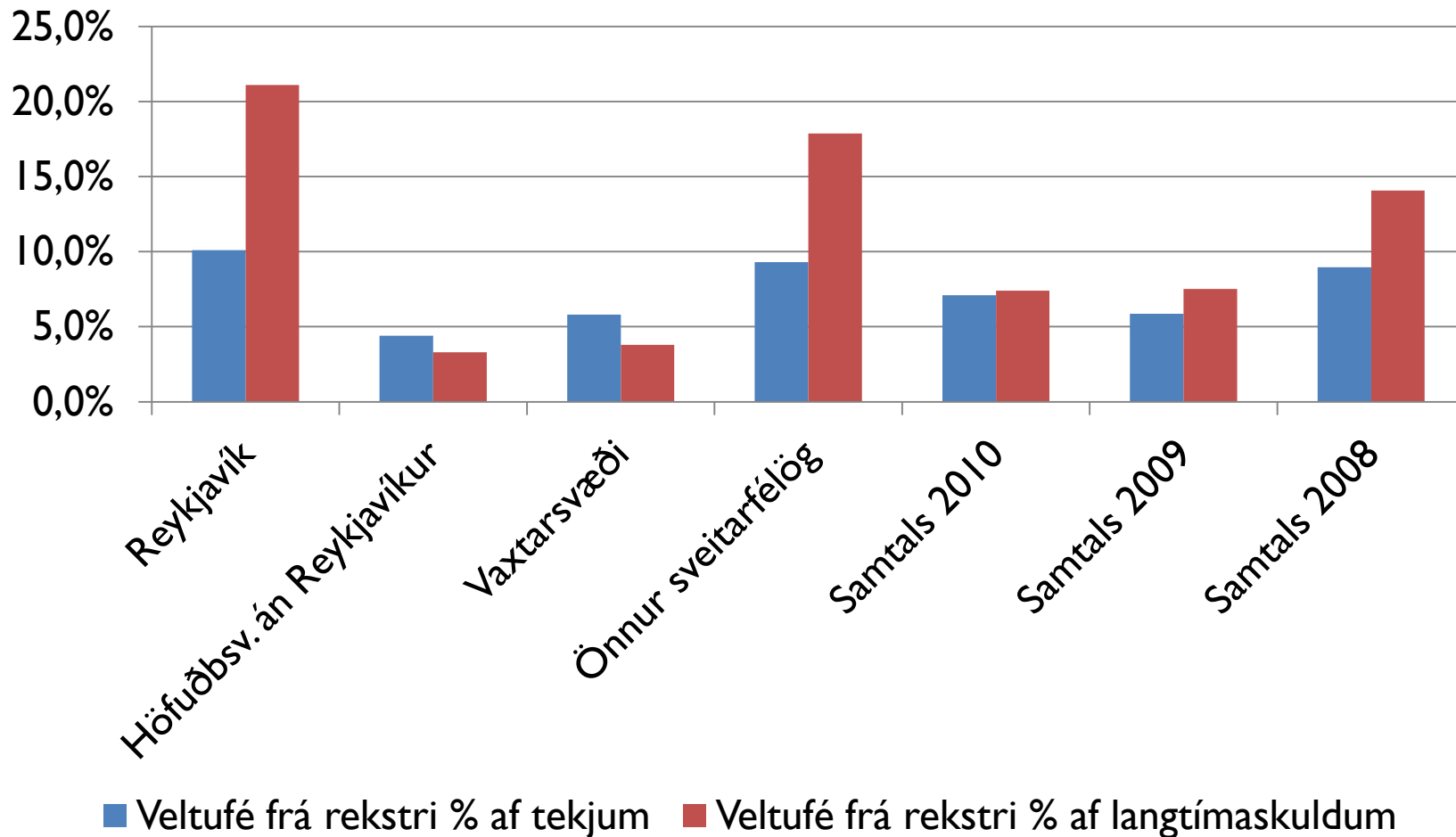
- Afskriftir
- Breytingar á lífeyrisskuldbindingum
- Gengismunur
- Verðbótaþáttur

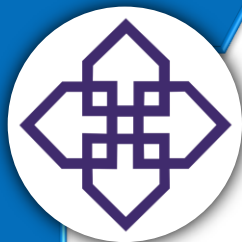
= Veltufé frá rekstri

- Veltufé frá rekstri er eftir þegar búið er að borga alla daglega reikninga
- Veltufé frá rekstri er notað til að greiða afborganir lána og til fjárfestinga

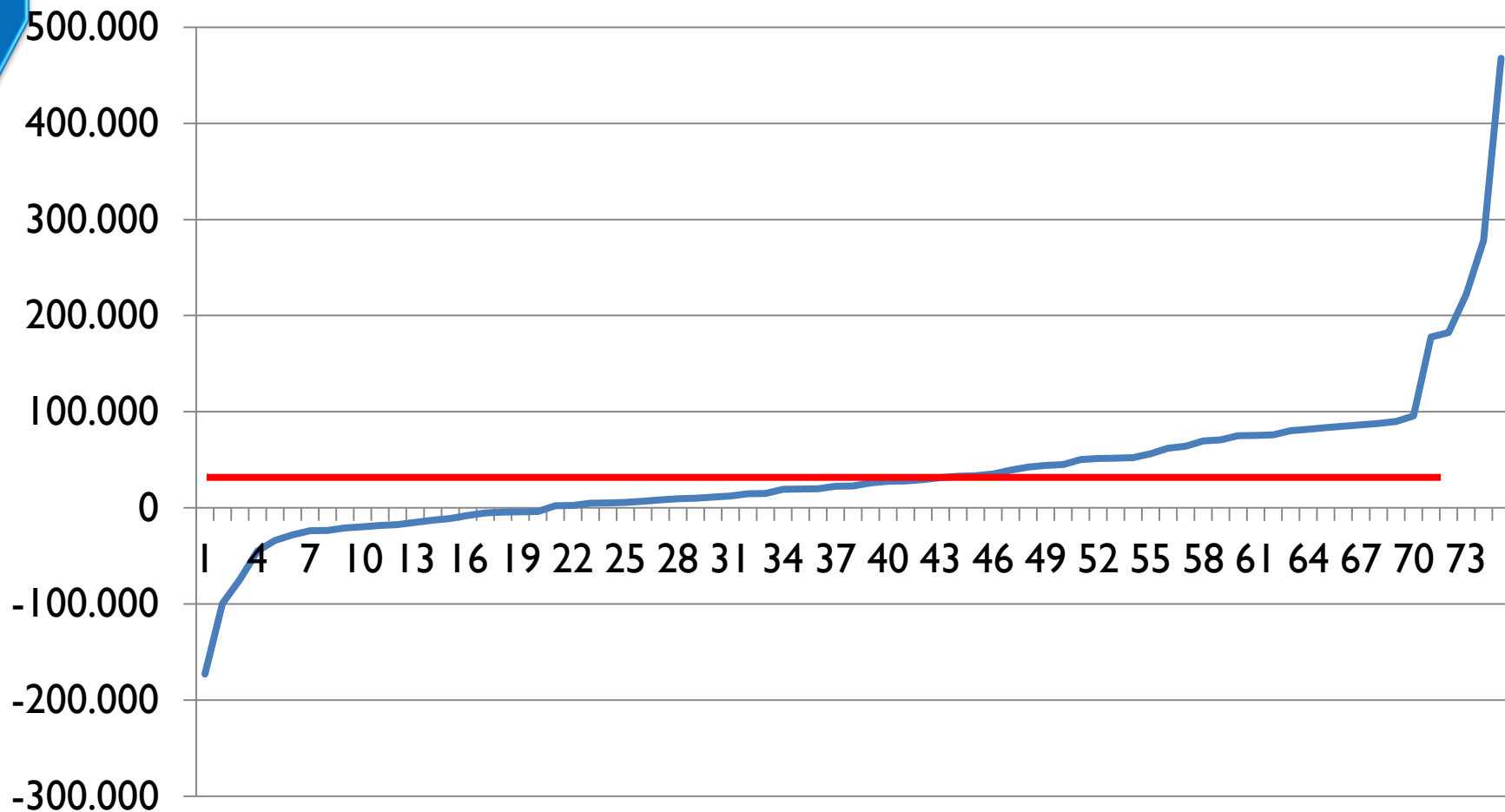


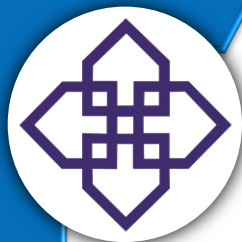
VELTUFÉ FRÁ REKSTRI



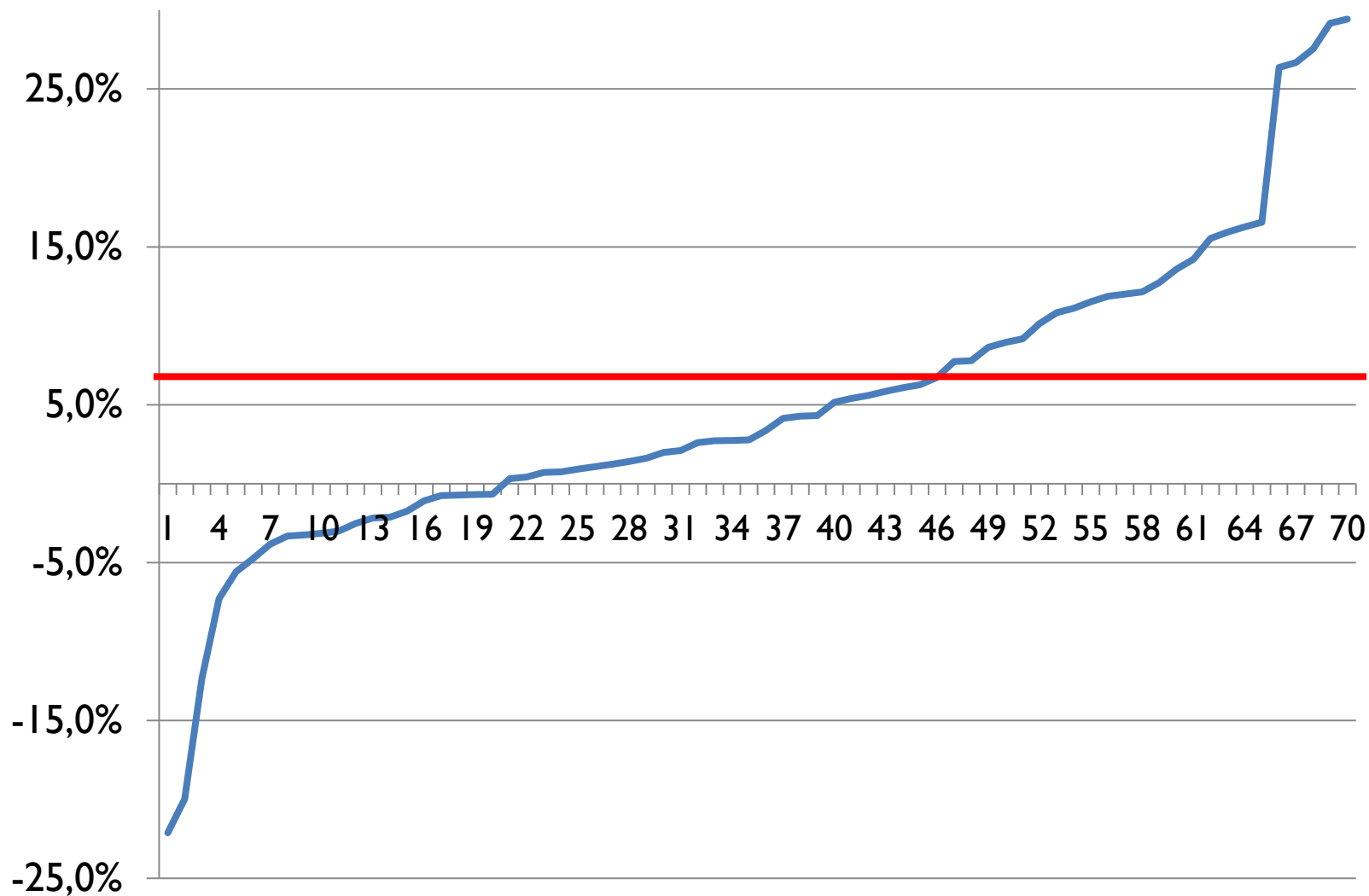


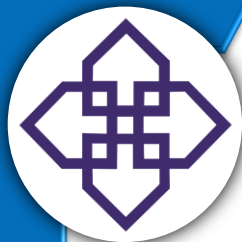
VELTUFÉ FRÁ REKSTRI, KR. Á ÍBÚA



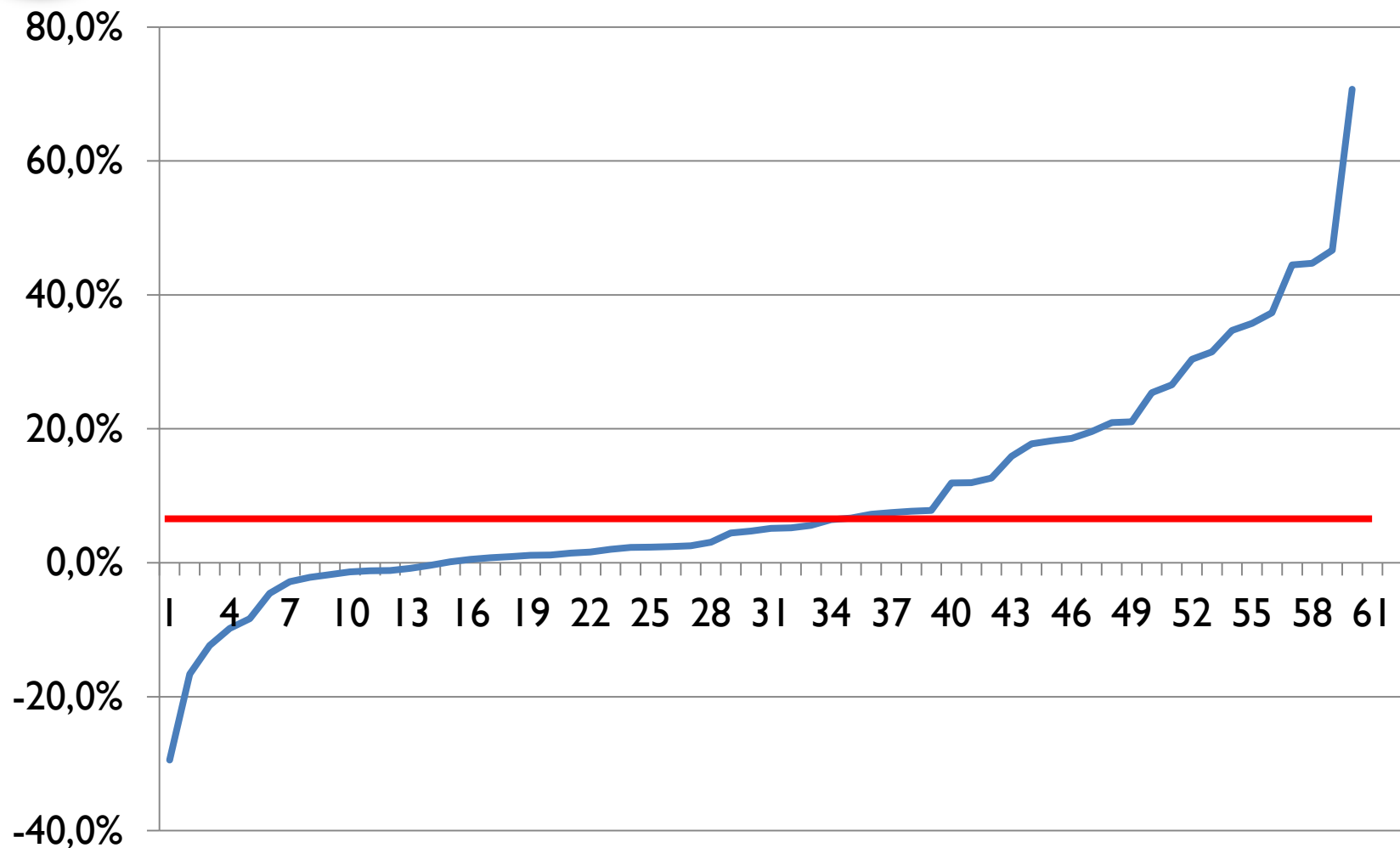


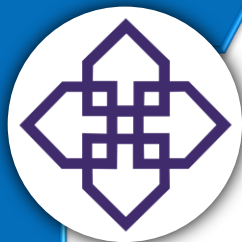
VELTUFÉ FRÁ REKSTRI, % AF HEILDARTEKJUM





VELTUFÉ FRÁ REKSTRI, % AF LANGTÍMASKULDUM





NIÐURSTÖÐUR ÞJÓÐHAGSSPÁR FRÁ JÚLÍ 2011

- Landsframleiðsla vex um 3,1% árið 2012
- Einkaneysla vex um 3,3%
- Samneysla dregst saman um 0,8%
- Gengi krónunnar breytist lítið
- Verðbólga verður hærrí en reiknað var með
 - Áhrif kjarasamninga
 - Veiking á gengi krónunnar
- Atvinnuleysi verður áfram nokkuð hátt
- Ný þjóðhagsspá verður birt í nóvember
- Yfirlit verður sent sveitarfélögum