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MEDIA FOR THE MINORITIES: RUSSIAN LANGUAGE MEDIA IN ESTONIA 1990–2012

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ABSTRACT: This article aims to explore the ways in which Estonian public broadcasting tackles one specific media service sphere; how television programmes for language minorities are created in a small country, how economics and European Union media policy have influenced this processes. The article highlights major tensions, namely between Estonian and Russian media outlets, Estonian and Russian speakers within Estonia and the EU and Estonia concerning the role of public service broadcasting (PSB). For research McQuail's (2010) theoretical framework of media institutions' influencers – politics, technology and economics – is used. For analyses media regulatory acts and audience surveys are accomplished with media institutions financial data from the beginning of 1990s until 2012. This kind of approach gives a comprehensive overview of development of Russian language media in such a small media market as Estonia is.

KEYWORDS: public service broadcasting, Russian language media, European media policy, Estonia

INTRODUCTION

From the end of the 1980s, Eastern and Central European countries had the noble aim of changing from the communist regime towards free democratic wel¬fare states. Among the important aspects of that development were changes in the 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. 'Europeanization', as defined by Jakubowicz (2009), took place. The overall aims of Pan-European media policy were preserving cultural diversity and safeguarding media pluralism. For doing so there are two main approaches to organizing the media – the free market liberal and collectivist-statist strategies (Curran, 1997: 139). Coming from the communist regime, an alternative, the collective provision, was difficult to introduce due to the experience from the recent past. Therefore, the first strategy was introduced mainly in CEE countries, especially in the Baltic states. The free market liberal approach was supported by European Union media policy, which is a common market ideology. Several researchers claim that economic welfare is a dominating value in communications policy (Picard, 2002a; Croteau and Hoynes, 2001: 21; Murdock and Golding, 1989: 192). Private ownership of media was also idealized by ruling politicians (Jõesaar, 2011). The former Television Without Frontiers Directive (TVWF), now the Audiovisual Media Services Directive (AVMSD), does not take into account country-specific circumstances such as size of the national (and media) market, economic conditions, cultural and historical specific context. However, these are important factors which have a strong influence on media development and performance (Lowe et al., 2011). Implementation of the same EU legal framework in different circumstances gives different results in different member states (Jakubowicz, 2007a).

Knell and Srholec (2007) have analysed the post-communist countries using a Varieties of Capitalism framework defined by Hall and Soskice (2001). Their finding provides a solid cornerstone for further media analyses – Estonia is described as a country with a liberal market economy. Bohle and Greskovits' (2012) and Buchen's (2007) researches come to the same conclusions after comparing Estonian and other Eastern European countries economies.

SMALL MARKET, BIG PROBLEMS

For development, small market size plays an important role (Puppis, 2009; Lowe et al., 2011). This has been an advantage in building up the Estonian e-State (Charles, 2009), but a disadvantage where national journalism is concerned.

Market size determines resources' availability. In smaller states there are fewer resources available (Doyle, 2002; Lowe et al., 2011; Jõesaar, 2011). If the market is big enough for profitable business and resources are available, the general media tasks (variety, pluralism etc.) are fulfilled and launch of niche media outlets will follow. On the other hand, restricted market entry and global concentration of ownership encourage common denominator provision for the mass market. Market-based media system is incapable of presenting a full range of political and economic interests in the public domain and finding expression in popular fiction (Curran, 1997: 140).

Functioning base for private media is driven by the basic principles of market economy, not by the needs of civil society in the first place. "One dollar, one voice" is a generalization of market economy principles by Croteau and Hoynes (2001: 21). This is a simplification of the essence of mass media, but also a relevant factor which shapes commercial media in particular and through this the whole media economy. Privatized communication markets primarily address people in their role as consumers rather than as citizens (Murdock and Golding, 1989: 192).

Market forces do not guarantee that the media will serve their non-economic function as institutions of the democratic public sphere, and in many ways the breakdown of the forces that counterbalanced market forces has already taken its toll on the quality of news, sensationalism and other ethical problems, biases in the segments of society served by the media, and in some cases potentially dangerous concentrations of media power (Hallin, 2008: 55).

Due to market limitations, it is unprofitable to launch a wide range of media products in smaller markets. The diversity of content offered will be lower in smaller states than in large markets. In the first place, commercial media focuses on mainstream content. If the market is not big enough for the private sector to deliver a variety of media products in a national language, how then are the interests of minority groups served? Minority language groups in small countries are a tiny, unprofitable niche market. This case study examines one such niche market – the Russian language media in Estonia.

When talking about economical background of multilingual markets, Hesmondhalgh (2013) refers to the taste of different ethnic groups. Can we talk about common culture or about geocultural markets as defined by Hesmondhalgh (2013: 279)? Even if there is a shared history, the interpretation of it still remains largely different for the main ethnic groups. It is more relevant to talk about geolinguistics and diasporic media. There are definitely some positive examples of cross border television progressive with cultural consequences (Hesmondhalgh, 2013: 285), but the separation of the Russian-speaking audience from the Estonian information field caused by foreign Russian channels creates many challenges for Estonian society. Gitlin (1999: 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 higher communication space or sphere. Otherwise there will be isolated 'islands of different groups' in the society. It is argued that if there are no ongoing negotiations among members of different groups then media can provide help. If this is true, then how can media policy support these processes?

According to 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. Establishing of a newspaper or a magazine is as easy as founding of any private company. From the language perspective there are no differences in publishing in Estonian or in other languages.

Due to the scarcity of transmission frequencies broadcasting was, and still is, regulated on the state and European level. The question is, however, not only a technical one. Licensing of broadcasting companies is an important part of overall media policy.

FORMATION OF ESTONIA'S RUSSIAN-SPEAKING MEDIA: INTRODUCING LIBERTY OF PRESS, CHANGING OF TECHNOLOGIES

In the first half of the 1990s, dramatic changes on the Estonian media landscape took place: a) Privatization of the print media; b) Terminating re-transmission of pan-Soviet radio and TV channels; c) The sharp decline of availability of pan-Soviet newspapers issued in Russia (Russian newspapers which were previously widely and cheaply available were to be ordered on the same basis as all other foreign editions); d) Transition radio frequencies from UKV to FM and closing of medium wave radio stations; e) Replacing SECAM television standard with PAL; f) Opening radio and TV frequencies so far strictly used by the state only for emerging private broadcasters.

As already mentioned, according to McQuail one of the influencers of the media institutions is technology (2010). During the 90s, 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 replaced. Large investments were needed on both sides – on the side of media companies and on the side of audience. Print industry needed modernization as well. Old Soviet technology was amortized and did not meet the needs of modern print industry.

Radio programmes could be listened to with old Soviet radios on UKV frequencies whereas FM frequencies could be heard only with technology compatible with western standards that could not be purchased in the Soviet Union. The use of UKV frequencies ended by the beginning of 1993 with the national frequency plan and the programmes using those frequencies were either shut down or transferred to FM frequencies.

Though one can say the impact of technology was the same for all media companies, there was still a difference in the impact on audiences. It was easier for wealthier population groups to buy new radio and TV sets. People with lower incomes, especially among the Russian-speaking population in the eastern part of Estonia, who could not afford new sets, continued to follow Russian radio stations and TV channels which broadcasted in the old standards. So it can be said that, at least for a certain time period, technology was an additional producer of separation between the two language groups. Roots of this process are hidden in economy.

RUSSIAN-LANGUAGE PRESS MEDIA IN ESTONIA

After regaining independence, Estonian media became dependent on economic, social and political factors to a great extent. This concerned media in Estonian and Russian language as well. In the process of privatization two of the oldest newspapers, *Estonija* and *Molodjozh Estonii*, were involved. Until 1991, the papers were financially and ideologically controlled by Soviet authorities.

The editorial staff of both newspapers created joint-stock companies; the majority of shares belonged to the editors who indeed became owners of these newspapers. However, step by step, journalists who were not able to invest lost their shares and further sales of newspapers to other owners took place without their participation (Interviews with Ella Agranovskaja and Leivi Sher, 2013).

After a turbulent transition period, relative stability was achieved in the market of Russian-language press by the end of the 1990s. Jakobson pointed out that new journalists, formats and contents of outlets, (*Russkii Telegraf*, *Russkii Potshtaljon*, *ME-Subbota*, *Stolitsa*) etc. have appeared. Due to the economic crisis in the years 1998–2001, the audience's purchasing power decreased and the main tasks of the Russian-language press were to survive, to preserve or find audience and finances (2004: 211). The local Russian language press market reached its peak in number of outlets by 2001 when there were 17 newspapers with a circulation of at least 1000 outlets each.

During this period, the first news portal *Rus.delfi.ee* (1999) in the Russian language emerged. Other news portals in the Russian language began to appear after 2005. Today *Rus.delfi* has 200 000 unique readers per week. The second most popular Internet-portal in the Russian language, *Rus.postimees.ee*, has ca 90 000 readers per week[1].

[1] Estonica.org – Современные русскоязычные СМИ Эстонии.

The period between 2004–2007 in the Russian-language print and on-line markets, which ended with worldwide economic crisis, can be described in terms of concentration of capital. Huge media companies with foreign and Estonian capital – Bonnier Group, Schibsted Media Group, BMA Estonia, Ekspress Grupp – appeared in the Estonian media market. All of these companies also launched Internet news portals on the basis of their newspapers.

The second economic crisis, in 2007–2011, had a drastic impact on the Russian language press landscape and its after-effects can be noticed through today. Both national and local outlets suffered severe fluctuation. Only four national newspapers survived.

The circulation of *Molodjozh Estonii* dropped from 90 000 in 1990 to 8000 by 2001 and to 5900 by the middle of 2008. *Molodjozh Estonii* was not an economically profitable project. It was financially supported by the Onistar company, which produces alcoholic beverages. Financial crisis in the company resulted in the bankruptcy of the newspaper.

Estonija (*Vesti dnja* since 2004) had a circulation of 76 000 in 1990 that dropped to 6400 by the end of 2003. After shifts in ownership in 2004, the paper changed its format and title (Vesti Dnja) and became the representative of the political interests of the Central party[2].

Weekly *Komsomolskaja Pravda v Estonii* started and stopped appearing in 2010 and 2011 respectively.

Simultaneously with the extinction of national Russian-language press there has been an active appearance of on-line news portals, which actually replaced the function of Russian-language national dailies in Estonia. Several on-line outlets were created on the base of existing newspapers (*Postimees na russkom jazyke*, *Den za Dnjom*, *Delovyje Vedomosti*, *MK-Estonija*, *Stolitsa*). The Public Service Broadcasting company launched the Internet-portal *Rus.err.ee* in May of 2007. Tallinn City Government launched their Internet-portal Stolitsa.ee (since 2008) in addition to the weekly *Stolitsa*.

In 2011, among national newspapers, there was one daily, *Postimees na russkom jazyke* (with circulation ca 11600), and two weeklies with general content, one business paper and one weekly which was delivered in the Baltic countries (with circulation between 4 700 and 12 500 each)[3]. The circulation of all six local newspapers was between 1 000 and 40 000 each.

[2] Estonica.org – Современные русскоязычные СМИ Эстонии.

[3] http://www.eall.ee/tiraazhid/2011.html.

There is no national daily published in the Russian language nowadays. Postimees na russkom jazyke has been issued only three times a week since June 2013. Anvar Samost, editor-in-chief, explained that with the shortage of advertisement market[4].

[4] http://rus.err.ee/culture/dcfcc2ad-cc0a-473d-86ec-a6e48558f3f7.

CIRCULATION OF RUSSIAN-LANGUAGE OUTLETS 1998–2013

During the crisis between 1998–2001, two weeklies, in the beginning *Vesti Nedelja Pljus* and *Den za Dnjom*, reported growth of circulation, but the period ended with downturn. Circulation of dailies *Molodjozh Estonii* and *Estonija* was constantly dropping. Only Business Weekly demonstrated quite a stable position on the market, its circulation even grew between 1998 and 2001.

The years 2002–2005 were quite difficult for Russian-language press in Estonia. Circulations of weeklies *Vesti Nedelja Pljus* and *Den za Dnjom* were constantly decreasing. Finally *Vesti Nedelja Pljus* stopped appearing in 2004, *Den za Dnjom* – in 2005. Weekly (and brand) *Den za Dnjom* was saved by Schibsted which purchased this paper. In 2006, the weekly *Den za Dnjom* appeared again with a circulation of 17 000 copies. During this period, circulation of dailies *Molodjozh Estonii* and *Vesti dnja* increased, decreased and finally ended with bankruptcy in 2007.

In the years 2005–2006, two new newspapers were launched in the Russian language press market: weekly *MK-Estonija* and daily *Postimees na russkom jazyke*. They both started quite successfully, but then circulation began to drop. Most remarkable was the continued drop of circulation of *Postimees na russkom jazyke* while weekly *MK-Estonija* managed to increase its circulation in years 2009–2012.

Business weekly *Delovyje Vedomosti* has a relatively stable position. This can be explained by the fact this paper has a stable readership, whose income is quite high. However, its circulation has still decreased in last two years.

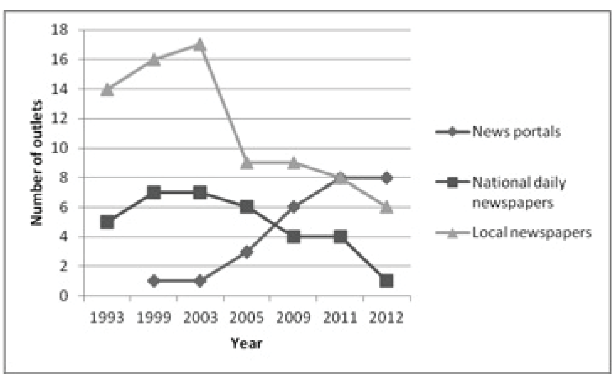
A major trend is that circulations of all print-presses have been decreasing since 1998. Dailies are in the most vulnerable position whereas weeklies have a more preferable situation. It is obvious that production of dailies is not profitable, especially with the active appearance of Internet-portals since 2003 (See *Table 1*).

Table 1. Circulation of Russian-language outlets 1998–2013 (in thousands). Source: www.eall.ee.

	1998	2000	2002	2004	2006	2008	2010	2012
Molodjoz 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	21.2	23.5	19.9	16.1				
Den za Dnjom	16.7	19.4	18.6	14.5	17	13	13.2	10.4
Delovyje Vedomosti	4.8	4.8	5.1	5.3	6	5.8	4.8	7
Molodjoz Estonii Subbota	9.9	7.1	10.3	11.3	11.5			
MK Estonii					14.3	11	11.1	12.9
Postimees na Russkom Jazyke					17.1	12.3	11.5	9.6

Tallinn's local weekly newspaper *Stolitsa*, with the largest circulation of 40 000 outlets, is published by the Tallinn city government and delivered for free via subscriptions and special newspaper-boxes in Tallinn. This paper shares the political views of the Central Party which governs Tallinn and is oppositional on a parliamentary level. In recent times, it has became a considerable player in the Russian-language press market because of the shortage of Russian-language press and its free availability. Therefore one can notice that political and economic benefits of the newspaper and news portal *Stolitsa* are intertwined and serve the interests of Tallinn city government.

Figure 1. The trends of the development Russian-language press and on-line outlets market 1993–2011.



It is obvious the Russian-speaking population still prefers to consume information in Russian language and this trend will continue in the future. According to Integration Monitoring 2011 ca 50 per cent of Russian-speakers cannot follow media (print, online, radio and television) in Estonian because of insufficient knowledge of the language[5].

[5] http://www.kul.ee/webeditor/files/integratsioon/Intmon_2011_pt_5.pdf.

LICENSING OF BROADCASTERS: FIRST RUSSIAN-LANGUAGE BROADCASTERS

Until the beginning of the 1990s, the main TV channels that broadcast in the Estonian territory were Estonian Television (ETV) and three channels from Russia: Ostankino TV, Russia TV (both re-transmitted from Moscow) and Leningrad TV. The re-transmission of all Russian television and radio channels (Majak, Junost) was terminated in 1993–1994. 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 targeting speakers of Russian was established. The market demand for programmes in Russian was met by cable operators who rapidly expanded their networks and started to re-transmit Russian channels available on satellites.

The primary objective of the first Broadcasting Act (RHS, 1994) passed in Parliament in 1994 was to establish a dual media system; the co-existence of PSB and a commercial sector. The former State Radio and Television Committee was reorganised into two independent public service institutions: Estonian Radio and Estonian Television. Licenses for private broadcasters were issued through public tenders.

In order to ensure political consistency and awareness of the Estonian population, Director General of Estonian Radio Peeter Sookruus (1991: 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. The following period shows that this proportion – one of four – was achieved in public service radio in 1993 when, in addition to the three programmes in Estonian, a Russian-language programme was launched.

Table 2.
Number of radio channels in Estonia. Source: Ministry of Culture.

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

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 new 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 development of media space. In the context of this article we can point out two important general criteria in the terms of licenses issued. First, the requirement that in the broadcasting organization, Estonian capital must have at least 50 per cent of the votes, and secondly, the requirement that Estonian authors' work share must be at least 35 per cent of the daily output of a radio program.

The first three radio licenses were granted by the Minister of Culture on 21 May 1992 to the newly created private companies (AS Trio and AS Rumor) and a municipality (Viljandi county administration's office of culture). National Estonian Television and Radio received their broadcasting licenses three weeks later. The first private TV license was issued to a local entrepreneur (AS Alo TV) on 8 June 1992.

From the total of 29 broadcasting licenses issued in 1992, there were nine for television and 20 for radio. The language requirement was not shown separately in any of them. Programmes in Russian were produced and aired by Estonian Television, Estonian Radio, by private AS Reklaamitelevisioon, Orsent TV and by one AS Trio radio channel. The first three broadcasted some output in Russian within Estonian programmes. Orsent TV's full offer was in Russian and was targeted at a Russian-speaking audience, but in total they broadcasted only around six hours weekly. In their license application to the Supreme Council of Information and Journalism Commission, Orsent described the aim of the channel as an endeavour to contribute to the integration of the local Russian minority into Estonian and global culture[6]. In the application submitted, Orsent declared they intended to produce and transmit broadcasts three hours a week in the Tallinn area only (the same frequency was also used by AS Reklaamitelevisioon for broadcasting their programme RTV). Orsent's application was accepted and they were given permission to air programmes no less than three and not more than ten hours per week on Tuesdays, Thursdays and Saturdays after the end or before the start of RTV's program. Although the channel had a small output of hours, and programmes were aired on inconvenient time for viewers, Orsent must be counted as the first free-to-air television station broadcasting for a Russian language audience. Nowadays, Orsent has their own channel and is transmitting considerably more programme hours which are viewable over cable networks. Unfortunately, Orsent's audience figures were, and still are, very small, which again was a reason for low revenues and minimum profitability. The station never became an important platform and voice for the Russian-speaking audience.

[6] AS Orsent. Application letter. Ministry of Culture (March 9, 1992).

AS Trio launched Raadio Tallinn as the first legal[7] Russian-language private radio station in autumn 1992. The station started broadcasting at a UKV frequency and later transferred to FM.

[7] In the beginning of the 1990s, Soviet-minded Radio Nadezhda functioned on the territory of Soviet Army's Keila Tank Regiment. This station had neither the permission to use radio frequencies of the Estonian Republic nor broadcasting licence. Radio Nadezhda closed along with the departure of Soviet armed forces from Estonia in 1994.

In the spring of 1993, Estonian Radio launched Russian-language broadcasts on an FM frequency, which rapidly evolved into a full-time program, Raadio 4. The same year, 20 private broadcaster licences were issued (5 for TV and 15 for radio). Out of those, 2 were issued for broadcasting in Russian language. The national company Viru Information Centre was given permission to broadcast through a radio relay network and AS Trio to expand the coverage of Raadio Tallinn (later known under the names Raadio 100 FM/ Narodnoje Radio) to Eastern Virumaa. One local TV broadcaster – EMPI TV – was issued temporary licences for broadcasting in Kiviõli.

In the spring of 1994, AS Narva Televisioon and Sillamäe Municipal Information Centre obtained licences. The applications to launch both TV channels were also supported by local authorities. The political motives were also important for these municipalities, at the same time being minimal or non-existent for the owners of Estonian-speaking broadcasting organisations. Ensuring '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.

With the passing of the Broadcasting Act in the summer of 1994, all current licences became invalid and 32 new five-year broadcast licenses were issued in tight competition. Estonian Radio and Estonian Television did not need to apply for broadcasting licences anymore, as they now functioned according to the rules set in Broadcasting Act. The already active Russian channels Narva Televisioon, Orsent TV and Raadio Tallinn were granted new licences. Similarly to Orsent, Narva TV was given broadcasting time only on certain days of the week before or after the programme of the main channel. They were given permission to broadcast 7.5 hours a week. By now, Sillamäe and Narva TV channels have stopped working.

1995 saw the continuation of expansion of private broadcasters. 19 new radio and 1 TV licences were issued. Only one of those – Narva Päikeseraadio, owned by Mediainvest AS – aimed to broadcasting Russian radio programs.

1996–1998 saw a decrease in the number of broadcasting licences issued due to the shortage of free frequencies. A total of 13 licences were issued in three years. Among those was Taevaraadio AS-owned Raadio Sky Klassik, originally intended to broadcast classical music, that was renamed Russkoje Radio in 1998 and started Russian broadcasts. Under new conditions, original Russian programme produced or acquired for this station had to be aired during daytime (between 7:00 and 20:00). The majority of the programme was to be Russian music; at least 15 per cent of the day's programme had to be speech.

In 2000, the conditions of this broadcast licence were mitigated and the requirements for speech and Russian music broadcasts were dropped.

Eesti Sõltumatu Televisioon AS started with TV1 programmes in 1997. The broadcast licence issued to TV1 stated that the programme had to include at least 30 minutes of news in Russian every day. TV1 did not do that. There were only 5 minutes of news in Russian per day and these were broadcast at 23:30 or later. The Ministry of Culture gave two warnings to TV1 for the violation of their licence. Despite promises (TV1 letter to Ministry of Culture 14 Sept 1998) TV1 did not manage to produce and broadcast Russian language programmes in bigger amounts before their bankruptcy.

In the 1990s and even during some years after the millennium, other Estonian commercial channels had a business-driven aim to maximize their audience by offering Russian-language programmes on certain time slots. This kind of limited offer was unsuccessful in commercial terms and audiences were attracted by channels of the Russian Federation.

In 1999–2002, most of the valid five-year broadcast licences were renewed. No terrestrial TV channels were created. There were 12 cable TV licences issued in 2001, out of which five belonged to the operator AS STV and targeted Russian audience. Also AS Nom's programme Infokanal was aimed at Russian viewers.

In the field of radio, there were 24 newcomers, most of them either replacing closed down programmes or reflecting a change and consolidation of owners. Local studios were shut down and instead of their own programmes, centrally produced programmes were aired over the networks. The roots of this process were in affordability – in smaller regions there was not sufficient (advertising) money and human resources to produce and air so many local programs. The Tartu Pereraadio Ühing-owned Christian radio station operating under international broadcasting licence Semeinoje Radio (later Radio Eli) and AS Trio LSL-s Russian music Radio Katjusha started Russian broadcasts in 2000.

In 2004, the list of Russian radio stations was lengthened with Russkoje Radio Tartu, Euro FM, Raadio DFM and AS Trio LSL's Raadio

Uuno Pluss Dynamit FM. The licence conditions for most Russian-speaking radio stations were even more laconic than before, usually including the requirement to broadcast local news (that can be produced in cooperation with several broadcasters), cover local life and contain a 20 per cent ratio of Estonian authors in their daily programme.

During 2004–2008 there were just few new TV licenses given. All of them were local. OÜ Lites LT started the programme LiTeS in Eastern Virumaa in 2004, MTÜ AB Video started the programme TV-N in the cable network of Harjumaa and Tallinn in the end of 2006 (nowadays it is available all over Estonia). And in 2008, SA Lastekaitsefond's programme LNTV was launched, which showed mostly cartoons over a couple of years' existence.

The spread of Russian-speaking radio and TV programmes follows the location of Russian-speaking communities – most broadcasters are active in Tallinn, Eastern Virumaa and Tartu. The content regulation of all media service providers is minimal according to Estonia's liberal media policy. This and the smallness of the advertising market have resulted in the cluster of music radio channels mostly playing mainstream music and TV channels mostly showing feature films.

Out of 29 radio licences, 8 were given to broadcast Russian-language programmes, while Raadio 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, the linguistic distribution of population as drafted in the 1990s, where there are three Estonian radio programmes to one Russian one.

There are 14 valid TV licences in Estonia as of 1 July 2013. Three of those – Orsent-TV, TV-N ja LiTeS – are targeted to Russian-speaking audience. With the widespread use of cable networks and IPTV in the living areas of the Russian-speaking population these programmes are now easily accessible. At the same time, they are not as popular as Russian TV programmes (see thereinafter). 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 2*).

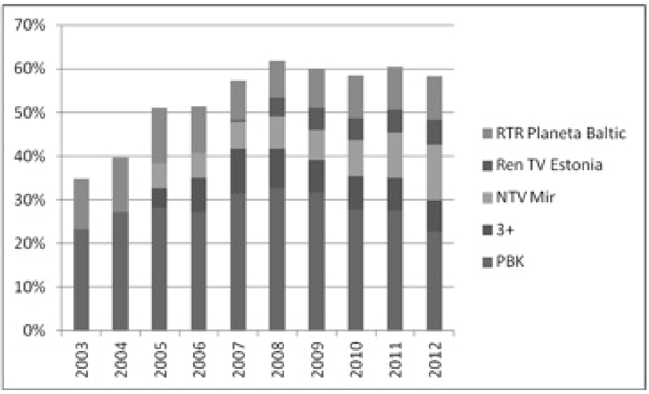


Figure 2. An evaluation Russian-speakers' share of viewing of the main Russian language TV channels. Source: TNS Emor.

The most popular TV station among Russian speakers is Pervõi Baltiiski Kanal (First Baltic Channel, PBK), which is owned and operated by a Latvian independent legal entity working under two jurisdictions, a broadcasting license issued by LNRT Latvia and by OfCom U.K. The PBK programme is available in all Baltic countries on all technical platforms: satellite, cable, IPTV and DTT pay TV packages. It primarily re-transmits the Russian commercial TV channel 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*), which is scheduled immediately after the latter on prime-time.

Based on these facts it can be said that a big part of Russian-language Estonian population is mainly following Russian television channels and is therefore more integrated into the Russian information field than into the Estonian one.

ECONOMICS – FINANCIAL RESULTS OF MEDIA: MINORITY LANGUAGE AUDIENCE AS A MARKET FAILURE

The third influencer of the 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 – Nordic media companies generally became the owners of these enterprises. Norwegian Schibsted AS 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 Reklaamitelevisioon that later merged with EVTV to form TV 3, 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 Estonian media sector was to gain profit in a newly opened market.

Contrary to the Estonian market, no foreign investments came to Russian-language media. Media channels were owned or created by local non-Estonian entrepreneurs. Unfortunately, they 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 the potential market, foreign capital did not have any interest in contributing to this narrow sector. Taking into account Russia's close foreign countries policy, Russian money could have come to the Estonian media sector with political aims. This however did not happen, at least not in the extent to start and keep up 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 capital from either East or West 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 changed owners frequently. In several cases the official financial results were not declared. As an example, the financial standing of the newspaper *Den za Dnjom* by the 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 the 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 and the financial results of the newspaper are no longer available separately (see *Figure 3*).

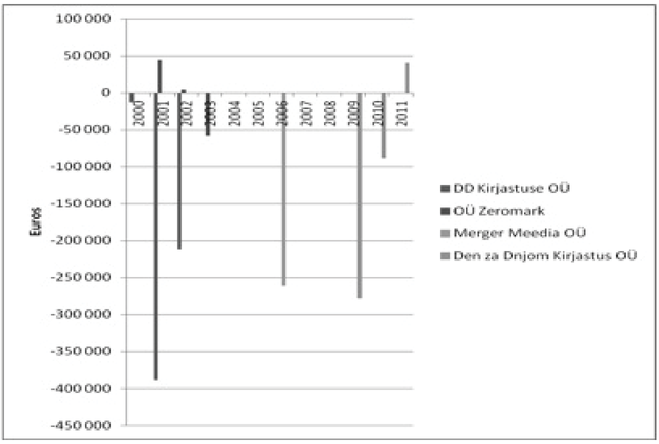


Figure 3.
Profit and loss of newspaper Den za Dnjom publishers. Source: e-Business register.

In comparison with the financial results of the two biggest private TV channels (see *Figure 4*) the turnover of Russian-language broadcasters follows a similar pattern (see *Figure 5*). There is nevertheless a difference in the profitability of the channels. As the main source of income for major TV channels is advertising sales, the economic crises atn the end of the 1990s and beginning of 2008 influenced their income far more than that of small companies functioning on project support.

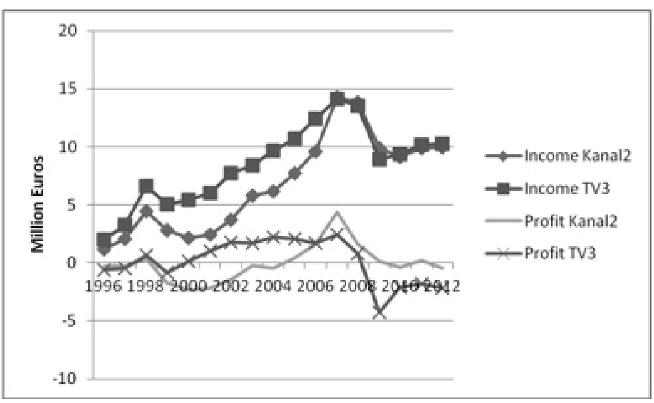
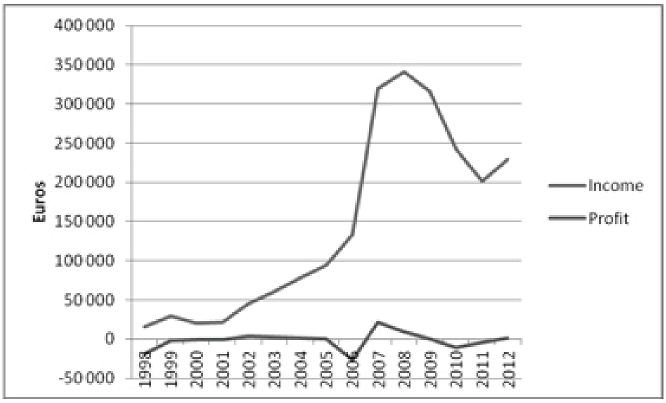


Figure 4.
Financial results of TV3 and Kanal2. Source: e-Business Register.

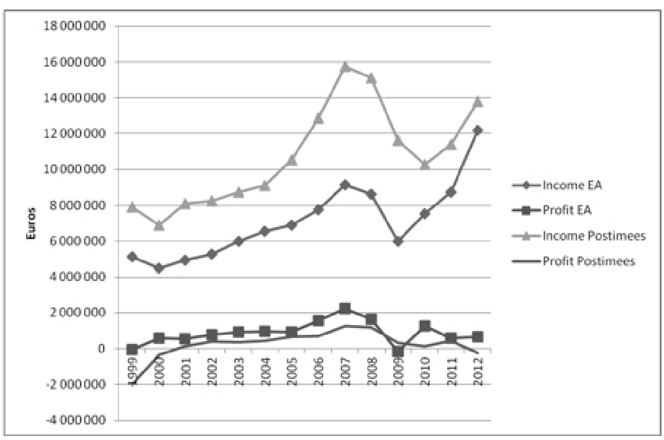
While the financial results of Estonian-language media companies can usually be found in official databases from the mid-90s to the present, the same information regarding Russian-language publications is incomplete in the national register. Despite that a general trend in Russian-language printed media can be pointed out – this is the decrease in income.

Figure 5.
Financial results of Russian languages TV-channels. Source: E-Business Register.



Comparison of financial results of the two biggest newspaper publishers (see *Figure 6*) and Russian-language newspaper publisher (see *Figure 3*) in Estonia indicates a magnitudinal difference. The same difference occurs when financial parameters of Estonian commercial TV channels (see *Figure 4*) are compared with the Russian languages' TV ones (see *Figure 5*).

Figure 6.
Financial characteristics of media companies Eesti ajalehed (EA) and Postimees. Source: E-Business Register.



Differently from the Russian languages 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 programme in Estonia.

The private sectors' unwillingness to work for these niche audiences is understandable from a 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 the 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 (see *Figure 7*). 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 economical situation deteriorated dramatically.

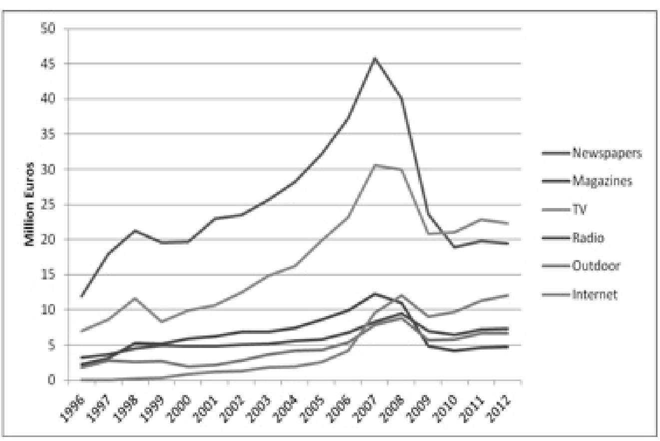


Figure 7.
Estonian advertising market value. Source: TNS Emor.

ROLE OF PUBLIC SERVICE BROADCASTING

When all circumstances (resources available, market conditions, economical atmosphere, etc.) are not favouring commercial media then this kind of market failure should be balanced by public service media (PSM). Therefore PSM is even more responsible for delivering diverse content and high-quality information for all citizens, including minorities, on a smaller market. Despite fast and large changes in the media, public service media still has an important role to play in the public sphere from this point of view.

This argument is supported by the broader definition of public service broadcasting (evolving into public service media). Public service broadcasting (PSB) is defined by McQuail (2010: 569) 'as the system of broadcasting that is publicly funded and operated in a non-profit way in order to meet the various public communication needs of all citizens'.

In other words – PSB's ultimate function is to serve public interest. In normative criteria this is described as enhancing, developing and serving social, political and cultural citizenship; being universal with high quality standards (Born and Prosser, 2001: 671).

The justification for PSB existence is to serve public interest. According to McQuail (2010: 568), public interest 'expresses the idea that expectations from, and claims against, the mass media on grounds of the wider and longer-term good of society can be legitimately expressed and may lead to constraints on the structure or activity of media'. Critics of PSB declare that public interests are also served by commercial broadcasters and PSB rationale no longer exists (Jacka, 2003). On the other side, scholars are convinced that PSB is needed more than ever in new, rapidly changing, communication contexts (Murdock, 2005). It might be a case that commercial broadcasters are fulfilling some public interest tasks, but mainly only these, which are commercially profitable, unprofitable services are (most likely) left out of scope. Jakubowicz (2007c) argues that the underlying aims of public service broadcasting are still to enhance culture, promote education, maintain social cohesion and strengthen democracy. For successful fulfilment of these four criteria, PSB needs to have sufficient resources (human, financial, technical etc.) and favourable legislative framework.

Researches made by Lauristin (2004; 2009), Lauk (2008), Lõhmus et al. (2010) underline the special role public service broadcasting carries for small countries like Estonia. It is especially important, in markets where private broadcasting is commercialized, that PSB maintains its role as the reliable provider of trustful sources of information. PSB's important role in the public sphere to substantiate, support for democratic development and pluralism are described as crucial ones. All these factors have direct influence on society and citizens. Enhancing democracy and cultural heritage, improving social cohesion, developing 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, overall development of democratic society is under serious threat.

EUROPEAN UNION MEDIA POLICY IMPACT ON PUBLIC SERVICE MEDIA

On the EU level there are no tools or mechanisms dictating a minimum PSB quantity or quality level a Member State should guarantee for citizens. There is no binding legal EU regulation towards PSB. There are no European Union's financial instruments, for example solidarity funds for infrastructure development, dedicated for the enhancement of public service media. Decisions on remit, funding model and funding level of PSB are totally left to Member States. There is no common PSB model or standard which applies to all countries (European Commission, 2011). Governance and financing models, remit, legal framework and relations with political powers, accountability obligations towards society, etc. vary a lot. But overall, EU media policy is subordinate to economic policy and the public service media is treated in a similar manner to any other industry (Harcourt, 2005; Jõesaar, 2011). In a similar way to other industries' regulations, media regulations are shaped by market forces in a large extent. The result of a liberal regulatory process is that media will be more and more commercialized. As shown by Lowe et al. (2011) and Jõesaar (2011), in the poorer, smaller states commercial media tends to be more entertainment oriented than in smaller, wealthy states.

To balance entertainment biased commercial media, PSB should have strong and interesting own-production, which is more costly than mass production acquisition programs. This results in the conclusion that for strong PSB, the PSB funding on small markets should be on a relatively higher level than on large markets. In reality the situation is opposite. The level of available funding is (an immediate) cause for PSB performance. It gives reason to assume that sufficient funding will support high quality production which is needed to attract an audience. In the case of Estonia, there actually exists two main audiences – national language speakers and Russian speakers. This means that for serving both communities in the best way, a double amount of funding is actually needed. It is evident that private media is not able to serve Russian-language citizens on a proper level. There is no nationwide daily newspaper nor full-scale TV-channel in Russian; Russian language music radio stations are oriented on entertainment of young audiences; newspapers in Russian have a very moderate penetration.

In the case of Estonian Public Broadcasting (ERR), the question of serving minorities has been debated for a long time (Jõesaar and Rannu, 2013). The idea to increase ERR output in Russian on all media platforms, especially in television, has not received political support and because of that is heavily under-financed. Therefore television programmes offered in Russian still do not have the critical mass to attract its target audience in a large scale. Only the Estonian Public Broadcaster's nationwide radio programme in Russian, Raadio 4, is offering quality journalistic content for a Russian-speaking audience.

The next part of this article focuses on Russian language TV-programme of Estonian Public Broadcasting.

PSB'S TRADITION OF RUSSIAN LANGUAGE PROGRAMMING

The next section of the article will focus on PSB programming for minorities. Soviet-era ETV produced news and primarily cultural and educational programmes in Russian during the 1960s and 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 informational 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. Even the topic of ethnic minorities was subsequently raised by Estonian-speaking journalists, after the founding of The Union of Estonia's Nationalities in 1988.

From 1990, with the exception of news, the 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 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 productions 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 the volume of Russian language programming rose above 200 hours in 1998-1999, when over 10 different series' were aired on ETV (Trapido, 2000: 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 on 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).

After the crisis, it was primarily the production of the news that continued to be financed from ETV's budget of the original Russian programmes. The remainder of the in-house productions 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.

A budgetary crisis in ETV in 2000–2002 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-productions between independent producers and ETV employees; 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 (Ajutrust Konsultatsioonid, 2007).

TODAY'S CHALLENGES FOR PUBLIC SERVICE MEDIA

Public service Raadio 4, once the indisputable leader among Russian-language radio stations, is still a leader, but the listening trend is clearly negative (see *Figure 8*). Commercial music radio stations are gaining market share. It will be challenging for PSM to retain its position in the Russian language radio market.

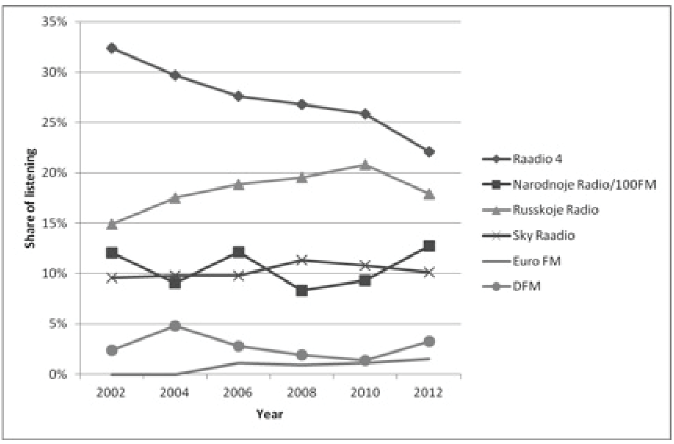


Figure 8.
Russian language radio stations share of listening. Source: TNS Emor.

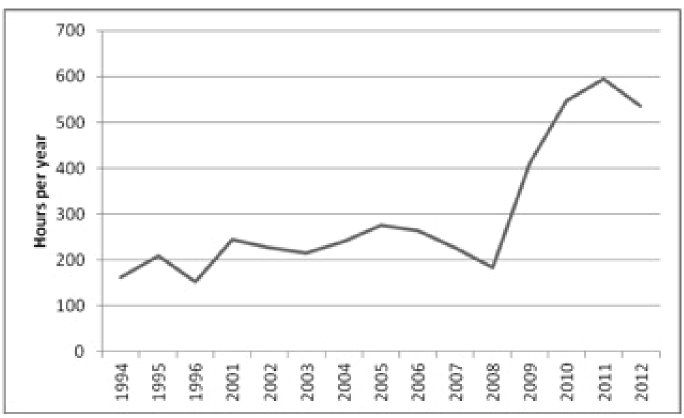
Estonian Television's position among the Russian-speaking audience is even more complicated. The launch of the PSB Russian language channel, ETV2, has been debated for almost two decades. It has been mentioned in parliamentary debates and has been part of a number of PSB's development plans. A short 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 it will attract the atten-

tion of the Russian audience due to 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.

In 2008, another economic downturn forced 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 (see *Figure 9*). Only one series was produced for the Russian audience, which also received funding from external sources. Despite the lack of funding, ETV2 started broadcasting in the summer of 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, new in-house production is minimal, primarily consisting of original children's programmes, which also have an important role in ETV2.

Figure 9.
ETV's yearly total programme hours targeted at the Russian-speaking audience. 1994–1996; 2001–2010. Source: Authors' calculation.



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 and some information and discussion programmes scheduled for Russian speakers, today exists on ETV2. The decline in 2012 was caused by the cut in the production of original programming in Russian (see *Figure 9*). In 2012, ETV's channels occupied only 1.8 per cent of the viewing time of non-Estonians (TNS Emor).

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-language news lost some of its viewers. Since 2010, the news is repeated on MTG channel 3+, but the audience remains quite small.

Despite all these ERR efforts, it is not efficient enough to attract the Russian-speaking audience and integrate them into the Estonian information field.

DISCUSSION

After the regaining of Estonian independence, the following presumptions were applied to establishing Estonian media system politically, economically and technically regarding the Russian-language population:

> 1. Domestic Russian-language media does not need national support because the Russian population will decrease because of emigration and those remaining will acquire sufficient language skills to be able to follow Estonian media to satisfy their information needs.
>
> 2. Free market principles in media will provide a solution for the issues of informing and integrating language minorities without specific state-initiated regulations.

These presumptions proved only partially right in reality. The Russian-speaking population is decreasing and their Estonian language skills are improving but only 14 per cent of them prefer Estonian media. Domestic Russian-language media is preferred by 21 per cent of non-Estonians. 2/3 of Russians consider the media channels, mainly television, of the Russian Federation more important for themselves (Vihalemm, 2011). The end of transmitting Russia's TV channels in the beginning of 1990s brought along an explosive spread of cable TV in Russian-speaking residential areas in Estonia, thus transferring viewers to Russian-language satellite channels within a few years. In the market economy situation, Russian-language printed media has undergone a severe decline, resulting in the cessation of publishing national daily newspapers. Weeklies and local newspapers have fared slightly better. Private enterprise has shown considerable ability in developing radio and Internet media; private TV channels, however, have desisted from engaging a Russian-speaking audience after short-timed attempts. Public broadcasters have been relatively successful in developing Russian-language radio, while TV programmes are confined to broadcasting Russian-language news and translating Estonian programmes into Russian because of lack of resources.

In broadcasting, this has resulted in a situation where two communities are influenced by different independent information fields; Estonian-speakers (mainly) receive daily information from national broadcasting channels, while Russian-speakers receive such information from Russian Federation TV stations and global TV channels. This could be acknowledged, if the Russian population's strong beliefs towards foreign television channels did not constantly raise problems with regard to their participation in Estonia's everyday life and the degree to which they are informed about this. It has been hoped that one solution could be the target ordering of specific Russian television series' on themes of integration, but their audience is more Estonian- than Russian-speaking. The reasons for this lie in the contents of the broadcasts, as well as in the environment. Media research has claimed that the Russian-speaking audience views itself more like integration objects than subjects in these shows. This is not useful, as it decreases the attractiveness of the programmes. As a rule, these programmes are aired on Estonian-language ETV channels in flexible volumes and slots. Therefore, the Russian-speaking audience has not developed a viewing habit. No agreement has been reached on the strategies or funding of the development of Russian language television programming. Therefore, there is no reason to believe that anything will change in the (near) future, unless there is a substantial increase in the Russian programme funding that is required for the production of high quality programming on a considerably larger scale.

CONCLUSIONS

When observing the development of Russian-language media in Estonia after the country regained its independence, its political, economic and technological influencers, it can be seen how a market failure occurs in an important sector of everyday life of a small country, resulting in linguistically different population groups ending at different information fields. These information fields are separated not only by linguistic but also notional national borders.

It must be admitted that such division has its roots in the Soviet era when non-native populations, settling in USSR's republics, consumed mostly pan-Soviet media – newspapers, magazines, TV and radio that were ideologically and economically strictly controlled by the central power. Establishment of liberal media principles in re-independent Estonia ended undemocratic supervision and gave media independence. One of the prerequisites to this was economic independence that subjected to free market principles only. However, to Russian-language media in Estonia, free market 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. 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.

Domestic Russian-language broadcasting in Soviet Estonia limited itself to some educational and cultural programmes as the only national TV channel, while the choice of programming at pan-Soviet TV channels was abundant. A number of Russian-language TV channels were created after the end of re-broadcast of Soviet TV programmes with the hopes of making a profit from the advertising market. Unfortunately, broadcasting such channels was limited. Therefore the amount of viewers was not considerable enough to rouse the interest of advertisers. In addition, satellite TV offered fierce competition, making Russia's TV channels accessible to the Russian-speaking audience in Estonia. 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.

Estonian Radio was successful at launching a Russian-language radio program. Estonian Television had one Estonian-language channel only, where the Russian-language slots did not find viewers, and the political agreement to launch the second channel was not reached. 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 program.

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