

Media for Russian language minorities: The role of Estonian Public Broadcasting (ERR) 1990–2013



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ABSTRACT: This article aims at exploring the ways in which Estonian Public Broadcasting (ERR) tackles one specific media service sphere; how television programmes for Russian language minorities are created in a small country. For that task development of the whole Estonian media landscape must be overviewed. By referring to McQuail's (2010) theoretical framework of media institutions' influencers, this article investigates how media policy, economic conditions and technology have influenced these processes. The article gives an insight into the development of Russian language media in such a small media market as Estonia.

KEYWORDS: public service broadcasting, Russian language media, media for minorities, Estonia



INTRODUCTION

From the end of the 1980s, Eastern and Central European countries started transition from the communist regime towards free democratic states. Among important aspects of that development were changes in media systems. In transition states, commercial broadcasters were founded, state-owned print media was mainly privatized, state radio and television companies became public service broadcasters; Soviet technical standards were replaced with Western ones. "Europeanization," as defined by Jakubowicz (2009), took place. The overall aims of the Pan-European media policy are preserving cultural diversity and safeguarding media pluralism. For doing so in Baltic countries the free market liberal approach was used (Curran, 1997, p. 139). Market forces and the private ownership of media were and still are idealized by Estonian government(s) (Jõesaar, 2011). The free market liberal approach is supported by European Union media policy, which is a common market ideology.

television progressive with cultural consequences (Hesmondhalgh, 2013, p. 285), but the separation of the Russian-speaking audience from Estonian information field caused by foreign Russian channels creates many challenges for society. Gitlin (1999, p. 173) argues whether democracy requires a public or a set of publics, a public sphere or “separate public sphericules.” It can be so, but according to the Habermasian theory of public sphere, these sphericules must also have a space or higher sphere where to communicate. Otherwise there will be isolated “islands of different groups” in society. It is argued that if there are no ongoing negotiations among members of different groups then the media can provide help. If this is true, then how can media policy support these processes?

For McQuail (2010) influencers of media institutions are: politics, technology and economics. In the next chapters an analysis of these three aspects is carried out. As already noted Estonia had and still has a very liberal media policy. Print media is unlicensed. There is no need for extra permission or registration. Launching a newspaper or a magazine is as easy as founding a private company. From the language perspective there are no differences in publishing in Estonian or in other languages.

Mainly due to the scarcity of transmission frequencies broadcasting was, and still is regulated at the state level. But the question is not only a technical one. Licensing of broadcasting companies is an important part of overall media policy.

ESTONIAN MEDIA MARKET AND KEY PLAYERS

In 2013, the total population of Estonia was 1.32 million, among whom 69.1 per cent were Estonians (Statistics Estonia, 2013). Among the non-Estonians living in Estonia, half were born in Estonia and one-third in other former Soviet states. From the language perspective, at least 93 per cent of non-Estonians are Russian speakers, and in Estonia these people are referred to as Russians. Nowadays, Russian is the mother tongue of 29.6 per cent of the Estonian population and 16 per cent of Russian-speaking people claim they do not understand Estonian at all (Lauristin et al., 2011). One can say that the size of the Russian language media markets is around 300,000 people.

The Estonian media market is dominated by three major media houses. The first is Eesti Meedia AS (until 2013 owned by Norwegian corporation Schibsted ASA, after management buyout belonging to Estonian capital). Eesti Meedia owns the biggest daily newspaper, a main national free-to-air commercial TV-channel accompanied with sister channels on a pay-TV platform, six radio stations, second largest Estonian internet portal, several local newspapers, magazines and printing house. The second largest media player is the Swedish Modern Times Group (MTG). MTG owns TV3 AS broadcasting, the second main free-to-air commercial TV channel, several pay-TV channels and two commercial radio stations. MTG also operates the Viasat sat-TV platform. The third largest private media company is Ekspress Grupp AS, which runs the biggest Estonian internet portal, publishes

one daily and two weekly newspapers and is co-owner of the biggest Estonian tabloid. On the public service media side there is the non-commercial Estonian Public Broadcasting (ERR) with two TV-channels, five radio stations and web portal.

POLITICAL BACKGROUND

McQuail's (2010) first influencer of media institutions is policy. As mentioned earlier, Estonian media policy is considered as liberal. Estonia's press freedom index is high (Freedom House, 2013). Estonia does not have specific press law; there is no licensing of online and print media companies. The first Broadcasting Act was passed in Parliament in 1994 and the primary objectives of this were to establish a dual media system — the co-existence of PSB and a commercial sector — as to secure editorial freedom and independence in broadcasting. Nowadays broadcasting is regulated by The Audiovisual Media Service Act and there is a separate Act for Estonian Public Broadcasting. Among many other aspects, such as licensing of broadcasting companies, commercial communication, programming quotas etc. dictated by Audiovisual Media Services Directive, finding the appropriate balance between the state language and local Russian-speaking media space design has been one of the key media policy issues.

During the licensing process for emerging private broadcasting companies in the early 1990s media policy makers were particularly concerned with the protection of emerging markets from foreign capital, enrichment of Estonian culture and media space development. The political motives were also important, whereas these were minimal or non-existent for the owners of Estonian-speaking broadcasting organisations. Ensuring the “correct political undercurrent” of broadcasting stations was a crucial issue for both legislative and executive powers. Free journalism was promoted forcibly. However, when issuing broadcasting licences, “Russian danger” or possible infiltration of Russian capital into Estonian media was closely guarded. At the same time, satisfying the needs and considering the interests of the Russian-speaking audience was considered important.

According to McQuail the second influencer of media institutions is technology (2010). During the 1990s the impact of technology in Eastern Europe was related to the replacement of Soviet broadcasting standards with western ones. All production, transmission and receiving equipment was exchanged. Large investments were needed on both sides — on the side of media companies and on the side of the audience. The print industry also needed modernization. Old soviet technology was amortized and did not meet the needs of the modern print industry.

FORMATION OF ESTONIA'S RUSSIAN-SPEAKING MEDIA

According to Integration Monitoring circa 50 per cent of Russian-speakers cannot follow media (print, online, radio and television) in Estonian because of an insufficient

knowledge of the language (Vihalemm, 2011). Whilst electronic media to some extent meets this demand, print media offerings are in decline. Development of Estonian Russian-language media can be summarised into time periods as shown in Table 1.

Table 1. Periods and main development trends of Russian-language media

Time period	Trends in development of Russian-language media
1991–1999 Active develop- ment	<ol style="list-style-type: none"> 1. The active development of print outlets in Russian language. Emergence of new outlets: if in 1991 there were eight newspapers with general socio-political content in Tallinn and North-eastern Estonia, by the end of 1999 there were already 16 newspapers. 2. The growth of radio broadcasting: in 1992 there was only one radio station transmitting in Russian (a public service one), by the end of 1999 there were six, amongst them five commercial stations. 3. The state-owned Estonian Television was transformed to a public service TV channel; commercial channels emerged and were sold to foreign capital. By the end of the period there were two nationwide commercial TV-channels. Some local Russian-language TV-channels were established. 4. First internet-portal in Russian language emerged in Estonia in 1991.
2000–2006 Stabilization	<ol style="list-style-type: none"> 1. Stabilization of the Russian-language press market. The number of newspapers varied from 12 to 15. 2. Emergence of new commercial TV channels. By the end of 2006 five commercial TV stations were on air. PSB Estonian Television produced several programmes in Russian. 3. The number of Russian language radio stations in this period constituted seven, among them Estonian Radio 4. Commercial radio stations were profiled mainly towards mainstream music, short news and entertainment programmes. 4. Still only one internet portal in Russian language.
2007–2010 Economy crisis; rise of internet portals	<ol style="list-style-type: none"> 5. Economic crisis caused advertising market collapse. Due to the sharp decline of revenues several newspapers were closed. By the end of 2010 there were only ten newspapers in Russian with general content. The two oldest dailies were closed, only one remained. Second PSB TV channel ETV2 was launched. It offered some programmes in Russian, but against the initial plans was not developed as a PSB TV channel in Russian. 6. There were not big changes in the radio sphere in comparison with the previous time period. The active growth of internet portals began to have a negative influence on the printed press market. If in 2006 there were only two internet portals with general content, by 2010 there were seven of them. All newspapers created internet portals on the base of print content.

Time period	Trends in development of Russian-language media
2011–2013 Modest development for the internet and TV; stagnation for print media	Stagnation of Russian-language press market. The only daily newspaper has been issued only three times a week since June 2013. Seven TV stations which broadcast at least partly in Russian operate in Estonia. The quality of programmes depends on channels and may vary a lot. Eight Estonian radio stations broadcast in Russian language, one of them is PSB, others are commercial. Internet portals occupy a strong position in the Russian-language media market in Estonia. One new internet portal was established. By the end of 2013 there were eight Russian-language media portals in Estonia.

Source: authors.

The major trend for the last three periods described in Table 1 is that circulations of all print press titles have been decreasing since 1998. The most vulnerable position is among dailies whereas weeklies are in a more preferable position (Table 2).

Table 2. Circulation of Russian-language outlets 1998–2013 (in thousands)

	1998	2000	2002	2004	2006	2008	2010	2012	2013
Molodjozh Estonii	7.2	4.9	7.5	7.7					
Estonia / Vesti Dnja	8.7	7.9	6.3	8.5	9.2				
Vesti Nedelja Pljus	21.12	23.5	19.9	16.1					
Den za Dnjom	16.7	19.4	18.6	14.5	17	13	13.2	10.4	10.5
Delovyje Vedomosti	4.8	4.8	5.1	5.3	6	5.8	4.8	7	3.8
Molodjozh Estonii Subbota	9.9	7.1	10.3	11.3	11.5				
MK Estonii					14.3	11	11.1	12.9	31.1
Postimees na Russkom Jazyk					17.1	12.3	11.5	9.6	7.8

Source: newspaper industry statistics by Estonian Newspaper Association. Retrieved April 25, 2014, from <http://www.eall.ee/ajalehetoostus/index.html>.

DEVELOPMENT OF RUSSIAN-LANGUAGE BROADCASTERS

Director General of Estonian Radio Peeter Sookruus (1991, p. 19) envisioned Estonian Radio as a public service broadcaster producing and broadcasting three programmes in Estonian and one in Russian. Such a vision was in accordance with the linguistic distribution of the population. This proportion — one of four — was

achieved in public service radio already in 1993, when in addition to the three programmes in Estonian a Russian-language program was launched.

Table 3. Number of radio channels in Estonia

	1995	2013
Private radio channels in Estonian	41	21
Private radio channels in Russian	2	8
Public service radio programmes in Russian	1	1
Public service radio programmes in Estonian	3	4

Source: authors' calculations based on the statistics of issued broadcasting licenses by the Ministry of Culture.

Today, of 29 radio licences, eight are given to broadcast Russian-language programmes, public service Radio 4 functions under the National Public Broadcasting Act. Thus it can be said that by 2013 the radio landscape in Estonia reflects the ratio of 3:1 of the linguistic distribution of population (Table 3).

Until the beginning of the 1990s, the main TV channels that broadcast on Estonian territory were Estonian Television (ETV) and three channels from Russia: Ostankino TV, Russia TV and Leningrad TV. The re-transmission of all Russian television and radio channels was terminated in 1991–1994. The frequencies and networks they had occupied were licensed to newly born Estonian private broadcasters.

For the Russian-speaking audience, the changes taking place at the beginning of the 1990s were dramatic; the number of programme hours offered through terrestrial broadcasting in Russian dropped substantially. No domestic national TV channel targeted at Russian speakers was established. The market demand for programmes in Russian was met by cable operators. They expanded their networks rapidly and started to re-transmit Russian channels available on satellites.

Today there are 14 valid TV licences in Estonia as on 1 May 2014. Three of those are aimed at a Russian-speaking audience. With the widespread use of cable networks and IPTV in areas of the Russian-speaking population, these programmes are now easily accessible. At the same time, they are not as far as popular as Russian TV programmes (see thereafter). It is noteworthy that there are a number of foreign thematic TV channels in Russian, available in cable packages. In total, these “other” channels reached 87 per cent of Russian speakers weekly and took up 39 per cent of their viewing time in 2012 (see Figure 1).

The most popular TV station among Russian speakers is Pervyi Baltijski Kanal (First Baltic Channel, PBK), which is owned and operated by a Latvian independent legal entity working under two jurisdictions; they have a broadcasting license issued by LNRT Latvia and by the British Ofcom. The PBK channel is available in all the Baltic States on all technical platforms: satellite, cable, IPTV and DTT pay TV packages. It primarily re-transmits the Russian commercial TV channel

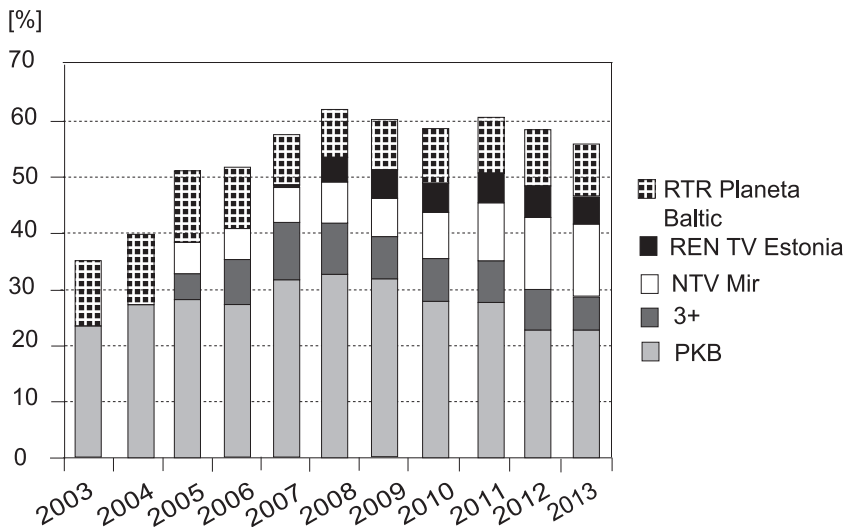


Figure 1. Russian-speakers' share of viewing of the main Russian language TV channels

Source: TNS Emor Peoplemeter Survey 2003–2013.

ORT (controlled by the Russian government), but also includes a daily newscast produced locally in each country in the format of ORT's main news programme (*Vremja*), and is scheduled immediately after the latter at prime-time.

Among the most watched channels only Viasat 3+ is Russian. This is owned by the Modern Times Group and broadcasts mainly Western series and movies with a Russian voiceover; in addition a considerable amount of entertainment programming acquired from Russia fills the channel's schedule. So, one can say that a big part of the Russian-language Estonian population is following mainly Russian television channels and is therefore more integrated into a Russian information field than an Estonian one.

MINORITY LANGUAGE AUDIENCE AS A MARKET FAILURE

The third influence on media institutions is economics (McQuail, 2010). A significant difference in the development of Estonian and Russian-language private media is the inclusion of private capital. Estonian media enterprises developed mostly with the help of western investments — Scandinavian media companies generally became the owners of these enterprises. Norwegian Schibsted ASA purchased the most widespread national newspaper *Postimees*, several county newspapers, TV channel Kanal 2, a printing house and later shares in the Trio radio group. Finnish Mainos TV invested in AS *Reklaamitelevision* that later merged with EVTV to form TV 3, a part of Swedish Modern Time Group. MTG also founded two radio stations. Bonnier Group acquired shares in newspapers *Eesti Ekspress* and *Äripäev*. The main goal of all these

foreign companies that invested in the Estonian media sector was to gain profit from a newly opened market.

No investments have come from abroad into Russian-language media. Media channels were owned or created by local non-Estonian entrepreneurs. Unfortunately these did not have sufficient resources to create good quality audience-capturing media products. There was a lack of critical mass — of quantity, quality, and audience. Considering the smallness of potential market, foreign capital did not have any interest in contributing to this narrow sector. Taking into account Russia's near abroad foreign policy, Russian money could have come into the Estonian media sector with political aims. This however did not happen, not at least to the extent to start and maintain a local Russian-language TV programme, newspaper and/or radio station. Probably such investment was not considered important as Russian-speaking people living in Estonia followed Russia's main TV channels anyway. Attempts to involve foreign private capital from either East or West by Russian-language media companies were not successful.

The profit and outcome of Russian-language media companies provide a good description of the shortage of resources. Analysis of Russian-language print media indicates that because of unprofitable business the newspapers often went bankrupt or frequently changed owners. In several cases the official financial results are not declared. As an example, the financial standing of the newspaper *Den za Dnjom* by owners in 2001–2008 can be considered. There is no data regarding the financial status of the company in official databases before that time and data from years 2004, 2005, 2007 and 2008 is missing. In 2008 the publisher of the newspaper was purchased by AS Postimees. In 2012 the publisher was merged with Postimees AS and the financial results of the newspaper are no longer available separately (Figure 2).

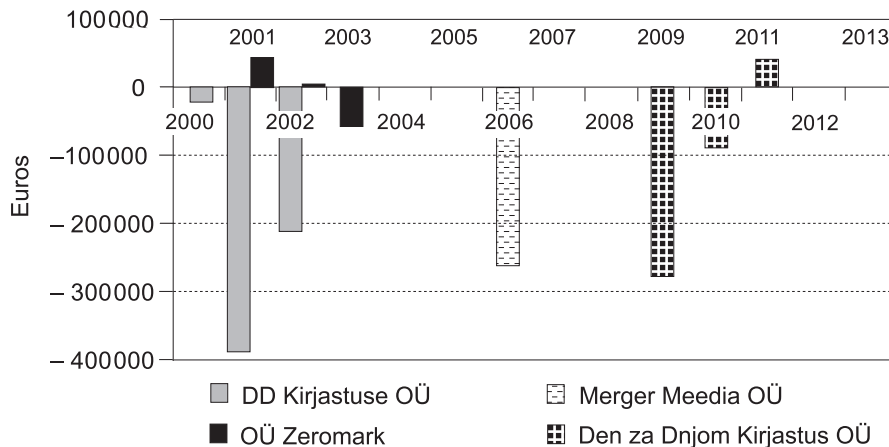


Figure 2. Profit and loss of newspaper *Den za Dnjom* publishers

Source: authors' calculations based on company annual reports from Business Register.

In comparison with the financial results of the two biggest private TV channels (see Figure 3) the turnover of Russian-language Estonian broadcasters follows a similar pattern (see Figure 4). There is however a difference in the profitability of the channels. As the main source of income for major TV channels is advertising sales, the economic crises at the end of 1990s and beginning of 2008 influenced their income far more than that of small companies functioning on project support.

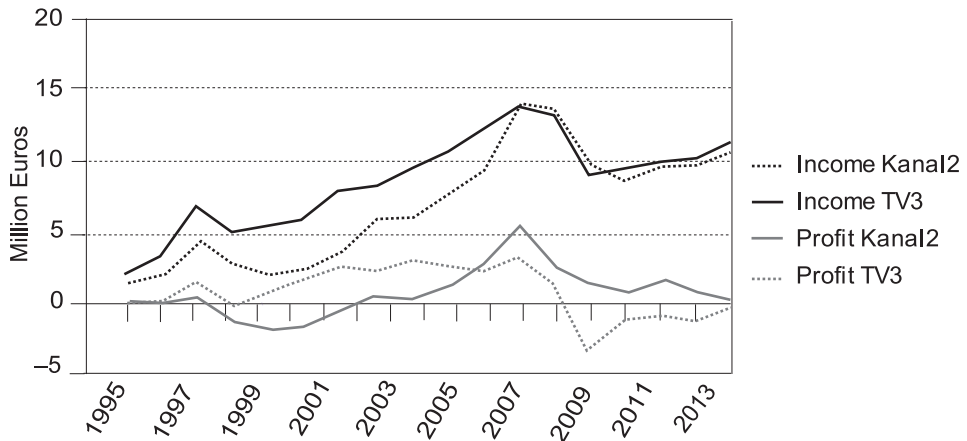


Figure 3. Financial results of TV3 and Kanal 2

Source: authors' calculations based on company annual reports from Business Register.

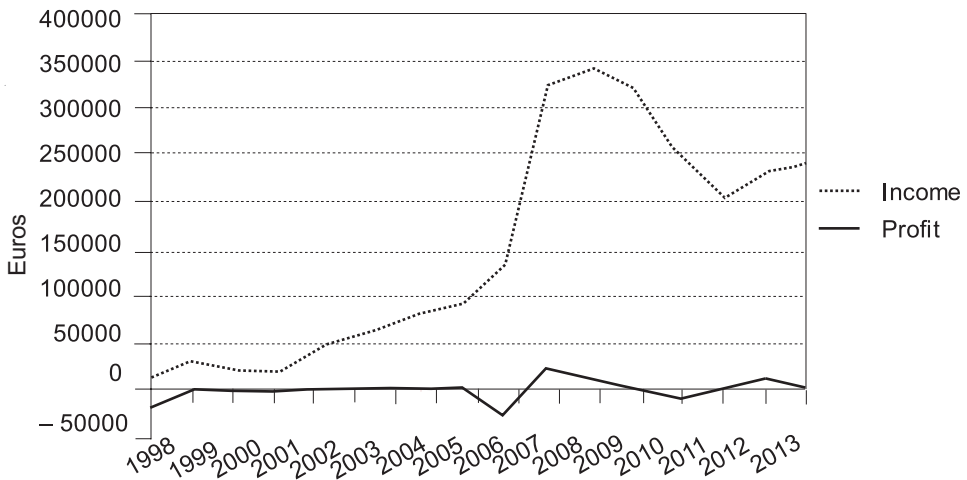


Figure 4. Summarized financial results of Russian languages TV-channels

Source: authors' calculations based on company annual reports from Business Register.

While the financial results of Estonian-language media companies can be usually found in official databases from the mid-1990s to the present, the same information regarding Russian-language publications is incomplete in the national register. Despite that a general trend in Russian-language printed media can be pointed out — this is the decrease in income.

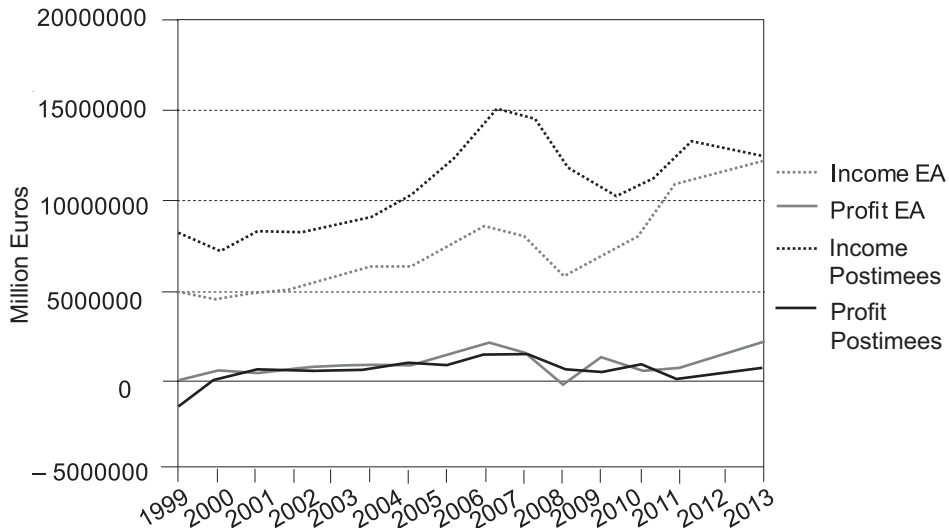


Figure 5. Financial characteristics of media companies Eesti Ajalehed (EA) and Postimees

Source: author's calculations based on company annual reports from E-Business register.

Comparison of financial results of the two biggest newspaper publishers (Figure 5) and Russian-language newspaper publisher (Figure 2) in Estonia indicates a difference. The same difference occurs when financial parameters of Estonian commercial TV channels (Figure 3) are compared with their Russian counterparts (Figure 4).

Differently from the Russian language print media there has been no change of ownership or bankruptcy of Russian-language TV channels but it must be pointed out that there is still no domestic TV channel producing and broadcasting nationwide full-time, free to air Russian-language programmes in Estonia.

The private sector's unwillingness to work for language niche audiences is understandable from the business point of view. Investments into expensive niche media products are not profitable. A potential audience of around 300,000 Russian-speaking viewers is not big enough for profitable launch of a commercial TV-channel, especially in the situation where there are plenty of attractive foreign Russian TV channels available through cable networks and satellite platforms. A cheaper form of mass media — newspapers — is facing problems to gain enough readers needed for sustainable business. Economic regression which started in 2007 has heavily decreased advertising revenues. Traditional newspapers lost more than 60 per cent of their yearly advertising revenues (Figure 6).

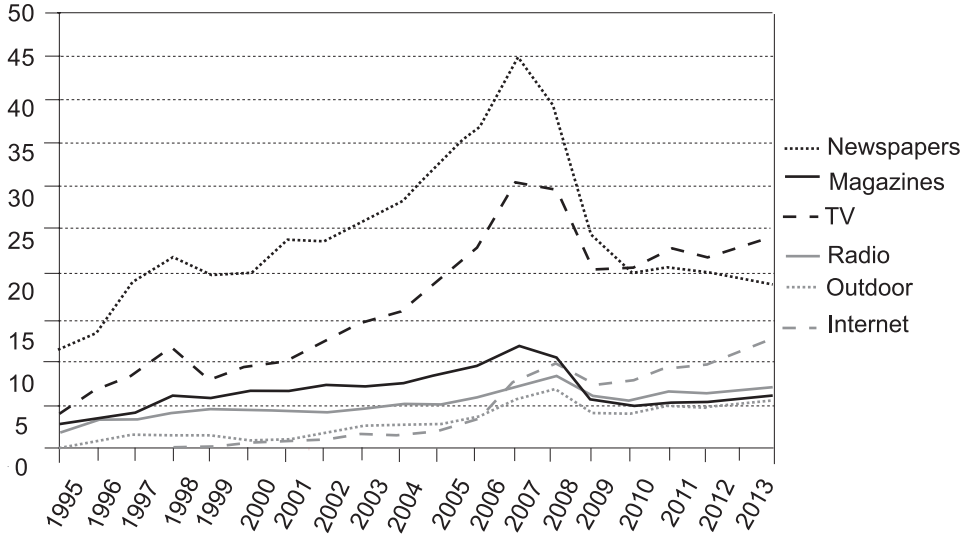


Figure 6. Estonian advertising market value

Source: author’s calculations based on TNS Emor media market monitoring reports 1996–2013.

While major media companies had some internal resources which helped them to survive under extensive cost cuttings, smaller companies were forced to close down their activities. Private media companies with Russian language media products belong to the latter group. Russian language media’s already unfavourable economic situation deteriorated dramatically.

THE ROLE OF PUBLIC SERVICE BROADCASTING

Research conducted by Lauristin (2004, 2009), Lauk (2008), Lõhmus et al. (2010) underlines the special role public service broadcasting (PSB) carries for small countries like Estonia. It is especially important in markets where private broadcasting is commercialized, that PSB maintains its role as a reliable provider of a trustful source of information. The roles of public service media in the public sphere, pluralism and democratic development are described as the crucial ones. All these factors have a direct influence on society and citizens. Enhancing democracy and cultural heritage, improving social cohesion, developing a platform for open debate, guaranteeing media pluralism, being a source of reliable and independent information — these are important functions of PSB. Without fulfilment of these functions the development of democratic society is under serious threat.

Even if this seems to be a strong and relevant statement it is not everywhere and always supported from the political level with sufficient public service broadcasting

funding. In the Estonian case the only source of revenues is from the state budget (ERR does not have commercial revenues, sales of advertising airtime is prohibited). One reason for that is the European Union media policy which is subordinate to economic policy (Harcourt, 2005; Jõesaar, 2011). In a similar way to the other industries' regulations also media regulation is shaped by market forces to a large extent. The result of a liberal regulatory process is that media will be more and more commercialized.

As shown by Lowe and Nissen (2011) as well as Jõesaar (2011) in the poorer smaller states commercial media tends to be more global entertainment oriented than in smaller wealthy states. To balance global entertainment, PSB should have strong and interesting own-production, which is more costly than mass produced acquisition. This results in the conclusion that for strong public service broadcasting, PSB funding in small markets should be at a relatively higher level than in large markets. In reality the situation is the opposite. The level of available funding is (an immediate) cause for PSB performance.

In the case of Estonia, as shown earlier there actually exist two main audiences — national language speakers and Russian speakers. This means that for serving both communities in the best way, double the amount of funding is needed. It is evident that private media is not able to serve Russian-language citizens at a proper level. There is neither a nationwide daily newspaper nor full-scale TV-channel in Russian, television programmes offered in Russian still do not have a critical mass to attract its target audience on a large scale; Russian language music radio stations are orientated towards entertainment of young audiences, only the Estonian public broadcaster's nationwide radio programme in Russian Radio 4 offers quality journalistic content; newspapers in Russian have a very moderate penetration.

PSB'S TRADITION OF RUSSIAN LANGUAGE PROGRAMMING

In the Soviet-era, Estonian Television (ETV) produced news and primarily cultural and educational programmes in Russian during the 1960s and the 1970s. In the mid-1970s, the offer of pan-Union Russian programmes intensified. In the context of the USSR, local Russian language programmes were never treated as those targeted to a minority, because the speakers of the non-native language among the population of a republic of the Union were never considered as minorities. Programmes in Russian, broadcast by the TV stations of the republics, expressed one of the Russification methods used by the USSR; the production of these programmes was not driven by the modern idea of complying with the information needs of a minority. In Estonia, where only one local TV station existed, a third of its schedule was filled with the Central Television programmes of the Soviet Union. The content scope of local programmes in Russian developed only partially. From 1980 to 1991, ETV aired only approximately an hour of domestic programmes in Russian (including news) daily (Shein, 2005). Few television journalists spoke Russian as

their mother tongue, and the content they produced was limited, mainly cultural, music and educational programmes; analytical journalism was almost non-existent.

From 1990, with the exception of news, Russian ETV programmes were aired on Saturday daytime and the content scope extended from information to entertainment. The volume of programmes was fewer than 200 hours per year. Due to the lack of viewers, attempts were made to find a better timeslot, and in the middle of the 1990s, a programme strip in Russian was created to air before the pre-prime news in Russian on work days.

In the early 1990s, Russian language TV journalism existed only in ETV. Independent producers had not yet appeared, and when they did, around the end of the decade, the majority were individual producers and fully dependent on their financiers. Commercial stations did not pay to show programmes in Russian, instead, barter deals were offered: the producers could sell advertisement time inside their programmes. The budget of PSB television was also highly dependent on advertisements, so, as the volume of other production grew, the programmes in Russian were pushed into the background, as something unattractive to advertising agencies. Although some good publicists emerged among the Russian-speaking television journalists, they probably felt the air of suspicion of disloyalty, and therefore tried to choose topics as neutral as possible, which, in return, did not help to increase the interest of viewers. The integration programme, launched in the second half of the 1990s and funded by the EU, produced a shift in the content focus, which moved to integration-related topics (Lauristin, 2004).

Notwithstanding the incompleteness of the statistics covering the end of the 1990s, we can estimate that the volume of Russian language programming rose above 200 hours in 1998–1999, when over 10 different series' were aired on ETV (Trapido, 2000, p. 112; Shein, 2005). Unfortunately, this was the time of the economic downturn, and the attempt by the management to increase its own production's output, in circumstances whereby the state grant had been cut back by 10 per cent, caused a serious budgetary crisis. At the beginning of the 2000s, the crisis led to a recession in all activities, including the production of Russian programming in ETV. By April 2000, the budget for Russian programmes had decreased five times since 1998, and enabled the production of just one half-hour programme per week (PRTM, 2000).

The budgetary crisis resulted in cut-backs in several programming sectors and produced changes in management logistics. The Russian-language programme unit was closed. The production of Russian programmes was initiated on the orders of ETV's programme management, mainly in the form of co-production between independent producers and ETV. It was primarily the production of the news that continued to be financed from ETV's budget. The remainder of the in-house production received funding from the Integration Foundation or from other public funds. Part of the schedule was acquired from Russia, and re-runs of some Estonian programmes with Russian subtitles were also scheduled for Russian timeslots.

Several former employees of ETV now work as independent producers, acquiring the necessary additional financing from public funds. However, a specific centre of competence, which should work on developing a cohesive concept of television programmes aimed towards non-Estonians and executing related ideas, does not currently exist in Estonia. This fact has also been pointed out in the debates discussing the launch of a television channel in Russian (Ajustrust Konsultatsioonid, 2007).

TODAY'S CHALLENGES FOR PUBLIC SERVICE MEDIA

Public service Radio 4, once indisputable leader among Russian-language radio stations, is still a leader, but the listening trend is clearly negative (Figure 7). Commercial music radio stations are gaining a market share. It will be challenging for PSM to retain its position in the Russian language radio market.

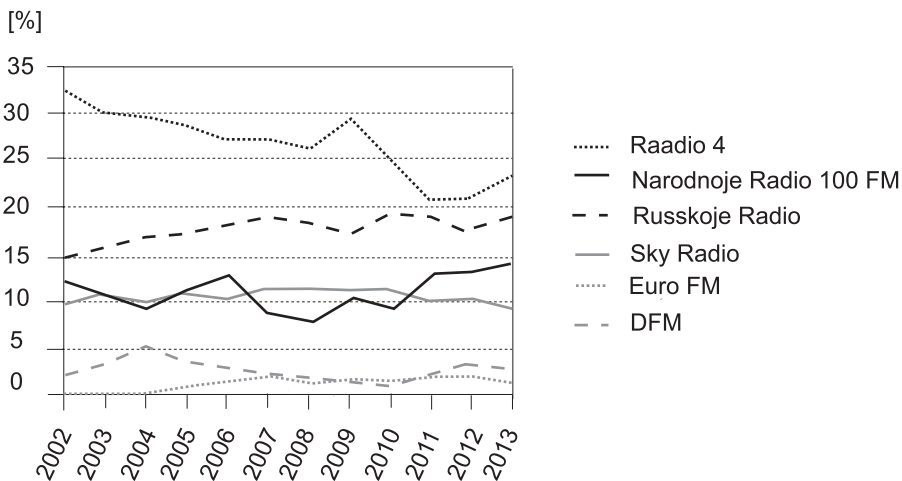


Figure 7. Russian language radio stations share of listening

Source: TNS Emor radio audience survey.

Estonian Television's position among the Russian-speaking audience is complicated. In 2008, another economic downturn enforced ETV to make budgetary cut-backs and the volume of Russian language programmes dropped to a level last experienced in the middle of the previous decade (Figure 8). Only one series was produced for the Russian audience, which, too, received funding from external sources. Despite the lack of funding, ETV2 started broadcasting in summer 2008 and continues to be on air. However, the original concept of this new channel, broadcasting in Russian at least on prime-time, was revised. Today, the main scope of the channel is cultural and educational programmes and this task is primarily fulfilled by using ETV's archives. As no extra financial resources are allocated from

the state budget, the new in-house production is minimal, primarily consisting of original children’s programmes, which also have an important role in ETV2.

Notwithstanding, the launch of ETV2 opened up new possibilities and, from 2009 onwards, the volume of Russian language programming has significantly increased, although the major part of in-house productions (with the exception of the news) was still financed from external sources. Furthermore, re-runs from the ETV archives and Estonian language current affairs programmes with Russian subtitles increased the output. The result is that a prime-time slot, including news, some information programmes and acquired drama series scheduled for Russian speakers, today exists on ETV2. Still, these programmes are not sufficiently efficient to attract the Russian-speaking audience and to integrate them into the Estonian information field. The decline in 2012 is caused by the cut in the production of original programming in Russian. In 2012, ETV’s channels occupied only 1.8 per cent of the viewing time of non-Estonians.

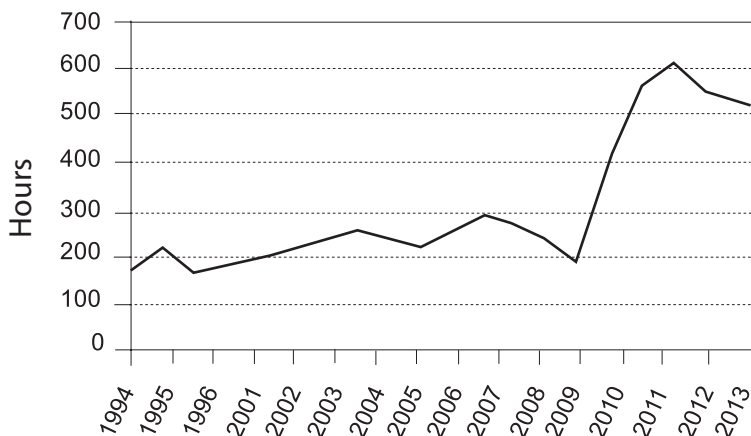


Figure 8. ETV’s yearly total programme hours targeted at the Russian-speaking audience: 1994–1996; 2001–2013

Source: authors’ calculation.

Particularly, a remarkable increase in output of Russian language news occurred after the news was transferred to ETV2, where a longer timeslot was available. Unfortunately, the shift to ETV2 meant that the Russian news lost some of its viewers. Since 2010, the news is repeated on MTG channel 3+; the audience remains but quite small.

CONCLUSIONS

The development of Russian-language media in Estonia after the country regained its independence in 1991 were influenced by the range of factors (political,

economic and technological influencers) and resulted in the rapid changes on the media landscape, the severe shortage of Russian-language media channels and the decrease of volume of advertisement market. One more impact resulted in the creation of two different information fields, which is based on linguistically different population groups: native Russian-speakers and Estonian-speakers. Only one third of the Russian-speaking population consider themselves regular consumers of media channels in Estonian (Vihalemm, 2011).

The whole media system in Estonia has been changed. Establishment of liberal media principles in re-independent Estonia ended undemocratic supervision and gave media independence. Newspapers, magazines, TV and radio that were ideologically and economically strictly controlled by the central power of USSR had to reorganize their activity, according to free market principles. Due to different reasons, to Russian-language media in Estonia free market circumstances proved disadvantageous. While Estonian media companies soon found investors from the Nordic countries, Russian-language enterprises had to rely on domestic resources only which turned out to be scarce. They could not establish cooperation either with Nordic, or Russia's investors. Furthermore, the number of readers decreased rapidly and in 2013 no Russian-language daily newspaper was published in Estonia. The weeklies have done slightly better. The newspaper with the widest circulation is a city newspaper reflecting the political interests of the capital's city government.

Local Russian-language broadcasting in Soviet Estonia produced some educational and cultural programs on the only national TV channel while the choice of programming at pan-Soviet TV channels was abundant. A number of Russian-language TV commercial satellite channels were created after Estonia regained independence, aimed to create programs oriented at Russian-speaking viewers and making profit from the local advertising market. Unfortunately, broadcasting such channels was limited and the lack of the resources did not allow to produce high quality programs which could compete with Russia's television and programs of Public Service Television. Therefore the amount of viewers was not considerable enough to rouse the interest of advertisers. Russia's television channels remain the main source of information for Estonia's Russian-speaking minority. This however did not fulfil the duties of a democratic media system. Information and debate on the development and functioning of Estonia's society could only come from domestic media, mainly from Estonian Radio and Estonian Television that were being transformed into public service broadcasting organisations. When availability of creative resources, market conditions and economic atmosphere do not favour commercial media, this kind of market failure should be balanced by public service media.

Estonian Radio was successful at launching a Russian-language radio programme — Raadio 4, which is the most popular radio among the Russian-speakers. There is also a number of commercial radio stations in Estonia which

produce mainly entertainment content, while the biggest amount of socio-political discussions and news programs belong to Estonian Public Service Radio — Raadio 4.

Estonian Television, however, had two Estonian-language channels (ETV1 and ETV2). Single Russian-language slots on ETV 2 did not find many viewers. At present, the amount of time spent on watching any Estonian-language TV channel, including commercial channels, is decreasing to a marginal level among the Russian-speaking audience. From the viewpoint of Estonia's social and cultural coherence this is a negative trend but altering an established framework presupposes a clearly stated political programme. Regrettably, various ideas to increase PSM output in Russian on all media platforms, especially in television, have not received political support and because of that the Russian language content is heavily under-financed.

The launch of the PSB Russian language TV-channel, ETV2, has been debated for almost two decades. It has been mentioned in parliamentary debates and has been part of a number of PSB's development plans. A short list of arguments supporting and opposing ETV2 in Russian is as follows:

For

- The channel will support the enhancement, development and servicing of social, political and cultural citizenship;
- It will offer adequate and reliable information to all citizens and inhabitants;
- It will extenuate tensions between two ethnic groups;
- It will serve as a balancing force to Moscow, lowering national security risks.

Against

- To attract a Russian audience (extra) high quality programmes are needed;
- It is too expensive; sufficient additional financial resources are unavailable;
- Whatever the programme, it is unrealistic to expect that it will attract the attention of the Russian audience, because of high competition from abroad;
- There is no need for such a channel — in the long run, all citizens will understand Estonian and will therefore be capable of watching Estonian programmes;
- If state financed propaganda is required, these programmes should be ordered from, and aired on, PBK.

The topic gained new importance during the crisis in Ukraine, when it appeared that a considerable proportion of the Russian population supports the annexation of Crimea. The subject of a full-time Russian-language TV channel, either a domestic, pan-Baltic or pan-European one, was an important issue on the hustings for the European Parliament. The discussions concluded that development of Russian-language media may prove to be an issue of national security in Estonia. The ex-Prime Minister, however, stated that a stable economy and individual welfare have a stronger influence on people's mentality than a media channel. This indicates that reaching political consensus is still the main obstacle to developing minority language media.

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