

## **Töövõtulepingu: „Saaremaa väikelaevaehituse investeringustrateegia loomine ja elluviimine“ 2 etapi aruanne ja tulemid**

2. etapp: Saaremaa väikelaevaehituse atraktiivsust ja ärivõimalusi tutvustava materjali koostamine.

Väärtuspakkumise koostamise eesmärgiks on aidata kaasa Saaremaa väikelaevaehituse sektori edasisele rahvusvahelistumisele läbi:

- investeringute kaasamise,
- piiriülese strateegilise partnerluse
- koostöö koolituse-, uuringute ja arendustegevuse valdkondades

Etapi tulemiks on väärtuspakkumine suunatuna välisinvestoritele- ja potentsiaalsetele koostööpartneritele Läänemere regioonis.

Väärtuspakkumise koostamise lähtealusteks on projekti esimese etapi tulemusena kujunenud arusaamad:

- majandusolukorrast Läänemere regiooni väikelaevaehituse sektoris ja ettevõtete strateegilistest valikutest kriisiolukorrast väljumisel (ühinemised ja ülevõtmised, tootmise üleviimine soodsamasse majanduskeskkonda, uued ärimudelid jt.),
- Saaremaa tugevustest ja väikelaevaehituse sektori kui terviku arenguvajadustest ja jätkusuutlikkuse eeldustest,
- Saaremaa ettevõtjate, koolitus- ja arendusorganisatsioonide ning välismaiste partnerite ühistest huvidest ja võimalustest seotuna avalike huvidega,

Äri- ja koostöövõimalusi tutvustava väärtuspakkumise proaktiivsel tutvustamisel peame silmas järgmisi võimalusi:

Elektroonilisel kujul:

- EAS-i rahvusvahelistumise divisjoni kodulehel eraldi dokum . Lisaks lühitekst Eesti masinaehitust tutvustavale lehele.
- SAK-i, VLE kompetentsikeskuse kodulehtedele, KOV-ide kodulehtedele

- Lingid Saaremaa VLE ettevõtete ja teiste VLE Klatri liikmete ning Eesti VLE assotsiatsiooni kodulehtedele.

#### Paber kandjal:

- Otsepostitus Läänemere regiooni vle sektori ettevõtetele (valik esimese etapi tulemusena koostatud ettevõtete andmebaasist).
- Eesti rahvapurjeka konkursi käigus disainibüroodele saadetavate materjalide paketi osana.
- Eestisse investeerimise võimalusi tutvustavatel seminaridel ja messidel.
- EAS-i stendidel ja huvilistele jagatavate materjalide hulgas EAS-i peamajas ja välisesindajate kontorites.
- Eesti aukonsulite kasutuses.
- VLE rahvusvahelistel messidel
- Vastavalt vajadusele Saaremaa VLE ettevõtjate kasutuses.

#### Formaat, ja paber kandjal väärtuspakkumise tiraaz

Väärtuspakkumise formaadiks pakume kuuekülgelise voldiku, kus teemad lehekülgede kaupa on järgmised:

1. Tiitel ja moto-tsitaat
2. Saaremaa VLE edulugu, arengut iseloomustavad arvud. Läänemere regiooni VLE kaart näitamaks Saaremaa keskset (soodsat) positsiooni peamiste tootmispiirkondade ja –turgude suhtes.
3. Miks Saaremaa: peamised tugevused, argumendid. Kvaliteeti ja mitmekesisust iseloomustavad näited ja pildid
4. Investeerimis- ja äri võimalused Saaremaa VLE sektoris (väärtusahelas) Kombinatsioonina välispartnerite tõenäolistest huvidest ja Saaremaa võimalustest.
5. Roomassaare sadamapiirkonna kaart olemasolevate ettevõtete ja arendatavate tootmisalade tutvustusega.
6. Investorteenuste (EAS, SAK) ja avaliku sektori toe tutvustus ning kontaktandmed

Disainilahenduse tegemiseks anname oma soovitusi piltide või graafiliste materjalide valiku osas.

Sidusus EAS Rahvusvahelistumise Divisioni ja SAK-i materjalidega  
(kodulehekülgedega)

Väärtuspakkumine peab olema loetav eraldiseisva materjalina ja moodustama loogilise terviku. Samas ei tohi see olla liialt mahukas ja sisaldada ajas kiirelt muutuvat informatsiooni. Seetõttu on põhimõtteks väärtuspakkumise linkimine EAS-i kodulehe investoritele oluliste teemadega nagu Eesti üldine investeerimiskliima, Eesti konkurentsieelised, kulude struktuur, maksu- ja juriidilisi küsimused jt. Saaremaa majandus- ja elukeskkonna osas on toodud lingid SAK-i kodulehele.

Orienteeruv tiraaz paberkandjal võiks olla 500 eksemplari. Planeeritav kasutusperiood üks aasta, mille järel on vajadus informatsiooni värskendada. (eeskätt sektori majandustulemusi ja atraktiivesid projekte iseloomustavava teabe osas)

Saaremaa väikelaevaehituse väärtuspakkumine:

## Business opportunities in Saaremaa small craft building

"The Oeselians, neighbors to the Kurs (Curonians), are surrounded by the sea and never fear strong armies as their strength is in their ships.

(Livonian Rhymed Chronicle 1180 – 1290)

Saaremaa has been famous for centuries due to its maritime history and shipbuilding traditions.

Today the small craft building sector forms a core of Saaremaa Economy ([link saaremaad ja selle majandust tutvustavale materjalile](#))



## From centuries-old traditions to the successful small craft building cluster today

- The advantage of boat building in Saaremaa based on the marine way of thinking and traditions of the past as well on modern skills, high quality standards and success in export markets.
- Saaremaa small craft building is characterized by a diversified production range: output vary from the renovation of old wooden boats to the modern high end yachts and workboats.
- Saaremaa boatbuilders and subcontractors have formed a Small Craft cluster which represents the core of the Association of Estonian Shipyards [www.smallcraft.ee](http://www.smallcraft.ee) - the member of European Boating Industry.

Saaremaa boatbuilding sector is growing and profitable despite of the Global Economic Downturn.

|   | 2009 | 2010 | 2011  |
|---|------|------|-------|
| Turnover (mil.€)                          | 21,3 | 27,8 | 33,7* |
| Export (mil.€)                            |      |      | 29,0* |
| Net profit (mil.€)                        | 3.6  | 5,4  | 5.6*  |
| Investments to the capital assets (mil.€) | 1,6  | 5,4  | 5,7   |
| Nr. of employees                          | 221  | 282  | 288   |

\*Year 2011 Small craft production in Saaremaa formed 80% of the sector turnover, 85% of exports and 92% of net profit in Estonia.

15 companies are active in small craft business in Saaremaa.

The variety of products is characterized by the products of major companies

| company             | Products and brands   |
|---------------------|---|
| Baltic Workboats AS | Aluminium and steel workboats. Clients:                           |
| Luksusjaht AS       | Recreational sailing- and motor yachts. Brands: Arcona, Delta     |
| Saare Paat AS       | Recreational sailing- and motor yachts. Brands: Saare 38, Stormer |
| Alunaut OÜ          | Aluminium sailing- and motor yachts, rebuilding and maintenance   |
| Vätta Puit OÜ       | Renovation and maintenance of wooden boats                        |

|                 |  |
|-----------------|--|
| Lindvart OÜ     | Recreational sailing- and motor yachts, rebuilding and maintenance |
| Kasse Paadid OÜ | Fishing and rowing boats. Original trademark: Kasse 430            |

Saaremaa has a perfect location in the middle of the Baltic Sea region.



## Cost advantage

Estonian advantage is a cost-effective and flexible labour market and and business-friendly taxation environment.

- Labour relations are flexible depending on market situation. The average monthly wage in Estonia in 2011 was EUR 830. The influence of trade unions in private businesses is weak.
- Estonian taxation system is simple and transparent. There is a general flat income tax (currently 21 percent) which applies to private individuals' earnings. There is no corporate profit tax, instead the flat 21 percent tax is withheld when profits are distributed, e.g. as dividends. Social fees are levied at a rate of 33 percent of gross wages, but sick- and maternity leave costs are covered by the state. Estonia's value-added tax rate is 20% . For more details look at

[www.investinestonia.com](http://www.investinestonia.com)

## Well functioning infrastructure

- Modern and internet and mobile networks correspond for the most demanding business needs
- Saaremaa, being the largest island in Estonia, has a flight connection as well fast (30 min.) ferry connection with the mainland. [viide](#)
- There is a deep sea port for service cruise ships and network of small harbours for sailing- and motoryachts [viide](#)
- Development areas for construction of manufacturing or for instance boats winter storage and service facilities are available. [Look at the map of Kuressaare City, Roomassaare Peninsula.](#)

### Island of boatbuilders

- Boatbuilding in Saaremaa is highly competitive especially in small series production and in realization of innovative projects because of hard-working people with exceptional skills and experience in small craft

The [growth of skilled workers and specialists](#) is ensured by the local educational institutions:

- Kuressaare Regional Training Centre - Vocational training of small craft builders in tight cooperation with local boatbuilding companies.  
[www.ametikool.ee](http://www.ametikool.ee)
- TTÜ Kuressaare Kolledz - Applied higher education and further training in small craft building speciality.  
[www.ttykk.edu.ee](http://www.ttykk.edu.ee)

### Support to the knowledge growth, research and development

- The Small Craft Competence Centre in Saaremaa is established for involvement modern knowledge and attracting top professionals into the development of competitive small craft cluster.

Competence Centre will be fully operational by the year 2014 to provide support for companies in:

- Design, production and testing of small craft models and equipment.
- Implementation innovative ideas and organizing special trainings

### Open and friendly business environment

- Due to the long term existence of foreign business community in Saaremaa and massive flow of foreign tourists people in Saaremaa are fluent in different languages and the business culture is close to the Finnish-Swedish one.
- Friendly living environment
- Saaremaa small craft industry is well integrated with the Baltic Sea region markets via procurement and export logistics.

### Business opportunities in Saaremaa (investments)

- Investment into growing companies. M&A opportunities
  - Small craft building:
  - Manufacturing of boats/sailing components and accessories
- Greenfield investment opportunities for extending or relocating manufacturing in favorable environment
  - Small craft building, components and accessories construction ( manufacturing of yacht keels, sails, stainless steel fittings, furniture fittings, marine electronics etc.)
  - Small craft winter storage and maintenance center

### Business opportunities in Saaremaa (strategic partnership)



- OEM / Subcontracting
  - small or medium series aluminium boats/yachts: powerboats, work boats, sailing yachts
- Opportunities for Dealers
  - Marketing and sales of Saaremaa small craft builders own products (original brands)
- Opportunities for design and engineering companies.
  - Fast developing companies in Saaremaa looking for advanced services.
  - Cost-effective opportunities for pilot projects

#### Business opportunities in Saaremaa (design, research and development)

The Small Craft Competence Centre looking for cooperation and mutual business opportunities with foreign Universities, research institutions and companies. The two main R&D headings of the Centre are:

- sustainability of the environment (e.g. application of organic composite materials; control systems for optimising use of energy etc.) and
- intelligent control systems (e.g. integration of control devices; embedded systems etc.).

In material-development, the focus is on the application of natural materials in lamination technology, which can result in producing and usage of fully recoverable plastic materials in small craft engineering as well as in other sectors.

For companies the Competence center provides opportunities for product development and trial manufacturing in cooperation with Competence center and local companies. For more details: [www.css.ee](http://www.css.ee)

## Investor/business services and contact in Saaremaa

- Information and investment preparation services
- Investment project management services
- Site identification and evaluation
- Arranging personnel search and assessment
- Advice on project financing
- Selection of project partners and facilitators
- Negotiations with relevant authorities
- Assistance in project implementation
- Investor aftercare services

All services offered by the Saaremaa Development Centre [www.sasak.ee](http://www.sasak.ee) and Estonian and Investment Agency [www.investinestonia.ee](http://www.investinestonia.ee) are free of charge to qualified investors and trade partners.

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