

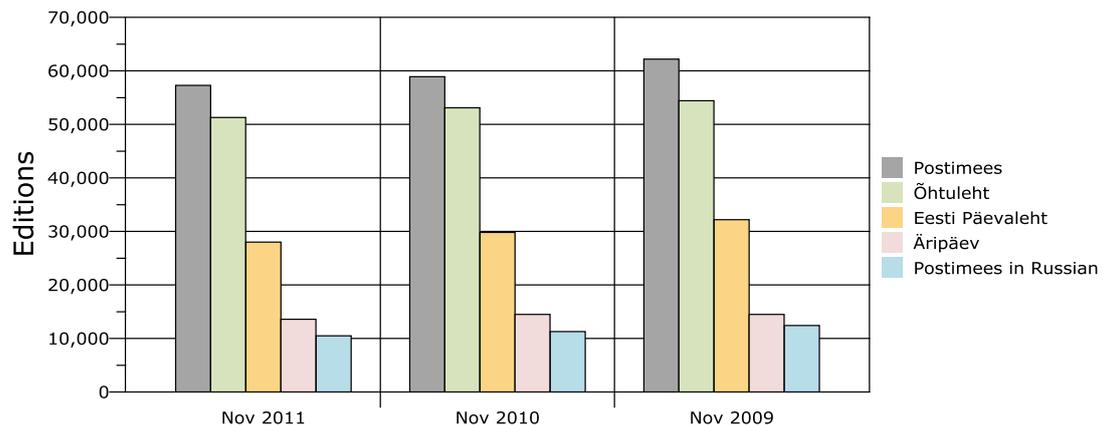
The Media Landscape of Estonia

The Estonian print media evolved into a diverse and widespread system in the beginning of WW I. In the 1920s and 1930s a free and independent journalism developed, which was increasingly repressed since the beginning of the Soviet occupation. From 1945 to 1988 the newspapers and other media channels were part of an ideological media system, in which the communist party controlled the contents.¹ The following independence of Estonia initiated a rapid development of the media business; several old actors were revived and new ones established. In the 1990s, more and more media actors started their business in Estonia, but because of the consequentially increased competition merging into bigger corporations became common. These newly established media groups were often bought by foreign investors. The same tendency continued in the 21st century, which is why many media actors in Estonia are owned by foreign investors today.

Print media

There are currently 94 newspapers published in Estonia that are issued in different variations. Of these 94, 13 are daily newspapers, 10 of which are published in Estonian.² In this chapter, daily and weekly national newspapers are analyzed separately. Chart 1 shows the five largest daily national newspapers.

Chart 1 Editions of national daily newspapers



Source: Estonian Newspaper Association³

¹ Peeter Vihalemm. Eesti meediakasutus ja meediasüsteem Eestis 1965 - 2004, Tartu: Tartu Ülikooli Kirjastus, 2004.

² Estonian Statistical Office

³ <http://www.eall.ee/tiraazhid/index.html>

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ESTONIA

MEELIS NAABER

December 2011

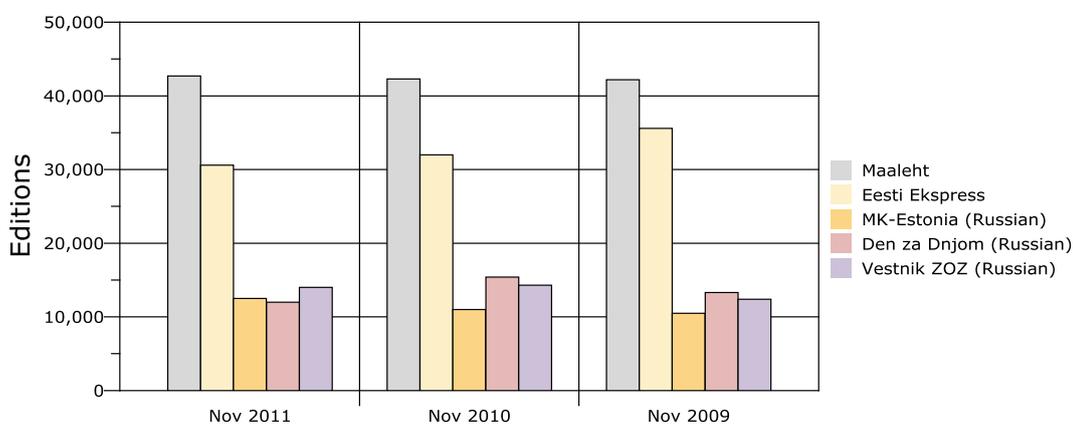
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In recent years, two daily newspapers have dominated the print media sphere. Although print-runs have decreased among all issues, Postimees has maintained a slight edge on Õhtuleht. The third biggest newspaper according to print-runs, Eesti Päevaleht, has only half as many editions as Postimees and Äripäev (which mainly focuses on business news) even less than that. The Postimees in Russian has the smallest number of editions among the five biggest national daily newspapers.

The two top-ranking newspapers are quite different. When Õhtuleht clearly started to commercialize in the beginning of the 21st century, Postimees has maintained an overall focus to more broad-based journalism. But signs of gutter press are appearing more and more also in Postimees.

Whilst there is only one daily national newspaper in Russian among the five biggest national newspapers, there are several more that are published weekly. Chart 2 shows the print-runs of the five biggest national weekly newspapers.

Chart 2 Editions of national weekly newspapers



Source: Estonian Newspaper Association⁴

The sphere of national weekly newspapers is also dominated by two issues – Maaleht, which is a newspaper aimed at rural people and Eesti Ekspress, which is considered to be the best paper in investigatory journalism. The three subsequent newspapers are published in Russian and have significantly fewer readers.

Concerning specialized journalism the situation is quite meager. The only newspaper focusing on politics and international relations is the Diplomaatia which publishes opinion articles from different Estonian and foreign scholars and politicians. It is published monthly and in Estonian, with a short summary in English.⁵ The next best specialized newspaper is Sirp, which mainly focuses on culture but frequently publishes articles concerning social topics as well.

Radio media

There are currently 35 radio stations in Estonia, of which 5 are public and 30 private owned.⁶ Table 1 gives an overview of the most listened Estonian and Russian radio stations. In the big picture, radio stations can be divided into two groups – those who focus on

⁴ <http://www.eall.ee/tiraazhid/index.html>

⁵ <http://www.diplomaatia.ee/index.php?id=597&L=1>

⁶ Estonian Statistic Office. Available at <http://pub.stat.ee/px-web.2001/Dialog/Saveshow.asp>

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entertainment and music and those whose program is aimed at a more educative and intellectual audience.

ESTONIA

MEELIS NAABER

Only two stations belong to the second category – a public station called Vikerraadio and the private-run Kuku Raadio. They both offer a wide range of talk-shows, educative lectures and discussions about relevant political and social issues. The other 32 stations mostly focus on music, entertainment and current news.

December 2011

www.kas.de/estland

Table 1 Average number of listeners per week in 2010

Radio station	Average number of listeners
Vikerraadio (<i>Public</i>)	333 000
Sky Plus (<i>Private</i>)	289 000
Elmar (<i>Private</i>)	257 000
Raadio 4 (<i>Public in Russian</i>)	183 000
Ruskoje Radio (<i>Private in Russian</i>)	179 000
Sky Radio (<i>Private in Russian</i>)	143 000

Source: TNS Emor

In 2010, 69.4 percent of all radio programs were published in Estonian and 28.6 percent in Russian. That is remarkably close to the corresponding percentages of Estonians and Russians living in Estonia. The overall percentage of commercials was 2.3 percent, which amounts to a total of 6200 hours.⁷

Television media

There are 7 domestic TV-channels in Estonia, of which 5 are nationally broadcasted. The Estonian Public Broadcasting offers two channels – ETV and ETV2 – which are both generally in Estonian, only some programs in ETV2 are in Russian. Besides that, there are the two private channels Kanal 2 and TV3. Both of them have affiliated channels – Kanal 11, Kanal 12 and TV6 respectively. In addition, there are some local channels like Tallinn TV in Tallinn and Alo TV in Tartu.

In November 2011, the residents of Estonia watched an average of 4 hours of television per day. Estonians spent 3 hours and 48 minutes in front of the TV and non-Estonians 4 hours and 27 minutes. Among Estonians the time mainly allocates to Kanal 2 (25.4%), ETV (21.6%) and TV3 (18.9%); among Russians mainly to PBK (27.4%), NTV Mir (10.3%) and RTR Planeta Baltic (9.5%).⁸ As there are no Estonian television channels in Russian the main percentage of the non-Estonian residents watch Russian TV-channels and are therefore cut off from the Estonian channels of communications.

In 2010, the percentage of programs published in Estonian was 90.3 percent and the percentage of programs in Russian was close to zero. Commercial accounted for 11.7 percent of the total hours and resulted in 8162 hours on air. This illustrates, that the Russians in Estonia, who do not speak Estonian, do not have access to domestic news from television. The fact that, in average, Russians watch one more hour TV per day than Estonians highlights a serious weakness on the way to a successful integration. For now, many Russians only have access to Russian TV-channels, which often broadcast Estonian news without the necessary impartiality. Only local radio stations are currently broadcasting local news in Russian without external influence.

⁷ Estonian Statistical Office

⁸ TNS Emor. Available et <http://www.emor.ee/teleauditooriumi-ulevaade-novembrikuus-2011/>

Konrad-Adenauer-Stiftung e.V.

ESTONIA

MEELIS NAABER

December 2011

www.kas.de/estland

When comparing radio and television media in Estonia it becomes clear that commercials are much more important in television than in radio, constituting respectably 11.7 percent and 2.3 percent of the total airtime. As the public radio and TV stations are commercial-free only private stations are allowed to broadcast advertising.

A completely different topic concerns Tallinn TV, which is run by the city of Tallinn, but broadcasted nationwide. The establishment of this channel created a lot of discussion due to allegations of its propagandistic purpose. The fact that the channel is funded with up to 2 million € of the city's budget raises concern about its necessity, since several other policy fields are underfinanced (e.g. kindergartens; this issue has been addressed by several groups but had only few success). The mayor justifies the channel with the need to broadcast important information to the people of Tallinn, even though the program is actually quite meager and barely offers competition to public broadcasting and private channels.

Internet

Internet media has been the most rapidly growing and evolving branch in the media industry. The growing speed and interactivity of the distribution of information makes it tempting for people to use the internet. And as nearly 71 percent of households in Estonia have a direct connection to the Internet the media channels there are widely used.

Nearly all the newspapers in Estonia have their own website to publish some extracts or the whole contents of their print edition. The larger newspapers also run an online news-service with constant updates. The most popular ones are postimees.ee and ohtuleht.ee. In addition to that, there is a website concentrated only on online news – delfi.ee – which belongs to the same company as Eesti Päevaleht and Eesti Ekspress and therefore acts as an online news broadcaster for them. There is also a public online news service, err.ee, which is run by the Estonian Public Broadcasting.

Additionally, there is an online news service, BNS, that intermediates online news from the Baltic states. In contrast to previous services it is not free of charge, but offers professional and trustworthy information accessible at all times.

Public and private media

As already stated above, there is one public media company – Estonian Public Broadcasting – which emerged from the merger of Estonian Radio and Estonian Television in 2007. It consists of two TV channels and five radio stations plus an online news service. All the other media enterprises are private, including all the largest print media mediums. Since the public broadcasting does not broadcast commercials all of its funding comes from the national budget.

The private media in Estonia mostly belongs to large media groups, except for some small issues. The largest print media groups are Eesti Meedia and Ekspress Group, which have ownership of all the largest newspapers in Estonia. Eesti Meedia is owned by the Scandinavian media group Schibsted, Ekspress Group, on the other hand, is owned by Estonians.

In the field of television media the Schibsted group is also represented with Kanal 2. Additionally, the international media group Modern Times Group owns TV 3 and its affiliated channel TV 6. Together with the Estonian Sky Media and Communicorp from Ireland, both groups also own some of the largest radio stations. An overview of the largest media groups acting in Estonia is given in Table 2.

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Table 2 Media groups in Estonia

Media group	Print	Television	Radio	Internet
ESTONIA MEELIS NAABER	Postimees County newspapers 50% of Õhtuleht	Kanal 2 Kanal 11 Kanal 12	34% of Trio LSL – Kuku, Elmar, Uuno, Spin FM	Postimees.ee
December 2011 www.kas.de/estland	Eesti Ekspress Eesti Päevaleht 50% of Õhtuleht Maaleht	-	-	Delfi.ee Epl.ee Ekspress.ee
Estonian Public Broadcasting	-	ETV ETV2	Vikerraadio Raadio 2 Raadio 4 (Russian) Klassikaraadio Raadio Tallinn	Err.ee – news in Est, Eng and Rus
Modern Times Group (international)	-	TV3 TV6	StarFM Power Hit Radio	-
Sky Media (Estonian)	-	-	Sky Plus Raadio 3 Energy FM Russkoje Radio (Russian) Sky Radio (Russian)	-
Communicorp (Ireland)	-	-	Shareholder of Trio LSL– Kuku, Elmar, Uuno, Spin FM	-

Source: Homepages of media groups