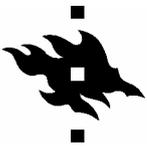


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Mapping Communication and Media Research: Estonia

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Abstract:

Mapping Communication and Media Research is a Communication Research Centre (CRC, University of Helsinki) project that examines the contents and trends of current communication and media research in seven countries: Finland, U.S.A., Germany, France, Japan, Estonia and Australia. The research project is funded by Helsingin Sanomat Foundation.

The purpose of the project "Mapping Communication and Media Research in Estonia" is to give a general overview of the Estonian social and political context, its media markets and current research trends. The focus of the project is on mass communication research, but it also takes into account studies on linguistics, organizational communication, research on civil society and minorities as well as communication technology when they are related to media and communication research. In order to understand Estonia, its media markets, and related media and communication research, a short historical delineation of the changing media landscape is provided. The report is based on various data sources. In total, 22 scholars, journalists and media specialists were interviewed for the report. Additional data includes information from databases, statistics, research literature and various secondary sources.

The Estonian field of the academic media and communication research is geographically concentrated and the number of professional researchers remains low. A major part of traditional communication and mass media publications in the field is produced by the University of Tartu. Tallinn University is specialised in the related fields: linguistic structures of Estonian society; studies on civil society and media; and, social and political strategic communication between different language groups within the society. However, in terms of funded research projects, Estonian academic media and communication research has an amazingly large and diverse number of different projects; varying thematically and in size.

A major strand of the current research relates to the societal change that took place in the early 1990's, the role of the media in this process, and its effects on media. Media, language and ethnicity and media technology are also popular topics of research. Estonian media and communication research is largely empirical by nature. The quantitative research tradition has been strong, especially at the University of Tartu. Qualitative methodology has started to come into general use amongst the younger research generation.

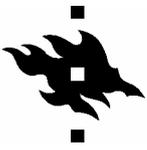
Given the small size of the country, Estonian research activity is remarkable. Besides the researchers, many media specialists from the field admitted that the role of media and communication research in Estonian society is increasing. The reason for the increased need for information is clear and lies in an understanding of the knowledge-based management of economic and cultural change.

Keywords: Estonia, media and communication research, transitional society



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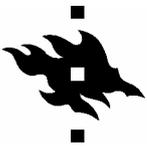
Introduction

Mapping Communication and Media Research is a Communication Research Centre (CRC, University of Helsinki) project that examines the contents and trends of current communication and media research in seven countries: Finland, U.S.A., Germany, France, Japan, Estonia and Australia. The research project is funded by Helsingin Sanomat Foundation.

The focus of the project is on mass communication research, but it also takes into account studies on linguistics, organizational communication, public relations, research on communication technology as well as economy of communication when they are related to media and communication research. It not only maps academic communication and media research but also research made by governmental institutions and private research agencies as well as – so far as it is possible – private media companies' own research activities.

The objective of the project is to provide a general overview of communication and media research in the aforementioned seven countries. It maps the main institutions and organizations, approaches, and national characteristics of communication and media research in each country. The focus is on the years 2005 and 2006 but some parts of the project have considered sample data from a longer period when relevant. The gathering and analysis of the data was carried out during the Autumn 2006 and the Spring 2007. The sample consists of secondary data from previous studies, existing statistics and primary data from interviews with key personalities in communication and media research.

The main research questions of the project are: What kind of communication and media research is carried out in a specific country? How do different approaches relate to each other? What is the relation between research and communication industries, and what kind of applications does the research have? How is communication and media research focused in each country, and to where will research be directed in the future? There are also specific case studies describing the special challenges faced by each respective country in every sub-project.



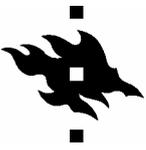
The purpose of the project “Mapping Communication and Media Research in Estonia” is to give a general overview of the Estonian social context, its media markets and current research trends. In order to understand Estonia, its media markets, and related media and communication research, a short historical delineation of the changing media landscape is provided. Estonia can be seen as both a social and media laboratory in which change has been particularly rapid during the last fifteen years. The impact of media regulation, research and development activities, and the cultural tendencies of a transitional society, collaborate to create interesting and measurable dynamics in a small nation-state.

The report is structured in five chapters. The first chapter gives an overview of media markets in their social and political context. The Estonian media landscape can be best understood through the number of changes society has gone through during the last fifteen years. The biggest changes have been the transition from an authoritarian to free-market media system, proprietorial concentration and the increase in foreign ownership, organisation of the Estonian public service broadcasting (PSB), and regulation of media policy according to European standards, in addition to a profound change in journalistic culture.

The second chapter of the report gives a brief account of media policies and regulation in Estonia. From a legislative point of view, Estonia offers a liberal environment for the media. In common with other post-socialist countries, Estonia still struggles with the difficulties of fully guaranteeing the conditions necessary for a well-functioning PSB. This chapter also describes the dilemma of the media-policy making for the Estonian PSB.

The third section gives an overview of Estonian higher education, the university system, and those departments and units where media and communication education, and research activities are carried out. The fourth chapter explores commercial research agencies, media houses and their in-house research units: examining the nature and extent of the research within the commercial and practical field of research. Academic research on communication and media is examined in the light of funded research projects and the division of publication between different themes and topics.

Chapter five explores the main four approaches to communication and media research: 1) media sociology: audience research and media reception; 2) journalism studies, professional cultures and

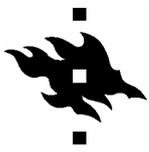


media systems; 3) media, ethnicity and identities; and, 4) technological and new media approaches. All are outlined by giving examples of the projects, researchers and theoretical tendencies that characterise each approach.

The report is based on various data sources. In total, 22 scholars, journalists and media specialists were interviewed for the report. Additional data includes information from databases, statistics, research literature and various secondary sources. The emphasis leans towards the academic side of communication and media research.

In Estonia, unlike in many Western countries, topics of the communication and media research arise from social and political challenges faced by society. Media is explored as part of that society, and not so much as a separate, technical field of activity. Media contents are examined as mirroring the changes in values and norms of the society, rather than through their generic features. A major strand of research relates to the societal change that took place in the early 1990's, the role of the media in this process, and its effects on media. Media use is studied as a part of the change in socio-economic and cultural background of the audience. Journalistic culture is explored through the historical heritage of the Soviet regime as well as through recent challenges created by commercialized media system. Important issues are social integration of the ethnic Russian minority and the two different public spheres: one from each major linguistic/population group in Estonian civil society. Estonian communication and media research often focuses on the larger socio-political frame where media and communication is but one variable among other cultural, social and economic variables. Therefore, the common claim that academic research has withdrawn to an ivory tower does not apply to Estonian media and communication research.

The Estonian field of the academic media and communication research is still geographically concentrated and the number of professional researchers remains low. A major part of traditional communication and mass media publications in the field is produced by the University of Tartu. Tallinn University is more specialised in the related fields: linguistic structures of Estonian society; library studies; and, social and political strategic communication between different language groups within the society. However, in terms of funded research projects, Estonian academic media and communication research has an amazingly large and diverse number of different projects; varying thematically and in size.

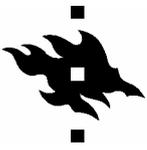


It is important to understand that Estonian researchers have not implemented their research agendas simply by following and imitating Anglo-Saxon or Nordic influences but have instead developed original communication models, study designs and methodological solutions. Estonian media and communication research is largely empirical by nature. The quantitative research tradition has been strong, especially at the University of Tartu. Traditional sociological methods are often in use: content analysis; surveys and questionnaires; experimental research; theme and focus group interviews; and, participant observation. Qualitative methodology has started to come into general use amongst the younger research generation.

The Estonian critical and normative approach has been fused with American pragmatism and the classical MCR –tradition. In addition to analysis of large empirical data, Habermasian tradition (with its local adjustments) is still very strong in the Estonian media and communication studies. French theorists, particularly Pierre Bourdieu and Michel Foucault, are also often used separately or jointly with semioticians. Among these, for evident reasons, the tradition of Juri Lotman has a prominent position.

Naturally, opinions concerning the significance and applicability of media and communication research varies between those interviewed from the media industry, policy-makers, civil servants and academics. In some cases personal consultation and relationships between academia and industry are highly valued, in other cases the value of academic media and communication research was questioned strongly. Whilst foreign ownership of media is often criticized by researchers, this has brought new formats into Estonia. However, media-houses owned by domestic capital have also used academic and market research innovatively as part of their business activities and product development. All in all the use of research is increasing amongst the media houses.

Fears regarding the future expressed by scholars are often linked to research funding, and not so much to the content or financing of education. Only a small portion of current research is supported through the universities' basic funding. Often the research is carried out as part-time activity, on the side of normal teaching and administration obligations. The sectors of Social Sciences and Humanities are clearly underfinanced and this hinders the formation a larger research community with long-term funding.

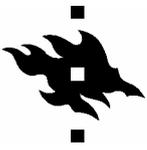


Generally, Estonian media and communication scholars see the future of media research in a positive light. The role of communication and media in the society is increasing and lots of research is needed to tackle the challenges of Europeanization, harmonisation of media policy, and the economic shocks of global fluctuations. However, many of the expert interviewees were concerned as to whether politicians really understood the needs of knowledge-production in the field of social sciences and humanities

Given the small size of the country, Estonian research activity is commendable. Besides the researchers, many media specialists from the field admitted that the role of media and communication research in Estonian society is increasing. The reason for the increased need for information is clear and lies in an understanding of the knowledge-based management of economic and cultural change.

For the Estonian project the following media academics, journalists and media specialists were interviewed: Erkki Bahovski (Postimees, editor, foreign affairs), Martin Ehala (Professor, Tallinn University), Ehtel Halliste (Foreign Ministry of Estonia), Halliki Harro-Loit, (Associate Professor, University of Tartu), Mauri Kaipainen (Professor in New Media, Tallinn University), Mart Kivine (Eesti Päevaleht, editor, domestic affairs), Aavo Kokk (Managing Director, Eesti Päevaleht), Epp Lauk (Professor, University of Tartu), Marju Lauristin (Professor, University of Tartu), Marica Lillemets (President of the Journalists' Union), Kadri Liik journalist (Diplomaatia, former Moscow correspondent), Margus Paas (Kanal 2 Research director), Pille Pruulman-Vengerfeldt (PhD, researcher), Salme Rannu (Estonian Radio), Hagi Shein (Professor, Baltic Film and Media School), Raivo Suni (ETV, Head of ETV and Eesti Raadio Research Section), Tarmu Tammerk (Agence Presse, AFP), Toomas Tombu (AS TV3 Research director), Indrek Treudfeldt (ETV, former Brussels correspondent), Margo Veskimägi, TNS Emor (Managing director, Baltic region), Peeter Vihalemm, (Professor, University of Tartu) and Triin Vihalemm (Associate professor, University of Tartu).

All the interviews were conducted in person and in the face-to-face situations. We wish to express our deep gratitude to all those interviewed for sharing their valuable time and knowledge with us.



1 The Estonian Media Landscape

1.1 Estonian Context

The Republic of Estonia (Eesti Vabariik) is Finland's southern neighbour separated by the Gulf of Finland. Estonia's recent history has been dominated by transition across all the core areas of society since the collapse of the Soviet Union in 1989.

The Republic of Estonia first declared independence on 24th February 1918, and this was finally restored in 1991 after 50 years of Soviet occupation. Estonia became a NATO member state on 29th March 2004; joining the European Union shortly afterwards, on 1st May 2004. In virtually all spheres of public life, Estonia's progress during recent decades places it alongside states with long established free market economies, vibrant civil societies, and well-institutionalized democratic governance rather than other transition states.

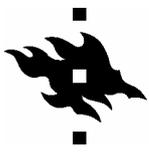
Estonia has 1.33 million inhabitants (as of 01.01.2005), resulting in a population density of 30 inhabitants per square kilometre. Of these 69.3 per cent were classed as urban population in 2005; mirroring the on-going structural change in agriculture and farming. Tallinn is the capital city and the largest urban area with approximately 400,000 inhabitants.

Ethnically, Estonian's population consists of Estonians (68%), Russians (26%), Ukrainians (2%), Belarussians (1%) and Finns (1%).¹ The official language in Estonia is Estonian which belongs to the Finno-Ugric language family and is closely related to Finnish. Alongside Finnish, English, German and, particularly, Russian are also widely spoken and understood.

Estonia is a parliamentary democracy. The current president of Estonia is *Toomas Hendrik Ilves* (Soc.Dem) (since October 2006). The current Prime Minister is *Andrus Ansip* and he is also the chairman of the Estonian Reform Party (Estonian: *Reformierakond*).

The current Estonian constitution is based on Montesquieu's separation of powers and Estonian citizens elect a 101-member parliament every four years. The Parliament appoints the President,

¹ Data according to 2006 Population Census, Statistical Office of Estonia



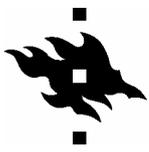
who can hold office for a five year period for a maximum of two terms. The President is the Supreme Commander of the National Defence of Estonia. By convention, the President asks the party leader who has collected the most votes to form the new government.

Estonia's economy continues to grow vigorously, in line with the epithet "the little country that could." GDP growth of 9.8 per cent in 2005, places Estonia among the fastest growing economies in the region. The economy has grown by an average of nearly 6 per cent a year since 1995. The continued growth of exports to western markets, integration with Nordic countries, and institutional and regulatory reforms have laid a strong foundation for sustainable economic growth. The economy is likely to grow by 7 – 8 per cent per year in the near future. Successive governments have adhered to the principles of Estonia's economic policy: a balanced state budget, a stable convertible currency pegged to the Euro (before 1 January 1999 to the Deutschmark), and liberal trade and investment laws.

Although Estonian society has been fairly stable during the last decade, social capital in terms of trust to national institutions have not yet developed as hoped. According to the latest *Eurobarometer* (2006) of national political institutions, the government is the most trusted: 53 per cent of citizens trust it. Trust in the parliament is traditionally lower at 41 per cent. Only 46 per cent of citizens trust the printed media – a figure that compares unfavourably to television or radio. 42 per cent of citizens trust the Internet and 38 per cent do not know what to think about its trustworthiness. In general, younger people are able to evaluate the nature of the Internet better and trust it more than older people.

However, television appears as the most trusted institution in Estonia (75%), ahead of the armed forces (74%) and radio (71%). This compares well with the European Union average where citizens trust the army the most (69%), followed by the police (64%) and radio (63%).

Support for EU membership is increasing again; having dropped in autumn 2005 to its lowest level in the past two years. Discussions about the future of the EU, provoked by failed referenda in Netherlands and France, may be seen as one cause of this.



1.2 Media Markets in Estonia

Estonia's media scene has showed inevitable success during recent years. Today, media operate free of direct political or governmental regulation, and the press is vigorous in reporting on a wide range of problems including corruption, interethnic tension, and overall obstacles to social development. Indeed, in its annual report, the international media watchdog group Reporters Without Borders rated Estonia as the 11th most free media environment in the world. Both print and broadcasting media are politically non-aligned, and this partly due to the fact that party newspapers did not survive the dynamics prevalent in small, open market.

Unsurprisingly for a country occasionally referred to as "E-stonia" for its cutting-edge use of new communication technologies, Estonia is also one of the most Internet-connected countries in the world; providing citizens access to a variety of media sources. On the other hand, as a result of the microscopic size of the market, newspapers are not financed solely by advertising but also by readers, which may make prices relatively high; or by owners, an arrangement that inevitably leads to speculation about their influence on news content and the selection of certain interviews by readers and researchers.²

The Estonian media landscape, however, remains defined by the changes brought about by the independence movement of the 1980s. The press has completely moved away from being under state control and is now an independently run sector. The government holds a stake in only a few cultural and educational publications but even these enjoy full editorial independence from the authorities.

Prior to the restoration of independence in 1991, and in common with other Soviet Socialist Republics, the press was under the strict control of the Communist Party. The State was the sole owner of the press and private newspapers were illegal. Censorship was conducted in major national newspapers through a body called *Glavit* but journalists learnt to write between the lines and pass their camouflaged messages to the readership. Although strict restrictions were in place on the contents of the press in the Soviet period, high readership numbers were encouraged by the State heavily subsidising costs. (see Tammerk 2002; 2003)

² See Goble, Paul (2005) Country Report Estonia. Freedom House. Transitions Online



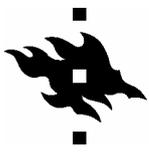
After the restoration of independence in August 1991, major changes in the political and economic environment set in motion corresponding changes in the media system and popular use of media use. During the liberalisation of the press (1991-1994) subsidies and the state ownership were abolished. Most newspapers were privatised and hundreds of new periodicals were established. At the same time a new generation of journalists entered the labour market. (Vihalemm 2006:18; Lauk 1996; 1997). A well-known Estonian journalist pointedly described the new era as “getting rid of the Soviet burden.”

“Yes, they just wanted to get rid of old journalists, there were almost superstitious belief among the younger people. I was completely fresh from university and I was hired with high hopes and big salary that I would come to reshape the Estonian journalism which I wasn't prepared to do. I was 22. I felt that I would need someone who would be smarter than me and from who I could learn, that wasn't a case. The editor-in-chief at the time was younger than me.”

The new generation of journalists were unmarked by experience of the Soviet era nor did they have their older colleagues to act as their role models. Western norms and professional codes were quickly accepted and harsh market conditions which required marketisation of the content and entertainment as part of the media output were regarded as normal. One young Estonian journalist remembers the 90s competition between newspapers quite clearly:

“Our priority in the newspaper was to find scandals, find our own news and find scandals. That is why they made things look scandals that were not really scandals. Really minor things, government a bit this and that. They didn't believe that when we start to construct scandals, people would not believe us anymore when a real scandal strikes. Politicians shall not take us seriously, and they didn't.”

The products of journalism were judged partly by their value from the advertiser's point of view, as a profitable good, but many young journalists were also critical in terms of the hardening of competition between media and the changes that it brought into journalism. (Vihalemm 2006:18)



Newspaper privatisation took place at the beginning of the 1990s, on a case-by-case basis, with the government agreeing that it should no longer be involved in newspaper publication. In most cases, newspapers were privatised by management and/or staff buy-out. A few years later, however, most of the original shareholders sold out to core owners, either from among local publishers or from abroad. Thus, by the end of the 1990s, the number of journalists who were also shareholders in their newspapers had reduced considerably. During the 90s foreign owners entered the Estonian media market along with, mostly, Nordic capital. (Tammerk 2002)

If the press had been very vigorous, it has also been occasionally sensationalist. Indeed, it was former Estonian president Lennart Meri who frequently observed that the road from a Soviet-style controlled press to a genuinely free press passes through a yellow phase. Although much of today's Estonian journalism is outstanding, some of it is still at the level of sensationalist boulevard journalism, where gaining an audience has seemed more important than providing a factually correct piece. As former Moscow correspondent and expert in foreign issues Kadri Liik described the neo-liberal law of Estonian journalism: *"As fast as possible, as much as possible, and as entertaining as possible."* Indeed, both Estonian readers and some Estonian journalists speak of the increasing tabloidization of the Estonian press.

However, the most important development in the Estonian media landscape with larger social and political implications during the last few years has been the appearance of a Russian-language edition of the country's largest daily, *Postimees*: a step that has helped to promote a common public space for the two main linguistic communities. Until this point the two language groups have had mutually exclusive media landscapes with pitifully infrequent overlaps: a situation seen as exacerbating ethnic tensions and delaying the integration of the Russian linguistic minority into Estonian society.

1.3 Newspapers and Magazines

Today there are 133 newspapers and 310 magazines published in Estonia (Source: The National Library of Estonia 2006) with studies reporting a traditionally high newspaper readership in Estonia. Regular Estonian-language newspaper publishing goes back to 1857 when the *Perno*



Postimees commenced publication, and a paper of the same name still appears in South West Estonia. In 1990, Estonia was listed amongst those 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. (Vihalemm 2006:17-16; Tammerk 2002:2)

Although Estonian newspaper circulation numbers are not at the Nordic level they are the second highest of new EU member-states (Slovenia being the first at 251 per 1000 people) and fairly close to the European average numbers of circulation.

Table 1. Dailies: circulation per 1000 people in 1991-2005 (Source: Statistics Finland 2006)

	1990 Total population	2000 Total population	2005 Total population
Estonia	523	192	225
Latvia	-	136	177
Finland	558	445	518
Sweden	528	417	481
Norway	609	574	626
France	165	149	160
United States	249	198	250

According to the TNS Emor media survey 2007, the *SL Õhtuleht* (Evening Newspaper), Estonia's tabloid has 24.3 per cent share of the daily readership market.³ The other main dailies are *Postimees* (Postman) with 22.6 per cent and *Eesti Päevaleht* (Estonian Daily Newspaper) with 13.1 per cent.⁴

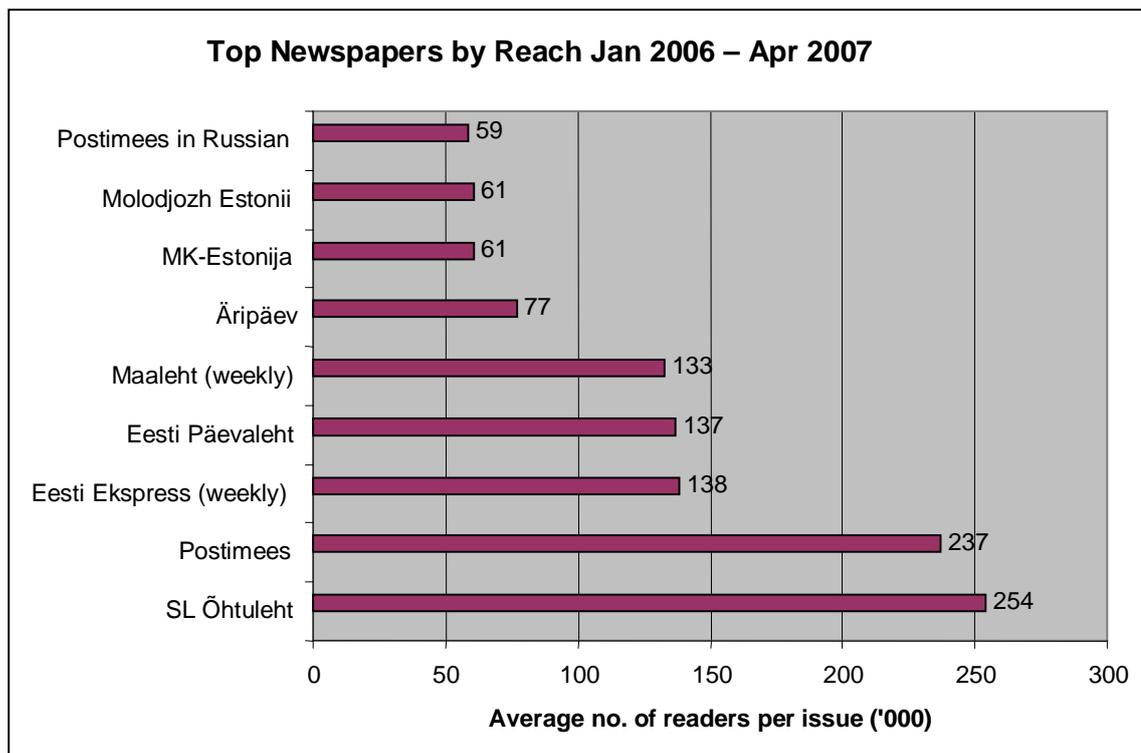
Within this small market, the two biggest dailies enjoy a fairly brutal competition for advertisers and, especially, Tallinn's well-heeled readership. *Postimees* (owned by Eesti Meedia/Schibsted) and *Eesti Päevaleht* (owned by Ekspress Group) have been newspapers with only minor product

³ The average share of population (15-74 years %) who have read the issue. Source: TNS EMOR, Eesti Meediauringud (EMU).

⁴ Until 2000 in Estonia there was quite an unusual situation at the tabloid market. Two rival national tabloids were competing in the same market. The tabloids merged in June 2000 forming *SL Õhtuleht* (50% owned by Eesti Meedia/Schibsted and 50% by the Ekspress Group). Note that the two tabloids were merged whilst the other one was owned by Bonnier. *SL Õhtuleht* has the largest readership among the newspapers, with approximately 237,000 readers and it has steadily increased its annual turnover. (see Harro-Loit 2004)

differentiation. However, *Eesti Päevaleht* has been especially active in developing an individual style: modernising its layout etc.

Picture 1. Top Estonian newspapers by readership (Source: Eesti Ajalehtede Liit 2006)



The one daily business paper *Äripäev* (Business Daily) holds about 7.4 per cent of the market. In the competition between the two national dailies, the readership of *Postimees* has declined slightly during the last year whereas *Eesti Päevaleht* has increased its reach. On the other hand *Eesti Päevaleht* has taken stronger foothold in Tallinn area. These however can be regarded as part of the normal annual pendulum within the market.

In addition to the four national Estonian dailies⁵, there are also three Russian language dailies. Of the ten Estonian weeklies, four are Russian. In addition to national newspapers there are 22 regional newspapers that generally hold a monopoly within their respective circulation areas. The largest Estonian weekly newspapers are: the first privately owned paper *Eesti Ekspress*, market share 11.5 per cent, which launched the new era of the free press in 1989, and *Maaleht* (Country Newspaper) with market share of 12.1 per cent. As with the private broadcasters, several of the

⁵ Members of the Estonian Newspaper Association (Eesti Ajalehtede Liit) year 2006



Estonian newspapers have attracted foreign investors. The Norwegian firm, Schibsted, owns half of *SL Õhtuleht* and most of *Postimees*. The Swedish Bonnier Group owns 100 per cent of *Äripäev*.

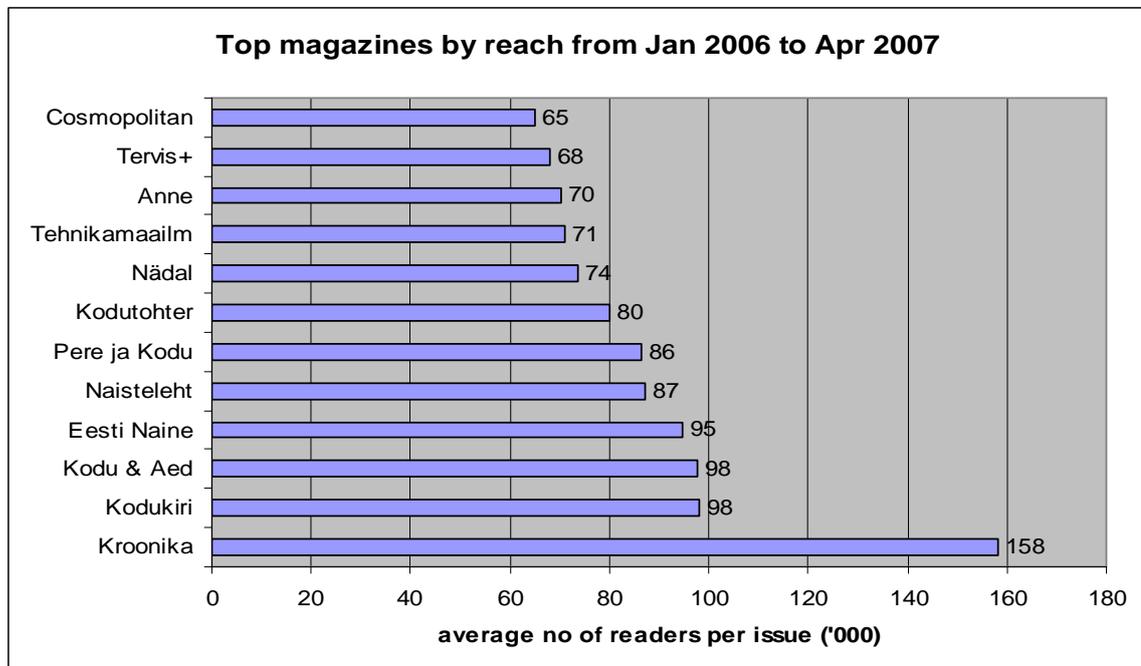
The weeklies market is not as competitive as is the case in the newspaper market. In comparison to the international norm, magazine readership levels are still fairly low in Estonia. Compared to Finnish magazine readership, the Estonian magazines have notably lower reach in different periodical categories. However, the Finnish market for periodical and magazines is known to be fairly competitive and close to saturation.

Table 2. Consumer magazines: Average issue readership 2005 (Adult population)
Statistics Finland 2006 (Source: World Magazine Trends)

	Year	Any consumer titles	Women's titles	TV-guides	General interest
Estonia	2005	66	23	24	16
Finland	2005	92	94	89	94

In terms of reach, the consumer magazines' consumption has decreased slightly since 2000. At the beginning of the century, magazine reading was boosted by a variety of new titles, formats and topics, but started to decrease after 2004.

Picture 2. Top Estonian magazines by readership ('000)



(Source: EMOR Meediauringud 2007)

There is no fixed state subsidy system for 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.

1.4 Television and Radio

Deregulation in the field of electronic media in the early 1990s brought about radical change. The first licences for private broadcasters were issued in 1992, the first private radio station went on the air in 1990, and, in a major break with the past, in 1993 Estonia stopped the transmission of broadcasts of Russian TV channels from Moscow and St Petersburg. These three channels were part of the daily diet of viewing for people in Estonia during the Soviet period. Today, the public channel *Eesti Televisioon* (ETV), with the bulk of the programming in Estonian, also



includes a daily newscast in Russian. Besides ETV, Estonian viewers can watch two private TV channels: *Kanal 2* and *TV3*. (see Tammerk 2002; 2003)

Channels from the Russian Federation can now be viewed on cable TV. In Tallinn and some other parts of Northern Estonia, in addition to the three national channels, it is possible to receive the four main Finnish TV channels that are accessible via terrestrial broadcast.

The public service radio station *Eesti Raadio* broadcasts on five different channels (a general information channel, a commercial wing for young listeners, a classical music channel, Radio Tallinn and a Russian language channel).

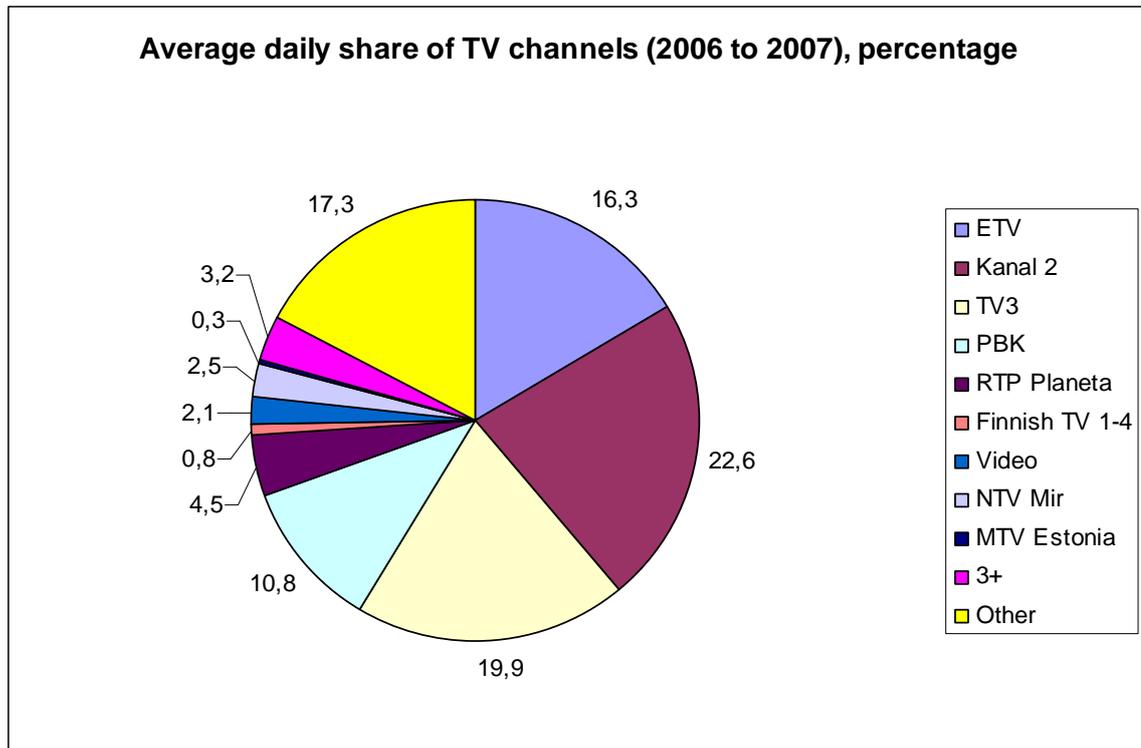
Estonia joined EBU in 1993 and the duality of the television sector was established. The number of TV channels increased markedly during the first stage of development before gradually moving towards its optimal shape into accordance with market mechanisms and competition in a comparatively limited market. In addition, the loss of terrestrially transmitted Russian channels encouraged the development of cable networks.

The opening of the TV media market encouraged foreign investment and ownership. The Baltic States are treated by foreign companies as a single TV- market and foreign investors (Polsat, Viasat) have launched chains of TV-channels across the Baltic area. Audience research and data are provided by the same companies.

Estonia has three nationwide terrestrial television channels: the public broadcaster Estonian Television (ETV, operating since 1955), two private channels, *Kanal 2* (operating since 1993), and *TV3* (operating since 1996). Two local TV broadcasters also exist: one in Tallinn (*Eeter*), and one in Tartu. The private broadcasters hold large market shares (*Kanal 2* 19 per cent and *TV3* 24 per cent, compared to ETV's 18 per cent). Various independent production companies now produce many of the Estonian programmes seen on television today.

Picture 3. Daily share of Estonian TV channels

(percentage of time spent on a channel in proportion to the total time spent watching TV during the period)



(Target group: Estonian population aged 4 and older. Source: TNS Emor, Teleauditooriumi Mõõdikuuring)

The commercial broadcasting sector exhibits considerable vertical and horizontal concentrations, especially through the extensive holdings of Schibsted. Kanal 2 belongs to the Norwegian company Schibsted, and Modern Times Group, a subsidiary of the Swedish company Kinnevik, owns TV3. In its current state the law on media ownership does not provide any measures against concentrations that occur after a broadcast licence has been allocated.

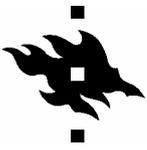


Table 3. Ownership of TV Channels in Estonia

(Source: Hagi Shein 2002)

TV Channel	Ownership
ETV (Eesti Televisioon)	public ownership, public broadcaster
TV3 (commercial)	Modern Time Group, MTG TeleMedia Eesti Eesti Finantsinvest MTV3
Kanal 2 (commercial)	Schibsted (Norway), private investors

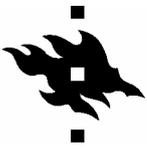
In comparison to international norms, the Estonian public broadcaster ETV's share is modest but with signs of a gradual increase. This compares favourably with the situation in Nordic countries after the deregulation of the early '90s. There the market became more competitive until developing into the virtual battleground for audience share conducted between public and commercial broadcasters found today.

Table 4. Audience shares of domestic public TV Broadcasting 1991-2004

	1991 %	2000 %	2004 %
Estonia	-	17	19
Latvia	-	18	20
Lithuania	-	10	13
Finland	57	42	45
Sweden	78	44	40
Norway	-	41	44

(Source: Statistics Finland 2006)

Over 40 per cent of Estonian households are connected to cable television, which means that many people have access to as many as 60 channels, including many Russian and German channels. There are 14 licensed local cable TV broadcasters in Estonia: several of which produce programmes in Russian.



1.5 Media reception and consumption

Newspaper readership has a long tradition in Estonia. However, the economic fluctuation of Estonia has had an impact on newspaper readership. Increasing living costs, including the prices of newspapers and magazines (in between 1991-1996 they increased some three times the cost of other goods and services).

Daily radio listening stabilized between 2000-2004 at a level of 3 hours and 29 minutes. In comparison, average TV viewing time continues to increase, with an average of 4 hours 30 minutes for the year 2002. When set against international norms, Estonia reached the level of the top 5 television viewing countries in Europe and in the world. (Vihalemm 2006:9; Hasebrink & Herzog 2004)

Social factors that affect media use and consumption are comparable to those found in Finland. Education has a notable effect on press reading, as well as TV viewing and radio listening (the highly educated read more newspapers and watch television or listen to radio less than people with lower education). In the Estonian context, ethnicity is naturally a strong modifier of the media use. Surveys made on ethnicity and media use (Lauristin et al. 1987; Vihalemm 2006: 22) show that press reading and radio listening played a remarkably smaller role in ethnic Russians' daily life.

Newspapers and magazines have been an important part of national integration and identity-building since the middle of the 19th Century, and this role continued through the period of Soviet rule. (see also Hoyer, Lauk & Vihalemm 1993). According to Peeter Vihalemm (2006: 22) the Russian-speaking population, mainly post-war immigrants, have not absorbed local cultural traditions and do not use the Estonian language media. Besides a weaker reading tradition, a crucial factor was undoubtedly the fact that in Estonia there are fewer Russian language channels available.

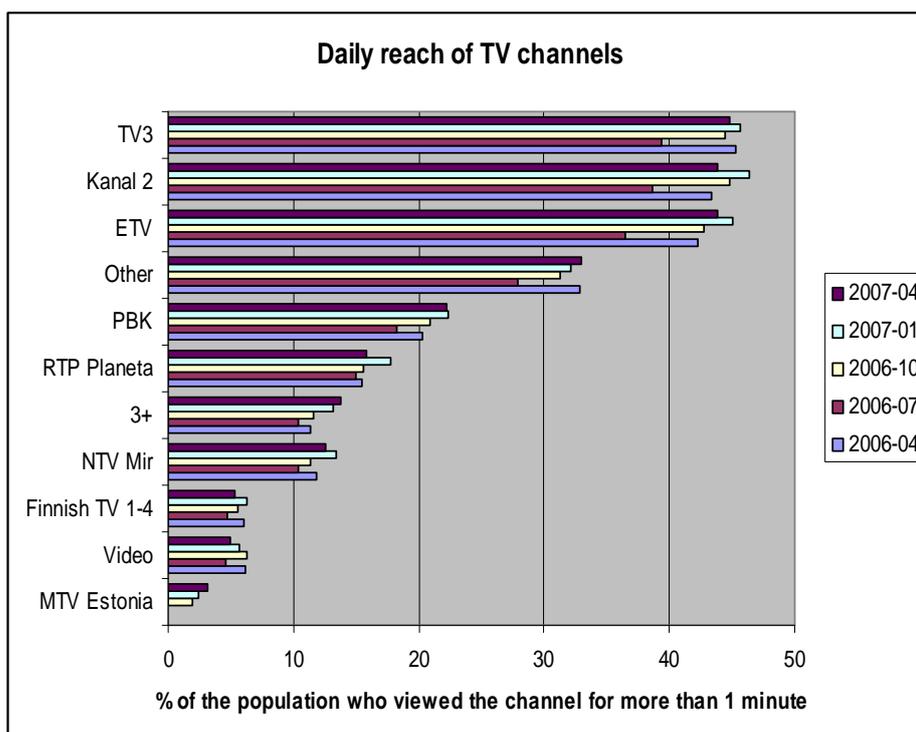
Table 5. Age structure of newspaper readership 2007

Age	% of readership	% daily reach within age group
15-19	8,9	59.1
20-29	17.2	62.5
30-39	17.1	67.0
40-49	18.8	69.6
50-59	17.7	73.9
60-74	20.2	71.2
Total	100	X

(Source: TNS EMOR, Eesti Ajalehtede Liit)

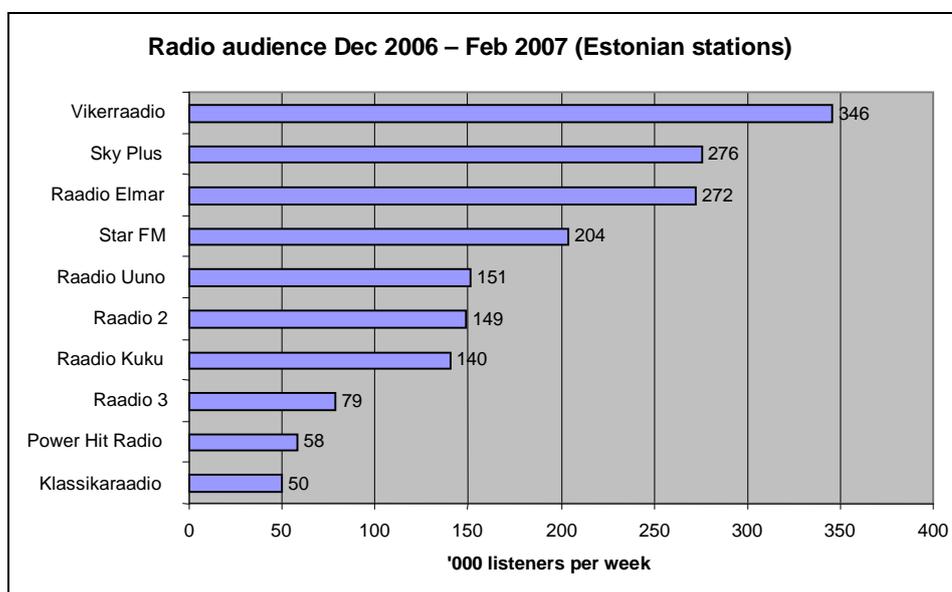
Contemporary Estonia is, to a great extent, a television based culture. Daily reach and time used for television watching has been on the increase during recent years. This trend is in common with all European countries. However, according to Vihalemm (2006: 27), growth in TV viewing can be described as dramatic and this tendency is common to all post-communist countries. This is probably connected in these societies to an increased requirement for relaxation, caused by the rapid transformation of all spheres of life, and the adoption of more intensive, competitive and demanding social conditions.

Picture 4. Daily reach of Estonian TV channels (Source TNS Emor 2007)



Radio listening in Estonia is predominantly (at over 90 per cent of total listening time) conducted in conjunction with other activities: walking, driving, talking and sensing as background music in department stores. Presumably the share of radio listening as a main activity has decreased even more during the last two decades, due to the increasing role of music and entertainment in the content of radio programs. (Vihalemm 2006: 21)

Picture 5. Radio audience for Estonian radio stations

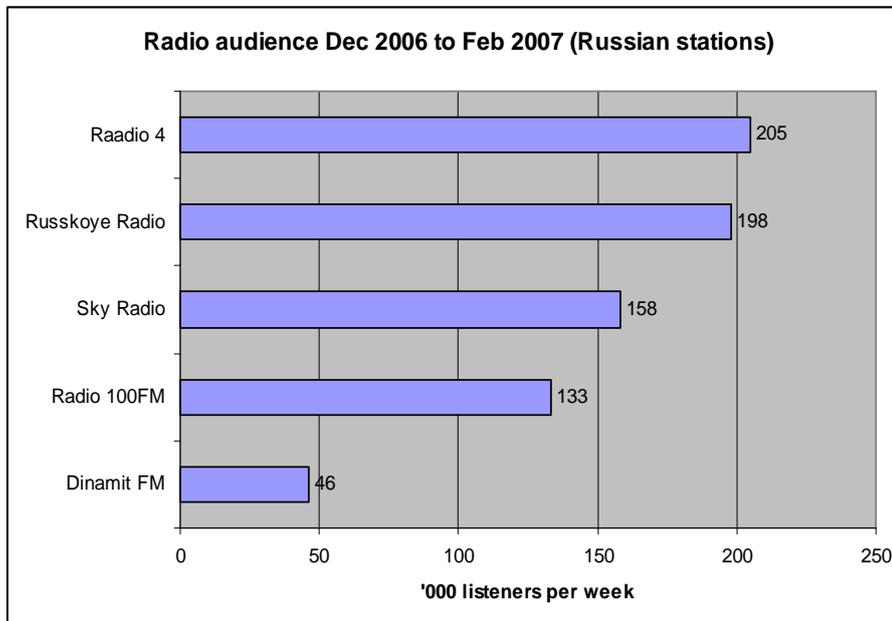


(Source: TNS Emor, Raadioauditooriumi päevikuuring. Target group: age group 12 to 74)

In summarising the general trend for time devoted to daily media (2004) among the adult population, one can estimate that, on average, a media day lasts 9 hours and 20 minutes. According to Vihalemm (2006: 21) this time is spent overwhelmingly with broadcasting (8 hours and 25 minutes), while the estimated time for press reading and Internet usage at only 55 minutes.

The Russian ethnic audience mostly listens to Russian language radio stations. Eesti Raadio's Raadio 4 has the largest share of listeners and its programs are in Russian.

Picture 6 . Radio audience for Russian radio stations



At the end of 2006, Turu-uuringute AS conducted a survey on public faith in broadcasting institutions: 87 per cent of Estonians trust ETV and 79 per cent trust Eesti Raadio. This has increased since the Faktum Omnibus-survey in March 2005 which set the reliability of ETV at 82 per cent and Eesti Raadio at 77 per cent. Public broadcasting ranks amongst the top reliable state institutions, sharing their position with the state chancellor, with Estonian Bank, the President and the Coast Guard office ranked below them.

This public confidence is based on a rise in information content in programming (the web portal ETV 24 was opened in January 2006) and a corresponding increase in production quality in information programmes. The ER programme met audience expectations: the survey of ETV and ER indicated that people valued the quality, objectivity and analytical approach shown in these programmes, as well as the quality of programming.



2 Media policies and regulation in Estonia

From the legislative point of view, Estonia offers a liberal environment for the media. During the accession period to EU media and broadcasting legislation was brought into line and harmonised with the requirements of TWF Directives.

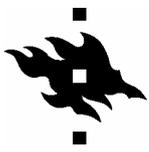
Following difficulties in the stabilisation of public broadcasting, unsuccessful implementation of licence fees, and frequent changes in TV management, new EU member- states established different regulatory structures. In turn, public broadcasters have generally lost their market share as they lost the battle with the, better resourced, commercial sector.

Estonia does not have a general press law although attempts have been made to draft one. Instead, Broadcasting is governed by the Broadcasting Law, passed in 1994. This provides for the allocation of licences to private broadcasters as well as setting the foundations for public service TV and radio. In 1997, the Ministry of Culture instigated the drafting of new legislation for electronic media: one for the broadcasting sector in general, and another for public service stations. (Tammerk 2002; 2003)

Current regulation of the media system in Estonia comprises the following legislation:

- The Copyright Act - Autoriõiguse seadus, 1992
- The Broadcasting Act - Ringhäälinguseadus, 1994
- The Advertising Act - Reklaamiseadus, 1997
- The Communications Decency Act - Pornograafilise sisuga ja vägivalda või julmust propageerivate teoste leviku reguleerimise seadus, 1997
- The Cable Act - Kaabelleviseadus, 1999
- The Telecommunication Act - Telekommunikatsiooniseadus, 2000

Cases regarding libel are covered by civil and criminal codes. In libel, the burden of proof rests with the media. The media in Estonia is also affected by the Copyright Act, Competition Act, Language Act, Advertising Act and Official Secrets Act. – a Freedom of Information Act is in draft.



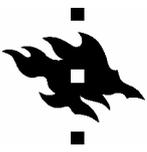
Estonia has a liberal policy with regards to the print media: a licence, permit or registration is not required to establish a newspaper. The same policy applies to the use of a printing plant or distributing publications. The first Press Council was established in 1991 and there are currently two Press Councils operating simultaneously in Estonia (Pressinõukogu and Avaliku Sõna Nõukogu).

2.1 Estonian PBS and dilemma of Policy Making and Research

While a market perspective on Baltic broadcasting might focus on issues such as the concentration of the commercial television market – all three Baltic countries face the dilemma of whether and how to restrict concentration in markets as small as their own – the most striking aspect of broadcasting in the region is that the transition to public-service broadcasting remains more formal than real (Reed 2005, 1). In differing ways and to differing extents, each Baltic State displays a problem common to Central and Eastern Europe: a failure to fully understand the conditions necessary for the emergence of a well-functioning public-service broadcaster.

This has dominated the concerns of both researchers and PSB specialists in Estonia. Professor Hagi Shein, an expert in media regulation and PSB issues, described the situation in which the Estonian PBS suddenly found themselves:

“This is the problem for the new part of the Europe. When we became acquainted with these public service broadcasting principles we haven’t had before that any kind of media regulation and policy research. We haven’t heard anything from public broadcasting as such and when gates then opened and we went to the first conferences – everything we heard sounded very natural to us. That is how the function of democratic media should be organized - serving people, maintaining culture and protecting national language. We, of course expected that our societies would accept immediately all these democratic values of serving public. It wasn’t that easy”



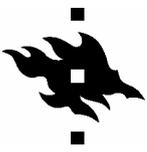
Estonia is an interesting case: regulatory independence is not guaranteed by law yet appears to exist in practice. General broadcasting regulation is the responsibility of the Culture Ministry, yet there is little evidence of political interference in regulation. The same can be said of the regulatory council of the publicly funded Estonian Television, as provisions to ensure representation for all parliamentary parties (five members) along with four specialists have in practice created an independent regulator.

A weakness is minority programming, an important and sensitive issue in Estonia and also in Latvia since both countries have large Russian-speaking communities. Estonia has failed as yet to create a clear policy on minority programming; leaving in place a situation in which the primary source of information for the Russian-speaking population is programming from Russian state television rebroadcast through cable and satellite networks. But making a functional minority program plan on which regulations could be based requires resources and research: "What would a Russian audience need and consume." As Shein described the dilemma:

"Currently we are working in the project how to restructure policies what ETV should have concerning Russian language programming. Questionnaire was done and many experts were interviewed and now we should do some recommendations what to do in this field. Russian audience is not watching any Estonian channels at all, they have their own media. Perhaps have a Russian channel, internet web pages, digitalization leads to that that programs can be sub-titled in Russian, who would do the programs, Russians or Estonians. The biggest question is: What do Russian audience need?"

The other major problem for public broadcasting in Estonia is the absence of an independent, predictable, stable, and adequate system of funding. In Estonia funding comes from the State with the level of subsidy set by Parliament. Legislators are under no obligation to approve funding at the level envisaged by civil servants.

Estonia provides a very interesting illustration of the pervasive problem of funding. Publicly funded ETV agreed to stop selling advertising space in 2002 in return for the two commercial



broadcasters paying higher annual broadcasting fees. The theory was these fees (or a proportion at least) would go to ETV, freeing ETV from commercial pressures.

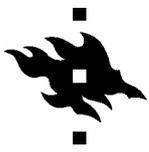
ETV has indeed become increasingly public-service-oriented and the economic situation of commercial broadcasters has improved. However, ETV does not appear to have benefited financially. In 2004, parliament approved a subsidy that was 30 per cent lower than the amount envisaged in ETV's legally-binding, and Parliament approved, 2003-2005 development plan. As a result, ETV was left with a budget insufficient to produce programs of lasting value (such as films), to carry out investigative journalism, or to invest in technical development and archiving. (Reed 2005, 3). Hagi Shein recalls the first steps of implementing the ideas of PBS role in Estonia:

"Most surprising has been how difficult it has been for politicians, people, people involved has been to understand these values at all. And in this regard it has been the same in these new-comers. Same difficulties have been faced everywhere. Still many people and politicians are claiming why we need PBS at all, why put all this money when private sector could do it all and even cheaper and how difficult it has been to find argument against that."

The Estonian example illustrates how true public-service broadcasting is not a priority for policymakers in the Baltic States, so much so that legislators are prepared to violate their own commitments in order to "save" money. In such a situation, it should not come as a surprise that some of the key components of a non-commercial broadcaster committed to serving the public, such as minority-language programming, are absent.

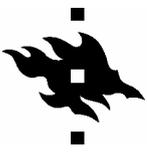
In common with all EU member-states, Estonian broadcasting regulations have been brought into accordance with the EU Television Without Frontiers Directive by the Estonian Broadcasting Act, which was amended in 1999 and 2000. The Convention's principles have been included in the draft of a new broadcasting law in Estonia.

"Interesting was that it was said that European media policy wasn't taken fully into the consideration of the small countries with their national interest and protecting their



national cultures. Different countries have used different options to protect their interests and regards. Latvia for example has very different policies and as a result from that you see very different media content, programming principles, different channels and orientations which finally lead to different media cultures. Latvians are very eager to protect their language, the stipulations and laws all focus on that. Estonians are very liberal and it finally led that some of the channels didn't have much Estonian programs at all, news that is and the rest is foreign programming for just making money without any obligation to your own audience and your own national culture. I'm talking about channel 3 and finally it lost its leading position and I think the reason for that was that it didn't focus on this local level." (Professor Hagi Shein)

There are only five general programme obligations when it comes to television broadcasters: two of these are result of the EU "Television without Frontiers" (TWF) Directive. The so called "Euro-quotas," the share of programming time for European productions, has drawn criticism from Estonian media industry representatives for not taking into account the specific nature of small markets. (Loit 2005: 561)



3 Research institutions and organizations

3.1 Universities

In Estonia there are two main universities where the study of social sciences and humanities is conducted: The University of Tartu and Tallinn University. The University of Tartu was, until recently, the only centre of journalism education and mass media research in Estonia. At the start of the 21st Century the academic landscape of Estonia changed considerably with the foundation of Tallinn University through the merger of several existing universities and research institutes in Tallinn as well as the Estonian Academic Library in 2005. After a short period of tension between the two national universities, research networks and co-operation between them started to emerge. As Professor Marju Lauristin described his vision of the future of Estonian academic landscape:

“The future shall probably be such that we will have a national network of universities, like in, for example California. There is one umbrella term like “University of Estonia” and universities of Tartu and Tallinn are parts of that. I think that will be the only possibility in a small country if we want to stay and function in Estonian. We can collaborate perhaps only with Finland but that is only possibility develop in terms of language. (laughing) But certainly this network will advance. ”

In Estonia there are a total of 11 programmes containing higher educational courses in media, journalism, communication, communication management and other related subjects. The only PhD programme in Media and Communication is at the University of Tartu, Faculty of Social Sciences, Department of Journalism and Communication. Research activity within these educational units is often secondary to teaching and administration: an additional task to be squeezed in by staff between numerous other activities. Yet, a considerable amount of research is produced and research projects are conducted annually in various departments.

3.1 Academic Programmes in Media and Communication

In order to become a valid educational and/or research unit, each programme has to pass international accreditation. The institution of higher learning and its curricula are accredited by

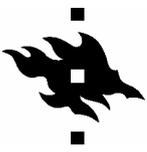


the Higher Education Quality Assessment Council, which is appointed by the Government of the Republic of Estonia and which operates under the jurisdiction of the Ministry of Education. *Accreditation is an exercise* during which an institution of higher learning is assessed to determine whether the institution and its curricula meet the requirements laid out in relevant legislative and regulatory documents.

The standard of higher education is a set of regulations instituted by the Estonian Government. It specifies the purpose of a given programme of instruction leading to a certification of trade, vocational, or professional competence; the list of trades and occupations to which its regulations apply; and the general requirements that curricula must meet.

Table 6. Academic programmes in the area of media and communication

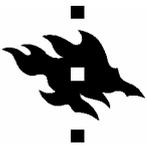
Institution/ Programmes	Description of the programme
University of Tartu, Faculty of Social Sciences, Department of Journalism and Communication BA in Journalism and Public Relations	Previously taught as separate specialities, Journalism and Public Relations are now integrated into a single curriculum of three years. A Bachelor graduate of Journalism and Public Relations has the following options: <ul style="list-style-type: none">- To become a reporter or public relations manager;- To enter post-graduate studies in either Journalism, Communication Management or Media and Communication;- To proceed to another post-graduate programme, if the required number of credit points of pre-requisite subjects for that programme has been achieved.
MA in Journalism	The goal of the Master's programme in Journalism has been to take into account the possibility that a rapidly changing labour market requires people with a varied education: those who have studied journalism at Bachelor level as a major or as a minor speciality. The aim of the Master's programme of Journalism is to prepare students to work as an editor in newspaper, radio, television or on-line media. There are also two seven-week long internships in the news organisations during the 2nd and 3rd semesters. The main goal of the internships is to develop the necessary skills for working independently in a contemporary media organisation. This goal is achieved through the interaction of three processes: practical



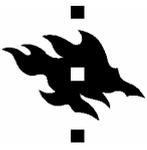
	<p>work in a media organization, self-reflection and group supervision. The latter is aimed at self-reflection and analysis of work experience as well as developing team-work skills. Upon graduation, rather than a professional qualification in journalism graduates gain a Master's degree in Social Sciences in Journalism.</p>
MA in Communication Management	<p>A Master's degree in Communication Management is a universal foundation for any career in the fields of Public Relations, marketing or client service. A graduate would be a future strategic manager of communication in an organisation. Some of the possible options for graduates are: professional consultant in any field (politics, business etc), communication manager or strategist in an enterprise or organization, communication manager in the public sector, project manager in the field of communications or organisations of the tertiary sector. The curriculum consists of general studies (the same as in Journalism, and in Media and Communication) and specialised studies. These contain disciplines that cover: organisational communication, applied communication studies, critical analysis of public communication, consumer culture and social marketing, ethics of communication management, regulation of the information and advertising, self-expression, communication strategy, practical projects.</p>
MA in Media and Communication	<p>This programme is aimed at providing skills and knowledge for working as a highly qualified researcher or analyst in the higher education system, media industry, state enterprises or private business. The main career options for a graduate from this programme are: analyst of media and culture who is able independently to conduct research and interpret empirical data, for example, on the media and culture consumption, value structures in different groups of society, public opinion, changes in society accompanied by the development of information technology etc.; practical media analyst and researcher in a research centre, business or state institution who conducts polls, creates and analyses communication strategies, and is able to carry out research necessary for strategic planning in an organisation; specialist on the new media and information society who analyses the development of information and communication</p>



	<p>technology not only from its technological, but also from the social meaning and importance.</p>
<p>PhD in Media and Communication</p>	<p>Currently, there are two parallel curricula at Doctoral level: Media and Communication, and Journalism. From the start of 2006/2007 study year it is possible to enter only one curriculum – Media and Communication. The graduates obtain the Ph.D. degree in Media and Communication.</p> <p>The duration of the Doctoral studies (160 CP) is four years and the programme consists of obligatory and optional courses (total 40 CP) and doctoral dissertation (120 CP) that will be publicly defended.</p> <p>The curriculum includes:</p> <ol style="list-style-type: none"> 1) obligatory specialised subjects (14 CP): Interdisciplinarity in Social Sciences; International Doctoral School I; Conference as a Form of Science Communication; Introduction to the Advanced Professional Literature; Doctoral seminar; Publication Process of Scientific Research; 2) other specialised subjects (6CP): Critical Analysis of Scientific Conference; International Doctoral School II; Practical Projects (application for research money, editing etc); Elective Seminar on Methodology of the Social Sciences; 3) general studies in Social Sciences common to all Doctoral programmes in the Faculty of Social Sciences (4CP): Methodology of Social Sciences; Topical Problems of Contemporary Social Sciences. 4) pedagogical training for teaching at the University level (4CP) 5) elective subjects (8 CP) 6) optional subjects (4CP)
<p>Tallinn University, Baltic Film and Media School, Department of Media</p> <p>BA in Media (taught in Estonian or English)</p>	<p>Media curriculum has two major specialisations - audiovisual media (television production and TV-documentary) and public relations. The curriculum offers both vocational and theoretical courses and thus prepares students to work in today's highly competitive and demanding media, television and public relations environment. The Faculty includes Estonian and foreign professors and is backed by a well-equipped digital television studio.</p>
<p>MA in Communication</p>	<p>General objectives of the curriculum:</p>



<p>Management (taught only in English)</p>	<p>1) to support students' acquisition of knowledge and skills that would ensure their readiness to become Corporate Communications and/or Public Relations and/or Advertising and/or Marketing specialists, managers or entrepreneurs in respective area(s);</p> <p>2) to offer sufficient opportunities for developing theoretical knowledge and practical skills to prepare the graduates for successful careers in variety of industries as well as governmental and NGO sectors; as such, the programme is business function oriented rather than industry centric;</p> <p>3) to develop students' ability to critically analyse the overall business strategy and tactics from Corporate Communications and/or Public Relations and/or Advertising and/or Marketing function viewpoints as well as to analyse and direct strategic and tactical level of respective business functions, understand the functioning, processes and consequences of activities in the aforementioned area(s) and carry out applied as well as academic research in these.</p>
<p>Tallinn University, Faculty of Philology, Department of Estonian Language</p> <p>MA in Communication</p>	<p>The mission of the speciality of communication is to prepare communications specialists with a wide range of expertise in:</p> <p>1) organisational communication, PR and communication management both in public and private sector;</p> <p>2) intercultural and strategic communication between different cultures and ethnic minorities within society;</p> <p>3) to analyse media and communication within Estonian society and to model ways to improve it;</p> <p>4) to develop methods of communication to facilitate media literacy and communicative skill of comprehensive school pupils.</p>
<p>Tallinn University, Faculty of Philology, Department of Slavonic Languages</p> <p>BA in Journalism (Russian Media; taught only in Russian)</p>	<p>The aim of the curriculum is to provide the basic knowledge on the types, genres, ethical and legal aspects of journalism. The graduates should be able to find professional employment in the Russian media houses in Estonia. They should be able to understand the formation of public opinion.</p>

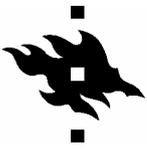


<p>Tallinn University, Faculty of Mathematics and Natural Sciences, Department of Informatics</p> <p>MSc in Interactive Media And Knowledge Environments</p>	<p>The programme aims to equip students with a range of competences, applicable not only to professions related directly with designing, planning, implementing, distributing and management of digital interactive media, but also in positions indirectly assuming vision and critical knowledge of the possibilities and issues of the field. The education aims at a level of abstraction that allows the graduates to re-adapt and update their skills to rapidly changing career profiles. Possible careers addressed include education, leadership in governmental and municipal services, citizen communities, business and entrepreneurship.</p>
<p>Tallinn University, Faculty of Social Sciences, Department of Advertising and Media</p> <p>BA in Publicity and Imagology</p>	<p>The aim of the programme is to train specialists in social sciences focusing on imagology, publicity and advertising. Graduates are able to find and manage relevant information and create new knowledge, critically assess the area and make decisions; is equipped with necessary knowledge and competences to work as a professional.</p>

3.2 The University of Tartu

Until recently all research activity was centred on the University of Tartu. The University of Tartu has long historical traditions and is one of the oldest universities in Europe. It was founded in 1632 by the King Gustavus II Adolphus of Sweden under the name Academia Gustaviana or Universitas Dorpatensis. After having been closed for a long period due to the Great Northern War, the University reopened in 1802 as Kaiserliche Universität zu Dorpat, and made a great contribution to the development of natural and medical sciences as well as other sciences in the 19th Century. In 1919 the University became the first Estonian-language university.

The University of Tartu (UT) has eleven faculties, three research institutes and six colleges with more than seventy departments, institutes and clinics. The total number of students is over 18,000, with a teaching staff of 1,300.



The University of Tartu is the national university of Estonia that links a variety of research areas. Its mission is to preserve and promote a highly educated Estonia by engaging in internationally recognised research and providing research-based higher education through:

Faculties: Theology, Law, Medicine, Philosophy, Biology and Geography, Physics and, Chemistry, Education, Exercise and Sport Sciences, Economics and Business Administration, Mathematics and Computer Science, Social Sciences;

Colleges and Research Institutes: EuroCollege, Narva College, Pärnu College, Türi College, Teacher Training College, Institute of Law, Distance Learning Centre – Open University, Institute of Physics, Estonian Marine Institute, Institute of Technology.

Within the University of Tartu, communication studies have their own department comprising of three chairs. The head of the department is Professor Halliki Harro-Loit and the chairs are divided as follows:

Table 7. Department of Media and Communication, University of Tartu

Chair	Main fields of research
Journalism - Professor Epp Lauk	History of Journalism and Communication, Media Economics, Media Policy and Ethics, Professionalisation of Journalism and Media Literacy. Research in Journalism is largely conducted within the framework of several international projects (e.g., COST A20, COST A30).
Media Studies – Professor Peeter Vihalemm	Relationships between society, media and the individual; development of media system and media usage in Estonia; utilization of practices of digital technology and development of information society; social space.
Social Communication – Associate Professor	Development of communication culture in



Triin Vihalemm

Estonian society and education of communication managers to the highest standard, and enrichment of international Social Sciences through original studies in the communication field.

There are three primary goals:

1. A clearer completion of research direction that synthesizes different approaches. The focus of interest is the communication practices of different spheres of life and the subcultures (political, organisational and consumer) that result.

2. To develop a research and study centre that analyses different communication practices. In addition to enriching Estonian science and educating experts, the task is to spread the corresponding knowledge in society on a larger scale. This is achieved via various publications, public performances, training and collaboration projects.

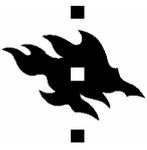
3. To strengthen the professional identity of communication management as a specialized field, the main characteristics of which are social scientific analysis and self-reflection as well as high ethical standards.

The current total of 30 academic staff oversee 321 students in different bachelor level programmes, 56 students in master level programmes, and 30 students in doctoral level programmes.

1957 – 2005: 609 students gained a university degree, at one level or another, in Journalism.

1999 – 2003: 78 students gained a degree in the field of Public Relations.

1993 – 2006: 54 Masters' theses and 8 doctoral dissertations have been defended.



The Professor of Journalism, Epp Lauk leads the interdisciplinary research project: "The methodological problems of integration of cultural and communication sciences" (duration from June 2005 to June 2007). The project integrates nine units from the Social Sciences and Philosophy Faculties: Journalism, Archaeology, Estonian Literature, Estonian and Comparative Folklore, Ethnology, Media and Communication, Theatre Studies and Literature Theory, Semiotics, Social Communication.

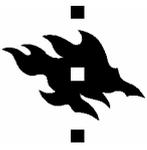
On 17th June 2005 the Council of the University of Tartu ratified the decision to establish an interdisciplinary *Centre for Cultural and Communication Studies*. The aim of creating the Centre is based on the need for an integration of research in humanities and social sciences due to societal development.

The Centre was initiated by the Department of Journalism and Communication, and the Department of Semiotics, thus the Centre will be under the Faculty of Social Sciences

The goal of the Centre is to develop basic research in culture and communication, to organize relevant doctoral studies and to initiate discussions involving public participation. According to the head of the Journalism Department, Associate Professor Halliki Harro-Loit, the establishment of the Centre also reflects an intention to bring together the best researchers in culture and communications to initiate complex basic research projects, as culture and society involve a number of complex issues, and this needs to be studied from multiple view points and various disciplines.

3.3 Tallinn University

Tallinn University was established on 18th March 2005 as the result of a merger of several universities and research institutes in Tallinn as well as the Estonian Academic Library. Its main strengths lie in the fields of humanities and social sciences, but it also has a strong and constantly growing component of natural and exact sciences, as well as a notable tradition of teacher training and educational research.



The University consists of six faculties (Fine Arts, Educational Sciences, Physical Education, Philology, Mathematics and Natural Sciences, and Social Sciences), two academic institutes (Institute of History, and Estonian Institute of Humanities), the Baltic Film and Media School as well as four research institutes (Institute of Estonian Demography, Institute of Ecology, Institute of Educational Research, and Institute of International and Social Studies) and two regional colleges. At present, there are around 7000 students as well as more than 400 faculty members and research fellows; leading to it being the fastest growing university in the country.

The Baltic Film and Media School (BFM) was founded by the Council of Tallinn University on 28th March 2005 as an independent educational and academic institution. BFM started its academic activity in January 2006 when Tallinn University's Film and Video Department (launched in 1992) and the Media School of Audentes University (launched in 1997) were merged.

There are two chairs in the Media Department:

- Chair in Television and Audiovisual Media, Hagi Shein
- Chair of Communication Management, Ivar Soone

There are 136 students on the BA level (Media), and 19 on the MA level (Communication Management). The 1-year MA programme that was conditionally accredited in 2004 has now been restructured into a new 2-year programme, which will receive its first students in the summer of 2007. Professor Hagi Shein conducts research into media history (Estonian broadcasting) and media regulation.

Hagi Shein has been the Director General of Estonian Public Television (elected for the period 1992-1994 by the Estonian Parliament and for 1994-1997 by the Broadcasting Council). Since May 1999, he has been the Head of Management of the Estonian Media Educators Union. Prof. Shein served as the representative of the President of Estonia at the National Minorities Round Table and was an elected member of Tallinn City Council 1999 – 2001. In April 2000, the Estonian Parliament appointed him a member of the Broadcasting Council of Estonian Public Television and Radio, from 2001 he has been a member of the Board of Estonian Film Foundation and from 2002 a member of the Academic Council of the President of Estonia. He also represents Estonia in a working group on media policy in European Council.

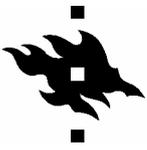


The Department of Estonian Language in the Faculty of Philology launched a MA programme in Communication under the Chair of General and Applied Linguistics (CGAL) in 2002. Its foundation was motivated by the need to broaden career opportunities for graduates from philological BA specialities as well as to strengthen media education for the students preparing to become mother tongue teachers. CGAL has a strong interdisciplinary emphasis on integrating communication studies with mother tongue didactics (media literacy) as well as with sociolinguistics studies of language contact in Estonia. The goals of these studies are mainly applied, directed towards the multicultural development and greater integration within Estonian society. At present CGAL has 8 full time members of staff with 34 students enrolled in the Communication MA programme.

The Staff's main areas of scientific activity are connected to the study of communication and civil society, collective identity, and the communicative process of identity construction and dissemination. These studies are closely connected to the development of a public sphere and involve staff activities in the field of language contact and interethnic communication in Estonia, as well as mother tongue and media teaching methods. As the subject of mother tongue and literature is one of the main educational tools for transmitting and developing collective ethnic identity, the results of the studies in the field of communication can enhance elaborating new methods of identity building in communication- and mother tongue education.

During the last years the department has established connections with the following networks:

- 1) Research network on Estonian identities, including the Institute of International and Social Studies at the University of Tartu, the Department of social communication at University of Tartu and the Department of General and Applied Linguistics at Tallinn University. In CGAL, the following members of staff are connected to this network: Professor Martin Ehala, Associate Professor Inka Salovaara-Moring, and Ms. Triin Kallas.
- 2) European Concerted Research Action: COST network of "East and West: Setting a New Central and Eastern European Research Agenda," including Central European University (Budapest), Eotvos Lorand University of Sciences (Budapest), Charles University (Prague),



University of Udine, EU External Affairs Unit (Berlin), University of Milan, University of Nijmegen, University of Wroclav (Poland), Jagiellonian University, National Broadcasting Council of Poland, Romanian Academic Society, Institute of Social Science (Serbia and Montenegro), University of London, University of Westminster, Lund University, University of Helsinki and Tallinn University. In CGAL, the following members of staff are connected to this network: Inka Salovaara-Moring (Member of the Managing Committee).

The department is conducting the following research and development projects:

A development project funded from a state programme, "Estonian language and collective memory": "Database of Estonian identities". The database includes the results of research publications in the fields of sociology, social psychology, ethnology, ethnography, semiotics, culture etc. that are relevant for characterising one or the other social group's collective identity. The database is planned to be a useful source for background information necessary for designing communicative messages for these groups. The project started in August 2004.

A research project funded by the Academy of Finland "European Public Sphere: Uniting or Dividing?" The goal of the project is to research the dynamics of European civic societies, media systems and public opinion formation. The project is funded for three years (2005 – 2007). In CGAL, the following members of the staff are connected to this project: Inka Salovaara Moring (researcher of the project).

The Department of Slavonic Languages in the Faculty of Philology offers a BA programme in Journalism (Russian Media) since 1996. It is coordinated by Associate Professor Aurika Meimre and the number of students currently enrolled is 80.

The Department of Informatics in the Faculty of Mathematics and Natural Sciences has offered a MSc programme in Interactive Media and Knowledge Environments (IMKE) since 2006, there are currently 5 students in the programme. The special focus of the IMKE curriculum is on knowledge environments, that is, digital interactive environments that host and facilitate individual and shared knowledge construction, in contexts such as educational environments, e-service environments, e-participation environments and game environments. The programme is coordinated by Professor



Mauri Kaipainen. There is close cooperation in tuition and research with the Centre of Educational Technology of the same department.

The Department of Advertising and Media in the Faculty of Social Sciences has been offering a curriculum in Publicity and Imagology since 1995. The head of the department is Tiina Hiob (lecturer, MA). There are both Estonian and Russian groups and the number of students is about 200. Since the programme received conditional accreditation in 2004, it is possible that it will be restructured in the future.

3.5 Research funding

Science reforms implemented in the 1990s led to the integration of research institutes (formerly institutes of the Estonian Academy of Sciences, and institutes subordinated to various ministries) into universities. Today, the majority of research and development in Estonia is performed in universities. The largest public research university is the University of Tartu, followed by the Tallinn University of Technology, Tallinn University and the Estonian Agricultural University. There are also, however, several independent research institutes that perform research at a high level, for example the National Institute of Chemical Physics and Biophysics, and the Estonian Biocentre.

Policies on research and technology are developed by the Government and submitted to the Parliament for approval. The Government is advised in R&D issues by the Research and Development Council. The Estonian Ministry of Education and Research is responsible for the planning, coordination, execution and surveillance of research and education policies. The Ministry receives advice from the Research Policy Committee.

The Estonian Research Council is an advisory body to the Minister of Education and Research. Its responsibilities are:

- Making proposals concerning the initiation, amendment and termination of targeted financing for research topics at R&D institutions;
- Assessing the effectiveness of the targeted financing of R&D institutions and the conformity of the research results against international standards;



- Making proposals for the approval of the results of evaluation of R&D;
- Making proposals concerning the covering of infrastructure expenses of research and development institutions within the government of the Ministry of Education and Research.

Members of the Estonian Research Council are nominated for three years by the Government following the recommendation of the Minister of Education and Research. The Council is supported in its activities by nine expert groups composed of internationally recognised Estonian scientists, and the Administration Unit.

The Estonian Science Foundation (ETF), was established in July 1990 by the Estonian Government, as an expert research-funding organisation. Its main goal is to support the most promising research initiatives in all fields of basic and applied research. The EstSF uses state budget appropriations to award peer-reviewed research grants to individuals and research groups on a competitive basis.

The Estonian Academy of Sciences unites 60 top-level Estonian scientists and scholars (as of Spring 2005) and acts as an umbrella organisation for a number of associated learned societies, one research institute and the Estonian Academy Publishers. The primary mission of the Academy is to advance scientific research, provide high-level expertise and science policy advice, disseminate knowledge and promote scientific co-operation at national and international levels. The Academy represents Estonian science internationally, supports Estonian membership in international scientific unions, and funds and operates a scientific exchange programme with 23 partner organisations abroad.

The Ministry of Economic Affairs and Communications is responsible for the planning, coordination, execution and supervision of innovation policy. The Ministry is advised by the Innovation Policy Council and assisted by Enterprise Estonia.

Enterprise Estonia is one of the largest institutions within the national support system for entrepreneurship in Estonia, providing financing products, advice, partnership opportunities and training for entrepreneurs, research and development institutions and the public and third sectors.



Centres of Excellence

In 2002, the Centres of Excellence Programme was launched in Estonia. The first ten centres, covering a wide range of research disciplines (gene and environmental technologies, analytical spectrometry, non-linear studies, behavioural and health sciences, physics, chemistry and material sciences, molecular and clinical medicine, basic and applied ecology, dependable computing, cultural history and folklore) were selected on the basis of open competition and foreign assessment. Criteria for selection calls for a Centre of Excellence to consist of internationally recognised research groups working in close or complementary areas and performing research at a high level. A Centre of Excellence has to have a clearly defined common research goal and a positive impact on doctoral studies in its field of research. Research groups within a Centre must aim for synergy between different research disciplines.

Research and development financing

The instruments of the Estonian Research and development funding system are:

- Targeted financing;
- Baseline funding;
- Research grant funding;
- National research and development programmes;
- Funding of research and development infrastructures.

Targeted financing is decided by the Minister of Education and Research following a recommendation from the Estonian Research Council. The aim is to ensure a competitive basic structure for scientific research. Open to all fields and all research groups - both basic and applied research is funded. Evaluated and registered research institutions may also apply.

The Estonian Research Council organises the peer-reviewing of submitted applications and advises the Minister on opening funding for new research themes and the continuation of funding for previously-approved ones. The funding period for approved research topics is up to 6 years, subject to periodical assessment of progress. All of the research topics that have been approved for targeted financing are assessed each year.



Thirty-four new research topics with a total budget of 58.54 million Estonian Kroons (3,74 mil. EUR) were approved for targeted financing in 2007. The targeted financing of 180 research topics is continued with 241,2 million Kroons (21, 8 milj. EUR).

Baseline funding is a new instrument, introduced in 2005. The proportion of baseline funding in overall public financing will increase gradually. The purpose is to finance R&D institutions on the basis of research quality in order to support the development and initiation of research in R&D institutions. Also, it is aimed for co-financing cooperative projects, international and local, between academia and industry. There are no specific guidelines for spending, thus the institutions are responsible.

The Estonian Science Foundation (EstSF) awards research grants to individuals and research teams on a competitive basis. The purpose is primarily to support high-level initiative research, new ideas and studies. Project applications are evaluated by expert commissions and approved by the EstSF Council. In the year 2007 EstSF is financing 630 research projects - 144 new and 486 continuing. The overall sum of granting in 2007 is 101.6 million kroons. (6,493,406.89 EUR)

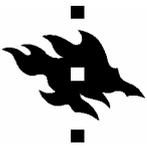
Table 8. Gross domestic expenditure on research and development 2004 (percentage of GDP)

Country	Percentage of GDP
Sweden	3,74
Finland	3,51
Estonia	0,91
Lithuania	0,76
Latvia	0,42

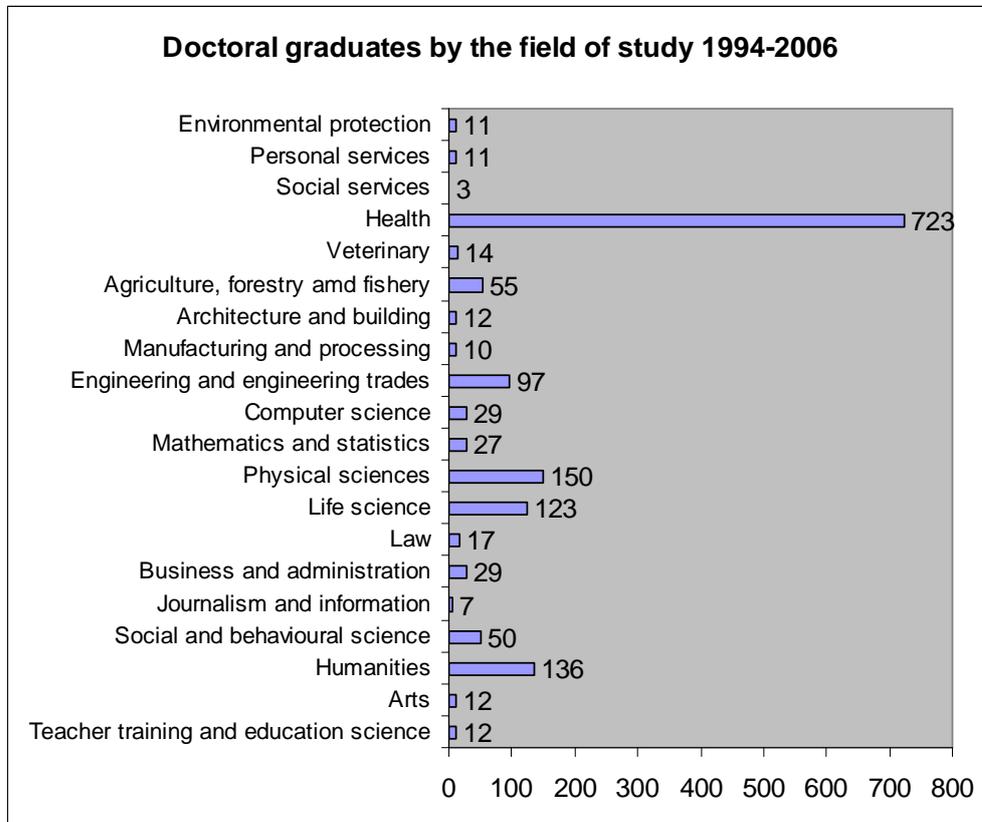
Source: New Cronos. Eurostat. 2.05.2006

Against international norms, Estonian investment in scientific research and development is still fairly modest. With Nordic countries aiming at 4 per cent of their respective GDPs, Estonia still has less than a single percentage share of GDP.

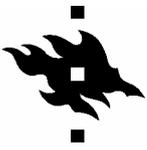
The trend of increasing investment in natural sciences and technology is notable in Estonia, with humanities and social sciences producing less than half the number doctoral graduates as technology, engineering and physical sciences.



Picture 7. Doctoral graduates by the field of study 1994-2006



However, a specific feature of the Estonian post-socialist academic landscape is the retention of strong academic institutions capable of producing vital doctorates in journalism and information in addition to doctorates in the field of health.



4 Estonian Communication and Media Research

4.1 Research Agencies and Companies

In Estonia there are four commercial research agencies that include the provision of media services in their business portfolios. TNS Emor has the largest market share of commissioned surveys in the field. However, ETV and newspapers also use other research agencies for tailored, one-off and more in-depth projects.

TNS Emor

Established in 1990, TNS Emor is the largest marketing research and consulting company in Estonia. Since the beginning of 2001 the company has belonged to the world's second largest research chain, TNS. Suomen Gallup is the majority share holder and Emor's annual turn over is approximately 5 mil. EUR. The Emor Team consists of five employees and there are five divisions within the company (brand marketing, marketing communications, media division, stakeholder management division and customer service solutions).

Emor has considerable experience in the field of media audience research and, in addition to modern data gathering methods, a systematic follow-up system and other quality control procedures are used to guarantee reliable survey results. Methodologically, Emor's database for the collection of audience survey material has remained largely unchanged since early 1992. TNS Emor's Baltic Regional Manager, Margo Veskimägi, remembers the situation in early 1990s:

"We were the first company in Estonia who introduced the word 'media' because before that everyone was talking about mass communication. Then everybody started to talk about media research. We are dedicated to media audience research providing currency for the market both programming, content side and as trading tool. All projects are carried out by our own risk, data is owned by the research company and we are providing reports or access to the databases to our clients."

This has also ensured the comparability of data over time. Changes in data collection have included the introduction of TV-meter studies in place of viewer's diaries, and a new focus on



web and on-line research. That said, Estonia was one of the last countries to move away from viewer/listener diaries in media use studies: replacing them with TV-meter studies in 2003.

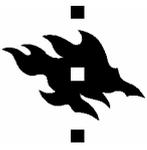
According to Veskimägi, traditional survey methods of face-to-face and telephone interviews are still used in Estonia. As the response rate to traditional surveys has remained consistent, there has not been the same impetus to adopt online solutions as in Western countries. TNS Emor can apply the CAPI method and their network includes 70 CAPI interviewers. Indeed, TNS can utilise this method in all three Baltic States and conducts both surveys on a bi-monthly basis.

“Biggest changes in business are of course in the internet side, internet research is changing. We had our first survey on internet use in 1996. Then the biggest question was how people would differentiate computer from calculator (*arvuti* means both calculator and personal computer in Estonian) and we had put an explanation what we meant by *arvuti*. Also what is a notebook, issues like that were relevant then (laughing). Ten years is a long time in internet use surveys.”

The huge amount of data amassed through various kinds of media surveys allows clients to solve their own survey needs. According to Veskimägi, during recent years Emor has trained a couple of hundred people from media houses in the use of their audience survey database. This is in line with their aim to teach media house staff how to identify their particular information requirements and then conduct their own analysis from existing data.

TURU-UURINGUTE AS

Turu-Uuringute AS was the second most quoted commercial research agency during interviews with media house staff. It is an independent research company that has been operating in the Estonian market since 1994 and is owned by the Finnish research company Taloustutkimus OY. In the Baltic States, Turu-uuringute AS' main partners are its sister companies Latvian Facts in Latvia and Vilmore in Lithuania, with whom it frequently conducts collaborative marketing and opinion polls.



TU AS also offers a service in the field of public opinion and marketing research: most especially public opinion surveys on issues such as political parties, EU, NATO and acute social issues, and barometers measuring satisfaction on various public and private institutions. Turu-Uuringute AS has 19 full-time employees (with 5 in the Research Department and 14 in the Data Processing Department). The Company has over 140 interviewers in Estonia, of whom 12 are specialised in telephone surveys.

In addition to working for media houses, public opinion surveys have been commissioned by various public sector organisations (ministries, state authorities, political parties, local governments, public law agencies, etc.), media channels and others.

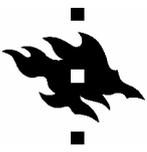
OÜ Faktum & Ariko

OÜ Faktum & Ariko was established in 2006 as a result of a merger of two research companies: Ariko MG and Uuringukeskus Faktum. It is based on local capital and provides its clients with a range of services in marketing and social surveys. Ariko MG was established in January 1993 and had a reputation for being one of the main marketing researcher companies. Uuringukeskus Faktum was established in 2002 by specialists mainly known for high quality public opinion and social research. In total, the Company has 12 employees.

Saar Poll Ltd

Saar-Poll is the third largest full service marketing research company in Estonia; providing data from the Baltic States, Ukraine and Russia. Saar Poll was founded in 1988 (before 1991 AIK). At the moment the company has more than 200 interviewers nation-wide, with partner-firms in, Latvia, Lithuania, Ukraine and Russia.

Saar-Poll co-operates with other market research companies such as Gallup Hungary, Gallup Worldwide, Pentor, Research International, NFO, Roper Center and with many universities research departments (California University at Santa Barbara, Berkeley and Davis, Kent University, Michigan University, Oslo University, Oxford University etc).



Its activities are divided between: product development research; advertising and communication research /advertising campaigns and PR research); media research (audience measurement and content analysis; trade research; brand research; and, public opinion research (what people think about economic-political situation, state institution ratings and political polls).

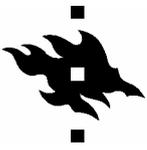
4.2 Media Companies

Media and communication research conducted by in-house research units is understandably more practical, closely focused on market share analysis and orientated to receiving information on audience survey data than work conducted by the commercial companies. All the media house experts interviewed admitted to using the basic audience surveys and market share surveys provided by EMOR and some smaller companies. However, in some cases research activity is slowly evolving from pure audience survey analysis and monitoring towards more in-depth studies, especially when resources are concentrated in the in-house units.

Research Centre of Estonian Television and Radio

Estonian Television (*Eesti Televisioon, ETV*) started its own research unit this Spring after it had been closed for 16 years. Estonian Television and Radio Research Centre has a long history going back to early the 1970s. According to Vihalemm (2006: 81), a small sociological research group started in *Eesti Raadio* (ER) as early as 1969, and a year later at ETV. During the 1970s these groups conducted quarterly panel surveys of audiences using viewing and listening diaries as their main source of information. In addition to monitoring media use, the Research Group started to examine the interests and expectations, including the construction of empirical typology, of viewers and listeners. By the late 1970s and early 1980s the content of programming was also one of their main interests.

However, during the time of Soviet occupation, control over media and sociological research by the Communist Regime was part of everyday life of the researchers. The Research Group of



Estonian Radio and Television belonged to the third level of control.⁶ It meant that researchers had access to news broadcast research and even the audience of Finnish TV, in addition to some other sources such as Voice of America and Radio Free Europe. However, audience research was itself semi-secret and restricted to official use of radio and television authorities. Professor Hagi Shein remembers the early decades of the research unit:

“In 1960s and 70s a lot of research was done in ETV and radio – unit was huge. In the 1960s and 70s it was the centre of resistance to Soviet ideology but later on they started to research how to support the same ideology. (laughing). Lot of research of youth audiences was done in order to reveal the values and aspirations. It was agony of the Soviet time, in order to save this system they had to try to affect on young people somehow.”

During Autumn 2006 ETV re-launched its research centre and Raivo Suni, journalist and new media specialist who is also a PhD student of University of Tartu, won a competition to be the new head of the unit. At the moment there are two full-time employees in the unit: the director Raivo Suni and analyst Liina Raudik. By the end of the year the number of staff should be increased by an additional two employees. The research network is larger with some 10 to 15 researchers employed as sub-contractors by the Centre.

The mission of the Research Unit is fairly similar to that of the Unit of the Finnish Broadcasting Company YLE: to analyse programmes, to analyse different sub-groups and their needs within the larger audience, and assess people's expectations and opinions on programming in order to help the programme makers develop higher quality products. The Research Centre will be home to the database where all the studies concerning Estonian audiovisual studies will be collected.

The budget of the Research Centre comes from ETV and ER funding but compared to other European PBS companies where the research investment is often approximately one per cent from the budget, in Estonia, the ETV's Research Centre is still at under 0.5 per cent of the overall budget.

⁶ According to Vihalemm (2006: 81-82) the first level of control was exercised over the production of highly canonized texts: Newspaper Pravda, all Russian language party press (in Estonia Sovetskaya Estonia). The main source of this information was the news agency TASS. The second level of control comprised the Communist Party Press in the national languages, news broadcasts in the electronic media and political, economic and historical themes in local coverage.



These financial constraints are circumvented by collaborating closely with universities. The Research Centre will be in close co-operation with the University of Tartu and possibly other smaller research units within Tallinn area. According to Raivo Suni the staff of the Research Centre will offer topics and material to students for analysis, as well as to supervise their dissertations. Suni describes the tasks of research centre:

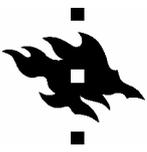
“One important mission in our work is to try to develop quality standards for the programming. The traditional thinking pattern was that the bigger audience the better programme. It is not exactly so straightforward. We want to bring also other criteria, more substance and content –oriented and start to think what programmes are better and what are poorer.”

According to Suni, the Research Centre will change how a lot of people within the Company understand the role of research. At present the only ‘research’ that has been ordered has been basic studies: large audience and media use surveys. Now research should focus on answering more practical questions. Suni explained the change in thinking: “Now when management or journalists notice a problem, they come to us and ask for a solution. We try to design a study in order to solve this specific problem. This didn’t take place earlier.” In broader terms PBS Company research aims are connected to the larger social frame:

“It is important to study how media helps people make sense of the world. We don’t have enough that study. Therefore the quality of programmes and studying the content should be focused more.”

Eesti Päevaleht

Eesti Päevaleht is a good example of a nationally owned newspaper that frequently uses academic research in addition to the main audience and market surveys provided by commercial companies. The newspaper’s main interest naturally lies in the newspaper market and its development, but also the values and new tendencies within larger social and political landscape



are followed closely. As Managing Director, Aavo Kokk condenses the interest of the management:

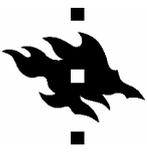
“We have studied the values of the people, and tried understand what is going on in the society. We don’t focus too much on media consumption, it is so much studied world-wide that if something is happening in Finland, Germany or States, it is definitely going to happen here. That’s why we are trying to study society and differences, what is the difference between Finnish and Estonian society, are we late-comers or early-comers in our market.”

Pävaleht has an unofficial research unit. In every section (editorial room, marketing, and management) there is one or two employees who are responsible for research activity. Every week a small-scale telephone survey is conducted amongst subscribers in order to know what they have been reading and how they would assess different sections (culture, sports, domestic news, foreign news etc.) of the newspaper.

“We call every day to our subscribers and ask about 20 questions mainly about the articles – did you read the article? It is very simple split between women and men and of course regional split –we are interested in Tallinn area, we aren’t so much interested in other areas. During one month we receive fairly good feed-back how business news are received, how culture is received etc. That is going back to journalists every day; this is to keep them alert every day and not so much because of the research itself.”

In addition to in-house research activities and monitoring the markets through the EMOR database, the newspaper uses academic research, organizes seminars and frequently relies on personal consultation with academics. Aavo Kokk describes:

“We as a media house have our own interests and the academic side has their interest. Often we have seminars together and we discuss about common interest and the results of earlier projects and really try to figure out what these results mean in the everyday work of our journalists and marketing people. These seminars are open to everyone here and they are very popular among journalists, marketing people and the management. They discuss with Marju Lauristin and Peeter Vihalemm (Professors of Media and communication from the



University of Tartu) and then perhaps suggest couple of new questions for the future research and scholars are also affected by the discussion of the seminar. This is creative and inter-actional way of collaborate where everyone benefits.”

However, the impact of technology on the newspaper market has adapted the media’s research interests:

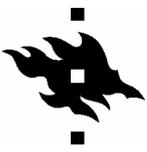
“But the new wave is coming from the online where things are different, in online you have direct to your customers and the research is changing. Classical research is about questions, analyzing them and conclusion. In online you do the immediate change and if it works you implement it. It is very much based on focus group ideology and it is interest in the fundamental things of society because it costs. You just test and if it works you implement it.”

On-line readers are also closely monitored. EMOR frequently measures visits to web-pages and gives immediate feed-back to the newspaper. In a commercial company’s readership surveys, print and online readership are given as separate numbers and shares, so the tendency to see how online-use develops is easy to follow. It is also easy to conduct small in-house comparative studies on web-pages across the market.

“We also monitor the patterns of readers seeing what readers are interested in, everybody is fighting to get more readers. If I compare Estonian newspaper market to any other market, it is absolutely crazy, web-pages are changed every week – the consumers start to expect it. We have done few things – asking in the forms of the seminars – how the eyes of the readers is going when they are reading online – find out what are the hot spots. Numbers are almost the same – online and print”

Commercial TV Channels

The tiny in-house research units of the commercial channels mainly consist of one or two employees; concentrating on audience survey data received from commercial pollsters like TNS



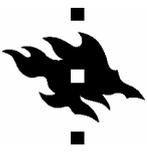
Emor, Saar Poll or Turu-uuringute AS. In some cases, small-scale qualitative in-house studies are conducted (for example, telephone interviews etc.) by the research staff. As Toomas Tombu, the director of the research unit of commercial AS TV 3 summarised the situation.

“We are using subcontractors for doing our research. Our largest project is the audience survey, for which 300 families in Estonia (1000 in Finland) are measured in one panel. It is the largest expenditure in the research budget and we spend 7-digit numbers for that every year. As a result we are able to see the TV watching habits of 600 people, minute by minute, as a microscopic model of Estonia. Every night the data is collected from their TVs to TNS Emor, then sent to Denmark, and later we shall see them in a unified file here. It is an international and standardized procedure.” (Toomas Tombu, Director of the research unit, AS TV 3)

Research activity by another commercial television channel is quite similar and TV2 uses a brand survey of all those TV channels that are considered to be important. The priority is to analyse programme appeal to target audience groups in order to then attract advertising revenue:

“We have been using the services of Turu-uuringute AS twice a year: it’s the brand survey of all TV channels, same questions are asked every year: general evaluation and what affects the reputation and image – which elements have a positive or negative effect; program categories and elements of image are presented (entertainment, objectivity, good TV personalities etc). This survey has a long history and a well-trying format, that everybody is familiar with. Perhaps we could subcontract some other research, but it is not really necessary: the people meter already provides so much precise data to be analysed, that we don’t really need more and have no time for more.” (Margus Paas, Director of the research unit of Kanal 2)

Often research activity and need for research in general depends on the niche a certain channel tries to take within the market. As Toomas Tombu at AS TV3 explains the dilemma of the commercial TV channel in Estonian market:



“The problem with TV3 is that we are a commercial channel of entertainment, but we have such serious 7-o’clock news. The studies reveal that about 60% of the people with higher education watch ETV, 25% TV3 and 15% Kanal2. So we do not really have the target group that our news are aimed at, we do not have other programmes to go with the news and keep them longer on the channel. The share of people with higher education is in general only about 10 to 15% among the viewers of TV, it is too low to target any programmes to them in particular. TV companies mainly sell numbers of viewers, nothing else. The advertising is for products that everyone consumes regardless of what they think. TV is in essence a mass communication and especially in Estonia it would be a suicide to try to make niche products here.”

4.3 Academic Research Projects

Although the transition period of the early 1990s effected the funding of media and journalism research, the current state of media research in Estonia is fairly healthy. The main characteristic of Estonian media studies when compared to other countries (for example Finland, other Nordic countries and the UK) is that research is organically linked to the transition of society. Impulses are mostly external, from society, and its focus is on the search for solutions to current problems within that society. Knowledge-production is linked to the larger social framework and is, therefore, also closely connected to the problems of changing systems, the media system being just one of them.

In terms of funded research projects, Estonian academic media and communication research has an amazingly large and diverse number of different projects; varying thematically and in size.

Only a small portion of current research is supported through a university’s basic funding. Most of the academic research is funded by the state through two different types of funding instrument. Targeted funding is based on competition in which different projects applications are screened and the most relevant, according to academic assessment criteria, are funded. Funding is also granted by the Estonian Science Foundation to individual scholars. That funding is often used to cover research expenses whilst the research itself is done as part of the daily work at the university.



Table 9 (below) illustrates those projects based on *targeted financing* and these are traditionally considered to be academically the most important. They are usually financed for a minimum of 5 years and they effectively create temporary research posts; supporting the creation of larger research groups, strengthening research training and education; and often bringing along new doctorates.

The projects financed by the Science Foundation (Table 10) are projects where the funding is more supplementary and does not cover the whole salary of researchers.

Table 9. Research projects: Targeted Financing 2001-2012

Title	Period	Leader	Funding for last year (EUR)
Actual complexity of cultural communication and methodological challenges of cultural research	2007 to 2012	Epp Lauk, UT	47,900
Estonia as an Emerging Information and Consumer Society: Social Sustainability and Quality of Life	2007 to 2012	Peeter Vihalem, UT	55,900
Formation of the 21st Century Media Society in Estonia	2001 to 2005	Marju Lauristin, UT	42,600
Meaning-generation and transdisciplinary methodology of semiotic analysis of culture	2006 to 2011	Peeter Torop, UT	66,300
Consolidation of democracy in multicultural society	2006 to 2011	Raivo Vetik, TLU	56,300
The second wave of cultural changes in re-independent Estonia	2007 to 2012	Aili Aarelaid-Tart, TLU	86,400
The analysis, modelling and control of the development of the Estonian linguistic environment	2003 to 2007	Martin Ehala, TLU	36,600



Table 10. Research funding by Estonian Science Foundation 2004-2010

Title	Period	Leader	Funding for last year (EUR)
Formation of 'public' in Estonia and construction of 'public' in Estonian media 1954 – 2004	2004 to 2007	Maarja Lõhmus, UT	6,110
The Role of the Media in Social and Political Integration of Transnationalising Society	2005 to 2008	Peeter Vihalem, UT	11,500
Social and Cultural Practices of the Emerging Information Society in Estonia	2004 to 2007	Marju Lauristin, UT	9,200
Changing Collective Identities in the Context of Estonian Movement into the Global Space	2004 to 2007	Triin Vihalem, UT	9,900
Children and young people in the emerging information and consumer society	2007 to 2010	Veronika Kalmus; UT	13,400
Problems of Transformation and Representation and Reception of Cultural Heritage in the Digital Age	2007 to 2010	Marin Laak, Literary Museum	9,800
Forming and changing of Estonian national identity from the 19th to 21st century. The influence of identity mechanisms to the cultural processes	2004 to 2006	Madis Arukask, UT	6,900
Internet. Processes of construction, reproduction and transformation of narratives, values and identities	2006 to 2009	Mare Kõiva, Literary Museum	4,600
A semiotic approach for explanation of public opinion on the EU integration	2005 to 2006	Raivo Vetik, TLU	7,700
The problem of media-determinism and temporal-spatial relations of the work of art	2004 to 2006	Virve Sarapik, Literary Museum	5,600
The Role of Estonian- and Foreign Language Printed Matter in the Raising and Formation of National Consciousness and Consolidation of Nation: Publication, Dissemination, and Reading from the Beginning of the XIX	2007 to 2008	Vello Paatsi, Literary Museum	8,400



Century to the Creation of the Estonia			
Scripts of Modernity: A Comparative Analysis of the Social and Cultural Aspects of Late Modernisation	2007 to 2009	Rein Raud, TLU	6,900

Table 11. Other projects 2005-2008

Title	Period	Leader	Funding for last year (EUR)
TEL-ME-MOR: The European Library: Modular Extensions for Mediating Online Resources (6th Framework Programme)	2005 to 2007	Toomas Schvak, National Library	
AIM: Adequate Information Management in Europe (6 th Framework Programme)	2005 to 2007	Marju Lauristin TU	
DoD: Digitisation on Demand (eTen programme)	2006 to 2008	Krista Kiisa, National Library	

Despite scarce resources for funding social sciences, and especially communication and media research, the number of research projects is considerable. University of Tartu has generated four large research projects and, in addition to that, individual grants have been awarded to five scholars. University of Tartu is also part of the consortium of Adequate Information Management (AIM): a European project funded by the 6th Framework.

4.4 Publications on Media and Communication Research

The selection of publications is based on the database of the Estonian Research Information System (ETIS) (<https://www.etis.ee>) which presents information on research and development institutions, researchers, research projects, and various research results. The Estonian Research Information System is also an information channel for submitting and processing grant applications and for submitting and confirming project reports. All public universities are using the database as their research evaluation tool, which is obligatory to all members of staff involved in research. This assures that the data is systematically revised and kept up-to-date.



Publications have been selected by authors, including the full time staff from departments involved in media and communications studies as well as researchers of related projects (both target financed and Science Foundation projects). Publications are listed as monographs, articles and specific chapters in collections. Every publication is categorized under one of the following codes: 1) Media structures and economy; 2) Theories, media and communication; 3) Media education; 4) Organisational communication and media management; 5) Media technology and new media; 6) Audience, reception and media use research; 7) Media culture and popular culture; 8) Social and political communication study; 9) Media, language and ethnicity; 10) Media semiotics; 11) Media history; 12) Language and communication; and, 13) Post-Socialist society and Europeanisation.⁷ There are 359 coded publications with the following division by university: Tallinn – 144, and Tartu – 215.

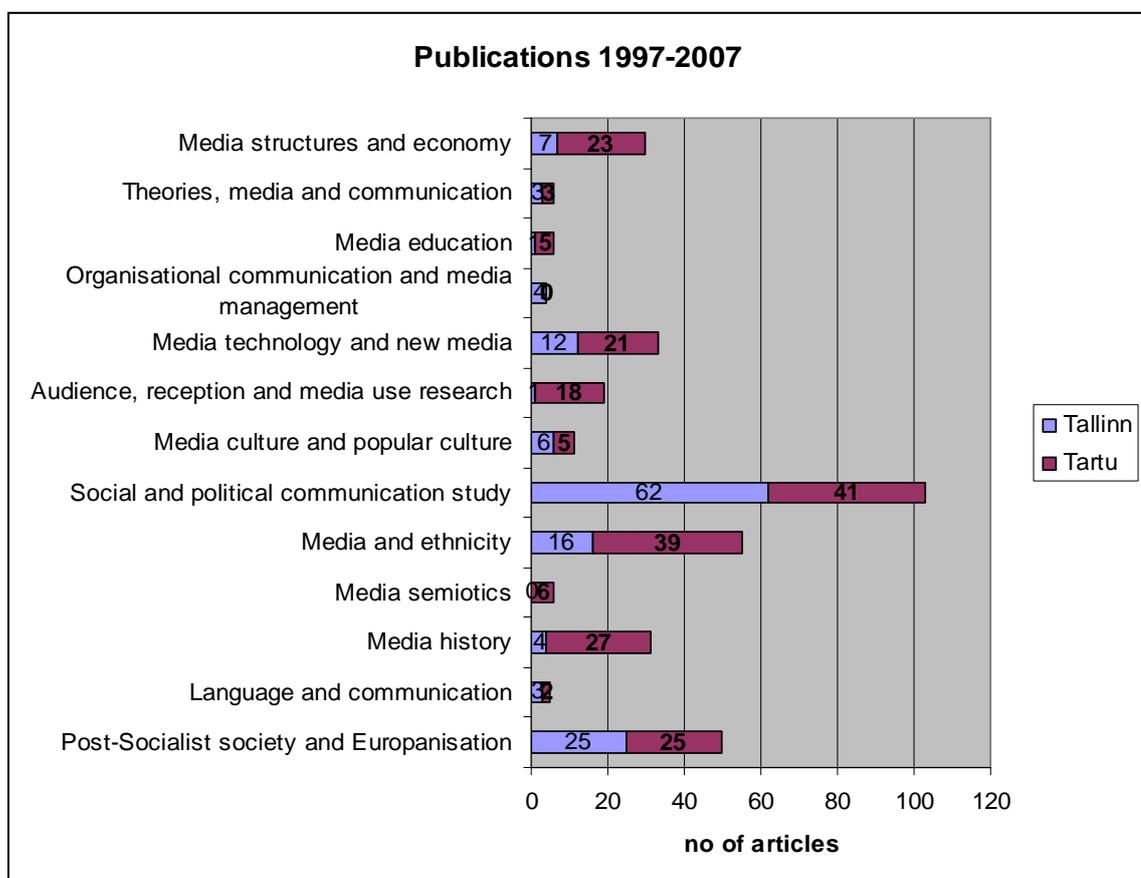
According to an assesment of ETIS, University of Tartu produces the bulk of traditional communication and mass media publications in the field.. Tallinn University is more specilised in related fields: linguistic structures of Estonian society; library studies; and, social and political strategic communication between different language groups within the society.

The most highly rated object for research has been social and political communication. The impotance of this subject is undoubtedly the result of the social and political transformation Estonia went through during the 1990s. The broad category of social and political communication includes a wide range of studies on identity of construction, public opinion, values and attitudes of Estonians, policy studies and intercultural communication that have not always had traditional mass media as their key focus.

⁷ Many of the titles (see Appendix 1) don't refer to media or mass communication in a straightforward manner. This is because Estonian communication research tradition is closely linked to social and political sphere where media, communication and oral histories are part of the larger socio-political framework in identity construction or ethnic consolidation. Consequently a simple keywords seacrh based on "media, journalism or popular culture" would have left the majority of published titles outside the list. Also, some scholars who sepcialise in the field of organisational communication and audiovisual work outside Estonia at the moment and are not included ETIS – therefore their publications are missing. The publications of Baltic Film and Media Schoold have not been listed in ETIS nor their homepages.

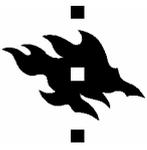
Media, language and ethnicity have been the second most highly rated topic with regards to published works. The integration of Russian-speaking population and Estonia's inter-ethnic tensions have been both under the scope of European Union officials as well as on the agenda of Estonian policy-makers which explain the visibility of minority studies in Estonian communication and media research.

Picture 8. Publications on Media and Communication studies 1997-2007



Source: Estonian Research Portal, [www. etis.ee](http://www.etis.ee)

The third most popular area of research has been 'Post-socialist society and Europeanisation.' The content of this category includes 'transitology studies,' memory studies and studies linked to European Union, cultural change, i.e. 'Europeanisation' and studies on (European) identity politics.



In Estonian communication and media studies there are traditions that have equivalents in Nordic and other European countries such as audience, reception and media use studies, journalism studies, popular culture, and new media and ICT. However, this thematic categorization shows clearly that Estonian communication and media research is driven more by social and political concerns than generic divisions internal to media and communication studies. Some topics that are hugely popular objects of study in Finland or other Nordic countries (popular culture, studies on media representations, organisational communication or feminist media studies) were very modestly represented in this sample.

Many topics are, however, dealt with in the students' MA dissertations and these, generally, remain unpublished. 'New' subjects connected to media and new consumerism, representations of gender in news and magazines, internal communication of public sector institutions, constructing national identity in media, Europeanisation through EU's information network, comparing and analysing EU news coverage and ethnic 'niche' media etc. demarcate the interests of change amongst the generation of young scholars.



5 Main approaches of the Media and Communication Research

“The difference in our research is that our studies are not media studies but sociological studies and media is one factor in society. Or then we can look at the societal factors that are affecting media consumption. It is interesting also for journalists when we give them the context: set of values and life –world.”

Professor Marju Lauristin

The specific nature of Estonian media studies derives from the sociological and historically contextualised perspective of a transitional society. Media is analysed as part of society and not as a separate entity. The rapidly changing society creates new problems to which the academic community must respond. Therefore, the common claim that academia has withdrawn to an ivory tower does not apply to Estonian media and communication research.

Estonian media and communication research is largely empirical by nature but also often elaborates on that approach with theoretical and historical analysis. The quantitative research tradition has been strong, especially at the University of Tartu. Traditional sociological methods are often in use: content analysis; surveys and questionnaires; experimental research; theme and focus group interviews; and, participant observation. Qualitative methods have started to enter general use amongst the younger research generation. Most popular are different methods of textual analysis deriving either from critical discourse analysis or more semiotically oriented analysis.

It is important to understand that Estonian researchers haven't implemented their research agendas simply by following and imitating Anglo-Saxon or Nordic influences but have instead developed original communication models, study designs and methodological solutions. Theoretically Estonian scholars have also had their own trajectory. For instance, when during the 1980s the Western world embraced the Marxist oriented cultural analysis in the media studies; naturally that tendency wasn't á la mode in Estonia. Instead Habermasian critical and normative tradition gained a strong foothold in social sciences early on. This critical and normative approach was fused with American pragmatism and the classical MCR –tradition. The



Habermasian tradition (with its local adjustments) is still very strong in the Estonian media and communication studies in addition to analysis of large empirical data. Also French theorists Pierre Bourdieu and post-structuralists like Michel Foucault are often used with semioticians such as Juri Lotman.

These political and historical experiences give researchers a unique access to the understanding of conditions of totalitarian societies. This has created interesting projects in the interdisciplinary endeavours such as memory studies, 'Europeanization' and globalization studies. With ethnic Russians comprising almost one third of the population, Estonian scholars have a great opportunity to study ethnic diaspora and its media use as part of identity and linguistic politics. Estonian communication and media research has traditionally had a strong tradition of semiotics, and this is reflected in media studies.⁸

In the following chapter, the focus is on the main tendencies of current and traditional media and communication research. In addition to aforementioned theoretical openings, many new evolving tendencies have been left outside this scope. In order to facilitate comparability with other country reports linguistic, folkloristic, semiotic and interdisciplinary approaches of political sciences where the communication is part of the larger frame of the study are left outside this account.

5.1 Media sociology: Audience Research and Media Reception

The mostly closely examined area of Estonian mass communication research has traditionally been the media audience: its structures and media use. Audience surveys were started as early as 1965, when television and radio audiences were regularly monitored. Of course the requirements of the controlling occupying Soviet regime were the over-riding factor in this: television was

⁸ Estonian semiotics is closely connected to the University of Tartu. Tartu is the birth place of the semiotics of culture (Juri Lotman and Tartu-Moscow School of Semiotics) and biosemiotics (Jakob von Uexküll). Contemporary Tartu semiotics is further developing its traditional orientations of inquiry, but it also deals with reconciling and combining ideas from different semiotic traditions without losing its successful *genius Loci*. In media studies researcher Maarja Lõhmus has been particularly active in developing semiotic approaches to media studies.



seen to have a larger influence on people's minds thus the audience of print media was examined to lesser degree. During the 1970s and 1980s, content analyses of print and audiovisual media were conducted regularly. In the late 1970s and in 1980s, models of uses and gratifications were implemented in various audience surveys. During the 1990s researchers started to use professionally collected audience data provided by research companies such as EMOR. In academic research, audience data was analysed in depth and different audience typologies constructed. (Vihalemm 2006: 85-86)

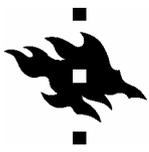
The former student of the University of Tartu, Aavo Kokk (the managing director of Eesti Päevaleht), remembers the founding study of the tradition that impressed him when a student at the University of Tartu:

“In Estonia ever, the most important research has been done in the 60s and this project was done in many places in Soviet Union, it was so called *Taganrog Study*.

Taganrog was the birthplace of *Anton Chechov*. They decided to study all communication channels in a middle-sized Soviet industrialised city and they did it for years looking at the role of mass media, the gossip, the social interaction, you name it. Then they modelled it. The name of the study as “*The Communication in the Middle-sized Soviet City*”.

The group that was studying the communication aspect, they were much influenced by for example Marshall McLuhan and Jürgen Habermas. Luckily Marju Lauristin and Peeter Vihalemm were part of this research and that meant that they started to study the readership of Estonian newspapers in-depth and closely related to structure of the society. Newspaper Postimees (Edasi at that time) was the research base of this study. They did many interesting things, they printed many different kinds of papers, looked with the focus groups how people read the newspapers. That was the biggest thing that has been done in the Estonian media research.”

It should be kept in mind that the Department of Journalism and Communication, and journalism education had a critical role before the 1989, making the university as “the centre of critical and free thinking” as one Estonian journalist and former student condensed the role of her *alma mater*. Therefore, not only scholars but also journalists working today in the field were



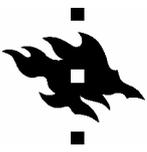
strongly affected by the ideas of free speech, vital civil society and the importance of understanding the values and aspirations of the people.

This tradition was strengthened by the books published during the 1990s: "*Return to the Western World: Cultural and Political Perspectives on the Estonian Post-Communist Transition*" (1997) (eds. Lauristin, M. & Vihalemm, P. with Rosengren, K. & Weibull, L.) sekä "*Towards a Civic Society. The Baltic Media's long Road to Freedom*" (1993) (eds. Høyer, S. Lauk, E. ja Vihalemm, P.). These books were written in collaboration with Nordic scholars, brought Estonian (and other Baltic countries) media system to the public eye, and modified the Western academic community's understanding of the media systems of the former Eastern European countries. In truth, Estonian scholars were pioneers in "*media transitiology*" studies.

Recent books written on the Estonian media landscape originate from the research project: "*Formation of the 21st Century Media Society in Estonia.*" This project ended in 2005 and has resulted in several books; as well as being given considerable public visibility within society. In interview, Haji Shein stated that the main report of the project "*Mina.Maailm. Meedia*" (Me, Media, World) can be found "in every library and editorial room of the country."

5.2 Journalism Studies, Professional Cultures and Media Systems

Media and Journalism History. Another very strong current in Estonian research tradition examines the Country's changing professional cultures and generational replacement of journalists. This has been of particular interest at the Department of Journalism and Communication at the University of Tartu. Alongside her research group, Professor Epp Lauk has documented the history of Estonian journalism between 1900-1940 in two major works on the Estonian history of Journalism: "*The Main Chapter of the History of Estonian Journalism 1900-1940 (Peatükke Eesti ajakirjanduse ajaloost 1900-1940)*" (eds. Epp Lauk, Marek Mälk and Anu Pallas, 2000); and, "*Our traces will remain. Biographies of Estonian Journalists I*" (ed. Anu Pallas, 2004) (*Meie jäljed jäävad. Eesti ajakirjanike elulood I*).

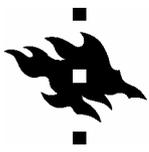


Professor Hagi Shein's book on the history of Estonian Television 1955- 2005 (*Suur teleraamat 50 aastat televisiooni Eestis 1955-2005*) has been another significant contribution to the field of media history.

In general, Estonian journalism studies focuses both on the latest changes in journalists' working practices as well as their professional heritage. The most recent research project on journalism is on EU Journalism and is connected to the EU 6th Framework Programme's "*Adequate Information Management in Europe*" media project. The overall objective of this project is to investigate the mass media's impact on the evolution of (a) European public sphere(s) in empirical, theoretical and practical dimensions and is based on the concept of news management. News management, in this respect, is not only understood in the traditional sense as a unidirectional PR strategy: rather, researchers try to focus on news management and enlarge the management and production processes of journalists and the mass media.

The four main goals of the project are: Research into journalistic work procedures and routines in the field of European journalism; Research into journalistic work procedures and routines in the field of European journalism; Analysis of national journalism cultures determining these mechanisms to re-think and re-define professional standards from a comparative European perspective; Investigation of EU communication and information policies. The consortium is headed by Dr. Gerd Kopper from the University of Dortmund (Germany), comprises of eleven European Universities including Finland (University of Tampere). The Estonian leader of the project is Marju Lauristin.

Professor Epp Lauk and Associate Professor Halliki Harro-Loit are part of the A30 COST Action '*East of West: Setting a New Central and Eastern European Media Research Agenda*'. The project provides administrative support for 4 years and brings together more than 40 scholars from 20 European countries. The Action is engaged in research concerning media production, media reception and use, and the political implications of the transformation of the media in the Eastern and Central European context. Action participants work on empirically based frameworks of analysis for specific media problems facing the region. The Action is also in the process of developing a European social science research network with a focus on emerging problems of Central and Eastern European media in a comparative perspective. This



genuine collaborative effort among Western, Central, and Eastern European researchers builds on already existing international networks of researchers from all involved regions and well established patterns of knowledge transfer to New Democracies in the region.

Development of the media system and media markets. Development of the Estonian media market provides an exemplary case of extreme liberalisation and the subsequent domination by a few foreign companies in the media market. At the same time the speed of computerisation and Internet access in Estonian society, especially among the young generation, is one of the fastest in post-Socialist countries. As a result, processes of rapid fragmentation and social divergence among the audience into “information poor” and “information rich” have accelerated during the last decade according Peeter Vihalemm (2006: 90).

This particular tendency has been researched as part of the European COST research network A20. Thus Professor Epp Lauk and Associate Professor Halliki Harro-Loit are part of the COST Action A20: *The impact of the Internet on the Mass Media in Europe*. The main objective of the Action is to develop knowledge in order to understand the various changes that mass media industries are undergoing now, and will in the future undergo, as a result of the development of the Internet.

Baltic media markets have been researched as part of the joint book project where Associate Professor Halliki Harro-Loit has compared Baltic countries and Norway from a structural and economic point of view. The book of this joint project: *Baltic Media World* (2005) (ed. Richard Baerueg) is a publication that compares Baltic and Nordic countries and the development of media markets in these countries. Special attention is devoted to accountability systems and media ethics, hidden advertising, systems of media control and state intervention, media ownership, editorial censorship and the professionalisation of journalism, cultural stereotypes, internet debates as well as media modernisation and journalism cultures.

Cultural studies dealing with consumer society, consumerism and media are still rare in the Estonian research tradition. However, the ethnographic tendency has started to evolve. Margit Keller's (2004) Doctoral dissertation *“Representations of Consumer Culture in Post-Soviet Estonia: Transformations and Tensions.”* deals with the socio-cultural transformation and the development of



Western consumer culture in Post-Soviet Estonia and serves as a good example of this new tradition.

5.3 Media, Ethnicity and Identities

The role of the media and integration of minorities into society. Ethnic issues are at the forefront of international interest concerning developments in Baltic States. In this context the role of the media is being assessed in constructing national identities and in creating a common public sphere for different ethnic communities. Media monitoring and ethnographic methods have been in the core of this approach. The main publication on the issue has been "*The Challenge of the Russian Minority: Emerging multicultural democracy in Estonia*" (2002) (eds. Marju Lauristin & Mati Heidmets) and it has demarcated the path for the minority studies tradition in Estonia. The objective of the research team was to create a sociological perspective for understanding complicated inter-ethnic processes taking place in Estonian society after its restoration as an independent nation-state in 1991.

Many of ethnic minority researchers have had a unique opportunity to participate via this research: not only towards academic endeavour, but also in the process of policy formation. Valeria Jakobson's 2002 Doctoral dissertation (*Role of the Estonian Russian-language Media in the Integration of the Russian-speaking Minority into Estonian Society*) examined the role of the Russian-language media in Estonia, its influence on the integration of the Russian-speaking minority into Estonian society, its participation in identity building, and, its stance towards the restored Estonian state with its institutions and Estonian ethnic majority. The research was motivated by a desire to provide scholars of identity and nationalism with an inside view of the minority community in addition to an external perspective. This presents a contrast to the traditional vision of Estonian researchers of the Russian-language media as a mere 'extension of Russian Federation propaganda' or as a homogeneous, intentionally separatist and isolationist entity.

The main results of the dissertation were that the place and role of ethnic minorities in society was not defined until 1998, the press did not construct clear political identities for the Russian-speakers in the 1990s, but rather reflected various spontaneous identities emerging in the community. The result of such functioning was not the construction of a coherent of the



Russian-speaking community, but rather its fragmentation. As a result, the Russian-language press played the role of trader-mediator between the aforementioned groups, trying to 'buy' the voices and loyalties of the audience.

A good example of the beneficial entanglement of academic research and policy-making that has positively effected the integration of Russian ethnic minority is offered by the scholarly activity of Dr. Triin Vihalemm. From 1995 until 1999 she was involved in an inter-institutional research and development program 'Integration of non-Estonian youth into Estonian Society' (1995-1999). This minority research continued through 1998-2000 as a target financed programme "The role of education in the integration of non-Estonian youth into Estonian society" (TSOAH 0544). Both projects had a significant input to the Estonian State Integration Programme 2000-2007. Vihalemm also participated in the creation of the State Programme Integration in Estonian Society 2000-2007, a sub-programme societal competence and she produced a chapter "Mass media" in the Report of Estonian Government Integration in Estonia 1997-2000. She has acted as a consultant in workout of the communication programme of Phare Estonian Language Teaching Programme and Media Campaigns of Integration Foundation (2002-2003), and Support to the State Integration Programme by Estonian Government/UNDP/Nordic Project (1998-1999). Currently, she is collaborating in the development of the new State integration Programme 2008-2013 from the department of Media and Communication.

Communication, identity and nation building. Development in political culture and changes in political discourse have been focused on both in Tallinn and Tartu. Problems of political domination and legitimacy have been of great importance in the Estonian society during the last fifteen years. Changes in public political discourse have revealed a shift from the initial "mythological" form to "ideological" and critical-rational argumentation. Identity politics in the new situation has generated a large amount of interesting research where social and political communication have been studied in a cultural framework.

Communication, identity and nation building in Estonia consists of many approaches: Memory studies; studies on nationalism and 'otherness;' re-construction of collective identities; and, changing value-structures of different population groups have been part of this approach.



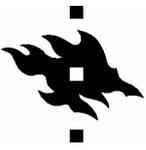
Interesting research in related areas has been conducted by Professor Mikko Lagerspetz (TLU), Dr. Peeter Torop (UT), Dr. Raivo Vetik (TLU) and Dr. Aili Aareleid-Tart, TLU.

At Tallinn University more qualitative oriented research approach in tackling these issues has been a growing during the last decade. Professor Mikko Lagerspetz's work has focused on the problems of changing civil society and media (*Mikko Lagerspetz (ed.) (1994): Social Problems in Newspapers: Studies around the Baltic Sea. Helsinki: Nordic Council of Alcohol and Drug Research and Sari Hanhinen (1994): "Changing world, changing problems: A comparison of Finnish and Estonian press materials", in Lagerspetz 1994*). This was a study on how social problems are reflected in Estonian newspapers and attracted several followers amongst his research group at the Estonian Institute of Humanities, TLU.

Besides social problems, another main research focus is the formation of civil society in Estonia, which includes media studies as a component of social change (see *Aire Trummal & Mikko Lagerspetz (2001): The Profile of Estonian Civil Society: A Preliminary Report on the Civicus Index on Civil Society Project in Estonia. Washington, DC and Lagerspetz, M.; Erle Rikmann; Rein Ruutsoo & Aire Trummal (2004): Democratic Consolidation and the Non-Profit Sector. Studies on the Development of Civil Society in Estonia, Tallinn*).

5.4 Technological Approach and New Media

The coming together of telecommunications, computing and the media, usually termed 'convergence,' is one of the central issues of Estonian society. The range of questions involved in this process is broad, covering as it does technical issues, business models, social changes, working practices, legal regulation, and a host of other things. The vast majority of the mass media in Estonia today are run as businesses. Even those whose primary source of revenue is from some sort of subsidy, for example ETV, are obliged both to demonstrate that they operate, as far as possible, according to established business principles, and to take any opportunity that presents itself to develop their commercial activities. In many cases, the Media industry itself requires more research on these issues.



Estonia offers fertile ground for the study of ICT and new media. The country has invested in IT for schools and e-government, encouraged private-sector innovation, invested UNDP funding in ICT training, and pursued liberal telecom regulation; producing double-digit economic growth and a higher rate of Internet usage than the European average.

The University of Tartu and Tallinn University have slightly different approaches to communication technology and new media. The research tradition that has evolved in Tartu by young scholars such as Pille Pruulmann-Vengerfeldt and Pille Runnel has focused mainly on the use of mobile technology and internet.

In her 2006 doctoral dissertation, Pille Pruulmann-Vengerfeldt examined "*Information technology users and uses within the different layers of the information environment in Estonia*" with the following questions: 1) What are the social implications of user-technology interaction within the different layers of the information environment? And 2) How are different social domain extended into virtual space?

The technological approach taken at Tallinn University has traditionally focused on e-learning, which of course has a technology side, but also emphasizes social, psychological, and cognitive aspects. Professor Mauri Kaipainen explains the mission of the MSc programme in Interactive Media and Knowledge Environments (IMKE):

"When I was invited to set up the new project, the research idea was that this e-learning focus is expanded: so that it covers different kinds of communities that communicate aided by digital technology and this is why we started talking about *knowledge environments* instead of learning environments. It covers things like e-democracy, e-participation, games etc, also services related to traditional media, like newspapers, blogs. The focus is design-oriented, how to design interactions, not so much the technology." (Professor Mauri Kaipainen)

The IMKE program is a fine example of the open-minded approach to academic development initiatives taken by Tallinn University.



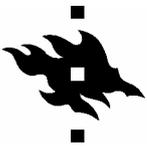
“Estonia is very advanced in these things and they are developed here more than in other countries, e.g. related to e-voting. I think our focus is very well anchored to what is happening in Estonia. There are no similar academic programmes, however, not in Estonia and not in Northern Europe – closest is probably Lübeck. We are not mainstream and traditional.” (Professor Mauri Kaipainen)

“Maybe all of these different applications of people developing the content [of web] – it is revolutionary in terms of new media. In Estonia the e-democracy applications: TOM (Täna Otsustan Mina) [website that is closed now] was a very good experiment and at least opened a discussion about how people should be facilitated to participate in democracy. The new ways have to be geared to more active citizen participation and initiatives. It was a very significant project (TOM); our department has been part of the discussion. Online forms of communication are very important addition to the media: people have much more to say.” (Professor Mauri Kaipainen)

5.5 Communication and Media Research in Estonian Society: Future Trends

It is easy to see how the Estonian media landscape has been described as a social laboratory, as well as a media laboratory, where changes that have taken several decades in the Western countries, have taken place in Estonia in less than a decade. This gives Estonian social and media research an extraordinary context. Given the small size of the country, Estonian research activity is commendable.

“I believe that it is characteristic especially to small nations and universities that you have to be able to merge and incorporate different things within academia. When were in Germany at every university they had their own narrow specialty. We are doing only this and you can do only that! At a small university and in the small country one individual should can and know everything – use different things and be able to mix them. It can be old fashioned to have this sort of Renaissance approach that we try to see the larger context all the time.” (Professor Marju Lauristin)



It would not be an overstatement to say that Estonian media researchers have a unique understanding of conditions of transitional societies, rapid capitalization and marketisation of the media-system, and the near immediate implementation of a totally new media policy during the 1990s. Linguistically and geographically Estonia forms a small territory where the impact of policy changes, innovations and application of new ideas can be immediately seen.

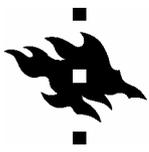
Consequently, Estonia offers an eligible ground for media research where experimental and innovative studies can be carried out easier than in bigger social and political units.

Opinions concerning the significance and applicability of media and communication research naturally vary between those interviewed from the media industry, policy-makers, civil servants and academics. However, in many cases, personal consultation and relationships between academia and industry are highly valued:

“We have sort of personal relationship with the media industry (laughing), that all our Estonian media magnates, if we can put it that way, are our students. That is the reason why the relationship is close and personal.” (Professor Marju Lauristin) In other cases, the value of scholarly work is assessed in more negative terms: “Visibility of the media research is close to zero in our society. I have not seen anything significant that would rock the world. For example studies like Lennart Weibull’s in Sweden or guys in Gothenburg University are doing. They are quite amazing. We are far from that but very are far from that. There are not more than ten media researchers in Estonia.” (Margo Veskimägi, Emor TNS)

The director Raivo Suni of ETV’s research centre pointedly summarized the Estonian state of communication and media research:

“In Eastern Europe Estonia is very unique, our research tradition is much longer than in other post-communist countries. During Soviet time studying the objective reality of the people was a taboo. We cannot much compete in breadth or width of research with Western Europe. We are in the transitional phase at the moment and there are lot of people in the top management of media houses that think that research is rubbish and commissioning that is wasting money. I think this is changing now.”



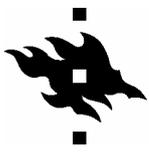
Generally, Estonian media and communication scholars see the future of media research positively. The role of communication and media in the society is increasing and lot of research is needed to tackle the challenges of Europeanization, harmonisation of media policy, and the economic shocks of global fluctuations. However, many of the expert interviewees were concerned as to whether politicians really understand the needs of knowledge-production in the field of social sciences and humanities.

Besides the researchers, many media specialists from the field admitted that the role of media and communication research in the Estonian society is increasing. The reason for the increased need for information is clear and lies in the understanding of the knowledge-based management of economic and cultural change

“There is an obvious need for these studies, which will not diminish. The communication field is only expanding in the modern world. There is more need for communication skills and people who know the techniques, because more assets are produced in terms of information. “Oral” work is more and more important in whatever field. In the framework of life-long learning people will require additional training and pursue new grades in this subject. It enables them to distribute messages as well as understand the social relations – those two should belong together, thus we also need interdisciplinary research that would bring together symbolic-semiotic aspects with behavioural and textual analysis.” (Professor Martin Ehala)

Contrary to common assumption, the interviewed specialists from media companies expressed the need for more analysts to examine and study changing media markets. However, those with a quantitative foundation were required by the media industry itself:

“The state’s attitude is that social scientists are not needed, but in fact the job market needs people with those skills. It depends of course what is the level of university graduates (=there’s no need to educate more if the level is low). Those people who have solid background in mathematics and quantitative research have always a good choice of jobs. Those are very much needed in media agencies too. They are now hiring graduates with mathematics degrees, because of the strong empirical training. Research needs to be based



on data, all the soft and imaginative can be built on this later on.” (Margus Paas, Kanal 2 Research director)

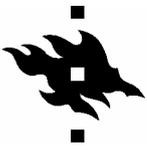
The fears of the future expressed by scholars were often linked to research funding and not so much to the content of education. Sectors of the social sciences and humanities are clearly underfinanced. Consequently, most of the research is done as part of normal daily work. Research communities have no possibilities to grow and use the synergy of benefits of scale. The number of publications remains fairly exiguous and empirical quality limited because of the short-term of research projects and the burden coming from the continuing teaching load.

“Funding system certainly has its impact: if we had a strong team, we could apply for the target financing or the Science Foundation grants, but these require a team (in target financing the minimum team is 5 people). We do not have enough people in the department, and most departments in Estonia have the same problem of critical mass. Maybe someone from among us could apply for a personal research grant; this is a possibility.” (Professor Martin Ehalä)

According to the academic experts the state is both unable and unwilling to fund social sciences or humanities in the way that it would support the growth of research units within universities. The Estonian funding system also favours natural sciences giving almost four times the monthly salary to a natural scientist than that of a colleague from social sciences and humanities. In addition, EU funding has been a disappointment:

“European Union gives so little money for social research. They think there that we just sit still and use some paper and pencils.” (Professor Marju Lauristin)

Because of the small size of the country many academics also mentioned the relatively limited number of people who could carry out academic media research. Although media and communication research is important – as well as well-educated researchers coming from these programmes – Estonia is not unusual in places funding to humanities and social sciences behind other projects.



As a proactive measure, co-operation between the universities of Tartu and Tallinn has started to evolve during recent years. Many academics saw this as one possibility to secure the development of media and communication studies in the future. According to Professor Marju Lauristin, the future Estonian university system may look similar to that of the Californian university system. Estonia would have a single-multi site university, with Tartu and Tallinn forming part of a national organizational structure. Sometimes, however, public opinion may effect who gets the funding and what is considered important in society.

“Perhaps researchers should explain more how important media is in society. Perhaps that would secure financing? Now people don’t trust newspapers and make their judgement based on what they see in the yellow press. That doesn’t exactly make people trust media more nor make them willing give money for research.” (Professor Martin Ehala)



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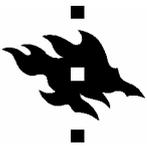
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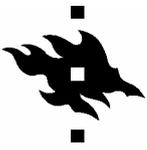
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Appendices

APPENDIX 1

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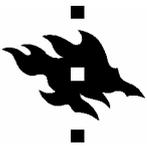
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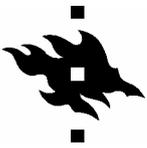
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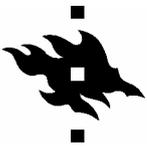
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