



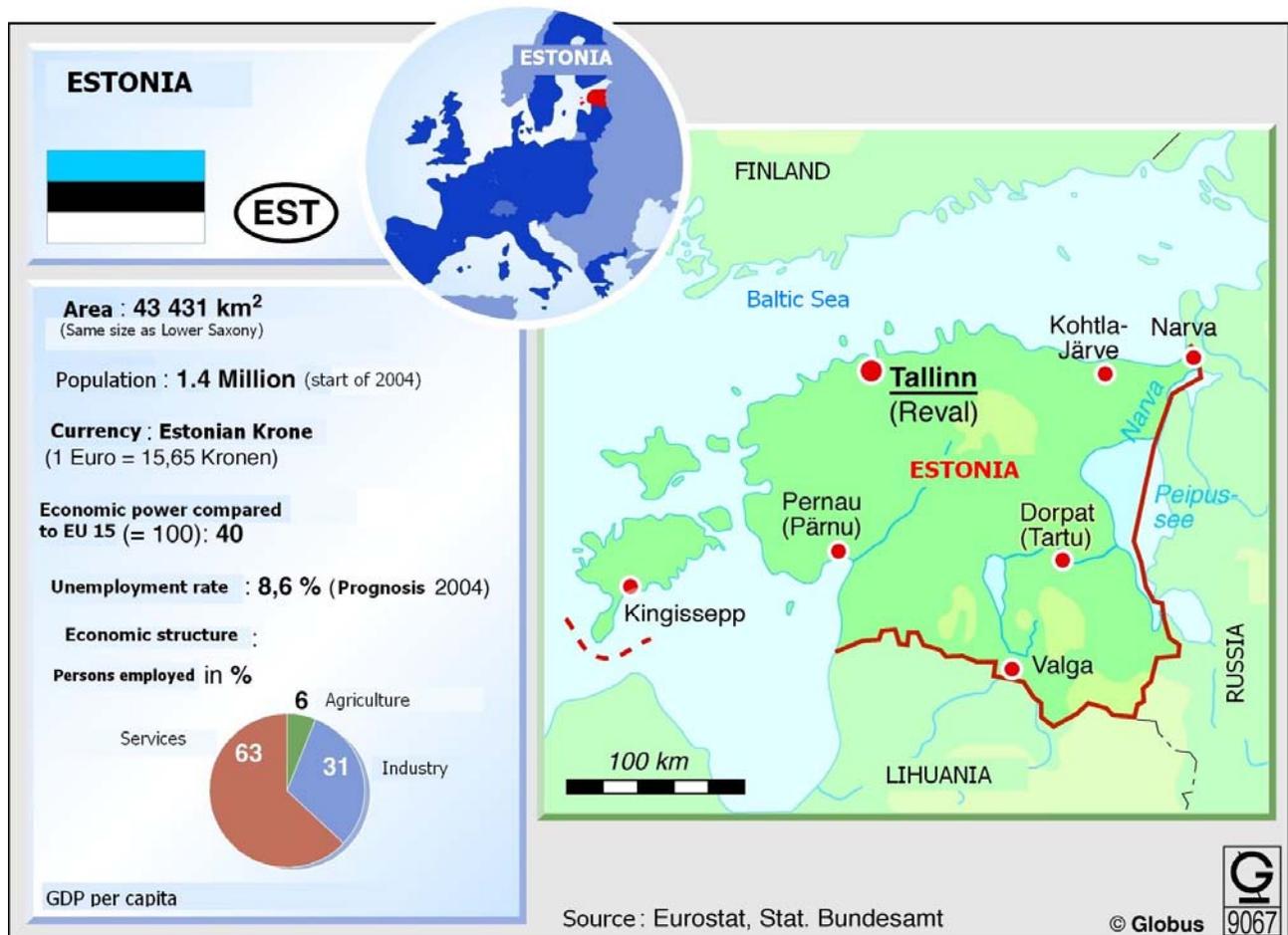
Hanseatic Parliament



HAUS RISSEN HAMBURG
Internationales Institut für Politik und Wirtschaft

An overview of Estonia

Information on and analyses of politics, the economy and education in Estonia including basic vocabulary and negotiating tips



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Imprint

Published by:

HAUS RISSEN HAMBURG – International Institute for Politics and Economics,
Hanseatic Parliament

Funding:

This project is funded by the European Union as part of the Prince Programme.

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Set by: Michael Gwosdz

Production: editiononline.de, Hamburg.

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Analysis and prognosis of the situation in Estonia

As a state with the population of Greater Hamburg, it is not easy for Estonia to be accorded full consideration on the world stage, meaning it needs to act all the more astutely in political terms to ensure it is not submerged between the major European states. Finland, with which the Estonians have close linguistic ties, is the country's only natural partner and is not of much help on its own. This makes it all the more astonishing that Estonian governments succeed in grabbing the international headlines and attracting the attention of investors. The enshrinement in law of the right to Internet access free of charge and the attendant objective of turning 90 % of all Estonians into Internet users by 2007 has lent the state a modern image, the country having established itself as a liberal paradise in 1994 when it was the first in Europe to introduce a flat-rate taxation system. The complete abolition of agricultural subsidies is just one of the many characteristics which regularly see Estonia at the top of the list of states providing businesses with the greatest possible freedom.

The aim was for this development to be capped by accession to the EU in May 2004. There were, however, good underlying reasons why the country's largest party, the Centre Party, broke ranks on the consensus of support for Estonia's membership of the EU. EU membership brought the return of agricultural subsidies, and Estonia lost many of the possibilities it possessed to establish flexible and sometimes idiosyncratic general economic conditions. As a small country, Estonia is now a small fish in the sea of 25 alongside such members as Malta, Luxembourg and Cyprus.

At the same time, EU accession has also brought the more shadowy elements of Estonia's success story to the forefront. The radical cuts in the social network are leading to the impoverishment of pensioners and the unemployed. The Russian minority, which makes up a third of the population, is being particularly affected by this development. Many Russians remain completely stateless and are isolated from political and economic everyday life. A small state cannot afford to disregard one third of its population. Today, there is already a shortage of labour, many employers also complaining of deficiencies in training. With average earnings at about €300 euro a month, well qualified skilled workers are being tempted to move to other countries in Europe, particularly to Finland, of course. Around 10 % of the population has emigrated since 1991. The gaps they have left are currently being filled by workers from Russia, Belarus and the Ukraine. It would, however, make sense for the country to provide qualifications for its own ethnic minority and open the labour market up to them.

The treatment accorded to the Russian minority is hampering relations with Russia. In the summer of 2005, the Russian President even withdrew his signature from the border treaty which had already been concluded because Estonia had insisted on including the phrases "decades of occupation" and "aggressive acts against Estonia by the Soviet Union" in the preamble. At the start of 2006, TV programmes from Russia were removed from the cable network, leaving the Russian minority with only minority interest programmes broadcast by Estonian state television.

In a further exacerbation of this conflict, members of the Estonian Parliament are threatening an extension of territorial waters in the Gulf of Finland in order to prevent Estonian territory being bypassed by the construction of the Baltic Sea Pipeline from Vyborg to Greifswald. If Estonia claims the 12-mile zone it is entitled to and if Finland follows suit, the pipeline will no longer run through international waters. Since the seabed off the coast of Estonia is ideally suited for a pipeline route, this would enable the country to obtain rights of co-determination for the project and to charge transit fees. In light of the fact that Estonia is 100 % dependent on Russian gas, the prospects of success in adopting such an approach are dubious.

Instead of this, a balancing of relations with Estonia's major eastern neighbour, successful integration of the Russian minority and a good level of training remain the most important political and economic goals of the next few years. Otherwise, the rapid process of economic convergence to the European average will falter at some stage due to the lack of workers. 900,000 Estonians will not be able to sustain the boom without support.

Geographical data



Area: 45,227 km²

Population: 1.35 million (2004), 1.44 million (1999);

Population density: 30 inhabitants/km²

Capital: Tallinn (377,000 inhabitants)

Number of ports – 6 with movement of goods of 45 million Tkm (2004)

Length of coast: 3,794 km

Navigable waters: 500 km

Street network: 55,944 km, motorways – 99 km.

Railway network: 958 km.

Intern. airports: 5; freight quota of 4.8 thousand tonnes (2004) and passenger quota of 278 thousand people (2001)

Proportion of land in agricultural use compared to whole surface area: 16 %

Source: CIA World Fact Book

Basic historical information

After centuries of foreign rule (the Danes from the 13th to the mid-14th century, the Germans from the mid-14th century to the end of the 16th century, Sweden from the end of the 16th century to the start of the 18th century and Russia from 1721 to 1917), the first independent state, the Estonian Republic, finally came into being in 1918. Real independence was won in the course of the Liberation War (1918-1920), which concluded with a peace agreement with Soviet Russia. The new state was characterised by instability and the fragmentation of the party system. In 1934, there was a coup virtually abolishing the Republic and replacing it with an authoritarian regime.

Independence was of brief duration, the country becoming part of the Soviet Union in 1940 as a result of the Hitler-Stalin Pact. During the Second World War, Estonia lost a quarter of its population, being returned to Soviet power after four years of German occupation.

The country did not regain independence until the collapse of the Soviet Union in 1991 when more than 77 % of the population supported the re-establishment of Estonian independence. The new state was recognised both by the western powers and the Soviet Union. Estonia is west leaning, as evidenced by the internal reforms which have taken place and its accession to NATO and the EU.

Source: German Federal Agency for Civic Education

HISTORY

During the 9th century AD, the country, which had been settled by Estonian peoples of Finno-Hungarian descent, fell under the rule of the Varangians and was forced to defend its independence against Sweden, the Danes and the Russian principality of Novgorod.

11th cent. Beginning of christianisation by the archbishops of Bremen and Lund.

1215 Livonian Brothers of the Sword

1346 Teutonic Knights

Start 16th cent. Reformation

1537 Saaremaa Island Danish

1558 Russian occupation

1561 North Swedish, South Polish

1582 Hiiumaa Island Swedish

1584 Swedish Duchy of Estonia

1629 South Swedish

1632 Foundation of the German-speaking university of Dorpat (Tartu)

1645 Saaremaa Island Swedish

1721 Whole of Estonia Russian

1885 Russian official language

1918 Independent Republic

1939 Hitler-Stalin Pact, emigration of the Baltic Germans

1940 Invasion by the Soviet Army, Soviet Socialist Republic of Estonia, deportations, settlement of Russians.

1989 Estonian official language

1991 Independent Republic

1994 Withdrawal of last remaining Russian troops.

1995 Application to join EU

Basic political data

When independence was achieved, a sign of continuity was displayed by drawing up a new constitution along the lines of the constitution of the First Independent Republic of Estonia in the period between the two world wars. The constitution was approved in a referendum held in 1992 and has been in force since that date. According to the constitution, Estonia is a **Parliamentary Republic**.

State President

The head of state is the **State President** (since 2001 Arnold Rüütel), who primarily fulfils representative duties, although he has more powers than the German President. He can, for example, intervene in the legislative process by exercising his right of veto. The office has been depoliticised, the aim being for the President to represent all Estonians rather than party political interests. For this reason, political party membership must be suspended during the time in which the office is held. The president is elected for a period of five years by a parliamentary electoral college.

Parliament

The **Parliament** – the Riigikogu – comprises 101 members and is elected every four years. Since the parliamentary elections of 2003, it has been made up as follows: the strongest groups are the Centre Party and the Res Puplica Party, both with 28 seats. Further parties are the Reform Party with 19 seats, the People's Union with 13, Pro Partia with 7 and the Moderates with 6. Parliament has a legislative function and elects the Prime Minister, who is a member of the largest parliamentary group and is responsible to Parliament.

Government

The **government** consists of the Prime Minister and the ministers. Estonia is currently being ruled by a coalition of the Reform Party, Centre Party and People's Union. Andrus Ansip has been Prime Minister since 2005. After election, the Prime Minister forms his cabinet via Parliament. The Parliament may pass a motion of no confidence in both the Prime Minister and individual ministers. In the latter case, only the minister affected needs to be replaced. In the former case, the whole government must resign.

Administration

Estonia is divided into 46 cities and 204 districts, which comprise 15 counties. The city and district parliaments are elected by local people (irrespective of nationality). County Governors are appointed by the government. At local government level, the government appoints administrators in a total of 15 country districts.



Country	Seat of administration
Harju	Tallinn
Hiiu	Kärdla
Ida-Viru	Jõhvi
Jõgeva	Jõgeva
Järva	Paide
Lääne	Haapsalu
Lääne-Viru	Rakvere
Põlva	Põlva
Pärnu	Pärnu
Rapla	Rapla
Saare	Kuressaare
Tartu	Tartu
Valga	Valga
Viljandi	Viljandi
Võru	Võru

Map: Wikipedia, German language sources: Lagerspetz/Maier: "Das politische System Estlands" (*"The political system in Estonia"*) in: Ismayer (Ed.) (2003): "Die politischen Systeme Osteuropas" (*"The political systems of Eastern Europe"*) / Stiftung Wissenschaft und Politik.

Basic economic data

Traditional branches of the economy are the trading of raw materials and semi-finished goods from the wood, textile and metal sectors. The electronics industry has experienced a boom by taking on production orders for the Scandinavian market leaders in the communications industry, and the transportation of Russian oil also constitutes a considerable proportion of GDP. In addition, an increasing number of jobs is being created in the constantly growing tourism branch. After Finland and Sweden, Estonia's most important trading partner is Germany.

GDP at respective prices

(total in bn. EUR):

2001	2002	2003	2004
6.7	7.5	8.0	8.8

GDP proportion of the EU (25) in %: 0.1

Gross Domestic Product

(total, per capita, EUR):

2001	2002	2003	2004
4889	5498	5942	6583

GDP according to purchasing power per inhabitant: 50.4 % of EU 25 (2004) 44.8% (2001)

GDP growth rate (%):

2001	2002	2003	2004
6.4	7.2	5.1	6.2

GDP according to sector (2002, %):

- Manufacturing industry 17.5
- Real estate, leasing, business services 17.1
- Transport and warehousing, communication 14.6
- Wholesale and retail 13.0
- Construction 6.3
- Education 5.1
- Financial services 4.2
- Agriculture and hunting 2.8

Währung:

Estonian Kroon, EEK (100 Cents = 1 Kroon)

Currency system: Currency Board System

Exchange rate: 1 EUR = 15.65 EEK

Inflation rate (%):

2001	2002	2003	2004
5.8	3.6	1.3	3.0

Source: Eurostat

Budget deficit (% of GDP):

2001	2002	2003	2004
0.3	1.8	2.6	0.7

Gross foreign debt (million EUR):

5,657.7 (2003) or 69 % of BIP.

National debt (million EUR):

382 (2003) or 4.7 % of BIP.

Tax ratio (% of GDP): 21 (2003)

Overall ratio of levies (% of GDP): 33 (2003)

Unemployment rate (%):

2001	2002	2003	2004
11.8	9.5	10.2	9.2

Employment structure according to sector (2002, %):

- Industry 25.9
- Construction 6.6
- Service sector 58.0
- Agriculture 4.5

Export/import (in million EUR)

2001	2002	2003	2004
3696/4798	3633/5078	3994/5732	4703/6727

Proportion of households with:

• Connection to sewerage system	89.6 %
• Telephone at home	58.7 %
• Internet access	31 %
• Savings	55 %

Current economic situation

The Estonian economy continues to grow, the predicted growth rate for 2005 being 6.5 %. The basis of this growth is the full order books being enjoyed by exporting industry, rising consumption within the country and the increasing level of investment in Estonia. The only drawback remains the continuing current account deficit, a further disadvantage being deficits in the field of innovation, notwithstanding the success story of the new technologies sector. The most recent "EU Innovation Indicator" (January 2006) has Estonia bringing up the rear alongside Spain, Poland and Slovakia.

Future opportunities and risks

After Finland, Germany is Estonia's most important export market. The main import goods are semi-finished products in the vehicles, machine, chemistry and foodstuffs sectors. Increased consumer demand in Estonia means that foreign companies are able to benefit. Tax breaks and the fact that wage costs remain relatively low also make Estonia a preferred location for foreign investments.

Sources: German Office for Foreign Trade, Network of International Technological Cooperation

Commercial law

It is important to be aware that foreign investors enjoy equality in Estonia, meaning that there are no limits either on the amounts of capital and profits they are permitted to repatriate or on the acquisition of land. Local presence is also important, this usually taking place via a commercial agent. Business is done on a payment in advance basis.

Source: East Westphalian Chamber of Industry and Commerce in Bielefeld

Forms of enterprise

The following forms of enterprise are possible in Estonia:

- **One-person company**, may be founded by any natural person.
- **Tä isuhing (TÜ)**, similar to an unlimited company. For the establishment of a TÜ at least two partners are required, who then become a legal entity when the company is entered in the trade register.
- **Üsaldusühing (UÜ)**, similar to a limited partnership. Comparisons may be drawn with an unlimited company, although certain restrictions apply in respect of liability.
- **Oasaühing (IOÜ)**, similar to a private limited company. A minimum capital of EEK 40,000 (approx. €2,600 €) is required for the establishment of such a company.
- **Aktiaselts (AS)**, similar to a public limited company. A minimum capital of EEK 400,000 must be subscribed.
- **Cooperative societies.**

Sources: KSV1870, Estonian Investment Agency

Employment law

Estonian employment law is based on the Employment Contract Act of 11 July 1992. Compared with the rest of Europe, legal protection for employees and the role of trade unions is accorded a low level of significance, the overriding priority being given to economic development.

Employment contract

Employment contracts must be drawn up in writing. Although unlimited contracts are the norm, limited contracts of employment are possible.

Working time

Regular working time is 40 hours per week.

Leave

There is a right to 28 days' leave a year.

Wages/salary

Average salary in 2003 was €455, although there are differences depending on location or employer. Wages in the capital were significantly higher, for example. There is a currently discernable trend towards wage increases, brought about by rising prices, the increasing shortage of skilled workers and the intensifying attempts by other countries to lure away workers since Estonia's accession to the EU. In 2004, average gross wages grew by an average of 8 %. Good salaries are paid in the state public service sector. Wages at foreign companies are about 34 % higher than those paid in domestically based companies.

Sources: German Office for Foreign Trade, European service of the German Federal Employment Agency

Labour market

In 2005, unemployment in Estonia was 7.9 %, although the rate of youth unemployment was very high at over 20 %. The Russian minority in the North-East of Estonia is worst affected, the average rate of unemployment here being 17 %. In the regions where the economy is booming, unemployment is insignificant at 2 %. Most of the population works in industry, although the proportion working in the service sector is constantly rising. The declining population will lead to a shortage of skilled workers in the production and service sectors in the medium term, another reason for this being that specific vocational education and training does not enjoy great popularity, many Estonians preferring to embark upon a higher education course of study.

Sources: German Office for Foreign Trade, European service of the German Federal Employment Agency

Social situation

The Estonian social insurance system covers health insurance, unemployment insurance, family benefits, social benefits for the disabled, pension insurance, state unemployment assistance and death benefits. After the change in system, reformers were mostly driven by neo-liberal thinking, meaning that social security did not play a significant role. Since the end of the 1990's, there has been a change in emphasis and reforms of unemployment insurance and pension insurance have been carried out. The close ties between Estonia and the Scandinavian countries are also discernable in the social system.

Social insurance

In Estonia, a 33 % social tax is levied on all wages and salaries (13 % for health insurance and 20 % for pension insurance). This applies to remunerations made to board members and members of supervisory boards and incomes from individual companies just as much as it does to employees' incomes. This tax is paid by the employer alone, even if workers are operating abroad. The social tax is used to fund state social benefits such as health insurance and pensions.

Pensions

The pension reform introduced a three-tier pension system, supporting both state pensions and purely private pension provision. Pensions comprise a flat-rate sum, which is funded via the social tax. This increases according to the length of time and amount of money paid in. Since 2002, there has been a compulsory supplementary pension insurance scheme for persons aged 18 and over entering the labour market. Older workers may take out supplementary insurance on a voluntary basis. The basic pension is currently EEK 663.70 EEK (€42). Pensions are subject to tax unless they are below the poverty level of EEK 4,200 EEK (€268).

Sources: European service of the German Federal Employment Agency, KSV 1870, Friedrich-Ebert Foundation, European Commission

Demographic situation

Estonia has a population of 1.35 million, made up as follows: 68 % Estonian, 25.2 % Russian, 2.1 % Ukrainian, 1.3 % Belerussian and 0.9 % Finnish. There are particular tensions between the Estonians and the Russian part of the population, the latter having been settled in the country during the period of Soviet rule. These tensions have their roots in Estonian legislation, particularly citizenship law, and the strained nature of bilateral relations between Estonia and the Russian Federation. The low birth rate and emigration mean that Estonia's population is declining. The ongoing emigration and the extremely low birth rate of 1.5 children per woman has led the Estonian Statistical Office to fear "a disappearance of the nation" in the long term. The proportion of the population under 14 years of age is currently 15.5 %, the 15 – 64 group constituting 67.7 % and those over 65 making up 16.8 %.

Sources: CIA Worldfact Book, Konrad Adenauer Foundation

Negotiating in Estonia

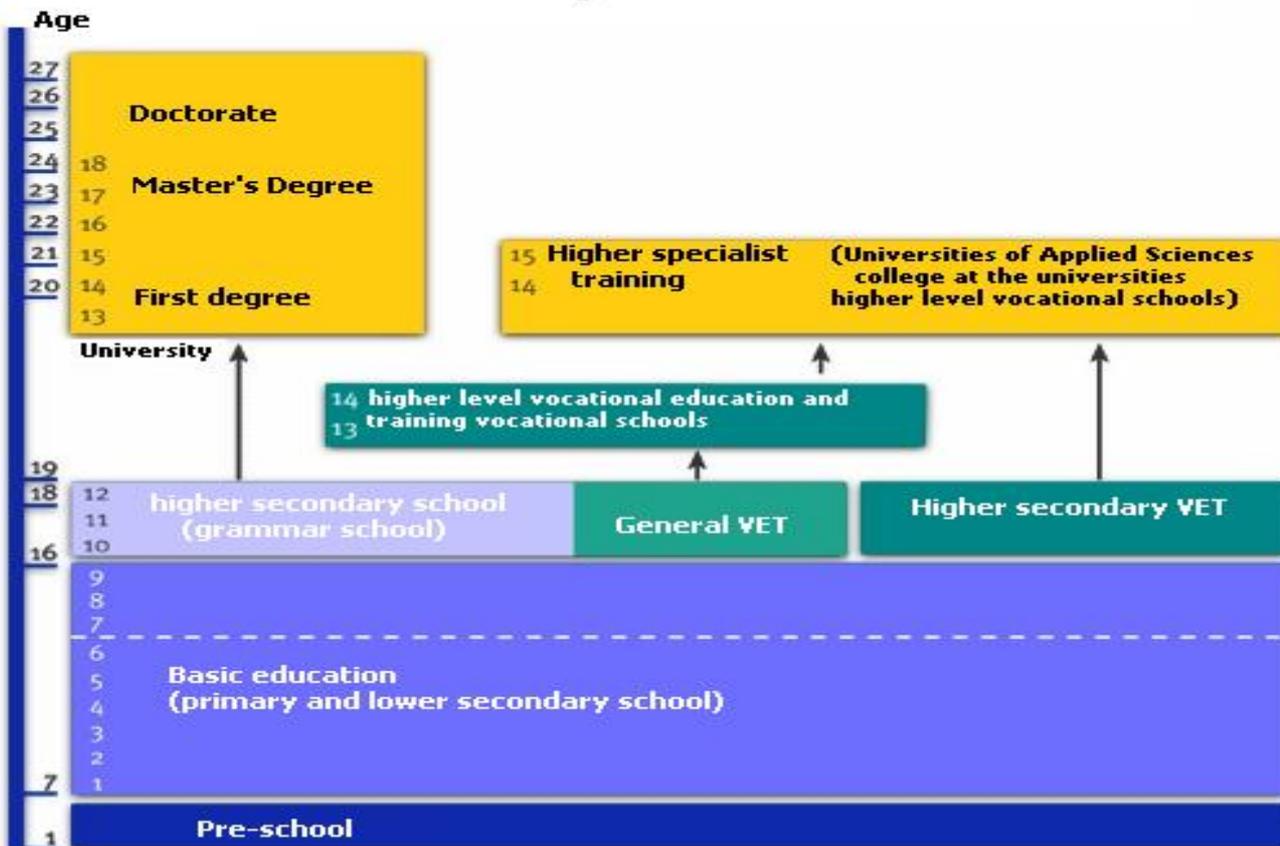
Estonian culture is similar to that of its Scandinavian neighbours. Estonians are very proud of their culture and history, and visitors should respect this. The Estonians particularly do not enjoy being described as "Baltic" (the same applying to the Latvians and Lithuanians), feeling this does not pay due regard to their independence.

Expect to encounter young negotiating partners. Estonia's management elite is frequently between 25 and 35 years old.

The similarities to Scandinavia are also reflected in the ways in which business negotiations are conducted. They take place within a reserved atmosphere, are carried out in a quiet tone of voice and feature extremely unobtrusive gesturing. Greetings are exchanged with a handshake. Estonian business partners are irritated by people speaking loudly and emotionally and employing animated body language. The same goes for the content of discussions. Estonian business partners start by understating the services they provide. Clearly structured presentations based on facts are well received. Speculating on future events will not bring any kudos. Demonstrations of marked self-confidence will be interpreted as boastfulness. The Estonians attach considerable importance to punctuality. They are very good listeners and, by the same token, view interruptions as a gross discourtesy. They often require a lengthy period of time to come to a decision. Once a contract or a project has been concluded, Estonian business partners will fulfil these promptly and reliably. Alongside Estonian, the main business languages are English and, less frequently, German.

Source: Frank, Anna and Sergey (2004): *Brücken der Verständigung in den EU-Beitrittsländern ("Bridges to understanding in the EU accession countries")*, in: Hofmann/Fritsche (Eds.): *So kommen Sie in die EU-Beitrittsländer ("How to get into the EU accession countries")*, Munich.

Estonian Education system



The Estonian education system comprises the compulsory areas of primary and lower secondary education, upper secondary education (grammar schools), vocational schools (vocational education and training) and the higher education sector.

Schools

Compulsory schooling begins at the age of seven and continues until the completion of the nine-year period of basic schooling (lower secondary school) or until the age of 17.

Upper secondary education is of 3 years' duration including the 12th class and is state funded. In order to obtain the upper secondary school leaving certificate on completion of grammar school, at least three official state examinations need to be taken alongside the upper secondary school leaving certificate examinations. In September 2003, there were 240 grammar schools in Estonia.

Vocational education and training

Vocational schools are mostly state funded and provide teaching which runs parallel to upper secondary schools and institutes of higher education. There are currently 71 vocational schools in Estonia, 17 of which are run by private sector providers. Administrative reform of the system of vocational schools is an object of current debate, the consequence of which would be the consolidation of small, local vocational schools into larger, regional VET centres. Many vocational schools have already implemented this plan, leading to the establishment of several qualified vocational education and training centres in southern, central and eastern Estonia.

Vocational education and training takes place on the basis of general lower secondary or upper secondary education (grammar schools), rendering it possible for those leaving both lower and upper secondary schools to continue their training at vocational schools. In 2002, Parliament passed a law recognising foreign skilled worker qualifications.

In Estonia, initial vocational education and training takes place exclusively in vocational schools. There are two different training levels. Anyone completing basic schooling may complete a three-year secondary VET course in order to obtain a certificate which enables access to higher-level vocational education and training.

Pupils who have obtained an upper secondary qualification (upper secondary school leaving certificate or secondary VET) may proceed to higher vocational education and training and achieve a higher level VET certificate in one to two years, although such certificates are more in the nature of attendance certificates which record the programme, the level and the school conducting the training. This system will alter in future when a professional qualifications system is introduced. Vocational qualification may be continued in post-secondary technical schools, where qualifications obtained confer the entitlement to university entrance.

Institutes of higher education

Higher education courses of study may conclude with a degree or be pursued via a foundation course of study comprising 3 levels. Estonia has a dual higher education system comprising academic training (universities) and non-academic training (teaching institutions at a similar level to higher education). Since 1999, there have also been a number of vocationally oriented teaching institutions providing training at higher education level.

There are a total of 6 state universities (31,000 students). Only one of these (Tartu) is a university in the classical sense, offering the whole spectrum of subjects. All others specialise in one area (agricultural and engineering sciences, education, music).

In addition to this, there are 9 private universities (7,000 students), offering at least one programme of study which leads to the degree of “Baccalaureusekraad” (the 1st possible higher education degree). These universities are self-financing, sometimes receiving state funding for special programmes of study which are in the public interest. Most private universities concentrate on the subjects of economics, law and international relations.

In 2002/2003, Estonia introduced reforms to its higher education courses within the context of European harmonisation. Since this time, Estonian universities have been providing courses leading to the “Bachelor” (Bakalaureusekraad) and “Masters” (Magistrikraad) degrees.

In addition to this, there are *non-academic teaching institutions*, the main focus of which is on vocational knowledge and skills. These institutions sometimes offer vocationally oriented higher education programmes of study. There are eight state and five private “Rakenduskorgkool” (with 6,500 and 5,800 students respectively). In the same way as the private universities, the private Rakenduskorgkool focus their programme of study on the social sciences (economics, law and international relations).

There are also seven *vocationally oriented teaching institutions*, permitted to offer higher education training (degree course).

Both sorts of teaching institutions conduct vocationally oriented courses of study (nursing, midwifery, social work). These courses are of three years’ duration, those completing them receiving a “degree” with an addendum denoting the vocational specialist area.

Source: Estonian embassy in Berlin

German language links

German Chamber of Commerce in Estonia

<http://www.ahk.de/bueros/e/estland/index.php>

Baltic Chamber of Commerce in Estonia, Latvia, Lithuania

<http://www.ahk-balt.org/>

Estonian Investment Agency

<http://www.investinestonia.org/>

Guide for investors and exporters:

https://www.myksv.at/ksv_edit/KSV/download_de/939-LeitfadenEstland.pdf

Basic vocabulary

Greetings, introductions, taking your leave

Hello / goodbye (informal)

Hello (formal)

Goodbye (formal)

What's your name?

My name is ...

My (sur)name is Kamińska.

How are you?

Fine thanks, and you?

Very pleased (Nice to meet you).

Happy birthday!

Tere / nägemist

Tere päevast

Head aega / Nägemiseni!

Mis on teie nimi?

Mu nimi on ...

Kuidas käsi käib?

Tänan, hästi, aga teil?

Väga rõõmustav.

Palju õnne sünnipäevaks!

Making yourself understood

I don't understand.

I don't speak Estonian.

Do you speak German/English/French?

Ma ei saa aru.

Ma ei räägi eesti keelt.

Kas te räägite saksa keelt / inglise keelt / prantsuse keelt?

Little words

Thank you, thank you very much

Please, you're welcome

Yes

No

Good

Bad

I don't know.

Tänan, Tänan väga

Palun

Jah

Ei

Hästi

Halvasti

Ma ei tea.

Apologising

Sorry

Sorry I'm late.

Sorry, I'm in a hurry.

Sorry, I'm busy.

That doesn't matter.

Palun vabandust, Vabandage mind

Personal information

First name

Surname

Address

Telephone number

E-mail

Nationality

Citizenship

Age

Date of birth/place of birth

Occupation

Training

Family status: single (fem. & masc.), married (fem. &

masc.), divorced (fem. & masc.), widow/widower

perekonnanimi, liignimi

aadress; kõne, kõnetus;

elektronpost

rahvus

kodakondsus

Vanus

sünnikoht

Pronunciation: õ is pronounced like ö by pushing the corner of the mouth outwards, v is pronounced w and h sounds like the ch in the Scottish pronunciation of the word 'loch'