

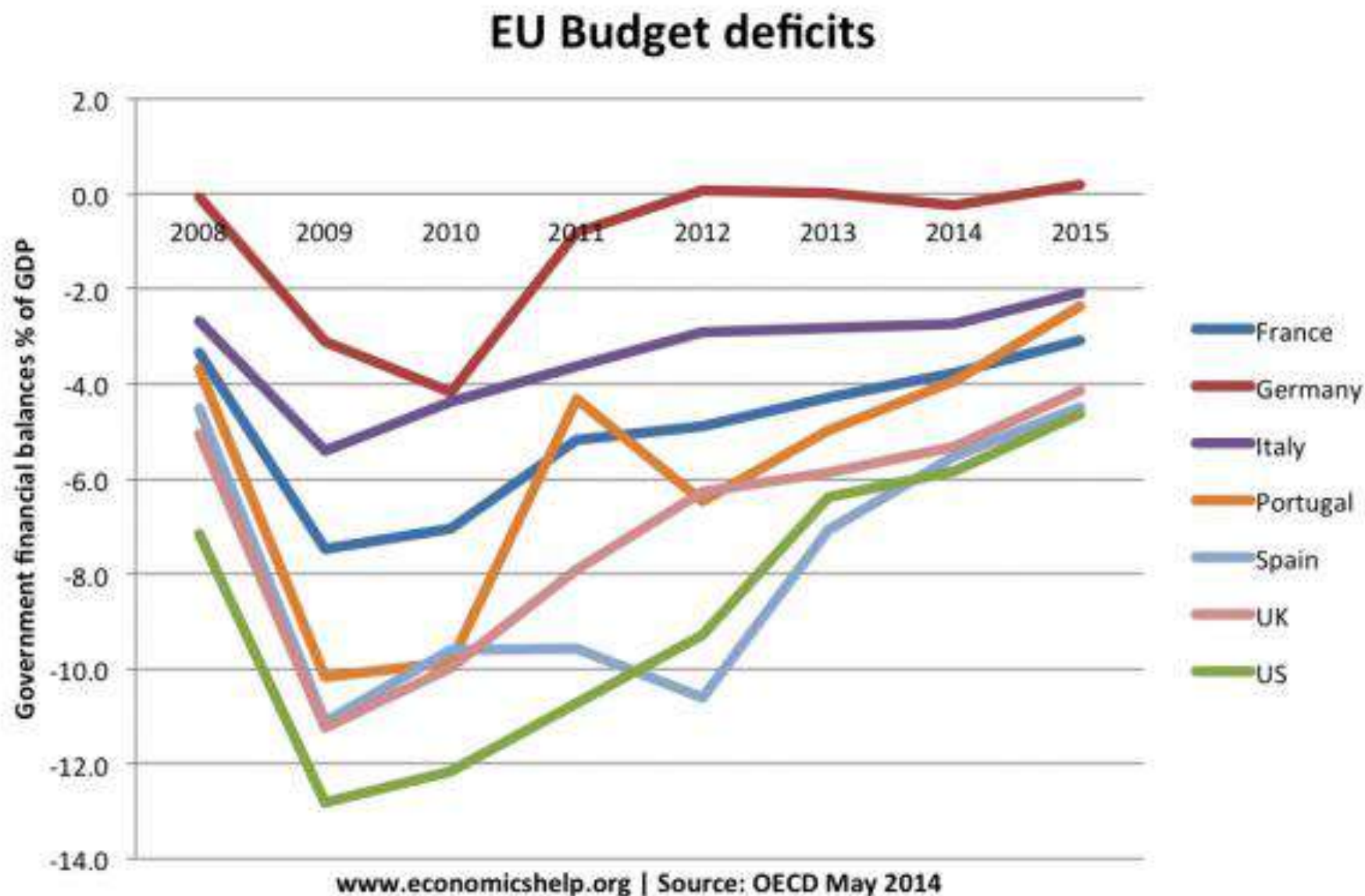
Eesti 2025 – kuidas on muutunud majanduskeskkond?

Kristjan Lepik

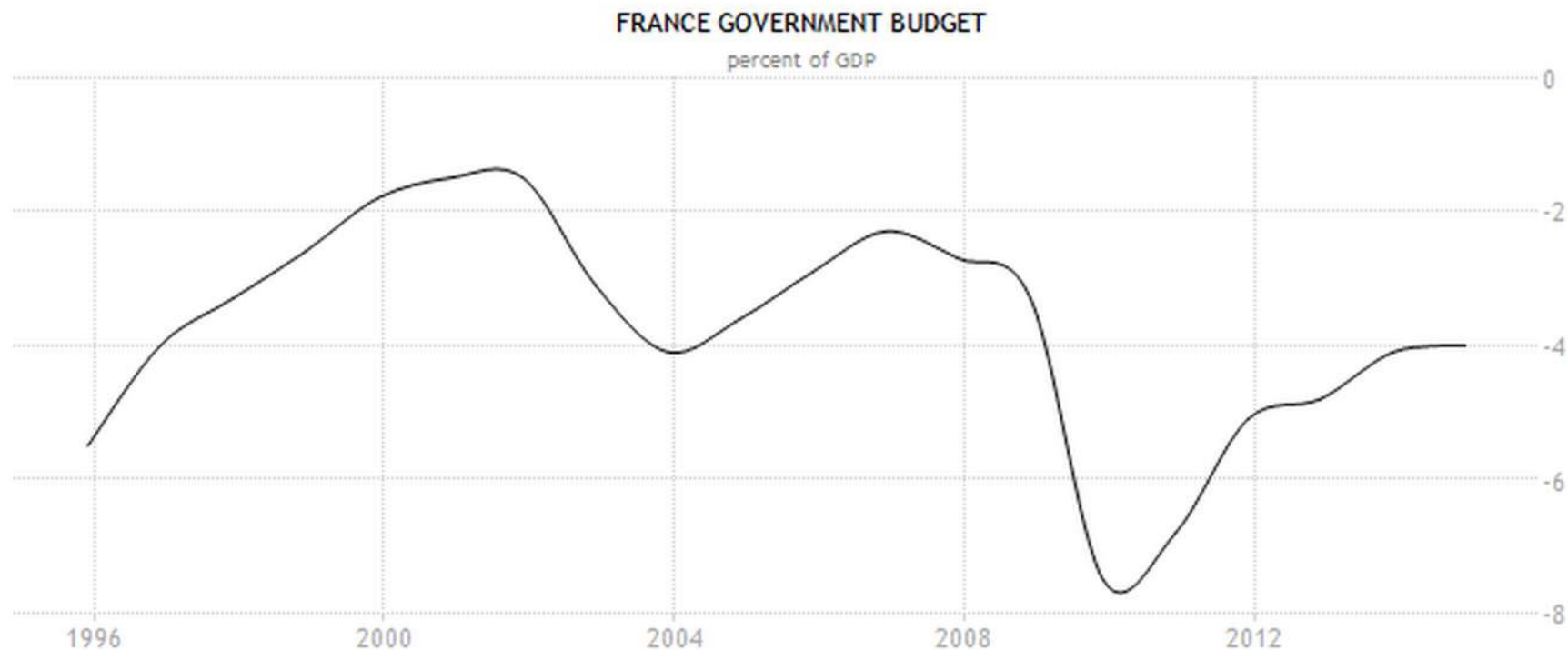
Veebruar 2016

1. Maailma majandus

Lääneriikide eelarved ikka punases

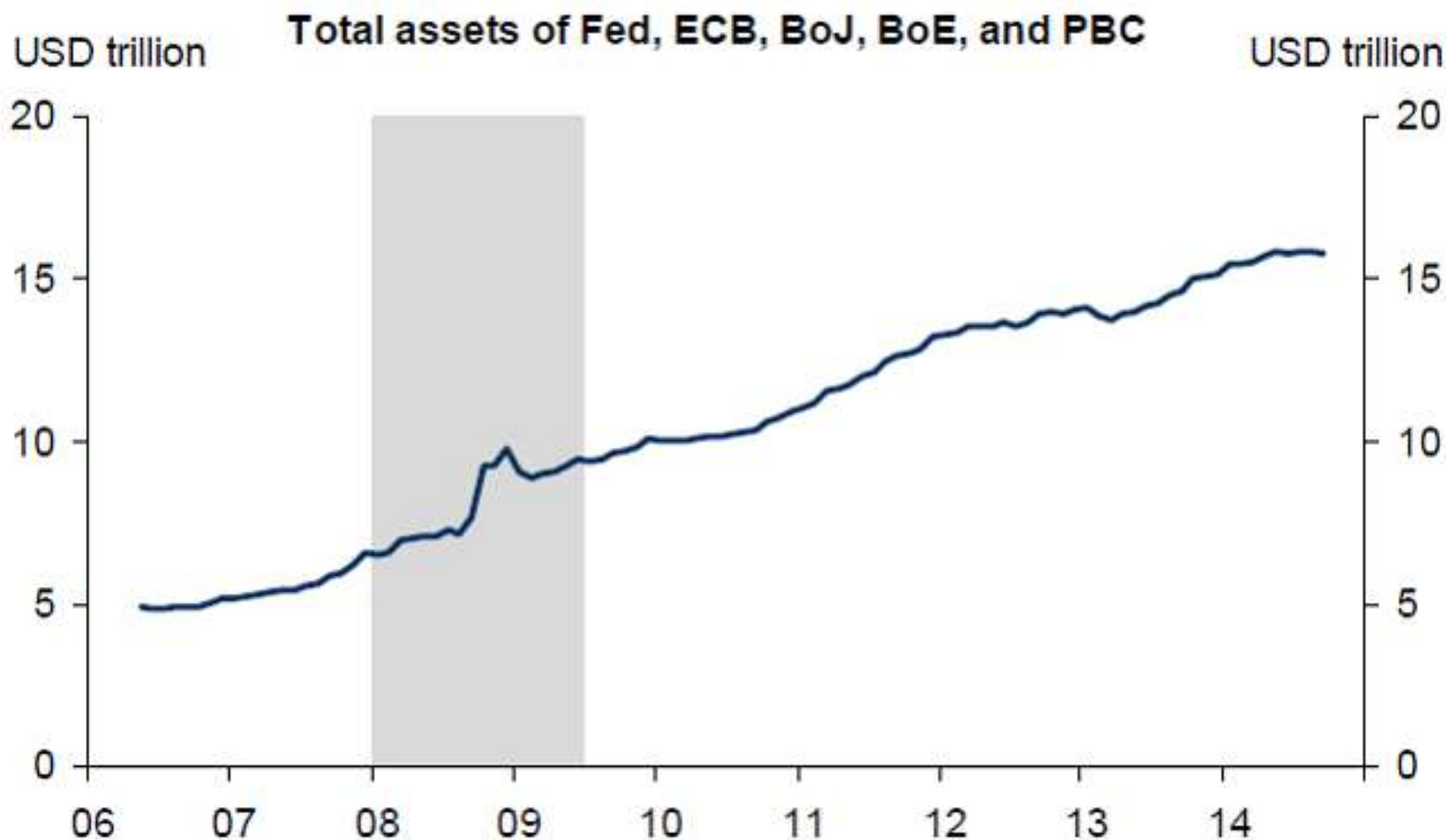


Prantsusmaa riigieelarve tasakaal



SOURCE: WWW.TRADINGECONOMICS.COM | EUROSTAT

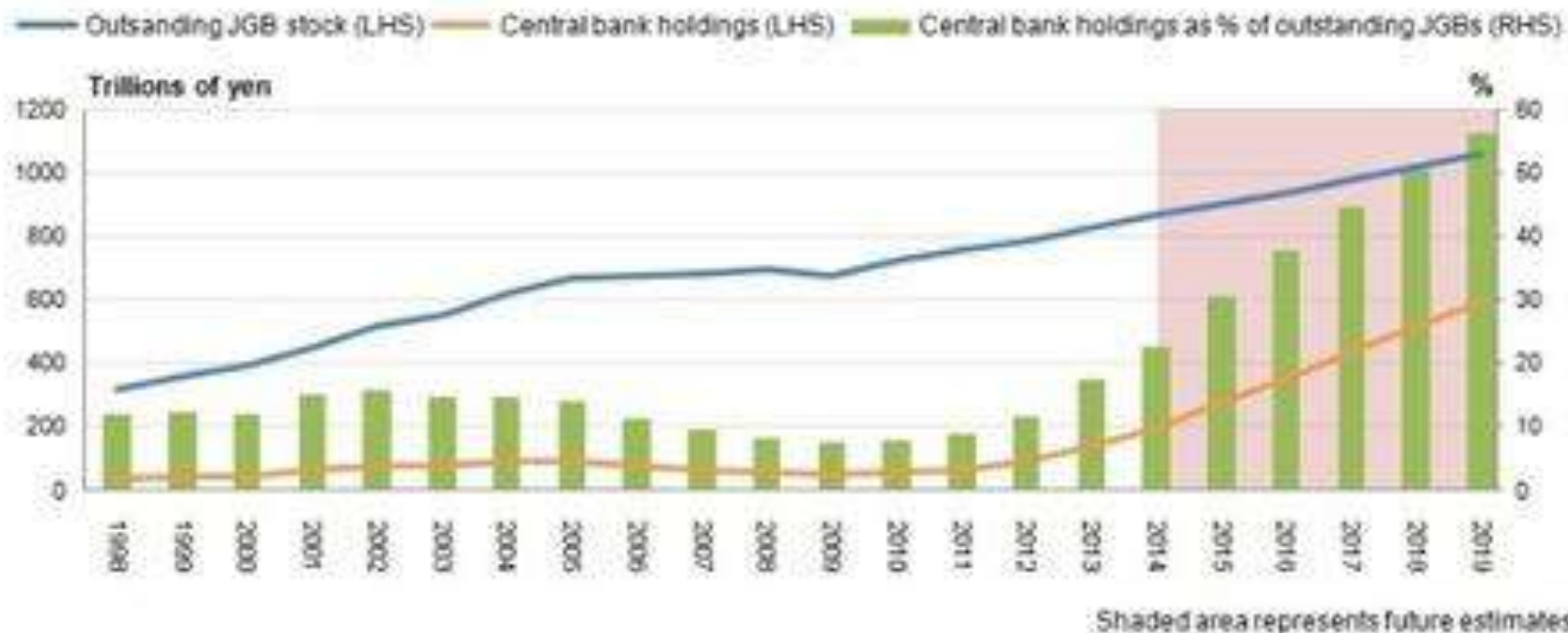
Central banks have printed more than \$10trn dollars since the crisis began



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

Jaapan – keskpanga sekkumine

BOJ's dominance of the bond market



Source: Bank of Japan, Datastream

Andy Mukherjee, Robyn Mak 05/11/2014

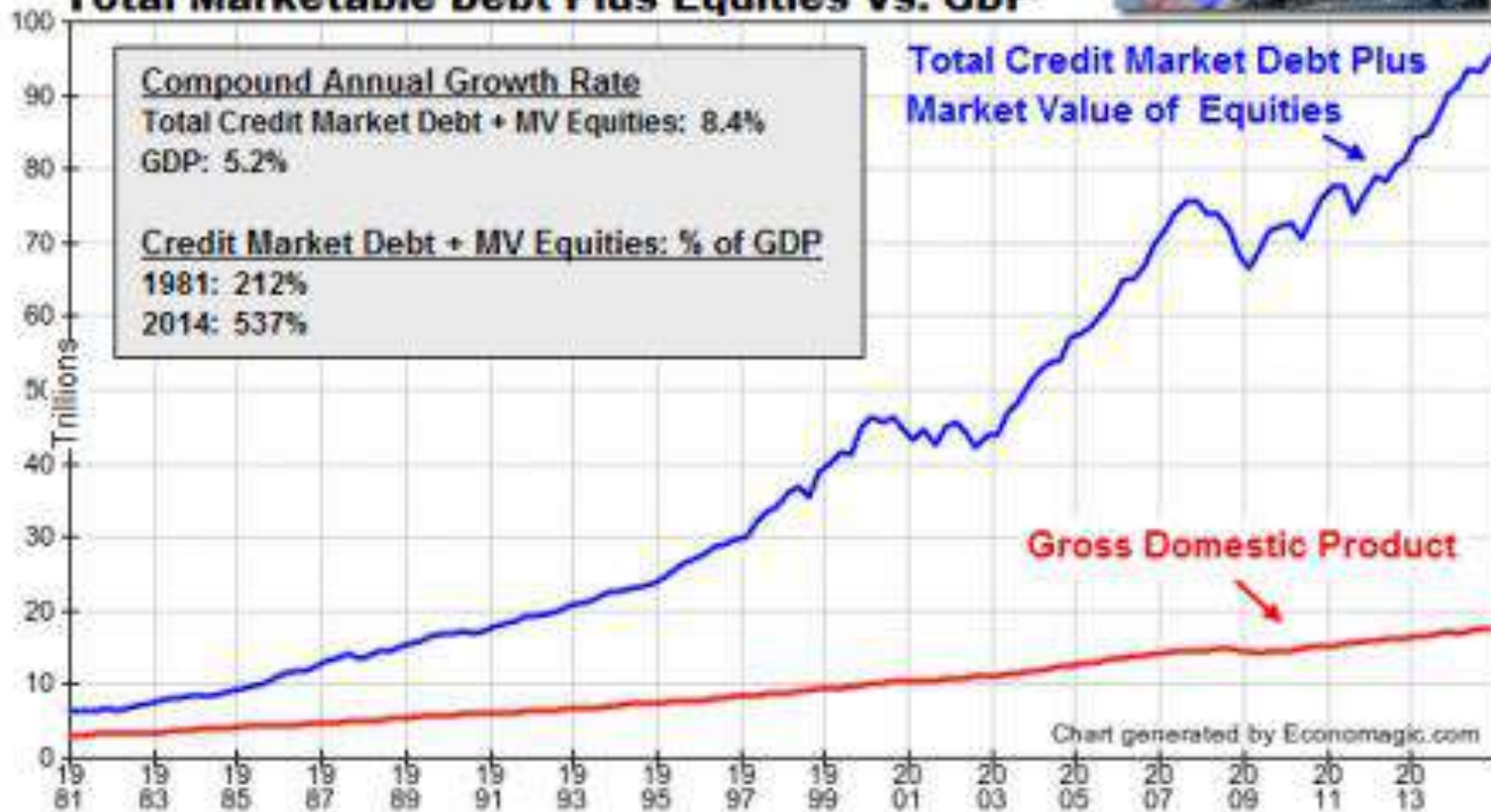


REUTERS BREAKINGVIEWS

Finantsurgude maht ja majandus

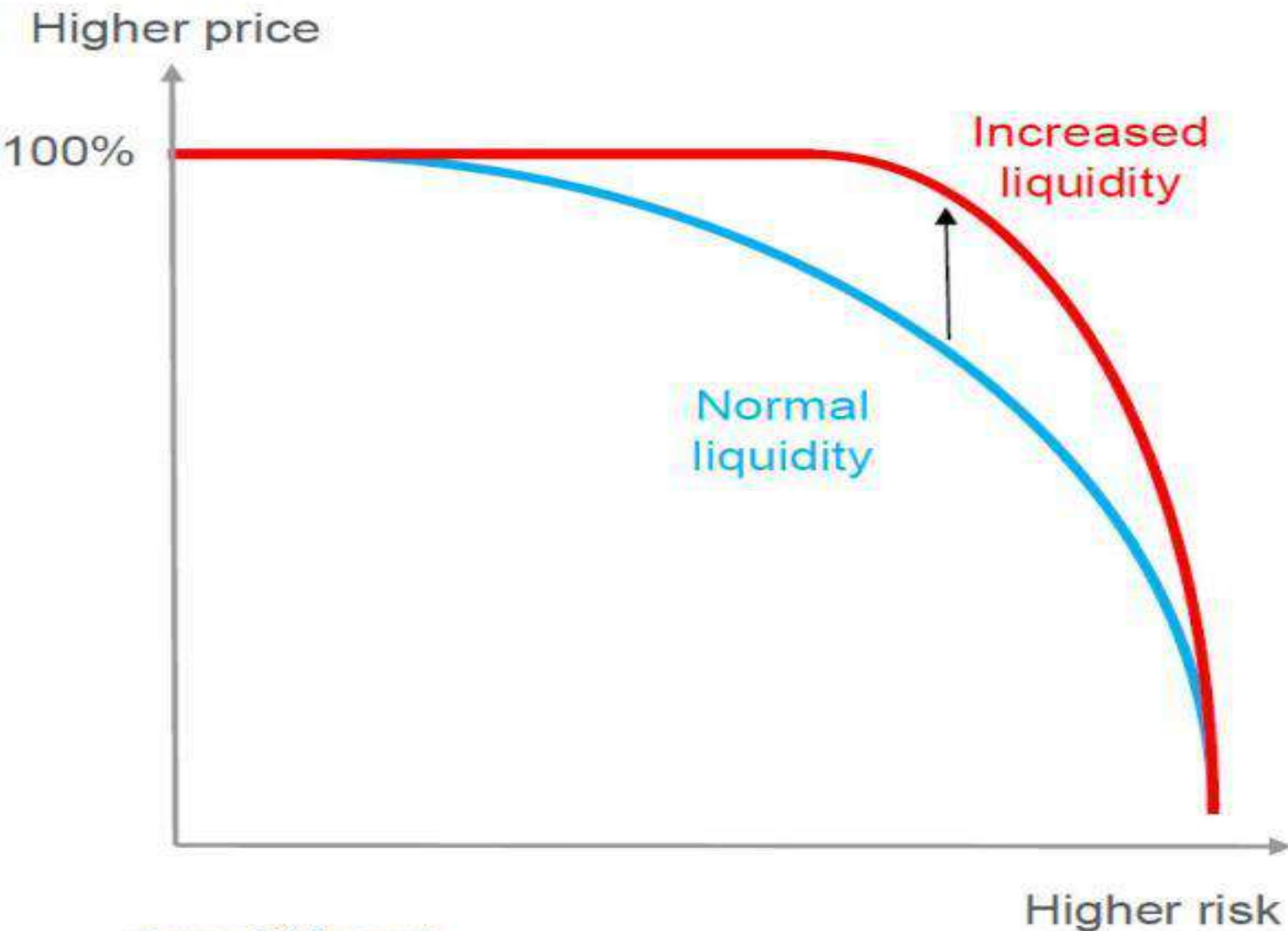
Financialization of the US Economy -

Total Marketable Debt Plus Equities Vs. GDP



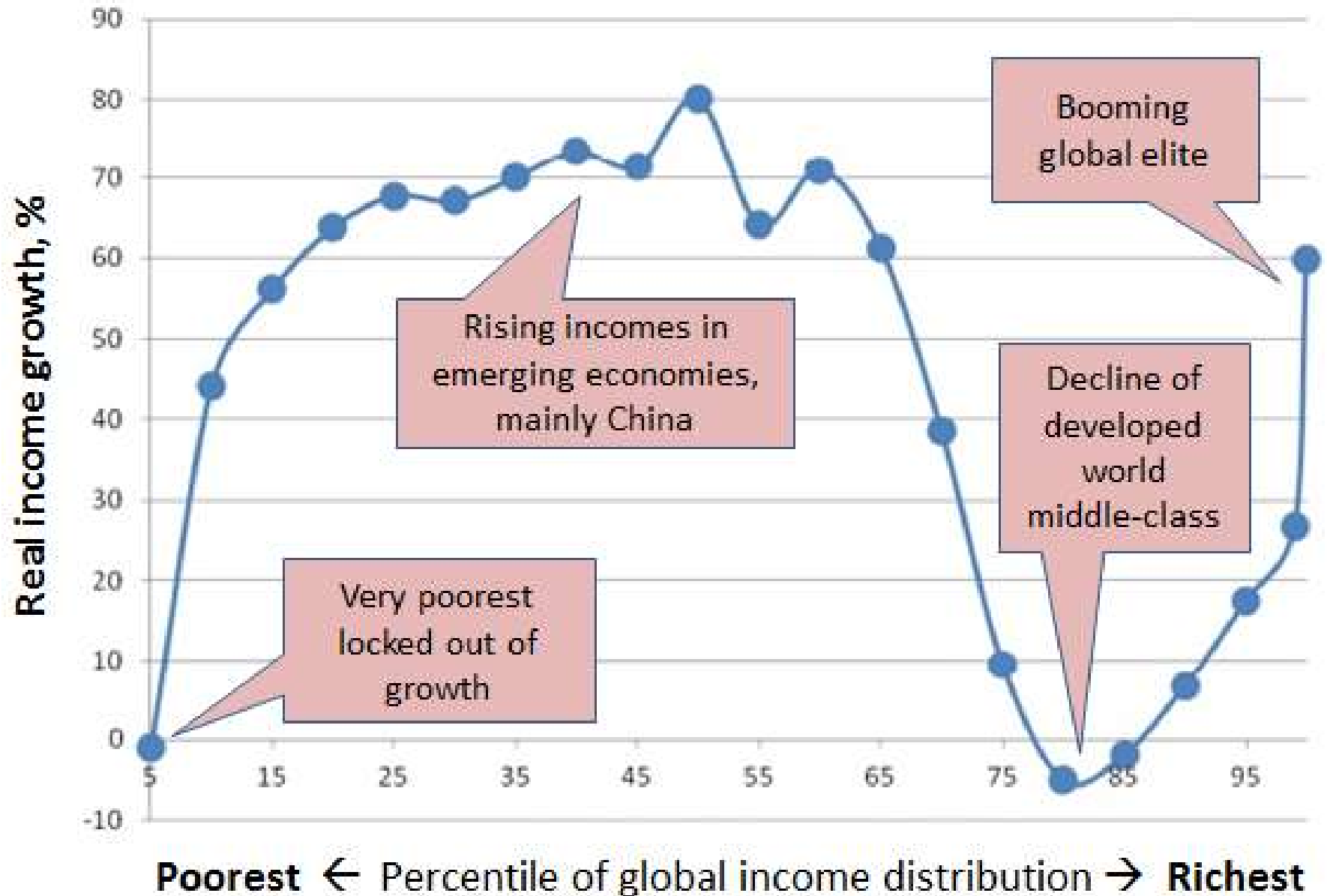
Ride the wave – but mind the cliff!

How credit pricing reacts to increased liquidity, schematic



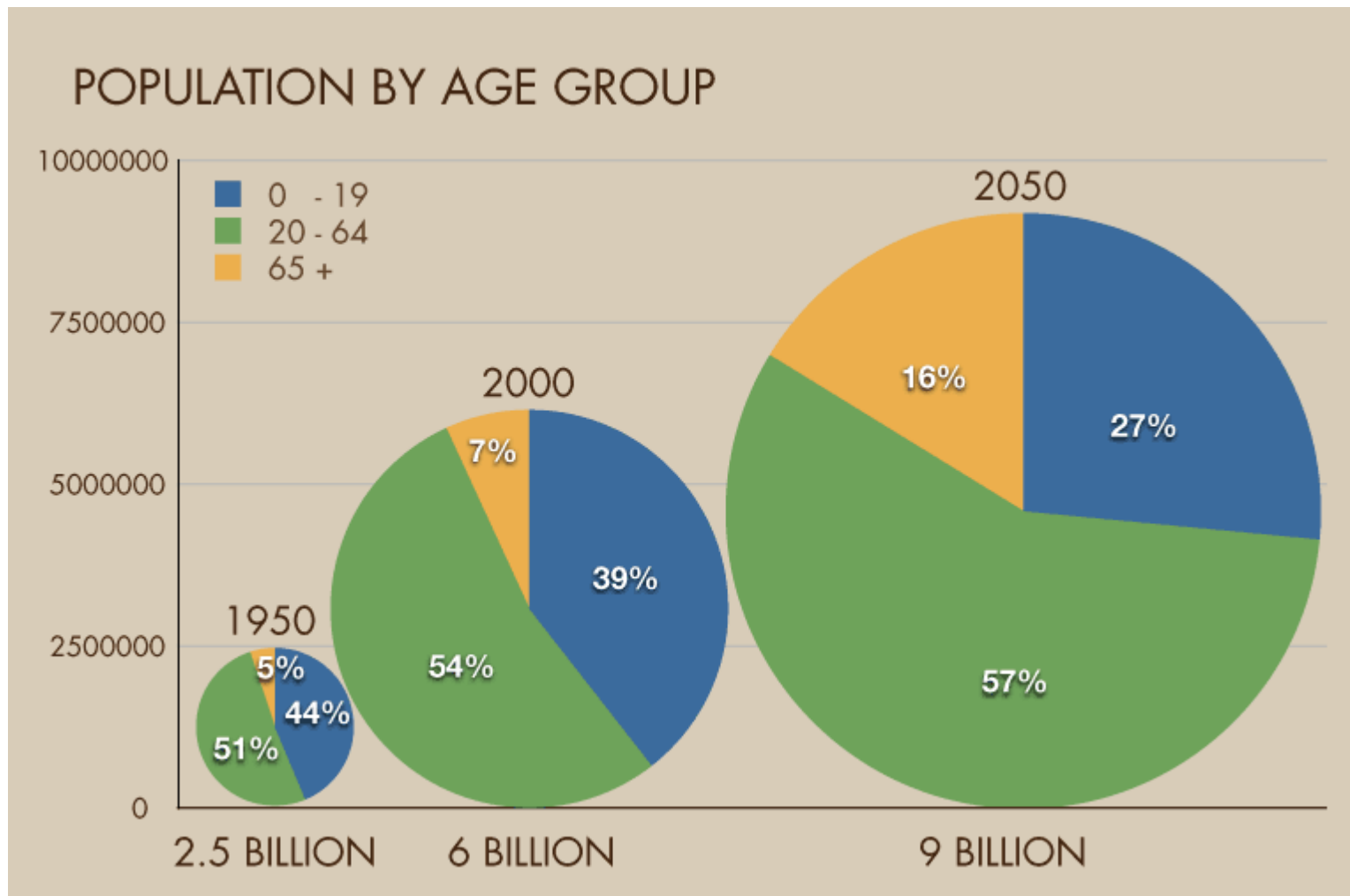
Source: Citi Research.

Global income growth from 1988 to 2008

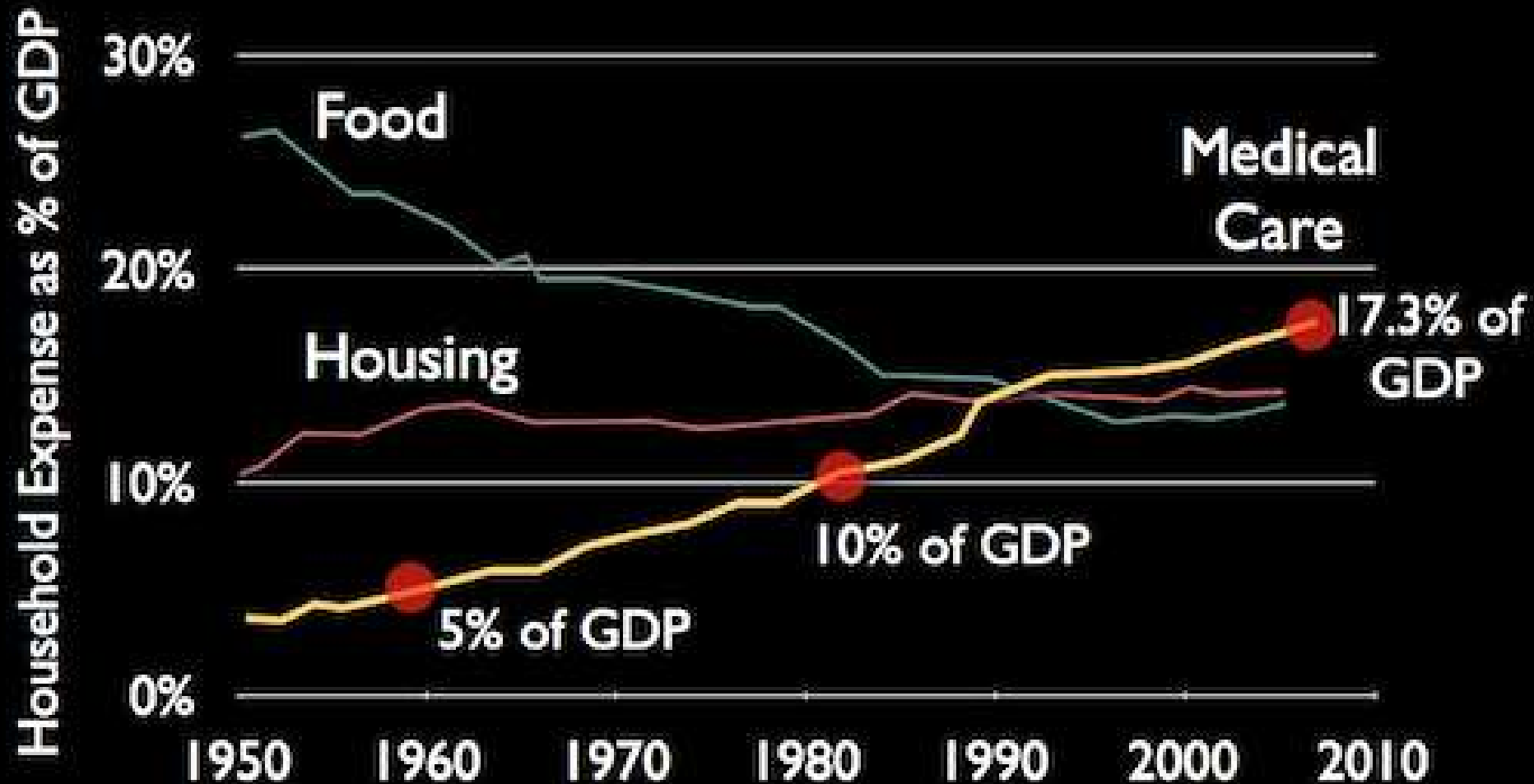


2. Tervis ja vananemine

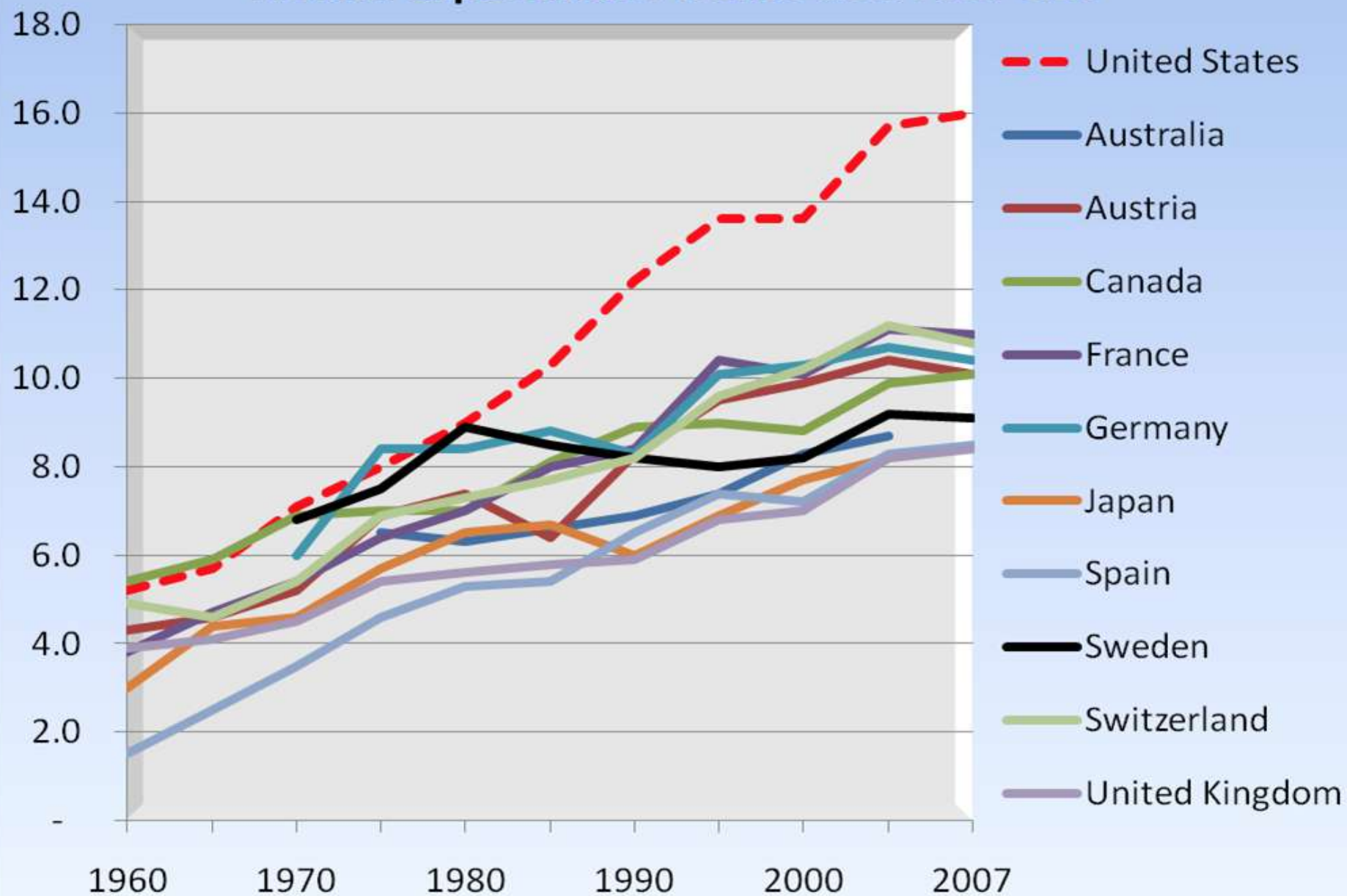
Elanikkonna vananemine



Household Expense Trends



Health expenditure trends as a % of GDP



Probleem ei kao kuhudi ..

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

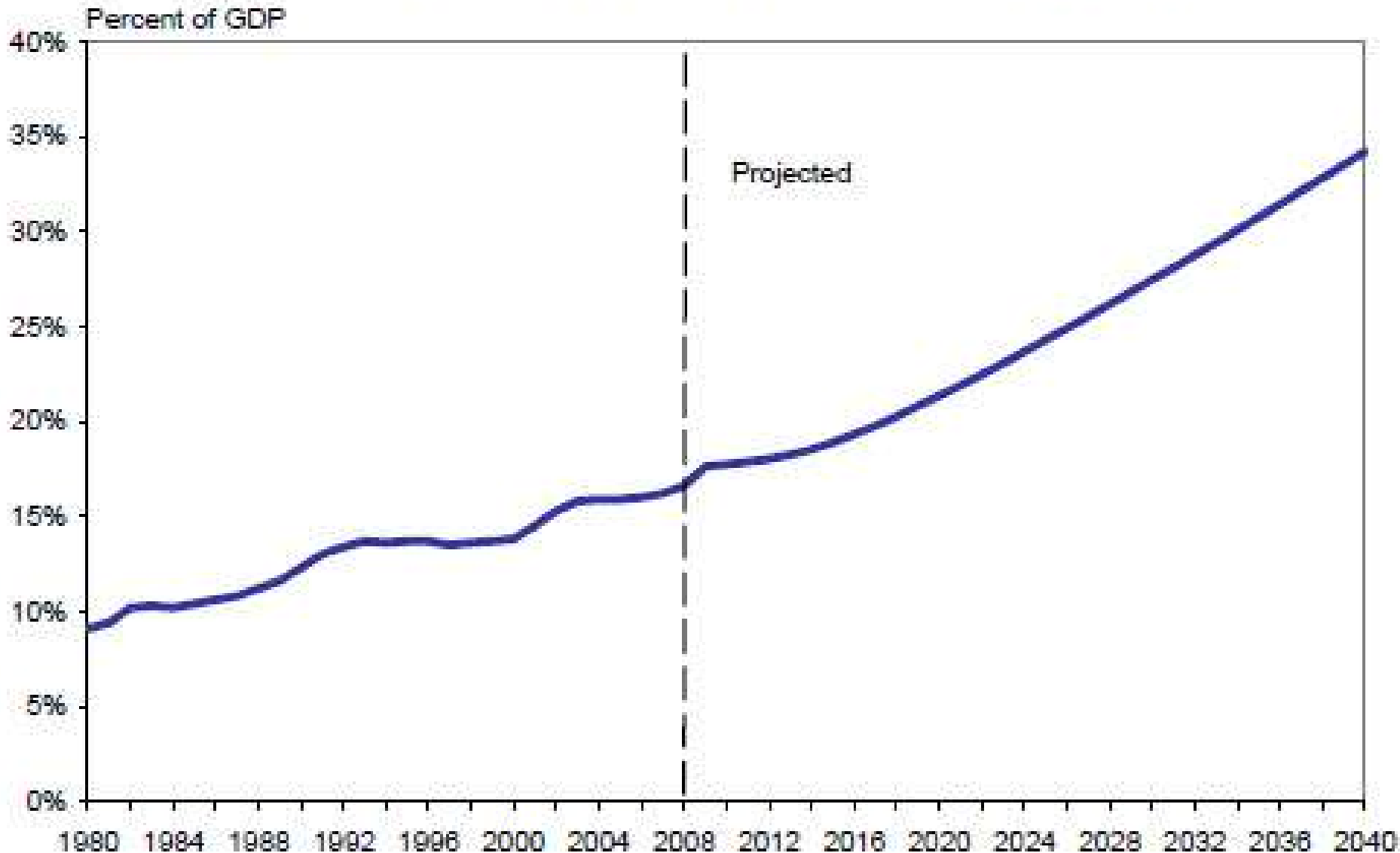
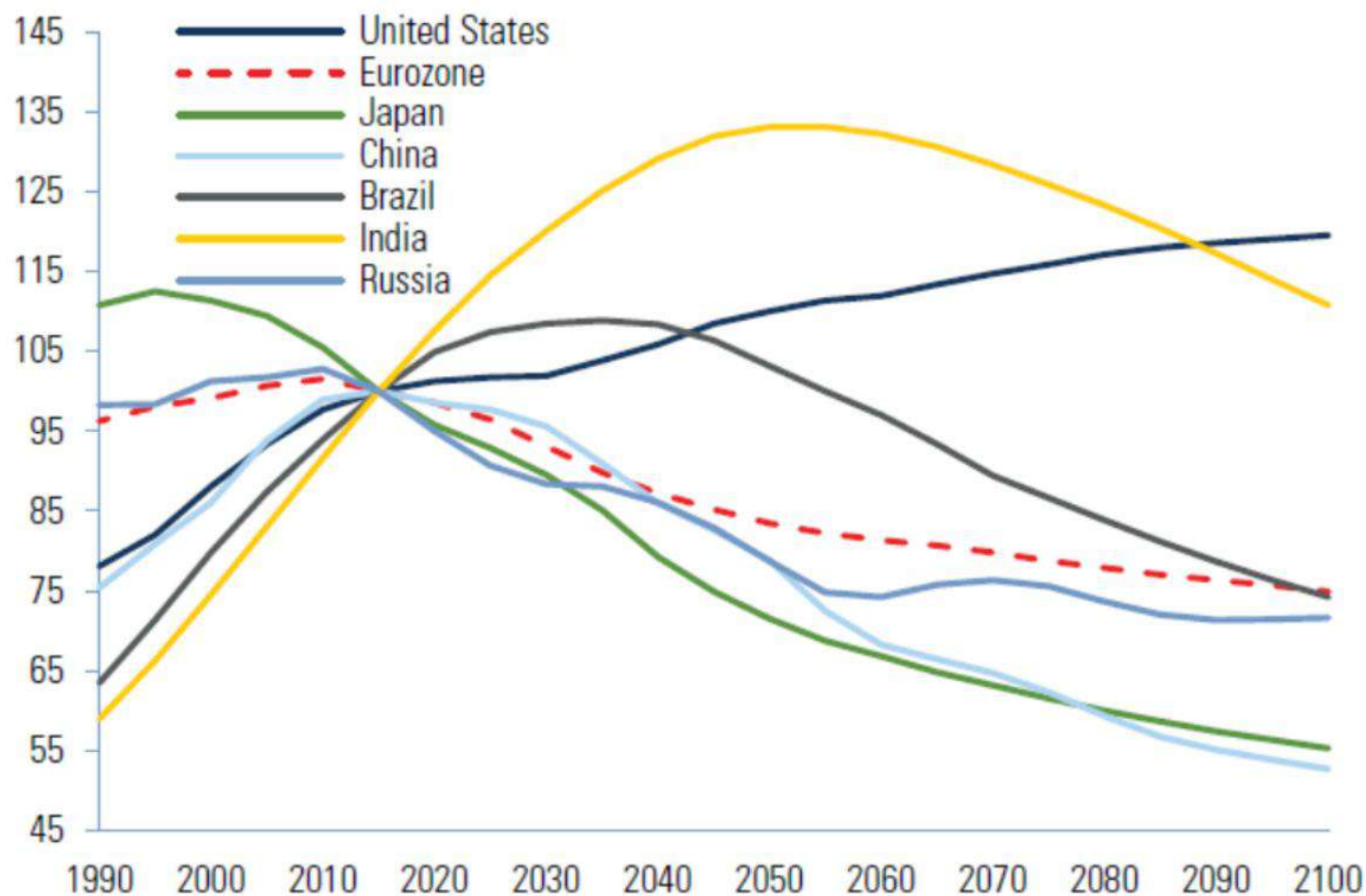


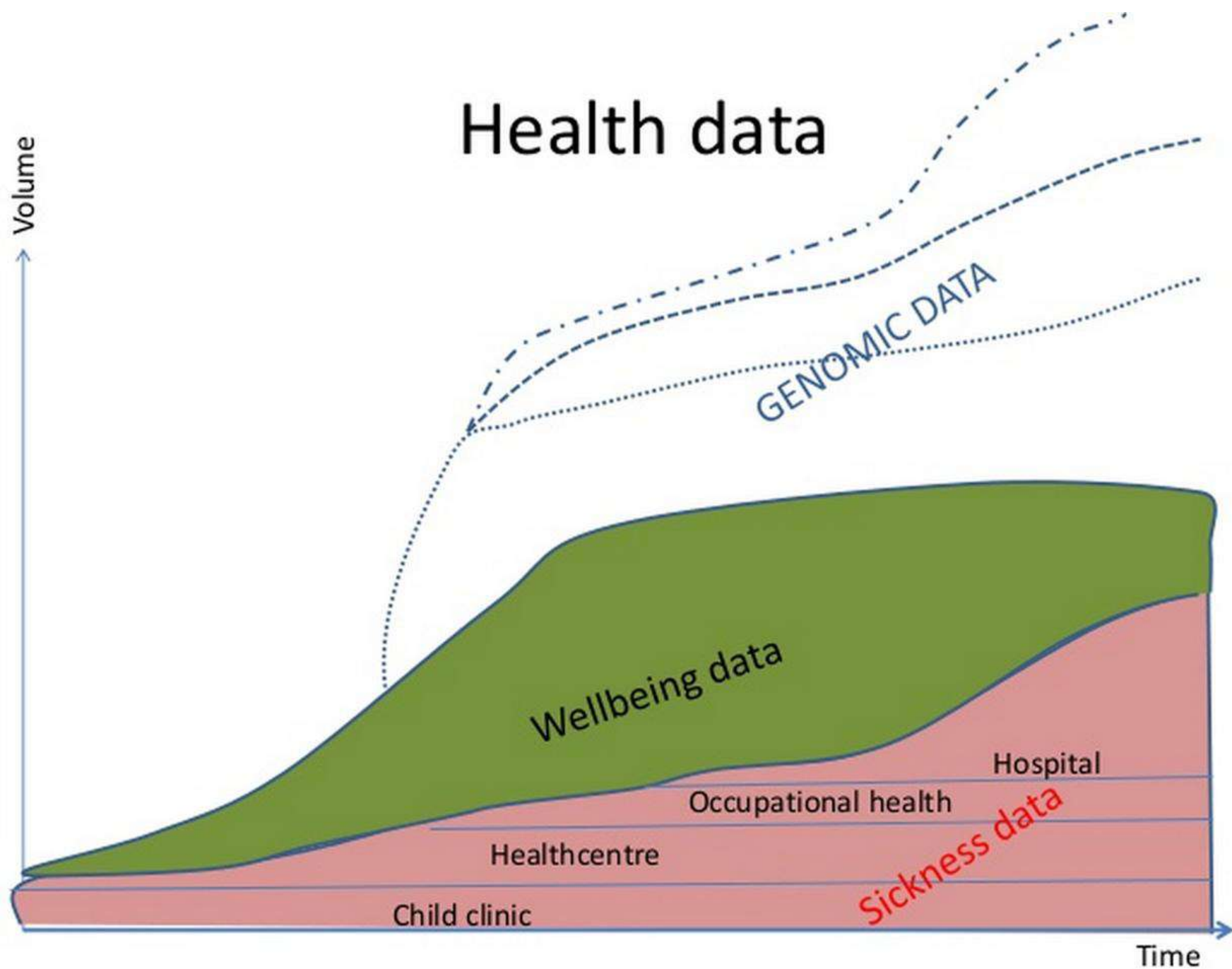
Chart 6: Long term working-age population projections

2015 = 100



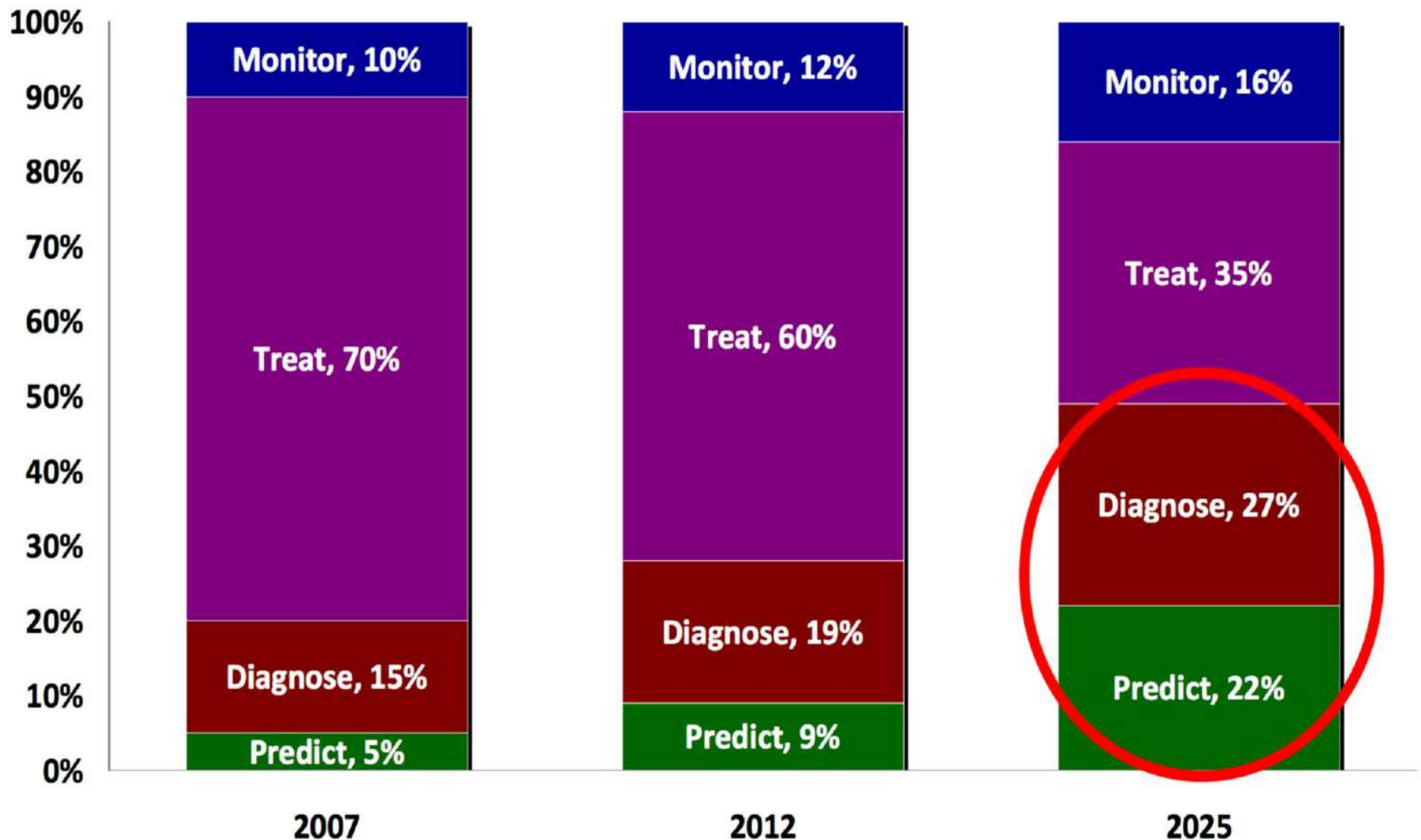
Source: Goldman Sachs Investment Management, United Nations

Health data

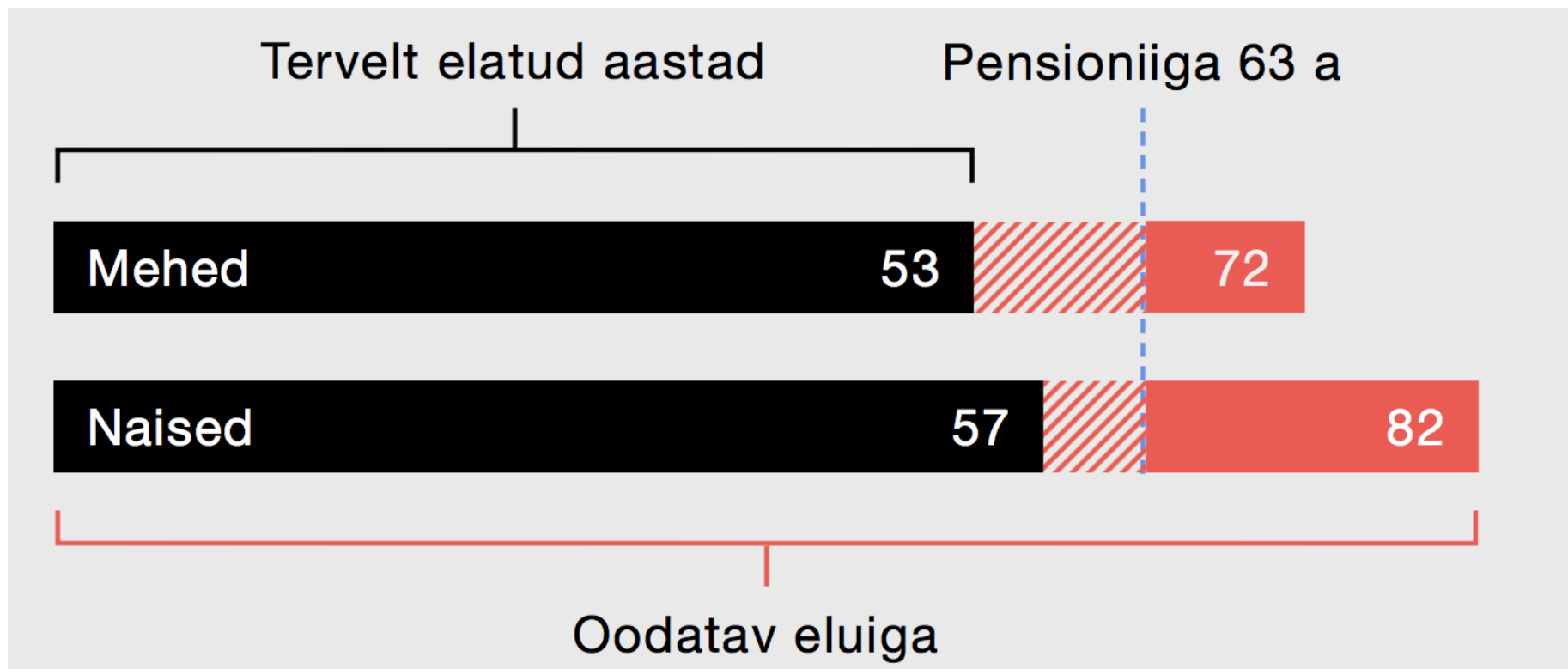


E-tervis

Healthcare Spending by Type of Activity



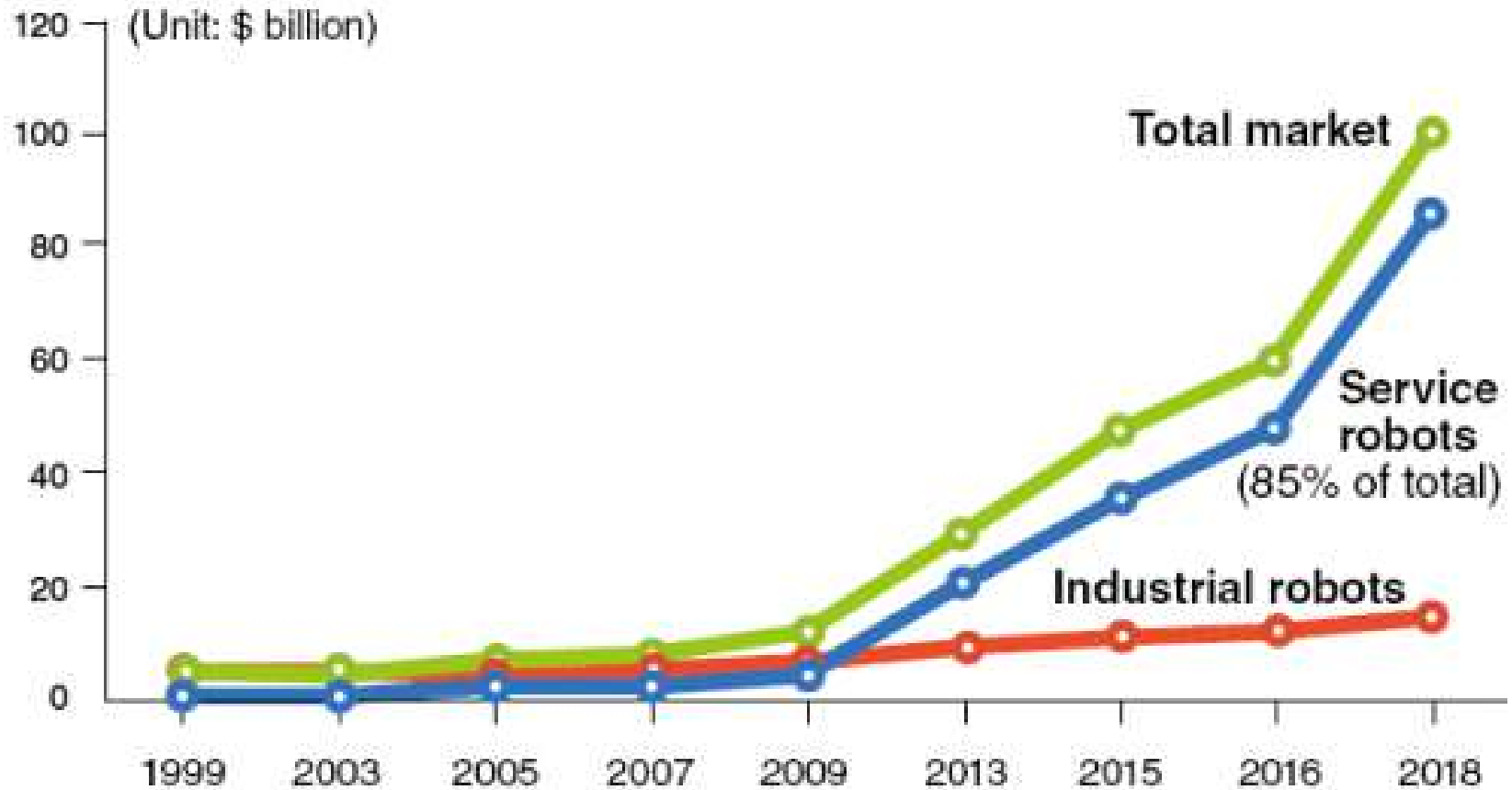
Tervelt elatud aastad



3. Tehnoloogiad

Robotite kasv

Global robot market outlook



Sensorite kasv

MEMS and sensor shipments for wearable device

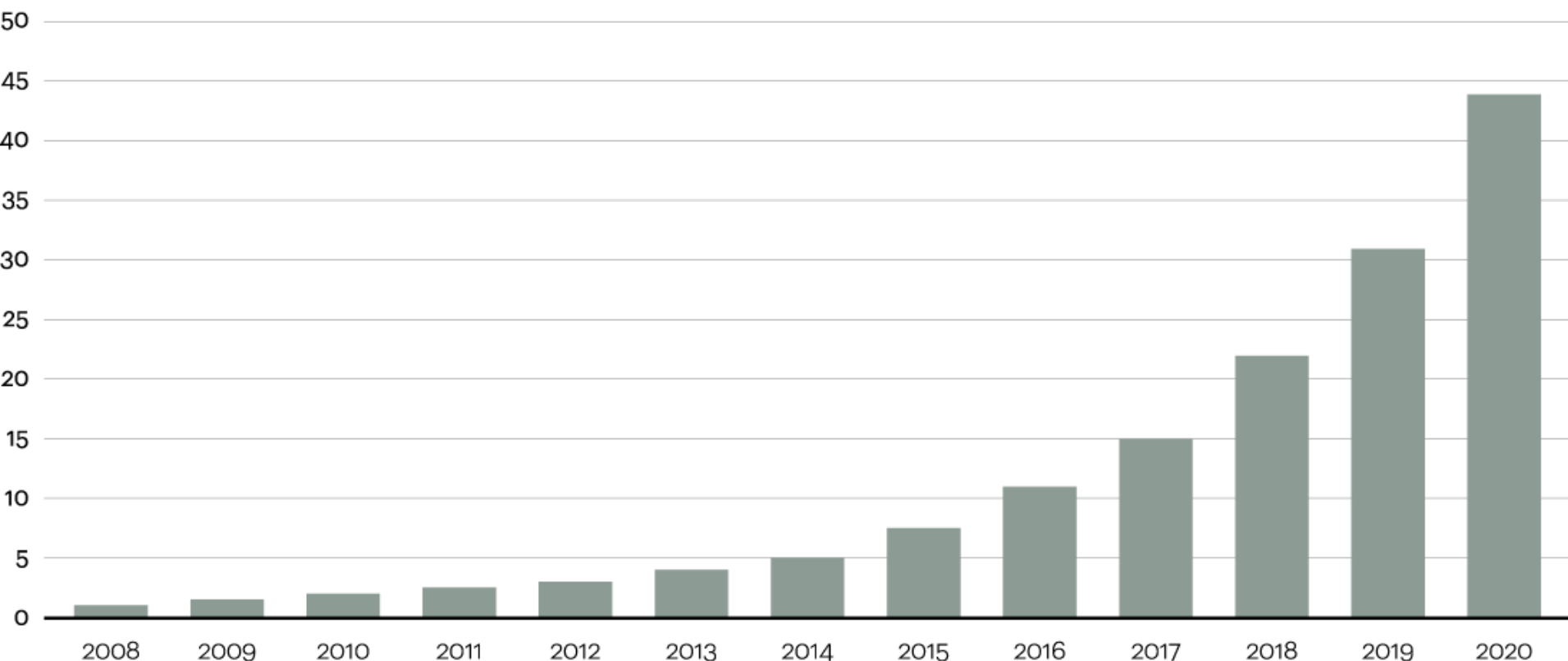


Andmete kasv 40% aastas

Figure 1

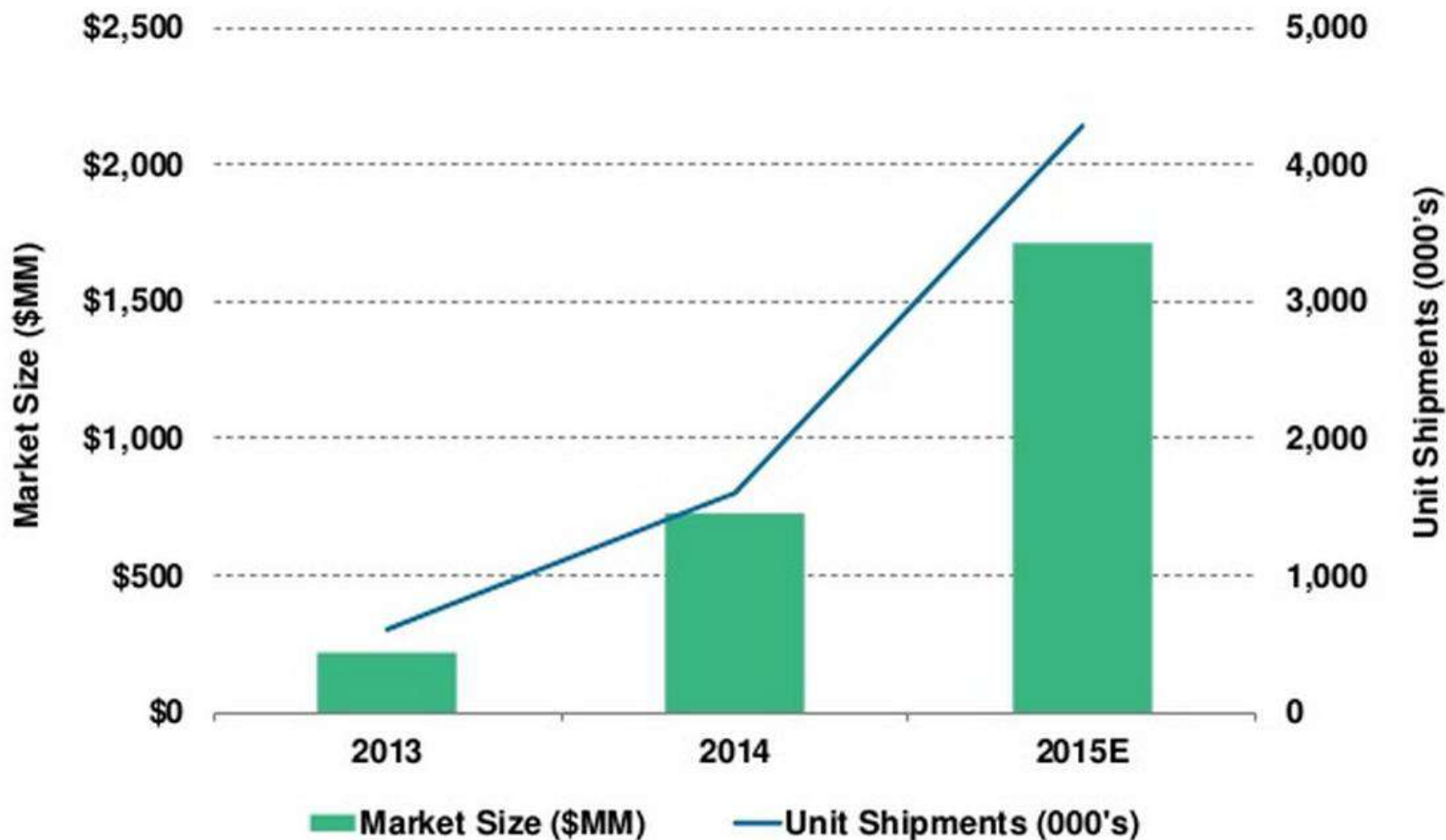
Data is growing at a 40 percent compound annual rate, reaching nearly 45 ZB by 2020

Data in zettabytes (ZB)

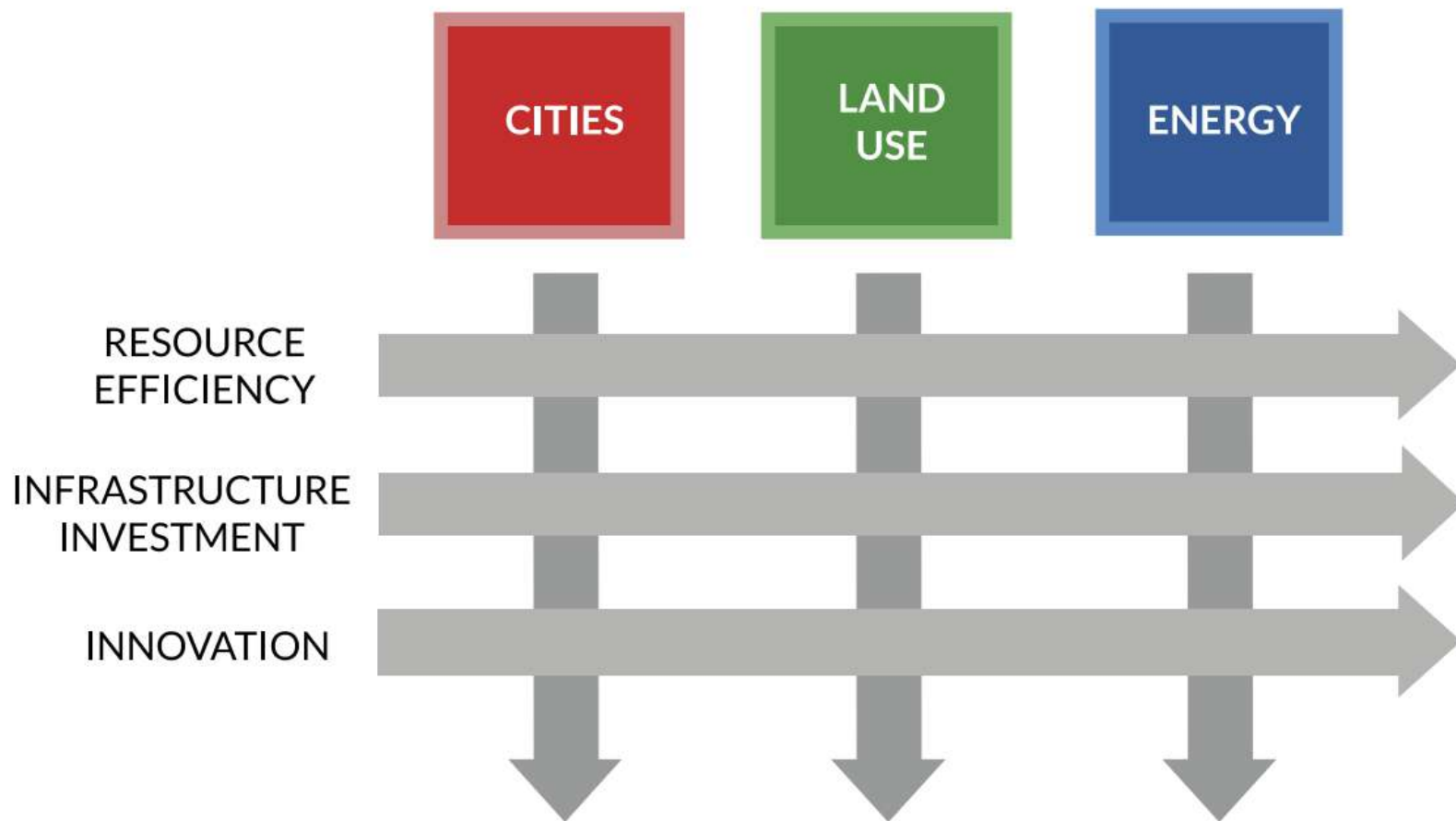


Droonide kasv +167% aastas

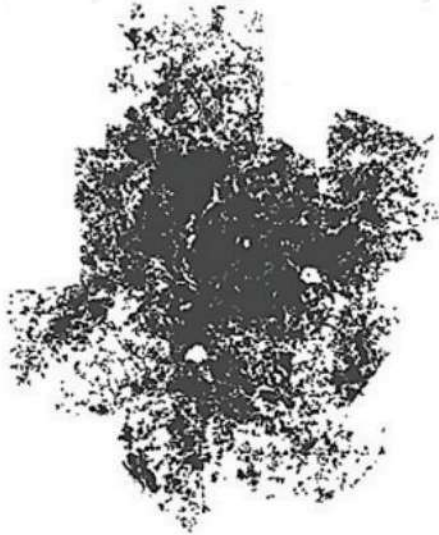
Global Consumer Drones – Revenue & Unit Shipments, 2013 – 2015E



Muutuv maailm



ATLANTA'S BUILT-UP AREA



0 10 20 (km)

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



0 10 20 (km)

POPULATION:

2.8 MILLION

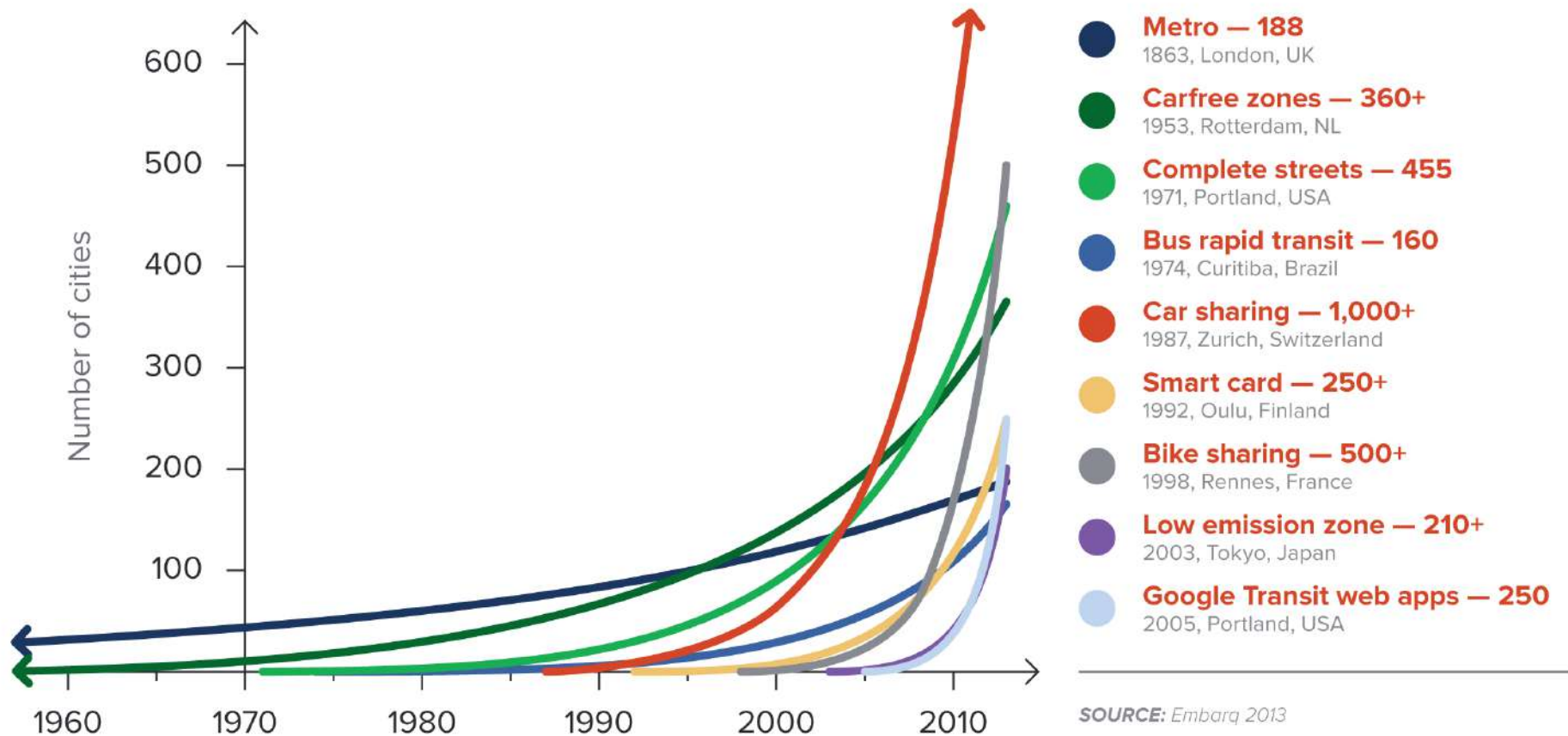
URBAN AREA:
TRANSPORT

162 KM²

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

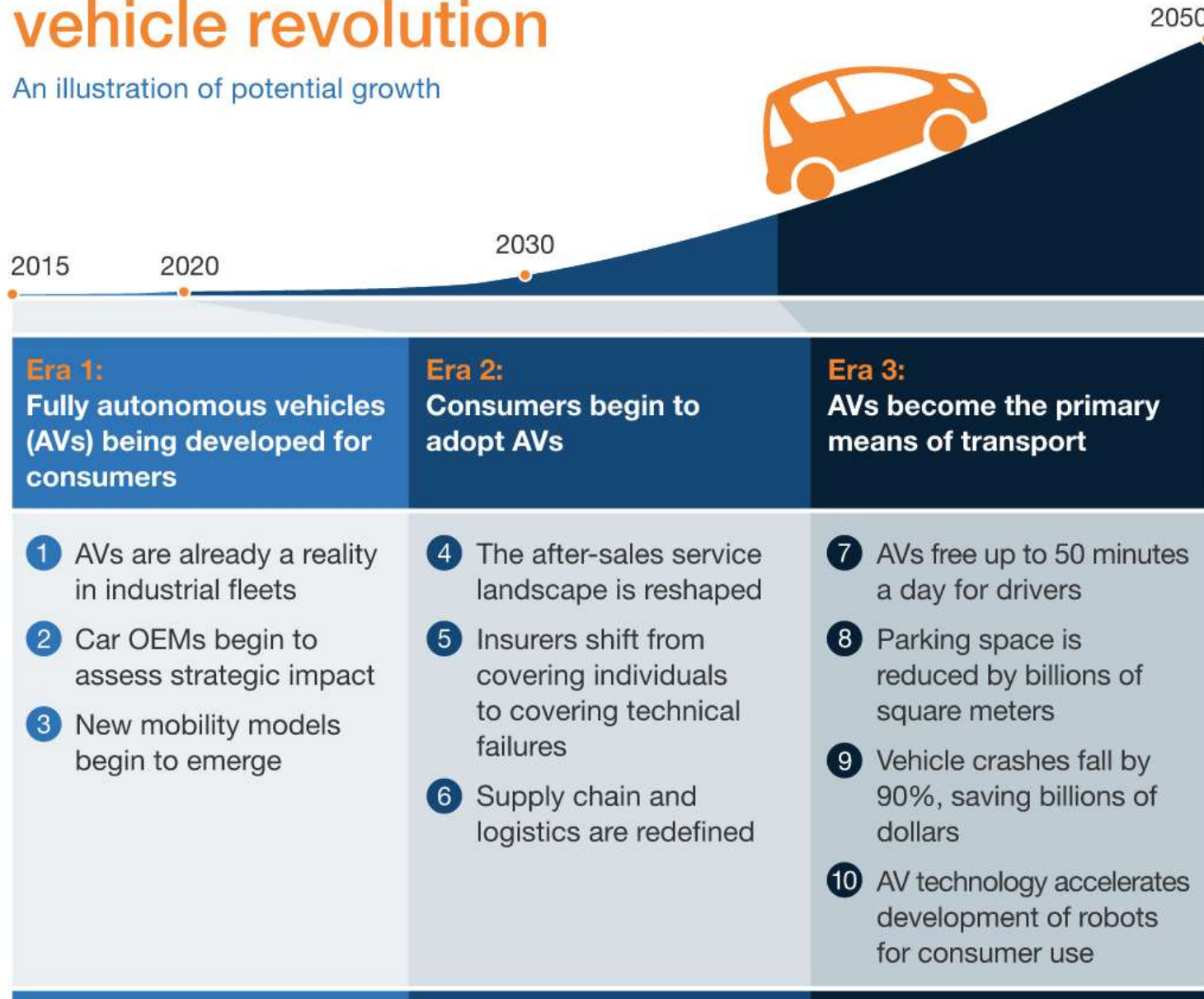
0.7

Used lahendused linnades



The self-driving vehicle revolution

An illustration of potential growth



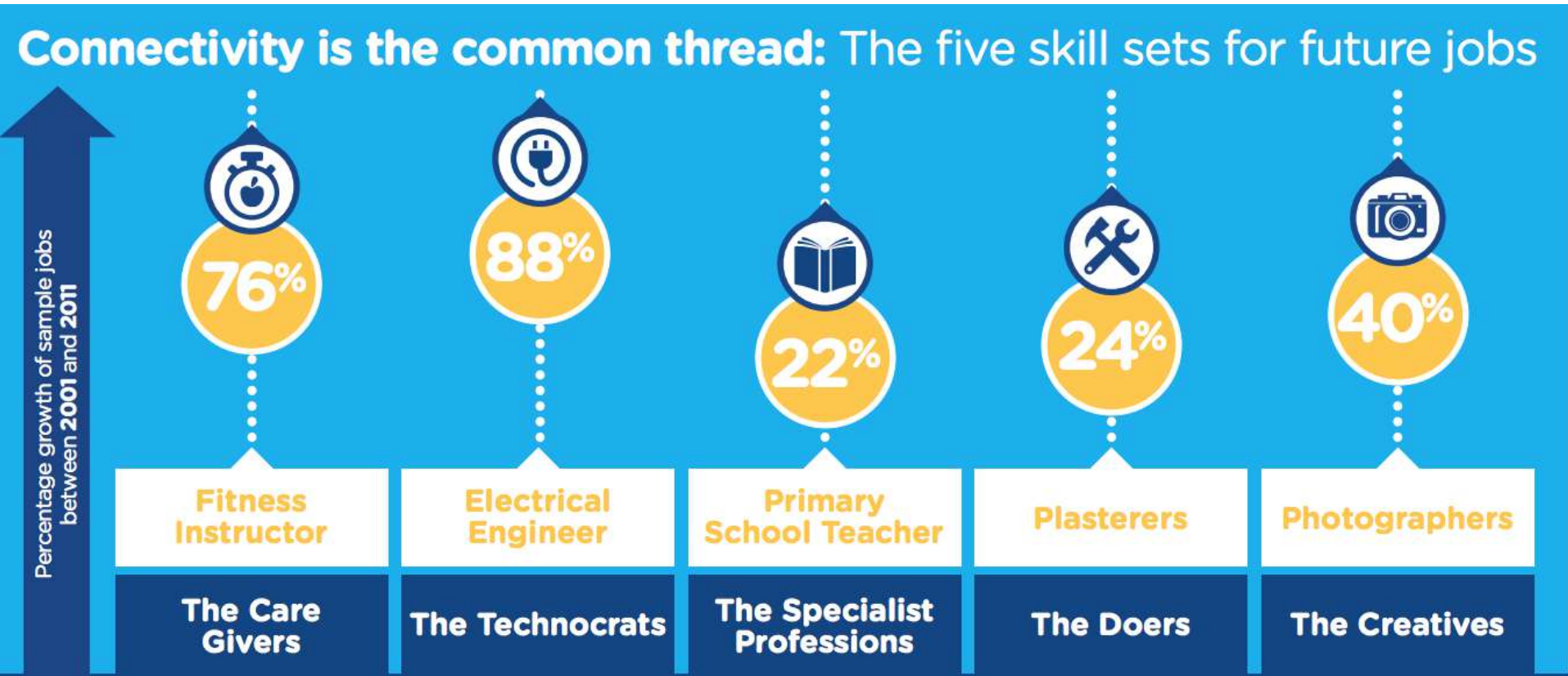
Autovabad linnad?

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





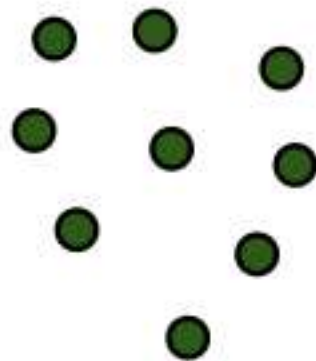
Tuleviku töökohad



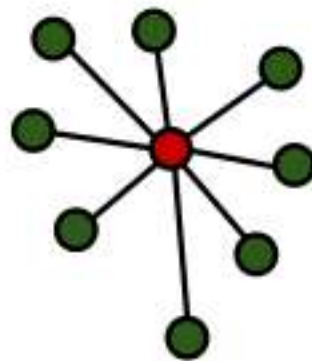
The Changing Nature of Work & Learning

jarche.com

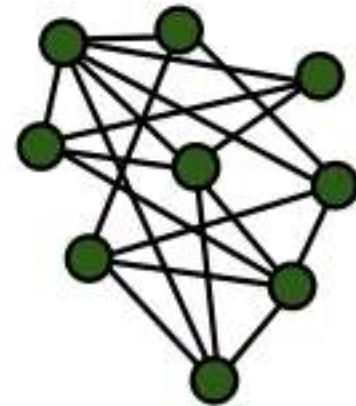
~19th C



+/- 20th C



21st C

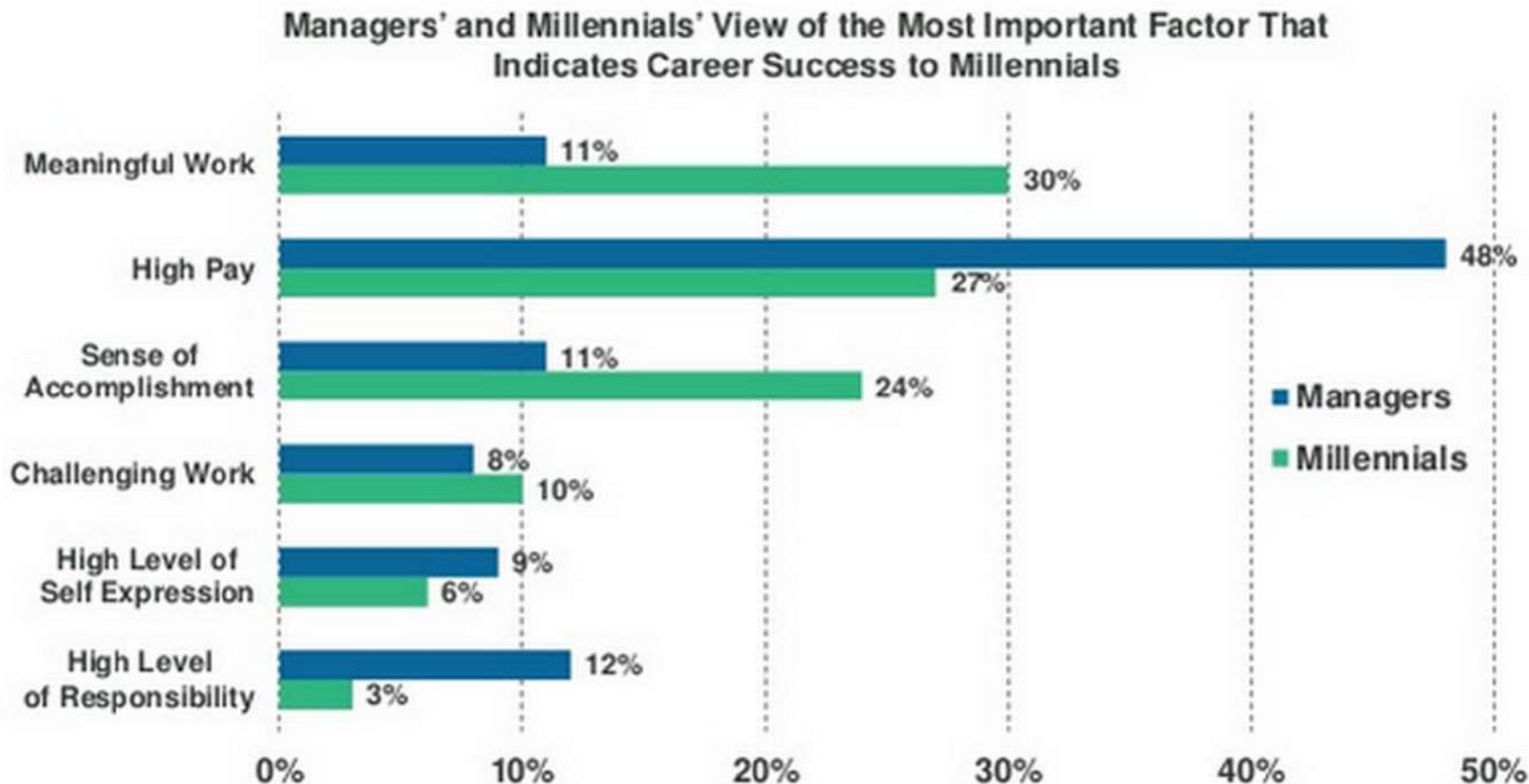


Artisans - Corporations - Networks

Apprenticeship - Training - SoLoMo

Noorte jaoks töö tähtsus olulisem kui raha

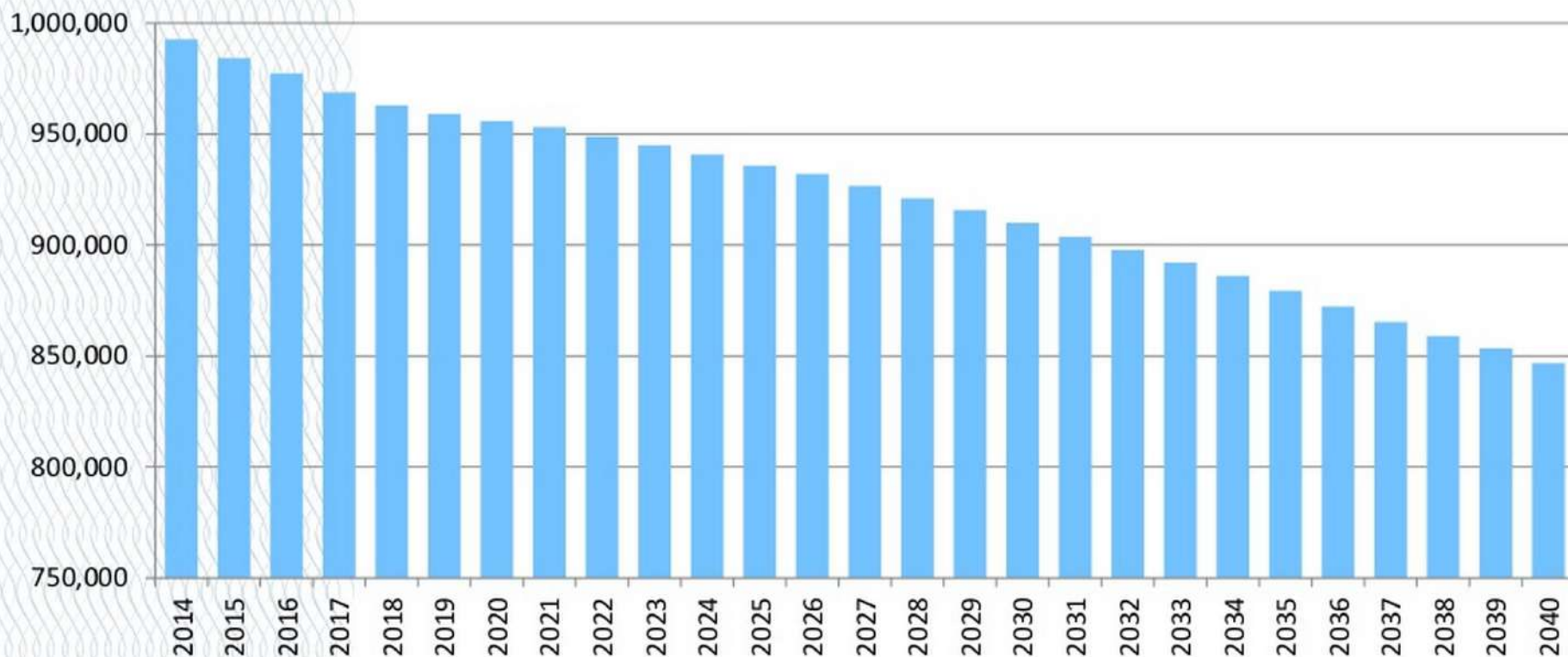
Most Important Thing to Millennials = Meaningful Work
What Managers Think Is Most Important Thing to Millennials = Money



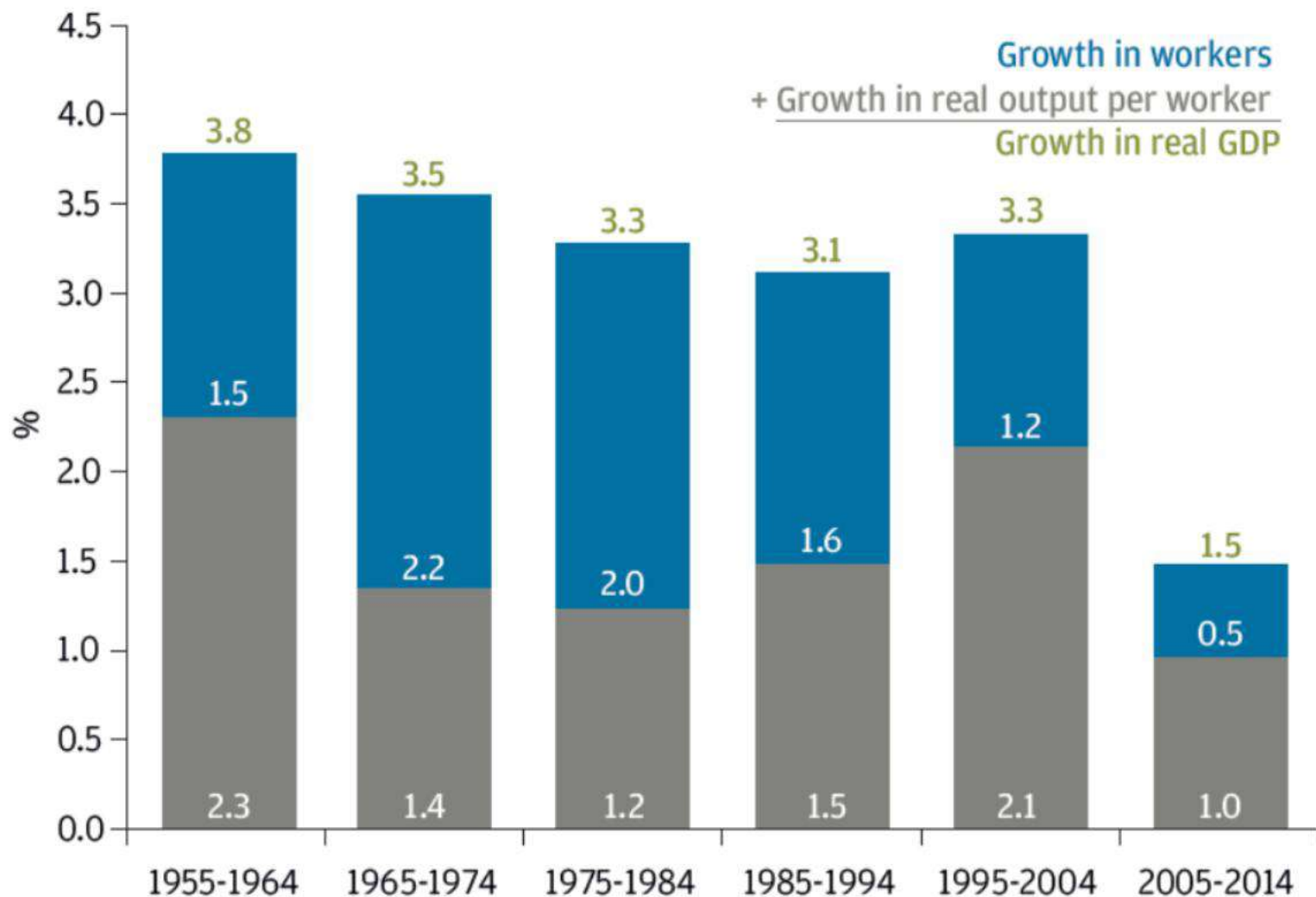
4. Eesti

Rahvastikuprognosis

Tööelise elanikkonna rahvastikuprognosis



USA majanduskasv – töötajate arvu kasv + tootlikkuse kasv



351

AVERAGE WEALTH PER ADULT (IN 1000 USD)

(SOURCE: CREDIT SUISSE 2015)

195

320

183

259

177

304

262

567

N/A

74

112

204

321

311

150

36

21

23

2

24

42

24

31

196

56

22

11

7

18

N/A

9

10

81

13

16

19

12

1

3

19

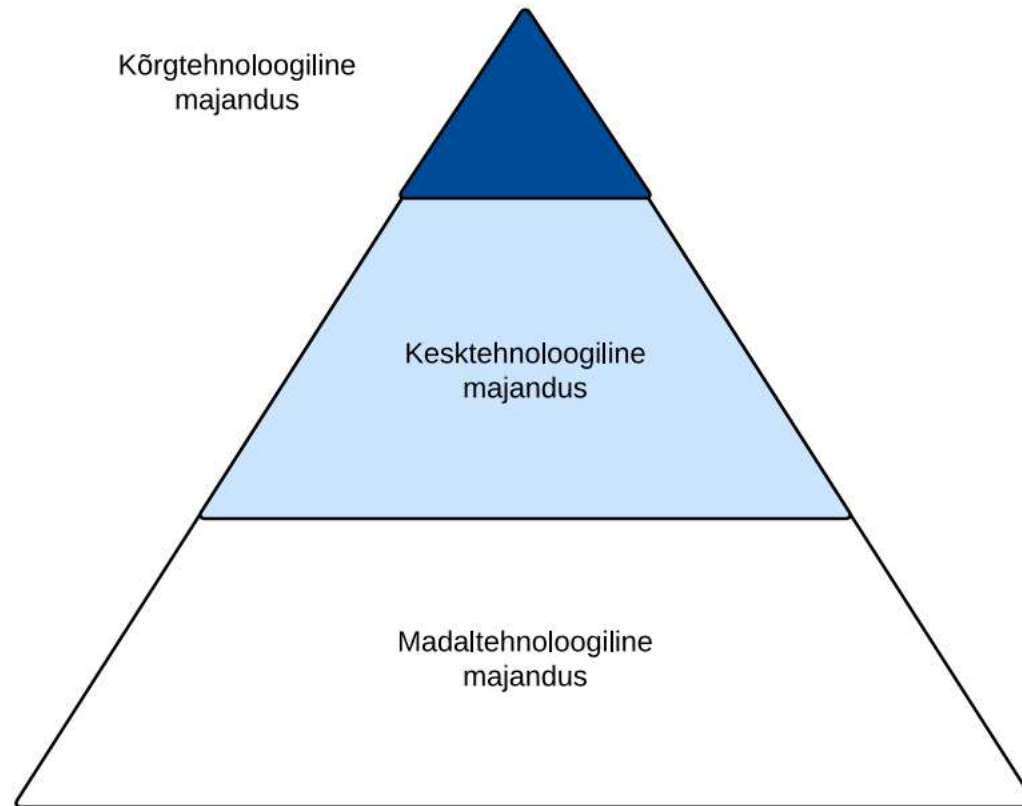
111

112

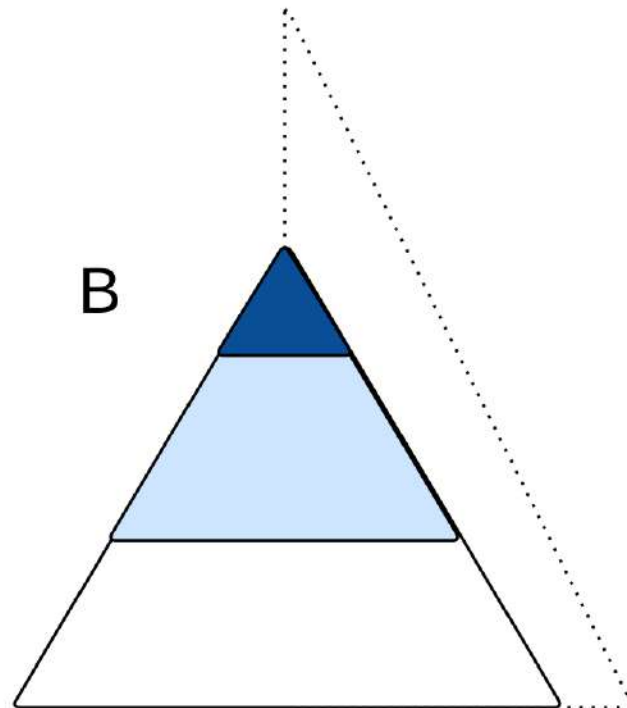
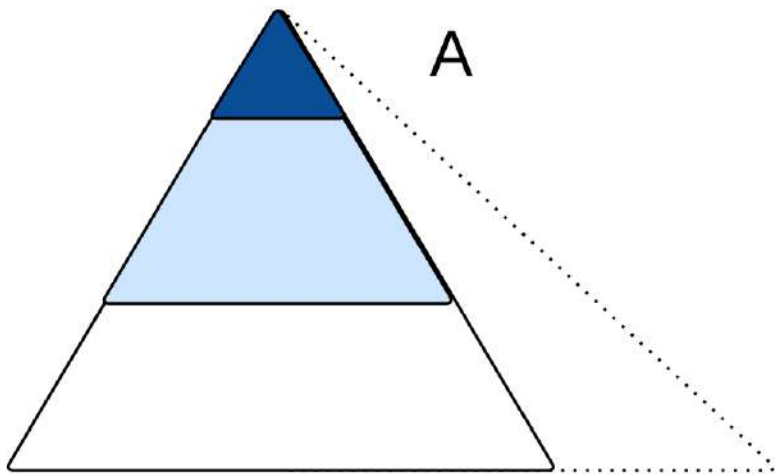
MORE MAPS AT:

JAKUBMARIAN.COM

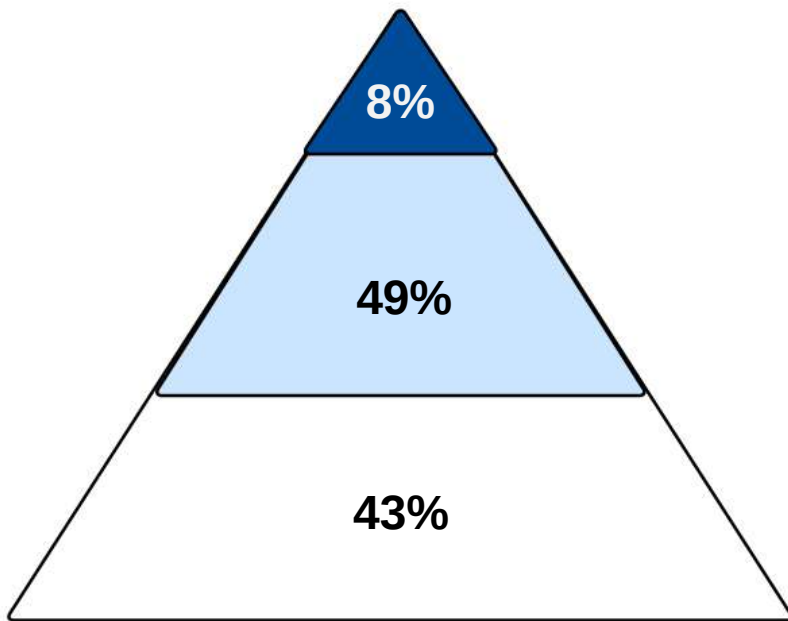
Majanduse tänane struktuur



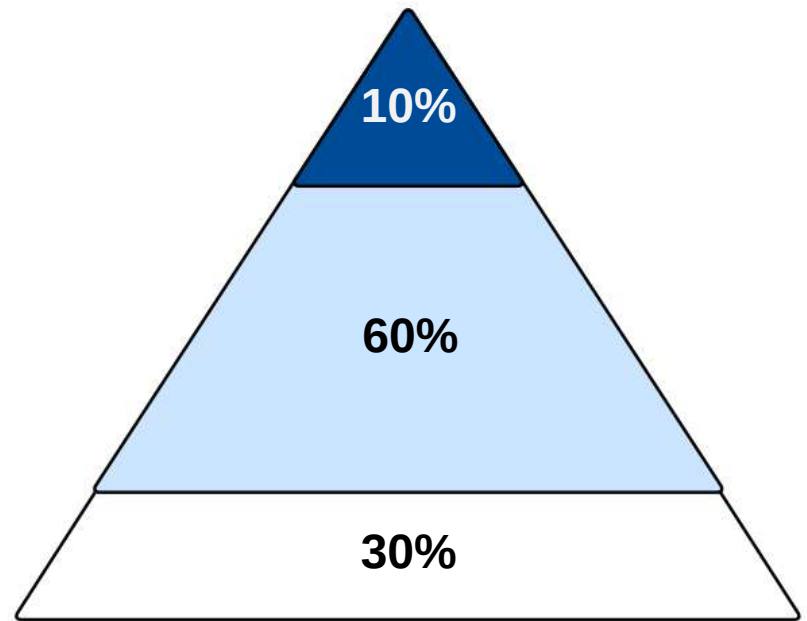
Maianduse struktuur tulevikus?



Eesti vs Soome

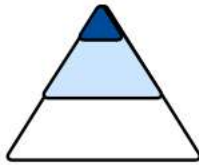


Eesti

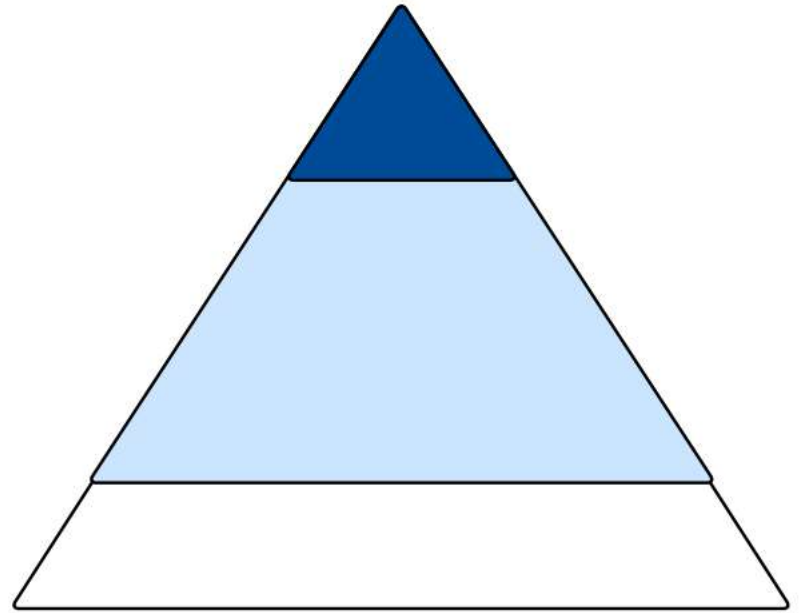


Soome

Eesti vs Soome (mahud, 10x)



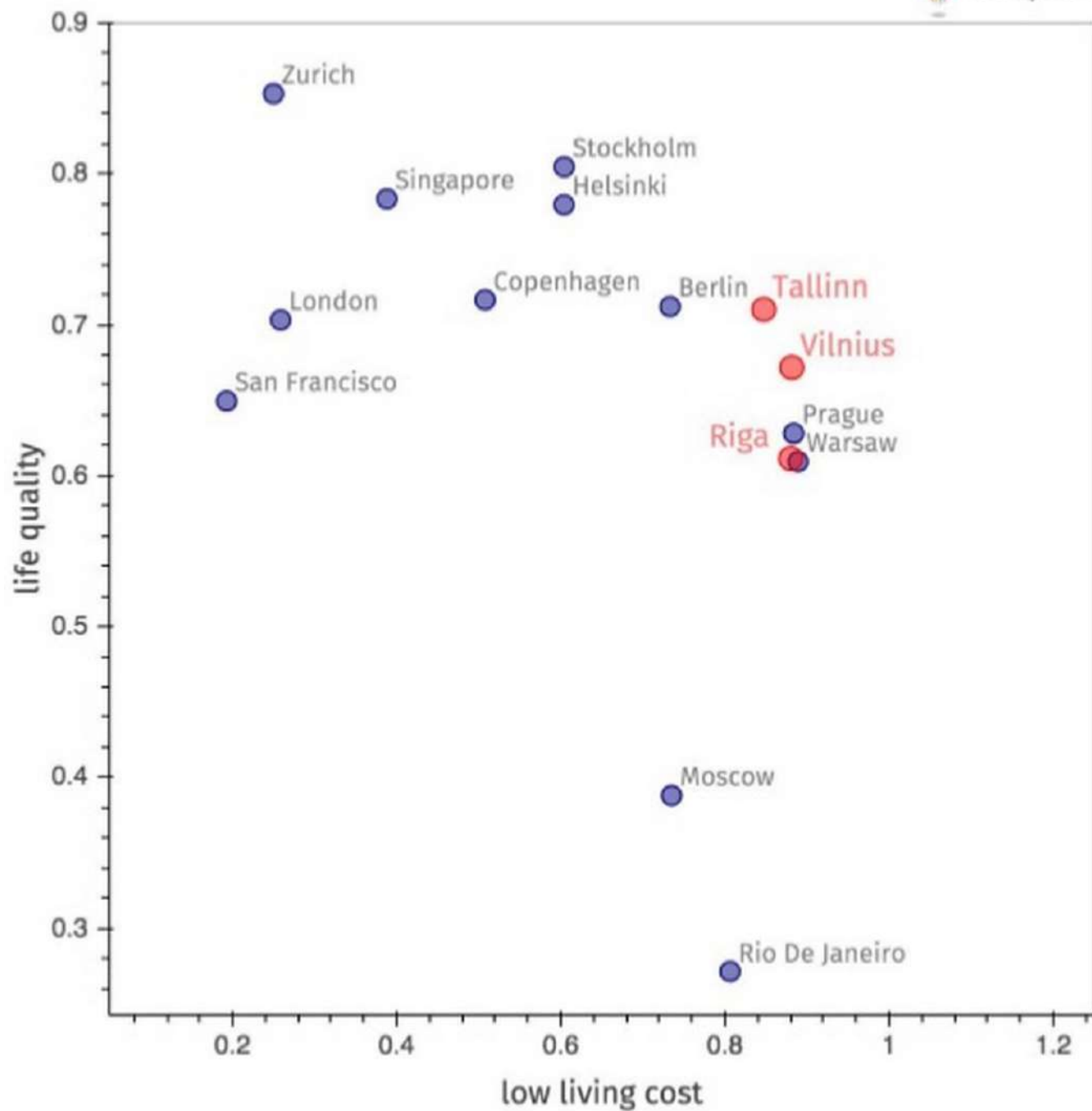
Eesti

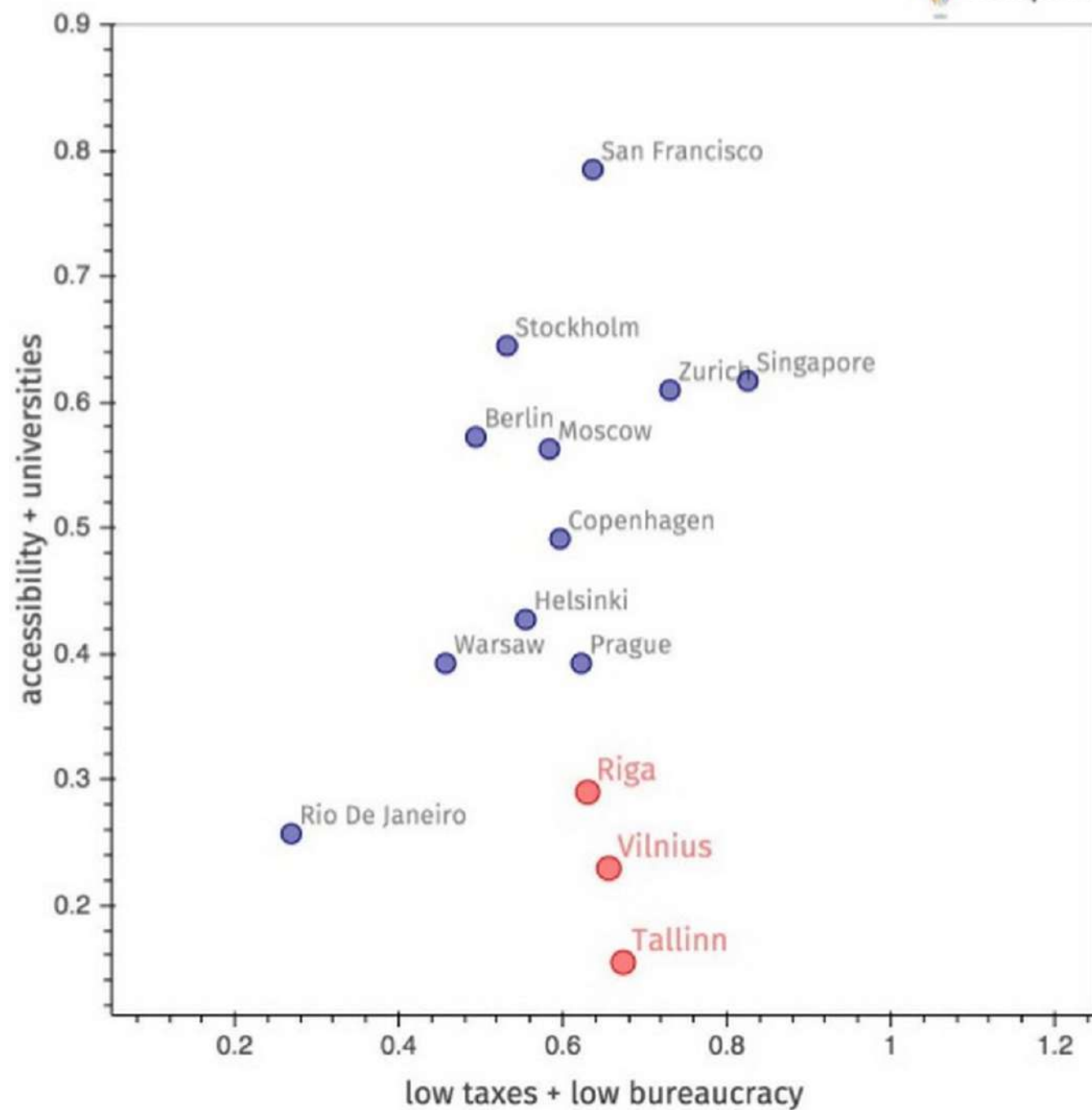


Soome

REALITY: ALL GOVERNMENTS COMPETING FOR EVERY CITIZEN





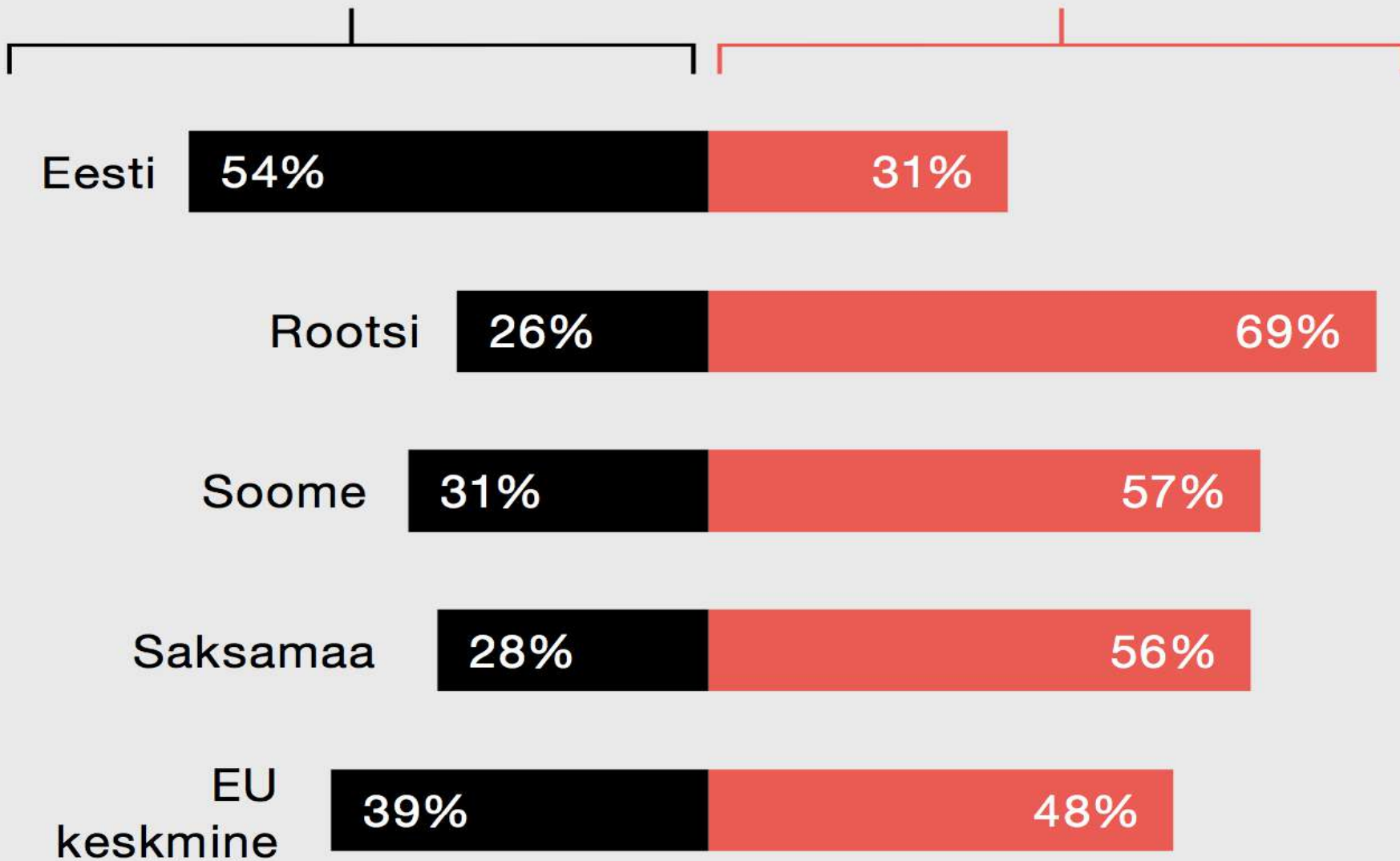


TEADLASTE JA INSENERIDE
HÕIVE KÕRGHARIDUSSEKTORIS

2013

TEADLASTE JA INSENERIDE
HÕIVE ETTEVÕTLUSES

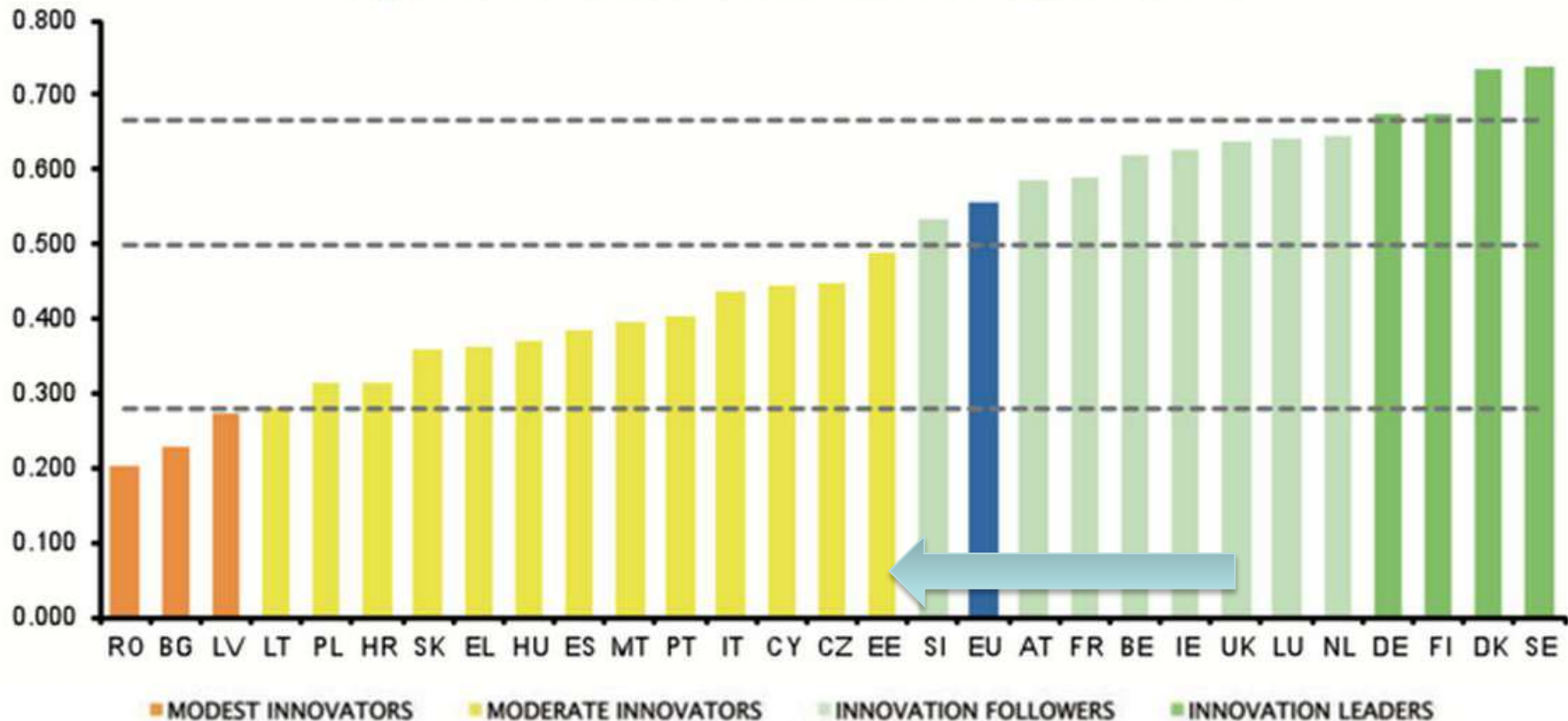
2013



Innovation union scoreboard

index

Figure 1: EU Member States' innovation performance



Miks Eesti positsioon on nõrgenenud?

	Inim- ressurss	Teadus- süsteem	Kapital	Ettevõtete investeeringud	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

