

Eesti 2025 – kuidas on muutunud majanduskeskkond?

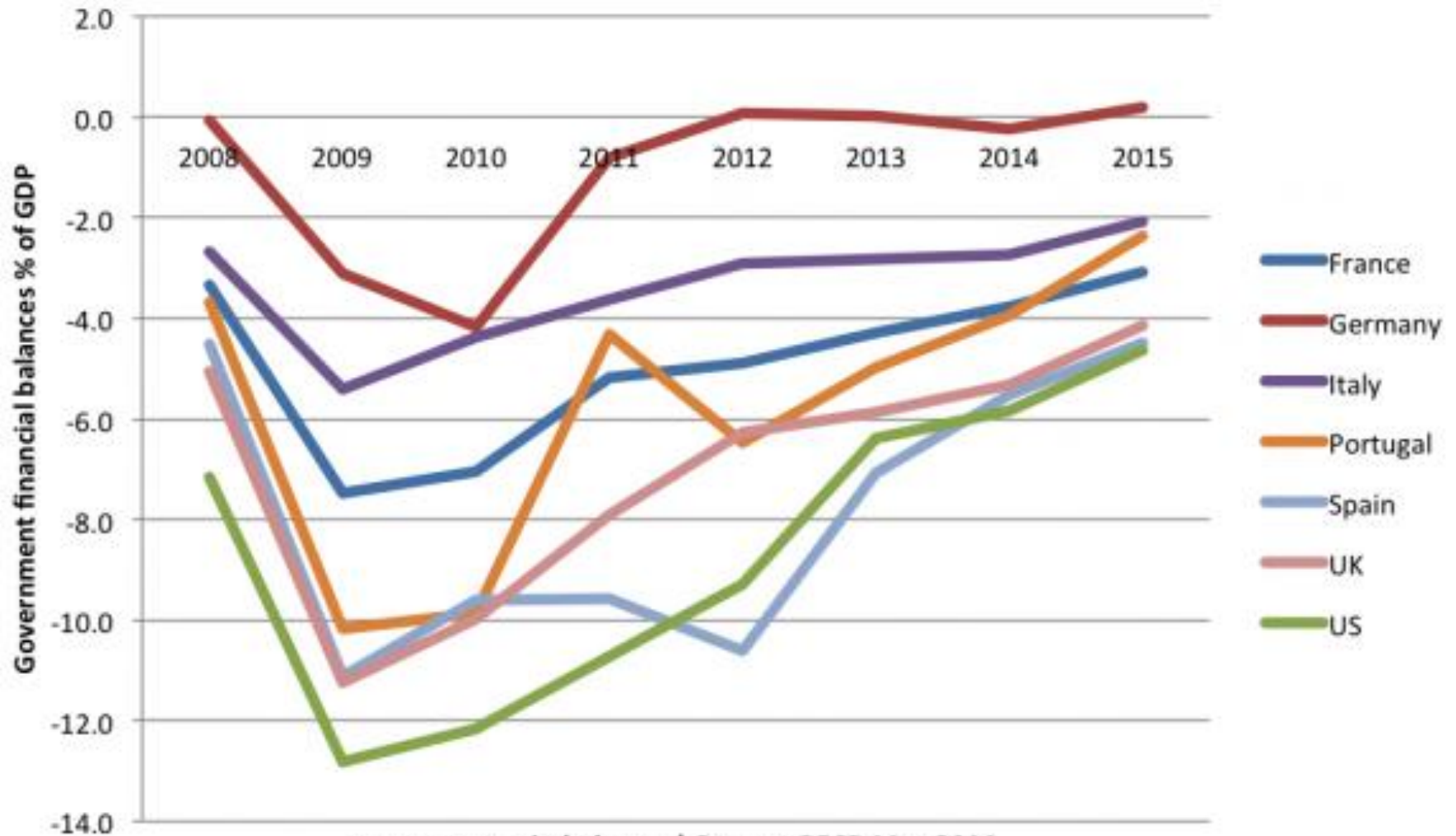
Kristjan Lepik

Veebruar 2016

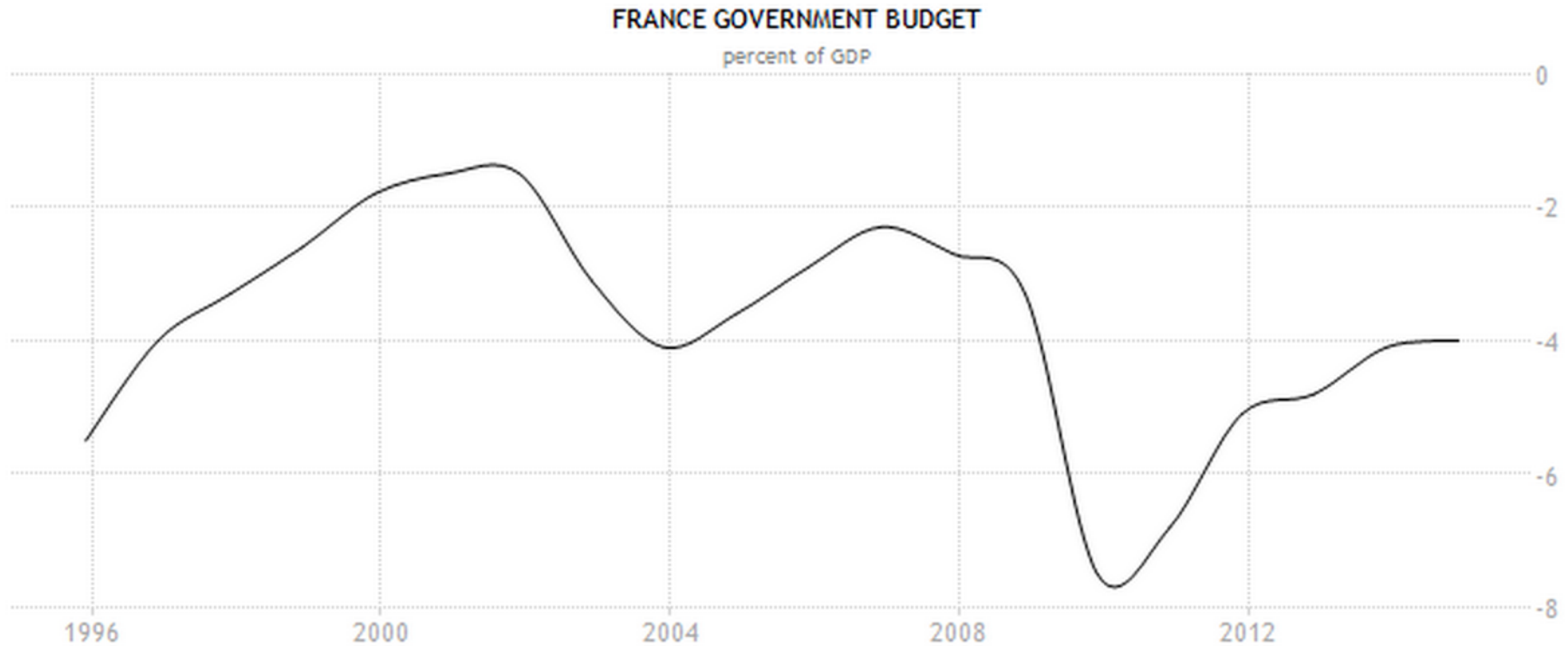
1. Maailma majandus

Lääneriikide eelarved ikka punases

EU Budget deficits

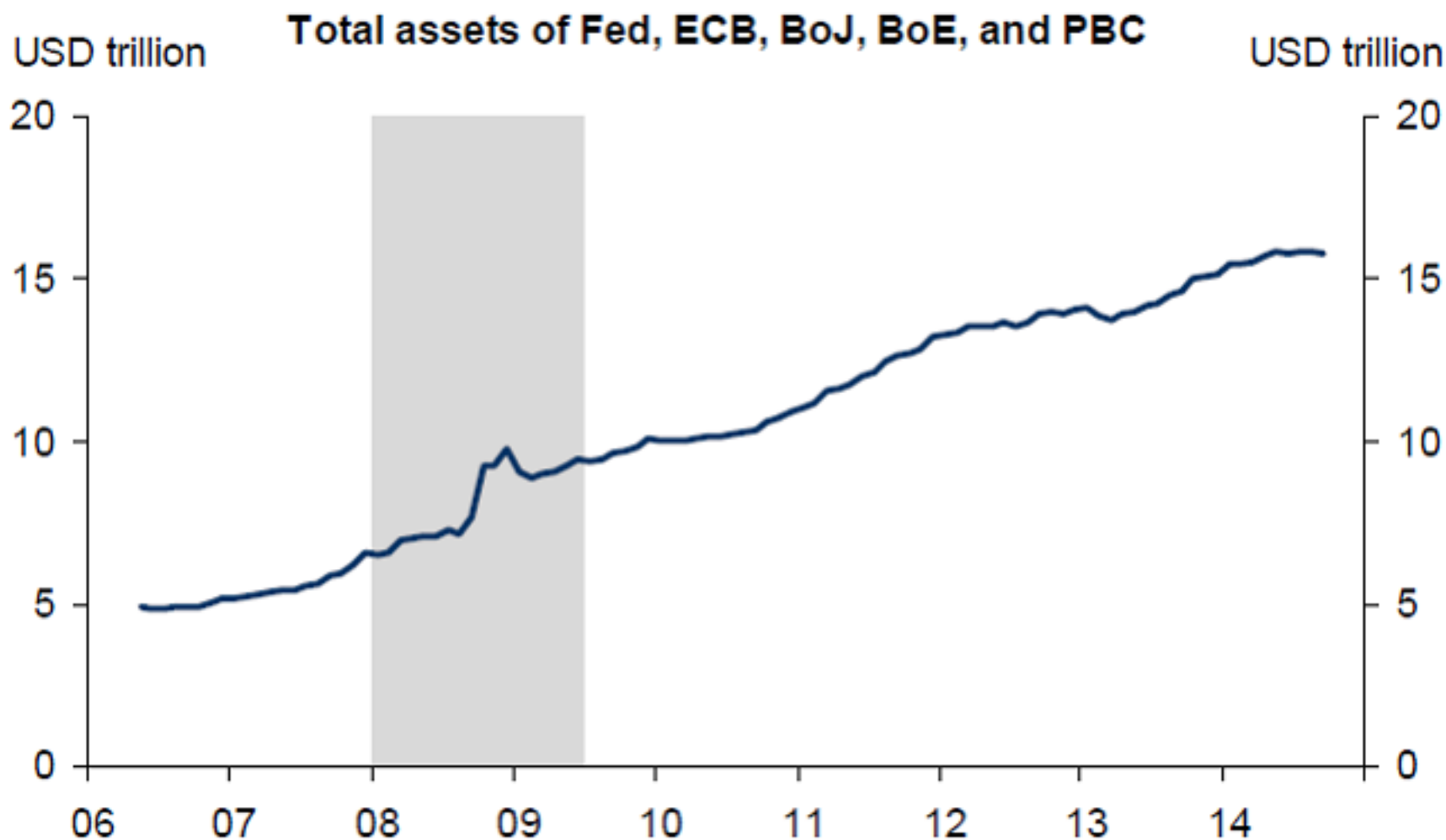


Prantsusmaa riigieelarve tasakaal



SOURCE: WWW.TRADINGECONOMICS.COM | EUROSTAT

Central banks have printed more than \$10trn dollars since the crisis began

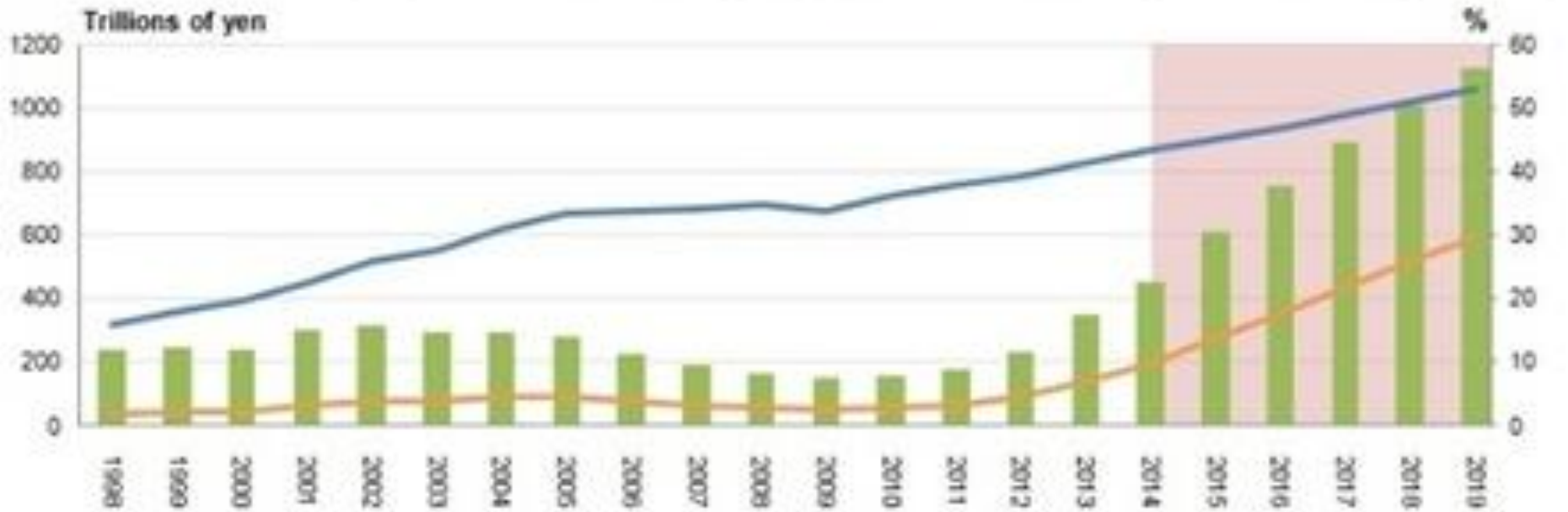


Source: BoE, FRB, BoJ, ECB, PBC, SAFE, Haver Analytics, Deutsche Bank Research

Jaapan – keskpanga sekkumine

BOJ's dominance of the bond market

— Outstanding JGB stock (LHS) — Central bank holdings (LHS) — Central bank holdings as % of outstanding JGBs (RHS)



Shaded area represents future estimates

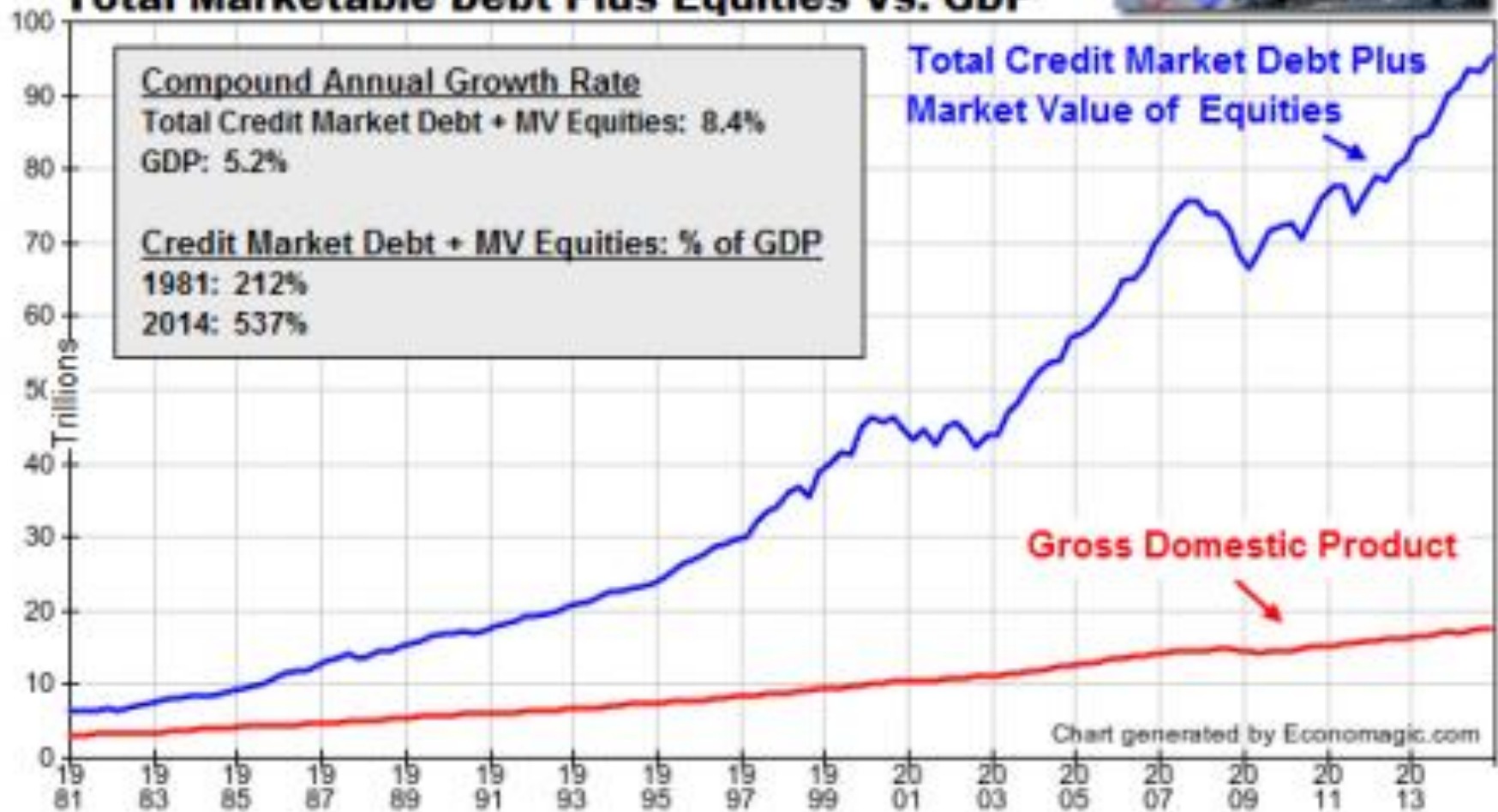
Source: Bank of Japan, Datastream

Andy Mukherjee, Robyn Mak 05/11/2014

Finantsurgude maht ja majandus

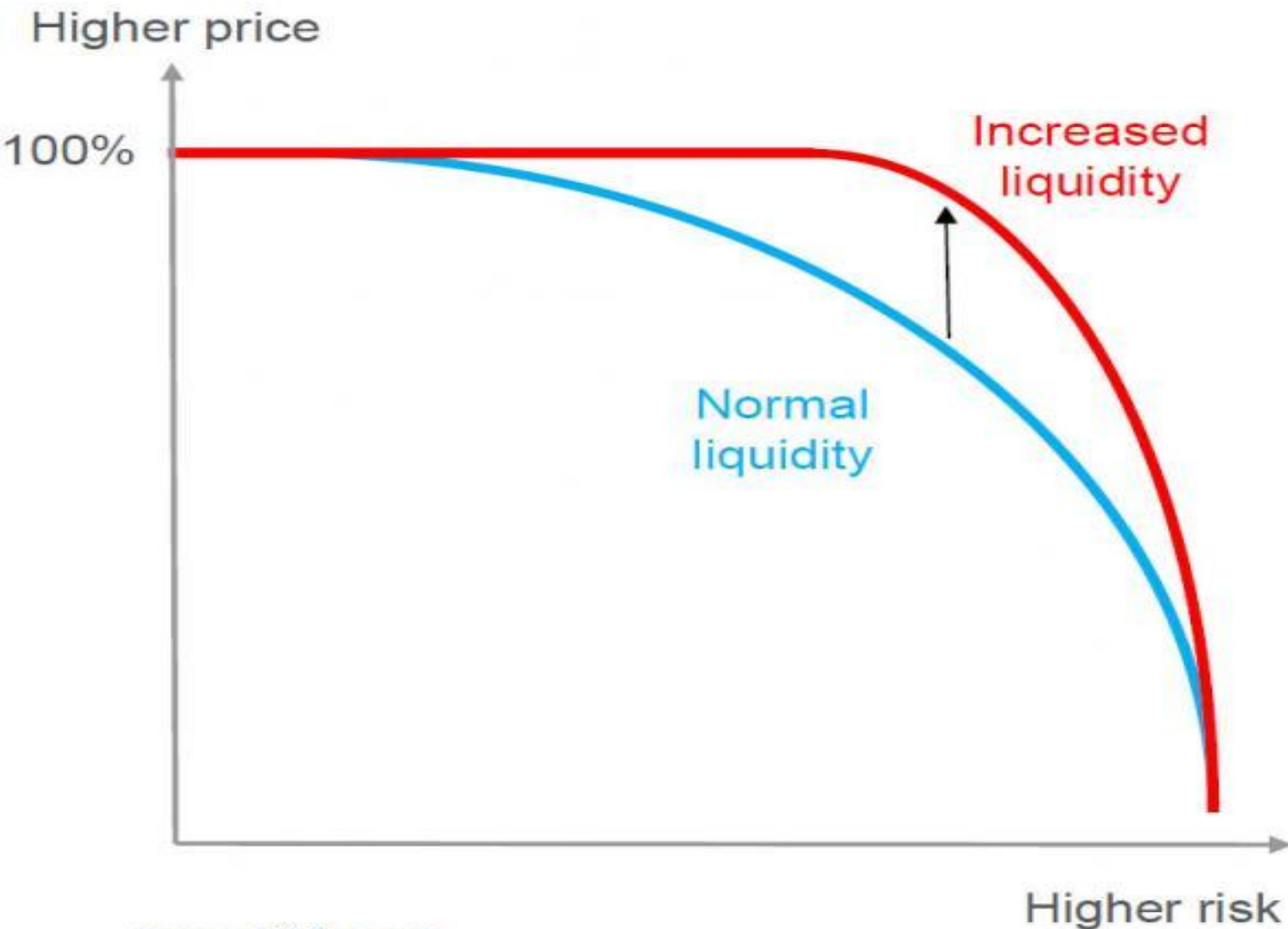
Financialization of the US Economy -

Total Marketable Debt Plus Equities Vs. GDP

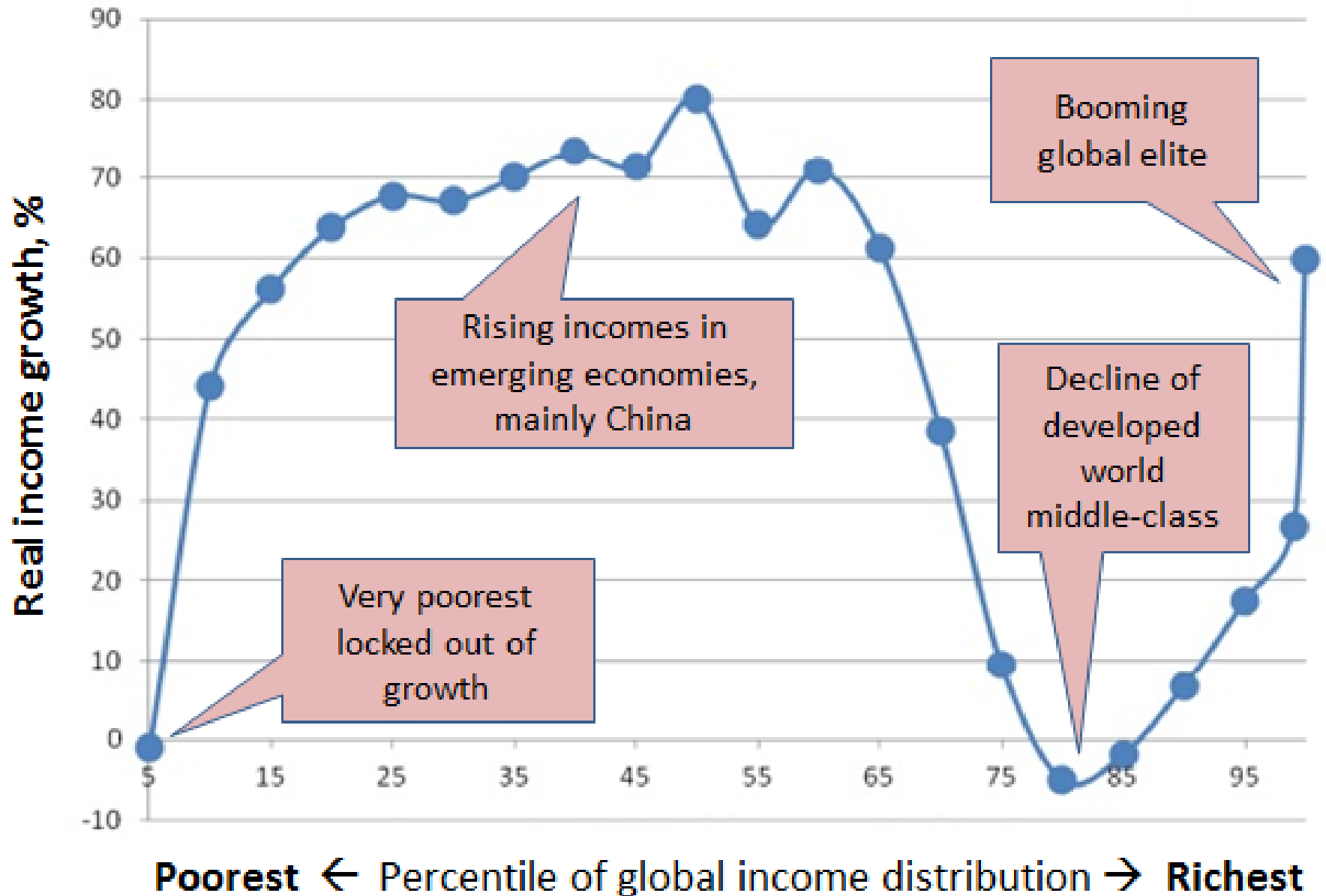


Ride the wave – but mind the cliff!

How credit pricing reacts to increased liquidity, schematic

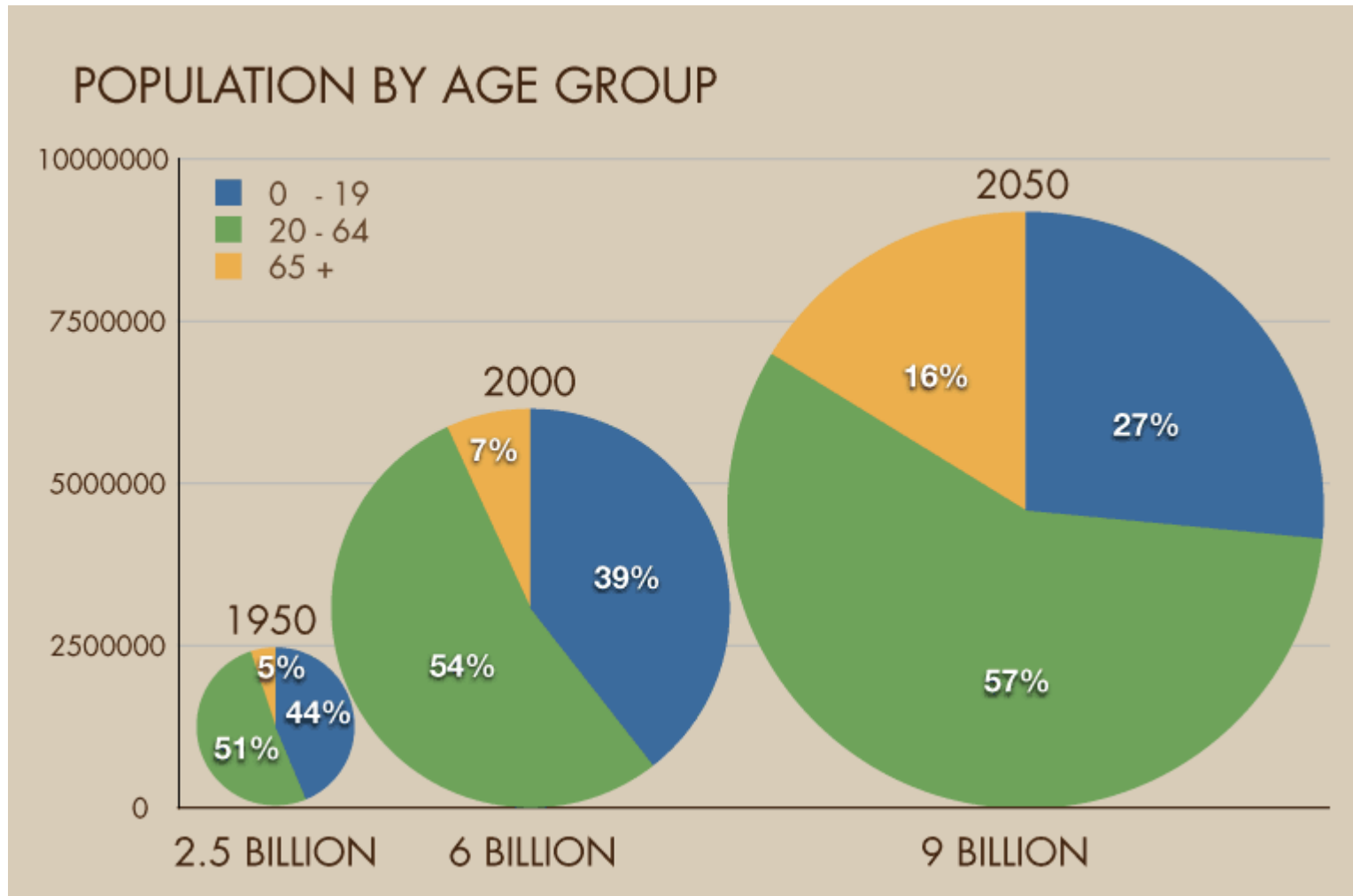


Global income growth from 1988 to 2008

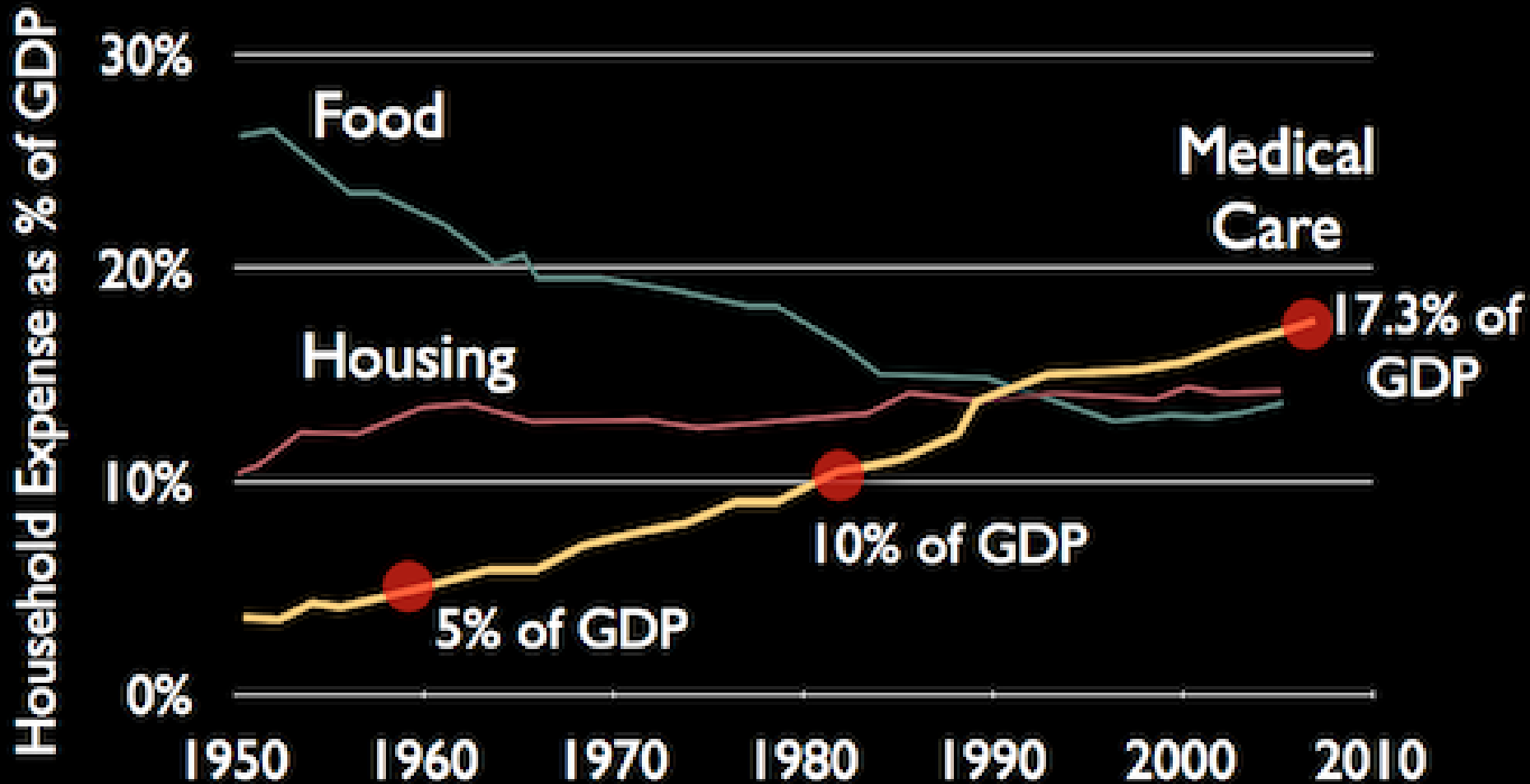


2. Tervis ja vananemine

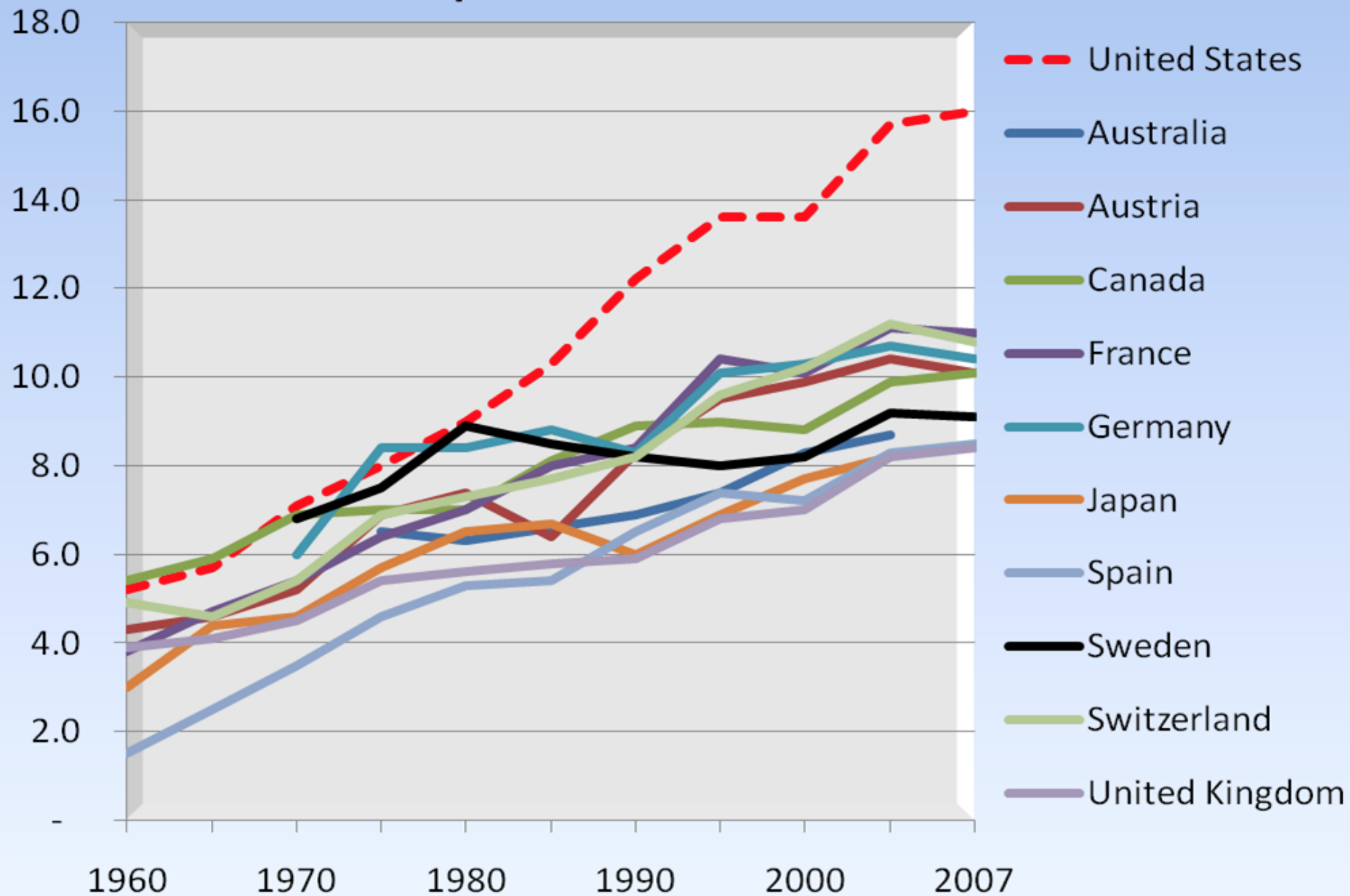
Elanikkonna vananemine



Household Expense Trends



Health expenditure trends as a % of GDP



Probleem ei kao kuhugi ..

National Health Expenditures as a Share of GDP, 1980-2040

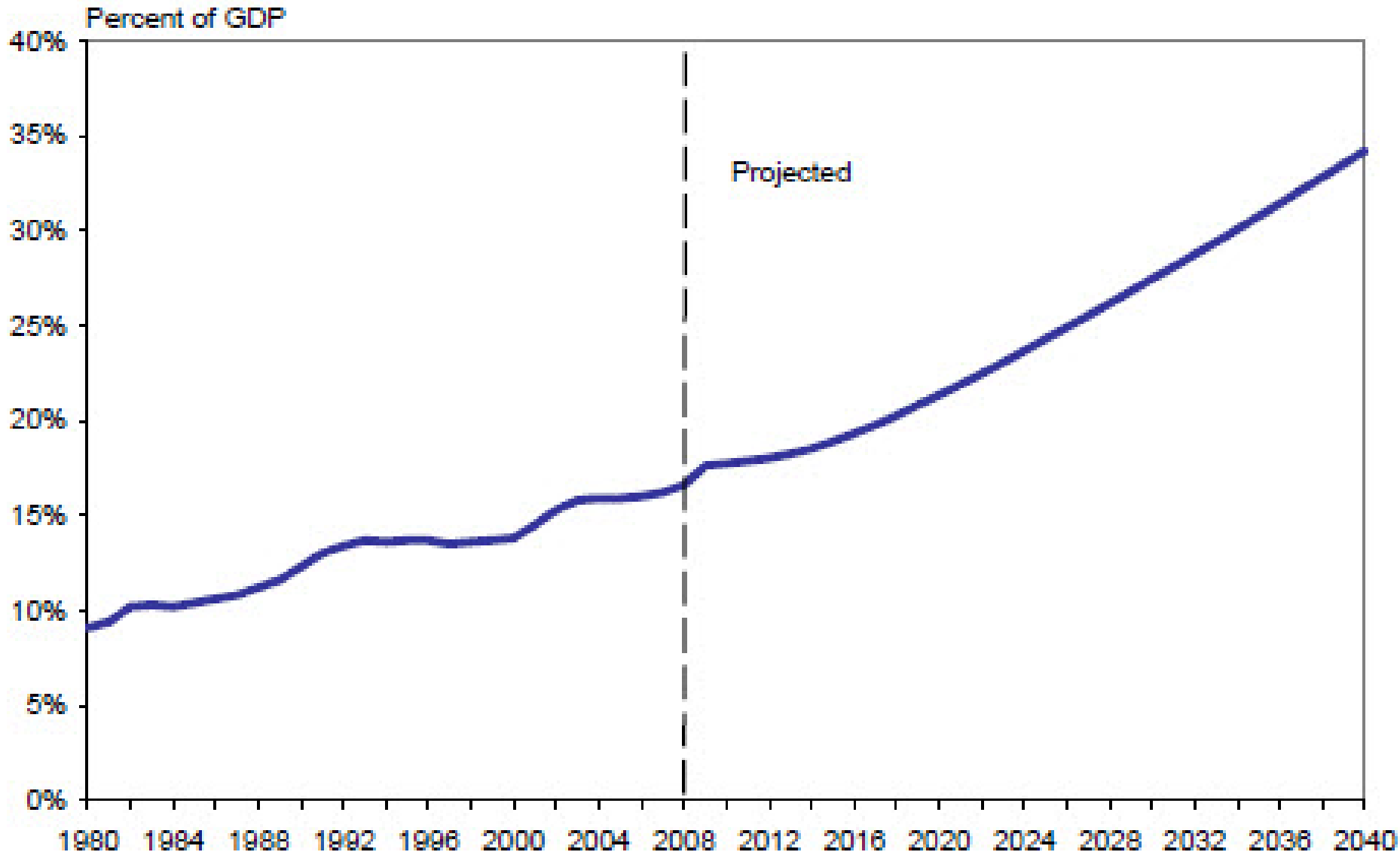
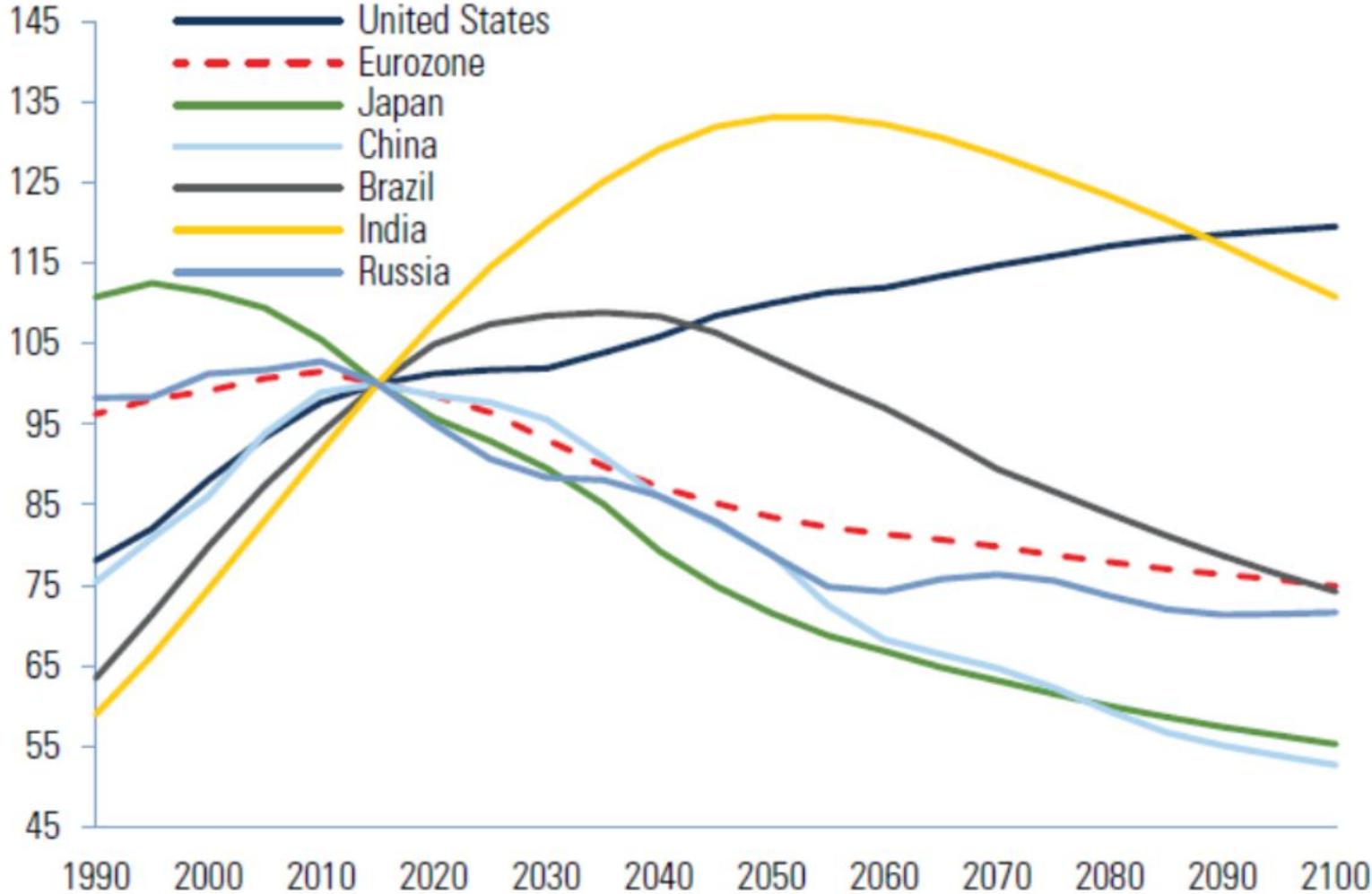


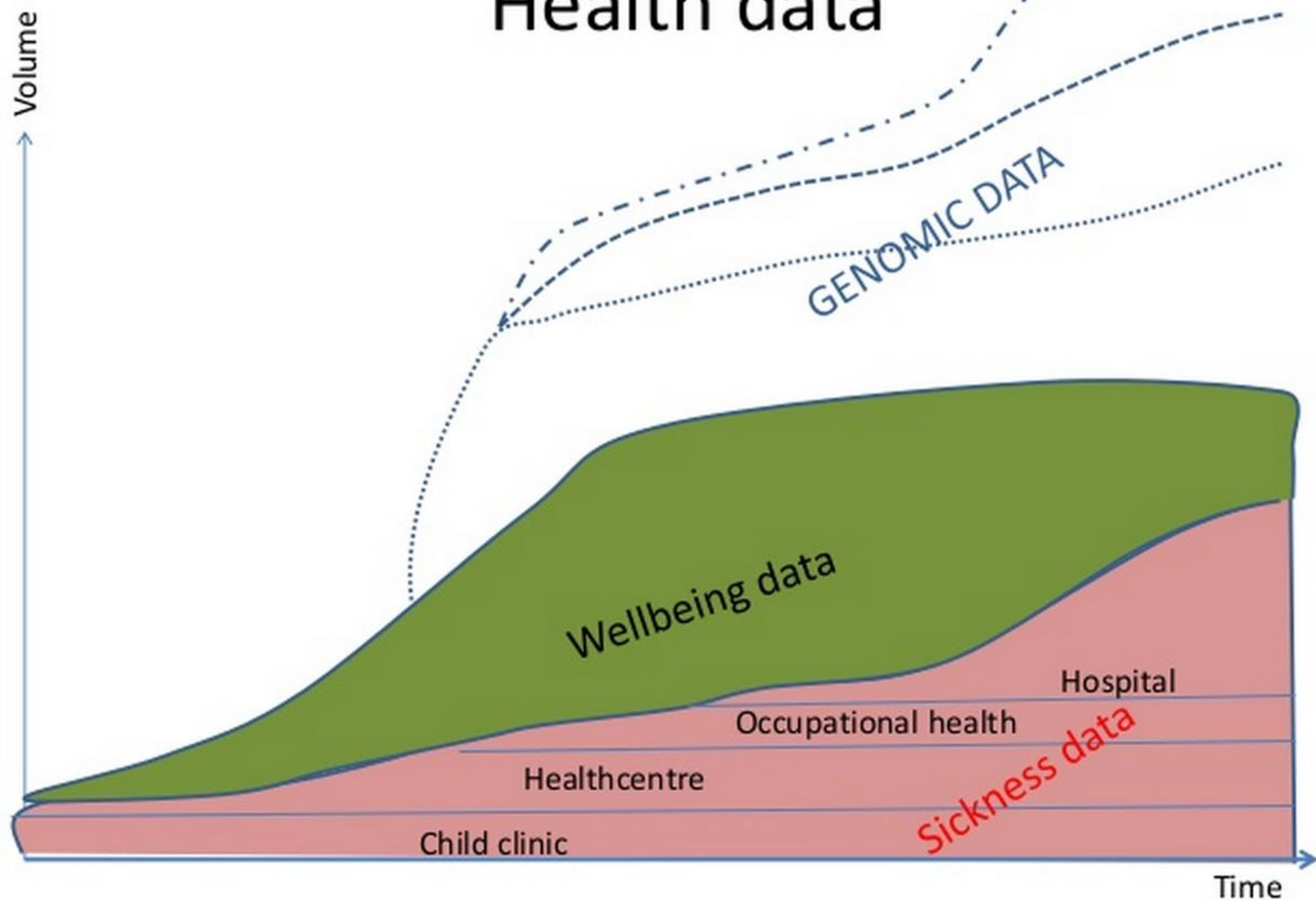
Chart 6: Long term working-age population projections

2015 = 100



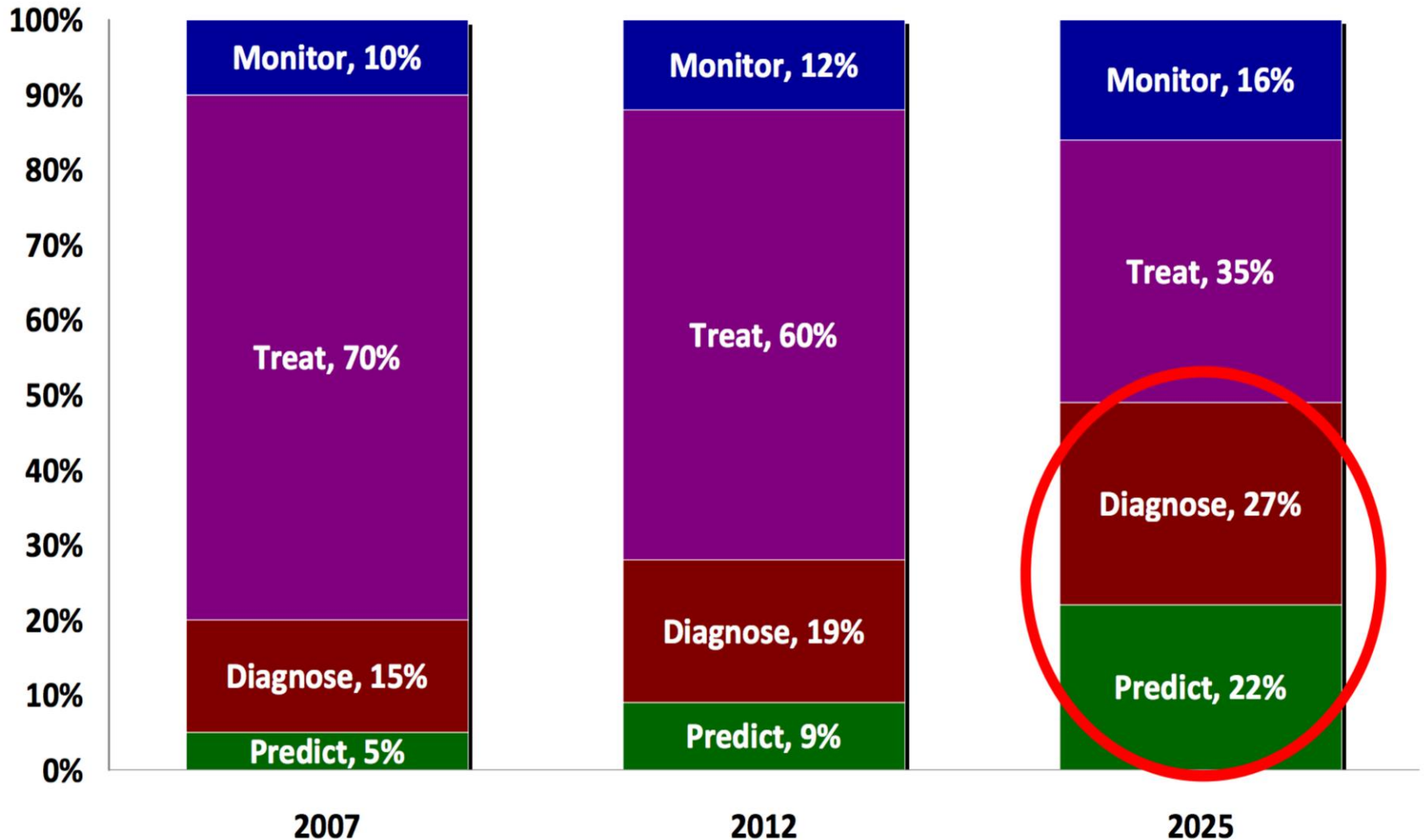
Source: Goldman Sachs Investment Management, United Nations

Health data

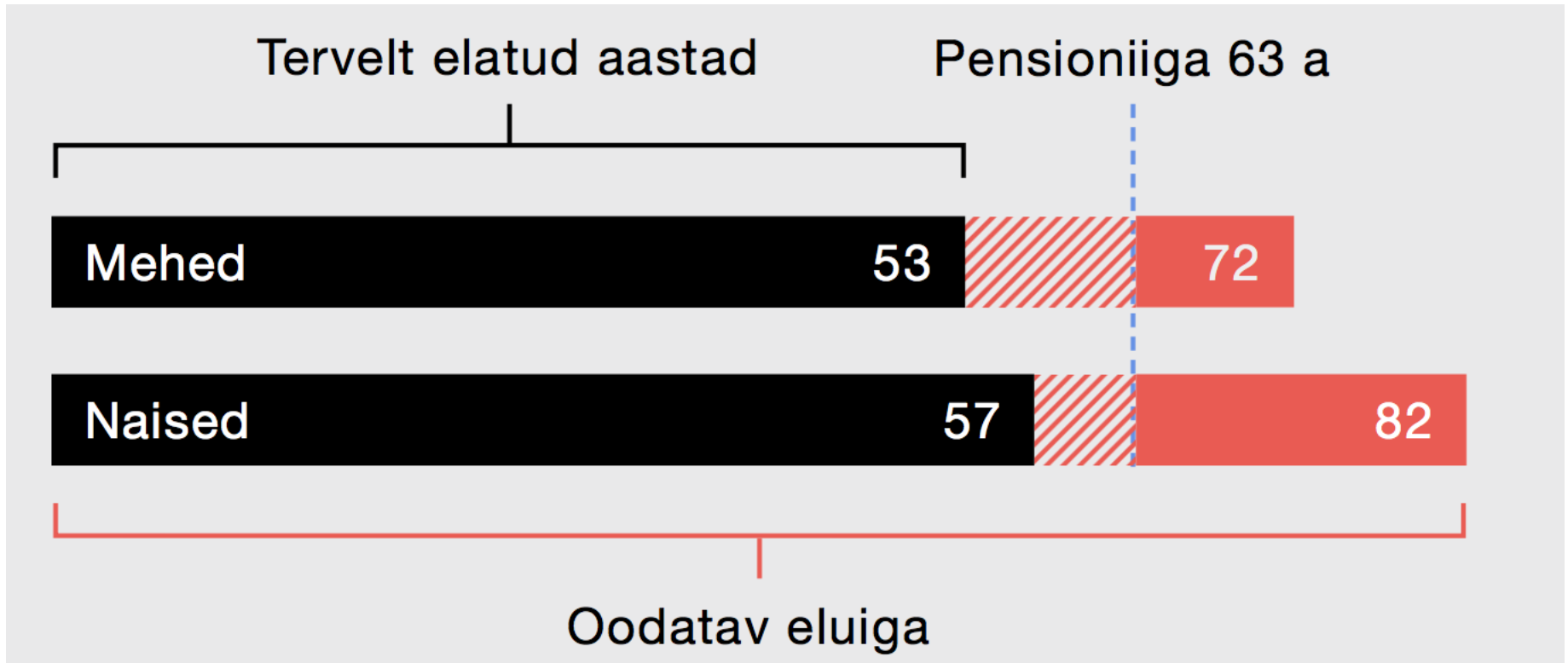


E-tervis

Healthcare Spending by Type of Activity



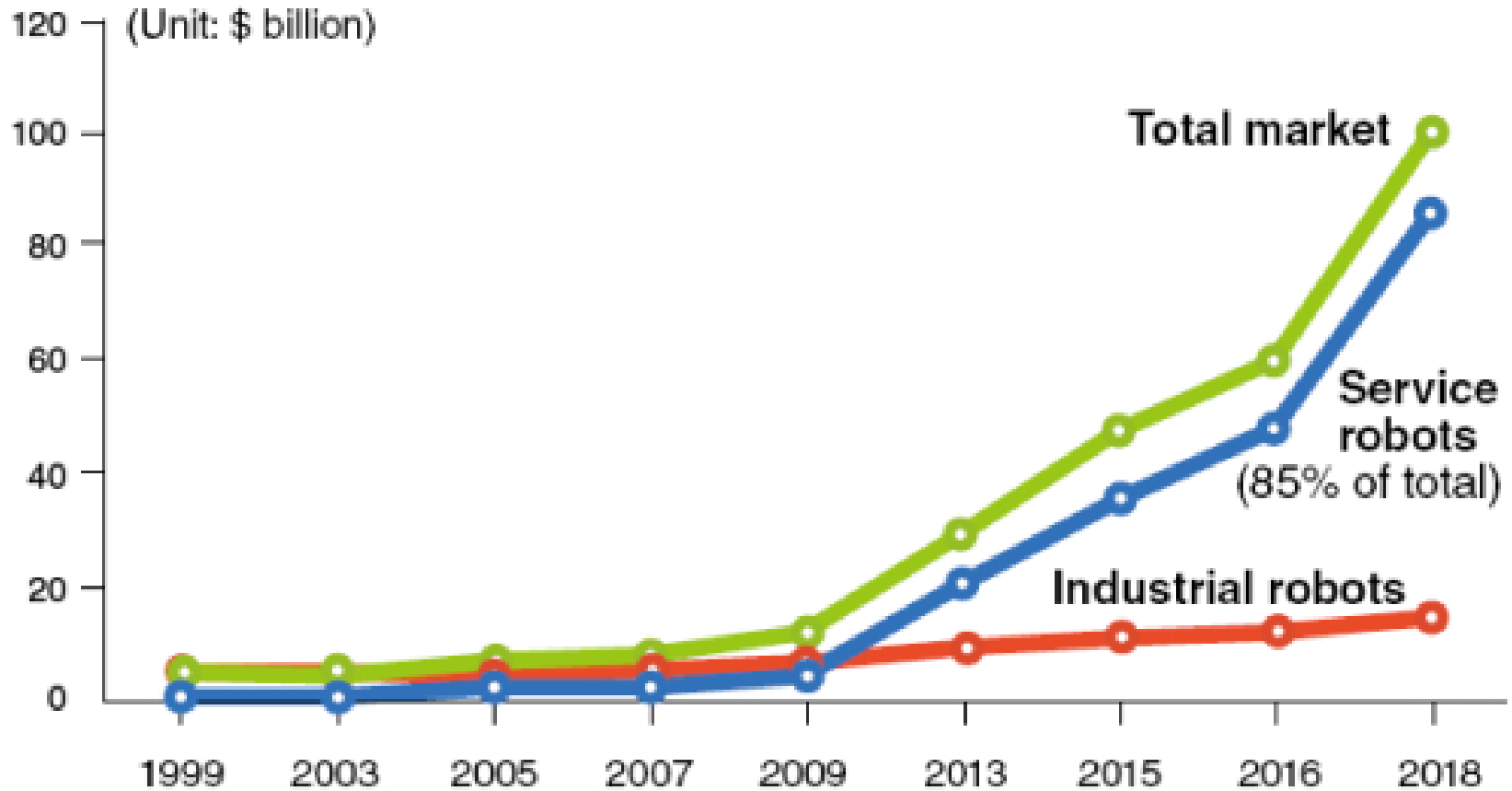
Tervelt elatud aastad



3. Tehnoloogiad

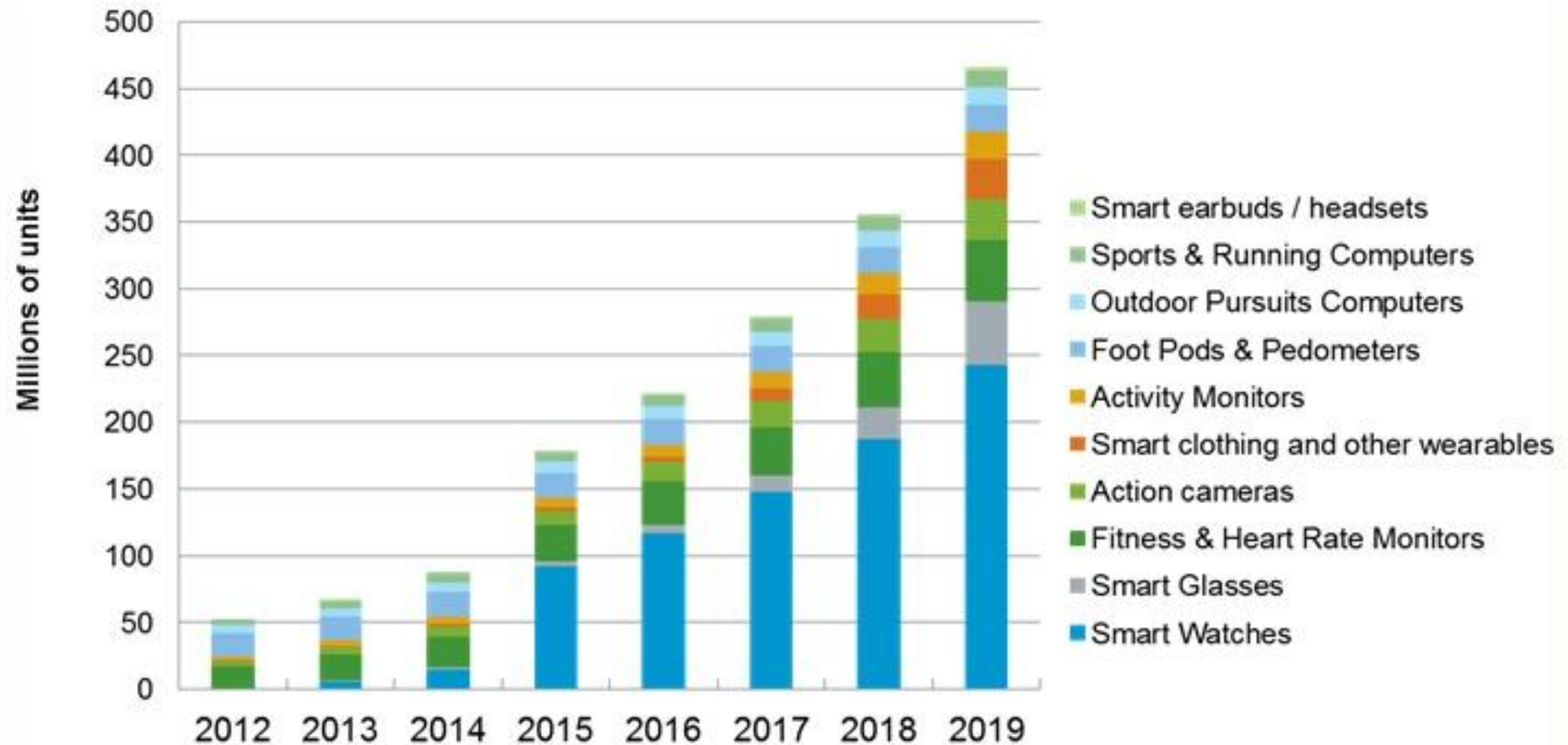
Robotite kasv

Global robot market outlook



Sensorite kasv

MEMS and sensor shipments for wearable device

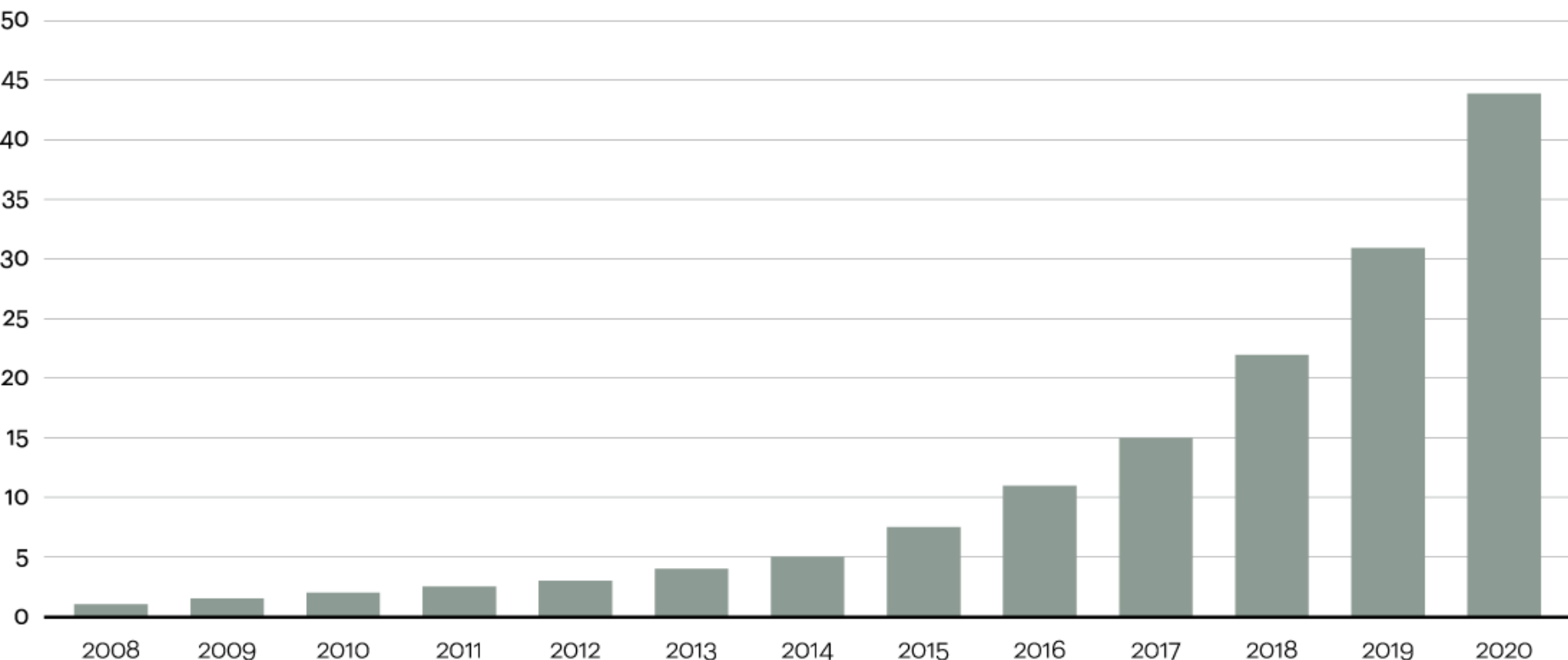


Andmete kasv 40% aastas

Figure 1

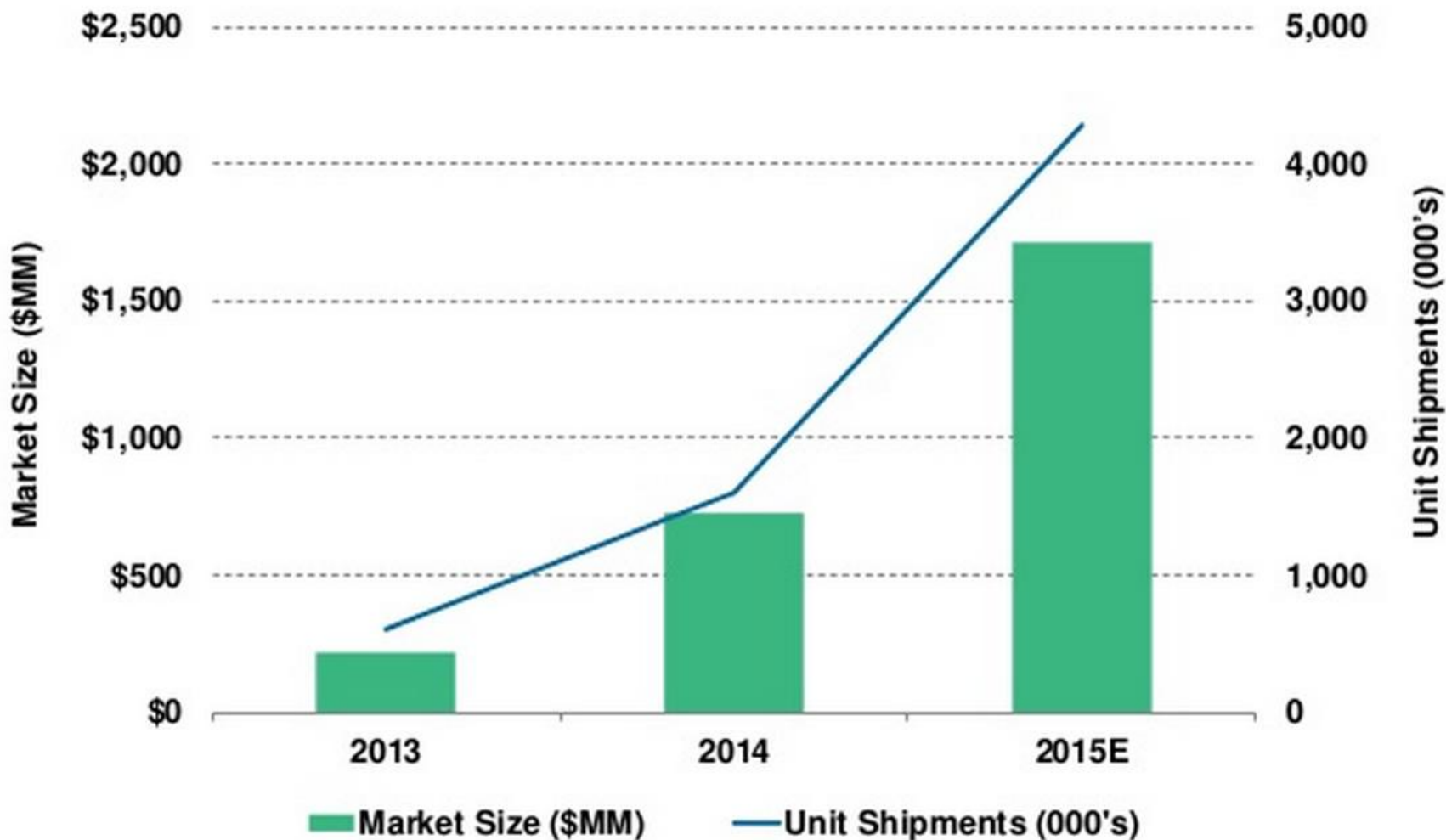
Data is growing at a 40 percent compound annual rate, reaching nearly 45 ZB by 2020

Data in zettabytes (ZB)

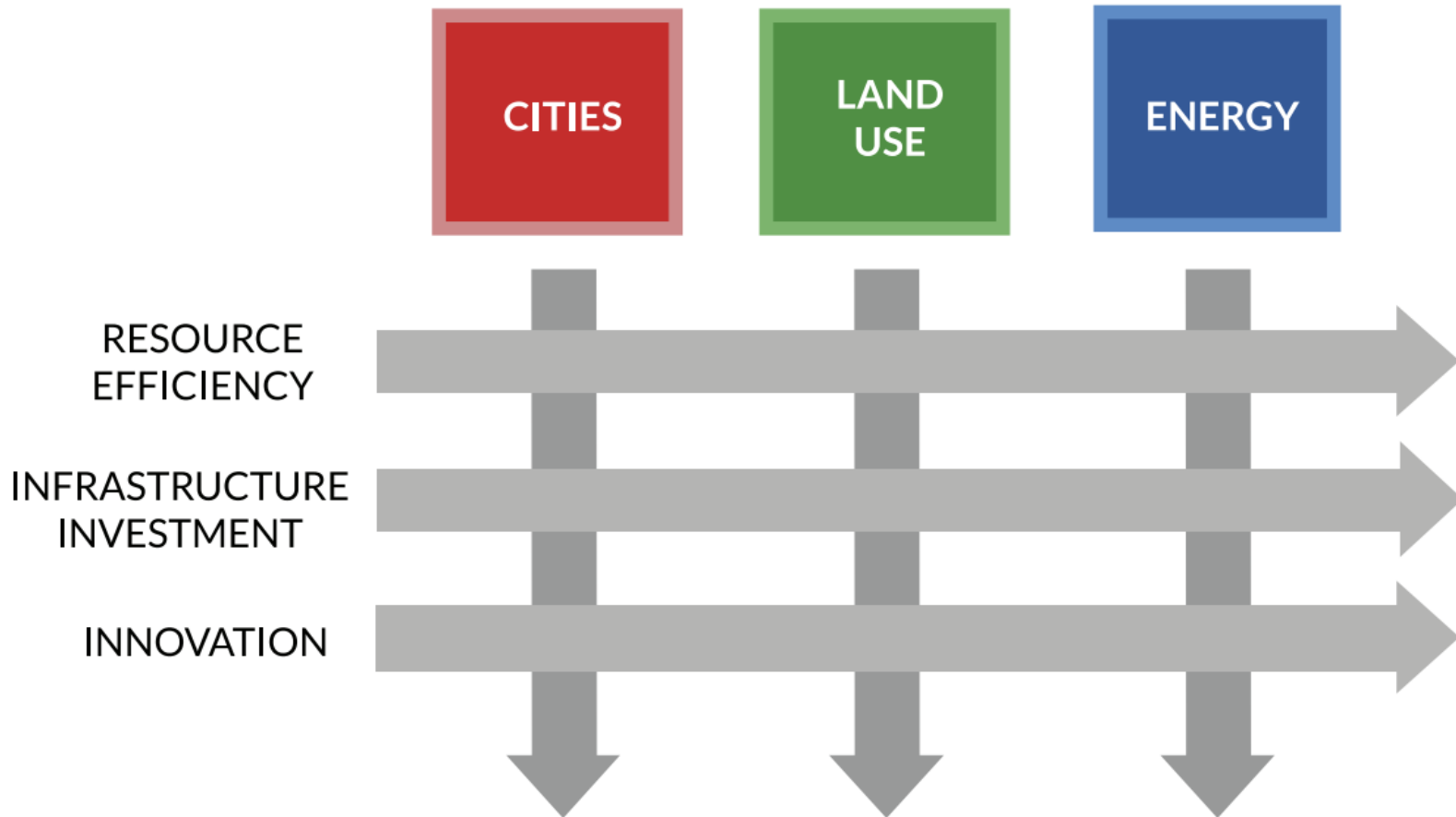


Droonide kasv +167% aastas

Global Consumer Drones – Revenue & Unit Shipments, 2013 – 2015E



Muutuv maailm



ATLANTA'S BUILT-UP AREA



POPULATION:

2.5 MILLION

URBAN AREA:
TRANSPORT

4,280 KM²

CARBON EMISSIONS:
TONNES CO₂ PER PERSON
(PUBLIC + PRIVATE
TRANSPORT)

7.5

BARCELONA'S BUILT-UP AREA



POPULATION:

2.8 MILLION

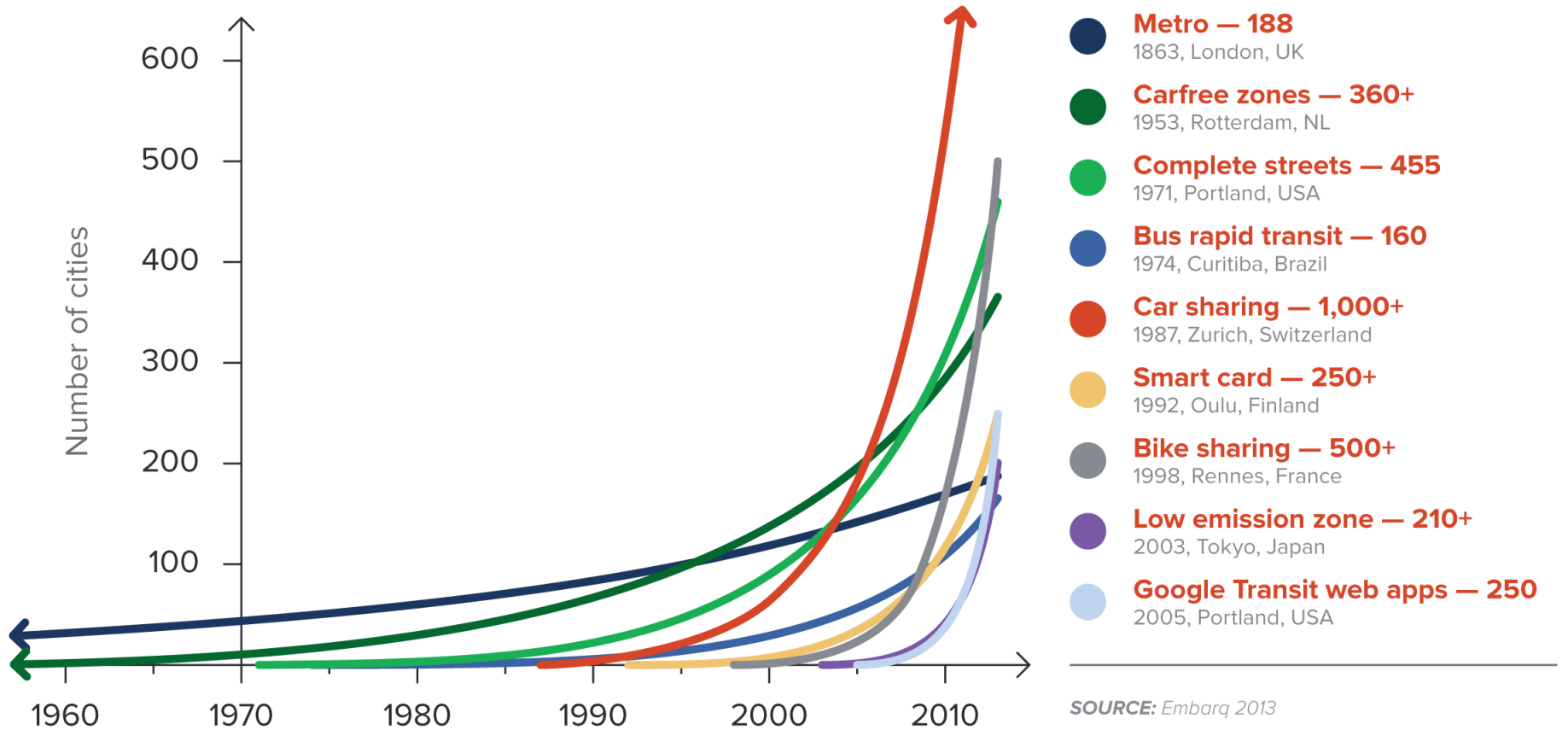
URBAN AREA:
TRANSPORT

162 KM²

CARBON EMISSIONS:
TONNES CO₂ PER PERSON
(PUBLIC + PRIVATE
TRANSPORT)

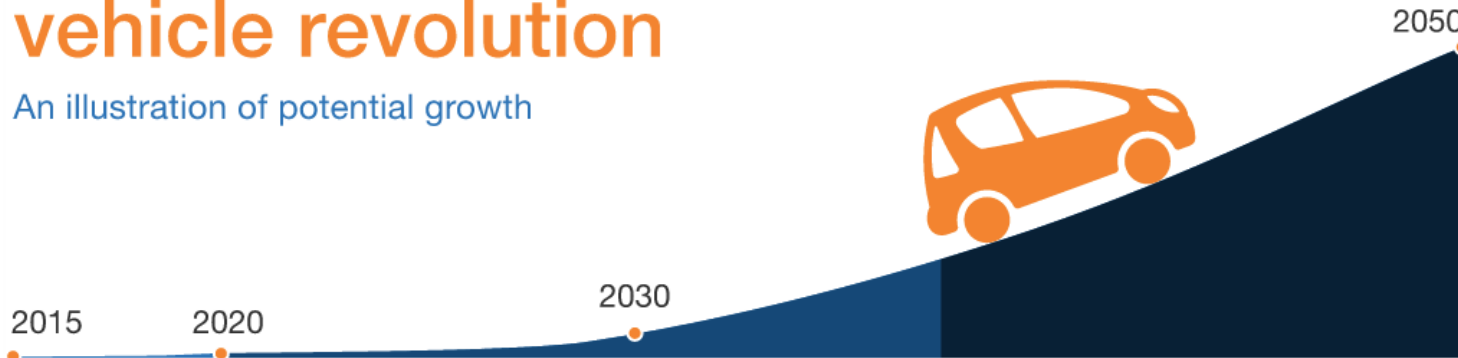
0.7

Uued lahendus linnades



The self-driving vehicle revolution

An illustration of potential growth



Era 1:
Fully autonomous vehicles (AVs) being developed for consumers

- 1 AVs are already a reality in industrial fleets
- 2 Car OEMs begin to assess strategic impact
- 3 New mobility models begin to emerge

Era 2:
Consumers begin to adopt AVs

- 4 The after-sales service landscape is reshaped
- 5 Insurers shift from covering individuals to covering technical failures
- 6 Supply chain and logistics are redefined

Era 3:
AVs become the primary means of transport

- 7 AVs free up to 50 minutes a day for drivers
- 8 Parking space is reduced by billions of square meters
- 9 Vehicle crashes fall by 90%, saving billions of dollars
- 10 AV technology accelerates development of robots for consumer use

Autovabad linnad?

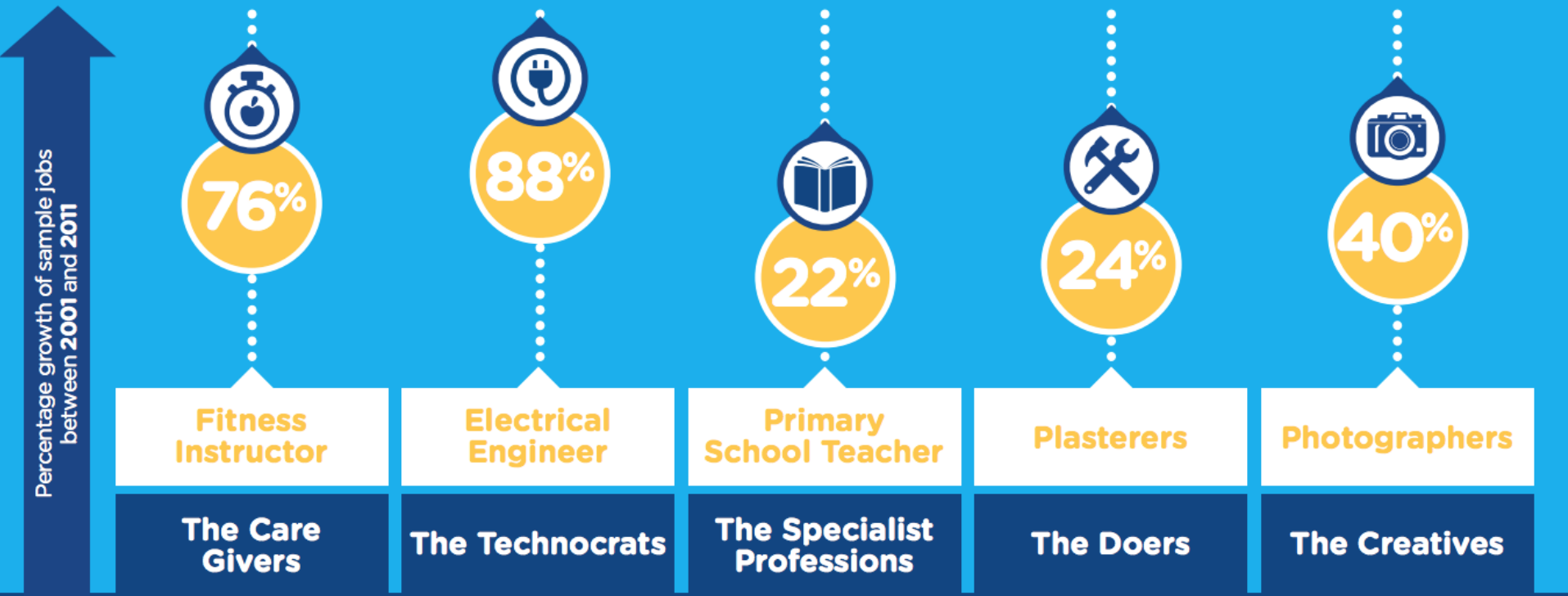
- 96% ajast seisavad autod tühjal
- OECD – isesõitvad autod vähendaks autode vajadust 80%
- 94% autoõnnetustest on inimeste põhjustatud





Tuleviku töökohad

Connectivity is the common thread: The five skill sets for future jobs



The Changing Nature of Work & Learning

jarche.com

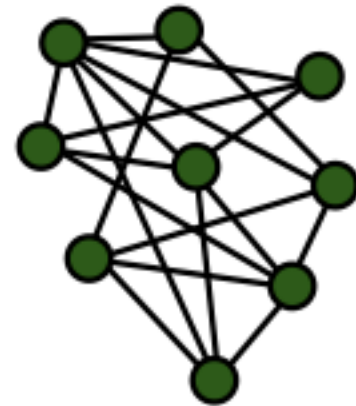
~19th C



+/- 20th C



21st C



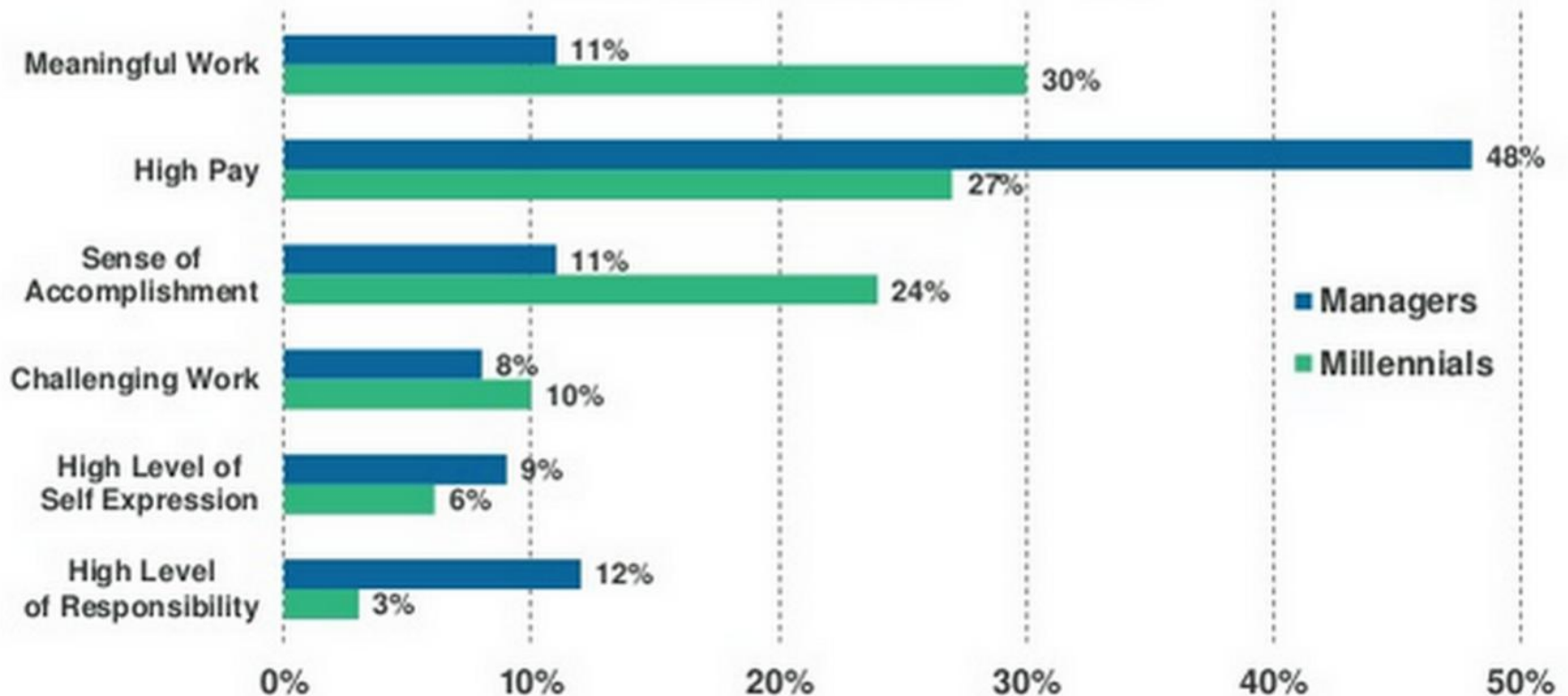
Artisans - Corporations - Networks

Apprenticeship - Training - SoLoMo

Noorte jaoks töö tähtsus olulisem kui raha

Most Important Thing to Millennials = Meaningful Work
What Managers Think Is Most Important Thing to Millennials = Money

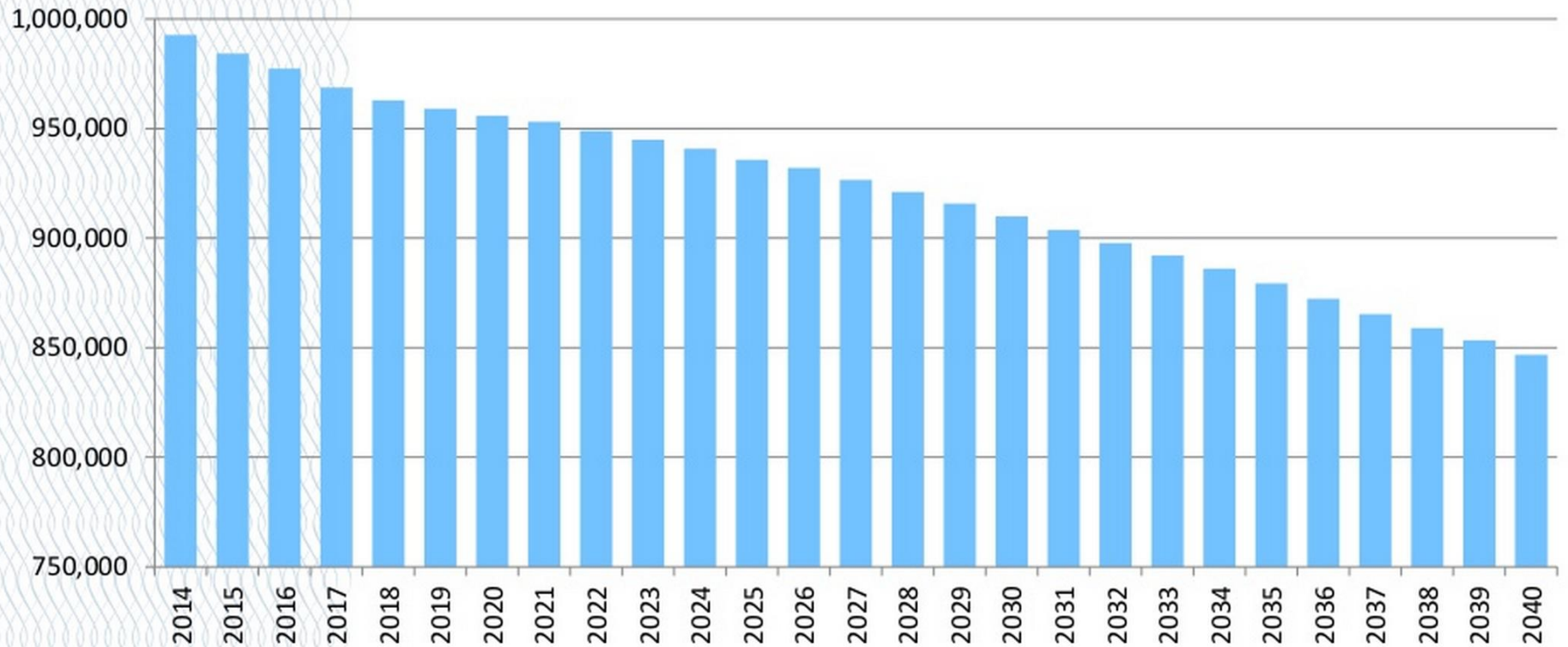
Managers' and Millennials' View of the Most Important Factor That Indicates Career Success to Millennials



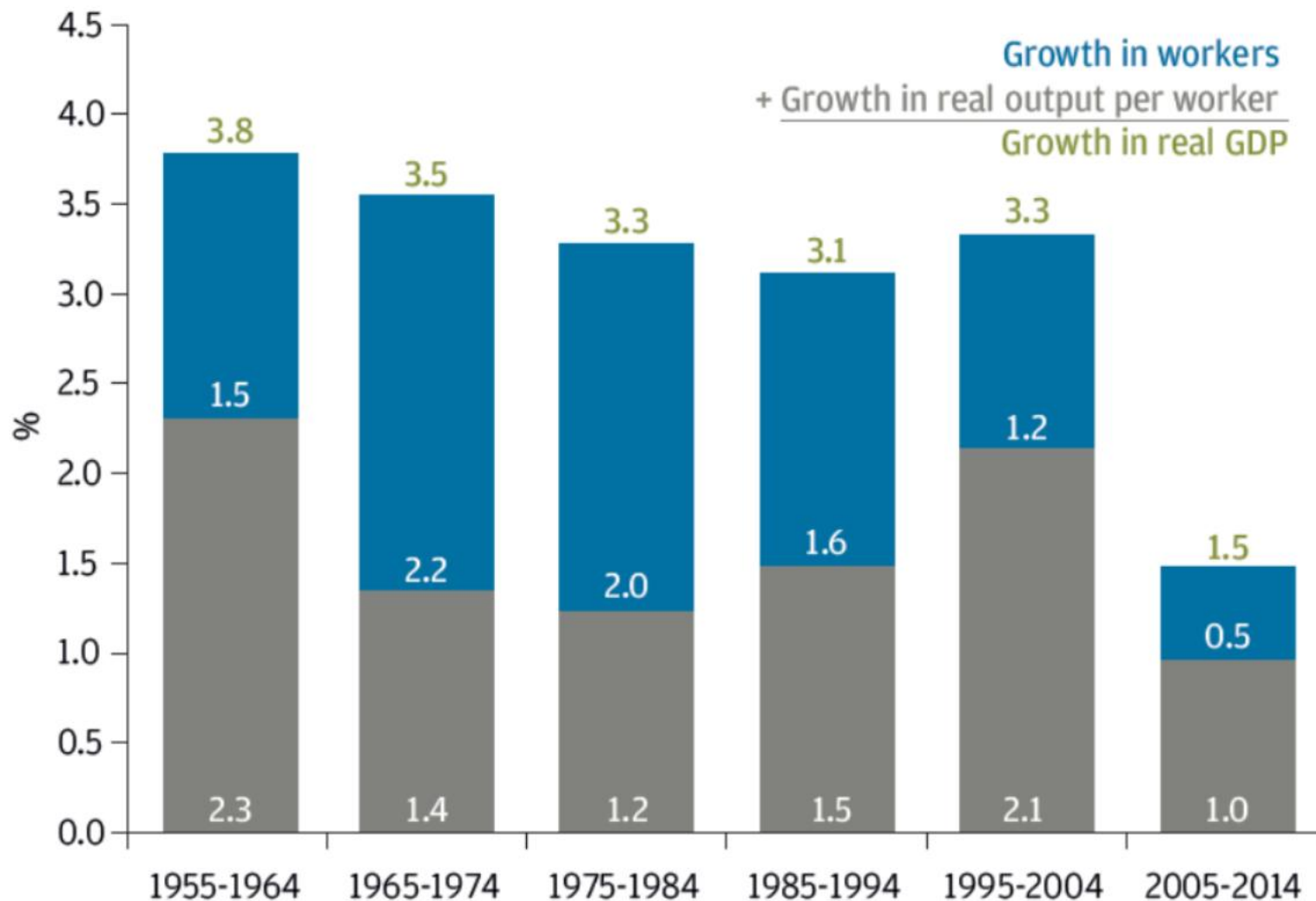
4. Eesti

Rahvastikuprognosis

Töealise elanikkonna rahvastikuprognosis



USA majanduskasv – töötajate arvu kasv + tootlikkuse kasv



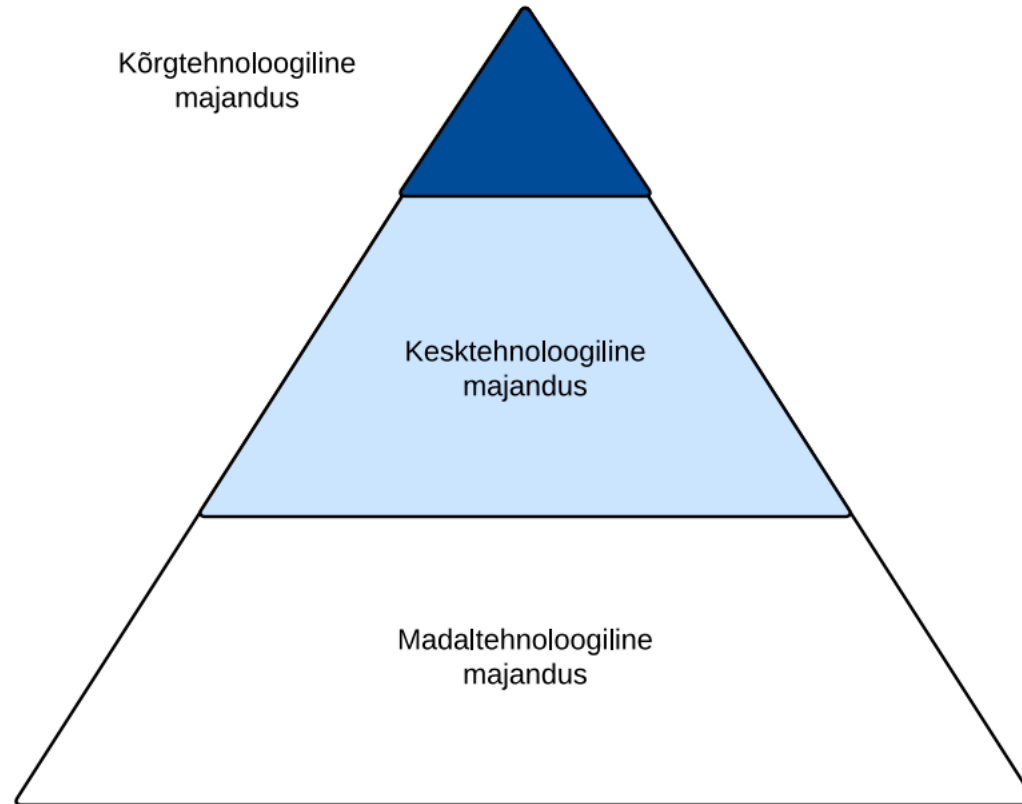
351

AVERAGE WEALTH PER ADULT (IN 1000 USD)

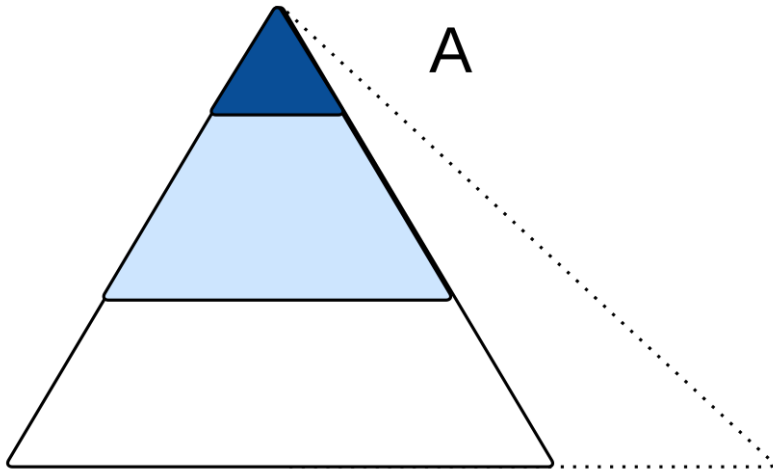
(SOURCE: CREDIT SUISSE 2015)



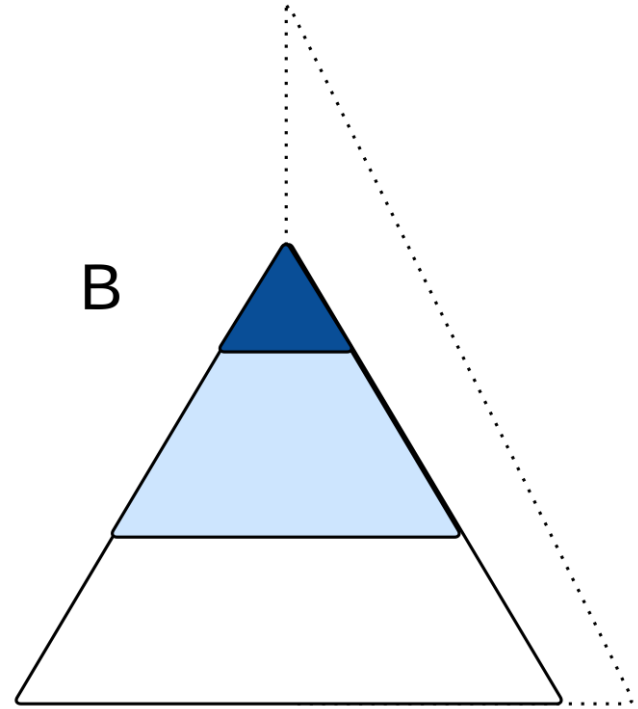
Majanduse tänane struktuur



Maianduse struktuur tulevikus?

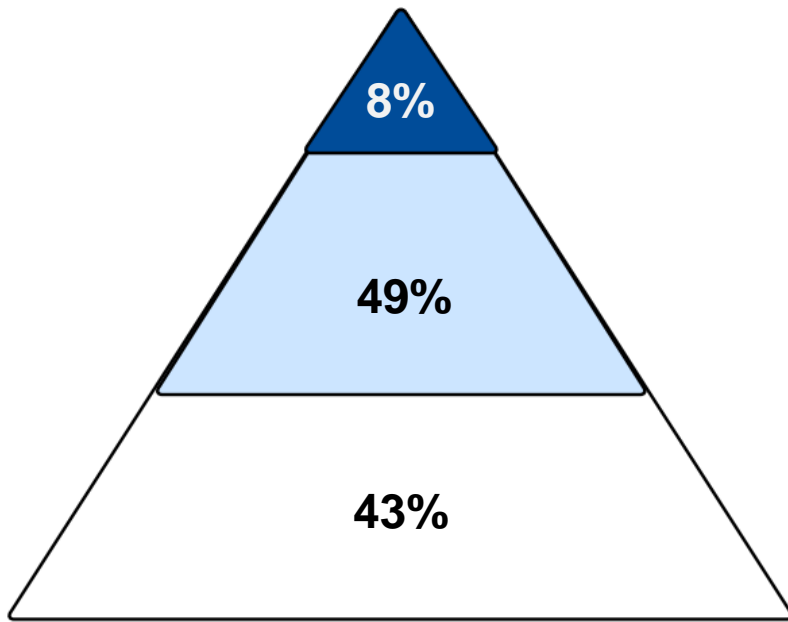


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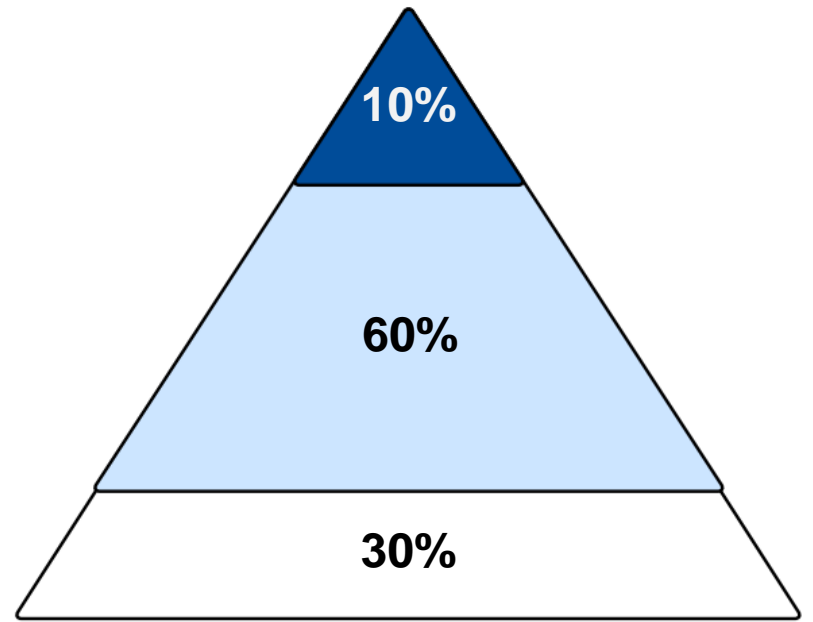


B

Eesti vs Soome



Eesti

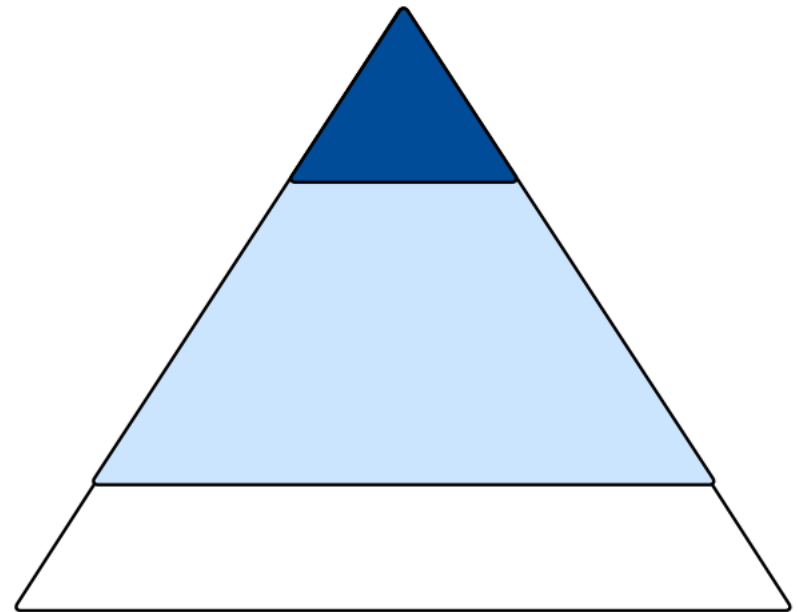


Soome

Eesti vs Soome (mahud, 10x)



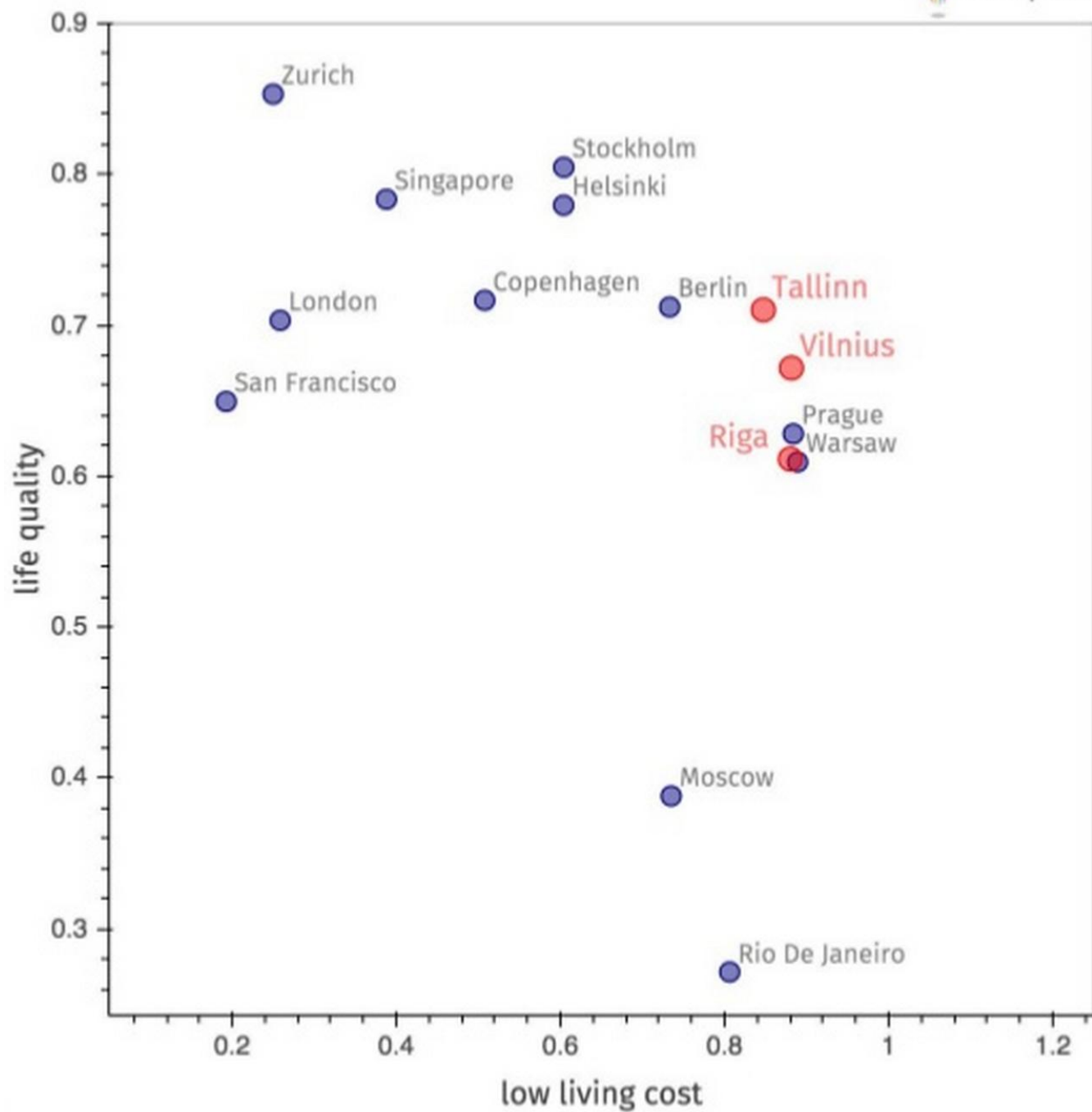
Eesti

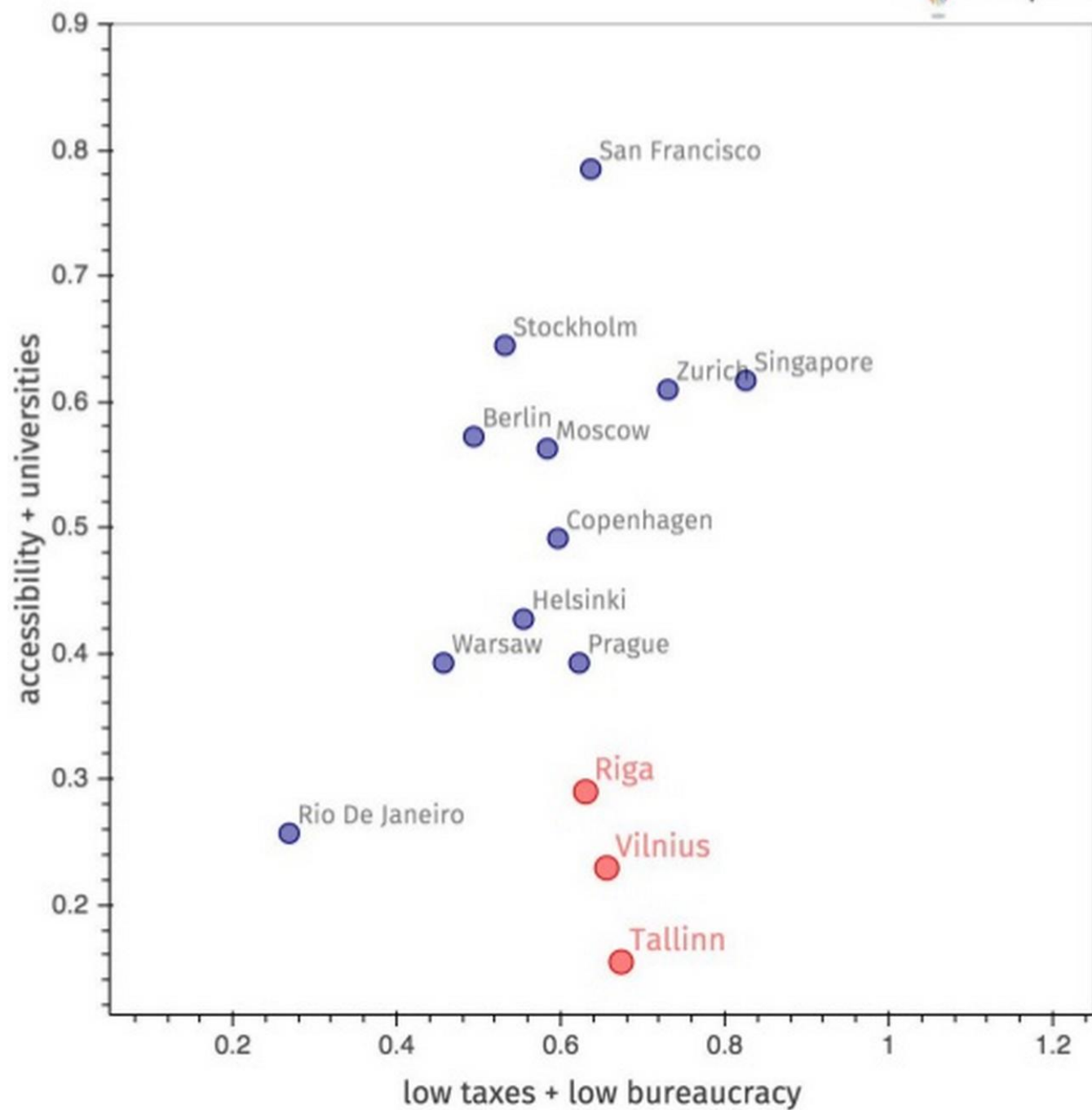


Soome

REALITY: ALL GOVERNMENTS COMPETING FOR EVERY CITIZEN





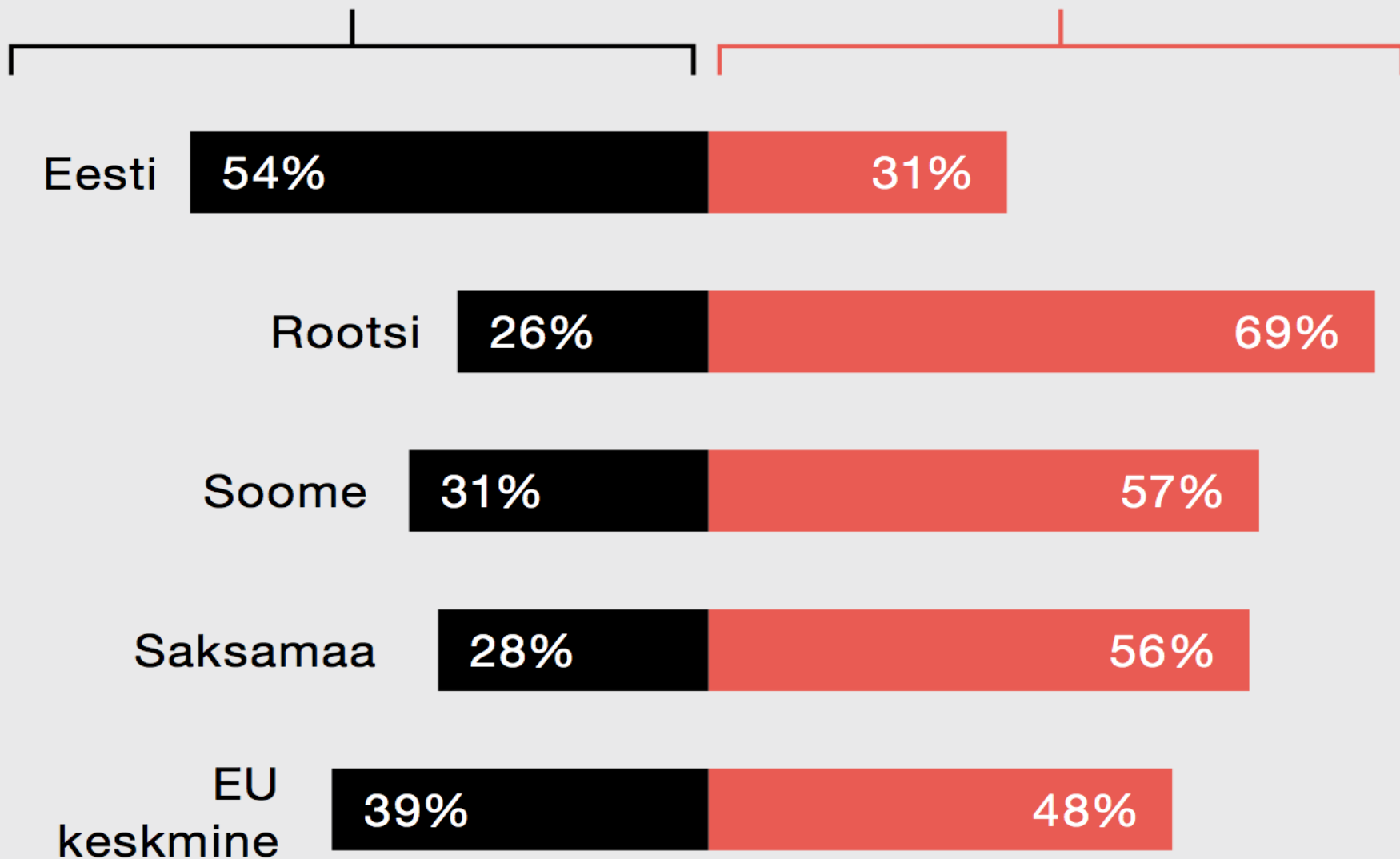


TEADLASTE JA INSENERIDE HÕIVE KÕRGHARIDUSSEKTORIS

2013

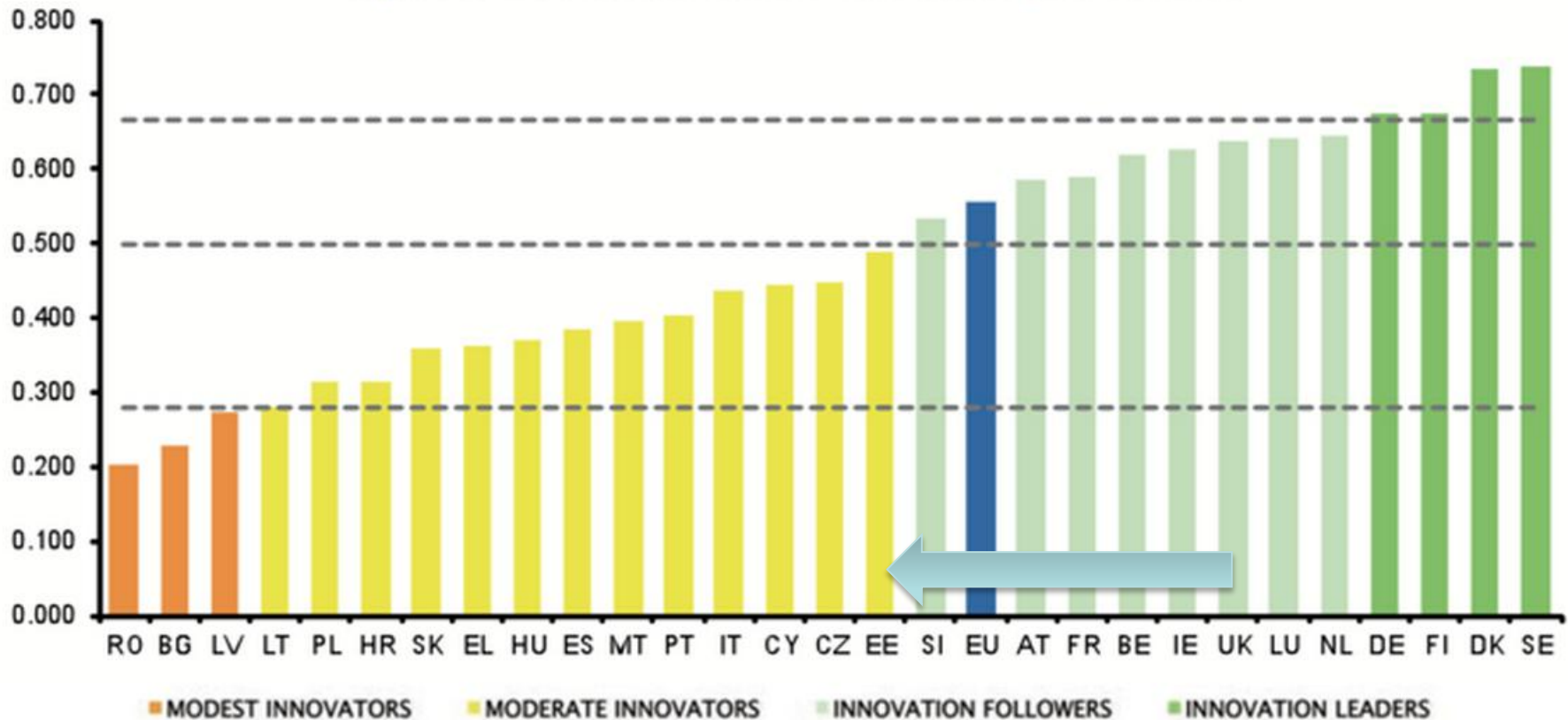
TEADLASTE JA INSENERIDE HÕIVE ETTEVÕTLUSES

2013



Innovation union scoreboard index

Figure 1: EU Member States' innovation performance



Miks Eesti positsioon on nõrgenenud?

	Inim-ressurss	Teadus-süsteem	Kapital	Ettevõtete investeringud	Võrgustikud ja ettevõtlikkus	Intellektuaal-omand	Innovaatorid	Majanduslikud mõjud
EL28	0,598	0,542	0,556	0,454	0,473	0,624	0,505	0,601
Eesti	0,597	0,370	0,837	0,614	0,465	0,596	0,375	0,374

Toote väärtusahel: soovitud tulevik

