

## ŽINIASKLAIDA IR KOMUNIKACIJA

### PSM – home alone in a narrowcasting era? A case study: the Estonian public broadcasting

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*This article aims at exploring the ways in which the Estonian Public Broadcasting (EPB) tackles challenges of modern public service media (PSM) companies, how different external and internal factors (especially politics, economics, and technology) encourage or hinder the (online) evolution of Estonian Public Broadcasting. Starting with McQuail's (2010) theoretical framework of media institutions' influencers, the article investigates how the media policy, economic conditions and technology changes have influenced these processes (Doyle, 2013; Picard, 2011). Also, broadcasters themselves have taken different approaches towards their role in the new media environment (Doyle, 2010; Ranaivoson et al., 2013). Traditional PSM remit should be kept up to date with the demands of information society (Lowe et al., 2014; Bardoel and d'Haenens, 2008). This is a fundamental challenge to the funding and governance of PSM. Market pressure to reduce the PSM funding makes the expansion into online media difficult. However, audiences, especially younger ones, abandon traditional broadcasting channels and are attracted to the online world. This article analyzes different aspects of the the adjustment of Estonian Public Broadcasting with media changes and trends and the outcome of this process. The aim of the research is to give an answer to the question: How do different external and internal factors (especially politics, economics, and technology) encourage or hinder the development of the Estonian Public Broadcasting?*

**Keywords:** public service media, Estonian Public Broadcasting, media policy

#### Introduction

This article aims at exploring the ways in which the Estonian Public Broadcasting (EPB) tackles the challenges of a modern public service media (PSM) company, how different external and internal factors (especially politics, economics, and technology) encourage or hinder (online) the evolution of Estonian Public Broadcasting. Starting with McQuail's (2010) theoretical framework of media institutions' influencers, the article investigates how the media policy, economic

conditions and technology changes have influenced these processes (Doyle, 2013; Picard, 2011). The overall broadcasting paradigm is changing (Bardoel and d'Haenens, 2008; Croteau and Hoynes, 2014; Lotz, 2007). Powered by the fast technological development, convergence, globalization and commercialization, the emerging social media have challenged all traditional media models (Candel 2012; Jenkins 2008). Depending on the political will, changes in the media politics towards a new media

paradigm can be public-service media supportive or limiting. In times of the increasing market pressure and changes in the ways how the media are consumed, securing the quality, diversity and pluralism of the available media content on all platforms needed for democratic societies should be a task of the communication policy. At the same time, several researchers claim that (at least in broadcasting) the communication policy's dominating value is the economic welfare (Picard, 2002; Croteau and Hoynes, 2012).

Also, broadcasters themselves have taken different approaches towards their role in the new media environment (Doyle, 2010; Ranaivoson et al., 2013). Traditional PSM remit should be kept up to date with the demands of information society (Lowe et al., 2014; Bardoel and d'Haenens, 2008). This is a fundamental challenge to the funding and governance of the PSM. Market regulation is rapidly overcoming state regulation and dominating the media policy discourse (Sussman, 2003). Market pressure to reduce the PSM funding makes expansion into the online media difficult. However, audiences, especially younger ones, abandon traditional broadcasting channels and are attracted to the online world. For reaching all fragmented audience groups on all platforms, new strategies must be introduced. For providing high-quality PSM, extra investments into the information-technology, the personnel and of course into the content are unavoidable. This article analyzes different aspects of the adjustment of the Estonian Public Broadcasting with media changes and trends and the outcome of this process. The aim of the research is to give an answer to the question: How do different external and internal

factors (especially politics, economics, and technology) encourage or hinder the development of the Estonian Public Broadcasting?

### **Local view on the European public service broadcasting regulation basics**

Public service broadcasting (PSB) – evolving into the public service media – has, in spite of the fast and large changes in the media, still an important role to play in the public sphere. The main functions of PSB have remained the same as described by John Reith: to inform, educate, and entertain (Reith, 1924).

Jauert and Lowe (2005) describe four cultural functions of public service broadcasting:

- 1) Beneficial social agent
- 2) Essential civil society organization
- 3) Robust discursive medium
- 4) Democratic mediation for intercultural communication.

From the perspective of the European Council, public service functions can be described as follows:

- 1) Reference point as a factor for social cohesion
- 2) Should serve both broad audiences and minority groups
- 3) Forum for public discussion
- 4) Source of impartial and independent information
- 5) Should promote different ideas and beliefs, create mutual understanding.

The Council of Europe declares that for democracy and pluralism in member states a strong and independent public service broadcasting is needed (CoE, 2009). The ways and means to achieve this task are

left to the member states to decide. Member states' accordant decisions are shaped by the European Commission's liberal market policy, which is mainly aiming at the common market and free competition (Harcourt, 2005). Jõesaar (2011) argues that a simplified approach towards the European Union media policy can be described from two angles. On the one hand, the role of EU media policy is a secure media system to promote pluralism, democracy, social cohesion, and the freedom of expression. On the other hand, the commercial interest of (private) stakeholders and common market regulation must be guaranteed. The political-administrative system sees economy (incl. media economy) foremost as liberal and needing as little regulation as possible; at the same time, regulation is necessary to guarantee the public sector media (broadcast) activities. The basis of this conflict is the scarce legitimacy of the PSM in the political-administrative system. In the Estonian liberal market economy (Bohle and Greskovits, 2012; Buchen, 2007) the scarce legitimacy is expressed through the insufficient Estonian Public Broadcasting (EPB) funding (Jõesaar 2011). The article elaborates on the funding issue later on.

### **Broadcasting and telecommunications industries**

As stated earlier, all media institutions are influenced by economics, politics, and technology (McQuail, 2010). Due to the influences, the media are in permanent change (Hallin, 2008). Not to lose the momentum, traditional broadcasters are looking for new fresh program creation ideas (Hesmondhalgh, 2013). This is a business as usual.

Content was, and still is, the key. In addition to that, during the last decade, the content distribution related issues have gained importance – on what platforms, with which technologies and devices the content should be distributed and consumed (Bennett et al., 2013)? Today, it is not even enough just to deliver the content on different platforms, but broadcasters themselves must act as active receivers and interpreters of the messages created by the audience (Jenkins, 2008). How to find a right balance between content creation, distribution, and the interaction with the audience is a strategic question (Bennett et al., 2013). The chosen strategies are open for internal and external debate. All moves broadcasters are making should be well justified and explained to the public. Public service broadcasting is accountable for every detail (Bardoel and d'Haenens, 2004). When the public money is involved, everything should be substantiated, measured, and valued. At the end, all strategies are formulated through budgets. So, in one way or another, all these questions at some point will end up as a budgetary item, cost location. From the accountability perspective, finances are easy to count. The main valuation criteria of broadcasting as a business have remained the same – revenues and costs, profit and loss, return on investments, shareholders' value, and so on (Picard, 2011). One simple financial criterion which gives us the possibility to benchmark broadcasting companies against each other and also to compare the media to other industries is the operating revenue. In the European main 'convergent players' TOP40 list, the ARD was on the 37<sup>th</sup> and the BBC Group on the 38<sup>th</sup> position (EAO,

2014). Both have the operating revenues above 6 billion Euros. Samsung Electronics (the operating revenue above 150 billion Euros), Apple Inc, and Tesco are the TOP 3. Here, the term ‘convergent player’ marks common interests in the media field. This comparison shows that the operating revenues of the main broadcasting institutions are much smaller than the operating revenues of the main telecommunications and internet companies. Actually, there is nothing new. Turnover of telecommunication incumbents has been always much bigger than of the public service broadcasters. Twenty years ago, the difference in Estonia was eleven times; today, the ratio is 1:15 (e-Business Register 2014). So, the question here is not so much about the money, it’s a question about adaption with the new paradigm. During the last thirty–forty years, there has been a fierce competition between commercial and public broadcasters. Today, the main question is not about the commercial revenue driven conflicts inside the broadcasting industry or about the PSM funding rationale. Of course, these disputes have not disappeared, and many questions are still open, but the main tensions are lying now between the broadcasting and the internet companies. The question is who controls the content, ways and terms of content delivery and (through access) the whole audiences. It is not only the question of PSM remit and mandate, but it is the question about the valuation and development of the whole broadcasting industry. Broadcasters are pretty much stuck with the traditional one-to-many communication model. The Telcos, who mainly dealt, and to a large extent still deal, with one-to-one

communication are taking over new areas – including many-to-many and one-to-many communication. Hence, telecommunication and internet companies have become, or soon will be, the dominating stakeholders in the media business. All this is supported by the technical evolution. Two decades ago a mobile phone was a luxury item, most advanced early adaptors were used via dial-up first emerging internet services like e-mail and web directory. Today, the emerging social network services and smartphones / tablets occupy people’s daily lives. Literally, the audience are almost all the time online (Ofcom, 2014). The GSMA (2013) report estimates that in 2014 there will be more than 200 million smartphone users in Europe. In many countries, smartphone penetration is already over 50 per cent. In 2015, a raft of other countries, will make the majority smartphone jump. Figures released by eMarketer (Skelton, 2014) predict that the number of tablet users in the EU5 countries (France, Germany, Italy, Spain, the UK) will exceed 100 million by the end of 2014. Figures are expected to increase to almost 150 million by 2018. The rate of tablet penetration is increasing across the whole of the EU. The figures predict an overall penetration rate of 31 per cent by the end of 2014, increasing to 44 per cent by 2018 (GSMA, 2013; Skelton, 2014). Captivated by this trend, some people say that the old media will die. Jenkins (2008) states that, as shown by history, the old media never die. What dies are simply the tools – delivery technologies – used to access the media content. But, as stated earlier, the truth is that the media paradigm has changed. The proliferation of media services and service providers is continuing. According to the latest data

from the MAVISE database (2014), today in 40 European countries there are 11428 television channels, 3641 on-demand audiovisual services – consisting of more than a thousand of catch-up TV services, close to a thousand branded channels of broadcasters on open platforms, and hundreds Video-on-Demand film services – in 40 European countries operated by 8487 companies (broadcasters, packagers, transmitters) the majority are run by telcos or established media firms. Even in Estonia – one of the world smallest media markets with the population of 1.3 million –

titative criterion equals pretty much to the share of viewing – then there is a certain correlation with the GDP per capita. A comparison of the national GDP per capita levels and PSM audience shares in Europe shows that there is a correlation between these categories. In richer countries, the PSM share of viewing is considerably higher than in less wealthy countries (Figure 1). The reasons lie in the historical cultural traditions. In older democracies, PSM are stronger than in transitional Central and Eastern European states.

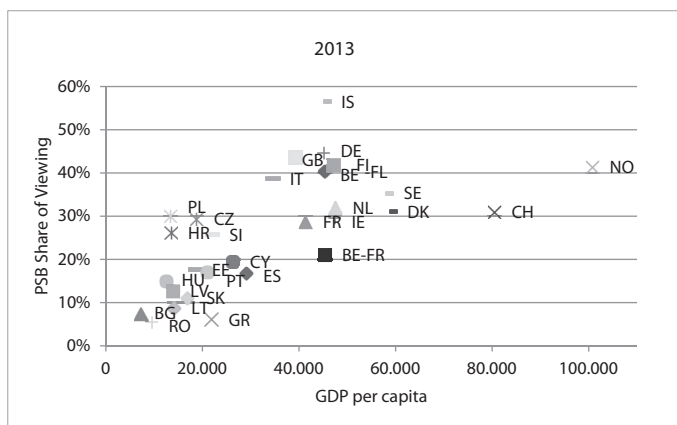


Figure 1. European public service broadcasters’ share of viewing and countries’ GDP per capita in 2013 (source: author’s calculation based on the EBU and the World Bank data)

there are available 340 TV channels and 45 on-demand audiovisual service providers (MAVISE 2014), although market where the EPB with its 28,6 million euro yearly budget (EPB, 2014) still has managed to keep 15–18% of the market share (TNS Emor, 2014).

### Public service broadcasting dependence of national wealth

When analysing the “life quality” of the European PSM today – which in the quan-

Compared to the first year of economic recession 2009, the average change of GDP per capita has increased by seven per cent and the change in the share of viewing by three per cent. There is no straightforward connection with the increase of GDP per capita and the PSM share of viewing. There are movements in all directions, but one trend is clear – in countries where the average GDP per capita during this years has decreased there also public-service broadcasters have lost their market shares (Figure 2).

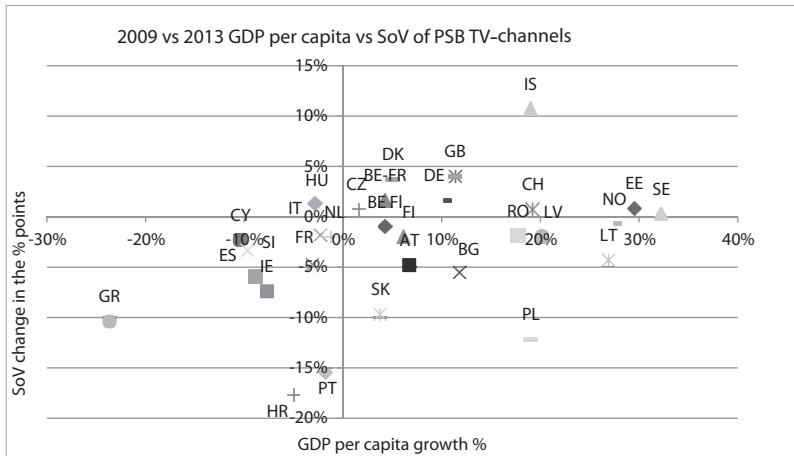


Figure 2. *European public service broadcasters' share of viewing and countries' GDP per capita change from 2009 to 2013* (source: author's calculation based on the EBU and World Bank data)

In addition to the state of economy, the other aspect which influences directly all media, including public service broadcasting, is the size of the market (Lowe et al. 2011). Due to the economy of scale in small countries PSBs need to have higher funding level per capita than in large countries (UNITEC 2005:173).

There are no clear criteria how big or small audience market share should be considered critical or from what level the marginalization of PSM is a real threat. It is encouraging that with ca. 15–18 per cent daily viewing share, Estonian citizens have not lost faith in the public service broadcasting. The reliability of public service broadcasting is stable at a high level and it is still remarkably important for society (ERR, 2014b). Despite the long-lasting under-financing (especially compared with per capita funding in Scandinavian countries (EBU, 2013)), the EPB has still kept its

leading role as a platform for public debate and a source of reliable news (AEF, 2014).

At the same time, it might be a big challenge to all Baltic countries to keep the existing position of PSMs. The overall liberalization and the market-driven European Union media policy are working in favour of commercial broadcasters. It is unrealistic to expect that liberal politicians in power will agree to increase the PSM funding from state budgets in the next five years to a level which will help raise the Baltic PSM's market share from ca 15 per cent today up to European 30 per cent level. Taking into consideration the increasing international competition and trends of audience fragmentation keeping the funding of PSM on the existing level might end up with the decrease of their share of viewing in the future and diminish their role in the public sphere.

## TV-viewing trends

One might think that a larger offering should increase the overall consumption of the broadcasted content, but this is not the case. According to the European Broadcasting Union (2014), the overall TV-viewing and radio-listening time is not increasing – the average times are quite stable. The main broadcasters in many, especially in western European, countries are still keeping their market leader positions. In turbulent times, this must be considered as good news, but in terms of ratings and the share of viewing / listening the health of the broadcasting

For the valuation of TV-consumption addition to the viewing time and the share of viewing, the third criterion – reach – should be also analyzed. During the last decade, the reach of the Estonian Public Broadcasting is in decline (Figures 4, 5). It is interesting to compare this trend with the trend of the frequent internet usage. It looks like there is a correlation between the increasing number of frequent internet usage and a decline of television reach (Figure 4).

An easy explanation to this trend, which is not Estonian-audience-specific, is that young people are now online and do not

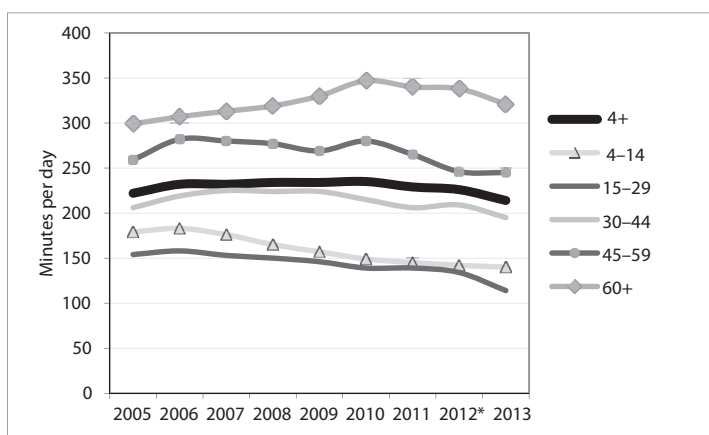


Figure 3. *Average daily TV viewing in Estonia by age groups* (Total TV, minutes per day) (source: TNS Emor)

industry is not as brilliant as it was even a decade ago (EBU, 2014). Similarly to the market average, the Estonian PSM share of viewing has been during the last decade quite stable. Also, the average viewing time has not changed much, but we can see two opposite trends – younger people spend less time on watching public service television and elder people are watching it more (Figure 3).

watch TV any more. But if to look for a correlation between the reach and the internet usage over the last decade in different age groups, then the main loss in reach is caused by adults aged 35–64. People over 65 are still the main TV viewers, but the reach among them is declining, too (Figure 5).

It is true that television has problems with young audiences. But actually during the internet era not much has changed.



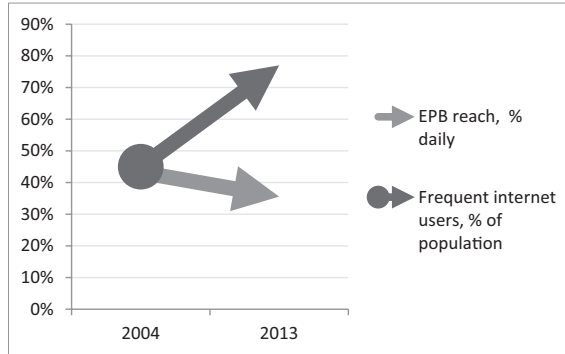


Figure 4. *Change of the EPB daily reach and the percentage of frequent internet users, 2004–2013* (source: author's calculations based on the Eurostat and TNS Emor data)

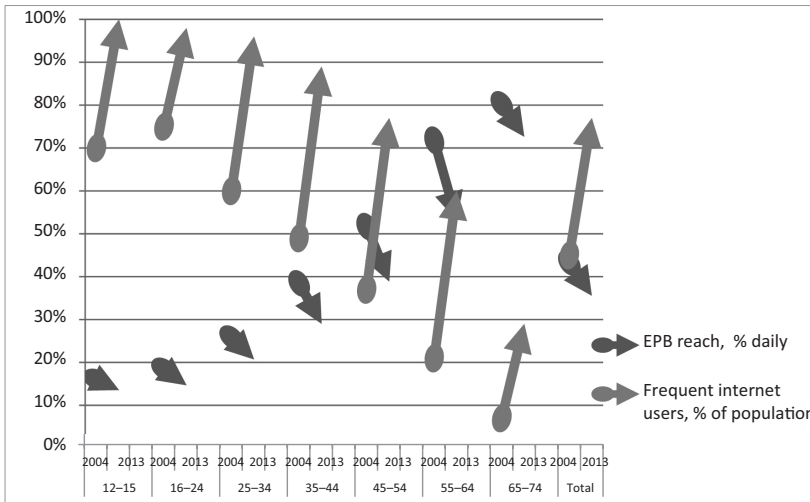


Figure 5. *Change of EPB daily reach and percentage of frequent internet users 2004–2013 by age groups* (source: author's calculations based on the Eurostat and TNS Emor data)

Television didn't attract kids and teenagers already a decade ago, and the decline of young audience is smaller than the decline of reach in other age groups.

Figure 3 shows that the total viewing time is quite stable. This is true when calculated as the average for the whole population. If to look at the time spent by people who actually are watching television, then their viewing time has increased quite considerably (Figure 6). In the EPB case, the

total average spent time calculated on reach during the last ten years has increased by 22 per cent (from 1 hour 23 minutes in 2003 to 1 hour 41 minutes in 2013).

The conclusion from here is: the EPB has no viewing time decline problems with people who still are with the public service television: these people watch PSM more than ever, but the EPB has difficulties to keep them. For PSM, it will be crucial to tie audiences much more strongly to their offerings.



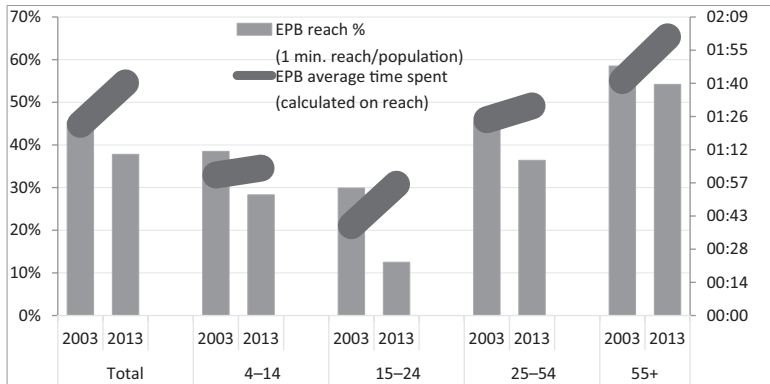


Figure 6. Change of EPB daily reach and the average time spent, 2004–2013 (source: author's calculations based on TNS Emor data)

Little comfort comes from the knowledge that at a certain age people start to find PSM. And if they have found it, then there is a chance that they will stay with it when they grow older. An example of the Estonian television is as follows. As is seen, the reach in the age group 15–19 in 2003 is equal to the reach in the age group 20–29 ten years later. A similar trend can be seen also in the next age groups (Figure 7).

The analyses presented above are based on the traditional rating systems – these

technologies attempt to render the audience visible to the television industry. The audience is constructed as relatively coherent, and its members are read as “consumers”. The rating industry is focused on the passive measures of audience response. The additional input needed for decision making comes from qualitative research. The “temperature” of PSM can be largely measured by and through the behaviour of the main audience groups. Their “attitude” is the key to the future. In business manage-

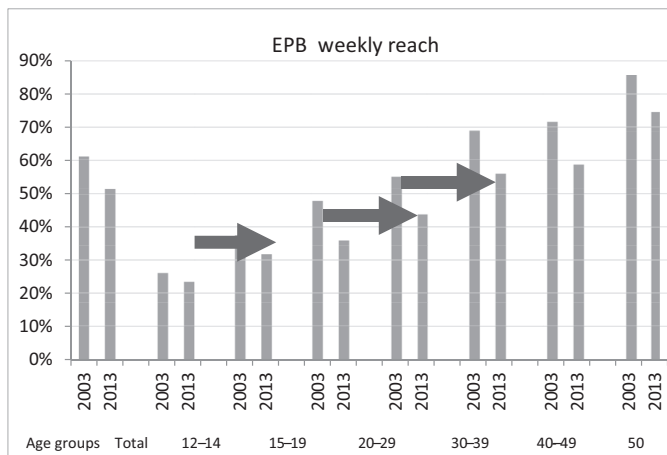


Figure 7. Change of EPB weekly reach by age groups (source: TNS Emor data)

ment research “Net Promoter Score”, the customer loyalty metric asks one simple question: “How likely is it that you would recommend our company / product / service to a friend or colleague?” Companies who receive on a 10 point scale more scores (9 and 10) compared to 0 to 6 are valued as healthy ones (Reicheld, 2003). An analogous question can be formulated: “Do you miss me?” Unfortunately, the Ofcom (2014) research shows that the traditional media are giving up their position of being most missed media. The Ofcom report and similar surveys in other countries reveal that television has already lost its importance among people under 35 (Figure 8), and the trend continues. It will be most likely that already in the next couple of years also people under 44 will feel that going online is more important than watching television. Hence, thanks to the new consumer technologies, the monopoly of fixed linear program schedules is challenged.

The reason for this audience behavioural trend lays in convergence. Jenkins (2006) has defined convergence as the flow of content across multiple media platforms, the cooperation between multiple media industries, and the migratory behaviour of media audiences who will go almost anywhere in search of the kinds of entertainment experiences they want. Convergence is not primarily a technological process bringing together multiple media functions within the same device. Instead, convergence represents a cultural shift as consumers are encouraged to seek out new information and make connections among the dispersed media content. “Decisions about what television content to watch and where to watch are shaped by emerging norms of social associations as organized around fan communities, religious groups, ..., political groups and other interest-driven networks” (Jenkins et al., 2013: 128). Appointment based model (fixed times and programs)

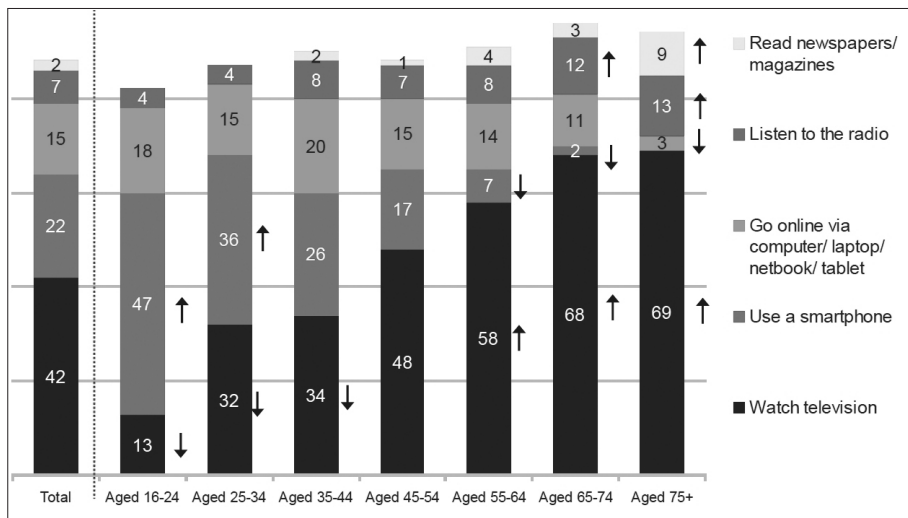


Figure 8. **Most-missed media TOP5 mentions**  
 (source: Ofcom: Adults’ Media Use and Attitudes Report 2014, Figure 8, page 23)

is challenged by engagement based model (networks interests).

This trend puts a lot of pressure on the public service media companies. What must be done and how to meet the audiences' expectations? One answer is to create Extensions – efforts to expand the potential markets by moving the content across different delivery systems. And there has been a lot of talks about Synergy and Audience Engagement (Bennett et al., 2013; Jenkins et al., 2013). Audience engagement collects and canalizes the narrowcast content created on grassroots to the (commercial) broadcast systems. Jenkins states that for being engaging, the media should be spreadable. Spreadable refers to the potential – both technical and cultural – for audiences to share content for their own purposes (Jenkins et al., 2013: 3). The research of spreadability helps to understand how the content moves across the cultural landscape. If these steps and principles are agreed upon and implemented in daily practices, then there will be the question how to measure the results. This brings us to a set of new criteria which can be used for PSM valuation. For example: how big part of population is accessing the PSM content via these devices (smartphones, tablets, game consoles), how frequently and for how long, how big a part of PSM services and content are available on these platforms? PSMs being not accessed over these devices can be interpreted as weakness and fall short in fulfilling public service obligations.

It is quite easy to set measurable targets for the content usage on different platforms. Digital technology provides us plenty of kinds of data usage. It is much more than

diary-based surveys or people meter statistics. But there is also a major problem for media researchers to solve: how to add up content usage on all different new platforms and how to connect these numbers to the census data? For this purpose, the media research companies are developing and testing new methodologies and technologies. We are looking for the new universal audience measurement currencies which should be as easy to use as the ratings and share of viewing / listening are for the valuation of traditional linear TV and radio today. And even if the common currency will be introduced, then the big question is how to measure not only the quantitative aspects, but also the quality. For example, how to measure the PSM content 'spreadability', how to value the role of PSM in the participatory culture, how to measure the audience engagement?

The presence on social networks, the number of tweets, YT likes and FB shares created by a certain program can be counted, but it is more difficult to count audience engagement. Audience engagement is one important aspect for understanding broadcaster–audience relations and the impact of the created content on society. Engaged audiences are not only more loyal, but they also help the media companies to improve their offerings (Loosen and Schmidt, 2012). Engaged audiences can be considered as an extra creation resource. One can say it is a free labour for the media industry (Bolin, 2012). Nowadays, audience engagement takes place mainly, but not only, through online environments. The value created by engaged audiences is hard to measure, but it can be significant (Bechmann, 2012). It

can be so significant that in some countries (for example, Germany) there are strict rules and limitations for PSB online activities.

### Budgetary thinking

Today, the budget of the Estonian Public Broadcasting is in a sense reflecting the traditional media technology, the traditional channels radio and television (ERR 2014b). Resources dedicated directly to online and mobile activities are marginal if compared with the television and radio production costs (Figure 9).

genres. Only in 2014 the ‘Portals’ reached their status as an independent channel equal to the radio and TV channels. The matrix structure where the content created in different editorial departments is distributed over all output channels is emerging step by step. Day by day, new creative ways of convergence are developed. The area for the further analysis should be about the value and effectiveness of retransmission (re-use) of the content originally produced for radio and TV to the content which is especially produced for online and mobile platforms. The online environment gives a possibility to re-use the

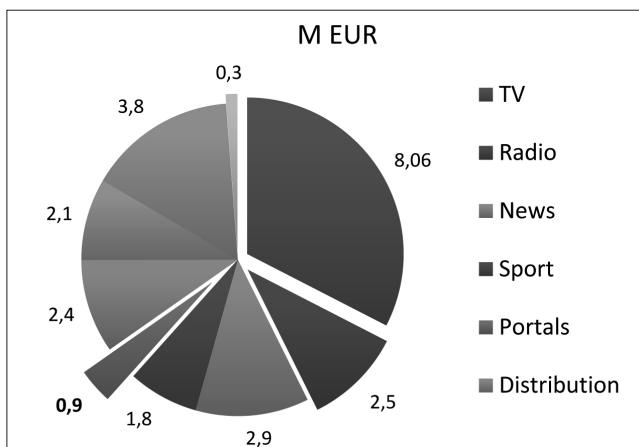


Figure 9. The EPB budget by the main genres in 2014 (source: ERR)

At the same time, of course, a lot of content distributed through online and mobile platforms is produced for and by TV and radio, and the related costs are covered by these production units. Therefore, a direct comparison of radio and TV budgets with funds allocated for the online department gives a biased picture. But still the budget reflects the company structure and the main focus areas. Today, the structure of the EPB is built up around the distribution channels and

existing material created for the traditional media, but more and more the special original content is online-specific. And from the PSM company perspective, it is important to understand and measure the effectiveness of creating a synergy among all platforms. This should be a task for the EPB crossmedia strategy. Merivee (2014) argues that even all of the EPB executives acknowledge the necessity of crossmedia, the organization lacks a collective understanding of how to act in

accordance with crossmedia, and the clear strategy for the crossmedia development is not in place (Merivee, 2014: 54).

Despite the loose central planning and coordination of crossmedia activities, the EPB is present in many social media environments (Facebook, YouTube, Twitter, Soundcloud, Spotify, Vimeo, Instagram, and others). This can be called also innovation; even in the year 2014, the presence of the social media is almost a hygienic factor. The simplest way to be present there is to use the existing radio and TV content – to copy and paste. This is justified in case when the content reaches the audiences which are not reached through traditional channels.

The Estonian liberal media policy is not in favour of a remarkable increase of PSM funding in the nearest future. The private market pressure to reduce PSM funding makes the EPB expansion into the online media difficult. However, as shown earlier, audiences, especially younger ones, abandon traditional broadcasting channels and are attracted to the online world. Hence, the Estonian Public Broadcasting is facing a great challenge how to reorganise its daily working processes and resource in a way that an attractive (engaging) content will be produced and distributed on all existing media platforms without the extra state budget funds. One tool for that can be introduction

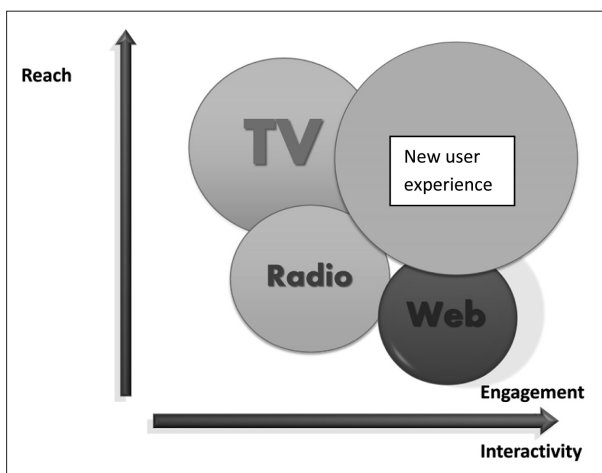


Figure 10. PSM convergence

However, the real innovation starts when the usage of these platforms creates an extra value – a new user experience which cannot be created otherwise (Figure 10).

## Conclusion

The overall liberalization and the market-driven European Union media policy are working in favour of the commercial media.

of the crossmedia strategy. If we see the audience trends caused by new technologies and the ways how the media content is created and consumed, then shouldn't we invest more into the innovation of processes and the innovation of products? In the case of the media, product innovation refers both to content and how it is made available to consumers, which are usually designed to

change users' behaviour. End users play a considerable role in innovation, as indicated most notably by the development of the concept of 'producer' (Bruns, 2008).

And if these criteria are agreed upon and set, then (maybe) the existing priorities will be overviewed and the budgets will be adjusted accordingly.

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## VISUOMENINIO TRANSLIUOTOJO PASLAUGOS: ESTIJOS ATVEJO ANALIZĖ

Andres Jõesaar

S a n t r a u k a

Naudojant McQuailo teorinę žiniasklaidos institucijoms įtaką darančių veiksnių sistemą, straipsnyje nagrinėjama, kaip žiniasklaidos politika, ekonominės sąlygos ir technologiniai pokyčiai veikia Estijos visu-

meninės transliacijos evoliuciją. Didejant rinkos spaudimui ir keičiantis žiniasklaidos vartojimo būdams, kokybės užtikrinimas, įvairovė ir pluralizmas visose žiniasklaidos turinio platformose yra neišvengiami de-



mokratinėse visuomenėse ir turėtų būti komunikacijos politikos uždaviniai. Politinė administracinė sistema mato ekonomiką (įskaitant žiniasklaidos ekonomiką) pirmiausia kaip liberalią, kuriai reikia kiek įmanoma mažiau reguliavimo; sykiu reguliavimas yra būtinas tam, kad būtų garantuota viešojo sektoriaus žiniasklaidos (transliacija) veikla. Šio konflikto pagrindas yra nepakankamas visuomeninio transliavimo paslaugų politinėje administracinėje sistemoje teisėtumas. Estijos liberalios rinkos ekonomikoje nepakankamas teisėtumas yra išreikštas nepakankamu Estijos visuomeninio transliavimo finansavimu. Europos mastu Estijos visuomeninė transliacija su kitais Vidurio ir Rytų Europos visuomeniniais transliuotojais patenka į nedidelio finansavimo ir mažo efektyvumo grupę. Vis dėlto Estijos visuomeninės transliacijos turėtų sugebėti tenkinti visus informacinės visuomenės nustatytus reikalavimus. Tai esminis visos visuomeninės žiniasklaidos finansavimo ir valdymo iššūkis.

Kitas iššūkis, su kuriuo susiduria Estijos visuomeninė transliacija, yra žiūrovų perėjimas iš televizijos į internetą. Nors vidutinis televizijos žiūrėjimo laikas per pastaruosius dešimt metų yra gana stabilus, tačiau bendras Estijos visuomeninės transliacijos pasiekiamumas mažėja. Tai nėra jaunesnio amžiaus žmonių grupių klausimas, pagrindinis nuostolis atsiranda dėl 35–64 metų amžius žmonių grupės. Būdingas bendras žiūrėjimo stabilumas, nes kasdienis televizijos žiūrėjimo laikas tų žiūrovų, kurie žiūri Estijos visuomeninės transliacijos kanalų, yra padidėjęs 22 procentais. Iš čia ir kyla išvada: Estijos visuomeninė transliacija neturi problemų, susijusių su televizijos žiūrėjimo laiko mažėjimu, tačiau ji susiduria su sunkumais išlaikyti šiuos žiūrovus. Visuomeninei žiniasklaidai labai svarbu stipriai pririšti žiūrovus prie savo siūlymų.

Remiantis „Ofcom“ 2014 metų suaugusiųjų žiniasklaidos naudojimo ir požiūrio į ją ataskaita, televizijos žiūrėjimas yra svarbus daugumai žmonių, vyresnių nei 45 metai, o jaunesnius žiūrovus patraukia išmanieji telefonai, kompiuteriai bei nešiojamieji kompiuteriai. Konvergencija yra tokios žiūrovų elgsenos priežastis. Konvergencija pirmiausia yra ne technologinis procesas, sujungiantis daugialypes žiniasklaidos funkcijas tame pačiame mechanizme. Konvergencija reprezentuoja kultūrinį pasikeitimą, nes vartotojai yra skatinami ieškoti naujos informacijos ir užmegzti ryšius tarp išsisklaidžiusio žiniasklaidos turinio. Visuomeninės žiniasklaidos kompanijos požiūriu, svarbu suprasti ir įvertinti visų platformų sinergijos kūrimo efektyvumą. Tai turėtų būti Estijos visuomeninės transliacijos susikertančių medijų strategijos uždavinys. Teigiama, kad nors visi Estijos visuomeninės transliacijos vadovai pripažįsta susikertančių medijų būtinybę, tačiau trūksta bendro supratimo, kaip jomis naudotis, ir neturima aiškios susikertančių medijų vystymo strategijos. Nors susikertančių medijų veiklų centrinis planavimas ir koordinavimas yra laisvas, Estijos visuomeninės transliacijos yra socialinės žiniasklaidos aplinkoje. Paprasčiausias būdas joje dalyvauti yra naudoti esamas radijo ir televizijos programas – kopijuoti ir įklijuoti. Vis dėlto tai bus nepakankama – žiūrovams išlaikyti reikia plėtoti viešųjų paslaugų žiniasklaidą. Estijos visuomeninis transliuotojas susiduria su dideliu iššūkiu, kaip pertvarkyti savo kasdienio darbo procesus ir išteklius taip, kad būtų sukurtas patrauklus turinys ir platinamas visose esamose žiniasklaidos platformose be papildomų valstybės biudžeto lėšų. Vienas iš būdų galėtų būti susikertančių medijų strategijos taikymas. Aiški vizija ir gerai pagrįsta ir įgyvendinama strategija turėtų būti įrankis, padėsiantis atlaikyti rinkos spaudimą ir pasitikti konvergencijos laikų iššūkius.