

# Polarised television audiences. The outcomes of the Estonian and European audiovisual media policies

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**Abstract.** *The European Union's (EU) liberalisation of media policies and its content quality bias towards economic efficiency has resulted in a situation where, in some small markets like Estonia, the audience is divided into two parts. The Russian-speaking audience in Estonia mainly follows Russian state TV channels, and the Estonian-speaking audience watches Estonian television channels. This has happened even though the EU media policy should ensure freedom of information, diversity of opinion and media pluralism. Findings from the Estonian case study show that despite the noble aim of the EU media policy, Estonia has two radically different information fields: Estonian-language media promotes European values, and Russian state media, enjoying high popularity among the Russian speakers, promotes 'Putin's values'.*

*The question is whether the EU legal instrument — Audiovisual Media Service Directive (AVMSD) — is an efficient tool when disinformation from third countries is disseminated with the aim of gaining a political influence over the EU member states' citizens. The recommendation is that the AVMSD should be revised in a way that prevents unfair competition directed from third countries and tools should be developed to compensate for market failures.*

**Keywords:** *European Union media policy, Russian-speaking audience, public service broadcasting, Estonian Public Broadcasting.*

## Introduction

This article argues that the Estonian government's 'idealisation' of market forces — supported by the European Union media policy, which is driven by common market ideology — does not take into account media companies' actual capability to provide a large range of media services and thus limits the offering of quality local content to all groups in society. Until recently, this has been interpreted mainly as an economic issue, but the events in Ukraine and the increasing wave of Russian propaganda has put this issue in a different light, falling under the national security domain. This is the first time that Europe as a whole must tackle this specific media service sphere, leading to the questions of how to handle Russian propaganda and how to prevent its influence on EU citizens. In Estonia, and in other Baltic states as well, the influence of Russian propaganda on the Russian-speaking audience is of great concern. There is no mutual understanding about the role and possible impact of the Russian language television programming, but the fact is that Russian television channels enjoy a significant popularity among the Russian-speaking audiences (Saar Poll, 2104; Seppel, 2015).

How, by whom and to what extent television programmes for the Russian-speaking audiences in EU member states are created is a political issue which is influenced by internal and external security questions, overall economics and by EU media policy, and this debate has strong historical roots.

## Population changes from Soviet times to present

Before World War II, Estonia was a relatively homogenous nation state; 88.1 per cent of Estonia's inhabitants were Estonians, and larger minorities included Russians and Germans. Estonian was the national language; all the main spheres of the state (political leadership and management, education, science and culture) were executed in Estonian. The war led to drastic changes: from the 1940s onwards, after being incorporated into the Soviet Union, Estonia lost nearly one-fifth of

its population due to mass repression, war activities and political exile. Due to mass immigration from the Soviet Union's member republics, especially from the Russian Federation, Estonia's population became multinational in only a few decades. The newcomers were mainly Russians and Ukrainians and Belarusians who spoke Russian. In the Soviet Union, the Russian language had the status of being the language of communication between and within different nations, meaning that in practice Russian was used as the official language. The majority of the Russians who had moved to Estonia after WWII never learned the local language or became part of the Estonian community; rather, they formed their own Russian-speaking community, which, by the end of the 1980s, accounted for 35.2 per cent of Estonia's population. The regaining of independence by Estonia in 1992 caused large-scale transformations in politics and economics. The majority of the large trans-union industries lost their market and fell apart. The Soviet Army was pulled out of Estonia in 1994. Noteworthy numbers of the Russian-speaking population lost their occupations and began to move elsewhere. There has been a significant decrease and nationality ratio change in Estonia's population during the last two decades. In 1990, the total population was 1.57 million, which included 61.5 per cent of Estonians. In 2014, the total population had decreased to 1.31 million, among whom 69.1 per cent were Estonians; still, 30.3 per cent of the population in age group 15-74 declared that their first language is Russian (Estonian Statistics, 2015).

### **A paradigm shift**

Starting at the end of the 1980s, Central and Eastern European (CEE) countries aimed to change from being a communist regime to becoming free democratic welfare states. Among important aspects of that development were changes in the media systems; 'Europeanization', as defined by Jakubowicz (2003), took place. One of the key drivers of that shift was an attempt to replace Soviet media policy with the Western, soon to become, Pan-European media policy. The overall aims of Pan-European media policy are preserving cultural diver-

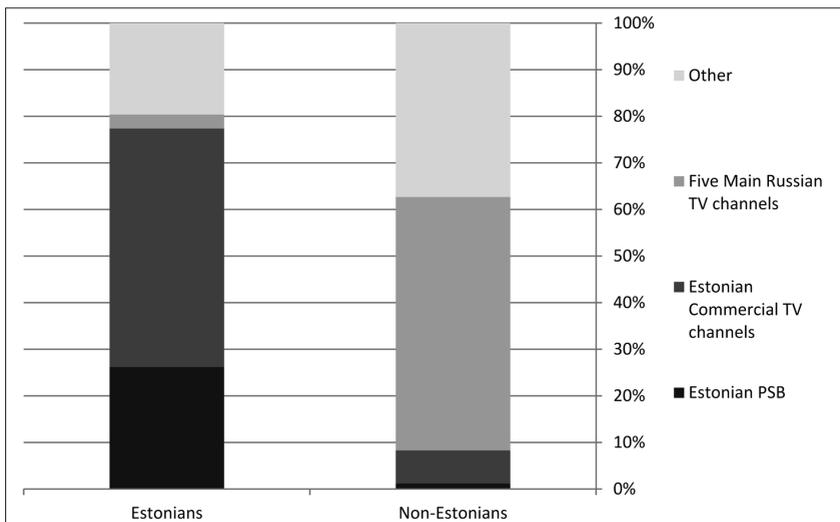
sity and safeguarding media pluralism. To meet these aims, there are two main approaches to organizing the media: the free market liberal and collectivist-statist strategies. Coming from the communist regime, an alternative, the collective provision, was difficult to introduce due to the experiences of the recent past. Therefore, the first strategy was mainly introduced in CEE countries, especially in the Baltic States. The free market liberal approach was supported by the EU media policy, which is a common market ideology. The main European legislative document — the Audiovisual Media Services Directive (AVMSD), and its predecessor, the Television Without Frontiers Directive — does not take into account country-specific circumstances such as the size of the national (and media) market, economic conditions or specific cultural and historical contexts. However, these are important factors, which have a strong influence on media development and performance. Market size determines resource availability. In smaller states, there are fewer resources available (Lowe et al., 2011). Due to market limitations, it is unprofitable to launch a wide range of media products on smaller markets. The diversity of content offered will be lower in smaller states than on large markets. In the first place, commercial media focuses on mainstream content. But if the market is not big enough for private sector to deliver variety of media products in national language how then interests of minority groups are served? From economic perspective Russian-speaking audience in small countries is a tiny unprofitable niche market (Jõesaar et al., 2014). At this particular case Estonian market-based media system is incapable of presenting a full range of political and economic interests in the public domain, especially for language minorities.

When talking about the economic background of multilingual markets, Hesmondhalgh (2013) refers to the preferences of different ethnic groups and defines these markets as geocultural markets. These markets are not homogeneous. Even if there is a shared history among countries, its interpretation still remains largely different for main ethnic groups. It is more relevant to talk about geolinguistics and diasporic media. There are definitely some positive examples of cross-border television

execution with cultural consequences, but the separation of the Russian-speaking audience from the Estonian information field caused by viewing of foreign Russian channels creates many challenges for Estonian society. Gitlin (1999) 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 society. It is argued that if there are no ongoing negotiations among members of different groups, then media can provide help. Media policy should be developed to support these communication processes and to secure media stakeholders’ adequate performance.

### TV broadcasting in Estonia: two information spheres

In Estonia, fulfilment of aforementioned principles is guaranteed for the media targeting the native part of population: Estonians. Valuation of the public service media (PSM) performance is more problematic



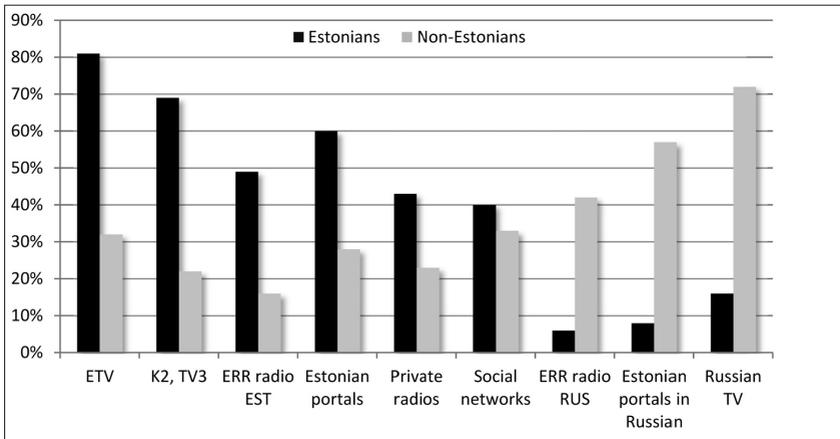
**Figure 1.** Average weekly share of viewing in Estonia in 2014. Age group 4+, Estonians and non-Estonians. Source: authors’ calculations based on TNS Emor data.

in case of the Russian-speaking audience. Raadio 4, the Russian-language public-service radio channel, mainly serves the interests of Russian speakers. The limited size of the target audience (around 350.000 people) makes broadcasting in Russian an unprofitable activity for commercial broadcasters, and therefore, there are no private nationwide television programmes in Russian in Estonia.

Hence, Estonia faces challenges in providing pluralistic reliable content for all of society, especially the Russian-speaking (also referred to as non-Estonian) part of society. The result is that a major part of the Russian-speaking audience is actually not inside the country's internal information sphere but is actually a member of the Russian state's information sphere (Figure 1).

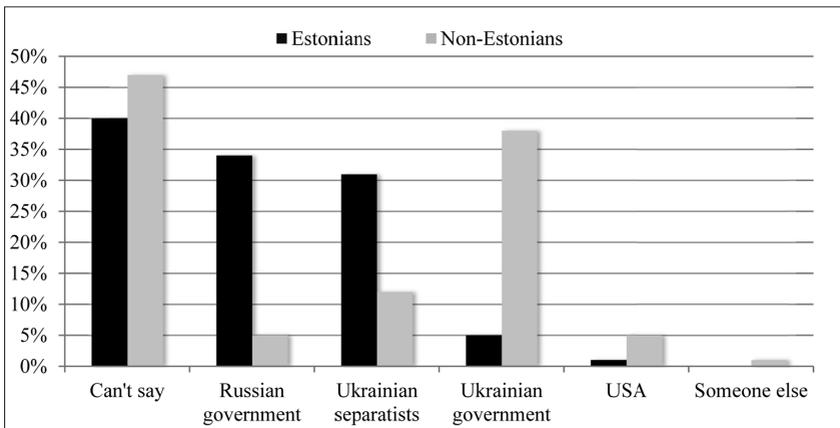
Research data (Saar Poll, 2014) show that among Estonians and non-Estonians, the frequency of following the news is similar. As expected, the differences are present in the sources of information that Estonians and non-Estonians consider important for following current events. When it comes to types of media, for both Estonians and non-Estonians, television is number one. For Estonians, Estonian Television (a public service broadcaster) is the main source of information, with 81 per cent of the respondents considering it very important or rather important. For 72 per cent of the non-Estonians, the most important sources of information are Russian state television channels (e.g. PBK, RTR Planeta Baltic, NTV Mir or Ren TV Estonia) (Figure 2).

The Saar Poll's (2014) study participants were also asked who, in their opinion, was responsible for shooting down the Malaysian passenger airplane in the Eastern part of Ukraine. Among both Estonians and non-Estonians, a large share of respondents did not know how to respond to the question (40 per cent of Estonians and 47 per cent of non-Estonians). This is evidence of how, regardless of ethnicity, a very large proportion of people have difficulty forming an opinion based on the information that they have. Among those respondents with an opinion, a distinct difference is present (Figure 3):



**Figure 2.** Importance of the media channels among Estonians and non-Estonians (Russian speakers).

Source: authors' calculation based on Saar Poll 2014.



**Figure 3.** Responses to the survey question: 'Lately there has been a lot of talk about the Malaysian passenger airplane that was shot down in Eastern Ukraine and who could be possibly responsible. In your opinion, who is responsible for shooting down the plane?' (Since each respondent could give more than one answer, the sum of percentages can be over 100).

Source: Saar Poll, 2014: Figure 19.

- Estonian respondents stated that either the Russian government (34 per cent of respondents) and/or the Ukrainian separatists (31 per cent of respondents) were responsible.
- Non-Estonian respondents primarily stated that the government of Ukraine was responsible (38 per cent of respondents).

The findings of the survey indicate that two radically different information fields exist in Estonia: Estonian language media promotes European values, while Russian language media promotes 'Putin's values'. Paradoxically, the legal framework established by the AVMSD guarantees the existence of both.

### **Criticisms of the AVMSD**

Why has the EU media policy — which aims to guarantee media pluralism and diversity needs for the development of democracy — resulted in a situation where in some member states, a remarkable part of the population is strongly tied to the non-European information field? The answer can be found in the fact that the EU media regulation does not take into account different economic (including factors such as the size of the market, availability of resources, international competition etc.), historical or cultural differences between member states. The AVMSD should help to achieve the objectives of the EU. The directive should ensure freedom of information, diversity of opinion and media pluralism. The question is whether it is also an efficient tool when disinformation from third countries is disseminated with the aim of gaining political influence over a member state's citizens.

The EU's liberalisation of media policies and its content quality bias towards economic efficiency has resulted in a situation where, in some small national markets (for example Latvia, Estonia and Moldova), the most profitable broadcasting business models are based on the rebroadcasting of Russian state-controlled TV programs and advertising sales to these channels. The EU's aim of securing free movement of capital and services has, in reality, ended up supporting the dissemination of Russian propaganda. Re-broadcasters of Russian TV channels are selling commercial airtime in the Estonian market, and the money earned will leave Estonia, thus, weakening the Estonian audiovisual industry.

These actions can be seen as politically motivated price dumping in the advertising market.

This business model is supported by the Russian state and the distribution of Russian propaganda content serves Russia's political agenda. Due to unfair economic competition from abroad and market failures, the Estonian private sector is not able to serve language minorities with locally produced media content. Ruling governments have paid little attention to this issue and possess only a moderate desire to grant the necessary funds to Estonian Public Broadcasting (ERR); this has not enabled ERR to fulfil its remit to serve minority interests. Without the support of the EU's strongly binding legal instruments, Estonian public service broadcasting lacks the funding required to achieve the same powerful and legitimate position that Western European and Nordic public broadcasters hold. In these circumstances, instead of the EU Commission's concerns of overfunding of PSBs, and looking for possible violation of the state aid regulation, there should be EU legal instruments to ensure that PSBs are not underfunded. In cases of underfunding, it is clear that PSB remits might not be fulfilled and minorities' rights to receive democratic and pluralistic content may not be protected.

## **Conclusions**

In conclusion, the AVMSD should be revised to prevent unfair competition that stems from third countries. Tools should also be developed to avoid undue media concentration and to compensate for market failures. The unfair competition posed by the rebroadcasting of Russian television programmes should actually fall under competition law, but it is extremely difficult to take any action against third country broadcasters on that legal basis. The Creative Europe programme cannot provide a permanent solution to Estonia's uncompetitive production and broadcasting industries, although it might offer some short-term relief. Any long-term solution should ensure that the legal framework and conditions for the use of state aid guarantee sufficient funding of PSB.

Several studies (Seppel, 2015; Jõesaar, 2011; Lauristin, 2009; Shein, 2005) underline the special role PSM has in small countries like Esto-

nia. In markets where private broadcasting is commercialised or where there is a threat of Russian propaganda, it is especially important that PSM maintains its role as a reliable provider and trusted source of information. PSM's role in the public sphere in substantiating and supporting democratic development and pluralism is crucial having a direct influence on society and citizens. Enhancing democracy and cultural heritage, improving social cohesion, developing a platform for open debate, guaranteeing media pluralism and being a source of reliable and independent information are important functions of PSM. When these functions are not fulfilled, the overall development of democratic society is under serious threat.

Additional financial resources could help ERR emerge transition from a traditional public service broadcasting company into a public service media company, introducing new innovative services on all platforms (Ibrus, Ojamaa, 2014) and better serving the interests of the Russian-speaking population. Funding increases are a question of political will. Depending on the political will, the changes in media policies towards a new media paradigm can be public-service media supportive or limiting (Doyle, 2013; Lowe et al., 2014).

On the EU level, there are no binding mechanisms dictating the minimum funding level a member state should guarantee for PSBs. There are no EU financial instruments as there are, for example, solidarity funds for infrastructure development dedicated to the enhancement of public service media. Decisions regarding the remit, funding model and funding level of PSBs are left to member states. There are no common PSBs models or standards that apply to all countries. Governance and financing models, remit, legal frameworks, relations with political powers and accountability obligations towards society vary widely.

Without the support of the EU's strongly binding legal instruments, Estonian public service broadcasting lacks the funding required to achieve the same powerful and legitimate position as Western European and Nordic public broadcasters (EBU, 2015). In these circumstances, instead of the European Commission's concerns of overfunding PSBs of possible violations of state aid regulation, there should be legal instruments put in place to ensure that PSBs are not un-

derfunded. In cases of underfunding, it is clear that a PSB's remits might not be fulfilled and citizens' right to receive democratic and pluralistic may not be protected.

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