

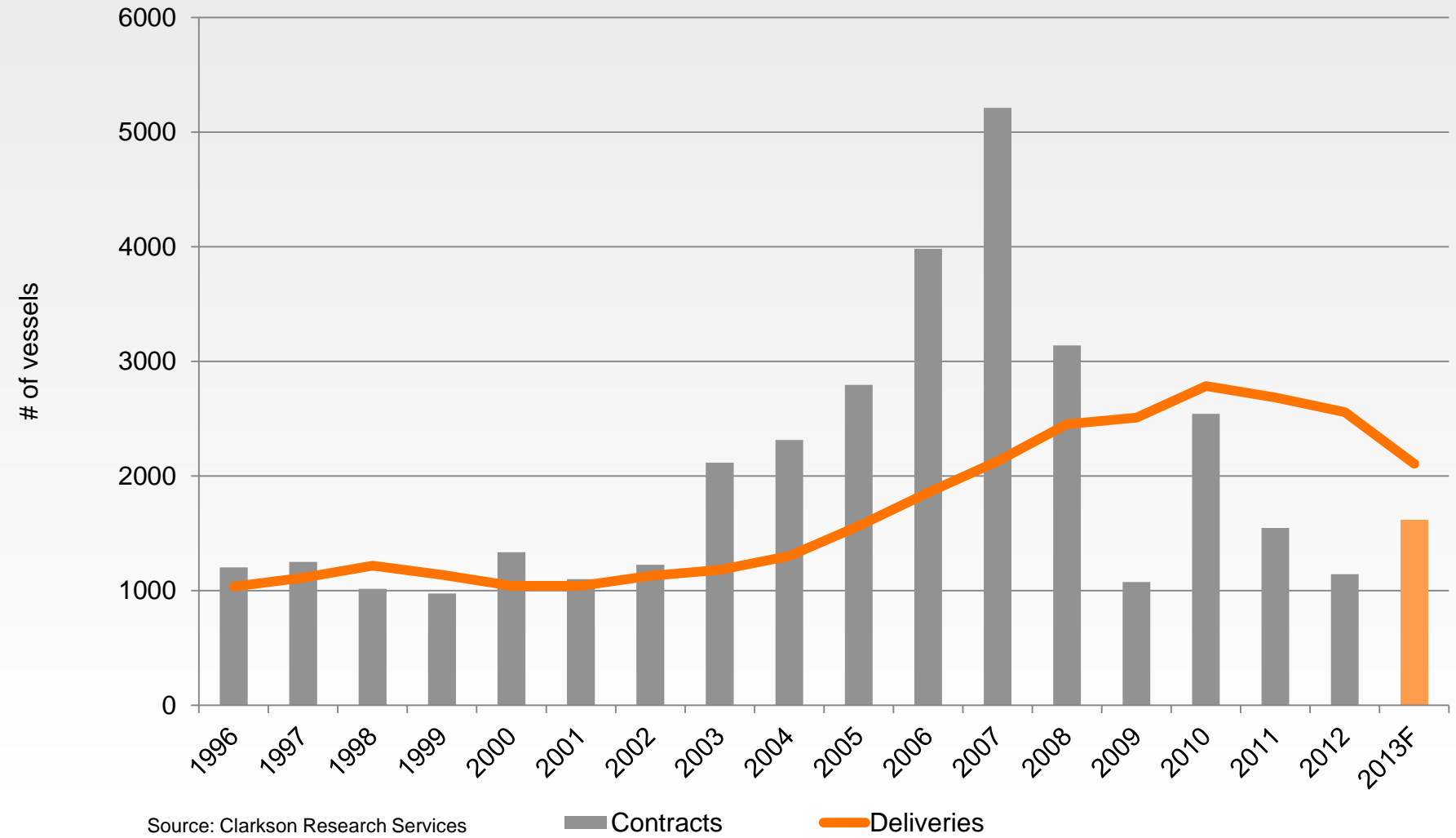
Baltic sea marine industries in global competition

See beyond the sea

26 – 27.11.2013

Ole Johansson

Newbuildig activity

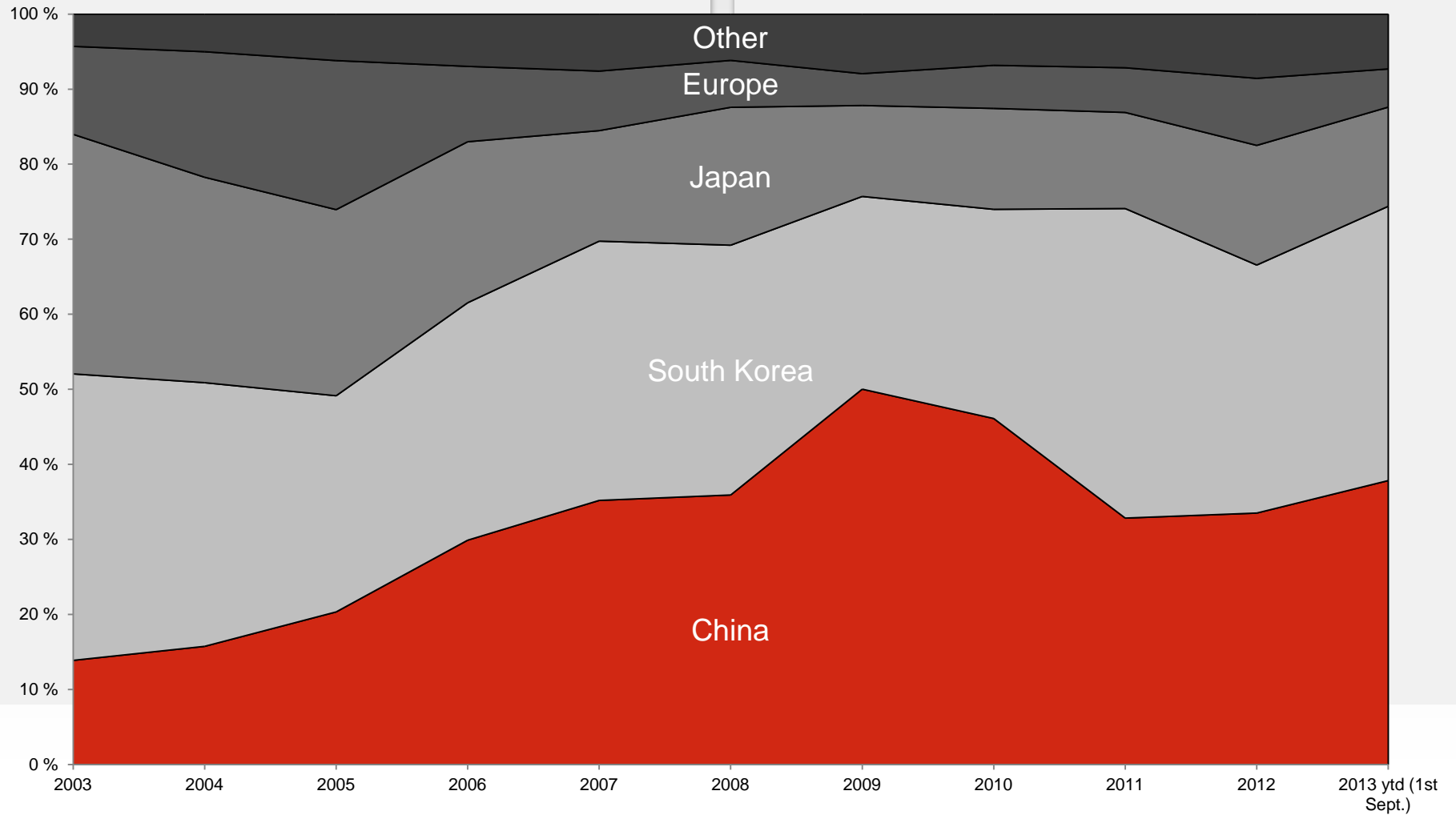


Source: Clarkson Research Services

■ Contracts

— Deliveries

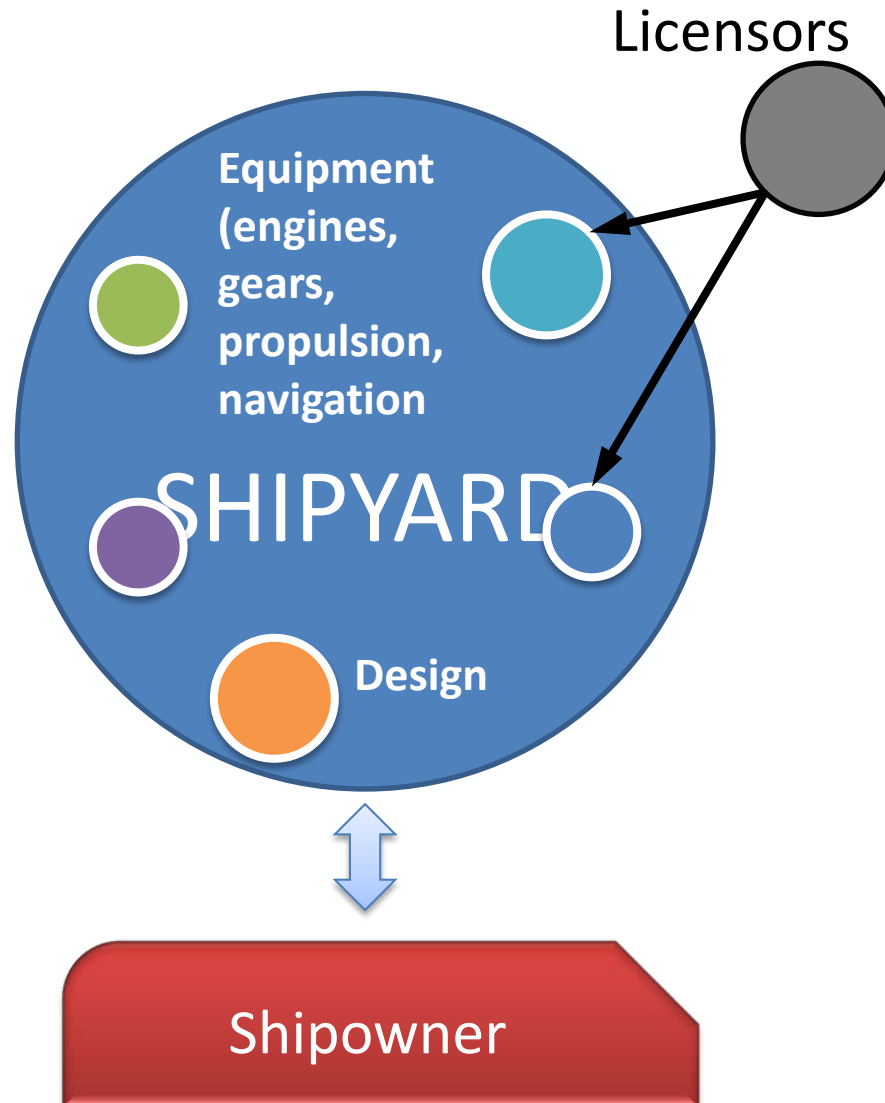
Contracting by region (CGT)



Source: Clarkson Research Services

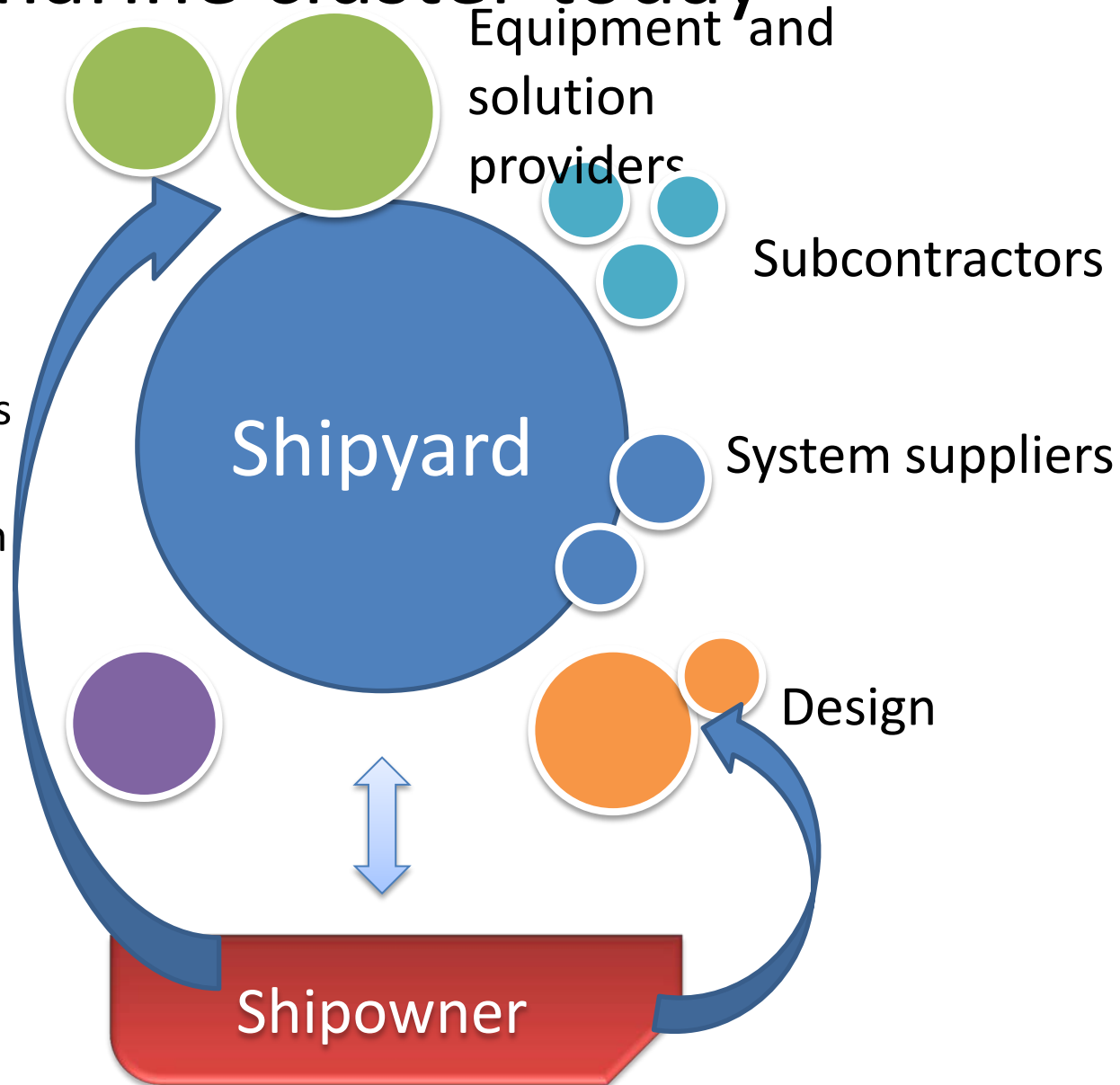
Finnish shipbuilding in the 1970 – 1980's

- Shipbuilder in focus
- Equipment suppliers part of yard with limited 3rd party customer base
- Non-proprietary technology purchased (licence)
- Yard – owner customer relationship

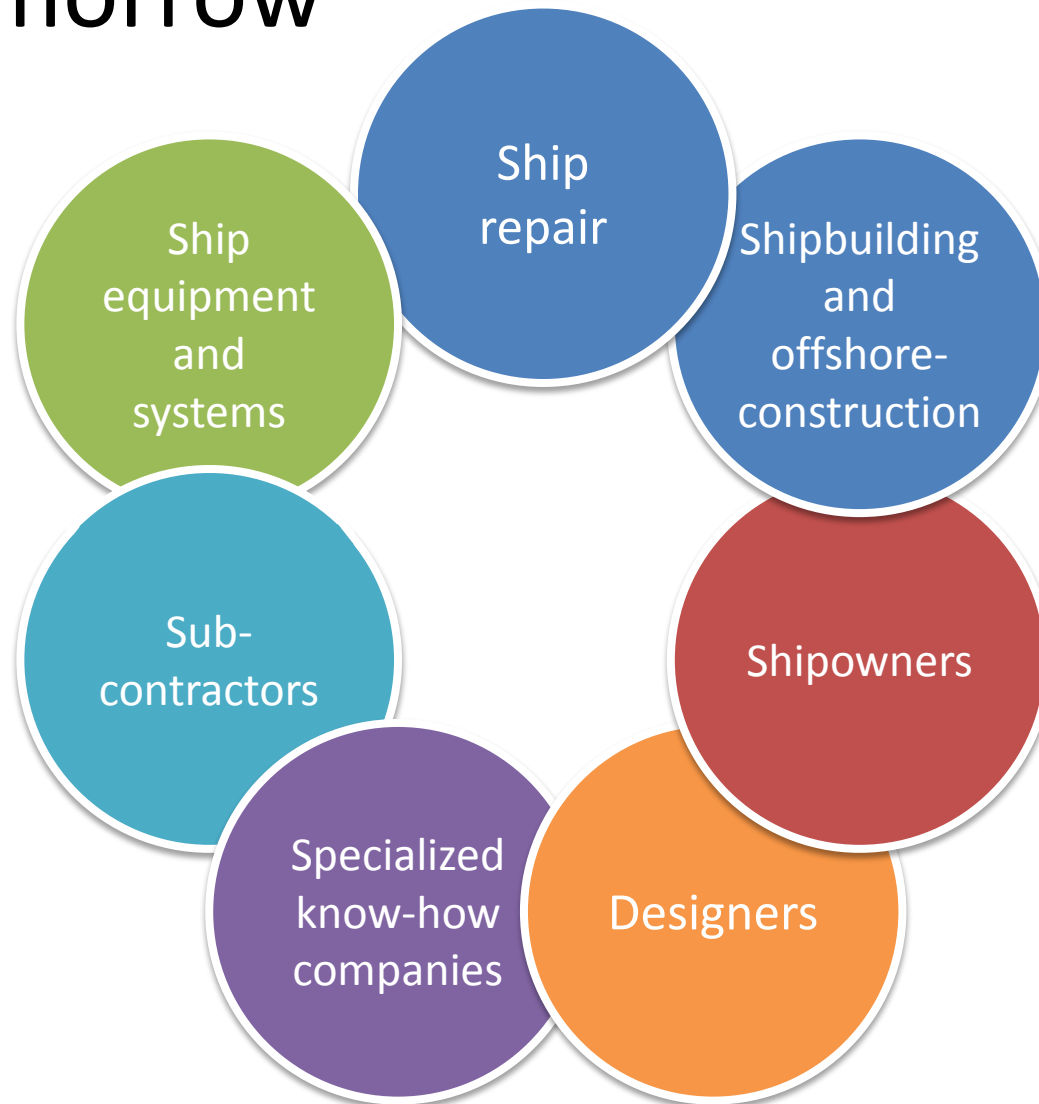


The Finnish marine cluster today

- Yard has strong responsibility for complete delivery
- Independent designers have big role
- Equipment and system suppliers are global companies with own service networks
- Subcontractors serve multiple customers
- Suppliers of complete systems have unique concept



The Finnish (Baltic) marine cluster tomorrow



Strong anchor companies

Broad product range

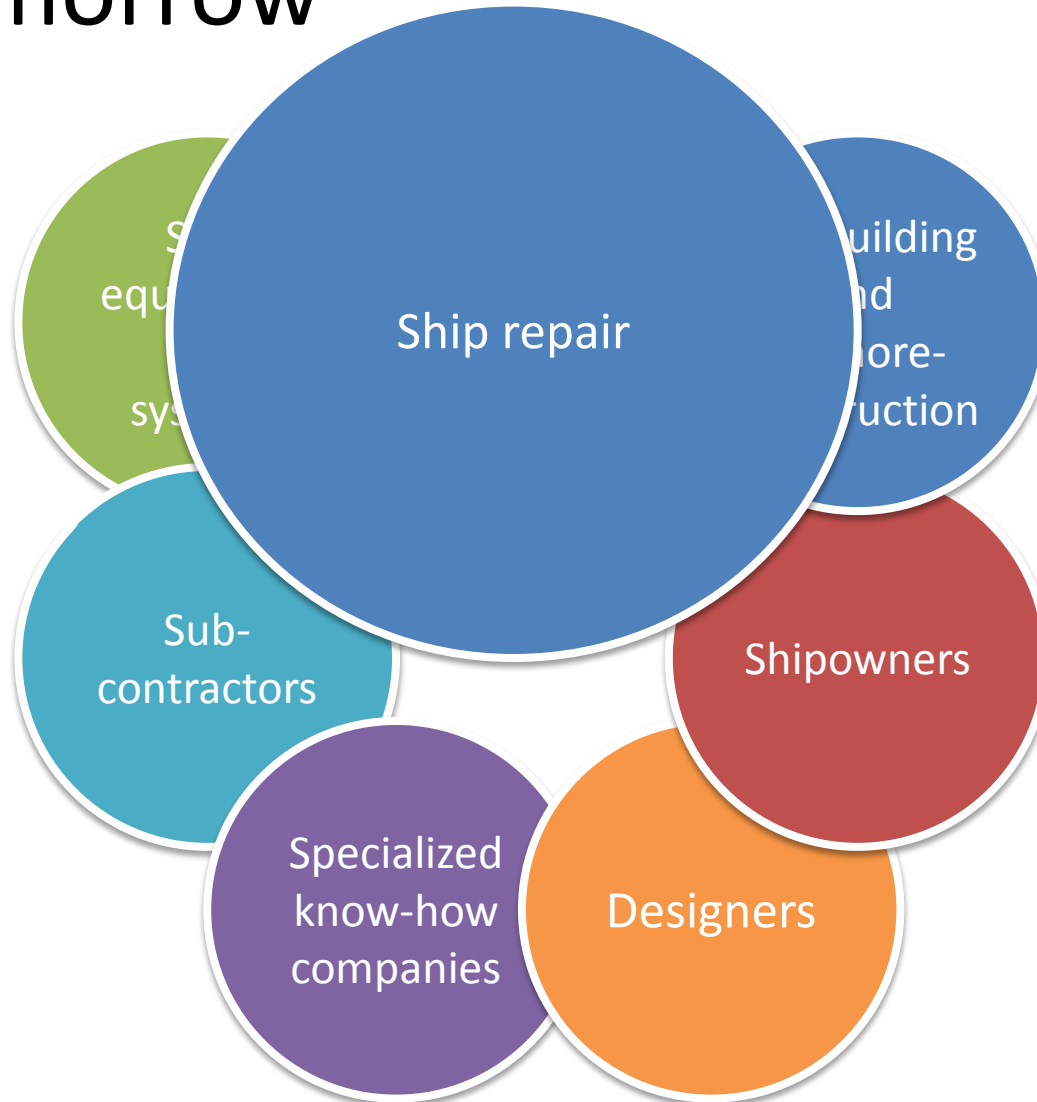
Internationalized SME's

Solution providers

Sustainability leaders

International networks

The Finnish (Baltic) marine cluster tomorrow



Strong anchor companies

Broad product range

Internationalized SME's

Solution providers

Sustainability leaders

International networks

SHIP REPAIR & CONVERSION SUPPLY 2012*

Yards serving local customers

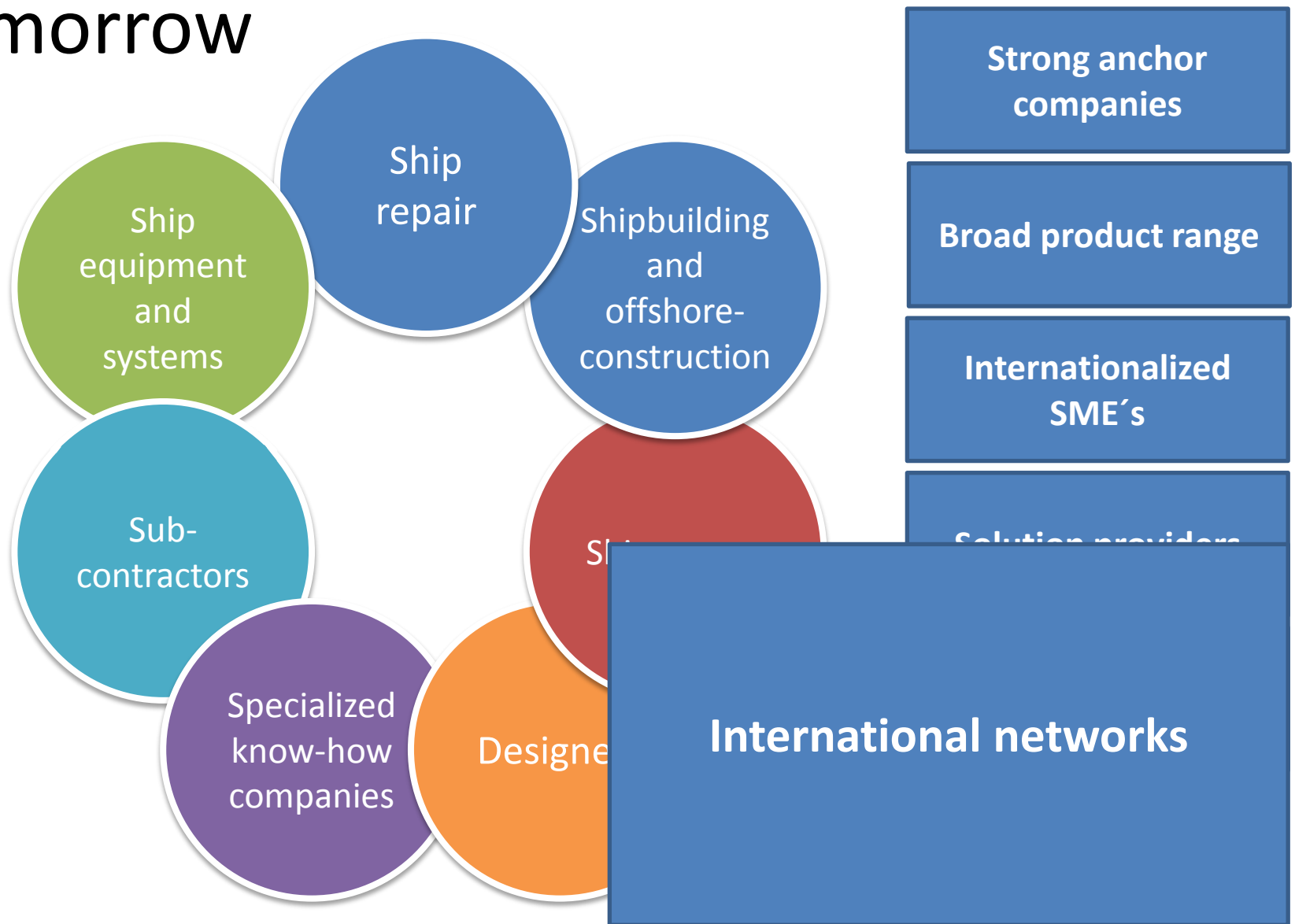
Finland**	40 M€
Lithuania	30 M€
Latvia	20 M€
Estonia	20 M€
Sweden	25 M€
Poland	100 M€
Germany	50 M€
Denmark	65 M€
Russia	50 M€
TOTAL	400 M€



*CESA and in-house estimate. Excluding port and voyage repairs by OEM's and non-facility service companies.

** TRY 20 M€, STX 12 M€, WSY/Teijo 7 M€

The Finnish (Baltic) marine cluster tomorrow



Baltic region strengths

-
- Centuries of experience
 - Global technology leaders with well recognized brands
 - Sizeable "home market"
 - Technology leaders
 - Good infrastructure
 - Broad know-how base
 - Global access
- Ship
- Shipbuilding construction
- Shipowners
- Designers
- Specialized know-how companies
- Ship and systems
- contractors