

# The Estonian Media

## Contents:

- The Development of the press from the restoration of independence to the present day
- Printing and Distribution
- Ownership Concentration
- Electronic Media
- Legal Framework and Training
- Future Trends
- Tables

*The Estonian media is a vibrant sector at the forefront of change in Estonian society. The number of daily papers is a staggering seven (possibly a world record of dailies per thousand of population). There is a plethora of weekly papers and magazines. Estonians face a choice of 4 domestic TV channels and a host of radio stations, all for a population of just 1.5 million. Economically, the big media organisations are on sound footing but many smaller ones are struggling to survive. The multitude of media organisations means there is a pluralism of ideas. The Constitution guarantees freedom of speech and the fact that Estonia does have a free press is recognised by various international press freedom bodies, like the US-based Freedom House.*

## The Development of the press from the restoration of independence to the present day

Today's media landscape has been shaped by the changes brought by the independence movement that began at the end of the 1980s.

The press has moved completely away from state control and is an independently run sector. The government holds a stake in only a few cultural and educational publications but they enjoy editorial independence from the authorities.

Before the restoration of independence in 1991, the press was controlled by the Communist Party. There was absolute state ownership of the press and no private newspaper was allowed to publish. Through a censorship body called Glavlit, screening was conducted at all major national newspapers. Although strict restrictions were placed on the contents of the press in the Soviet period, people were avid readers. One reason was that the price of newspapers was subsidised by the state. Also, newspaper readership has been traditionally high in Estonia. Regular Estonian-language newspaper publishing goes back to 1857 when the Perno Postimees started publishing, of which a paper of the same name still appears in southwest Estonia. In 1990, Estonia was among the countries with the highest number of newspapers sold per thousand people (523 copies). By 1995 the figure had dropped to 171, according to World Press Trends.

The transformation of the press, from being a tool of official Communist ideology and part of the state-run system into a privately run sector, took place in an evolutionary manner from the end of the 1980s to 1994. Contrary to predictions, this transformation did not result in massive closures of titles or other major structural changes, although the market has contracted and sales have decreased.

The first of the new privately operated newspapers, set up at the end of the 1980s, introduced a new style of reporting - more probing, bolder, and a presentation that took its cues from the tabloid press.

One of the first of these new papers to be created was Eesti Ekspress, a general interest and entertainment weekly set up in 1989. Almost a decade later, it continues to be a key weekly paper, although it no longer stands alone in its Western-style image. The circulation of Eesti Ekspress has been steady since its inception - it started with 40 000, hit the mark of 60 000 and has now dipped slightly to 56 000.

The first newspaper to be privatised was the Postimees daily, published in Tartu. Today, this paper is the nation's top-selling title, with a daily circulation around 60 000.

The state continues to finance some cultural periodicals but editorially, these newspapers and magazines set their own policy. The majority of newspapers are published by private companies, some of which involve foreign ownership (the business daily *Äripäev*, for example, is 100 per cent owned by Sweden's Bonnier Group).

In the provinces, however, some municipal government bodies publish their own newsletters, most of which are distributed free to local residents. There is no fixed state subsidy system of the press in Estonia. Every year, however, the parliament earmarks a certain sum for the postal authority, Eesti Post, to subsidise the delivery of periodicals to the countryside.

Estonian newspapers have three main sources of financing: advertising (approximately 40 per cent of revenue), subscriptions (40 per cent), and newsstand sales (20 per cent). The proportion of revenue varies for each paper.

Newspapers claim to have complete editorial independence from political parties and the government, and in an overwhelming majority of the cases it is so. A few parties have tried to publish their own papers but none have survived as a regular publication.

Editorial columns in newspapers rarely state a party political preference. Even on the eve of elections, newspapers do not advise their readers on how to vote.

### **Printing and Distribution**

Prior to the restoration of independence, publishing activity was carefully monitored by the state. The bulk of Estonia's newspapers and magazines were printed at the Communist Party printing plant in Tallinn. Regional papers were printed in local printing plants all over the country.

The former state newspaper printing plant in Tallinn is now known as PrinTall, which continues to print most of the country's national papers, as the market leader. The facility belongs to the government but is operated by a shareholding company. There has been no sign of state interference with this facility.

The Tartu-based Postimees publishing group has built its own printing plant, which also prints for other companies. Numerous regional printing plants have been privatised.

Newspaper distribution no longer relies on the state monopoly system as there are a number of private operators in servicing the larger cities.

### **Ownership Concentration**

There has been a growing tendency towards ownership concentration. Publishing companies owning one newspaper or magazine are being forced to sell out to bigger publishing concerns, or

have gone out of business. In 1994, for example, there were 11 national dailies in Estonia, while in 1997 there were 7 national dailies.

The main newspaper figures at the end of 1997 were as follows: (members of the Estonian Newspaper Association)

- 7 national dailies (5 in Estonian, 2 in Russian)
- 18 weeklies (12 in Estonian, 6 in Russian)
- 22 regional papers (18 in Estonian, 4 in Russian)
- The overall number of papers is approximately 100, including advertising papers.

As a result, the national market is dominated by two key publishing groups: Postimees and Meediakorp, both of which are involved in the publication of newspapers and magazines. In the field of magazines, Eesti Ajakirjade Kirjastus is emerging as a new group, which published 5 magazines in 1997.

The circulations of the papers have seen a dramatic decrease. The largest circulations at the end of the 1980s exceeded 200 000 per title (in a population of 1.5 million where Estonians were under a million). The largest circulations in 1997 were in the range of 60 000.

The combined daily circulation of all the member papers of the Estonian Newspaper Association in 1992 was 831 400. In 1997, it was 661 200.

An indication of the heated competition between the three main daily papers was the launching of Sunday editions in September 1997 which began to publish 7 times a week.

The press has been successfully defending its large share of the advertising market, in competition with the electronic media. According to Baltic Media Facts, newspapers received nearly half of the total advertising revenue in 1996, followed by TV with 23 per cent, and radio and magazines, both with under 10 per cent.

The number of Russian-language papers has continued to grow over the past six years but they have a relatively small circulation compared to Estonian publications. There are also several English-language newspapers published in Estonia. Furthermore, more than 40 Estonian-language periodicals are published abroad.

Estonia has two news agencies. The Estonian News Agency (Eesti Teadeteagentuur, ETA) is a domestic agency owned by the government. The Baltic News Service (BNS), founded in 1990, is a private regional news agency covering Estonia, Latvia and Lithuania.

Newspapers have united into an umbrella organisation called the Estonian Newspaper Association (EALL). Since 1991 EALL has been a member of the World Federation of Newspapers (WAN). In 1997 it also joined the European Newspaper Publishers Association (ENPA).

The Association of Estonian Broadcasters (ERL) is an associated member of the US group National Association of Broadcasters (NAB) and the World Association of Community Radio Broadcasters (AMARC).

## **Electronic Media**

The first public TV broadcast in Estonia was in July 1955. Regular, live radio-broadcasts began already in December 1926. Deregulation in the field of electronic media has brought radical changes compared to the beginning of 1990s. The first licences for private TV broadcasters were issued in 1992. The first private radio station went on the air in 1990.

A major change on the TV scene took place in 1993 when Estonia stopped the transmission of broadcasts of Russian TV channels from Moscow and St Petersburg. The three channels used to be part of the daily viewing diet of people in Estonia during the Soviet period.

Eesti Raadio (Estonian Radio) and Eesti Televisioon (Estonian TV) are public legal entities which are independent in the creation of their programmes, but whose activities are supervised by a Broadcasting Council, appointed by the Riigikogu (Parliament). Since 1993 the two public broadcasting companies have been members of the EBU.

Today, the public station Eesti Televisioon has a daily Russian news programme, plus a half-hour magazine programme and longer shows over the weekend. Channels from the Russian Federation can now be viewed on cable TV. Several Finnish TV channels can be watched in the northern part of Estonia.

Estonia has the following TV stations:

- one public service channel - Eesti Televisioon (ETV)
- three private TV channels - TV1, Kanal 2, TV3

The public service radio station Eesti Raadio broadcasts on four different channels (general information channel, the commercial wing for young listeners, the classics channel and the Russian channel).

There are 33 radio stations operating in Estonia as of August 1997. One of them, owned by Trio LSL, is building up a national network, while others are local.

Although financed from the state budget as well as from advertising, government interference has not been an issue for public service radio and TV since 1990. At the end of 1997 the Broadcasting Council agreed to drop advertising from ETV as of 1998. Private broadcasters consented to compensate ETV for the expected loss of revenue.

Electronic media have more foreign ownership than newspapers. For example, Norway's Schibsted has a stake in Kanal 2 and Sweden's Kinnevik in TV3.

### **Legal Framework and Training**

From a legislative point of view, Estonia offers a liberal environment for the media. There is no law on the press as such in Estonia; cases regarding libel are covered by civil and criminal codes. In libel cases, the burden of proof rests with the media. The press in Estonia is also affected by the Copyright Act, Competition Act, Language Act, Advertising Act and State Secrets Act. There is no Freedom of Information Act.

Broadcasting is governed by the Broadcasting Act, passed in 1994. The law provides for the allocation of licences for private broadcasters as well as setting the foundation of public service TV and radio.

In 1997, the Ministry of Culture started drafting a new set of laws for the electronic media, one for the broadcasting sector in general, and another for the public service stations.

The Estonian Constitution, passed in 1992, provides for freedom of expression and states there can be no censorship. On the other hand, the clause sets certain restrictions on the exercise of the freedom of speech, concerning the publication of information about state secrets, for example.

Estonia has a liberal policy regarding the print media: no licence, permit or registration is required to set up a newspaper. The same applies for using the services of a printing plant or the distribution of a publication.

In December 1997 the Estonian Newspaper Association passed a Code of Press Ethics, the first of its kind in post-independence Estonia. Other media organisations joined in by approving it.

The Code also serves as a foundation for the Press Council, a voluntary self-regulatory body to handle complaints about the press.

Journalism studies are available at three universities in Estonia: at the University of Tartu, at Tallinn University of Educational Sciences, and at Concordia International University Estonia.

Short-term skills training sessions are provided by the Estonian Media Centre in Tallinn as well as the Estonian Newspaper Association.

### **Future Trends**

The future will bring further media concentration, particularly in the case of regional papers, which have started attracting the interest of publishing firms in Tallinn and Tartu. The disappearance of some titles and stations is almost inevitable, as the market seems too small to support so many papers, TV and radio stations.

A shaky financial basis hinders the improvement of quality. While in the press some big players do make a profit, the commercial TV stations are unprofitable.

The radical step of removing advertising from public service TV in 1998 is likely to bring changes in the TV landscape, where the commercial stations have been struggling to get both advertising and viewers.

Tarmu Tammerk,  
Managing Director of the Estonian Newspaper Association

### **Tables**

<b>Combined daily circulation of member papers of the Estonian Newspaper Association (incl dailies, weeklies and regionals)</b>	
Oct 1992	831,400
Oct 1993	739,300
Oct 1994	764,800
Oct 1995	725,500
Oct 1996	650,600
Oct 1997	643,800

Source: The Estonian Newspaper Association

Daily papers, circulations (in Dec 1997)	
Postimees	59,000
Eesti Päevaleht	37,200
Sõnumileht	30,500
Xhtuleht	24,400
Дзiрдеv	16,300
Molodyozh Estoni	9,800
Estoniya	10,000

### Media Advertising Expenditure

Total advertising revenue in Estonia in 1996 was 409 million Estonian kroons, which was divided as follows:	
print media	46%
TV	26%
radio	12%
magazines	9%
outdoor	7%

Source: Baltic Media Facts

TV and video equipment penetration in 1997	
TV set	97%
2 or more TV sets	28%
Colour TV set	89%
Video cassette recorder	23%

Source: Baltic Media Facts

---

This fact sheet was published by the [Estonian Institute](#) in January, 1998 and is intended to be used for reference purposes. It may be freely used in preparing articles, speeches, broadcasts, etc. No acknowledgement is necessary.