

CREATIVE INDUSTRIES IN TALLINN

TALLINN - HOME FOR BUSINESS



INTRODUCTION

During recent decades, creativity has become one of the keywords in discussions about economic competitiveness. Creativity and culture are beginning to be seen as a way to increase the added value of products, to make the living environment more pleasant and attractive for local residents, businesspeople as well as tourists and investors, but also as an opportunity to create new jobs and increase inclusion and initiative.

In Estonia, discussions about the necessity to develop creative industries gained momentum in 2003-2004. Being predominantly influenced by the British approach, in Estonia creative industries are defined as the economic sector based on individual and collective creativity, skills and talent, which are capable of providing wellbeing and jobs by creating and using intellectual property. The following spheres of activity are included in Estonia's creative industries: architecture, audio-visual, design, theatrical arts, entertainment information technology, publishing, cultural heritage, art, music, and advertising. Unlike many other countries, all parts of the information technology field are not treated as creative industries, and neither are tourism or research and development.

Based on an assessment by the Estonian Institute of Economic Research, in 2007 Estonia's creative industries sector comprised an estimated 3% of Estonia GDP, which is higher than the European Union average (2.6%) (Eurostat, 2007). Compared to Estonia's other

economic sectors, more added value was created in Estonia's creative industries than in any other branch of industry, including energy or financial brokerage.

To date, many support activities have been developed at the national and local government levels, from increasing awareness of creative industries to the establishment of creative incubators and development centres. The growing number of grassroots initiatives and activities (festivals, factories of culture, etc.) demonstrates an increased level of activity in the creative industries sector itself. The creative industries have become a platform that has helped to gather the practitioners and promote the sector as a whole; for instance, during the last few years, the Estonian Design Centre, Estonian Architecture Centre and Estonian Music Development Centre have been established.

The majority of the companies in Estonia's creative industries, as well as the umbrella organizations, are concentrated in Tallinn. As the capital and largest urban area in Estonia, Tallinn is attractive for both creators and consumers due to its large market; also important is the existence of others "like oneself", i.e. a great variety of creative spheres being represented.

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Just like innovation, which develops at the intersection of various fields of activity, success stories in the creative industries are often born when the skills and knowledge of various creative fields meet and close cooperation develops with the industrial and service sectors. In this publication, the creative industry success stories are presented in the fields with the greatest export potential. Thus, the development of the Rotermann Quarter is described as a success story in the field of architecture, while in the advertising and design field, platforms are described that unite various fields of activity or the best competences in the sector.

This publication provides the reader with the path to discover the landscape of Estonia's creative industries and find cooperation partners with whom to jointly implement ideas.

Külliki Tafel-Viia, Silja Lassur
Tallinn University, Estonian Institute for Future Studies



ADVERTISING

1. OVERVIEW OF THE FIELD OF ACTIVITY

Today, advertising is an inseparable part of our daily lives. The professionalism and sales of Estonia's advertising companies have increased in the rapidly developing economic environment. There are 725 companies registered in the advertising sector, of these about 50 are advertising agencies and 10 are media agencies.

Regionally, the largest advertising companies are concentrated without an exception in Tallinn. The leading companies, which are well-known in Estonia and elsewhere in the world include The Division (Division), Adell Taevas (Taevas Ogilvy), Tank Group (DER Tank), Kontuur LB (Kontuur), Age Reklaam (AgeMcCann), etc.

Estonian advertising firms do more than provide services to the domestic market – 20% of their sales revenues are earned from export. Export has been promoted by the fact that many Estonian advertising agencies belong to international chains.

Besides close relations to other creative fields (design, arts, music, audio-visual etc), one of the strengths of the advertising field is its high creative and technical level. The agencies are innovative and there is a great strive to develop (e.g. new methods, resources and styles are readily adopted). E-marketing is also more developed compared to many EU countries.

2. UMBRELLA ORGANIZATIONS

The largest advertising agencies are members of the non-profit **ESTONIAN ASSOCIATION OF ADVERTISING AGENCIES (ERAL)**. The Association was founded in 1998, with the objective of protecting the common interests of the members and guaranteeing their rights,

promoting close cooperation with clients and communications organizations, and also to promote the better understanding of the field of marketing communications, and improve education related to marketing communications. The ERAL obtains and distributes advertising-related information from Estonia and abroad and tries to influence the process of drafting and amending legislation based on the common interests of its members.

The ERAL's vision is a better environment through good ideas. The ERAL's membership includes 22 leading Estonian advertising agencies.

Estonian Association of Advertising Agencies

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info@eral.ee
www.eral.ee

3. SUCCESS STORIES

TANK – THE AGENCIES OF POSITIVE SURPRISES

Tank has created a new platform for Estonian branding which was started in 2001. This platform connects four fundamental influencers (cornerstones) and four fields of activity – tourism, the business environment, immigration and domestic tourism. Each cornerstone possesses a number of values and symbols. By combining this branding matrix many positive and surprising contrasts develop, which, in the context of a small country, are an excellent source of inspiration for communications in various fields of activity. Estonian branding is a comprehensive system that guarantees a uniform, distinctive and international image for Estonia, regardless of the field of activity.

Today, the Republic of Estonia uses the “Introduce Estonia” platform to advertise itself in the tourism and business worlds. In addition, hundreds of Estonian companies have joined the program, in order

to use elements of the Estonian brand to introduce themselves in foreign markets. The same principles are applied to the international branding of Estonian higher education, which was also created by Tank.

The Estonian brand was created in cooperation with various parties from around the world. The entire creative process was directed by Tank in close cooperation with Enterprise Estonia.

For more information, see <http://tutvustaeestit.eas.ee>

GOLDEN EGG

THE ESTONIAN ASSOCIATION OF ADVERTISING AGENCIES has organized the annual Golden Egg advertising competition since 1998, where the creators of advertising compete in various categories. The goal of the competition is to have the Estonian advertising industry identify and award prizes to the best ads and their creators for the previous year.

The broader objective of the advertising competition is to improve the creative level of Estonian advertising and to recognize the people working in this field. In addition, it provides the agencies with an opportunity to measure themselves against others and for the public to get an overview of the ads created in Estonia. Many works that have received Golden Eggs have been recognized at the international level.

A youth competition also takes place within the framework of the Golden Egg event. Under 29-year-olds who are studying or working can participate. This provides a venue for young people and creates new opportunities for the next generation to achieve international recognition.

4. ASSESSMENT OF A FOREIGN EXPERT

„Estonia’s ad industry is rapidly going digital. Despite its young age, the digital developments are mature and professional over here – especially in the context of the neighbouring area. Obviously everything in the world is getting even more integrated: countries, economies, brands, marketing, communities, and communications. Thanks to “Mr. Crisis”, these processes will be accelerated further. For Estonian digital professionals, it’s the right time to work on expanding their knowhow into foreign markets.

After all, it is E-stonia.”

Vaidas Matulaitis

Independent Brand strategist



ARCHITECTURE

1. OVERVIEW OF THE FIELD OF ACTIVITY

In Estonia, architecture is a creative industry with long traditions and substantial employment. During the building boom of 2004-2007, the demand for architects and designers exceeded the supply. This in turn meant that young architects had the opportunity to accomplish a large amount of work. Thus, a generation of young architects has grown up in Estonia that possesses phenomenal work experience.

About 900 companies operate in the field of architecture in Estonia with the sales revenues comprising 10% of the total income of Estonia's creative sector. During the past few years, a steady 10% of the services have been exported. At the same time, the architectural and design firms have demonstrated an increased interest in foreign markets.

Regionally, the architectural companies are concentrated in Tallinn and its environs (76%), and to a lesser extent in Tartu and Pärnu, although one can find architectural firms in almost each of the fifteen counties.

The strengths of Estonian architecture include trained specialists with contemporary skills and the high quality of Estonian architecture.

2. UMBRELLA ORGANIZATIONS

ESTONIAN CENTRE OF ARCHITECTURE

The Estonian Centre of Architecture (ECA) focuses on modern architecture and its future. The centre's mission is to promote and develop modern Estonian architecture and urban planning; increase architectural awareness; collect, exchange, intermediate and distribute architectural information at home and abroad. The objective is to integrate knowledge and competence in the architectural field with the society more generally, thereby contributing to develop-

ments and innovations in the sphere.

The ECA cooperates actively and productively with similar centres round the world, as well as with private companies and local governments, in order to synthesize information and the various endeavours to analyze and create public space.

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The Union of Estonian Architects

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The Museum of Estonian Architecture

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Estonian Society of Interior Architects

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3. SUCCESS STORIES

ROTERMANN QUARTER

Currently the clearest success story in Tallinn's public space and the field of urban planning is the realization of the Rotermann Quarter project. It provides a unique and worthwhile experience in the European context and is something more than just a traditional city centre shopping quarter in both an architectural and urban planning terms. A modern neighbourhood was established in a 150-year-old former industrial area between Tallinn Old Town and the port, which is a historically significant district of cultural and environmental value. The concentration of historically valuable buildings is comparable to Tallinn Old Town. The change in the district's milieu during the Soviet period is recorded forever in the world's cultural history, since much of Andrei Tarkovsky's *Stalker* was filmed in

the dilapidated industrial quarter. The dignified old industrial buildings, combined with a layer from a totally different world, caused a conflict that created an expressive framework for Tarkovsky's film with its philosophical power of generalization.

The key to the success of the Rotermann Quarter has been the long-term cooperation between specialists and developers for the integrated development of the district, by also focusing on the design of the public space between the buildings. The developer of the district, Rotermann Eesti OÜ, along with its cooperation partners – the architectural firms of Kosmos, KOKO, Alver Architects, Teigar Sova Architects, HG Architecture and Emil Urbel Architectural Office – have been able to create a new integrated urban area that is characterized by a multitude of lifestyles, environmental diversity, urban density and various public space designs.

The AB Kosmos architects were crowned with the Estonian National Culture Prize and a letter of thanks from the Mayor of Tallinn for designing daring contemporary buildings for the historical Rotermann Quarter. The developer, Rotermann City OÜ, and architect Vahur Sova received letters of thanks from the Tallinn City Government and Tallinn Cultural Heritage Department for the excellent restoration of the Rotermann Barley Mill. The integrated solution (LED street lighting, lighted plastic seating, trash cans, and plant containers) on Rotermanni Street earned triple recognition when the Bruno Awards were distributed – in the categories for product design, design project and design management.

4. ASSESSMENT OF A FOREIGN EXPERT

“Young Estonian architects have had a tremendous opportunity during the last few years, and this has been used to create truly notable works of architecture.”

Hans Ibelings

A10, New European Architecture



AUDIO-VISUAL FIELD

1. OVERVIEW OF THE FIELD OF ACTIVITY

In 2007, 225 companies with 1,050 employees operated in the Estonia's film and video sector and the sales revenues totalled 673 million EEK. Companies producing films and videos comprise more than 50% of the audio-visual field, and the others deal with TV production, post-production and distribution, as well as recording. Film and video companies comprise 4.5% of all creative industries, provide 3.75% of the employment, and generate 3.75% of the sales revenues. There are about 60 active film production companies. The export volume of the 20 largest companies is an estimated 20 million EEK.

The strengths of this field are the ability to cooperate with foreign partners and the high level of professionalism, as well as the readiness to adopt innovative technologies (digital production and post-production, 3D film production, experiments in developing 3D technologies).

Location and film services are the most important export articles. In 2009, film crews with large projects from Germany, Norway, Russia and Finland were working in Estonia. The digital post-production centre to be completed in 2011 should improve the provision of sound and post-production services.

2. UMBRELLA ORGANIZATIONS

THE ESTONIAN FILM FOUNDATION (EFF) operates as the umbrella organization for this field of activity. The EFF was founded by the Government of Estonia as a private legal institution in order to create conditions for the development of Estonia's national film industry, and to support the creation, production and distribution

of professional Estonian films. The EFF is the largest financier of film production in Estonia and intermediary for contacts in the film industry.

Estonian Film Foundation

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film@efsa.ee
www.efsa.ee

3. SUCCESS STORIES

The internationally renowned **BLACK NIGHTS FILM FESTIVAL** (PÖFF) is an international festival with a competitive program and four sub-festivals that has existed for 14 years and is visited annually by hundreds of foreign visitors. On 4 December 2010, the European Film Academy Awards will be presented in Tallinn in cooperation with PÖFF.

Contact: Director Tiina Lokk
www.poff.ee.

THE BALTIC EVENT (BE) film market that operates within the framework of PÖFF has become the most important event for film industry professionals in the region, attended by hundreds of film sales agents, producers, distributors and representative of film funds. The Cannes Producer's Network, Sarajevo Cinelink, EAVE are among the BE's cooperation partners. The BE includes a co-production market for Baltic and Scandinavia, East European and Russian projects, the presentation of projects that are in production, industry screenings of the newest Baltic films, as well as discussions and information panels.

Contact: Riina Sildos
<http://be.poff.ee>

Tallinn University's **BALTIC FILM AND MEDIA SCHOOL (BFM)** is the only institution of higher education in northern Europe teaching film, television and media studies in English. The BFM offers hands-on three-year BA and two-year MA programmes. BFM Works, the BFM's production and training unit, provides training and production services. The BFM is also becoming a centre of knowledge about creative industries.

Contact: Martin Aadamsoo

www.bfm.ee

Although the volume of film production in Estonia is limited, there are products that have become brands in Estonia and abroad. One is definitely Estonian animation: the so-called Priit Pärn school of short animated films, as well as the full-length animated film **LOTTE** and its characters created by Heiki Ernits and Janno Põldma. The film Lotte from Gadgetville has been sold to 55 countries. There are Lotte-branded toys, children's clothing, sweets, etc.

"New" Estonian feature films have also been successful, and one of the most famous representatives is **VEIKO ÕUNPUU** with his films Autumn Ball and The Temptation of St. Tony, which have received numerous awards.

For more information about filming in Estonia, see www.filmestonia.ee

4. ASSESSMENT OF A FOREIGN EXPERT

„Filming in Estonia was a great experience. Our local co-producer did a marvellous job; the locations were superb and the crew was skilled and friendly. We certainly hope to return.”

Juha Wuolijoki, director and producer, Finland

„To optimize our costs during hard times, we filmed in a pavilion in Tallinn. Estonia is very cost-effective, and we also greatly benefited from the Estonian work ethic.”

Fyodor Bondartshuk, producer, Russia



DESIGN

1. OVERVIEW OF THE FIELD OF ACTIVITY

Estonian design is internationally renowned and has long traditions. Design education has been provided for almost 100 years - the Tallinn Industrial Art School was founded in 1914 with the goal of training specialists to design products for the companies that had developed as a result of the Industrial Revolution. The strengths of contemporary Estonian design include a community of diverse specialists, a modern educational base with long traditions, a functioning international network and wide experience in production. Worldwide recognition is garnered by Estonia's excellent reputation in the fields of IT and e-services and the widespread skill of creating and using specialized software. Another asset is a thorough knowledge of materials and a high level of manual skills – this kind of in-depth knowledge of materials and technologies is disappearing in many countries, which gives Estonian designers a significant competitive advantage. Based on the statistical data, there are currently 711 companies that provide design services in Estonia and their number is constantly increasing.

2. UMBRELLA ORGANIZATIONS

The vision of the **ESTONIAN DESIGN CENTRE** is to promote the field of design in order to contribute to multifaceted knowledge-based and competitive creative industries. The mission of the Design Centre is to create an inspiring, innovative and cooperative environment for the development of design, which is also supported by Estonia's location at the crossroads of various cultures.

The Estonian Design Centre provides continuous professional development programmes, organizes networking events, think tanks, seminars, surveys, workshops and exhibitions, acts as a

design expert and consultant and is an initiator of the project called Design Excellence Estonia. The Estonian Design Centre participates actively in international cooperation and is a member of several international organisations and networks.

Estonian Design Centre

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www.disainikeskus.ee

The **ESTONIAN ASSOCIATION OF DESIGNERS (EAD)** is an association uniting and representing Estonian designers, with the goal of representing design in the broader context. Today 115 professionals in the fields of product, furniture, fashion, textile and graphic design belong to the organization that was founded in 1989.

EAD focuses on the activities that transcend national borders and complement national activities. The association is committed to stimulate design thinking through conferences, workshops, competitions, exhibitions, and websites that communicate the value of design to audiences outside the profession. The Estonian Design Prize BRUNO and annual Design Night festival (www.disainioo.ee) are the EAD's best known projects.

Estonian Association of Designers

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Estonian Museum of Applied Art and Design

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3. SUCCESS STORIES

DESIGN EXCELLENCE ESTONIA is a place where the skills, opportunities and contacts of Estonia's design world meet. It comprises

Estonia's best design firms, who are stronger together and offer more diverse and valuable services. Design Excellence Estonia is a good way for clients to find the best design service from one place.

Currently, Design Excellence Estonia unites 21 renowned Estonian design firms that provide services in all fields, while its strengths are in unique design based on handicraft as well as strategic, communication and industrial design. The majority of the members of Design Excellence Estonia have direct or indirect experience working in foreign markets. Goods and services designed by the companies belonging to the platform have reached very diverse markets – North America, Japan, Australia, China, Scandinavia, and other West and East European countries, as well as Russia and Ukraine.

The experience of working in such diverse markets is a proof of the potential of Estonian design to be globally competitive in almost all fields of design. The goal of Design Excellence Estonia is to become known as a starting point for the creation of value for goods and services. We have the potential to make Estonia legendary in the world for its good design. This claim is also supported by the ability of Design Excellence Estonia members to communicate with clients not only in English, Russian and Finnish, but also in Swedish, German, Hungarian, Spanish and Italian.

KEHA3

The Keha3 creators are product designers Margus Triibmann and Tarmo Luisk, along with entrepreneur Ville Jehe, whose idea is to create Estonia's first design company that can manage the entire manufacturing chain.

Keha3 is focused on product design and design management – they are product developers, owners and sellers. The company does everything from managing the design process to installing the products, from custom projects to the design of their own product portfolio. They are ready to mass-produce all their new products. The company produces for the Estonian and foreign markets. The Keha3 product range is characterized by small oddities in technologically refined and aesthetic forms, their portfolio includes interior design elements and examples of street furniture. Tarmo Luisk is one of Estonia's best known designers, who creates unique Estonian lighting design for the second decade. Both Tarmo Luisk and Margus Triibmann have awarded the Bruno Estonian Design Award in 2008. A bicycle rack created by Keha3 received the design award in the product design category at the 2009 Best Environmental Design competition in Estonia.

For more information see www.keha3.ee, or write to keha3@keha3.ee

4. ASSESSMENT OF A FOREIGN EXPERT

„I have the feeling that the only ones, who do not believe in Estonian design are the Estonians themselves“,
Timothy Jensen, designer, Denmark
Chairman of the jury for the 2008 Estonian Design Prize BRUNO.



FASHION

1. OVERVIEW OF THE FIELD OF ACTIVITY

Estonian fashion design as a business is a growing creative field. Some large clothing manufacturers operate in Estonia, but the rising trend is the creation of designer brands operating as small enterprises and the creation of designer sales outlets.

The flagship of the Estonian garment industry, with a local designer workforce, is the Baltika Group, with 17 designers and four different brands – Ivo Nikkolo, Monton, Mosaic and Baltman. Baltika's 2009 sales turnover was 807 million EEK, with 75% earned from exports. The next largest company is the PTA Group, with three designers. Two designers work at both Marat and Bastion, while Sangar, which has become famous as a manufacturer of dress shirts, has only one designer, but over half of their production is exported.

Company	Number of designers	Sales turnover (million EEK)	Export volume
Baltika / Baltika Group	17	807	75 %
PTA Group	3	151.2	54%
Linette	2	16.2	25%
Marat	2	n/a	50%
Bastion	2	32	30%
Sangar	1	55	62.5 %

During the last few years, a new trend has developed for designer brands operating as small enterprises. Here is a selection of their websites:

www.reetaus.com

www.tallinndolls.com

www.hannakorsar.com

www.tiinatalumees.ee

www.iidadesign.ee

www.bon.ee

www.lediana.ee

2. UMBRELLA ORGANIZATIONS

Two organizations with different objectives operate as umbrella organizations for fashion designers working in Estonia.

ESTONIAN ASSOCIATION OF FASHION DESIGN (EAFD) is dedicated to the business-related development of fashion designers and to offering their outputs both at home and abroad. The Association of Fashion Design annually organizes Tallinn Fashion Week and educational seminars for small businesses in the fashion design sector.

Estonian Association of Fashion Design

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ESTONIAN SOCIETY OF FASHION DESIGNERS focuses on educational workshops, conceptual fashion shows and the development of fashion exhibitions.

Estonian Society of Fashion Designers

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3. SUCCESS STORIES

Estonia's leading clothing company is **BALTIKA GROUP**, which operates Monton, Mosaic, Ivo Nikkolo and Baltman retail chains in six markets. The fashion brands are represented in a total of 130 shops in Estonia, Latvia, Lithuania, Russia, Ukraine and Poland. In addition, the Mosaic collection for women is sold in Peek & Cloppenburg department stores throughout Western and Eastern Europe. Currently, a total of 17 designers work at Baltika. Baltika's goal is to be the leading specialized fashion retailer in the Central and East European region.

www.montonfashion.com

www.baltman.ee

www.mosaic-fashion.com

www.ivonikkolo.ee

Estonian green designer, REET AUS, has been producing her own collection as a small entrepreneur for five years. Reet is the leading advocate of environmentally friendly fashion in Estonia and uses organic and recycled materials in her collections. She has gained recognition with her work at both the London and Paris Fashion Weeks. Reet is passionate about green thinking in all spheres of life, not only in the creation of fashion.

www.reetaus.com

A new and daring brand is TALLINN DOLLS. The brand has been in the market for only a few seasons, but its founders have bold ambitions and export plans.

www.tallinndolls.com

4. ASSESSMENT OF A FOREIGN EXPERT

Urmas Väljaots, fashion observer in Paris says:

“Estonian fashion is quite direct and comprehensible – a woman is a woman and a man is a man. Concept creation is not as popular in Estonia. Estonian fashion combines Nordic coolness, nature friendliness, a practical sense and minimalist lines with Slavic richness.”

Elena Strahova, President of the Baltic Fashion Federation says:

“The closer the Baltic country is to the Nordic countries, the more discrete the fashion picture. This is true of both the colours and the cuts. The stronger the individual designers, the more forceful the fashion breakthrough of the Baltic region is going to be in international markets.”



MUSIC

1. OVERVIEW OF THE FIELD OF ACTIVITY

Currently, the music business comprises an estimated 8% of the Estonia's creative industries, and as of 2007, the sector contributed about 11.7% to their total revenues. Approximately 80% of music companies operate in Tallinn.

In addition to creative people, the music industry includes the various branches of business related to music, for instance, the manufacture of musical instruments, the production and sale of recordings, concert promotion, agent-related activities, copyright fees, etc. Today, the largest exporter in the music field is the Estonian Piano Factory and the most successful composers are Veljo Tormis and Arvo Pärt. Compared to the rest of the world, the relative importance of pop, rock, ethno and jazz music is still marginal – both domestically and especially as an export item. At the same time, there is lots of potential and the developmental trend is for greater structure and cooperation, which holds the key to making use of unrealized resources.

Great strides are being made in the educational side of this field of activity. More and more music schools are expanding their curricula to include jazz and folk or roots music. In schools of higher education, cultural organization programs are becoming popular, which, in the long term, will form the basis for the professionals structure of this sphere and thereby promote its economic development.

2. UMBRELLA ORGANIZATIONS

ESTONIAN MUSIC DEVELOPMENT CENTRE

The membership comprises various organizations representing musical spheres and genres, as well as the representative organiza-

tions of music businesses. The goal is to prepare a development and marketing strategy, develop entrepreneurship, and set up a structure for export.

Estonian Music Development Centre

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The members of the organization are connected to various international websites:

www.tallinmusicweek.ee

www.estmusic.com

www.emic.ee

www.ema.edu.ee

ESTONIAN MUSIC COUNCIL

As the representative body for musicians, the goal of the Council is to strengthen the ties between musicians and musical institutions operating in Estonia, and as a member of the International Music Council (UNESCO), to develop international cooperation.

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www.emc.ee

3. SUCCESS STORIES

UNIVERSAL MUSIC BALTICS

As the first global music company with a Baltic office in Estonia, Universal Music Baltics under the direction of Leen Kadakas has brought a new level of professionalism and international business practices to the Estonian music and record market, by marketing the Universal Music Group catalogue and artists locally and crea-

ting better opportunities for local artists in the global music market. The artist and distribution contracts, which have been signed with Estonian artists such as Kerli, Metsatöll, Mihkel Poll, Röövel Ööbik and Malcolm Lincoln, guarantee greater distribution for their music in the form of both physical and digital sales (iTunes, Spotify, etc.). In addition, Universal is the first international music company to make its entire catalogue available to the Baltic market in digital form.

www.universalmusicbaltics.com

TALLINN MUSIC WEEK

Tallinn Music Week took place for the first time in 2009 and is a music showcase festival, where Estonian artists with the strongest export potential can perform – representing all musical genres from pop and rock, to jazz, folk and contemporary classics. A seminar and conference on the music business is held simultaneously with the comprehensive music festival during the third weekend of March, with almost 400 professionals from the music business in Estonia and around the world attending. Almost 100 international delegates and 30 members of the foreign press attended TMW in 2009 and 2010, in order to participate in the music industry conference and the showcase presenting Estonian artists. As a result of the first two Tallinn Music Week festivals, Estonian artists have been invited to perform at important showcase festivals, including EuroSonic in the Netherlands, Spot Festival in Denmark, and Popkomm in Germany; at large festivals like the London Jazz Festival in England and FelSziget in Romania; as well as festivals in Finland, Latvia and Lithuania. Some Estonian artists have gone on extensive European tours and international recording contracts await others. The founder and director of Tallinn Music Week is Helen Sildna: helen@tallinmusicweek.ee
www.tallinmusicweek.ee

4. ASSESSMENT OF A FOREIGN EXPERT

„It has been a pleasure visiting Estonia and experiencing the vibrant music scene. The country is beautiful and the people are dedicated and talented. Every time I am in Tallinn I can feel the enthusiasm and ambitions of the talented musicians and the music entrepreneurs and I am convinced with them that the music sector has a lot to offer in terms of getting an international recognition for Estonia. Music travels easily and people bond with genuine talent and Estonia has plenty of it.”

Anna Hildur Hildibrandsdottir

Iceland Music Export/You Are in Control creative industries conference

„Few countries prove the saying, ‘good things come in small packages’ more than Estonia does when it comes to the quality and potential of their music and musicians. Estonia is a country that amazes me for the quality of its composers and musicians and the devotion that its people have for making their music known on the international scene. For those lucky enough to make the discovery, they certainly won’t be disappointed.”

Kevin Kleinmann

USA/France, music industry personality



NEW MEDIA

1. OVERVIEW OF THE FIELD OF ACTIVITY

The production, publishing and marketing of entertainment software is a growing trend in the information technology sectors and entertainment industries. Currently, there are about a dozen firms operating in the new media sector in Estonia – some are successful programming subcontractors for foreign companies, others develop web environments, and still others import, “estonianize” and sell games. Based on statistics, an estimated 325 people were employed in this field of activity in 2007, and the turnover was approximately 305 million EEK. The sector’s main employer and Estonia’s largest exporter of entertainment software is Playtech Estonia OÜ, which exports 100% of its production (150 million EEK in 2007) and employs approx. 90% of those working in the Estonian entertainment IT sector. The production of games requires so much capital and human resources that it is not worth producing them only for the tiny Estonian market. Therefore, the companies are interested in active cooperation with foreign partners. Estonia’s niche in the global entertainment software sector is primarily the production of on-line casino games. The success of the local companies Playtech and Videobet development centres demonstrate that globally competitive competence for the development of entertainment software does exist in Estonia. In terms of technological development, Estonia is at a higher level than many of the neighbouring countries.

2. UMBRELLA ORGANIZATIONS

Umbrella organizations for companies specializing in the production and distribution of entertainment software have not been founded yet in Estonia, however many of the larger companies are members of the **ASSOCIATION OF INFORMATION TECHNOLOGY AND**

TELECOMMUNICATIONS (ITL), since this field of activity is closely related to the telecommunications sector and information technology. The main objective of ITL is to unite Estonia’s information technology and telecommunication firms, and develop cooperation in Estonia’s movement toward an information society, including the promotion of the export of Estonian ICT products and services and cooperation with large international companies.

Association of Information Technology and Telecommunications

Lõõtsa 6, 11415 Tallinn

Tel: +372 617 7145, fax: +372 617 7146

info@itl.ee

www.itl.ee

3. SUCCESS STORIES

RATE SOLUTIONS is a leading Internet social networking company, providing various virtual environments for communities in Europe. The innovative and technologically solid platform is constantly being developed by an enthusiastic young team, which works hand-in-hand with our communities. Their aim is to build an exciting place in the Internet, where content is generated and managed by the users. A community-driven development strategy allows us to offer social functions to the users and new services to our partners, insuring the company’s profitable growth.

Founded in Estonia in 2002, Rate Solutions has expanded its operations to 25 countries and continues its aggressive expansion, with the goal of being the leading virtual social network in Europe.

Rate Solutions OÜ

Pärnu mnt 69, 10134 Tallinn

Tel: +372 699 8688

info@ratesolutions.eu

www.ratesolutions.eu

VIDEOBET is an international and ambitious software company that is part of the Playtech Group, which specializes in the development of game terminals and the corresponding administration applications. The undertakings of a small group of workers have become a rapidly developing organization with over 60 employees.

Playtech is one of the world's leading producers of Internet gaming software, which considers it vitally important to supplement its production and development teams with young and bright people. Estonia was not chosen as the location for a development centre by chance – the company has been building its team comprised of talented and ambitious Estonian IT virtuosos for seven years already. All the software products bearing the Playtech and Videobet brands are produced entirely in Estonia. The Playtech Group is a publicly traded company, and its stocks have been listed on the Alternative Investment Market (AIM) of the London Stock Exchange since March 2006. The company's workforce comprises approximately 500 people around the world, of which over 350 earn their daily bread in Estonian offices. The Playtech portfolio includes dozens of the most successful game operators and hundreds of the most popular online games, which are known primarily for their visuals and smooth integration regardless of the game platform.

VideoB OÜ

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www.videobet.ee

Playtech Estonia OÜ

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www.playtech.ee

4. ASSESSMENT OF A FOREIGN EXPERT

„The gaming industry is an area where even relatively small players with limited resources can make a significant impact internationally. This is a great opportunity for Estonia. The Estonian technology world has the ability to make big things with small resources and small teams. We can't build huge offshore software development factories, but we can create new solutions from bits and pieces, and do it in ways that end-users find useful.”

Jüri Kaljundi, Technology & Internet entrepreneur



PUBLISHING

1. OVERVIEW OF THE FIELD OF ACTIVITY

Companies that operate in publishing and printing business, as well as in associated fields, comprise 30% of the total volume of Estonia's creative industries. In 2007, the number of companies in the Estonian publishing and printing field totalled 578, and they employed 6,010 people. In 2007, the sales revenues for the publishing and printing field totalled 5.4 billion EEK.

In 2009, 4,551 new books and brochures were published in Estonia, and the number of copies totalled 6,856,000, which is 5.1 books per capita.

The largest publishers in Estonia are BIT (Avita Publishers BIT), Varrak, Koolibri and TEA Publishers.

The largest book printers in Estonia are Tallinn Book Printers and Greif. Sizable investments in their technical parks have enabled the largest printing houses to compete and break through into foreign markets.

2. UMBRELLA ORGANIZATIONS

THE ESTONIAN PUBLISHERS' ASSOCIATION was founded in 1991, and as of 1 May 2010, its membership included 33 publishers and organizations. The organization's objectives are to develop publishing activities in Estonia and thereby promote Estonian culture; to represent and protect the rights of publishers in relations with the government, as well as with the paper and printing industries, copyright protection bodies, book dealers and libraries. It is a nonprofit organization, which represents the general and joint professional interests and rights of its members. In order to promote Estonian literature, the Estonian Publishers' Association cooperates with the Estonian Literature Centre, and also facilitates opportunities for cooperation for publishers at international fairs.

Estonian Publishers' Association

Roosikrantsi 6, 10119 Tallinn

Tel: +372 644 9866, fax: +372 617 7550

kirjastusteliit@eki.ee

www.estbook.com



3. SUCCESS STORIES

BALTIC BOOK FAIR

The Baltic Book Fair, which is organized by the Estonian Publishers' Association, has taken place since 1995. The fair got its start in Tallinn, but today it rotates annually among the three Baltic countries. The Book Fair is not just a place to buy books, but it is also important for promoting and introducing publishing as a branch of Estonia's creative industries to a wider audience. A range of interesting, useful and educational information is offered to as wide a target audience as possible. The fair is a place where publishers, authors, representatives of the printing industry and readers can meet. Representatives of foreign companies are also welcome in order to create and develop contacts.

The Baltic Book Fair will be held in Tallinn again in 2013. For more information, see www.estbook.com

SUCCESS BASED ON ADAPTABILITY

TALLINN BOOK PRINTERS was founded in 1985 and it is the oldest book printer in Estonia. The first foreign orders were completed for Finland in 1991. During subsequent years, books were printed and bound for Sweden, Denmark, Norway, the Netherlands, Great Britain, France, Belgium and Canada.

In the first half of 2010, export comprised 45% of the production and the geography of the orders had expanded even further. Investments totalling almost 100 million EEK have been made during

the last decade. Export has guaranteed stability for the company in difficult times, allowed it to preserve jobs and remain competitive. The loyalty of many regular customers is based on the printer's flexibility, diverse services, openness, consistent work quality, and ability to move with the technological times.

SUCCESS WITH LANGUAGE TEXTBOOKS

The productive cooperation between TEA Publishers and the authors of language and grammar textbooks, as well as dictionaries, has created wonderful opportunities to sell publishing rights to countries around the world. Thus, during recent years, publishing rights have been sold to more than 25 countries, including Latvia, Lithuania, Poland, Finland, Russia, China, India, Sri Lanka, Egypt and others. Most are English-language study materials published by foreign publishers, such as *Grammar is Easy*, *Let's Keep Talking*, *English for Secretaries*, *H&T for Business People*, etc. as well as German textbooks like *Hallo, Freunde!*, and *Deutsch für uns*.

4. ASSESSMENT OF A FOREIGN EXPERT

Assessment of the work of Tallinn Book Printers:

„We have been cooperating since 2009. The cooperation has progressed very smoothly because the printer's employees are true specialists in their field. Even the fact that our daily communications take place in three languages does not create an obstacle to achieving high-quality results – beautiful books.

The books printed by the Tallinn Book Printers have gained high recognition in Sweden and Norway. We are increasingly getting inquiries from publishers who have seen these books at presentations and exhibitions and been interested in who did the printing. We are certain that our cooperation will continue in increasing volumes.”

Trygve Carlsson

Carlsson Bokförlag AB



CREATIVE INDUSTRIES/REGIONAL CONTACTS

TALLINN CREATIVE INCUBATOR

Veerenni 24C, 10135 Tallinn
Tel: +372 604 0621, fax: +372 604 0609
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www.esa.ee

The Creative Incubator located in the Baltika Quarter is a studio-type entrepreneurial environment for companies in creative industries, who are capable of creating wellbeing and jobs through the creation and use of intellectual property.

KULTUURIKATEL / CULTURE CAULDRON

Põhja pst. 27a, 10415 Tallinn
Contact: Peeter Jalakas, Tel: +372 501 1956, peeter.jalakas@gmail.com
www.kultuurikatel.eu

Kultuurikatel - the historical Power Plant - is a place for artistic creation and production - a cultural breeding ground. It's located close to the medieval city centre in the harbour area, adjacent to the new developments along the coast. About 5 to 7 million people pass through the port area every year.

At this point in time, it includes electronic music, new circus and performing arts, architecture, design, art and new media organizations. The development aims to stimulate partnerships, knowledge transfer, good contacts and a broad European network, to create synergy between various cultural trends and organizations as well as creative industries and businesses.

TELLISKIVI LOOMELINNAK / TELLISKIVI CREATIVE CITY

Telliskivi 60A, 10412 Tallinn
Tel: +372 504 2945, +372 5455 5500
info@telliskivi.eu
www.telliskivi.eu

Telliskivi is a new area for creative activity on the edge of Old Town that, through a constantly evolving concept, creates an environment for enterprise, educational and cultural institutions, as well as art and entertainment events. Telliskivi's guiding principle is cooperation among its tenants and the creation of an open, multifunctional creative centre.

LOOVA

Rotermanni 5/Roseni 10, 10111 Tallinn
Contact: Kaire Jakobson, Tel: +372 677 5262
tuneyourinput@netscape.net
Kaija Kesa, printmaker: kaija.kesa@gmail.com
Stina Valgma, ceramics artist: stina.valgma@gmail.com

Loovala is an area that provides communications between 17 studio-shops and their visitors. An entire floor has been turned into a wall-less space where Estonian artworks are commissioned, created and sold.

The workshops are an essential part of Loovala — where everything including birthday parties, team-building meetings, seminars or charity events can be held. Come and awaken your creativity!

Tallinn Enterprise Board



TALLINN CITY GOVERNMENT

2011
TALLINN
EUROPEAN CAPITAL OF CULTURE

TALLINN CITY ENTERPRISE BOARD

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