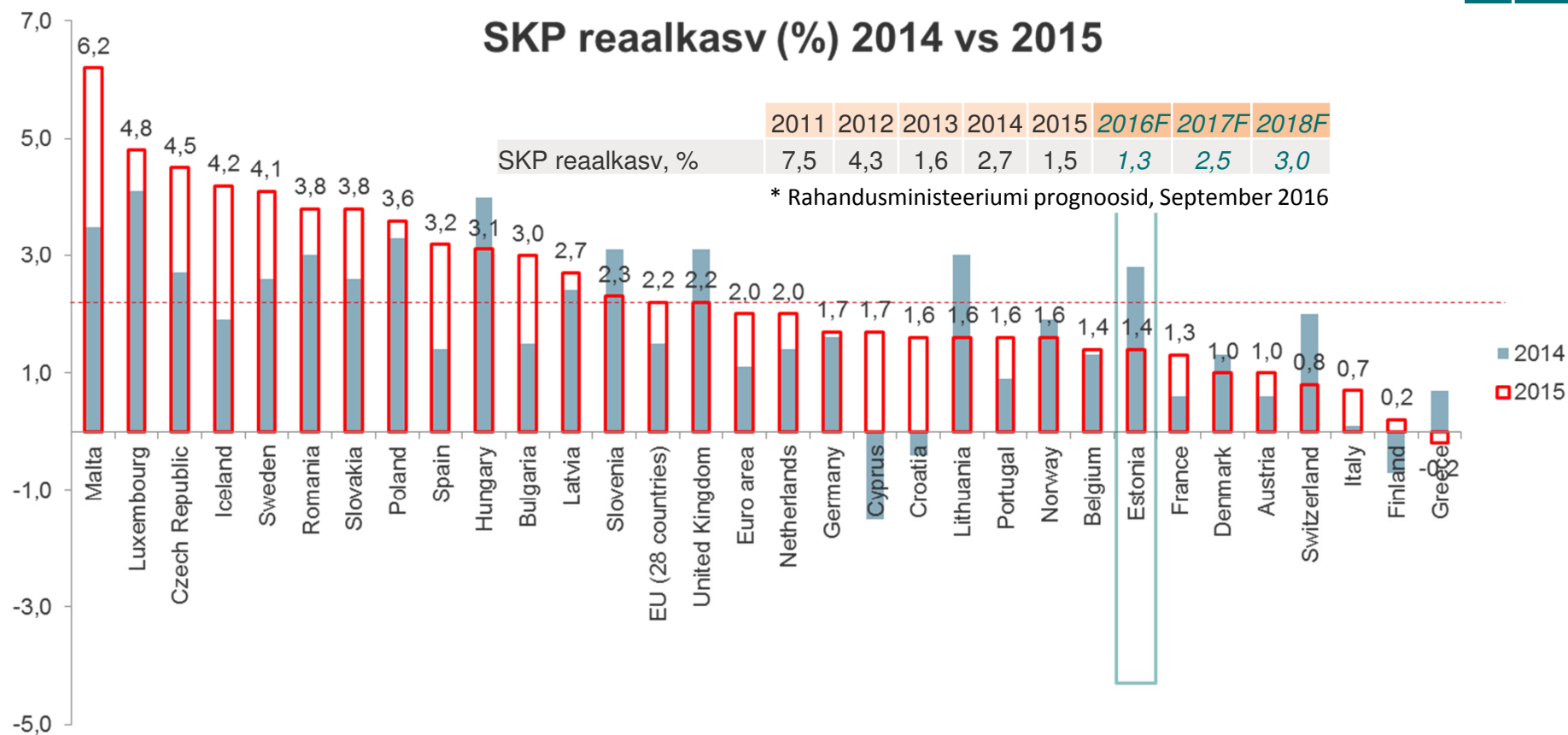




Tööjõukulude mõju Eesti tööstusettevõtetele

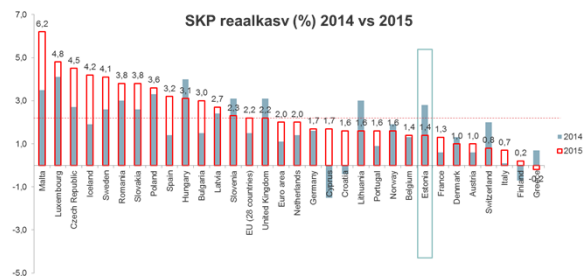
Priit Roosimägi, vanemanalüütik

18.11.2016

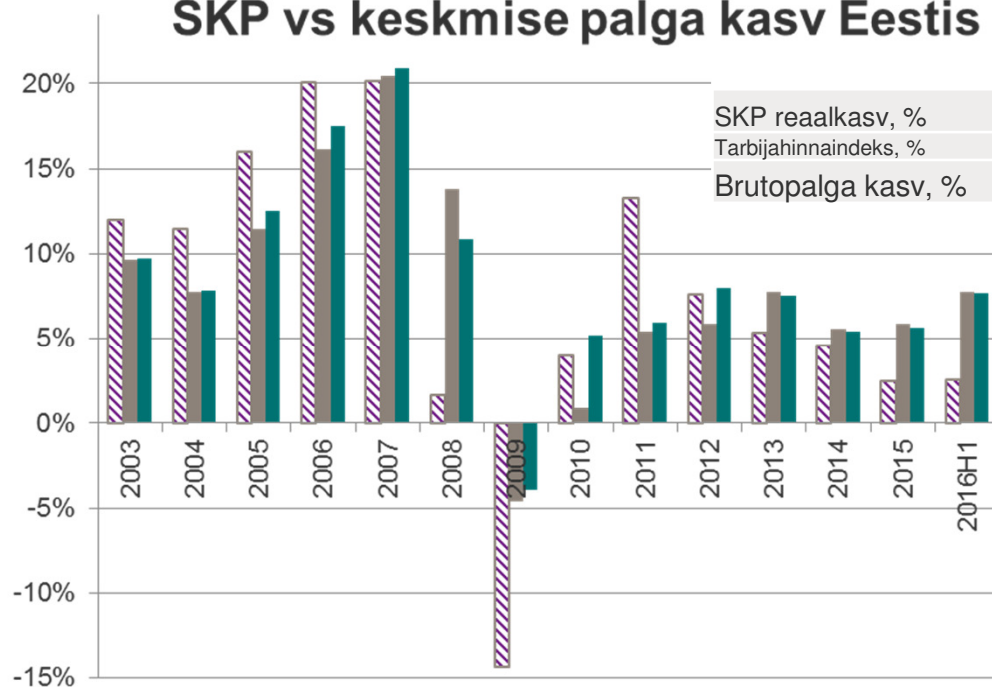


Graafikul pole toodud Iirimaa anomaalne 26,3% kasv (2014 8,5%)

Allikas: Eurostat



SKP vs keskmise palga kasv Eestis

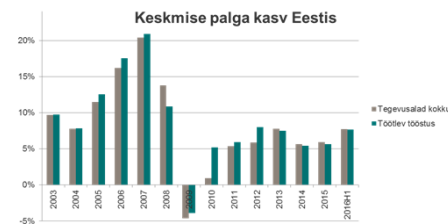
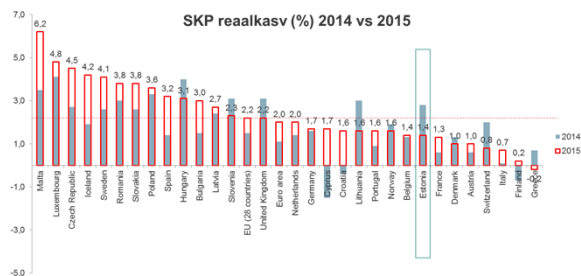


2011	2012	2013	2014	2015	2016F	2017F	2018F
7,5	4,3	1,6	2,7	1,5	1,3	2,5	3,0
5,0	3,9	2,8	-0,1	-0,5	0,2	2,7	2,7
5,9	5,7	7,0	5,9	6,0	6,7	5,5	5,5

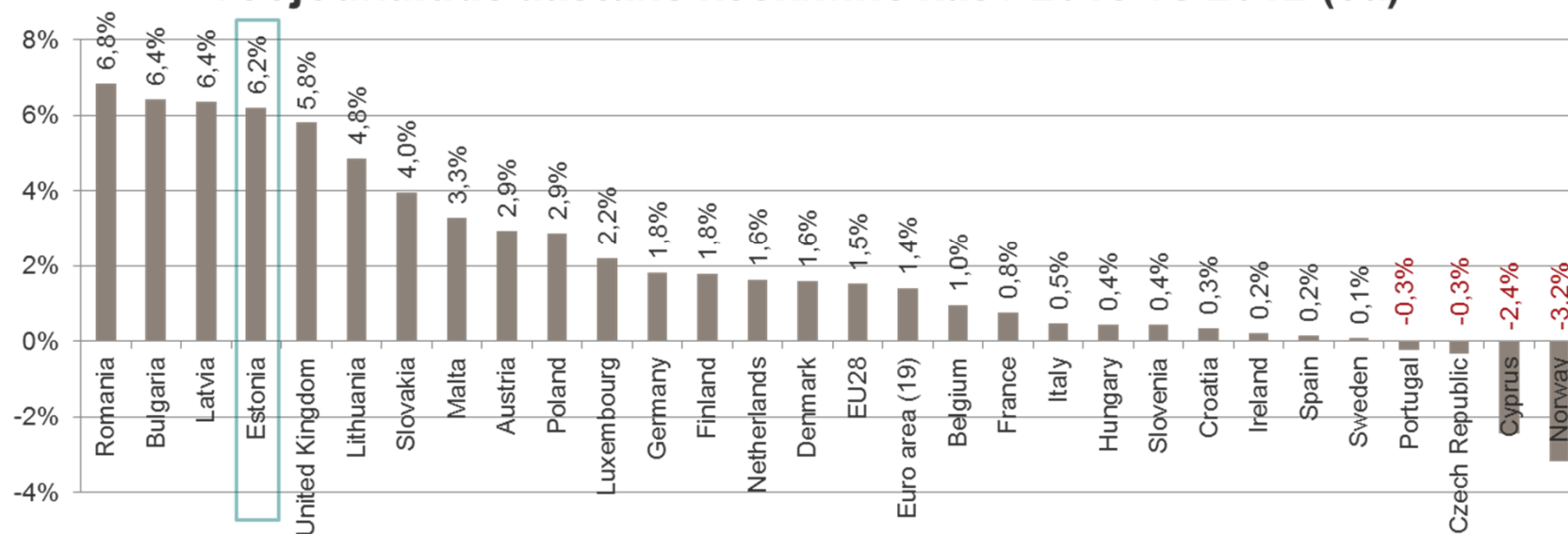
* Rahandusministeeriumi prognoosid, September 2016

- SKP kasv jooksevhindades
- Tegevusalad kokku
- Töötlev tööstus

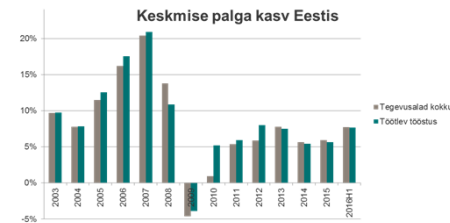
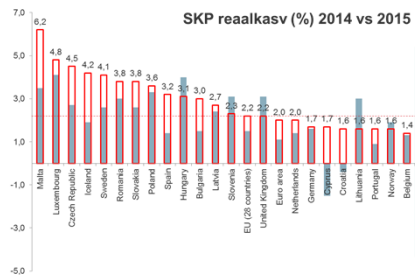
Allikas: Statistikaamet



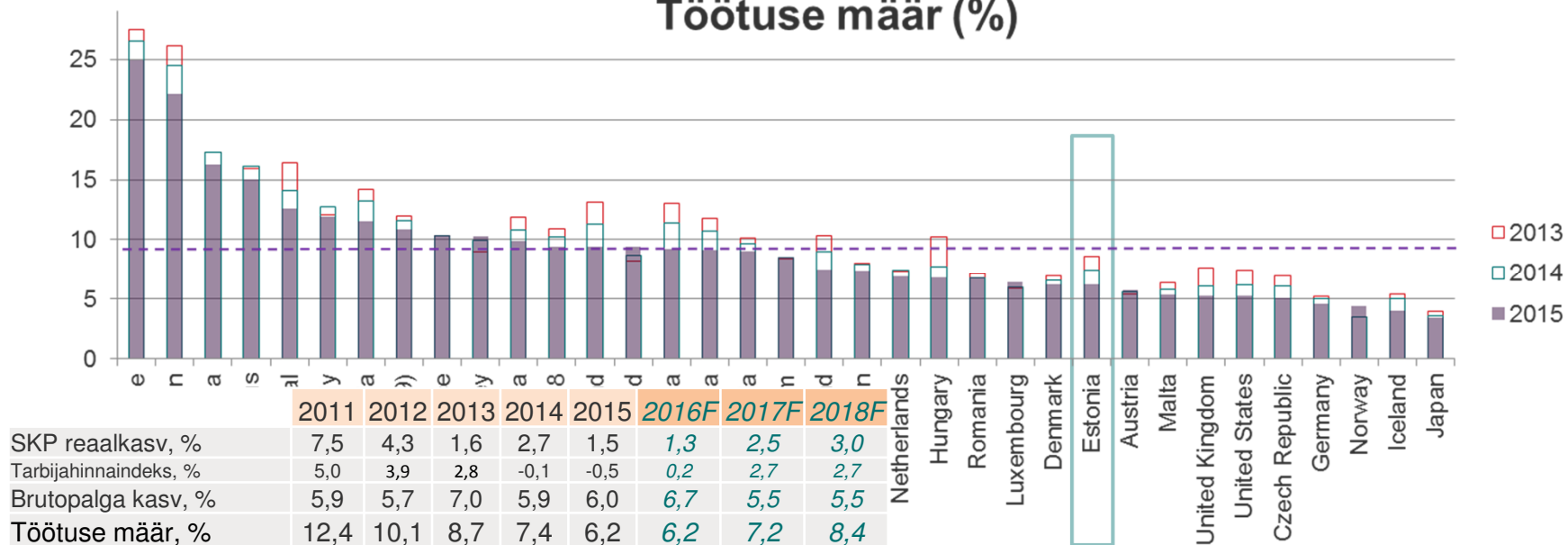
Töõjõukulude aastane keskmine kasv 2015 vs 2012 (3a)



Allikas: Eurostat



Töötuse määr (%)

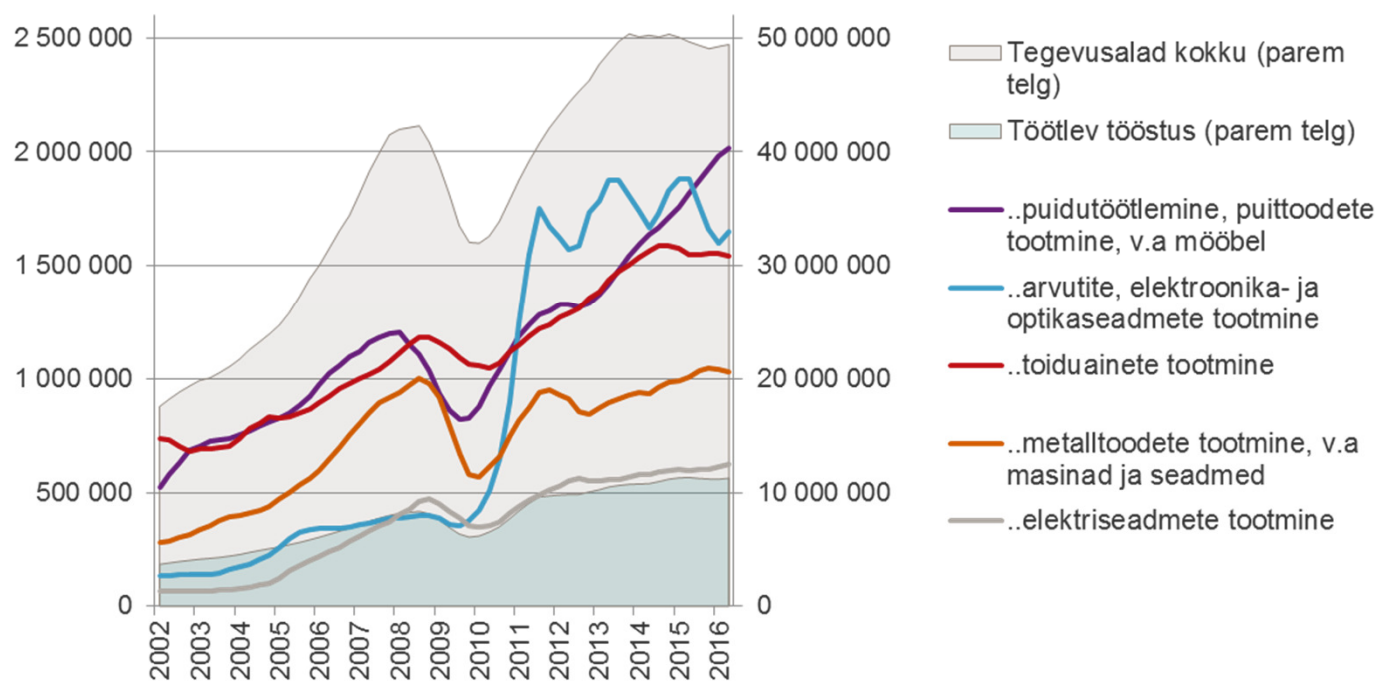


	2011	2012	2013	2014	2015	2016F	2017F	2018F
SKP reaalkasv, %	7,5	4,3	1,6	2,7	1,5	1,3	2,5	3,0
Tarbijahinnaindeks, %	5,0	3,9	2,8	-0,1	-0,5	0,2	2,7	2,7
Brutopalga kasv, %	5,9	5,7	7,0	5,9	6,0	6,7	5,5	5,5
Töötuse määr, %	12,4	10,1	8,7	7,4	6,2	6,2	7,2	8,4

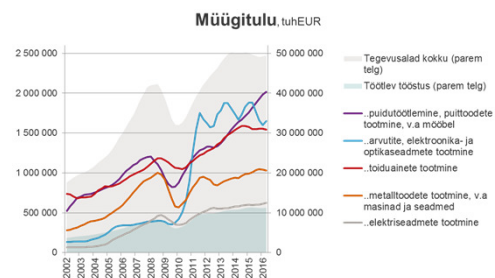
* Rahandusministeeriumi prognoosid, September 2016

Allikas: Eurostat

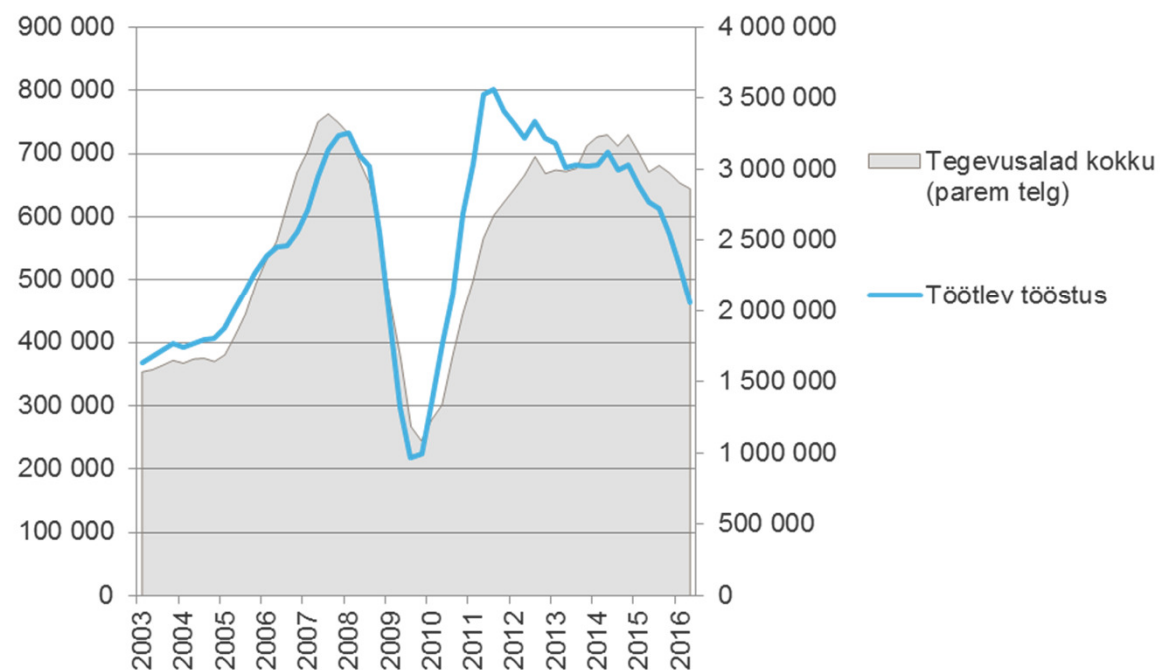
Müügitulu, tuhEUR



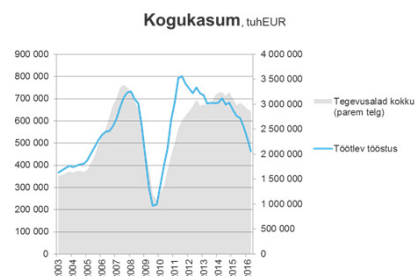
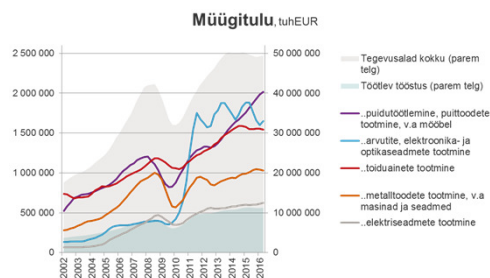
Allikas: Statistikaamet



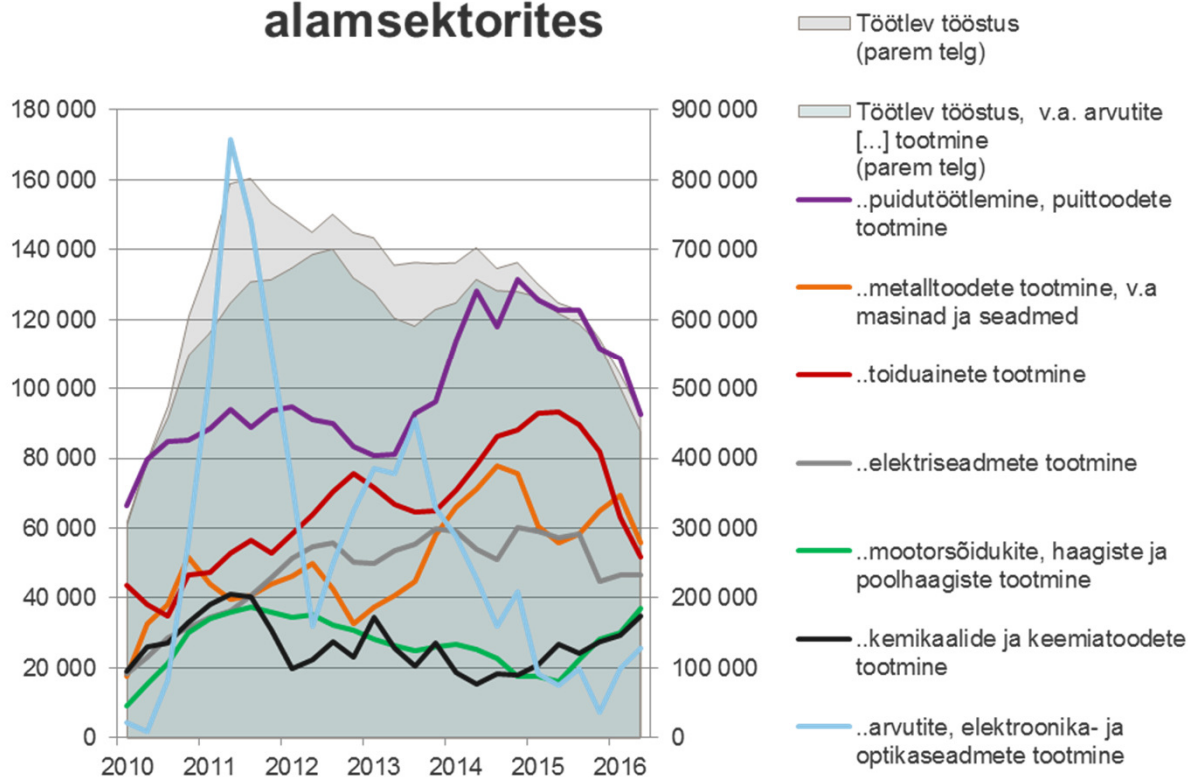
Kogukasum, tuhEUR



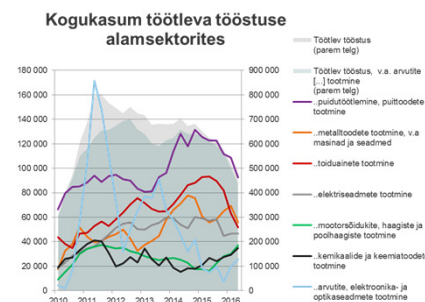
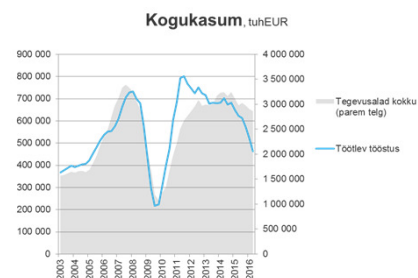
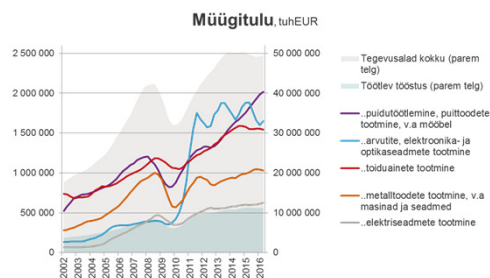
Allikas: Statistikaamet



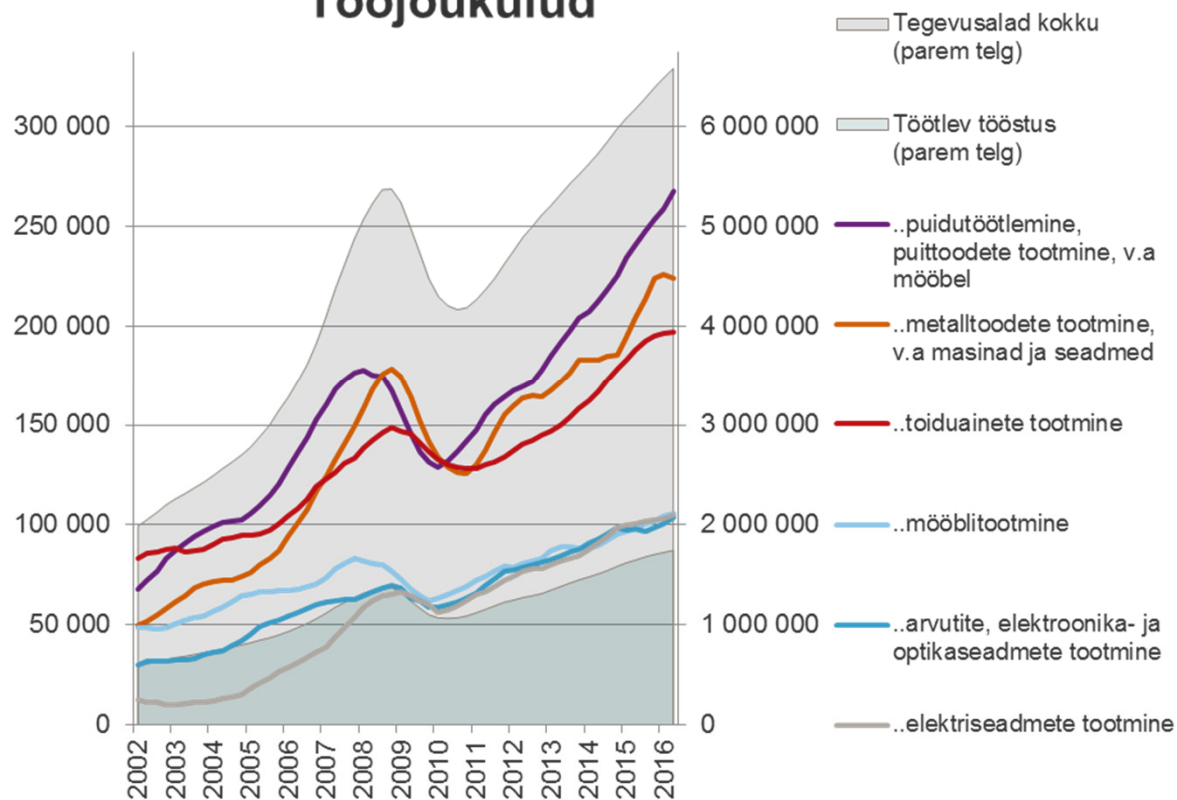
Kogukasum töötleva tööstuse alamsektorites



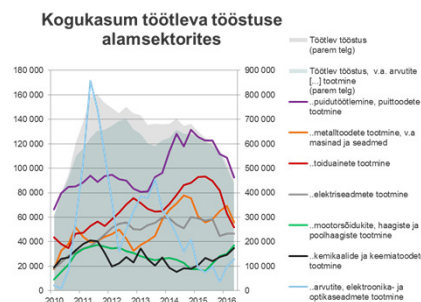
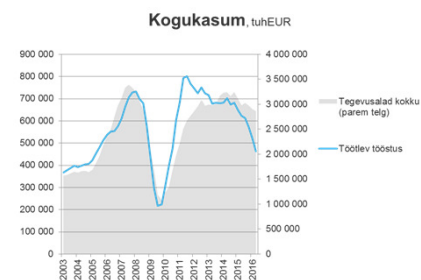
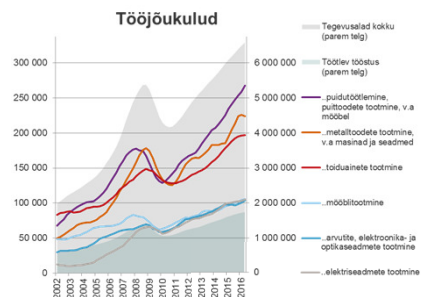
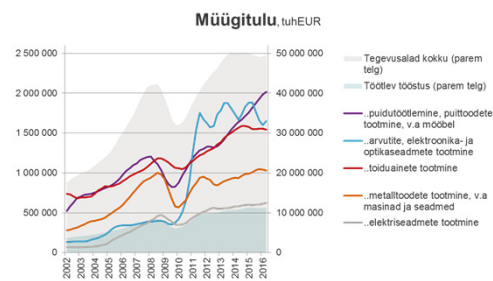
Allikas: Statistikaamet



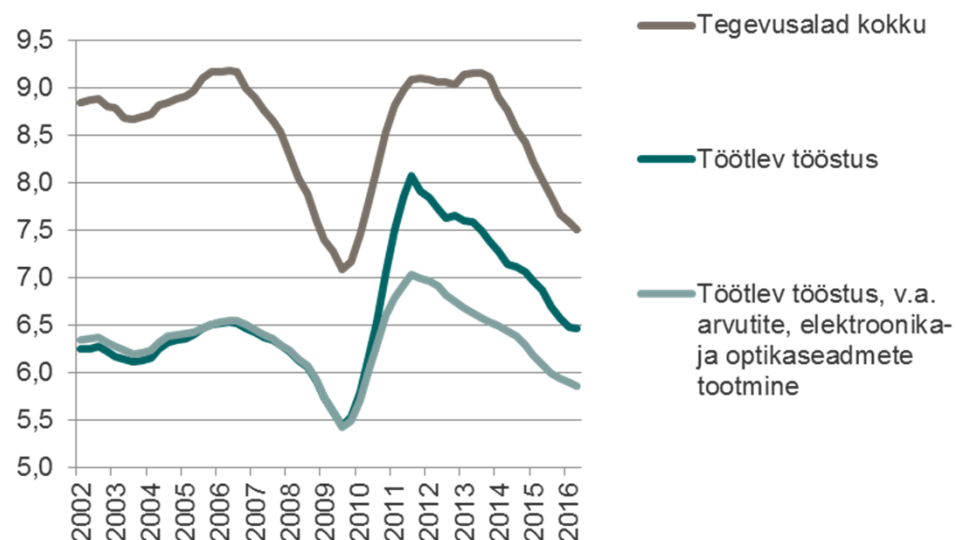
Töøjõukulud



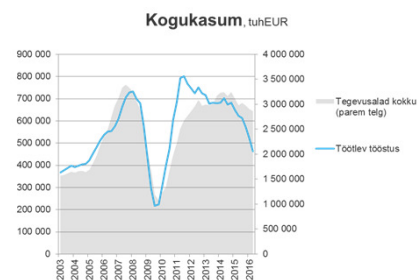
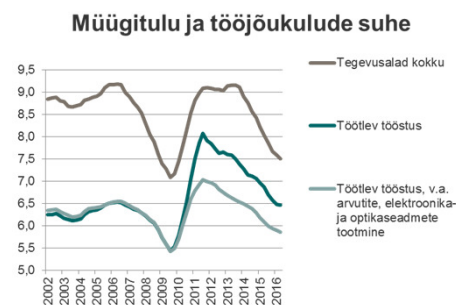
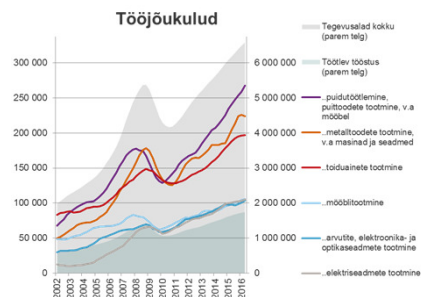
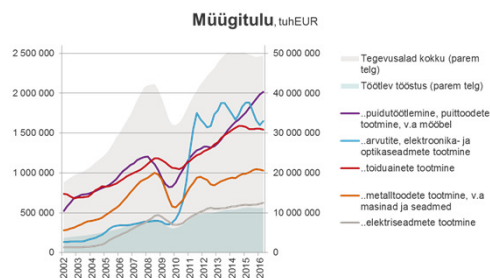
Allikas: Statistikaamet



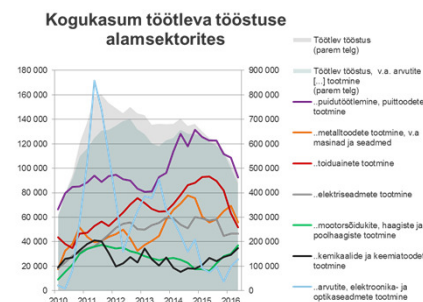
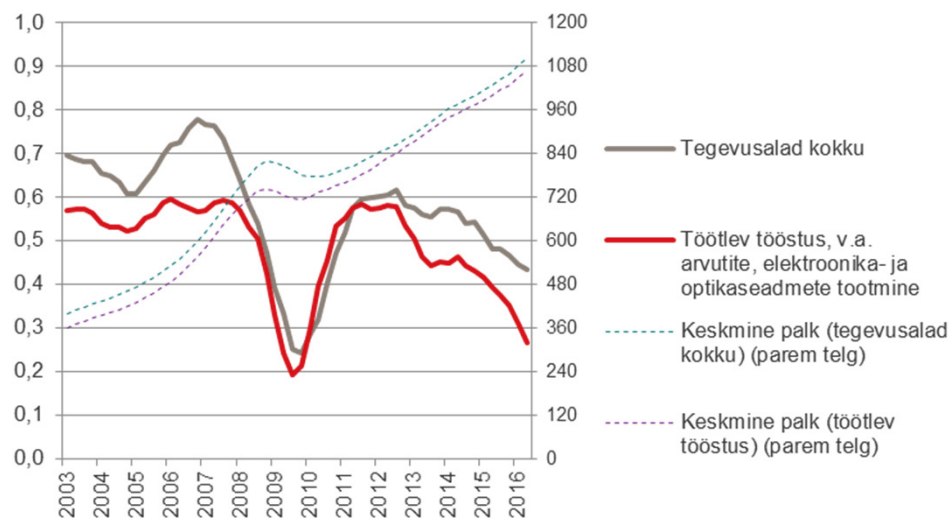
Müügitulu ja tööjõukulude suhe



Allikas: Statistikaamet

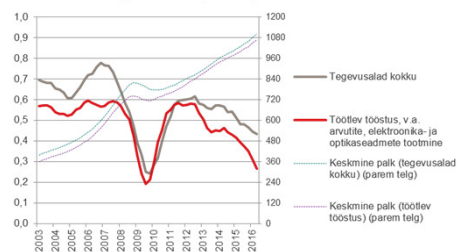


Kogukasumi ja tööjõukulude suhe

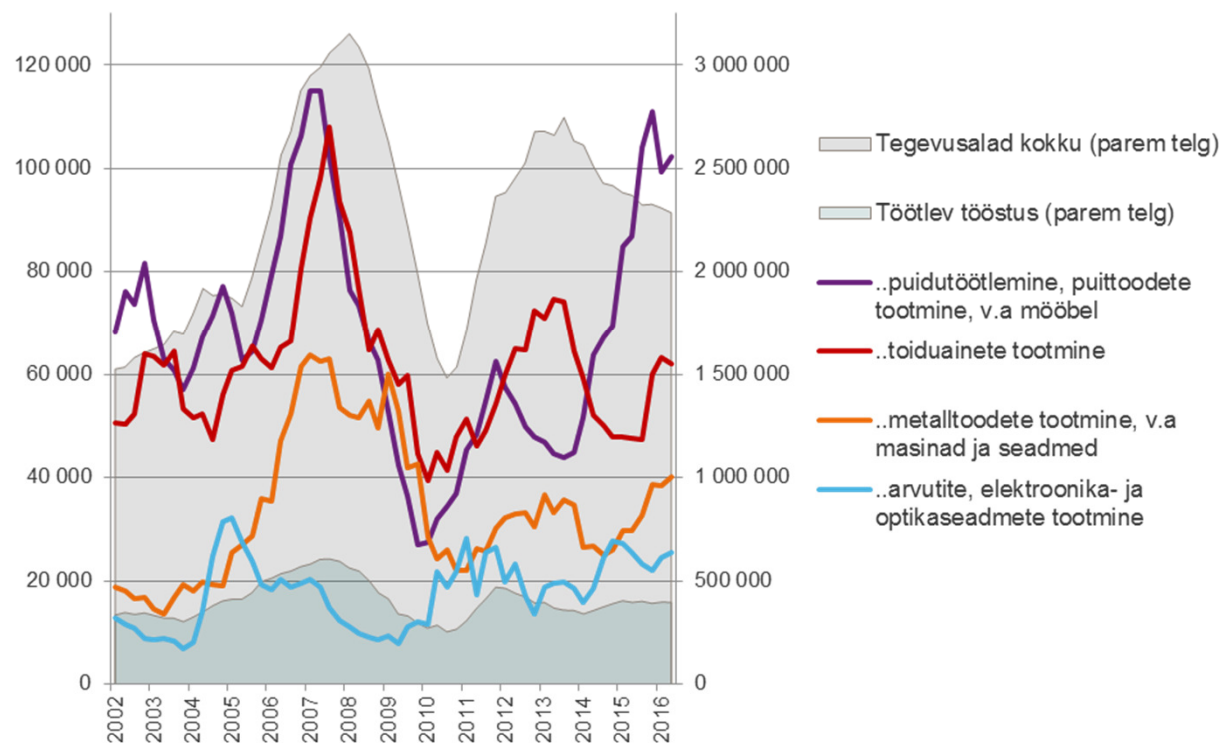


Allikas: Statistikaamet

Kogukasumi ja tööjõukulude suhe

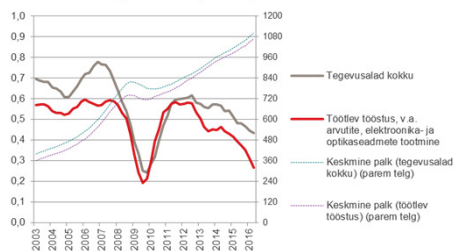


Investeeringud materiaalsesse põhivarasse

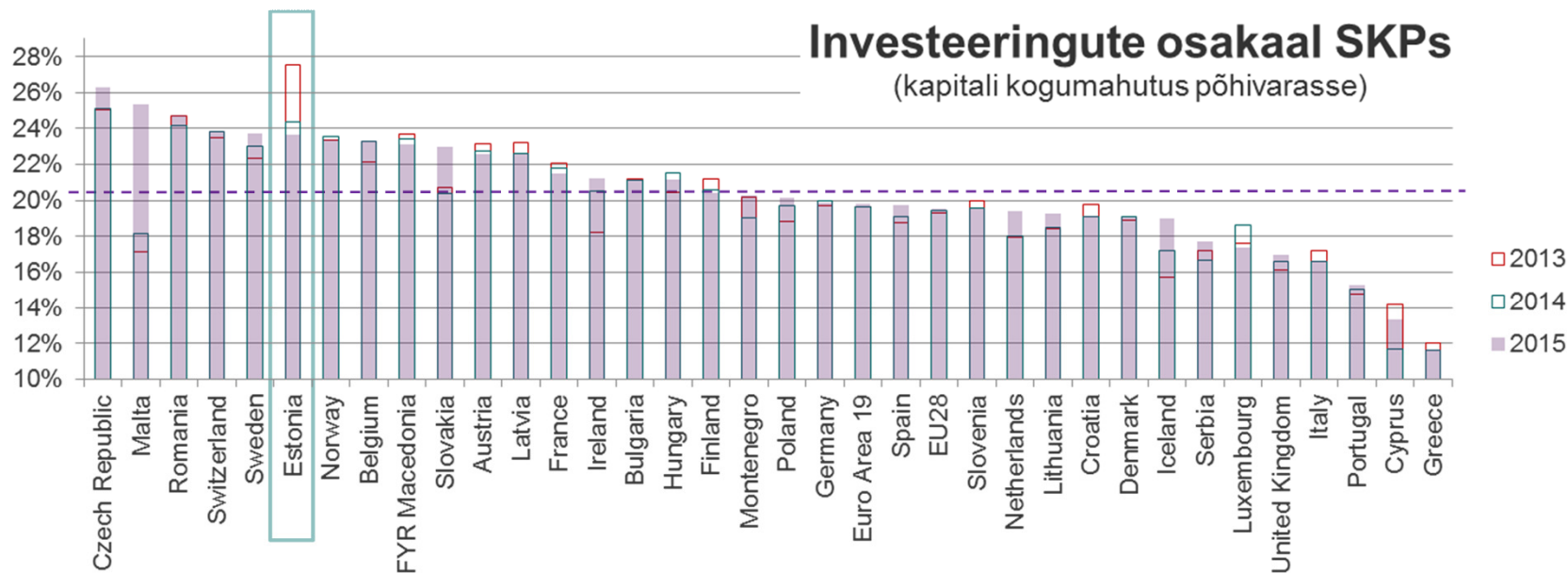
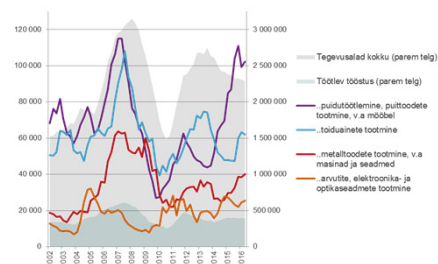


Allikas: Statistikaamet

Kogukasumi ja tööjookulude suhe

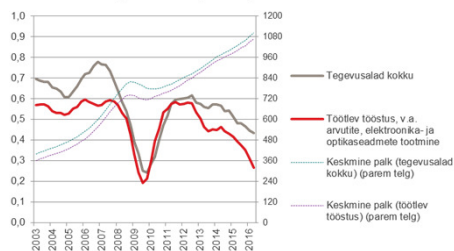


Investeeringud materiaalsesse põhivarasse

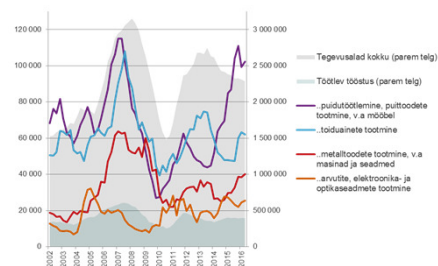


Allikas: Eurostat

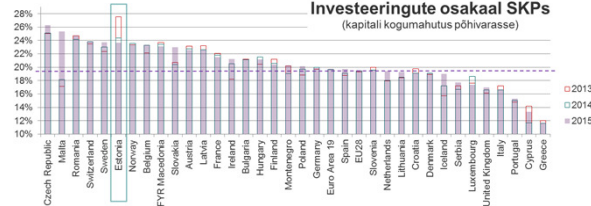
Kogukasumi ja tööjookulude suhe



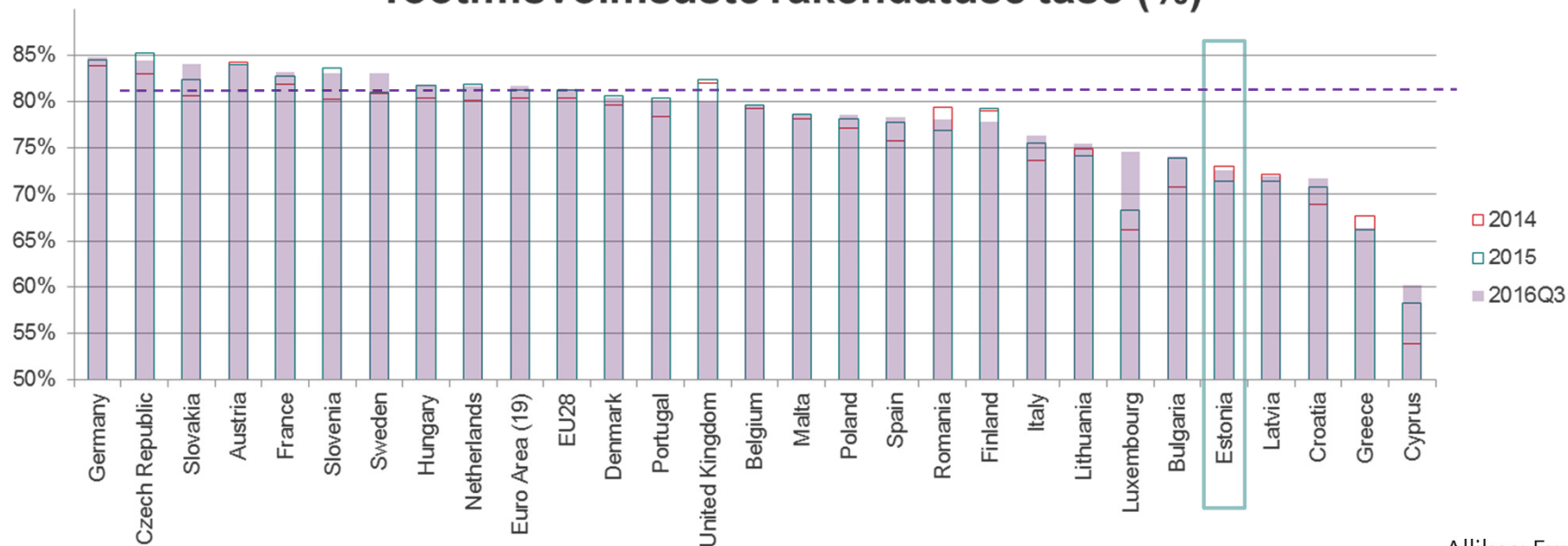
Investeeringud materiaalsesse põhivarasse



Investeeringute osakaal SKPs (kapitali kogumahutus põhivarasse)



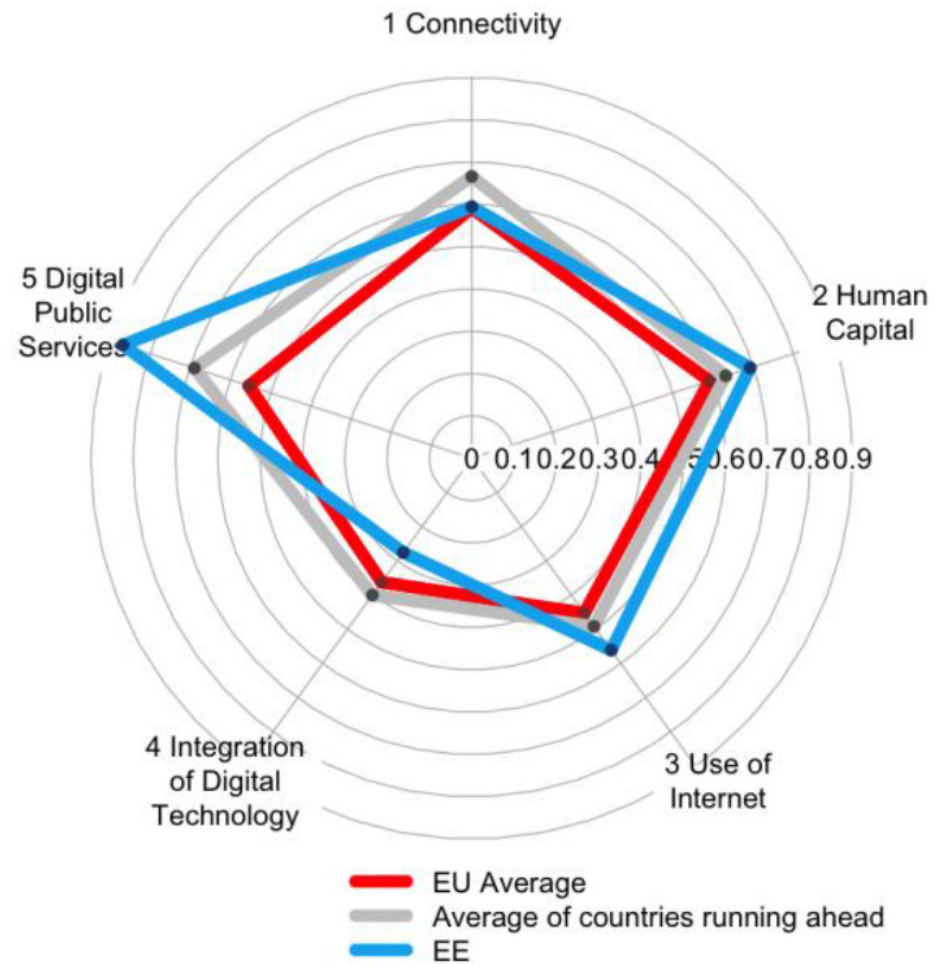
Tootmisvõimsuste rakendatuse tase (%)



Allikas: Eurostat

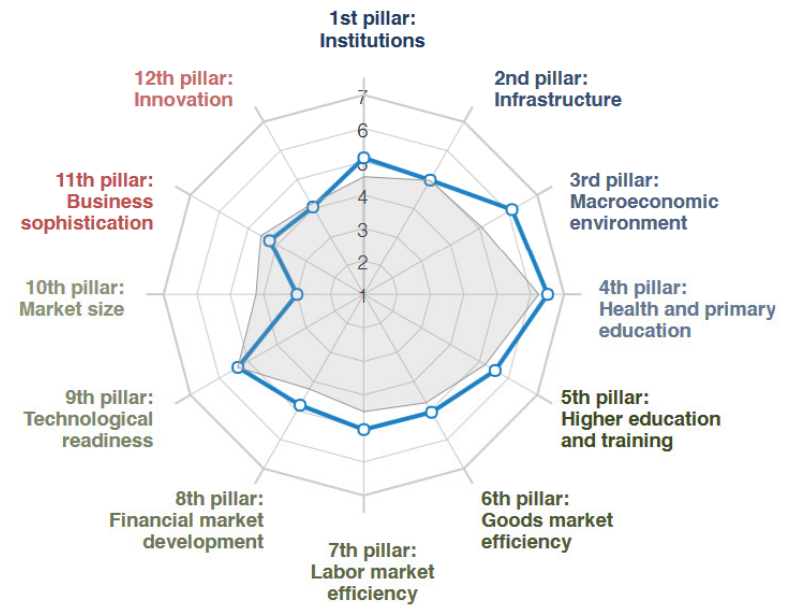
Euroopa Komisjoni Digitaalmajanduse ja -ühiskonna indeks (DESI)

Eesti üldine hinne 0,59
28 ELi riigi seas 7. kohal



Maailma Majandusfoorumi (WEF) globaalne konkurentsivõime indeks 2016-2017

	Rank / 138	Score (1-7)	Trend	Distance from best	Edition	2012-13	2013-14	2014-15	2015-16	2016-17
Global Competitiveness Index	30	4.8			Rank	34 / 144	32 / 148	29 / 144	30 / 140	30 / 138
Subindex A: Basic requirements	20	5.7			Score	4.6	4.7	4.7	4.7	4.8
1st pillar: Institutions	23	5.1								
2nd pillar: Infrastructure	33	5.0								
3rd pillar: Macroeconomic environment	12	6.1								
4th pillar: Health and primary education	12	6.5								
Subindex B: Efficiency enhancers	28	4.8								
5th pillar: Higher education and training	18	5.5								
6th pillar: Goods market efficiency	20	5.1								
7th pillar: Labor market efficiency	15	5.0								
8th pillar: Financial market development	22	4.8								
9th pillar: Technological readiness	32	5.4								
10th pillar: Market size	100	3.0								
Subindex C: Innovation and sophistication factors	33	4.2								
11th pillar: Business sophistication	44	4.3								
12th pillar: Innovation	28	4.1								



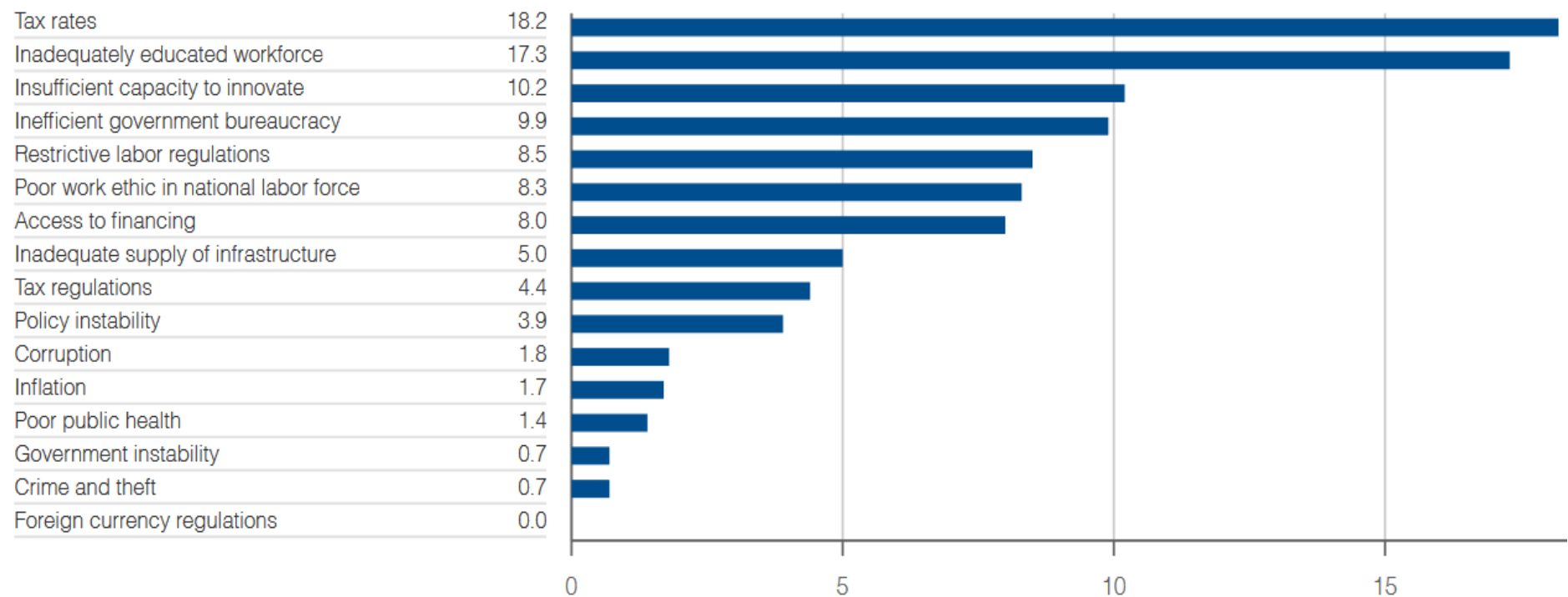
■ Estonia ■ Europe and North America

Maailma Majandusfoorumi (WEF) globaalne konkurentsivõime indeks 2016-2017

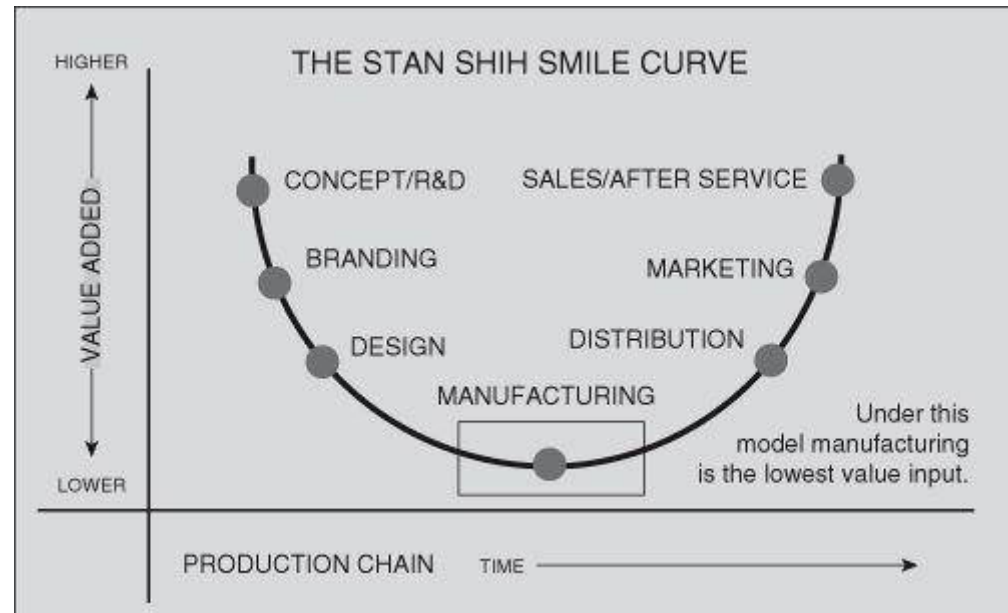
Estonia

Most problematic factors for doing business

Source: World Economic Forum, Executive Opinion Survey 2016



Lisandväärtuse tasemed väärtusahela erinevates lülides



Stan Shih, Aceri looja, 1992

Kokkuvõte

- tööjõukulud kasvavad edasi, tööjõupuudus
- majanduskasv on tagasihoidlik
- käibed stagneeruvad, kasumid langevad
- tööjõukulude efektiivsus kiires langustrendis
- struktuurse muutuse vajadus majanduses ilmne
- kulude kokkuhoid?
- väärtusahelas liikumine? („naeratah kõver“)
- automatiseerimine/digitaliseerimine vajalik (Industry 4.0)
- tööjõu kõrgem kvalifitseeritus – haridussüsteem (kõrg- ja kutseharidus, täiendkoolitus)
- välistööjõud? riiklik regulatsioon ning tugiteenused?
- targad investeeringud – koostöö pankade jt finantseerijatega

Tööjõukulude mõju Eesti tööstusettevõtetele



Priit Roosimägi, vanemanalüütik
priit.roosimagi@dnb.ee

17.11.2016