



1918

TALLINNA TEHNIKAÜLIKOOL  
TALLINN UNIVERSITY OF TECHNOLOGY

# Estonian boatbuilding 2003-2006-2009

Anni Hartikainen



Euroopa Liit  
Euroopa  
Regionaalarengu Fond



Eesti tuleviku heaks

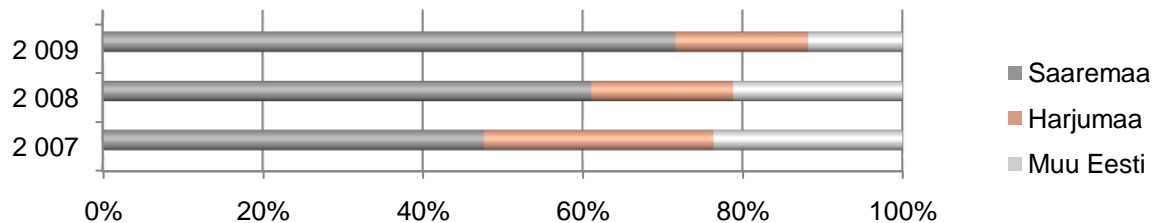


ASSOCIATION OF ESTONIAN  
BOATYARDS

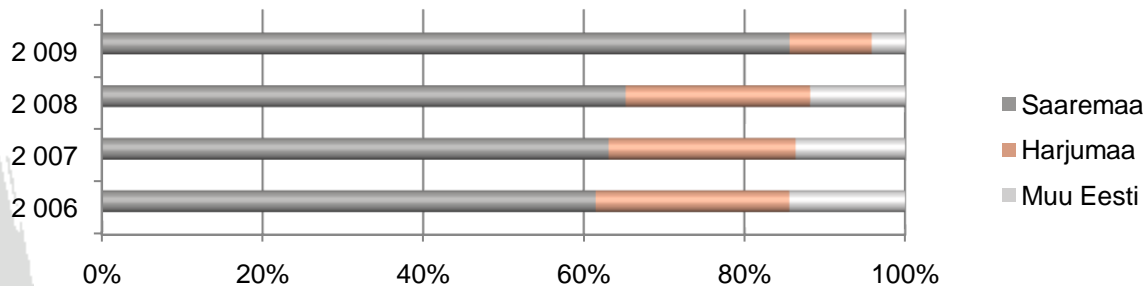
- 
- ✓ **Estonian small craft sector**
  - ✓ **Comparison to Nordics**
  - ✓ **Grow-how**

# Concentration to Saaremaa 86% in turnover

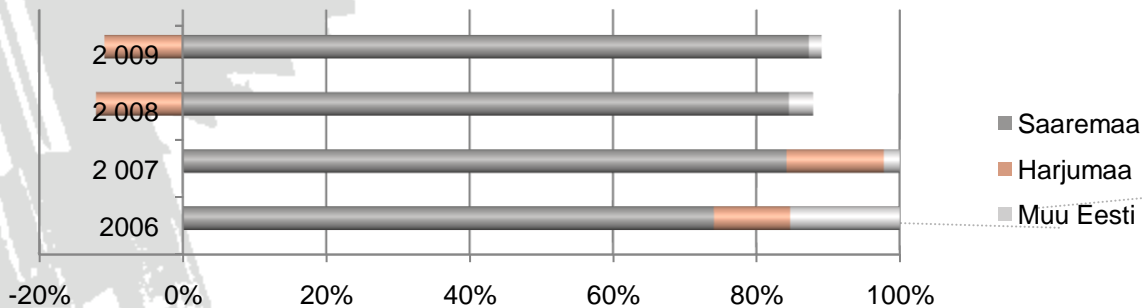
## Number of employees



## Turnover from sales

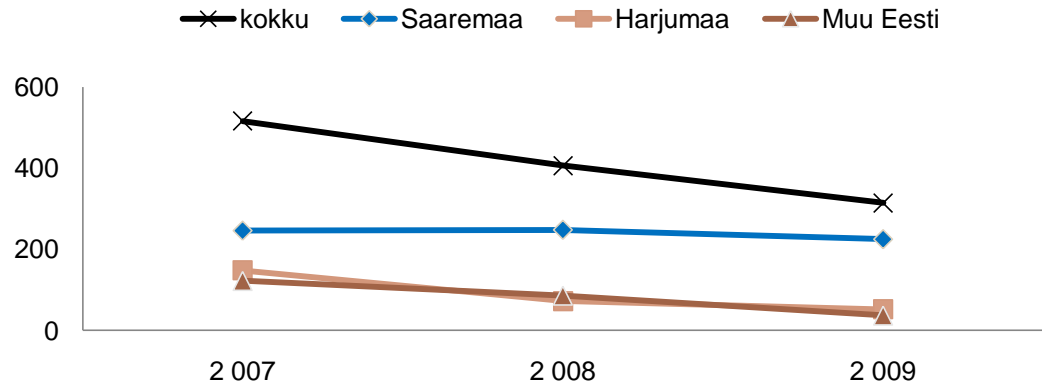


## Profit

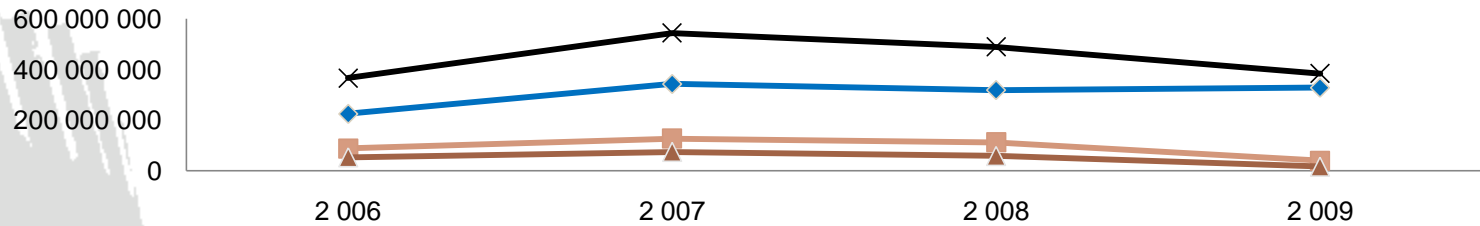


# Crisis survived

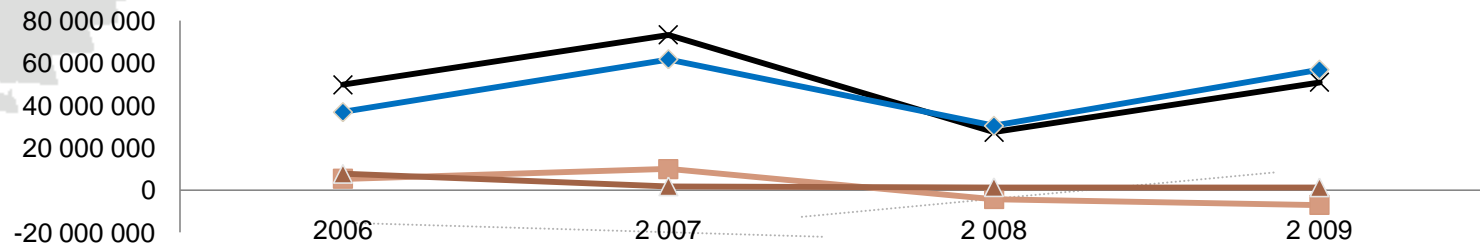
## Number of employees



## Turnover from sales



## Profit

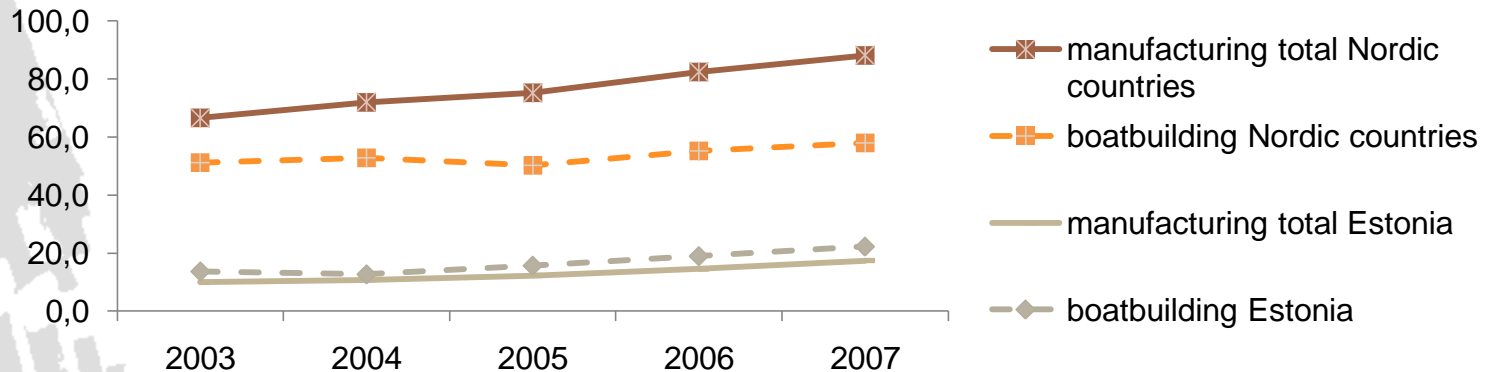


# Small in size, remarkable in proportions

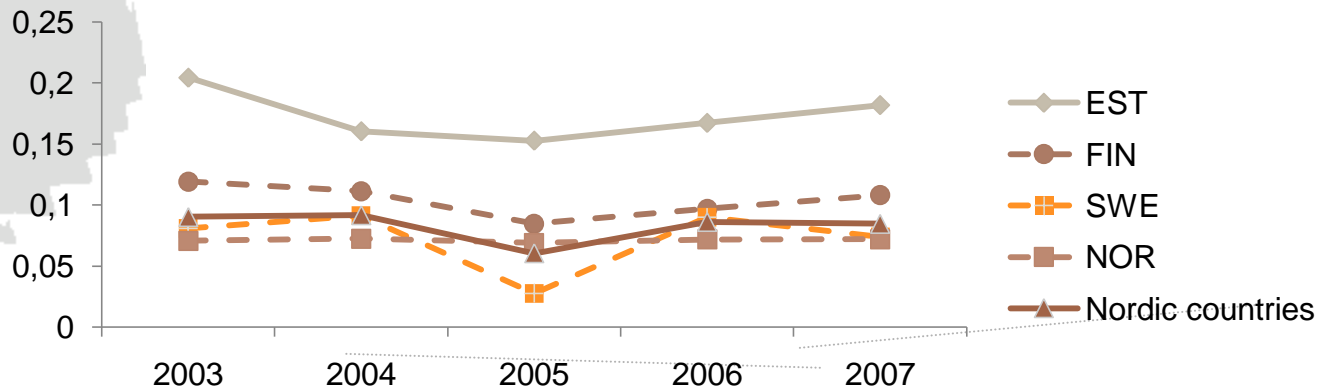
Characteristics as of the year 2007	EST	LAT	LIT	FIN	SWE	NOR
Number of enterprises	41	24	11	483	1145	438
Number of persons employed per enterprise	10	9	21	6,5	3,0	4,4
Personnel costs per employee (thousand euro)	10,3	10,7	9,9	37,6	37,5	52,0
Share of personnel costs in production (%)	15,3	19,7	17,1	23,2	22,1	22,7
Share of turnover in manufacturing total (%)	0,3	0,2	0,1	0,3	0,3	0,4

# Encouraging comparison with Nordics

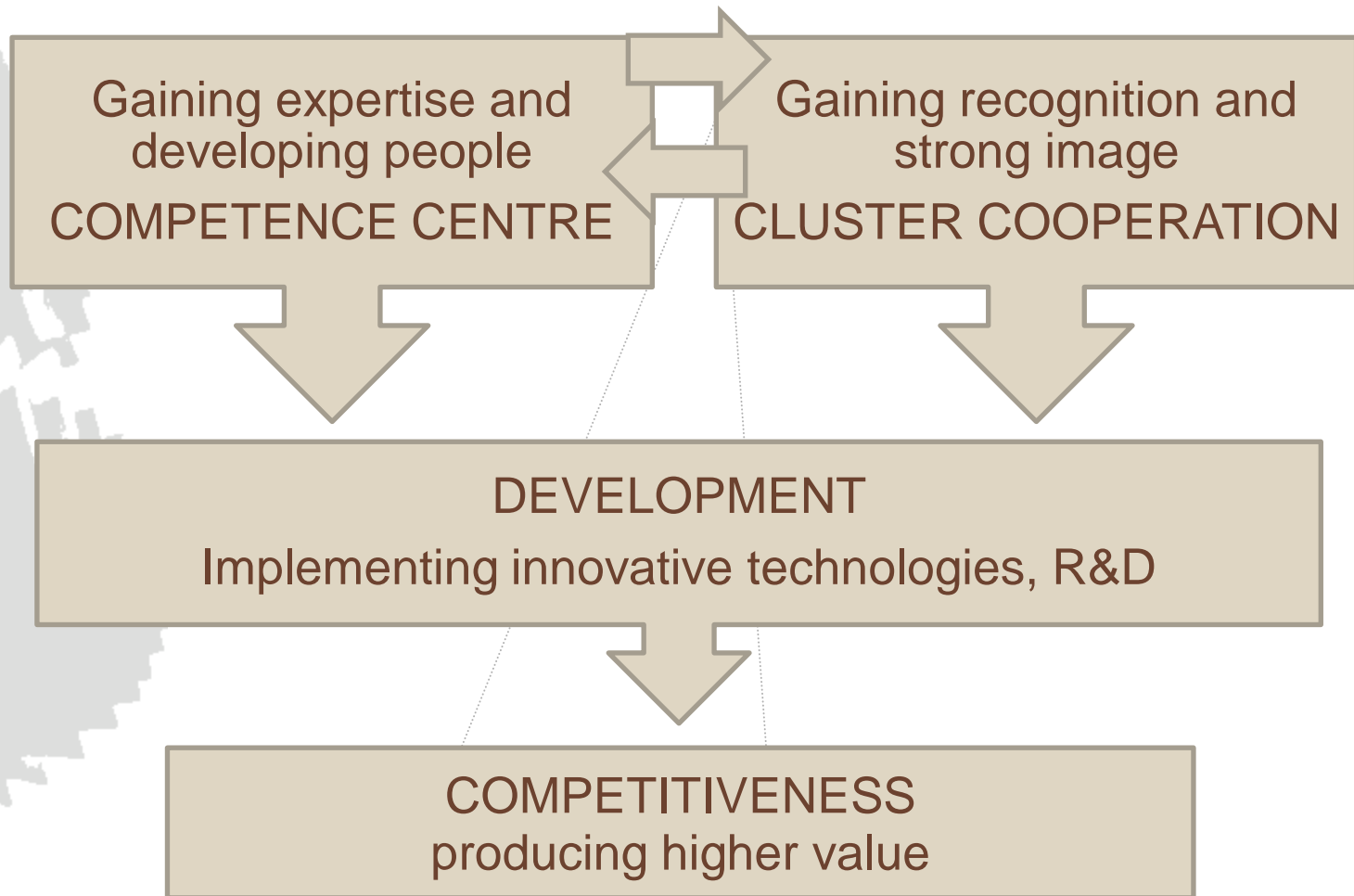
## Gross value added per employee



## Profitability of building boats



# Grow-how?



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# Sectors enterprises



Luksusjaht  
Estmerel  
Welcomest  
...

# Cooperation organisations



West-Estonian Islands Partnership  
Islands Fisheries  
Association of Saaremaa Entrepreneurs  
EstBoat  
Federation of Estonian Engineering Industry

# Public sector



Saare county government  
Association of Saaremaa Municipalities

# Local Municipalities:

Muhu  
Orissaare  
Kaarma

**Kuressaare**

Alunaut  
Flow Boat Baltic Workboats  
Ranna Plast Kasse Paadid  
Pro Marine Trade Lindvart  
Vätta Puupaadiselts Saare Paat  
Muvor Tekno Marine Eesti  
Hilmaa Britamarine Vätta Puit  
Väike Paadivabrik  
Kompas



INNER CIRCLE: members of Estonian Boatyards

MIDDLE CIRCLE: clusters partners, not members of Estonian Boatyards

**TUT Kuressaare College**

**Kuressaare RTC**

**Estonian Maritime Academy**

**Tallinn University of Technology**

# Facilitators



Saaremaa Business Developing Foundation  
Enterprise Estonia  
Saaremaa Environmental Investment Centre  
PRIA

Local newspapers  
Maritime magazines and portals

# Media



# Educational institutions

